Active Review Administration and User Manual

SIRE Solution Suite

An Official Manual of SIRE Technologies
Document and Legislative Management Software
Version 6.3

A Publication Of

SIRE TECHNOLOGIES

Better Outcomes.

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1 Overview

The Active Review Client Portal allows clients to submit documents to a Municipality for review. Documents can be marked up by reviewers and then sent back to the client for more information.

To submit documents, clients access a web portal provided by SIRE and hosted by the Municipality. From the web portal, clients can create an account, complete forms created by the Municipality and submit available document types determined by the Municipality.

Once a client has submitted an item for review, they can login to the portal at any time to check the status of the item. If more information is needed from the client, an email is sent to them requesting their attention to the item.

Within the Municipality, SIRE workflow tools are used by reviewers in order to automate the process. The review process is configured based on the rules of the Municipality. Reviewers have the ability to view submitted documents, markup the documents should any corrections need to be made, and use the Brava Viewer to view document versions side-by-side or as an overlay to validate changes.

The SIRE portal and reviewing tools provide a common environment for all users to share a common product experience. The SIRE reviewing tools also provide the ability to view and compare virtually any document format including office documents, images, CAD files and more.

2 Using the Active Review Client Portal

Clients use the Active Review Client Portal to enter information into forms to which they have access. Before information can be entered into a form, clients must log in to Active Review:

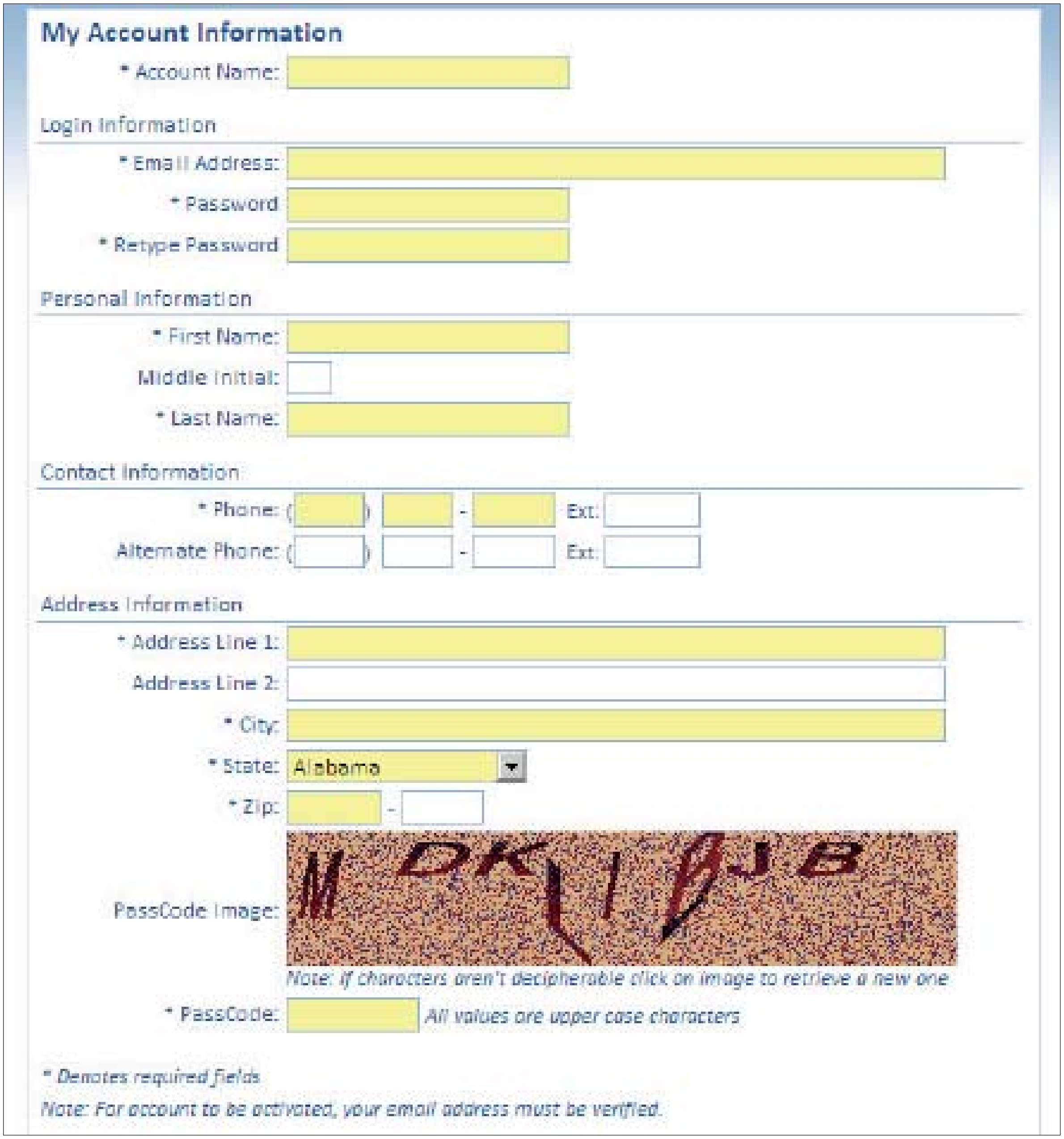
- If the client has already established an account, they can enter their email and password in the appropriate fields in the login window shown below.
- If the client does not have an existing account, they must create one in order to log in.

Creating an Active Review Account

Before a client can log in to Active Review, they must create an account.

To create an Active Review account:

1. Select the **Click Here to Create an Account** link from the Active Review log in screen. The Account tab appears.



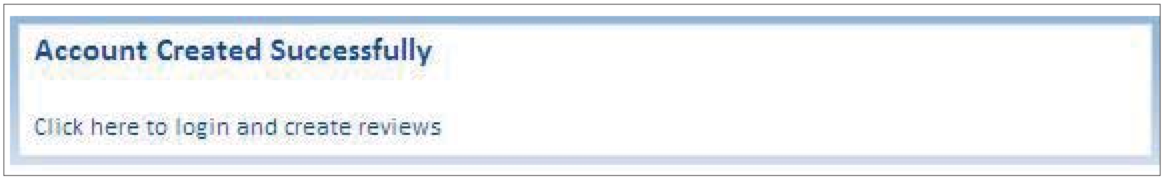
2. Type the appropriate information in the required fields (shaded in yellow).

3. A passcode must be entered upon completion. This code must be in all capital letters.

Note:	If the passcode is not entered correctly, the client will need to enter it AND their password again.

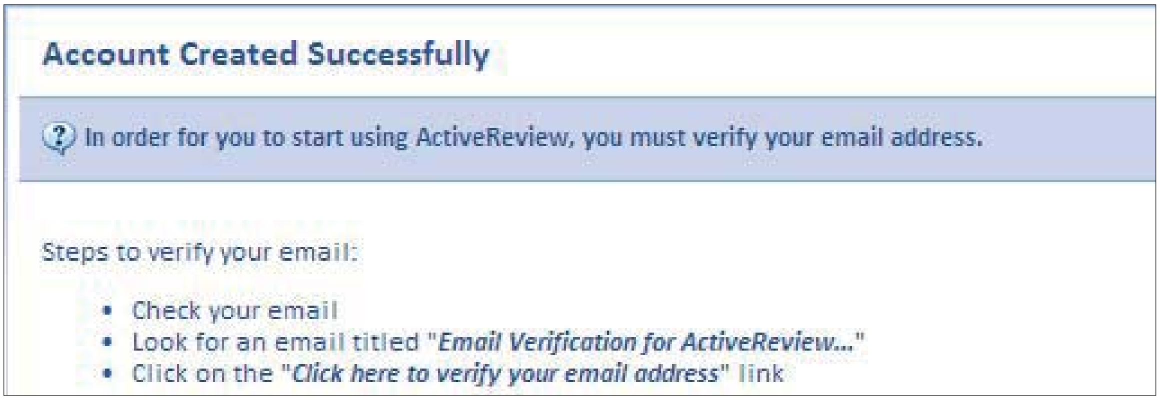
4. Click **Save Changes**. One of two things happen:

- A screen appears indicating that the account was successfully created.



Select the **Click Here to Login and Create Reviews** link. The Login screen reappears allowing the client to login using the user name and password they created.

- If the **Require Email Verification** setting is set to true, the account is created, however the client must verify their email before they can continue



The Client receives an email with a link to log in and verify their email address.

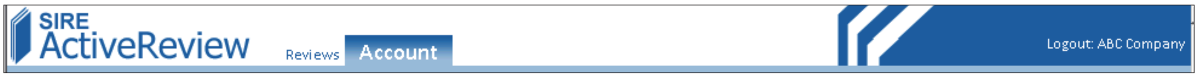
Active Review opens to the Reviews tab.

Editing an Active Review Account

There may be times in which you need to modify a user's account.

To modify an active review account:

1. Log into Active Review.
2. Click the **Account** tab next to the **Reviews** tab at the top of the page. The Account page appears displaying all of the information for the logged in user.



3. Edit any of the fields necessary, and then click **Save Changes**. You may need to scroll down to see the Save Changes button.

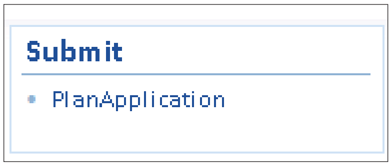
Understanding the Reviews Tab

The Reviews tab allows the client to enter information into any form to which they have access. These forms are customized by each individual site. The Reviews tab also allows a user to view previously submitted forms or to take necessary action on any form that has been returned to them.

Filling Out an Active Review Form

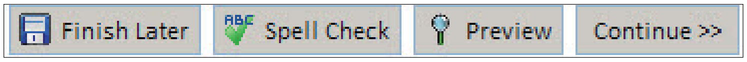
Complete the following steps to fill out an Active Review form:

1. From the Submit section, clients can select any form to which they have access. The forms are listed in the **Submit** section on the Reviews tab.



Upon selection, the form opens. Clients complete the form as needed, ensuring that all required fields (shaded in yellow) are populated.

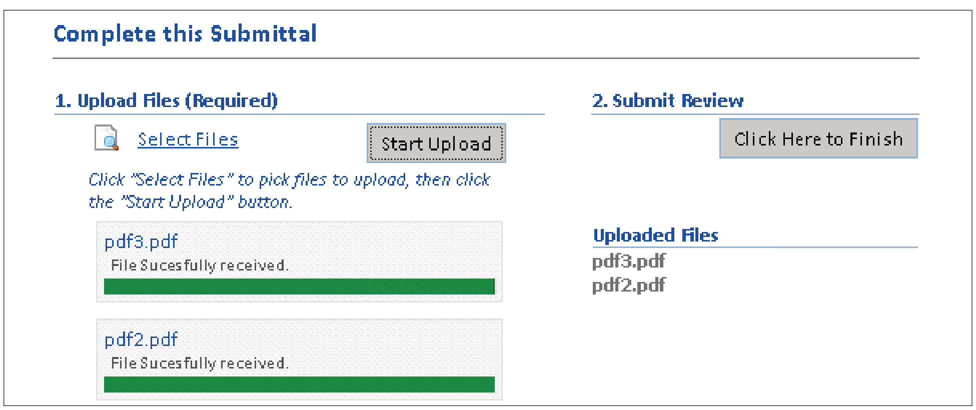
2. At the bottom of the form are some options as shown below.



Clients can select these options either while they are filling out the form or upon completion. These options include:

- **Finish Later**. Clients can choose this option if they are unable to complete the form in one sitting. The form is saved and placed in the Saved section on the Reviews tab. The client can go back to the form and complete it at any time.

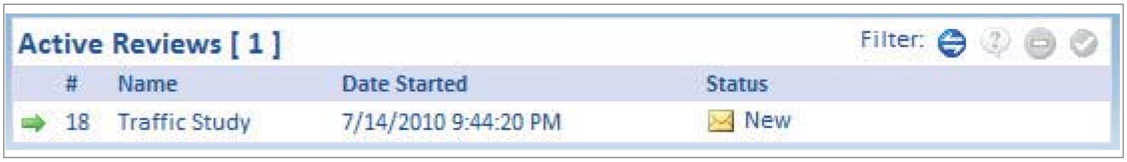
- **Spell Check**. Clients can choose this option to perform a spell check on the form.
- **Preview**. Clients can choose this option to preview the form as it will be submitted to the site.
- **Continue**. Clients can choose this option to submit the form to the site. Upon selecting this option, clients are provided with the opportunity to upload documents related to this form. The upload may be either required or optional.



Do the following to upload files:

- Select the **Select Files** link. Navigate to and select all necessary files.
- Click **Start Upload**. A message appears indicating that either the upload was successful or unsuccessful. The files you uploaded display in the **Uploaded files** section.
- Click **Click Here to Finish** to submit the form and all of the attached files.

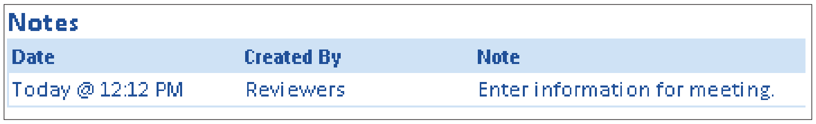
When forms are fully submitted, they appear in the Active Reviews section on the Reviews Tab.



Accessing Revised Forms

A form that has been submitted for review to a site can be sent back to the client requesting more information. When a form has been sent back to the client, a yellow notification bar appears across the top of the Reviews tab in Active Review indicating that they have reviews that need attention.

The client can click the link in the notification bar to open the item(s) they have for review. From here they have the following options:

Option	Description
Notes	View any notes entered for this item. If the client has permission, they can also add notes informing the reviewer of any action taken on this item. See the Notes table entry in the *Working with an Item in the Queue* section. 
Tasks	View any tasks entered for this item. If a file was marked up using the Brava Viewer, that file also appears in the tasks list. Clients can either click to mark this task as in progress or click to mark this task as complete. When clients click the **Complete**, icon a dialog box appears asking for a reason. Clients enter a reason, and then click **OK**. 

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Files</td><td>

Lists any files that were attached to the form. If a file is new, a green N icon appears (N). If a file has been modified, a red C icon (C) appears.

Other features include:

- If a new version has been added, a version number appears in the V column. When the client clicks the version number, they are able to compare the two (or however many) versions of the file. This feature is available only if the **Enable Viewer in Portal** setting is set to true.

  Note: Before comparing versions, the client must click the link to the file so it is open.

  Clients can do one of the following:

  – Select **Compare Overlay** to place one file on top of the other.
  – Select **Compare Side-By-Side** to place the document versions next to each other.

    See the **Using the Brava Viewer** chapter for compare and overlay options.

- You can compare two **different** documents side-by-side or overlay. Select the check boxes for the documents you want to compare in the **C** column. The Compare Files icon ( ) appears next to the **Thumbnail View** option. Click the icon to compare two different documents side by side or overlay.
- Click **Thumbnail View** to view the thumbnails for each document. The link changes to Detail View. Click **Detail View** to return to the default view.

</td></tr>
</table>

Option	Description
Fees	Lists any fees that have been paid.
History	Shows a history of the form from inception to the present time. From here you can view the date of an event, who created the event and what the actual event was.
Application	Displays the filled out form that was previously submitted.

Other Actions in the Reviews tab include:

- **Invite Others**: Clients can invite others to participate in the review process. Click **Invite Others** (Invite Others). A dialog box appears allowing the client to enter an email address and note to send with the invitation.

  Click **Invite** to send the email to the potential reviewer.

- **Cancel**: If clients have permission to do so, they can select **Cancel** (Cancel) to cancel the review process. To enable the cancel button in the Client Portal, the **Enable Cancel Button on Portal** setting in SIRE Web Center must be set to true. The name on this button can be formatted to whatever name you want. Select the **Cancel Button Caption** setting in SIRE Web Center to change the name.

Viewing Modified Files

Any modifications made to files appear in the Files or the Tasks list. Depending on the settings provided by the Administrator, you can either view the files in the Brava Viewer or in whatever format the file has been saved (pdf, doc, etc).

To view modifications made to files:

1. Select the link for the modified file from the Files or Tasks list. The file opens in the Brava viewer. Any markups made by the reviewer are shown on the file.

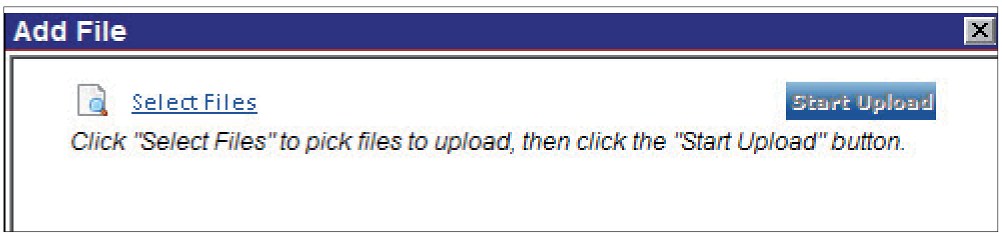
Note:	If the Brava viewer has not been enabled for the client, the file opens as a document (.doc, .pdf, etc.).

2. (*Brava viewer only*) Click the Compare Versions of this File icon ( ) to view versions either as an overlay or side-by-side.
   - To view as an overlay, click **Compare Overlay**. The different versions of the file are placed on top of each other.
   - To view side-by-side, click **Compare Side-by-Side**. The different versions of the file are placed next to each other.

If the client has permission, they can modify their source document, and then upload it to the form and send it back for review.

To upload a modified file:

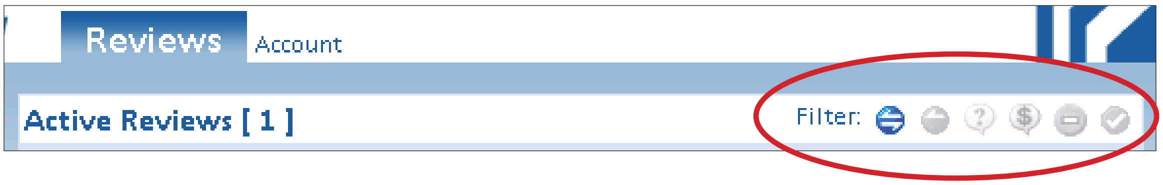
1. From the Reviews tab, click the **Files** option.
2. Select the **Revise File** link. The Add Files dialog box appears.



3. Click **Select Files** and select the file you want to upload.
4. Click **Start Upload**. The file is uploaded and appears in your file list.
5. Click **Continue** (Continue) to send the form with the revised file back to the site.
6. Click **OK** to confirm the submission.

Sorting Active Reviews

On the Reviews tab, there are filters located in the upper right-hand corner that can be used to find specific reviews by sorting them into categories.



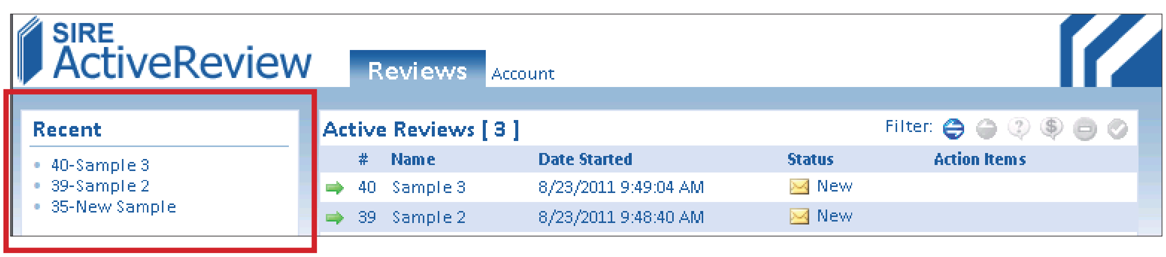
Select from one of the following options to perform a sort.

Icon	Functionality
	Displays non-canceled and non-complete reviews.
	Displays partially reviewed reviews.
	Displays reviews that need information.
	Displays reviews that need payment.
	Displays cancelled reviews.
	Displays completed reviews.

Viewing Recently Added or Accessed Active Reviews

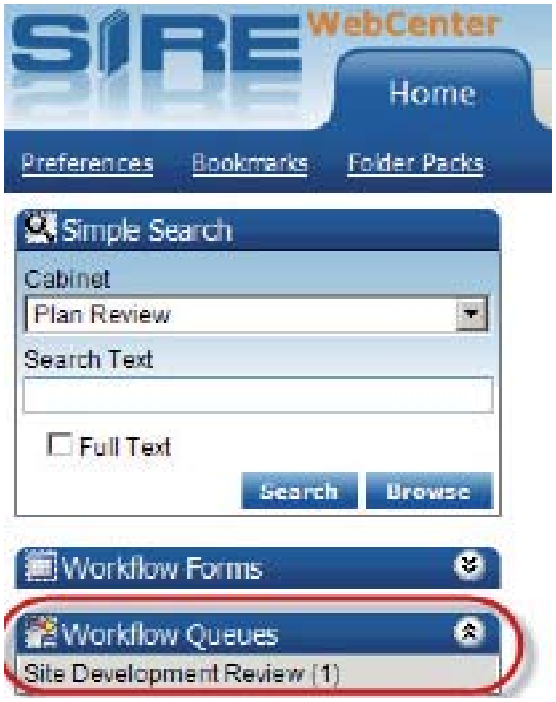
A client can easily locate and view a recently added or accessed review by looking in the **Recent** panel located in the upper left-hand corner of the page.

Locate the name of the review that is to be viewed in the Recent panel, and then click to open the review.



3 Using the Workflow Tab

The SIRE WebCenter allows you to view your workflow and perform several options on client-submitted forms. When you log in to the SIRE WebCenter, the Home tab appears and any forms that reside in your Workflow are listed in your Workflow Queue.



Accessing items in the Queue

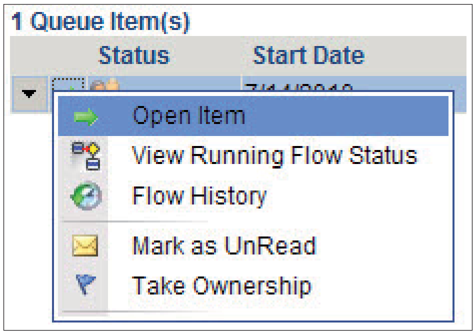
You can easily access items from the queue.

To access items in the queue:

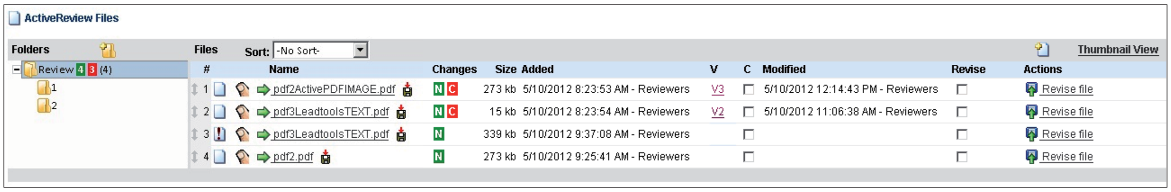
1. Select an item from the Workflow Queues section to open the Workflow tab. When the Workflow tab opens, all forms submitted by clients appear in the queue list.

Note:	If the forms do not appear in the queue list, you may need to select the Inbox folder to open the form(s).

2. Place your cursor on the form you want to review. A drop-down menu appears.



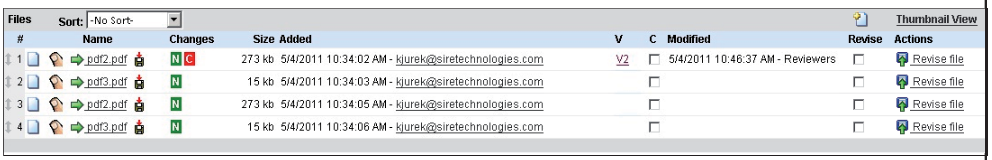
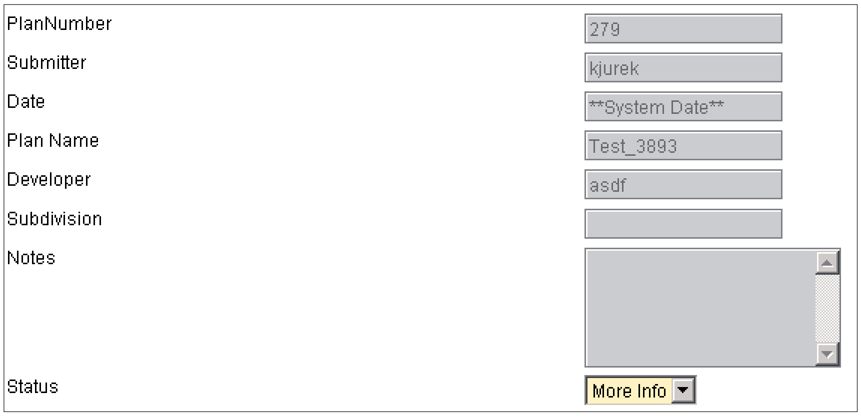
3. Select **Open Item**. The item you selected opens. Any files attached to the form appear in the Files list.

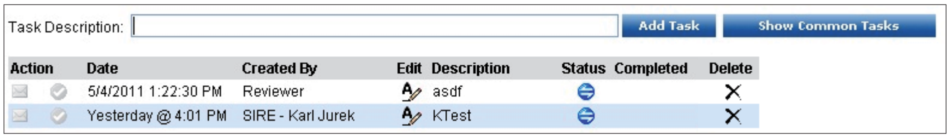


Working with an Item in the Queue

The tool bar at the top of the screen allows you to perform several actions on either the form or any documents linked to the form.

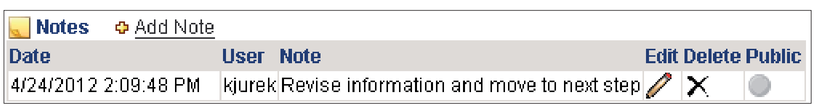
These actions include:

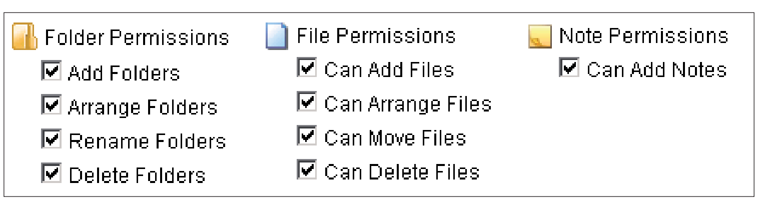
Option	Description
Files	Displays any files linked to the form. From here you can open the file in the Brava viewer (see **Using the Brava Viewer** chapter).  You can also view: • The name of the file • Whether any changes were made to the file:  = new,  = changes made • The file size, the date it was added and who added it • The version number • Two different files side-by-side or in overlay • The date of any modifications made on the file Click to place a check in the **Revise** check box to allow the client to revise the file in Active Review. You can also click the **Revise File** link to upload a new version of the file.
Application (Can be Named Differently)	Allows you to view the form.  On the bottom of this screen you have three status options: • **Accepted**. Indicates that the form has been accepted. • **Rejected**. Indicates that the form has been rejected. • **More Information**. Sends the form back to the client. They can then make any necessary changes and resubmit for review when complete.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Tasks</td><td>Allows you to view or create any tasks for the queue item.


To create a task, enter a task in the Task Description field and select Add Task.
Click Show Common Tasks to add tasks that are assigned on a regular basis. If common tasks do not exist, you can create them. To create a common task:

Click the Create a Common Task link.
Enter a Category in the Category field.
Enter a Reference ID in the Reference field.
Enter a description of the task in the Description field.
Enter a URL if applicable.
Click the Create Link. The common task is created.
Click Add Link to add the task to the task list for an item.

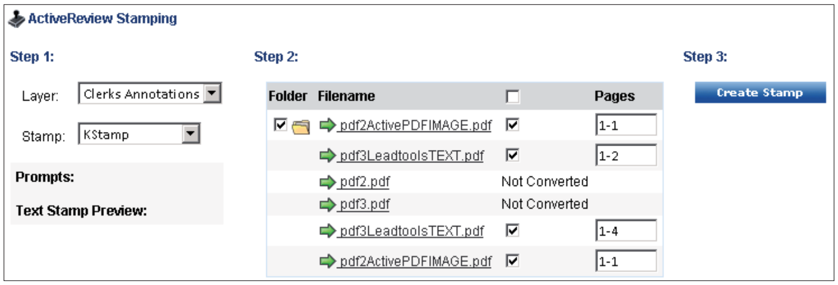
Once you have created tasks, click Hide Common Tasks to close the list of common tasks.</td></tr>
<tr><td>Notes</td><td>Allows you to view or create notes for the queue item.


To create a note, click the Add Note link. Enter your note in the text box, and then click Save. If you created a note, you will have the ability to edit or delete the note as needed. You can also set the note as Public which makes the note visible to applicants in the Active Review portal. Click the grey button to make the note public. It turns to a green check mark ( ).</td></tr>
<tr><td>Permissions</td><td>Allows you to set permissions for the client to do certain activities within Active Review.


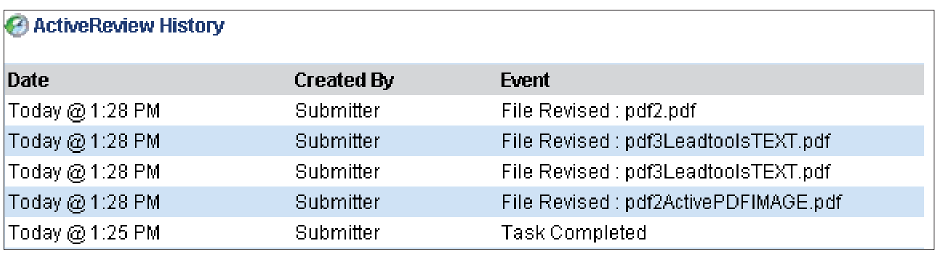
From here you can set:

Folder Permissions
File Permissions
Note Permissions
</td></tr>
<tr><td>Fees</td><td>Allows you to see any fees that have been assessed.</td></tr>
</table>

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Payments</td><td>Allows you to see any payments that have been made.</td></tr>
<tr><td>Stamps</td><td>Allows you to place a stamp on multiple pages in a document in one step.



To perform a multiple batch stamp:
1. Select a layer to which you want to apply the stamps from the Layer drop-down list.
2. Select the stamp you want to use from the Stamp drop-down list.
3. Either select the check box in the Folder column to activate all documents, or select the check box next to the document where you want the stamps placed. The number of pages in each document appears in the Pages column.
4. Type the page numbers where you want to place the stamp.
5. Click Create Stamp. The stamp you selected appears on the appropriate pages in the document.
Note: When viewing the pages in the Brava Viewer, but sure to select the correct layer.</td></tr>
<tr><td>History</td><td>Allows you to see the history of this form from inception to the current date.



</td></tr>
<tr><td>Email Submitter</td><td>Allows you to send an email to the submitter of the form.</td></tr>
</table>

Once you have performed any necessary tasks on an item in your queue, select the **Application** button.

Select a routing option (see **Application** in table above) from the bottom of the form, and then click one of the following options at the bottom of the screen:

- **Take Ownership**. Allows you to take ownership of the form. The button changes to Relinquish Ownership allowing you to give ownership back to the client.
- **Reset**. Resets the form to it's original state.
- **Check Spelling**. Runs a spell check on the form.
- **Save & Continue**. Saves any information modified for the form (files, notes, tasks, etc.) and sends the form back to the Client.
- **Save & Next Item**. Saves the item and opens the next item in the Workflow Queue.

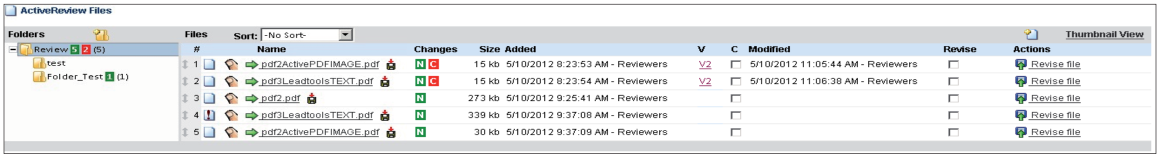
Note:	When the workflow process is complete, the files are placed in SIRE EDMS for storage and management. Once placed here, SIRE EDMS functionality is available such as retention, searching, and maintenance.

4 Using the Brava Viewer

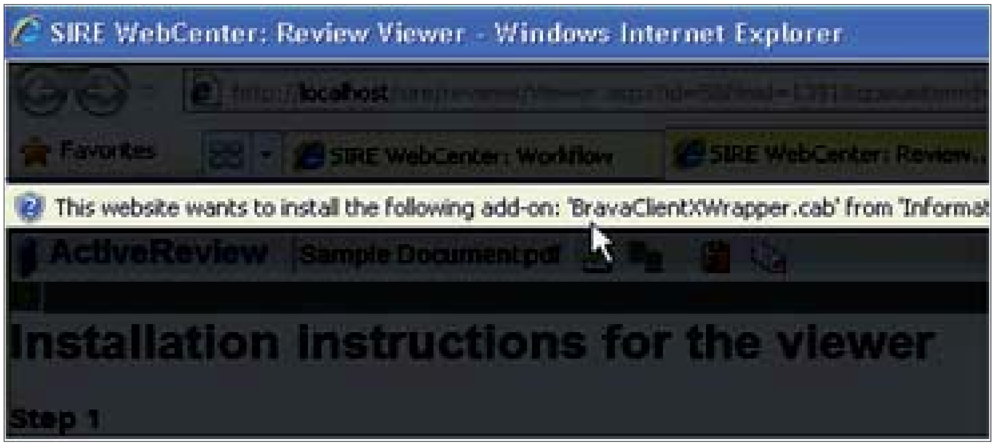
The Brava Viewer enables you to electronically mark up a document, and then send it back to a client for review.

Opening the Brava Viewer

1. Access the viewer by selecting a link for a document listed in your workflow. If this is the first time you are using the Brava Viewer, you will need to download the Brava ActiveX control. If this is not the fist time the Brava Viewer has been used, skip steps 2 and 3.



2. Click on the yellow toolbar and select **Install**.



3. If a Security dialog box appears, click **Install**.

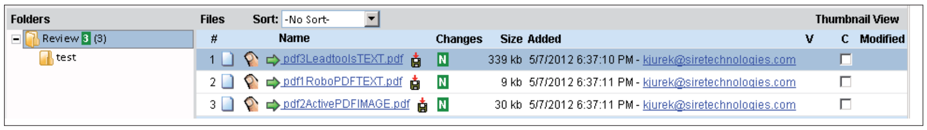
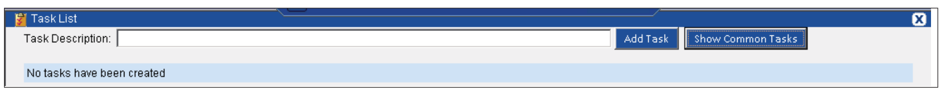
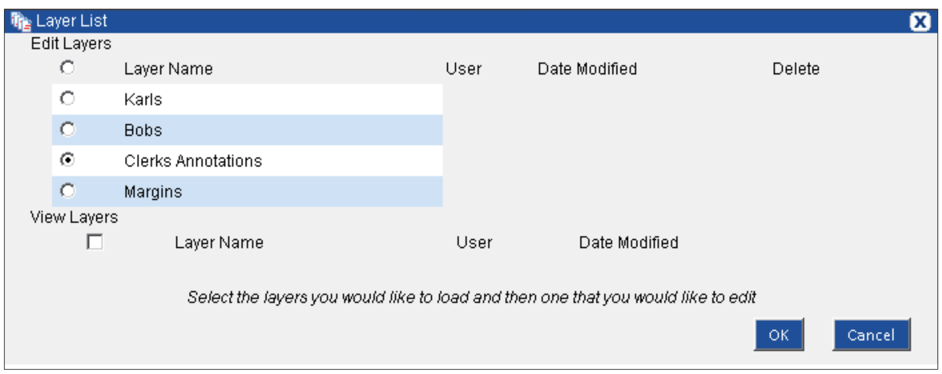
The Brava Interface

Before using the Brava interface, familiarize yourself with the toolbars and options available to you.

Active Review File Options

The following file options appear across the top of the viewer:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Document Version

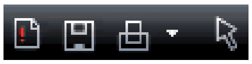
</td><td>Lists the versions of the document displayed in the viewer.</td></tr>
<tr><td>Open File List
</td><td>Opens a list of files attached to a review.

</td></tr>
<tr><td>Compare Versions of this File
</td><td>Allows you to compare the different versions of the file if any other versions exist. From here you have the option to view files as an overlay or side-by-side.</td></tr>
<tr><td>Show Tasks
</td><td>Displays any tasks related to this review. You can also add tasks or view any common tasks.

</td></tr>
<tr><td>Markup Layers
</td><td>Opens the layer list from which you can select the layer you want to edit. Upon clicking OK, other Brava toolbars appear. See the following sections for a description of each toolbar.

</td></tr>
</table>

Brava Toolbars

There are several toolbars available that allow you to mark up and view the document as needed.

General Options

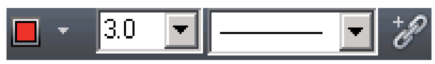
General options allow you to save, print and select elements within a document.

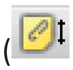
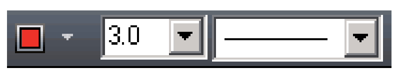
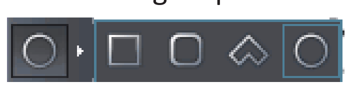


Option	Description
Markup 	Allows you to access commands allowing you to mark up files. From here you can create a new markup file, open a markup for edit or review and save a markup file.
Markup Save 	Allows you to save the current markup to the markup directory.
Print 	Allows you to print the markup document. Upon selection, several options appear: • **Print**: Contains standard print options. Select the appropriate options and click Print to print the document. • **Print Region**: Allows you to print one area of the document. When you select this option, you are able to draw a rectangle around the region of the document you want to print. Select your region and then click **Print** from the print dialog box. • **Watermark/Banners**: Select this option to add watermarks to your document. A listing of possible locations appears. Select a location and then type the wording you want to appear in the watermark. Click **OK**. The watermark appears on the document.
Select 	Allows you to select text in a document to copy.

Markup Options

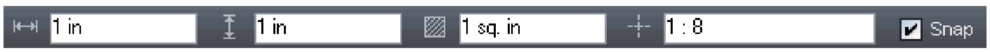
Depending on which option you choose, a toolbar appears allowing you to annotate, redact, measure and publish information.

Option	Description
Annotate Options	
Select 	Allows you to select an intelligent object and activate changemarks.
Arrow Pointer 	Allows you to draw an arrow on the document. You can then click and drag the arrow to the appropriate location within the document. Format the arrow using the formatting options available on the Markup Properties toolbar. 
Text 	Allows you to add text to the document. Upon selecting the icon, a rectangle appears. Size the rectangle to the height you want, and then enter your text. You can then drag the text to the appropriate location within the document. Format the text using the formatting options available on the Markup Properties toolbar. 
Image 	Allows you to add images (.jpg, .bmp or .png) to the document. Click the icon, and then click **Browse** from the Markup Properties toolbar to select the image you want to insert. The image is placed into the document. You can resize the image and move it to the location you want within the document. Format the signature using the formatting options available on the Markup Properties toolbar. 
Add Stamp 	Allows you to add a stamp template to the document. Note that this icon is inactive unless Markup Templates have been created. The stamp template is a group of markup entities that have been defined as a single unit. All elements of the template are resized and moves as one entity and cannot be edited otherwise. Color, content, and other elements are defined by the author when a stamp template is created and saved.

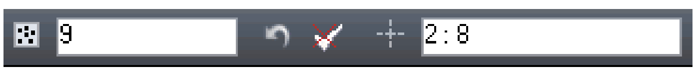
Option	Description
Annotate Options (cont.)	
Changemarks 	Allows you to add more information about a markup you made in the document. You can place the change markup where it's needed in the document and then add any applicable text. Click the arrow to view more changemark options.  You can review all changemarks by selecting the Markup icon () from the tabs on the sidebar.
Cloud 	Allows you to add either cloud or polygon shapes to the document. Use these shapes to highlight a specific area of the document. Click the arrow to view more cloud options. 
Sketch 	Allows you to draw freehand shapes. You can select either shapes or filled in polygons. Select the line type and/or the fill for the polygons from the Markup Properties toolbar. Click the arrow to view more sketch options.  You can format the sketch using the options available on the Markup Properties toolbar. 
Line 	Allows you to draw one of several types of lines in the document. Select the arrow to choose the line type you want and use it to mark up the document. 
Rectangle 	Allows you to draw rectangles and other shapes within the document. Click the arrow to view more rectangle options:  You can format the rectangle tool using the options available on the Markup Properties toolbar. 
Strikeout 	Allows you to strikeout, highlight and underline text within the document. Click the arrow to view more strikeout options. 

Option	Description
Redact Options	
Redact Area	Allows you to place one or more rectangular covers over sensitive or confidential areas of a document to block certain portions from being viewed.
Redact Text	Allows you to highlight and redact specific lines of text.
Allow Area (inside redaction)	Allows you to cut away areas of an unpublished redacted rectangle that you would like to reveal and make visible.
Redact Privacy Info	Allows you to quickly locate and redact sensitive information commonly found in documents and forms.
Find Redact	Allows you to run a command that finds and redacts multiple instances of a common word or phrase simultaneously.
Find Redact From/To	Similar to Find and Redact, this allows you to specify a range of text to redact by entering a start and end search pattern.
Redact Using Script(s)/ List(s)	Allows you to run a command to find and redact a predefined list of phrases or redaction scripts in one action.
Redact Page	Allows you to redact an entire page or specified pages.
Measure Options	
Measure Line	Allows you to draw a line on the document and receive measurement values for that line. The values display in the Markup Properties toolbar.  Select the **Snap** check box to turn off the snap-to-grid option.
Measure Polyline	Allows you to free-draw a shape and then receive measurement values for that shape. The values display in the Markup Properties toolbar.  Select the **Snap** check box to turn off the snap-to-grid option.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td colspan="2">Measure Options (cont.)</td></tr>
<tr><td>Measure Polygon
</td><td>Allows you to draw a polygon on the document and then receive measurement values for that polygon. The values display in the Markup Properties toolbar.


Select the Snap check box to turn off the snap-to-grid option.</td></tr>
<tr><td>Measure Rectangle
</td><td>Allows you to draw a rectangle on the document and then receive measurement values for that rectangle. The values display in the Markup Properties toolbar.


Select the Snap check box to turn off the snap-to-grid option.</td></tr>
<tr><td>Measure Circle
</td><td>Allows you to draw a circle on the document and then receive measurements values for that circle. The values display in the Markup Properties toolbar.


Select the Snap check box to turn off the snap-to-grid option.</td></tr>
<tr><td>Measure Count
</td><td>Allows you to count items on a document. Each time you click the mouse on an item, a check mark is placed on the document and a tally is kept in the Markup Properties toolbar.

</td></tr>
<tr><td colspan="2">Publish Options</td></tr>
<tr><td colspan="2">There are several publish options.


Select the option you want in order to publish your document. Options include:

Publish to PDF: This option publishes the current file (including markups) to a PDF format.
Publish to TIFF: This option publishes the current file (including markups) to a TIFF format.
Publish to CSF: This option publishes the current file to a secure CSF format with encrypted visual rights. CSF is a neutral 2D format that is a replica of the source file and includes images, graphics, layout, and more. CSF files published with Brava Enterprise can be opened in Brava Desktop or the free Brava Reader.
Save Current View as JPG: This option saves the current view as a JPG file. This captures the display window as a screen capture and includes all visible elements (markup entities, magnifier window, measurement indications, etc.).
</td></tr>
</table>

View Options

View options are located on the bottom of the screen. These options allow you to zoom in or out on a document, magnify areas of a document and rotate documents.

Option	Description
Rotate 90 	Allows you to rotate the image in 90 degree clockwise increments.
Fit All 	Select Fit All to zoom the image to 100% so the full image displays in the Brava Viewer.
Fit Width 	Select Fit Width so that the entire width of the image appears in the window.
Zoom In/ Out Slider 	Move the slider to zoom in or out on the document.
Pan/Zoom 	Allows you to maneuver in an image when you are zoomed in.
Zoom Window 	Allows you to zoom in and out (hold down the right mouse button and move the mouse up and/or down) or to zoom to an area of the document by dragging a box around the desired display area.
Magnifier 	Allows you to magnify portions of the document as you drag the mouse over text within the document.

Other Options

There are other options available that allow you to access help, locate items within documents and view other pages of the document.

Option	Description
Brava Help 	Launches the Brava Help files.
Search Text 	Allows you to search within the document for text and images. You can use wildcards and macros. You can also search up, down, and match cases.
Change Background Color 	Allows you to change the background color of file types with transparent background colors, such as monochrome raster or vector types to black, white, or gray.

Option	Description
Page Control	Allows you to navigate through the pages of your documents. Use the arrows to move forward and backward through the document.

Task Pane

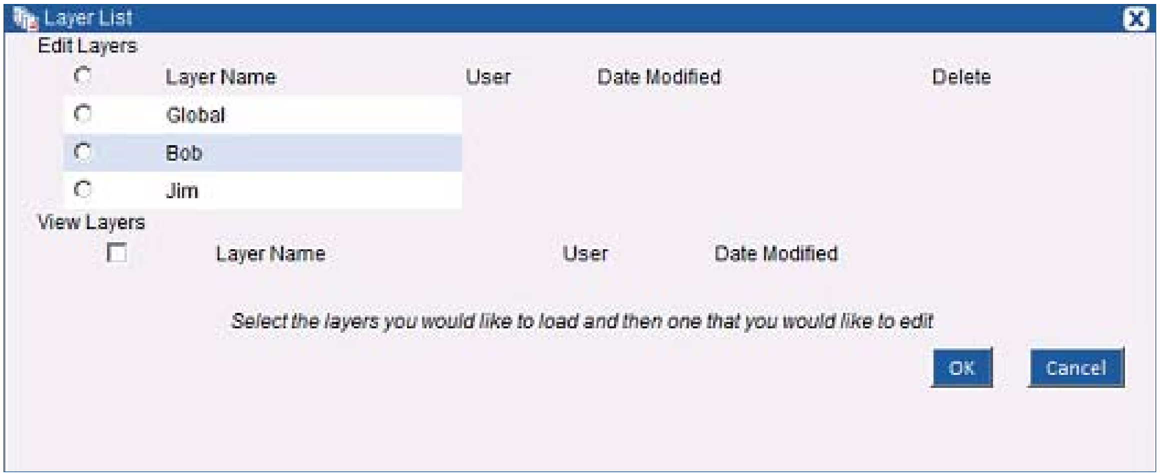
The Task Pane can be toggled open or closed by selecting the pane arrow ( ) located on the right side of the Brava viewing window. The Task pane includes the following options:

Option	Description
Page Thumbnails	This panel shows the pages of the currently opened file as small thumbnail images that can be clicked. An exclamation point appears on pages containing markups.
Bookmarks	This panel lists any internal bookmarks contained in the document being viewed. You can click a bookmark to go to that location in the document.
Changemarks	This panel lists changemarks made in the document. You can view changemarks by title, author, or date. You can also copy changemarks and then paste it into a Microsoft Word Document.
Verify Redaction Panel	This panel allows you to run the verify tool on a redacted document. This manually checks and adjusts the accuracy of each redacted area that has been set on the document before you finalize the redaction through publishing.
Takeoff Panel	If a markup layer contains takeoff entities, they can be reviewed in the measurement takeoff panel. The takeoff panel will contain a list of categories that have been defined for the drawing along with the accumulated values for those measurements as area, length, or count.

Marking Up Documents with the Brava Viewer

Documents can be marked up with the markup options described in the Brava Viewer markup Toolbar as described in the table above.

1. Click **Open Markup Layers** ( ). The Layer List appears with a list of any existing layers.



2. Select the applicable layer from the Edit Layers list, and then click **OK**. The Brava Markup toolbar appears.

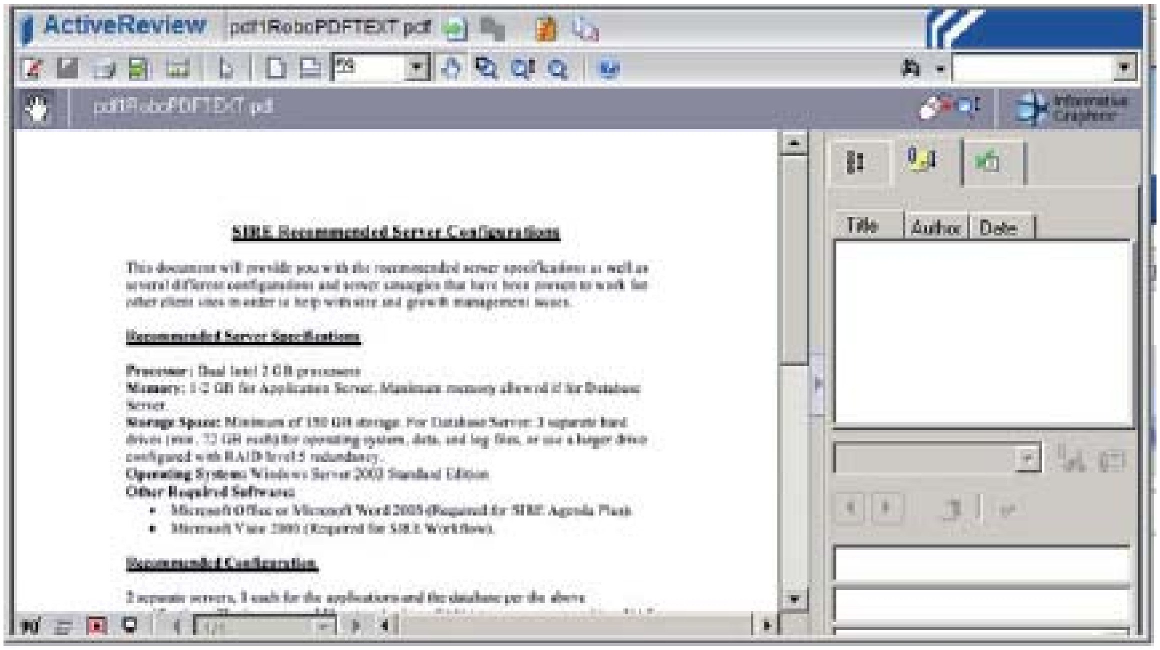
3. Markup the document as needed.

4. Upon completion, click **Markup Save** ( ) to Save the changes, and then close the Brava Viewer.

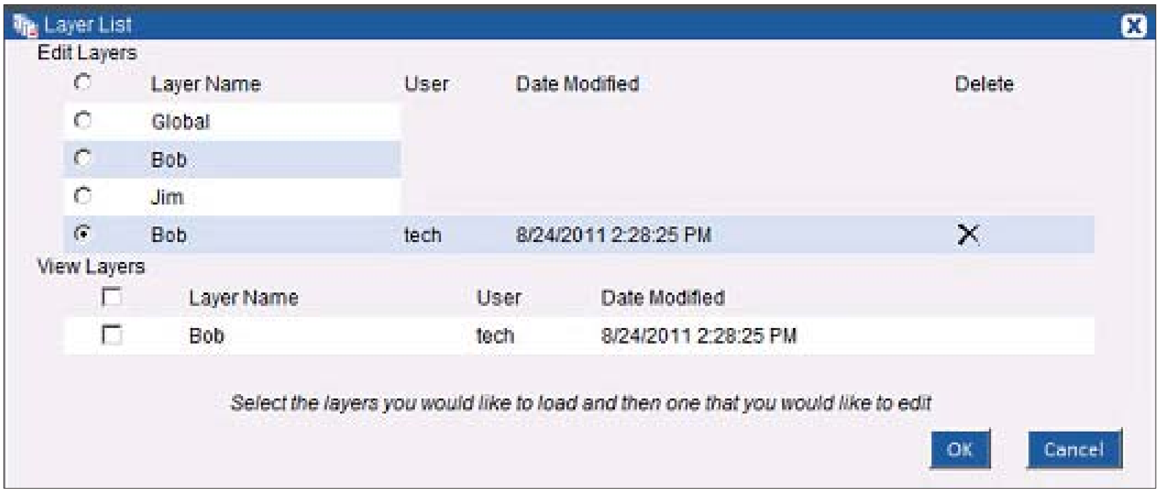
Deleting a Layer

Users have the capability to delete a layer and all of its associated mark-ups that have been placed on a document.

1. Access the viewer by clicking the link of a document listed in your workflow. The viewer appears with the document displayed. If the document is already open skip to step 2.



2. Click **Open Markup Layers** ( ). The Layer List appears with a list of any existing layers.



3. Select the applicable layer from the Edit Layers list, and then click the delete ( ) icon. All of the mark-ups associated with that layer are removed from the document.

Sending Markups Back to the Client

Once the markups have been saved, you can send them back to the client for review.

1. From within the Workflow click the **Application** Button. The form appears.

2. Scroll to the bottom of the form, and select the **More Information** routing option.
3. From the bottom of the screen, click **Save & Continue**. The form is sent back to the client with the marked up file attached.

Comparing Documents

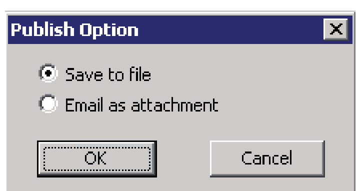
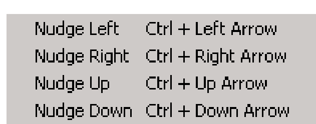
You can compare documents in the Brava Viewer, either side-by-side or as an overlay. To access the compare documents feature:

- Select a version of a document from the Reviews > Files option in Web Center (if more than one version of a document exists).
- Select two different documents by placing check marks in the **C** column in Reviews > Files option and Web Center, and then clicking the **Compare Files** icon.

To compare files in the Brava Viewer:

1. Open the files you want to compare as described above. The Brava Viewer appears with both documents displayed.
2. Use the toolbar at the bottom of the Viewer to view the document. Options include:

Option	Description
Overlay 	Select this option to view side-by-side documents in overlay mode instead.
Overlay Differences 	Select this option to view the differences between the documents when you are in overlay mode.

Option	Description
Side-By-Side	Select this option to view overlay documents in side-by-side mode instead.
Text Comparison	Select this option to view a comparison of the text in each document. If there are no textual differences, a message box appears indicating that there are no differences in text.
Open File (only)	Select this option to open only a single file.
Compare File (only)	Select this option to return to compare file mode.
Additions	Select this option to highlight any additions made to the document in green.
Deletions	Select this option to highlight any deletions made from the document in red.
Unchanged	Select this option to view any text that has not changed.
Dynamic Changes	Slide the slider to view the changes in grey on the document.
Text Compare Report	Select this option to either save the documents to file or to email as an attachment. 
Nudge Alignments	Select this option to nudge the alignment of the documents. You have the following options to choose from: 

5 Administrative Tasks

The Reviews tab in the SIRE WebCenter allows you to perform several administrative functions. These functions include:

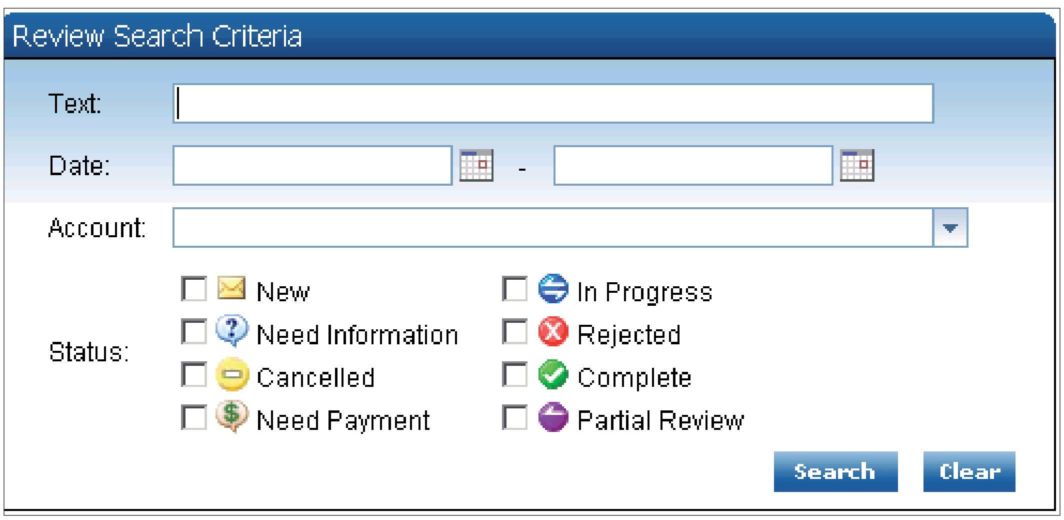
- Searching for information in reviews
- Maintaining Active Review accounts
- Setting user permissions

Administrators also have the ability to install the following applications:

- Brava viewer
- Net-It application

Searching for Information in Submitted Reviews

Select the Reviews tab to perform a search for information on any reviews submitted to the SIRE WebCenter.



To perform a search:

1. Enter any of the following information:

   - **Text**. Enter text that appears in the review you are searching for.
   - **Date**. Enter a date range to locate reviews submitted in a specific time period.
   - **Account**. Use the drop-down arrow to select the account that submitted the review.
   - **Status**. Select the status of the review from the options available. Options include New, Need Information, Cancelled, Need Payment, In Progress, Rejected Complete, or Partial Review.

2. Click **Search**. Any reviews that meet the criteria you established appear in the Reviews tab.

3. Click **Refine Search** to change your search parameters if necessary.

Maintaining Active Review Accounts

The Accounts tab allows you to maintain information for accounts entered into Active Review.

From the Accounts tab you can:

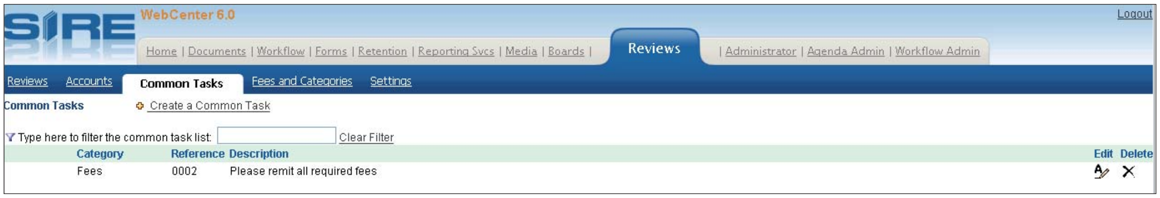
- Select **View Reviews** to access any reviews submitted by an account. Any submitted reviews appear on the Reviews tab.

Note:	The reviews do not open in Workflow, so there is no Workflow functionality on this tab. You can see any submitted item regardless of whether it is sitting with the client or not. When viewing reviews in the Workflow tab, you can only see items that are actually in your queue.

- Select **Reset** to request the password for the account be changed. A dialog box appears confirming that an email will be sent to the client with a new password.

Working with Common Tasks

The Reviews > Common Tasks tab allows you to view, create, edit, and delete Common Tasks that will be used in Workflow. See the Working with an Item in the Queue section of this manual for details on working with Common Tasks from within the Workflow.



Creating a Common Task

To create a common task:

1. Click the **Create a Common Task** link.
2. Enter a Category in the **Category** field.
3. Enter a Reference ID in the **Reference** field.
4. Enter a description of the task in the **Description** field.
5. Enter a URL if applicable.
6. Click the **Create** Link. The common task is created.

Editing Common Tasks

To edit common tasks:

1. Click the **Edit** ( ) icon to the right of the Common Task that needs to be edited. The fields of the Common Task become editable.
2. Make any necessary changes to the Common Task and click the **Save** ( ) icon. All of the changes are saved and you are returned to the main Common Tasks screen.

Deleting Common Tasks

To delete common tasks:

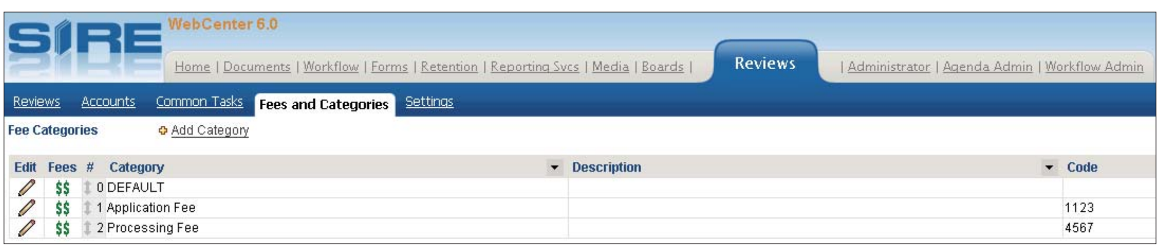
1. Click the **Delete** ( ) icon to the right of the Common Task that needs to be deleted. A message appears asking if you are sure you want to delete the Common Task.
2. Click **OK**. The Common Task is deleted and you are returned to the main Common Tasks page.

Filtering Common Tasks

Common tasks can be filtered by entering anything that is contained within the Category, Reference, or Description fields of the Common Tasks in the Filter field. Only Common Tasks containing the data added to the Filter field are displayed.

Fees and Categories

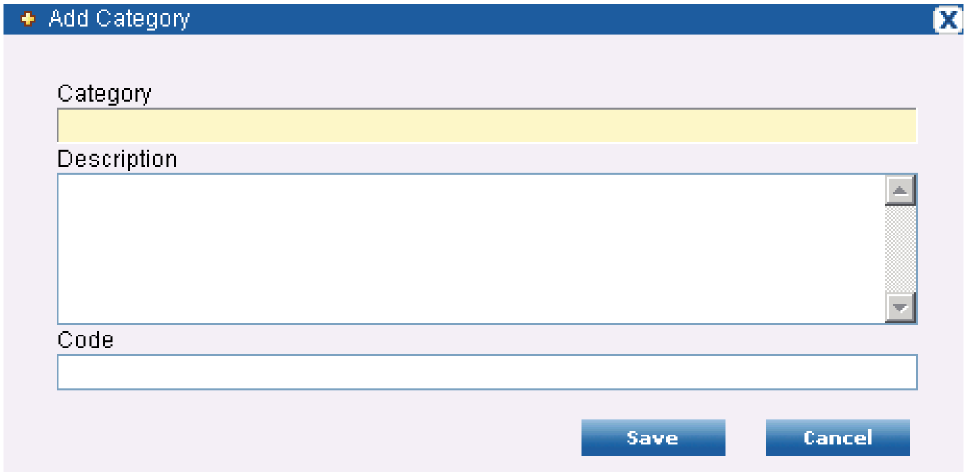
The Fees and Categories tab allows you to determine the fee categories and their specific fees to be used within Active Review.



Adding a Fee Category

To add a fee category:

1. Click the **Add Category** link. The Add Category window appears.



2. Enter the category name in the **Category** field.

3. (*Optional*) Enter a description in the **Description** field.

4. (*Optional*) Enter a code in the **Code** field.

5. Click **Save**. The newly created Fee Category is listed on the Fee Categories page.

Editing a Fee Category

To edit a fee category:

1. Click the **Edit** icon ( ) to the left of the Fee Category you want to edit. The Edit Category window opens.

2. Make any necessary changes to the **Category**, **Description**, and **Code** fields.

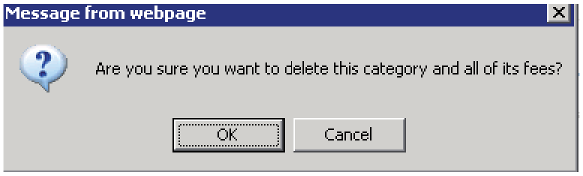
3. Click **Save**.

Deleting a Fee Category

To delete a fee category:

1. Click the **Delete** icon ( )to the right of the Fee Category you want to delete.

A dialog box appears asking if you really want to delete the Category.



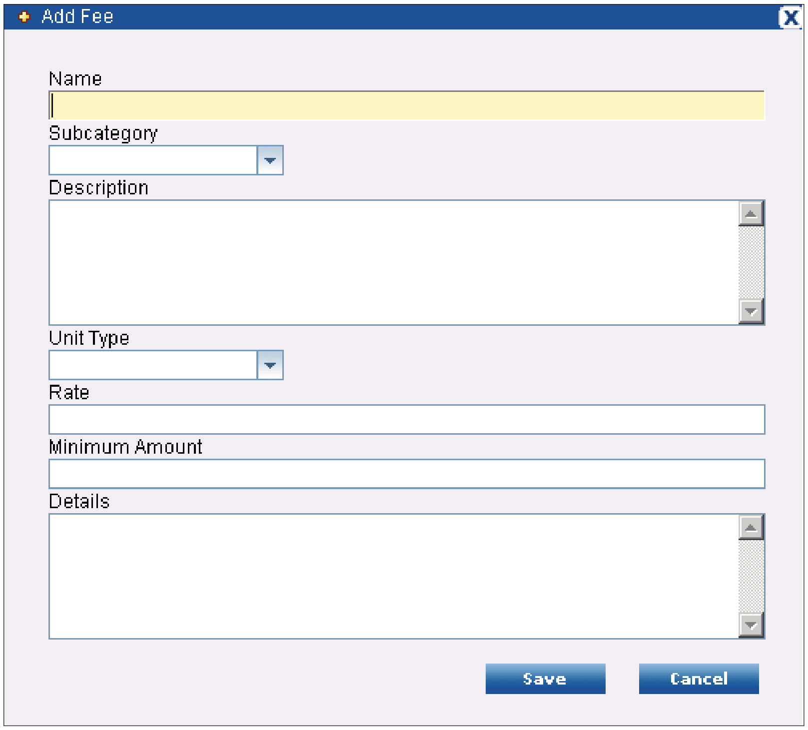
2. Click **OK**. The category is removed from the Fee Categories page.

Adding Fees to a Fee Category

To add fees to a fee category:

1. Click the **Edit Fees** icon ( ) to the left of the Fee Category to which you want to add a fee. The Fees page appears.

2. Click the **Add Fee** link. The Add Fee window appears.



3. Enter a name for the fee in the **Name** field.

4. Choose or enter a subcategory in the Subcategory field. Each time a new subcategory is added to a fee, it is made available to choose from the drop-down list of other fees.

5. Enter a description in the **Description** field.

6. Choose a unit type from the **Unit Type** drop-down field. The choices for this field can be configured by the Administrator on the Settings page.

7. Enter a rate in the **Rate** field.

8. Enter a minimum amount in the **Minimum Amount** field.

9. Enter any necessary details in the **Details** field.

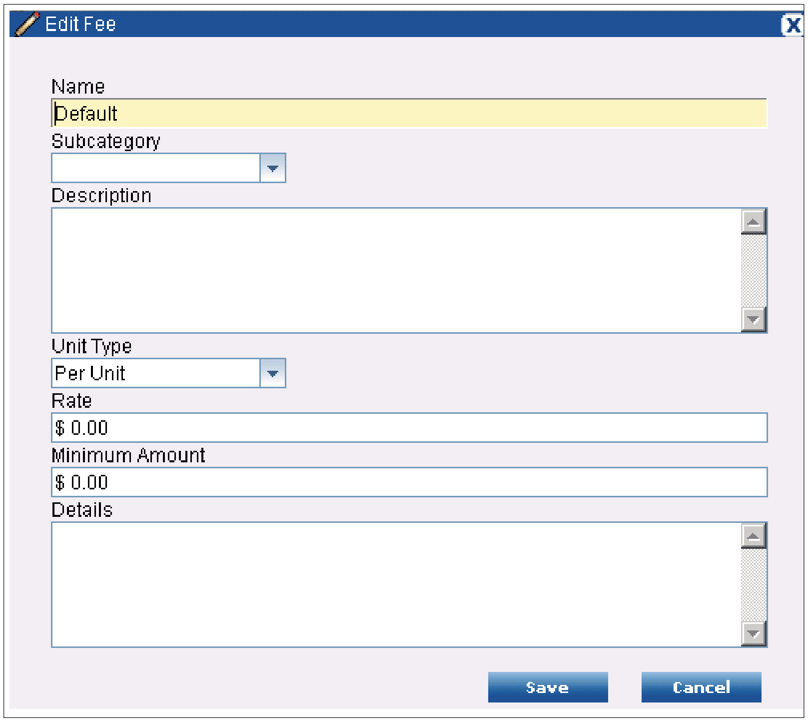
10. Click **Save**. The new fee is saved and appears on the Fees page.

Editing a Fee

To edit a fee:

1. Click the **Edit Fees** icon ($$) to the left of the Fee Category that contains the fee to be edited. The Fees page appears.

2. Click the **Edit Fee** icon ( ). The Edit Fee window appears.



3. Make any necessary changes to the Name, Subcategory, Description, Unit Type, Rate, Minimum Amount, and Details fields.

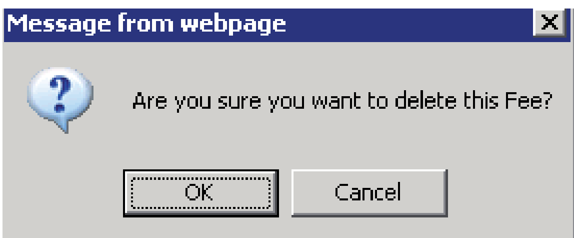
4. Click **Save**.

Deleting a Fee

To delete fees:

1. Click the **Edit Fees** icon ( ) to the left of the category that contains the fee to be deleted The Fees page will open.

2. Click the **Delete** icon ( ) to the right of the fee to be deleted. A dialog box appears asking if you want to delete the fee.



3. Click **OK**. The fee is removed from the Fees page.

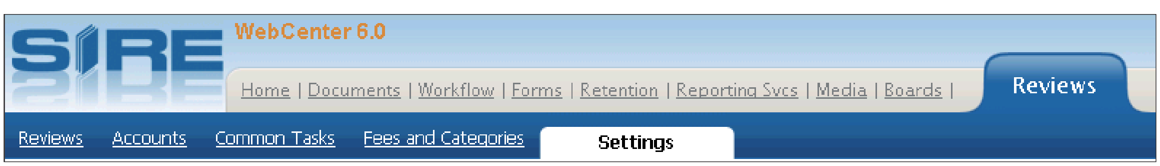
Setting User Permissions

User permission are set up from the Settings page. These permissions apply to the Active Review application and allow you to set up settings for users and server access.

To set up user permissions:

1. Log in to the SIRE WebCenter, and then select the Reviews tab.

2. Click the Settings link under the Reviews tab. The current list of settings appears. The following table provides a list of the settings and a description for each.



Setting	Description
Cancel Button Caption	Allows you to change the name of the Cancel button on the Active Review portal.
Cancel Prompt	Allows you to configure the message that appears on the cancel message when you cancel a review.
Continue Button Caption	Allows you to change the caption on the Continue action in Active Review for an item that has been submitted to the client for more information. Enter the name you want for the button in the Setting Value text box.
Default Folder Structure for Review	This setting is used to establish folder layers to organize files. Various users or steps can place files within various folders to organize files associated with an application. Once these folders are set up, users can see these folders in the workflow queue, place files within these folders and view files contained in the folders. To create the folders: 1. Click the **Add Folder** icon. 2. Enter the folder name in the User Prompt screen. 3. Once a folder is added, there are various functions available, such as delete, move up, and move down.
Default Tab in Portal (0=Notes, 1=Tasks, 2=Files, 3=Fees, 4=History)	Denotes the default tab the client sees when they are in the portal.
Default Tab in Workflow (0=Files, 1= Form, 2=Tasks,3=Notes)	Denotes the default tab a user sees when they are in the Workflow tab.
Enable cancel button in portal	Set to True/On/Yes to add a cancel button to the Reviews tab in the Active Review portal. Set to False/Off/No to remove the button.
Enable Preview button in Forms	Enables the Preview button at the bottom of the form being submitted through the portal.
Enable Viewer in Portal	Set to True/On/Yes to allow clients to see markups on documents using the Brava Viewer. Set to False/Off/No to allow the document to open in it's normal format (.doc, .pdf, etc.) only.
External URL	Set the external URL for access into the Active Review portal.
External URL to server	This setting is used only when Net-It is used. Enter the path to the server where Net-It was installed in the Setting Value text box.

Setting	Description
Fees: Unit Types	Lists the options that are available when configuring the Unit Types of a Fee Category.
Files types to allow as attachments	Determine which file types to allow as attachments. Enter each file type separated by a comma. Examples include pdf, tif, dwg, etc.
Form Tab Name in Workflow	Denotes the name of the Form Tab in the workflow. Application is commonly used.
Full Server license name	This is the name of the license from Informative Graphics. Use the default value unless otherwise instructed by SIRE Technologies.
List of available Forms	Enter the forms that the client can access to enter information and then submit for review.
List of forms that don’t require file uploads	Enter the forms that do not require a file upload before submitting for review.
Organization Name	Enter the name of the organization to which the client is logging in to submit a form. The organization name appears on the login screen.
Path to SIRE APP ATTACHMENTS	This path remains blank unless the viewer server resides on a different machine.
Payment Configuration	Used to configure payments taken by credit card.
Publishing Server URL	Enter the name of the server for publishing the marked up files.
Publishing: IP Address of Application Server	Enter an IP address for an application server if there are multiple IP addresses on the server.
Publishing: Port of Application Server	Enter the port for the application server used for publishing marked up files.
Publishing: Working Folder	Enter the path for the working folder for marked up files. The path must be to a shared folder.
Read-Only server license name	Enter the name for the read only server license.
Read-Only watermark text	Enter the text to appear as a watermark on read-only files that are uploaded to the server.
Require email verification	Set to True/On/Yes to require email verification when a client logs in to Active Review. Otherwise, set to False/Off/No.
Server timeout	Enter the number of minutes before the server times out.

Setting	Description
Stamping: Configuration	Select this option to create a stamp template to use for stamping purposes. You can create any stamp you want. Upon completion, save and name the template for use with the Stamping and Batch Stamping options in Web Center and Brava Viewer.
Stamping: Stamp Path	Specify the path where the stamp templates will reside on your server.
Successful form submission message	Denotes the message that is displayed to the submitter of a form when it has successfully been submitted.
Task List Print: Footer	Enter a value to print as the footer for the task list.
Task List Print: Header	Enter a value to print as the header for the task list.
URL to server	Enter the URL path to the server.
Working path for viewer markup	Enter the path to the directory in which Brava viewer markups are stored.

Installing the Brava Viewer

Perform the following steps to install the Brava Viewer:

1. Follow the instructions included with the installation package to install Brava on the server.
2. Ensure that the current Brava license is included in the following folders:
   - LicenseServer
   - JobProcessor
3. Set the following Brava services to logon as Administrator:
   - Brava! Enterprise .Net JobProcessor
   - Brava! Enterprise .Net License Server
   - Brava! Enterprise .Net Server
4. Test the Brava application by accessing http://[server name]/bravatest.

Installing the Net-It Application

Net-It is an application that must be installed only if the   setting on the Review tab is set to false. This application allows the client to view documents when the Brava Viewer is disabled.

Perform the following steps to install Net-It:

1. Follow the instructions included with the installation package to install Net-It on a server separate from the application server.
2. Ensure that the current Net-It license is placed in the following folders:
   - JobProcessor,
   - IGCWriter4.0Update
   - ModelPressPublisher.
3. Set the following Net-It services to logon as Administrator:
   - Net-It Enterprise .Net JobProcessor
   - Net-It Enterprise .net QueueServer
4. Ensure that the IIS anonymous access user account for QueueServer is set to Administrator.
5. Ensure that a share folder is set up on the server where Net-It is installed. Enter this path in the Publishing Working Folder (must be a Share) setting on the Settings tab.