In this lesson we'll demonstrate how to successfully initiate the peer review process. This is done in two steps. First you have to set up the document to be reviewed. This step converts the document or sections into a special review PDF file. Second, you have to enable the Annotations feature for the document such that comments can be left on it by other individuals. It is important to note that only a project lead is able to start the peer review process. If it has been a while since you were in ePlanning and need a refresher we recommend that review the online module called Account Creation and ePlanning Navigation. You can just jump to the lessons on logging in and navigating around.

To begin, now insure that you are operating within the ePlanning Webtop application. Let's navigate to My Authoring Tasks located in the Navigation pane. Select the project that you wish to generate a peer review for, using the drop-down menu. If you have multiple documents associated with your project you can choose a specific document for review using one of the filters in the drop-down menu.

Once you have selected the desired document you can choose specific sections to have reviewed or you can have the whole document reviewed. This can be done by checking the boxes next to the sections you wish to have reviewed. In this case I'm going to select the very top box just to select all of the sections. After checking the boxes next to the desired sections you will notice that several of the buttons at the bottom of the screen illuminate allowing you to ultimately select the Create Peer Review button.

Selecting the Create Peer Review option will open a new window with the Create Review Package form. This form has several fields that must be entered, which will affect the review. First off, insure that in the Review Type drop-down box you have selected Peer Review. In the Review Title enter a unique name for your review package. Avoid using backslash or forward slashes in your review package name as well as any other special characters. Inside the Selected Documents field you will find all of the sections you chose to incorporate into the peer review.

Down below we have the Mandatory Reviewers and Additional Reviewers fields. Both of these fields allow you to add reviewers for the review package. You are only required to complete the Mandatory Reviewers field. Select the Add button next to the dialog box. This brings forth the User Chooser form. You may select a variety of individuals, both from inside as well as outside of the BLM. For example, if I had a colleague at the Park Service who was very familiar with the project I could type in their e-mail address and they would receive an e-mail with the review PDF attached to that item from which they can comment on that PDF. However for demonstration purposes we will choose a BLM user who has ePlanning access. Insure that the ePlanning User option is selected in the User Type field. Next, in the field next to the User Group Name, type in the last name of the person you wish to find and click on the Search button. To add the reviewer that you are looking for, click the Select link right next to the person's name.

Next up, let's go ahead and choose a due date by clicking on the Calendar button to the right of the Due Date field and clicking on the desired date.

If you wish to add an attachment, the document must be located within the ePlanning Webtop Content Manager. This is best done by uploading files using the Import feature in Webtop to bring it into the Project folder. If it is not within the Project folder you will not be able to find the document to attach.

The very last field we have is an Additional Instructions box whereby you can choose to add additional messages or instructions to all of your reviewers in this box.

When you have completed all the required fields, click on the Finish button in the bottom right corner to generate and create your review package and initiate the document review workflow.

When you create the review package, a workflow process starts within the ePlanning system to ultimately help you send your review document to your reviewers. Let's start here by going to our Inbox in Webtop.

The first step in the workflow is to enable comments in the PDF file that was created in the review package. The person who generated the review package, typically the project lead, will get a task in their own Inbox to enable annotations.

In order to enable commenting you must first navigate to the PDF document. Here are the steps for doing that: Click on the Enable Annotations task in the Inbox. Here you'll have some background information with instructions in this very top section of this message. Down below, click on the folder named for the review package that you created to open it. Check the box to select the PDF version of the document that you just created, and then click the Edit button on the toolbar as if you were opening up the document in Arbortext.

The Adobe Acrobat Professional application will launch. In here, open up the Comments menu and choose the option titled Enable for Commenting and Analysis in Adobe Reader. This will allow people to insert comments into your document without special software such as Adobe Reader.

Save the document with the original name, overwriting the original file. This will replace your original PDF review document. And we'll click Yes here. When you have selected that option for enable and commenting in Adobe Reader and you have saved the file you can go ahead and close out of this window. When you have finished this process, check the document back in using the ePlanning toolbar up above here in Webtop.

Lastly, we'll finish the task in the Enable Annotations message in your Inbox. When the document has been enabled for commenting and you have finished the task in your Inbox, a notification is sent to all assigned reviewers instructing them to begin their reviews. This message will only show up in the Inbox within ePlanning.