



Information classification: Internal

BRAINLOOP SECURE DATAROOM

Commenting and Review Feature

CONTENTS

1. Introduction.....	3
2. Prerequisites for the Commenting and Review Feature.....	3
2.1. Dataroom Configuration Settings.....	3
2.2. Client System Requirements.....	4
2.3. Recommended Web Browsers	4
3. The Commenting Feature	5
3.1. Opening a Brainmark Document and Adding Private Comments	5
3.2. Commenting and Markup Tools	8
4. The Review Feature.....	10
4.1. Start Reviews for a Brainmark Document	10
4.2. Invite additional Dataroom members to join an existing shared review of a Brainmark document	11
4.3. Join a Review of a Brainmark Document	12
5. Comments and Versioning	13
6. Support	14

1. Introduction

You can comment on documents in Brainmark format and can share these documents with other Dataroom users for a document review. Once a Brainmark document is opened in Adobe Reader, the **Comment** and **Annotations** panels that contain commenting and markup tools are opened by default.

2. Prerequisites for the Commenting and Review Feature

2.1. DATAROOM CONFIGURATION SETTINGS

The Dataroom Manager or the Dataroom Center Manager must activate the following Dataroom configuration settings for the commenting and review feature:

1. Activate the **Adobe rights management** option for the relevant Dataroom:
Click **Dataroom Center Administration** and/or **Dataroom Administration > Settings > General Features > Edit > General Options > Adobe rights management**.
2. Activate the **Server-side Shared Annotations** option in the Brainmark options of the Dataroom:
Click **Dataroom Center Administration** and/or **Dataroom Administration > Settings > Brainmark Options > Edit > General Options > Server-side Shared Annotations**.
3. Activate the permission **Add Server-side Annotations** for the desired groups in the **Group Permissions and Policies** dialog:
Click **Dataroom Administration > Users and Groups > Group Management > (Select group) > See Permissions > Permissions > Change Permissions > Add Server-side Annotations**.
4. Users who want to share documents for a document review (initiators of the review) with other Dataroom users must have the permission to see the users they want to invite to the review.
5. Users who are invited to join a document review must have the permissions to see each other and to see the initiator of the review.

Ask your Dataroom Manager or your Dataroom Center Manager to activate the above settings for you if you want to work with the commenting and review feature.

2.2. CLIENT SYSTEM REQUIREMENTS

The commenting and shared review feature is compatible with the supported Adobe Acrobat Reader versions. For details on the **Client System Requirements** for Brainloop Secure Dataroom, click [here](#).

2.3. RECOMMENDED WEB BROWSERS

You can use a web browser of your choice but it has to be configured so that PDF files are opened in Adobe Reader.

3. The Commenting Feature

3.1. OPENING A BRAINMARK DOCUMENT AND ADDING PRIVATE COMMENTS

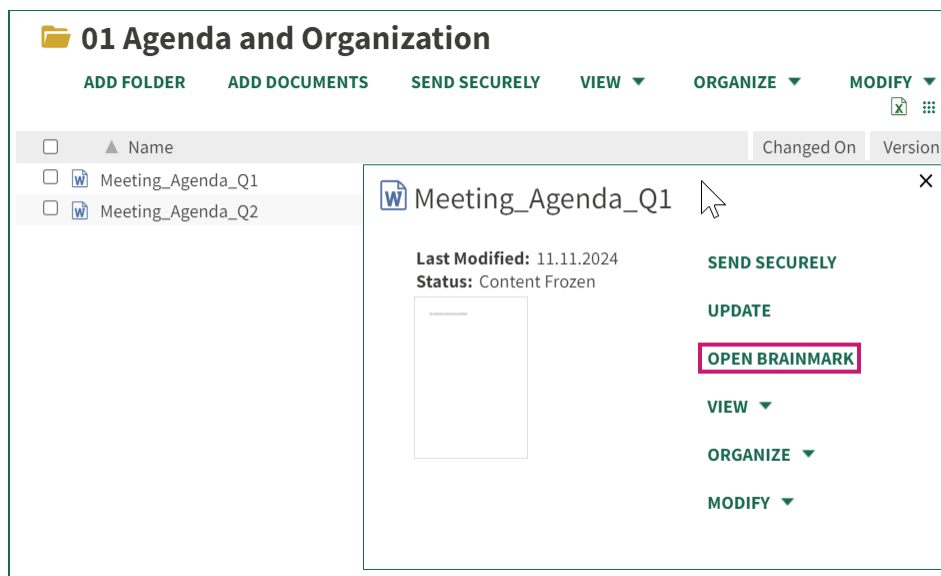
Please note that Acrobat's commenting feature is only available for Brainmark Documents and for document collections. Users who only have the permission to download Brainmark Documents can simply open the document. Users with permission to open original files need to open the Brainmark version manually. To do this, click **Details > Open Brainmark**.

Adding Private Comments to Brainmark Documents:

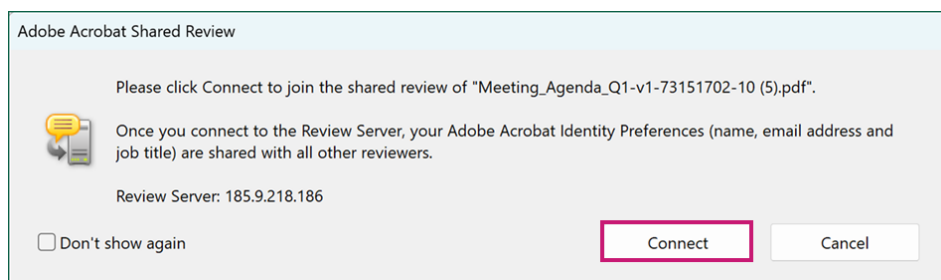
1. Move the mouse over the name of a document in the Folders list to display the **Details** option to the right of the document's name and select it.

The **Details** view is displayed.

2. Click **Open Brainmark**.



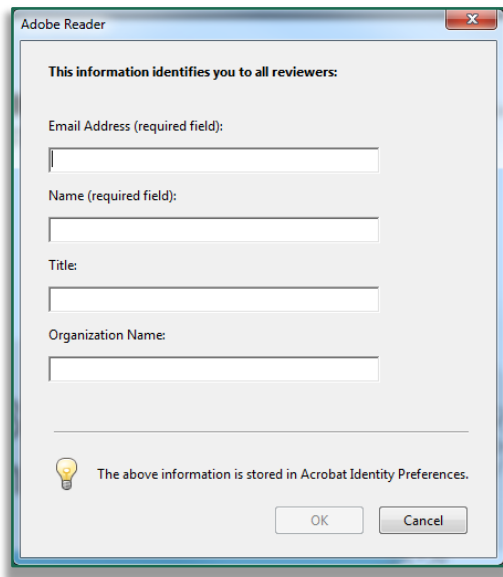
3. Adobe Reader is opened. If you comment on a Brainmark Document for the first time, the **Shared Review** window is displayed.



4. Click **Connect**.

5. If you are submitting a review for the first time, you must identify yourself in the following Adobe Reader dialog window.

This information is stored in Adobe Reader and will not be displayed again.



The screenshot shows a dialog box titled "Adobe Reader" with a close button (X) in the top right corner. The main text inside the dialog reads: "This information identifies you to all reviewers:". Below this text are four input fields, each with a label: "Email Address (required field):", "Name (required field):", "Title:", and "Organization Name:". At the bottom of the dialog, there is a lightbulb icon followed by the text: "The above information is stored in Acrobat Identity Preferences." and two buttons: "OK" and "Cancel".

6. Specify this information:

E-mail Address (mandatory):

Please make sure to enter the exact e-mail address you use to log into the given Dataroom. This field is case-sensitive; therefore please pay attention to upper and lower case letters.

Name (mandatory):

Enter your name. We recommend that you enter the username that is displayed in your Dataroom.

Title (optional):

Enter your title, or leave this field empty.

Organization Name (optional):

Enter the name of your company, or leave this field empty.

7. Click **OK**.

The **Welcome to Shared Review** window displays your reviewer status and your reviewer profile.

Welcome back to Shared Review

 **Welcome back to Meeting_Agenda_Q1-v1-73151702-10 (3).pdf**

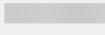
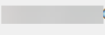
Your Review Status

Deadline: None

Comments: 2 new/2 total

Reviewers: 0 new/1 active

Your Reviewer Profile


@brainloop.com

Email	Reviewer Name	Title	New/Total Comments	Type
 @brainloop.com			2 / 2	Initiator

 **Review Server:** 185.9.218.186

☐ Don't show again **OK**

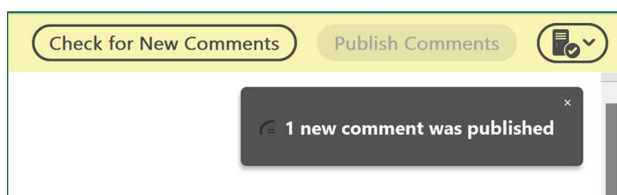
7. If necessary, select your Reviewer Profile.
8. Click **OK**.

The Brainmark document is displayed in Adobe Reader. The **Comment** panel with the available Annotation tools is opened by default.

9. In the Brainmark document, scroll to the position where you want to add your comments.
10. Click on the desired annotation tool with your mouse and enter sticky notes, free text, or highlight the text on the position you want (also see Commenting and Markup Tools).
11. Once you have finished adding your annotations, click **Publish Comments** to save the comments to the server.



12. Your comments are saved securely to the corresponding Dataroom. Adobe Reader displays a corresponding message.



13. To close the document, click **x**. You do not need to click **Save**.

Note: You can edit your comments and markups and also delete your comments at anytime until the **Review until** date has been reached. Please note, however, that comments and markups in a shared review can only be deleted by the creator of the comment.

3.2. COMMENTING AND MARKUP TOOLS

Once a Brainmark document is opened in Adobe Reader, the **Comment** and **Annotations** panels that contain commenting and markup tools are opened by default. You can use the text annotation tools for text editing, including insertions and deletions, strikethrough, and underlines, and leaving notes for the author or other reviewers.

Important Note: If you use an Adobe Reader commenting tool that is not supported by Brainloop Secure Dataroom, your comments will be displayed in Adobe Reader, however, they will be deleted after you click **Publish Comments**.

The following Adobe Reader commenting tools are supported by Brainloop Secure Dataroom:

Tool	Action	Supported by Brainloop Secure Client App?
	Add a sticky note at cursor position Sticky notes are useful when you want to make overall comments about a document or a section of a document, rather than commenting on a particular phrase or sentence.	Yes ¹
	Highlight text	Yes ¹
	Add text comment	Yes ¹
	Draw freehand	Yes ¹
	Insert text at cursor position	No ²

¹ Comments made with this Adobe Reader tool are displayed in the Secure Client App.

² Comments made with this Adobe Reader tool cannot be transferred into the Secure Client App.

	Replace text Indicate which text should be removed, and type in the text that should replace it.	No ²
	Strikethrough text Indicate which text should be deleted.	No ²
	Underline text Indicate which text should be underlined.	No ²
	Add Note to Text Highlight text and add a note.	No ²

4. The Review Feature

4.1. START REVIEWS FOR A BRAINMARK DOCUMENT

You can start a review for a Brainmark document by commenting on the document in Brainmark format and inviting other Dataroom members to join the document review.

The document is then made available to the selected reviewers. Alternatively, you can invite Dataroom members to join a review of an uncommented Brainmark document.

To invite Dataroom members to join a review of a Brainmark document:

1. Move the mouse over the name of the item and click **Details** to the right of the item's name.

The **Details** view is displayed.

2. Select **Send Securely**.

The **Send "[Name]" Securely** dialog window is displayed.

3. From the **Security Level** drop-down list, select **Maximum (Dataroom members)**.
4. **Private message (visible only to sender and recipients):** Enable this option if you do not want the send operation to be visible to other Dataroom members. The send operation will still be visible in the item history, but not the message text. Please note that this option is only visible if your Dataroom Manager has enabled it.
5. In the **Recipients** field, enter the Dataroom members you want to invite to the review. To select a recipient, enter the first letters of the username in the **Recipients** field and select the desired recipient. Alternatively, you can click  and select a recipient in the **Browse & Select** dialog.
6. From the **Document Review** drop-down list:

Select **Share existing private review** if you want to share your private comments with other Dataroom members.

Select **Start a new shared review** if you want to invite Dataroom members to join a review of an uncommented Brainmark document.

7. Specify this information:

Review until: Date when the review will be closed.

After this date, reviewers can no longer publish their comments; they can always view comments that have already been added, however.

Send myself a copy: Enable this option, if you want to receive a copy of the e-mail.

Subject: The name of the item is entered as the subject by default. Overwrite this default text, if applicable.

Message: Enter a message text (maximum 3000 characters).

Remind me on: You receive a notification by e-mail, if not all recipients have downloaded the Brainmark document by this date.

8. If you want to change the name of the review that was automatically generated, overwrite it in the **Name of Review** field.
9. Click **Send**.

The invitation to the review is sent by e-mail. You see a confirmation in the **Messages** pop-up window at the bottom of the Dataroom window.

Note: In a shared document review, all the people involved can only open the commented Brainmark document from their **Inboxes** or from **All Messages** in the **Messages** view. A shared, commented Brainmark document cannot be opened and further commented through the regular **Open Brainmark** action.

4.2. INVITE ADDITIONAL DATAROOM MEMBERS TO JOIN AN EXISTING SHARED REVIEW OF A BRAINMARK DOCUMENT

To invite additional Dataroom members to an already existing shared review:

1. Move the mouse over the name of the item and click **Details** to the right of the item's name.
The **Details** view is displayed.
2. Select **Send Securely**.
The **Send "[Name]" Securely** dialog window is displayed.
3. From the **Document Review** drop-down list, select **Invite to: [Name of Review]**.
Proceed as described in the previous chapter.

➤ Send "Meeting_Agenda_Q1" Securely

Security Level: Maximum (Dataroom members) ▼

Recipients: Enter a name or email address

Recipients: This list is empty.

Document Review: No document review ▼

Subject: M

Message:

0 characters (maximum 3000)

Remind Me On: No date selected

Buttons: Send, Cancel

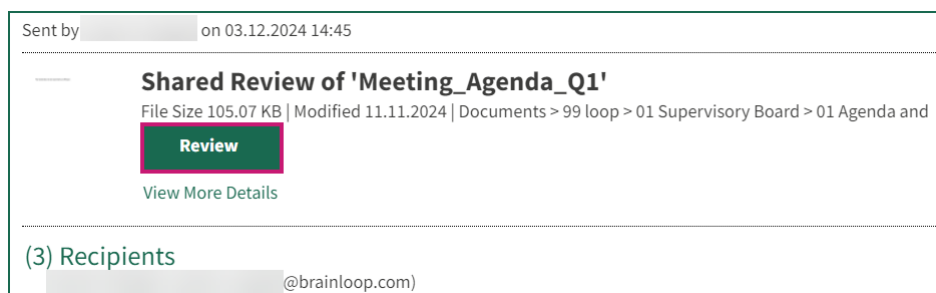
4.3. JOIN A REVIEW OF A BRAINMARK DOCUMENT

If you are invited to join a review of a Brainmark document and have the necessary permissions, you can add your own comments to a document review.

To join a document review:

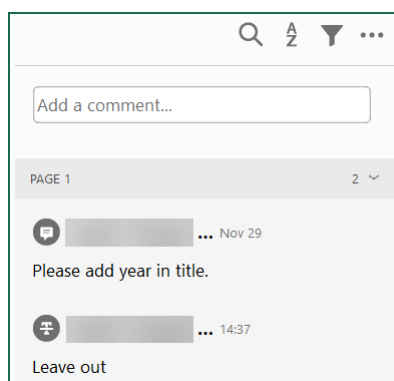
1. Log in to your Dataroom.
2. Open your **Inbox** in the **Messages** view.
3. Select the desired message from the list.

A page containing the name of the review and the document is displayed.



4. Click **Review** to comment on the document in Adobe Reader.
5. If you join a review for the first time, you must identify yourself in Adobe Reader. Your details are stored in Adobe Reader (see Opening a Brainmark Document and Adding Private Comments).
6. Once you have entered your identity details, the **Welcome to Shared Review** dialog window is displayed with an overview of the participants.
7. If necessary, select your Reviewer Profile.
8. Click **OK**.

The Brainmark document is displayed in Adobe Reader. The **Comment** tab with the available Annotation tools is opened by default. You now see all comments shared with you and the respective author. Simply select an entry to jump to the corresponding location in the document.



9. In the Brainmark document, scroll to the position where you want to add your comments.

10. Click the desired annotation tool with your mouse and, for example, enter sticky notes, free text, or highlight the text on the position you want (see Commenting and Markup Tools available in Brainmark Documents).
11. Click **Publish Comments**. Your annotations are saved securely to the corresponding Dataroom. Adobe Reader displays a corresponding message.
12. Click **x** to close the document. You do not need to click **Save**.

5. Comments and Versioning

If there are newer versions of a document to which you have added private comments, your comments will be retained in the older document versions. You can view these by switching between document versions.

1. In order to view an older version of a document or document collection, move the mouse over the name of the item and click **Details** to the right of the item's name.
The **Details** view is displayed.
2. Open the **View** menu and select **Properties**.
3. In the **Properties** view, select the required version under **Status Information** and click **Open Brainmark**.

Note: In the case of document collections, comments in documents that were not modified will be retained in the updated version of the document collection. To update a document collection so that it includes the latest version of all documents, move the mouse over the name of the document collection, click **Details > Update**.

6. Support

If you have any additional questions about Brainloop Secure Dataroom, please contact our support staff:

24/7 Phone Support:

From **USA**: +49 89 444 699 84

From **Germany**: 0 800 517 3181 (toll-free)

From **Austria**: 0 800 298 371 (toll-free)

From **France**: 0 800 205 035 (toll-free)

From **Switzerland**: 0 800 272 465 (toll-free)

From **other countries**: +800 272 465 66 (global toll-free)

Alternative: +49 89 444 699 84

E-mail Support: support@brainloop.com