
Welcome to Office Hours

February 2024

Protocols for Today

- ✓ Using demo environments
- ✓ Customer-specific questions may warrant a follow-on discussion
- ✓ Parking lot for any follow-ups needed outside of this session and feature requests
- ✓ Submit questions via Zoom Q&A or use Raise Hand and you will be unmuted
- ✓ Recording & slide deck will be shared afterwards

Today's Format

1. Capability Showcase by Vodori - 15 mins
2. Pre-submitted Topics - 15 mins
3. Open Q&A - 15 mins
4. Looking Ahead - 5 mins

Mid-Review Edits

If you need to make changes to a document under review, you have several options depending on the type of changes required.

- **Remove, edit, or add a reviewer**
- **Link additional supporting documents**
- **Edit due date**
- **Edit and re-circulate a document**

The screenshot displays a user interface for managing a document under review. At the top, there is a section labeled "Assigned to" with two user avatars and an "Edit/reassign" button. Below this, there are three main action cards: 1) "Edit due date" with a calendar icon and a "Select" button at the bottom. 2) "Edit" with a pencil icon and the text "Amend the document now and resubmit for review." 3) A summary bar for "Annotations", "Substantiation 2", and "Supporting Material 0", with buttons for "Add annotations", "Auto substantiate", and a filter icon.

Mid-Review Edits: Best Practice Recommendations

Initiator, Coordinator & Content Owner:

- If a reviewer has not yet cast a vote, the initiator of the document has the opportunity to [edit/reassign](#).
- If the Review step has not yet been completed, Initiators can add additional review groups.
 - The initiator will also have the opportunity to remove an optional review group if the assignee(s) have not cast a vote.
- If the document has been sent for review and you notice additional updates were needed to the document, select '[Edit](#)' in the More Actions menu
- If a document has already been sent out for review, initiators can [cancel](#) at any point

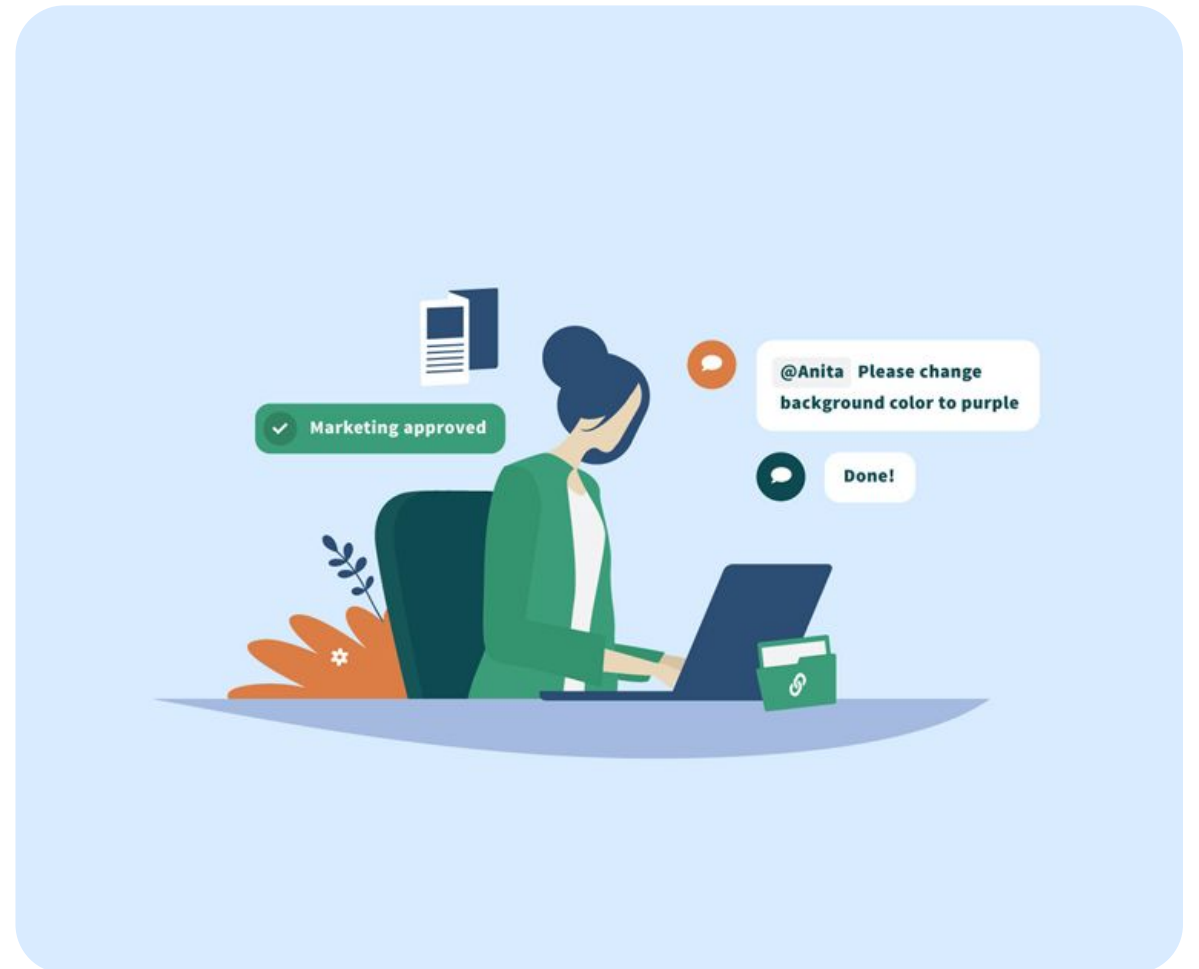
Pre-submitted Topics

1. Reporting in Pepper Flow
2. Recirculating an Expired document
3. Features to support providing & incorporating feedback

Efficient Feedback Loop

Features that will support your team in **efficiently collaborating** the review and approval of your most important materials:

- @ mention other users
- Color code your annotations
- Compare versions
- Import your annotations
- Reply to and Resolve comments





Open Q&A

Looking Ahead

- Recording & slides will be shared after this call
- You can view all previous office hours [here](#) on our Help Center
- Next office hours session: **March 21 @ 12:00pm CST**

Thank you