

# IPPC Online Comment System (OCS) User Manual

<http://ocs.ippc.int/index.html>

System Requirements: Internet Explorer 6.0 (or newer), Google Chrome, Mozilla Firefox or Safari and Adobe Flash 10.1 (or more recent).

This manual was developed to provide guidance to all users of the IPPC Online Comment System (OCS): the country or organization's contact point, the lead, the assistant(s) and the reviewer(s). It allows users to submit comments on draft specifications and ISPMs for member consultation and for draft ISPMs during the substantial concerns commenting period.

The OCS uses the same template format that you are familiar with from previous member consultations. The system allows you to monitor the status of comments from reviewers in your country/organization. Your work within the OCS is fully confidential.

As you are reading the guide, you will see these symbols. They indicate which users can perform specific tasks in the OCS:



Contact point



Lead



Assistant



Reviewer

## 1. User roles

### Contact point

As the official contact point for your country or organization, you are the only person in your country or organization recognized by the IPPC as being able to submit comments on draft ISPMs and specifications. You will be able to coordinate the standard review process in your country/organization using the OCS. You will determine who within your country/organization should have access to the OCS to review draft ISPMs and specifications and, for each document open for commenting, you will be able to invite them to comment through the OCS. They will submit comments to you through the OCS and you will be able to edit, review and consolidate them, and add your own comments, before submitting them to the IPPC Secretariat.

**Note:** The IPPC Secretariat can only see your comments after you have submitted them.

### Lead (optional)

As the Lead for your country/organization, you will imitate the contact point and see and do every thing the contact point can. Therefore, the tasks that can be performed by the lead are the same than those performed by the contact point, with the exception that the lead **CANNOT** submit comments to the IPPC Secretariat. Only the contact point can proceed and submit comments to the IPPC Secretariat.



### Assistant (optional)

As the assistant for your country/organization, you will be able to coordinate the standard review process for your country/organization using the OCS. You will determine who within your country/organization should have access to the OCS to review draft ISPMs and will be able to invite them to comment through the OCS. They will submit their comments to you through the OCS and you will be able to edit, review and consolidate them, and add your own comments.

**Note:** the assistant **CANNOT** share comments with other Contact Points, from other countries/organizations (he can only share comments with the reviewers, the lead and the contact point from its own country) and **CANNOT** submit comments to the IPPC Secretariat.

### Reviewer (optional)

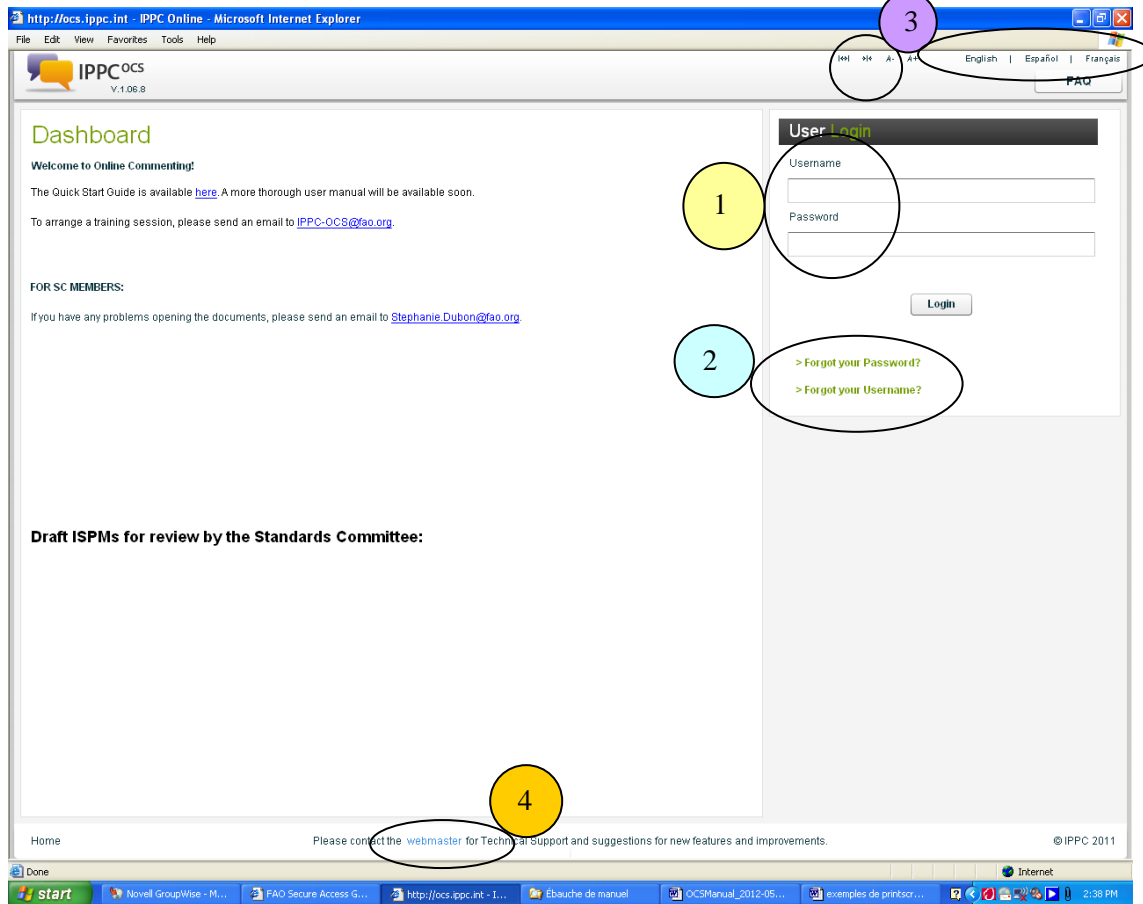
As a reviewer for your country/organization, you will be able to add your own comments and submit them to the Contact Point or the Assistant.

**Table 1: Summary of the user roles**

Use rRole	Contact Point	Lead	Assistant	Reviewer
Add new users	X	X	X	
Delegating a Lead	X			
Inviting Assistants	X	X		
Inviting Reviewers	X	X	X	
Adding comments	X	X	X	X
Modify comments	X	X	X	X
Deleting comments	X	X	X	X
Verifying comments	X	X	X	X
Submitting comments	X			
Sharing comments	X	X		
Creating reports	X	X	X	X

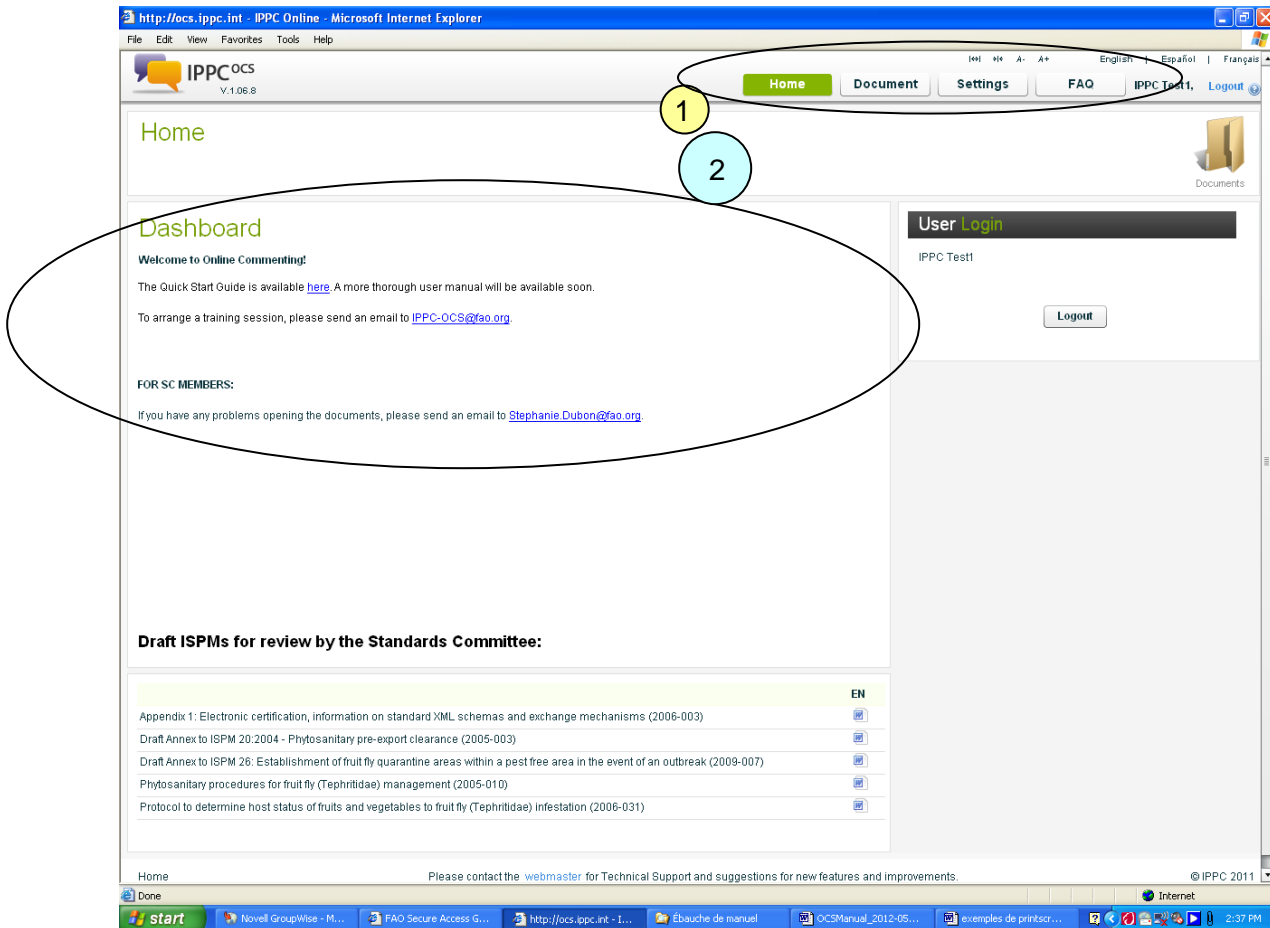
## 2. The Online Comment System at a glance

Figure 1. Login page



1. Enter your username and password
2. Click on these links in case you forgot your username or password. Procedures on how to retrieve the information will be provided.
3. You can select the size of characters, and your preferred language in which you want to navigate on the OCS.
4. If you need technical support, you can click on the link and contact the webmaster.

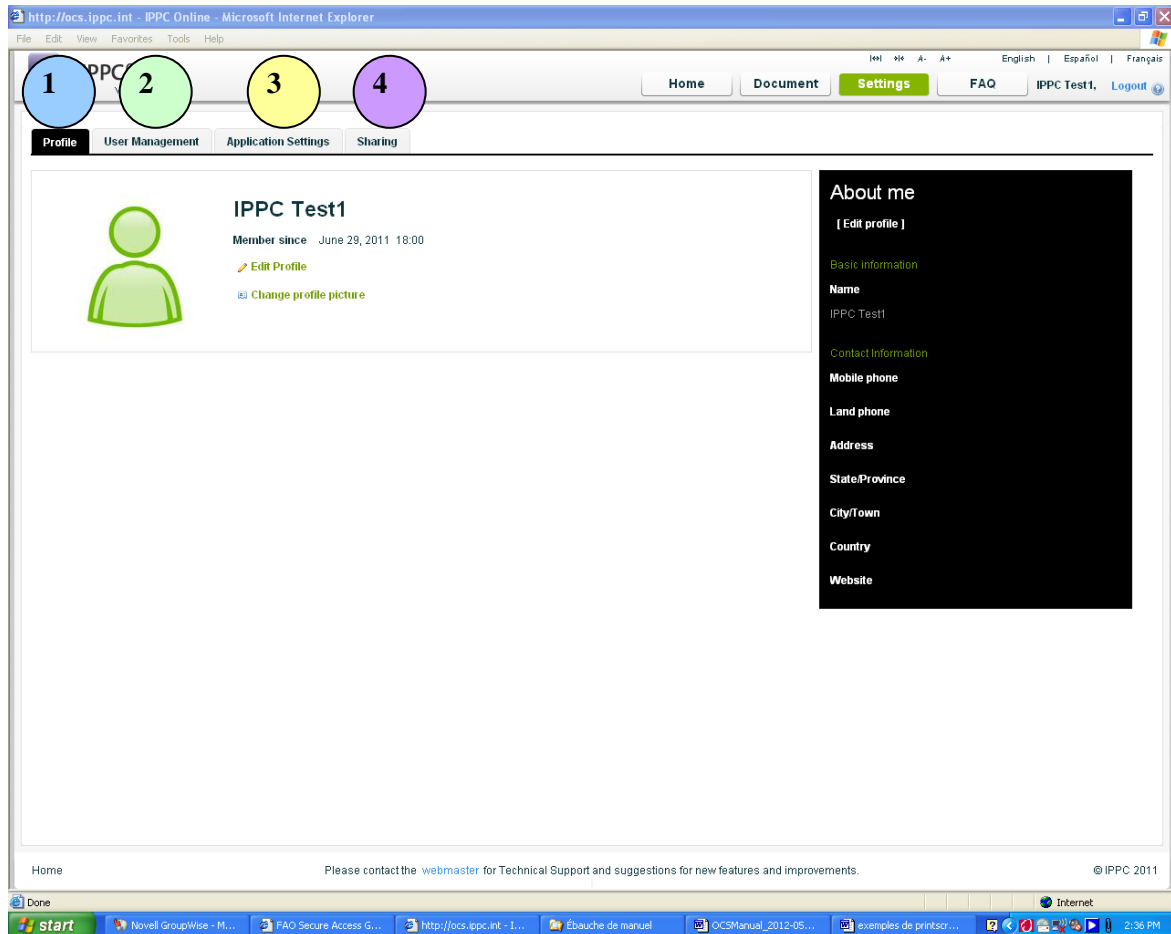
**Do not use your internet browser's back button (you would then be logged out of the system). Only navigate using the features inside the system.**

**Figure 2. Dashboard (Welcoming screen)**

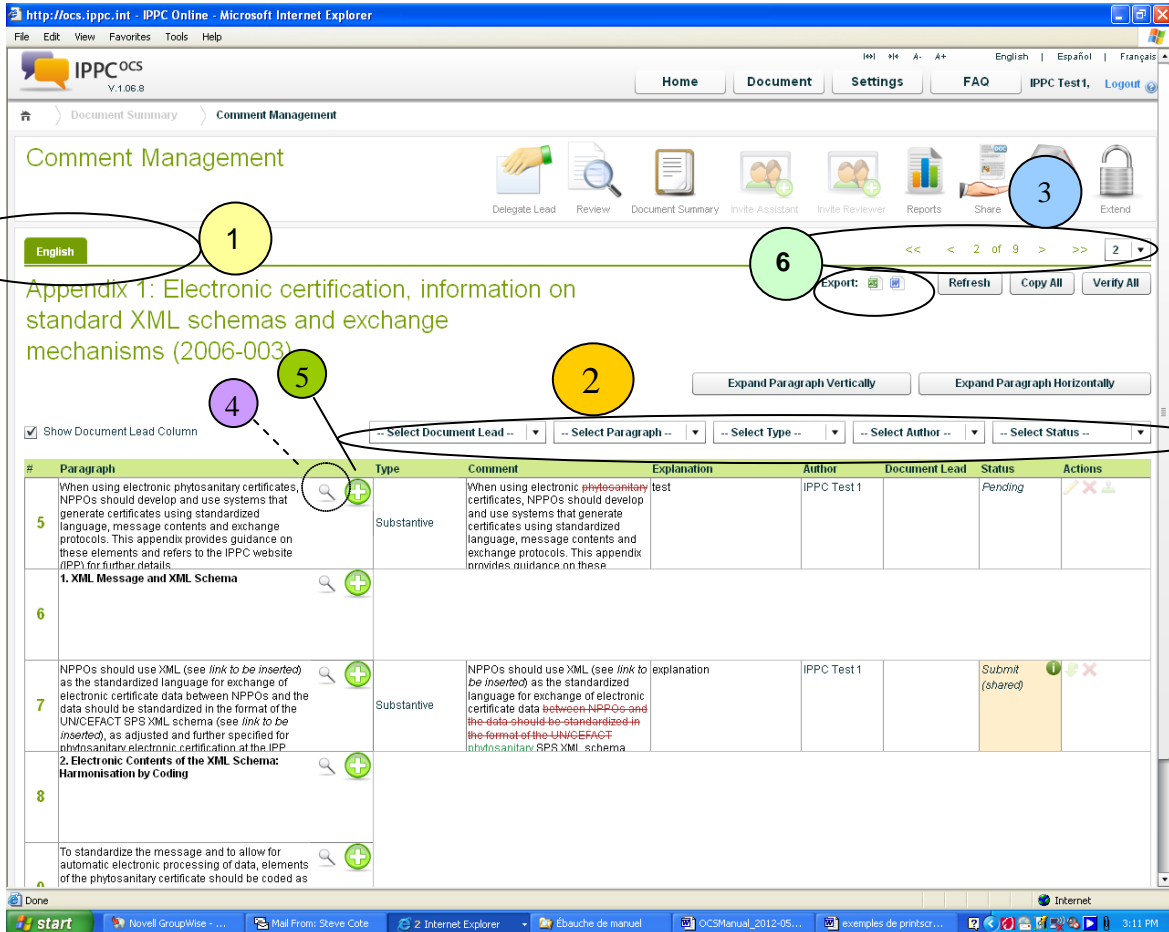
1

2

1. These four tabs will allow you to navigate and perform the main tasks of the OCS.
2. Note that the Dashboard (welcoming screen) is updated on a regular basis by the IPPC Secretariat.

**Figure 3. Settings**

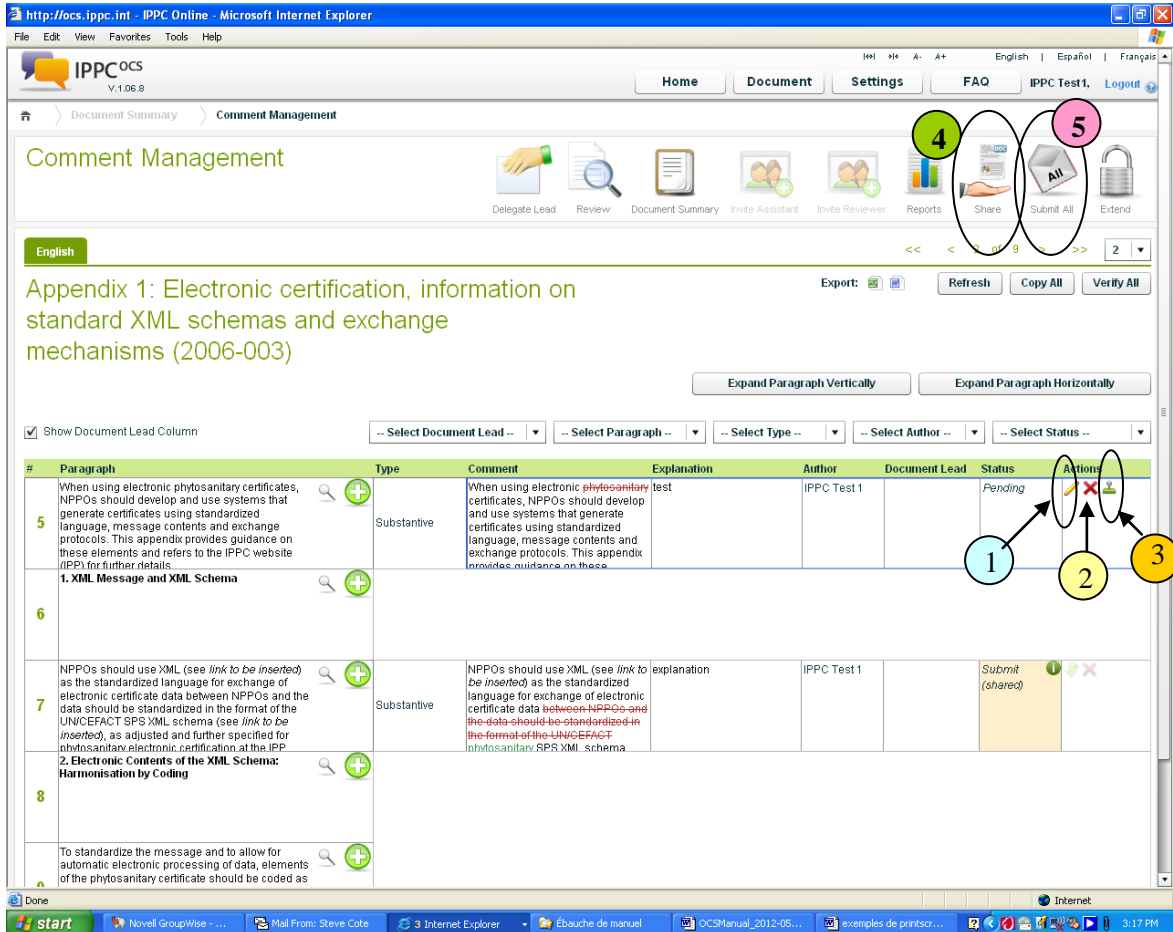
1. On the Profile Tab, you can edit your profile information, change your password and e-mail address.
2. On the User Management Tab, you can add new users (lead, assistant, reviewer) and create their account.
3. On the Application Settings Tab, you can change the number of documents, comments, paragraphs and users you see per page.
4. On the Sharing Tab, you can create a rule for sharing at a global level.

**Figure 4a. Comment management screen**

The screenshot shows the IPPC OCS Comment Management interface. It includes a navigation bar with 'Home', 'Document', 'Settings', 'FAQ', 'IPPC Test1', and 'Logout'. The main content area is titled 'Comment Management' and features a toolbar with icons for 'Delegate Lead', 'Review', 'Document Summary', 'Invite Assistant', 'Invite Reviewer', 'Reports', 'Share', and 'Extend'. A language selector is set to 'English'. The main text area displays 'Appendix 1: Electronic certification, information on standard XML schemas and exchange mechanisms (2006-003)'. Below this is a table with columns: '#', 'Paragraph', 'Type', 'Comment', 'Explanation', 'Author', 'Document Lead', 'Status', and 'Actions'. The table contains three rows of data. Callouts 1-6 highlight specific features: 1. Language selector; 2. Filter dropdowns; 3. 'Share' icon; 4. Expand icon; 5. Comment icon; 6. Export buttons.

#	Paragraph	Type	Comment	Explanation	Author	Document Lead	Status	Actions
5	When using electronic phytosanitary certificates, NPPOs should develop and use systems that generate certificates using standardized language, message contents and exchange protocols. This appendix provides guidance on these elements and refers to the IPPC website (IPPI) for further details.	Substantive	When using electronic phytosanitary certificates, NPPOs should develop and use systems that generate certificates using standardized language, message contents and exchange protocols. This appendix provides guidance on these		IPPC Test1		Pending	
6	1. XML Message and XML Schema							
7	NPPOs should use XML (see <i>link to be inserted</i> ) as the standardized language for exchange of electronic certificate data between NPPOs and the data should be standardized in the format of the UNCEFACT SPS XML schema (see <i>link to be inserted</i> ), as adjusted and further specified for phytosanitary electronic certification at the IPP.	Substantive	NPPOs should use XML (see <i>link to be inserted</i> ) as the standardized language for exchange of electronic certificate data between NPPOs and the data should be standardized in the format of the UNCEFACT SPS XML schema	explanation	IPPC Test1		Submit (share)	
8	2. Electronic Contents of the XML Schema: Harmonisation by Coding							
	To standardize the message and to allow for automatic electronic processing of data, elements of the phytosanitary certificate should be coded as							

1. You can choose the language in which you submit your comments. However, please note that due to resources issues, the IPPC Secretariat strongly encourages users to submit their comments in English.
2. You may decide to filter your comments by using the drop down menus (paragraph, type, author, status). By adding filters, you can create different reports.
3. Use these arrows and the drop down menu if you want to go directly to another page.
4. By clicking this icon, you will be able to expand the text for this paragraph.
5. By clicking on this icon, you will be able to provide comments on the paragraph.
6. By clicking on these buttons, you create a report by downloading the current view of your comments, either in Word or Excel.

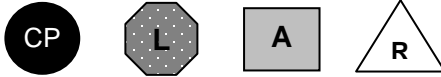
**Figure 4b. Comment Management Screen (continued)**

#	Paragraph	Type	Comment	Explanation	Author	Document Lead	Status	Actions
5	When using electronic phytosanitary certificates, NPPOs should develop and use systems that generate certificates using standardized language, message contents and exchange protocols. This appendix provides guidance on these elements and refers to the IPPC website (IP2) for further details.	Substantive	When using electronic phytosanitary certificates, NPPOs should develop and use systems that generate certificates using standardized language, message contents and exchange protocols. This appendix provides guidance on these elements and refers to the IPPC website (IP2) for further details.	test	IPPC Test1		Pending	1 2 3 4 5
6	1. XML Message and XML Schema							
7	NPPOs should use XML (see <i>link to be inserted</i> ) as the standardized language for exchange of electronic certificate data between NPPOs and the data should be standardized in the format of the UNCEFACT SPS XML schema (see <i>link to be inserted</i> ), as adjusted and further specified for phytosanitary electronic certification at the IPPC.	Substantive	NPPOs should use XML (see <i>link to be inserted</i> ) as the standardized language for exchange of electronic certificate data between NPPOs and the data should be standardized in the format of the UNCEFACT SPS XML schema (see <i>link to be inserted</i> ), as adjusted and further specified for phytosanitary electronic certification at the IPPC.	explanation	IPPC Test1		Submit (shared)	1 2 3 4 5
8	2. Electronic Contents of the XML Schema: Harmonisation by Coding							
9	To standardize the message and to allow for automatic electronic processing of data, elements of the phytosanitary certificate should be coded as							

1. By clicking on this icon, you can modify the comment.
2. By clicking on this icon, you can delete the comment.
3. By clicking on this icon, you can verify the comment.
4. By clicking on this icon, you can share your comments.
5. By clicking on this icon, you can submit your comments.

### 3. Document management: step by step

#### 3.1 Login



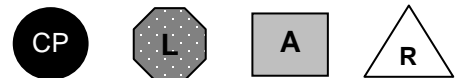
- Go to <http://ocs.ippc.int/index.html>
- Enter your **username** and **password** and click on **Login (Figure 1)**
  - If you forgot your username or password, click on the link **Forgot your Username? Or Forgot your Password?**
- Once logged in, you'll note that the Dashboard (welcoming screen) (Figure 2) is updated on a regular basis by the IPPC Secretariat. Please note the four tabs on the top of the screen (**Home, Document, Setting, FAQ**), they allow you to navigate and performs the main tasks of the OCS.
- Note the languages (English, French and Spanish) in the upper right corner. The other FAO official languages will be available at a later date.
- **Note: Avoid using the internet browser's 'back button' as it would log you out of the system.**

#### 3.2 User Management: Add new user(s)



- Click on the **Settings** tab and then locate the **User Management** tab. Click on it.
- Click on **Add new user**.
- File in the required information (indicated with an \*).
- In the **User Role** field, select **Assistant** or **Reviewer**.
- Confirm by clicking **Add**.

#### 3.3 Open a document available for commenting



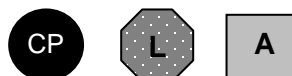
- To see a list of the documents available for commenting, click on the **Document** tab. You will see a list of documents, the commenting end date, the assistant assigned to the document, and the status (open, closed, etc).
- To select a document you wish to provide comments on, click on the title of the document, which will open the **Comment Management Screen** (Figure 4). You will also see a pop-up screen for selecting the language, please note that due to resources constraints, the IPPC Secretariat **strongly encourages** to submit comments in English.

#### 3.4 Delegating a Lead, inviting an assistant and reviewer(s)

##### Delegating a Lead



- In the **Comment Management screen** of the document you've selected, click on the **Delegate Lead** icon. On the pop up, all active accounts in your country/organization will be listed.
- Select the person you would like to name as **Delegate Lead**, then click on **Ok** to confirm.
- To remove or change the **Delegate Lead**, click on **Edit the Lead**, and either choose a new lead, or click on **Remove the lead**. Then click **Ok** to confirm.



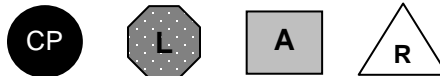


## Inviting an Assistant and Reviewer(s)

- In the **Comment Management screen** of the document you've selected, click on the **Invite Assistant** icon. On the pop up, all active accounts in your country/organization will be listed. This will show an email template.
- To select the **Assistant**, click on **Select Assistant** (or **Change Assistant** if one is already selected).
- Choose the **Commenting End Date**. This is the date by which the assistant should submit all its comments to the **Contact Point**. The default date is September 30.
- Review the message text, and click **Invite Assistant**.
- Follow the same process for inviting **Reviewer(s)**, by using the **Invite Reviewer** icon.



### Add new comments



- From the **Comment Management Screen** of the document you've selected, locate the paragraph you would like to comment on and click on the **Add comment** icon. Note: if you are not in the **Comment Management screen**, click on the general "**Comment**" icon.
- In the Add/Edit Comment screen, select the type of comment you want to provide: **Editorial**, **Substantive**, **Technical** or **Translation**. **Note:** for each paragraph, more than one type of comment can be submitted, but each type has to be done separately.
- In the **Comment** field, you will see the original paragraph content. To modify the text, simply click anywhere in the box. Then you will be able to **modify the existing text**. All additions will be indicated as green text with underline. All deletions will be indicated as ~~red text with strikethrough~~.
- In the **Explanation** field, enter clarification for your comment.
- To provide another type of comments, select the appropriate type in the **Type** field and repeat the steps above.
- When you are done, save your comment by clicking **Save all**. To come back to the Comment Management screen, click on **Save all (and close)** or **Cancel**.

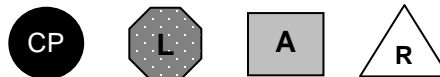


'Add comment' icon



General 'Comment' icon

### Modify a comment



- From the **Comment Management Screen** of the document you've selected, locate the comment you would like to modify and click on the **Modify** icon.
- In the comment editor and comment explanation, modify the existing text.
- To save your comment, click **Save**.



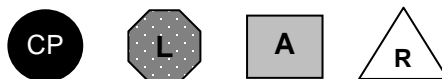
### Delete a comment



- From the **Comment Management Screen** of the document you've selected, locate the comment you would like to delete and click on the **Delete** icon.
- You will be asked to confirm that you really want to delete this comment. Click **Yes** or **No**. If you click **Yes**, the comment will be deleted.



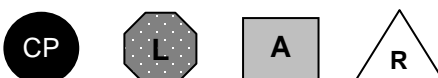
## Verify a comment



- When a comment has been added to the document, it has the **Pending status**, meaning that the comment is still in draft stage. In order to be able to share it with other contact points or to submit it to the IPPC Secretariat when you are done providing comments on a document, you need to **Verify** your comments.
- To **Verify** a comment, locate the three small icons in the far right column: a pencil, a red X and a green stamp. To verify the comment, click the green stamp.
- The status of your comment is now **Verified** and ready to be submitted to the IPPC Secretariat.



## Un-verify a comment



- Once a comment has been verified, you can **Un-verify** it by locating the small icon on the far right column, a green stamp with an 'undo' symbol. Click the **Un-verify** icon.
- The comment status will be changed to **Pending**.



## Submitting comments



- Once all comments in the document have been verified, you will be able to submit them to the IPPC Secretariat, by clicking on the **Submit all** icon on the top of the screen. Clicking this will submit all your verified comments to the IPPC Secretariat.
- In the pop-up **Submit Comments**, you will see a list of the comments that will be submitted to the Secretariat. Make sure to verify that all comments you want to submit appear in the box. To submit the comments, click on **Submit**.
- **Note: comments can be submitted or withdrawn at any time before midnight, Rome time, on the day the commenting closes.**



## Sharing comments



### Creating a rule for sharing comments:

- Click on the **Settings** tab, and then locate the **Sharing** tab. Click on it.
- There are two sharing rules: at the global level and at the document level. This is the Global Rule Sharing feature. Using this feature allows you to save a sharing group that will be automatically available to use every time you share a document.
- Click on **Add new rule**.
- Enter a rule name (e.g. Group 1)
- In the box Outside organizations, click on a country or RPPO in the available field and click the arrow to add them to the selected box.
- Under sharing, choose **all submitted comments** or **selected submitted comments**.
- Click ok.
- In the future, when you want to share your comments, this rule will be available.

### Sharing comments

- To share your submitted comments, click the **Share** icon at the top of the screen.
- You may decide to use a rule that you have already created. You can also create a rule for this document only, for example if you want to share a specific comment. To do this, click on **Add new rule**, and follow the process as indicated above under **Creating a new rule for sharing comments**: select the countries and, under sharing, choose **All verified and submitted comments** or **Selected verified and submitted comments**. If you choose the second option, you can further filter the comments by type or paragraph.
- At the bottom of the screen, click **Save**. You will then see all the available sharing options, and can **run** them by clicking on the green arrow.



### Creating a report



#### There are two ways to create reports:

- **To create a report of the comments (submitted or not):**
  - On the **Comment Management** screen, locate the small **Excel** and **Word** icons (Figure 4a, # 6).
  - Click on the format you would like to run the report.
  - This will create a report of the current view of your comments.
  - You may decide to use filters to create your report. Select the parameters you would like to use – paragraph, type, author, status (Figure 4a, # 2). Then click on the icon representing the format you want to run the report (Word or Excel).
- **To create a report of the comments that have been submitted**
  - On the **Comment Management** screen, locate the **Reports** icon, which will open the **Document Report** screen.
  - You can filter the comments in the report by **Comment Type**, **Language** and **Reviewer**, by selecting these filters on the left side of the screen.
  - Select the desired format for the report (Adobe PDF, Microsoft Word or Excel) and then click on **Download**.

