



Yeti Taxonomy Viewer Guide

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Table of Contents

1 Welcome to Yeti	1
1.1 The Taxonomy Viewer	1
2 Viewing Concepts	4
2.1 Network Browser	4
2.2 The Details Area	4
2.2.1 The Details Tab	5
2.2.2 The Relationships Tab	6
2.2.3 The Tree Locations Tab	6
2.3 Linking to Concepts	7
2.4 Downloading a Taxonomy	7
3 Searching	8
3.1 Advanced Searching	9
	10
	10
3.4 References Search	11
· · · · · · · · · · · · · · · · · · ·	13
5	13
	14
	16
	16
4.5 Deleting Issues	17
	17
4.7 Exporting Comments	18
	19
	19
5.2 Configure Review Group Membership	20

Chapter 1. Welcome to Yeti

Yeti is a versatile review tool for viewing and commenting on XBRL taxonomies. This guide describes how to use the Yeti Taxonomy Viewer, and is aimed at all users. The Taxonomy Viewer is where taxonomy review takes place. You can browse relationships, examine concept details, make comments and view comments that other users have made. Some sections of the guide are only relevant to users with administrative permissions.

The officially supported browsers for Yeti are the latest versions of Firefox and Internet Explorer.

Please be aware that there could be some minor display issues when using Yeti on Linux or Mac OS

1.1. The Taxonomy Viewer

When you arrive at the Yeti homepage, you will be shown a list of taxonomies available for public viewing (fig. 1.1).

Open Taxonomy	×
Please select a taxonomy. To see more taxonomies, please <u>log in</u> or <u>sign up</u> .	
🖃 🏠 Public Review	
□	
Banking and Savings Institutions	
Brokers and Dealers	
Open Cancel	

Figure 1.1: The Open Taxonomy dialog.

You can choose a taxonomy from this list, or log in by clicking on the **log in** hyperlink to see additional subscription-only taxonomies (fig. 1.2). If you already have a Yeti account you can log in with your username, which is the same as your email address. If your system administrator has enabled Yeti authentication via an LDAP server then you do not need a Yeti account. You can just log in with your LDAP username and password.

		Open Taxonomy	×
Please se	elect a taxonomy. To	see more taxonomies, please <u>log in</u> or <u>sign up</u> .	
	ublic Review	Login X	
9.8	Please provide log	gin details.	
	Username:	user@example.com	
	Password:	•••••	
	lf you have forgotte	en your password you can <u>reset it</u> .	
		Submit Cancel	
l l			
		Open Cance	

Figure 1.2: The Login dialog.

If you need a Yeti account, you can create one by clicking the **sign up** hyperlink in the *Login* dialog, or the **Sign Up** button on the menu bar. The email address you enter will also be the username you need to log in to Yeti.

NOTE: The sign up option will only be available if it has been enabled by a Yeti Administrator.

To return to the list of taxonomies, click Taxonomy > Open (fig. 1.3).

Ę	Taxonomy 🔹 Admin Area					About	Profile 🔻	Logout
	Open	(X)	Details	Relationships	Tree Locations			
P	Download Taxonomy	💌 Lang: en-US 💌	Commitmer	its and Conti	ngencies			9
Ī	Export Comments	ment of Financial Position, Unclassified - Insur	Labels					
ľ	Statement of Financial	Position [Abstract]	Role	Lang	Label			
	i ⊡ () Statement [Table] i i i Statement, Scen		Standard Label	en-US	Commitments an	nd Contingencies		Ģ

Figure 1.3: The Taxonomy menu.

The Taxonomy Viewer is arranged into three main areas (fig. 1.4):

- 1. Network Browser
- 2. Details Area
- 3. Tools Panel

Network Browser	~	Details	Relationships	Tree Locations	
etwork: Presentation 🗸 Lang	g: en	Non-Curren	t Liabilities		
Balance Sheet		Labels			
Balance Sheet		Role	Long	Label	
			Lang Label en	Label Non-Current Liabilities	
Liabilities and Shareholders' Equity		Stanuaru	Laber en	Total obligations incurred as part of norr	
⊟ 🧛 Liabilities ⊕ 🗛 Current Liabilities		Documer	ntation en	operations that are expected to be repair beyond one year or one operating cycle.	d 🗣
Non-Current Liabilities		Verbose	Label en	Non-Current Liabilities	9
■ Total Liabilities ■ Q Equity		Standard	Label fr	Passif à long erme	
		Documer	ntation fr	Total des coligations contractées au titre activités normales, que l'on s'attend à rembourser dans plus d'un an (ou autre du cycle d'exploitation).	
Statement Of Comprehensive Income		Verbose	Label fr	Passif à long terme	A
Statement of Retained Earnings with Comprehensi Statement of Retained Earnings without Comprehe		Reference	_		
- and the statement of rectained carriings without comprehe			-		
		Role	Refere		
		Referenc	e Name	CP	Ģ
ools					
Search Comments					
on-Current Liabilities	Search				
	Element Lab		Matched V	/alue	Rank
ocal Name		Current Liabilites	Other Non	-Current Liabilities	100%
	Other Non-O				
therNonCurrentLiabilities	Other Non-O	9	Non-Curre	ent Liabilities	100%
ocal Name DtherNonCurrentLiabilities fotalNonCurrentLiabilities iabilitiesRelatedAssetsHeldSaleNonCurrent	Non-Current	t Liabilities		ent Liabilities Related to Assets Held for Sale, Non-Current	100% 75%

Figure 1.4: The three main areas in the Taxonomy Viewer.

Each of these areas is resizable. Additionally, the Network Browser and Tools Panel can be hidden/reshown using the solution in the top right hand corner of the panel. Clicking on the panel bar of a collapsed panel will temporarily show it over open panels.

Chapter 2. Viewing Concepts

2.1. Network Browser

When the taxonomy you selected from the *Open Taxonomy* dialog has loaded, the Network Browser on the left hand side of the page will display relationships between concepts in the taxonomy. Clicking on a concept in the Network Browser will open its details in the Details Area.

If the taxonomy has labels in multiple languages, you can select the label language from the Network Browser's menu bar (fig. 2.1).



Figure 2.1: Language selection in the Network Browser.

The Network Browser will show concept labels in the chosen language if a standard label (or in the presentation parent-child network, a preferred label) exists in that language. If no such label exists, the element name will be displayed instead. Changing the language will also change the concept labels displayed in the search and comment views and concept title in the Details Area.

You can switch between networks in the taxonomy using the network drop down (fig. 2.2).

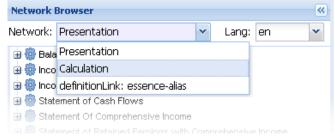


Figure 2.2: Network selection in the Network Browser.

2.2. The Details Area

When you select a concept in the Network Browser, its details will be shown in the Details Area. This pane contains three tabs – *Details*, *Relationships* and *Tree Locations* – giving you access to different aspects of the concept's definition.

2.2.1. The Details Tab

The *Details* tab in the Details Area shows the labels, references, XBRL attributes and custom item type information defined for the concept (fig. 2.3). If the taxonomy contains labels or references in a non-standard group (or extended link role in XBRL speak), a **Group** column will also appear in the relevant panel (labels or references). If only the Standard Role is used, this extra column will not be shown.

NOTE: The custom type information panel displays the details of *custom* types only. It will not show details of standard XBRL data types or types with complex content such as tuples.

Details Relationshi	ps Tree Loc	ations
Debt Instrument, Inter	rest Rate, Sta	ted Percentage
Labels		
Туре	Lang	Label
Standard Label	en-US	Debt Instrument, Interest Rate, Stated Percentage
Documentation	en-US	Interest rate stated in the contractual debt agreement.
References		
Туре	Reference	
Presentation Reference	Article Name Number Paragraph Publisher Section	5 Regulation S-X (SX) 210 22 SEC 02
Properties		
Property	Value	-
Name	Debtinstru	nentInterestRateStatedPercentage
Namespace	http://xbrl.u	s/us-gaap/2008-03-31
Data Type	us-types:pe	ercentitemType
XBRL Type	pureItemTy	pe
Substitution Group	xbrli:item	
Period Type	instant	
Abstract	false	
Nillable	true	
Custom Type Informa	tion	
Facet Name	Value	
whiteSpace	collapse	

Figure 2.3: The *Details* tab.

You can rearrange the three panels in this view by dragging and dropping. You can also collapse panels that are not of interest using the minimise () button in the top right hand corner or double clicking on the table header.

2.2.2. The Relationships Tab

The *Relationships* tab shows the calculation relationships defined for a concept (fig. 2.4). If a concept in the calculation has a balance attribute defined, it will be shown next to the concept as Dr for Debit or Cr for Credit.

Details Relations	ips Tree Locations	
ninterest Income		
alculations		
32010 - Statement - \$	atement of Income, Interest Based Revenue	
	Premiums Earned, Net	Cr
+	Fees and Commissions	Cr
+	Gains (Losses) on Sales of Assets	Cr
+	Principal Transactions Revenue	Cr
+	Noninterest Income, Other	Cr
+	Noninterest Income, Other Operating Income	Cr
	Noninterest Income	Cr
32001 - Statement - §	atement of Income, Interest Based Revenue	
	Premiums Earned, Net	Cr
+	Fees and Commissions	
+		Cr
	Gains (Losses) on Sales of Assets	Cr Cr
+	Gains (Losses) on Sales of Assets Gain (Loss) on Derivative Instruments, Net, Pretax	
+ +	Gain (Loss) on Derivative Instruments, Net, Pretax	
	Gain (Loss) on Derivative Instruments, Net, Pretax	Cr Cr
+	Gain (Loss) on Derivative Instruments, Net, Pretax Principal Transactions Revenue Noninterest Income, Other	Cr Cr

Figure 2.4: The *Relationships* tab.

2.2.3. The Tree Locations Tab

Concepts are often used in more than one place in a single XBRL taxonomy. The *Tree Locations* tab displays information relating to the current concept across the whole taxonomy (fig. 2.5). Direct children are shown in grey, direct ancestors are shown in black and occurrences of the current element are highlighted in gold. This allows you to review all occurrences, in all networks, of the current concept. Clicking on a concept in the Tree Locations tab will take you to its location in the Network Browser and open its details in the *Details* tab.

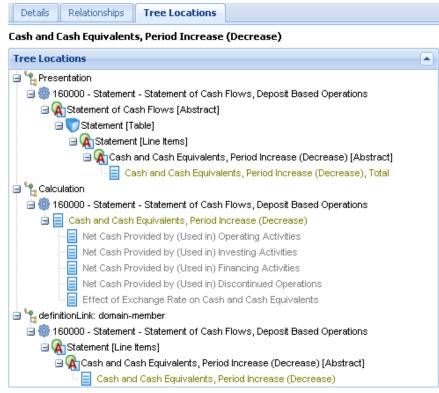


Figure 2.5: The Tree Locations tab.

2.3. Linking to Concepts

Every concept in Yeti has its own URL. This means that after browsing to a concept, you can save a link to it. You can embed direct links to different concepts in emails or other documents, as well as store locations to return to later.

2.4. Downloading a Taxonomy

To download the currently open taxonomy:

- 1. Taxonomy > Download
- 2. Click on **Download File**.
- 3. Save the taxonomy.

Chapter 3. Searching

Yeti provides a powerful search tool. The search tool is in the Tools Panel, next to the *Comments* tab (fig. 3.1). Search terms that you enter into the search box will be matched against any label or reference defined for a concept and results returned in order of relevance.

Tools					۲
Search Comments					
Assets	Search Reference	s			
Local Name	Element Label	Matched Value		Rank 🔻	
Assets	Assets	Assets		100%	
RegulatoryAssets	Regulatory Assets	Regulatory Assets		62%	
PreconfirmationAssets	Preconfirmation, Assets	Preconfirmation, Assets		62%	
PostconfirmationAssets	Postconfirmation, Assets	Postconfirmation, Assets		62%	
OtherAssets	Other Assets	Other Assets		62%	5
NonallowableAssets	Nonallowable Assets	Nonallowable Assets		62%	~
4	age Size 15 🕺 🔏 Highlight Match	es	Displaying matches 1	- 15 of 25	43

Figure 3.1: The Search tab.

The columns shown in the search results are sortable (e.g you can sort by Local Name instead of relevance if desired). The columns can also be rearranged by dragging and dropping. You can refine your search using the following techniques:

"+" in front of a word denotes a word that must appear in the results.

"-" in front of a word denotes a word that must not appear in the results.

"AND" between words denotes that both words must appear in the results.

"NOT" before a word denotes that the word must not appear in the results.

Double quotes around several words denotes an exact string that must be matched.

"*" is a wildcard that can be used to match parts of words.

"?" is a wildcard that can be used to match one character.

"~" can be added after a word to match words with similar spellings.

Table 3.1. Example Search Strings

Example Query	Results
Total Assets	Returns all concepts containing either the word <i>Total</i> or the word <i>Assets</i> . Concepts containing both will be ranked higher.
"Total Assets"	Returns all concepts containing the phrase <i>Total Assets</i> .
Total +Assets	Returns all concepts containing the word <i>Assets</i> . Those that also contain the word <i>Total</i> will be ranked higher.
-Total Assets	Returns all concepts containing the word <i>Assets</i> that do not also contain the word <i>Total</i> .
Asse*	Returns all concepts containing a word that starts with Asse.

Example Query	Results
Amoriti?e	Returns all concepts containing <i>Amorti?e</i> where ? is any single character. I.e. concepts containing either <i>Amortize</i> or <i>Amortise</i> will be matched.
Colour~	Returns all concepts containing a word that is similar to <i>Colour</i> . I.e. concepts con- taining either <i>Colour</i> or <i>Color</i> will be matched.

3.1. Advanced Searching

It is possible to restrict search results based on the contents of specific fields by prefixing the search term with the field name and a colon. The available fields are:

type: possible values are localname, label, reference.

role: the URI of a label or reference resource role. Can contain wildcard characters.

 $r_{P}x:$ text to search for within reference part with localname X. The "References" button will show a dialog to make this easier.

If no field is specified then all of the indexed text content is searched. These terms can be combined with other search terms to restrict the results further by means of the "AND" keyword. Such combinations cannot combine multiple types. See the type:reference example below.

Table 3.2. Advanced Search Strings

Example Query	Results
type:label	Returns all concepts which have one or more labels.
type:label AND Assets	Returns all concepts with a label contain- ing the word <i>Assets</i> .
role:http://www.xbrl.org/2003/role/verboseLabel	Returns all concepts with a verbose label.
role:http://www.xbrl.org/2003/role/*DisclosureRef AND Assets	Returns all concepts with any type of dis- closure reference containing the word <i>Assets</i> .
rp_Publisher:XBRL	Returns all concepts with a reference part called 'Publisher' containing the word <i>XBRL</i> .
type:reference AND Guarantee	Returns all concepts where a reference contains the word 'Guarantee', but not those where the word only appears in a label.

Clicking on a search result in the list of matches will open the Details Area for that concept and if it exists in the currently selected network, the Network Browser will scroll to show its location.

NOTE: The role URI for a label can be viewed by hovering over its type in the details area.

abels			
Туре	Lang Label		
Standard Laivel	en-US Fair Va	lue, Estimate Not Practicable, Reasons, Cash and Cash Equivalents	
Documentati http://www.x	brl.org/2003/role/	m.represents a discussion of the reasons why it is not practicable to estimate fair value for the indicated label ment (as defined). Such disclosure may relate to an individual financial instrument or a class of arms and ments.	
References			
References Type	Reference		

Figure 3.2: Viewing label role URI.

3.2. Shared Searches

Yeti includes a shared search feature. Review group managers and other administrators can create shared searches within review groups, which any user can then run. If any shared searches exist for the current review group, a list of them will be displayed at the top of the *Search* tab. Selecting a search from this list will place its query in the search box, and run it.

Tools			
Search Comments			
	Search	▼	
Local Name		FASB References	е
Cash		Label equity	ă
RealEstateInvestmentSubsidiariesCashAndOtherAssets		Label liabilities	F
RealestatelinvestrientsubsidiariescasriAndotrierAssets		New Concepts	e
DepositsNegotiableOrderOfWithdrawalNOW		New Concepts With References	e
FederalFundsPurchased			ге
FederalFundsSold			Fe
FederalHomeLoanBankAdvancesDisclosureTextBlock			Fe
FederalHomeLoanBankAdvancesGeneralDebtObligationsDis	closuresDu	ieDateEarliest	Fe
FederalHomeLoanBankAdvancesMaturitiesSummaryByInter	estRateTyp	e	Fed

Figure 3.3: Selecting a Shared Search.

Every shared search has its own URL. This means that after running a shared search, you can save a link to it. The link will reflect whether or not highlighting of search matches (see below) was turned on when you saved it. You can embed direct links to different shared searches in emails or other documents, as well as store them to return to later.

3.3. Highlighting Search Matches

It is possible to highlight the concepts matched by the most recent search in the Network Browser. Highlighting is off by default and can be turned on and off using the *Highlight Matches* button at the bottom of the *Search* tab.

The highlighting uses two colours: bright yellow to indicate concepts which matched the search, and pale yellow to indicate unexpanded groups or concepts which did not match, but have descendant concepts which did match.

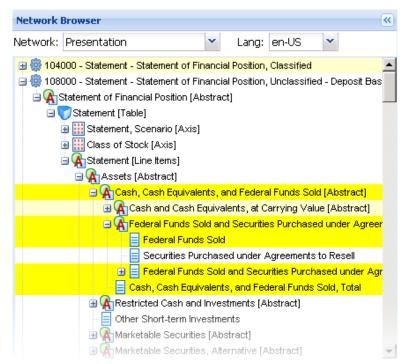


Figure 3.4: Search Match Highlighting in the Network Browser.

3.4. References Search

Yeti includes a dialogue that enables searches on combinations of reference parts. The References Search dialog can be opened from the search tab with the *References* button.

References Se	earch	×
References search allows field-specific searches.		
Search within reference parts using the fields below.		
Publisher:	1	
Name:		
Topic:		
SubTopic:		
Section:		
Paragraph:		
Subparagraph:		
URI:		
Number:		
Article:		1
	OK Cano	e

Figure 3.5: The References Search dialog.

The references search dialog is populated with a list of reference parts that are used in the taxonomy. By entering search terms in the corresponding text fields, it is possible to search for concepts by the values

of reference parts. All reference parts which have search terms are required to match for a concept to be displayed.

NOTE: Reference part searches cannot be combined with searches in labels or concept names. No concepts will be returned.

Chapter 4. Commenting

Yeti's commenting functionality will only be available as described below if the following criteria are met:

- A suitable licence has been installed by your system administrator.
- The taxonomy is open for commenting (set by Yeti administrators).
- You have contributor (or higher) status within the review group (set by Yeti administrators).
- You are logged in.

If a subset of these conditions are met (e.g. the taxonomy is open for comments, but you have *Reviewer* status) then some of the following will still apply.

Comments can be added either to a concept in general, or to a specific label, reference, property or custom item type facet. Adding a new comment to any of these starts a new *issue*. It is also possible to make comments on existing issues.

4.1. Adding New Comments

See also Making Comments on Existing Issues.

In the Details Area for a concept, there is an Add Comment icon (\clubsuit) next to every component which is available for commenting (see fig. 4.1).

Details Re	elationships	Tree Locations	
Common Stock	, Dividends,	Per Share, Declared	Ģ
Labels			
Role	Lang	Label	
Standard Label	en-US	Common Stock, Dividends, Per Share, Declared	
Documentation	en-US	Aggregate dividends declared during the period for each share of common stock outstanding.	Ģ
References			
Role	Referen	ce	
Presentation Reference	Article Name Numbe Publish Section		Ç.

Figure 4.1: Add a comment.

To add a new comment, click on the **Add Comment** icon next to the component you wish to comment on. This will open a dialog into which you can enter your comment (fig. 4.2).

	Add Comment	×
Enter your	comment below.	
Subject:	ACT II Scene 2.	_
-		_
May prov Romeo a	of love, by summer's ripening breath, e a beauteous flower when next we meet. nd Juliet. ACT II Scene 2. William Shakespeare	
	Add Comment Cancel	

Figure 4.2: The *Add Comment* dialog.

NOTE: If Moderating Comments has been set up for the review group, and you have *contributor* status, your comment will not be visible until it has been accepted by a moderator.

4.2. Viewing Comments

Clicking on the *Comments* tab next to the *Search* tab in the Tools Panel displays a list of all comments in the currently open taxonomy, grouped by issue (fig. 4.3). The list can be filtered to show only comments for the concept currently open in the Details Area by checking the box in the tab header (see fig. 4.3).

ssu	Subject	Author	Concept Name	Last Reply	Component	Replies 🔻	Status	Assignee
1	Act 1, Scene V	Romeo Montague	Accident and H	Dec 2, 2008, 1:33 pm	Concept	6	New	
lf I pro	ofane with my unw	orthiest hand This h	oly shrine, the gent	tle fine is this: My lips, two blush	ing pilgrims, ready sta	nd To smoot	h that rough touch	with a tender kiss.
2	Act 2, Scene II	Juliet Capulet	Other Accounts	Dec 2, 2008, 1:33 pm	Concept	4	New	
O Roi	meo, Romeo! where	efore art thou Rome	o? Deny thy father	and refuse thy name; Or, if thou	wilt not, be but sworr	n my love, A	nd I'll no longer be a	Capulet.
4	Act 3, Scene V	Juliet Capulet	Accounting for	Dec 2, 2008, 4:04 pm	Concept	1	Assigned for re	Romeo Montague
	re no pity sitting in t t, make the bridal b		es into the bottom of	f my grief? O, sweet my mother,	cast me not away! De	elay this mar	riage for a month, a	week; Or, if you
3	Act 3, Scene I	Romeo Montague	Accounting Cha	Dec 2, 2008, 1:33 pm	Concept	0	New	
			and This had been in	s the woe, others must end.				

Figure 4.3: The *Comments* tab in the Tools Panel.

Clicking once on an issue in the *Comments* tab will open the concept to which it relates in the Details Area, with a marker indicating which component it applies to. Double clicking on an issue in the *Comments* tab will open the issue in a dialog (fig. 4.4). All comments made on the issue will be shown.

Act 1, Scene V	\mathbf{X}
Author: Romeo Montague Subject: Act 1, Scene V Created: Dec 14, 2011, 2:59 pm Status: New Issue #: 1	
If I profane with my unworthiest hand This holy shrine, the gentle fine is this: My lips, two blushing pilgrims, ready stand To smooth that rough touch with a tender kiss.	
Reply By: Juliet Capulet Created: Dec 14, 2011, 3:00 pm	
Good pilgrim, you do wrong your hand too much, Which mannerly devotion shows in this; For saints have hands that pilgrims' hands do touch, And palm to palm is holy palmers' kiss.	Ш
Reply By: Romeo Montague Created: Dec 14, 2011, 3:01 pm	
Have not saints lips, and holy palmers too?	
Reply By: Juliet Capulet Created: Dec 14, 2011, 3:01 pm	
Ay, pilgrim, lips that they must use in prayer.	
Reply By: Romeo Montague Created: Dec 14, 2011, 3:02 pm	-
Delete Issue Reply Close	

Figure 4.4: The View Issue dialog.

If a component already has comments, the number of existing issues will be shown to its right. Clicking on this number will pop up a list of the five most recently added or changed issues (fig. 4.5). Clicking on an issue on this list will open the issue as in figure 4.4.

Relationships	Tree Locations		
ash Flows, Dire	ct Method [Abs	tract]	
	Lang	Label	
Label	en-US	Operating Cash Flows, Direct Method [Abstract] Act 3. Scene V Juliet Capulet	4 🗣
Documentation en-U		The statement of cash flows must classify cash r Act 2, Scene II Romeo Montague according to whether they arise from operating, ir Act 4, Scene V Romeo Montague Under the direct method, enterprises report cash Act 5, Scene III Romeo Montague	
		payments and their arithmetic sum (the direct method). The direct method requires classification of operating expenses into classes that provide a meaningful breakdown of operating receipts and payments and usually includes the classifications cash collected from customers, interest and dividends received, other cash received, cash paid to employees, cash paid to suppliers, interest paid, income taxes paid and other operating payments.	A
;			
	Reference		
	Name Number Paragraph	Statement of Financial Accounting Standard (FAS) 95 27	
	Label	ash Flows, Direct Method [Abs Lang Label en-US tation en-US Reference Name Number	Lang Label



4.3. Making Comments on Existing Issues

When viewing an issue, you can make a comment on it by clicking **Reply** (fig. 4.4). This will open a dialog similar to figure 4.2, with the subject line already filled in. Clicking **Add Comment** will add your comment to the selected issue.

4.4. Changing the Status of an Issue

Review group managers and other administrators have permission to change the status of an issue to any of the following:

- New The default status given to an issue when the first comment is made.
- Assigned for review
- Assigned for implementation
- Closed
- Closed wontfix
- Closed implemented
- Closed duplicate

To change the status of an issue:

- 1. Open the issue from the comments tab (see Viewing Comments).
- 2. Click Reply.
- 3. Enter a message (usually describing your action) in the text box.
- 4. Select a status from the drop down list (see fig. 4.6).
- 5. If you have chosen *Assigned for review* or *Assigned for implementation* you will also need to assign the issue to a user in the current review group. Start typing their name or email address into the box to see a list of possible matches and select the correct one.
- 6. Click Add Comment to submit your change and close the dialog.

	Add Comment	×
Enter your	comment below.	
Subject:	Act 1, Scene V	
Assigning	to Romeo for review.	
Status:	Assigned for review	ĺ
Assignee:	Romeo@example.com	
	Add Comment Cancel	

Figure 4.6: The *Reply to Comment* dialog for changing a comment's status.

4.5. Deleting Issues

To delete an issue (all comments made on the issue will be deleted):

- 1. Open the issue (see Viewing Comments).
- 2. Click Delete Issue.
- 3. Click **Delete** again on the confirmation dialog.

4.6. Moderating Comments

If moderation of comments has been set for the review group (set by a Yeti Administrator), users with *Review Group Manager* status or higher will need to approve any comments made by users with *Contributor* status.

The Viewing Comments tab in the Tools Panel will show an additional column, *Moderation*, which indicates which issues have comments pending moderation, or have already been moderated and approved (fig. 4.7).

Show	only comments for	current concep	t						
lssue #	Subject	Author	Concept	Last Reply	Component	Replies	Status	Assignee	Moderation
10	Act 2, Scene II	Juliet Capulet	Quarterly Financ	Jan 21, 2009, 4:38 pm	Label	0	New		Pending
This bu	d of love, by summ	ner's ripening br	eath, may prove a	beauteous flower when i	next we meet.				
)	Act 3, Scene V	Juliet Capulet	Extraordinary Iter	Jan 21, 2009, 4:36 pm	Reference	0	New		Approved
	e no pity sitting in th ou do not, make the		sees into the botto	n of my grief? O, sweet n	ny mother, cas	st me not a	way! Delay t	his marriage for a	i month, a week;
	Act 2, Scene II	Juliet Capulet	Year-End Adjust	Jan 21, 2009, 4:35 pm	Label	0	New		Pending
O Rome Capulet		ore art thou Ror	neo? Deny thy fath	ner and refuse they name	Or, if thou w	ilt not, be k	ut sworn my	love, And I'll no l	onger be a

Figure 4.7: *Comments* tab with comments to moderate.

To moderate a comment:

- 1. Open the issue which has comments pending moderation by double clicking on it in the *Comments* tab.
- 2. Comments requiring moderation will have a *Moderate* panel above them (see fig. 4.8). Select either **Approve** (to approve the comment, making it visible to all users with *Trusted Contributor*, *Contributor* or *Reviewer* status) or **Reject** (to delete the comment from the issue).
- 3. Click Moderate.
- 4. Click **Close** to close the dialog.

	Act	II Scene 2.		×
Author: Julie Subject: Act I Created: Dec Status: New Issue #: 2	I Scene 2. 14, 2011, 3:07 pm			
Moderate	Approve	Reject	Leave	
	Moderat	e Delete Issue	Reply Clo	ose

Figure 4.8: Moderate a comment in the *View Issue* dialog.

4.7. Exporting Comments

To export all comments in the currently open taxonomy to an Excel spreadsheet:

- 1. Taxonomy > Export Comments
- 2. Click on Download File.
- 3. Save the Excel file.

Chapter 5. Editing Your User Profile

When logged in, you can view and update your user details from the **Profile** menu on the menu bar.

5.1. Edit Your Details

To edit your details, click **Profile > User Details**. From here you can set a new password and choose whether or not to receive email notification about new comments (fig. 5.1). If the email notification option is checked, you will receive an email every time a comment is made on a taxonomy for which you have commenting privileges. You need to explicitly belong to the review group for this (i.e. project administrators and super users will not receive notification of comments unless they also have a manager, trusted contributor or contributor role within the group).

If you are a Review Group Manager and you have chosen to receive email notification about new comments, you will also receive email notification about comments pending moderation.

If the site options allow it, you will also be able to update your name and email address (also used as your username). If these fields are disabled, you will need to contact your review group manager to update your details.

	User Details	×
Please edit the details you w	vish to update.	
First Name:	Romeo	
Last Name:	Montague	
Email Address:	Romeo@example.com	
lf you wish to change your pa password.	assword, please enter and confirm a new	
Password:		
Confirm Password:		
Receive email notification	about new comments	
	Update Cancel	

Figure 5.1: The User Details dialog.

NOTE: If you are logged in with your LDAP username and password you will not be able to change your details as these come from an external directory. The only option you will be able to update in the *User Details* dialog is your preference for notification emails.

5.2. Configure Review Group Membership

To edit which Review Groups you are a member of, click **Profile > Review Groups**. This will open a dialog with a list of publicly available Review Groups to which you can choose to subscribe or unsubscribe by checking (or unchecking) the checkboxes (fig. 5.2). The role you will be given when you subscribe to a new Review Group is displayed in the dialog. This will either be Reviewer (read only), Contributor (able to make comments), or Trusted Contributor (able to make comments without them being moderated by a review group manager) and is set by a Yeti Administrator. Clicking **Update** will save your changes. The project to which each Review Group belongs is displayed in brackets before the Review Group name.

	Review Group Member	rship		×
Seleo	t the groups that you wish to participat	e in.		
		Charle All	Uncheck All	
			OHCHECK AII	
	Review Group	Role		
	(Descartes) Philosophy Students	Reviewer		
	(Shakespeare) Drama Students	Reviewer		
	(Shakespeare) English Students	Contributor		
			Canad	
		Update	Cancel	_

Figure 5.2: The *Review Group Membership* dialog.