PROJECT REVIEW

USER GUIDE

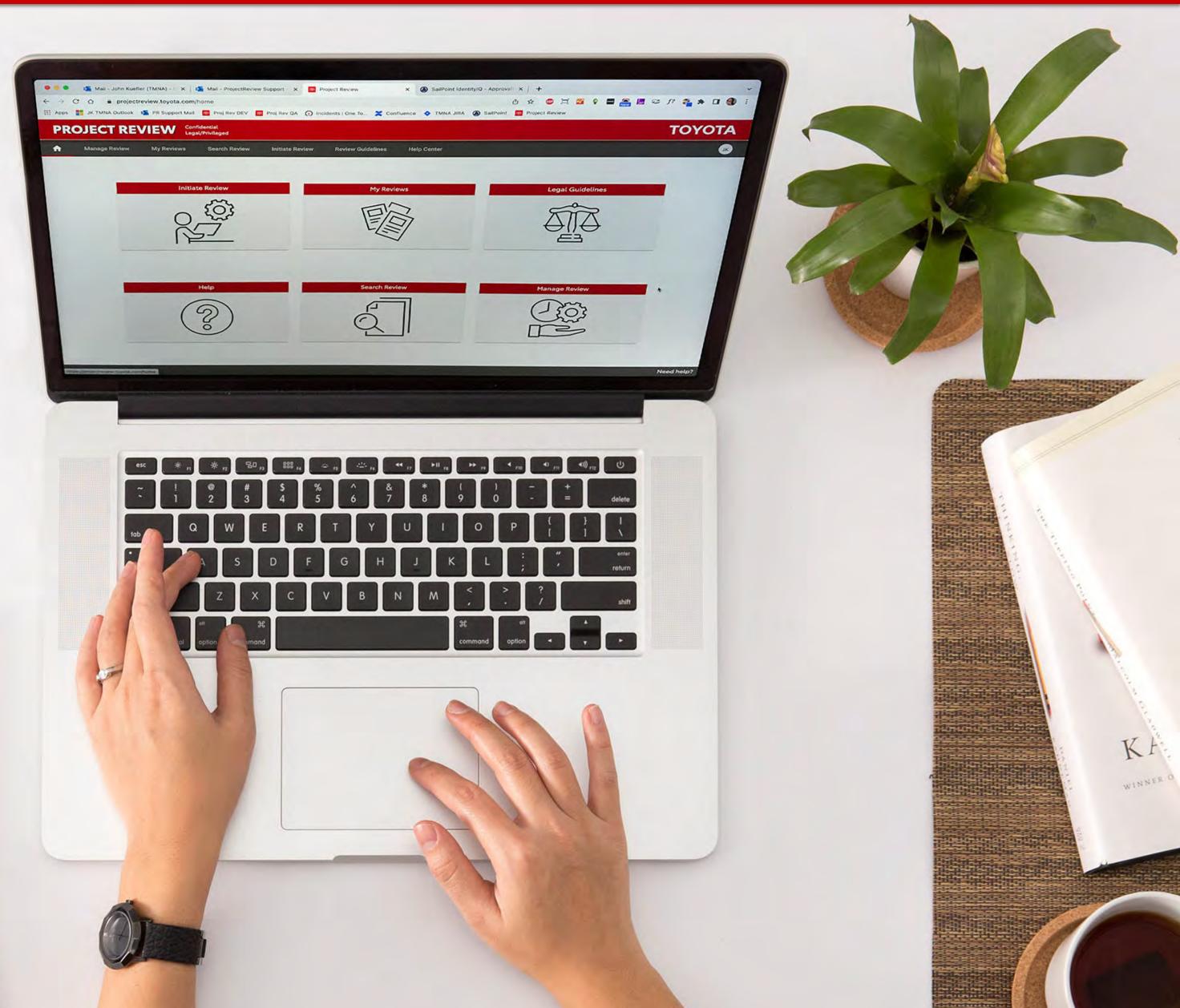
projectreview.toyota.com

Instructions for

- Review Leaders
- Reviewers
- Agencies

For help contact projectreview.support@toyota.com





CONTENTS

3 OVERVIEW

- 3 Introduction
- 4 User Types and Roles
- 5 How Reviews Work
- 6 Important Terms: Completing vs. Closing

7 REVIEW LEADERS

- 8 Initiating a Review
- 14 Managing a Review
- 15 Closing a Review
- 16 Gathering Reviewers' Feedback
- 17 Sending Feedback to Agency
- 18 Starting a New Round
- 19 Archiving Reviews
- 20 Reactivating Archived Reviews

21 REVIEWERS

- 22 Providing Feedback
- 26 Adding or Removing Legal Reviewers

27 AGENCIES

- 28 Agency Basics
- 29 Initiating a Review
- 35 Receiving Feedback
- 36 Starting a New Round

37 HELPFUL FEATURES

- 38 Navigation
- 39 Legal Guidelines
- 40 Search
- 41 Your Profile & Help Requests

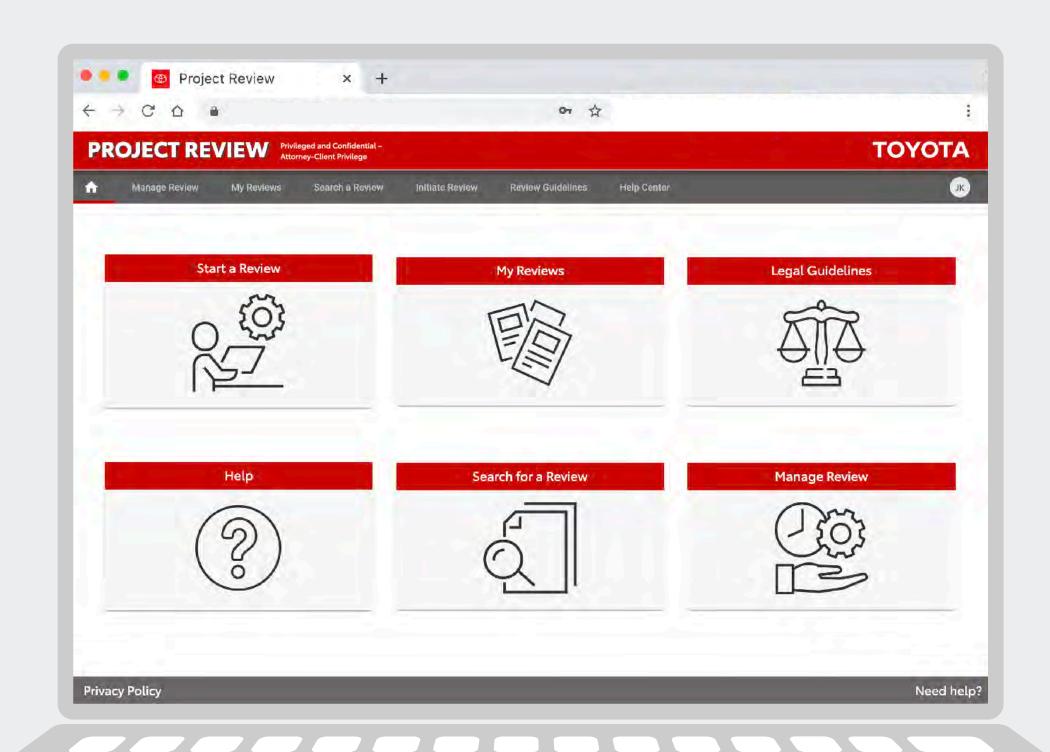
Overview: Introduction

The Project Review system is the official place to submit Toyota and Lexus materials to TL1 for legal review.

Use the Project Review system to submit all advertising and marketing communications materials or any other consumer-facing copy, press releases or similar documents for legal review. This includes:

- Materials created at headquarters, in the field, or by Toyota or Lexus advertising agencies
- TV, radio, print, brochures, internet copy, social media, websites, emails, etc.
- Sales training materials used by dealers

See more details in the Review Guidelines section of the Project Review site.



Overview: User Types and Roles

It's important for each user type to understand their unique role. Each has different access privileges in the system.

REVIEW LEADERS

Toyota or Lexus associates who manage reviews

Review Leaders initiate new reviews and subsequent review rounds, upload documents to be reviewed, close reviews after deadlines pass, gather and consolidate feedback (and send feedback to agencies if applicable).

REVIEWERS

Typically the legal staff (but can also be any corporate associate)

Attorneys (or Corporate Reviewers) download documents being reviewed (and optional reference documents) and after review, they provide feedback by uploading annotated documents and/or entering their feedback in a comment box.

AGENCIES

Authorized external partners

Agency users can initiate (but not publish) reviews. Or, Review Leaders can initiate a review and invite an agency user to upload the content. Agencies cannot receive feedback directly — a corporate Review Leader must close the review, consolidate legal feedback and send it to the agency.

Overview: How Reviews Work

Email

Notification



Review Leader or Agency Initiates Review

- Enter project description
- Assign Reviewers
- Upload document to be reviewed



 Publish (only corporate Review Leaders can publish, not agencies)



Reviewers **Provide Feedback**





- Annotate the document and/ or enter their feedback in a comments field
- Mark approval status, e.g., approved, approved with comments, not approved, legal advice given



Review Leader Closes Round

- Downloads Reviewers' annotated document(s) and/or reads comments
- Consolidates feedback
- Sends feedback to agency via Project Review
- Starts next round (if needed)



Important Terms to Understand: Completing vs. Closing

"COMPLETING" A REVIEW

Reviewers:

See page 25 for details about "Completing" a review.

When individual reviewers finish providing feedback, they click the "Finished Reviewing This Round" button. Once they have completed the round, reviewers can no longer edit their comments. (This ensures that other reviewers and Review Leaders know there will be no more comments from users who have completed reviews.) Once reviewers click "Review Complete" their comments can be viewed by other users assigned to that review.

"CLOSING" A REVIEW

Review Leaders:
See pages 15-18 for details about "Closing" a review.

It is the Review Leader's job to "Close" a review when reviewers have completed it and/or when the deadline passes. (A review can be closed at any time even if all reviewers have not completed it.) Only a Toyota corporate employee can act as a Review Leader — agency users cannot close reviews (nor can agencies publish reviews or gather reviewer feedback as explained on page 4).

Closing reviews is a manual task and there is no notification email reminding Review Leaders to do it. Agencies are often anxiously awaiting feedback. If agency users have not received feedback when expected, they should contact the Review Leader and ask them to close the round and send them the feedback.

PROJECT REVIEW

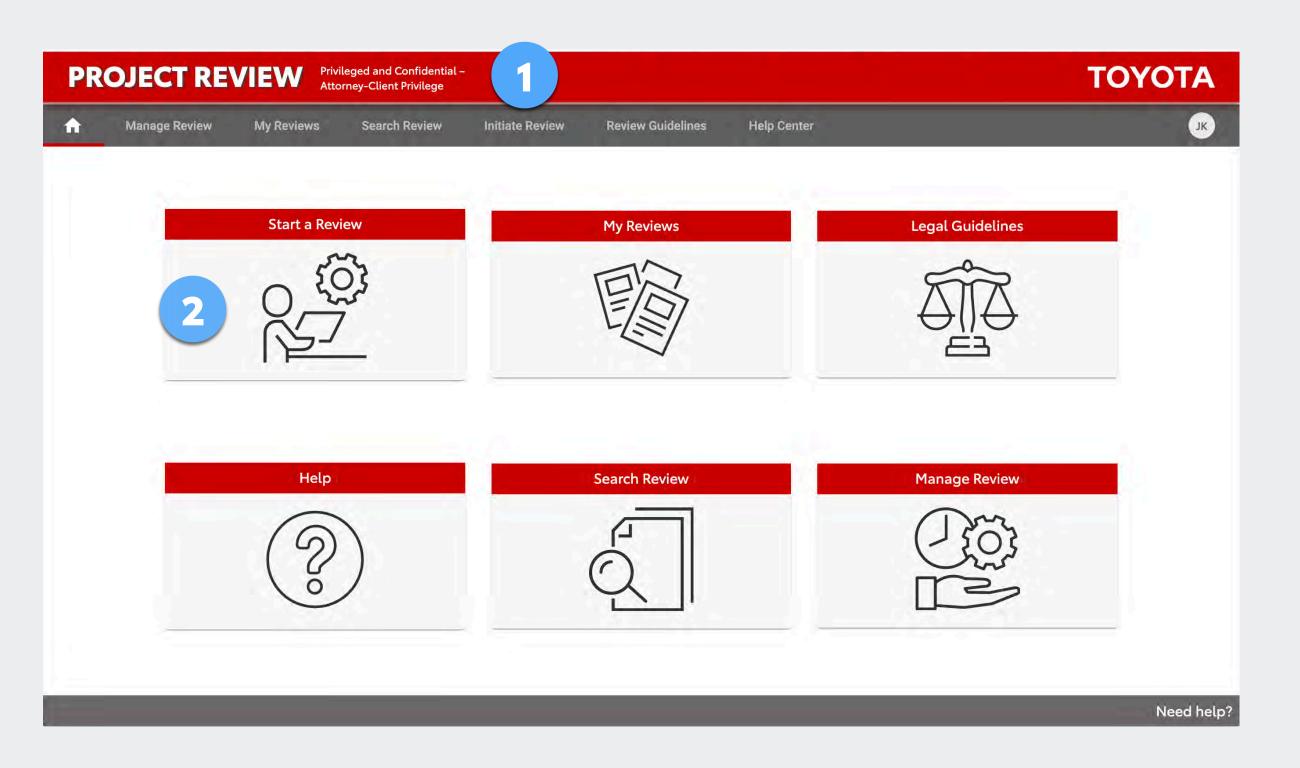
USER GUIDE

REVIEW LEADERS

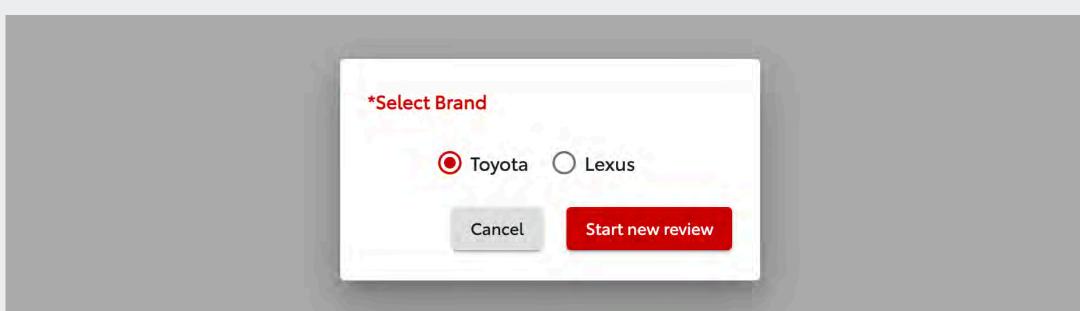
- Initiating a Review
- Managing a Review
- Closing a Review
- Gathering Reviewers' Feedback
- Sending Feedback to Agency
- Starting a New Round
- **Archiving Reviews**
- Reactivating Archived Reviews







- 1 To initiate a new review, use the *Initiate Review* tab.
- 2 Or, use the Start a Review icon.

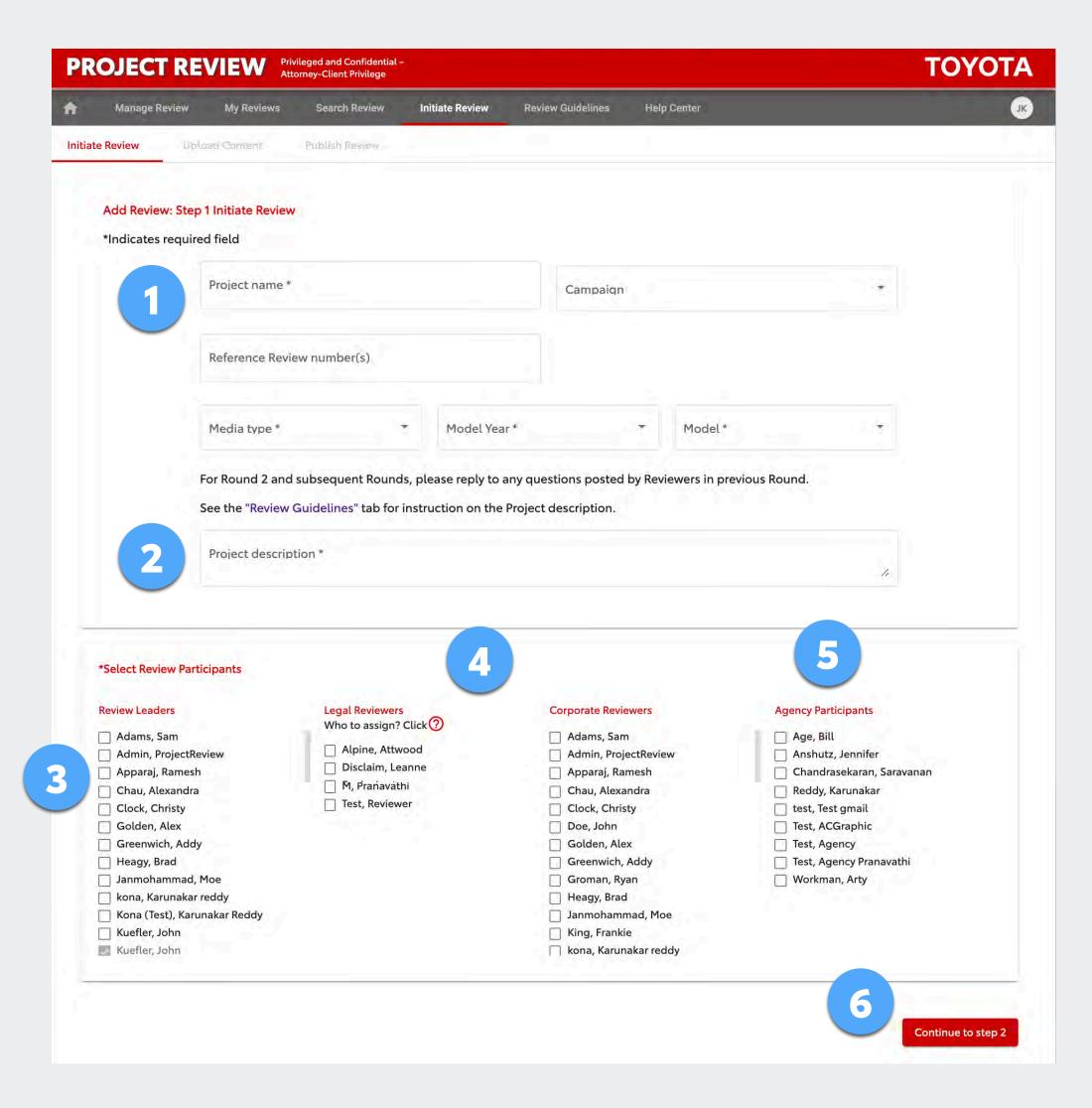


Your profile is assigned to the Toyota brand, the Lexus brand, or both. If you are assigned to both you will choose which brand to use for the review. If you need access to a brand to which you are not assigned, submit your request to Support by using the *Need help?* link in the footer.

Step 1 – Provide Information and Select Reviewers

- 1 Enter the required information.
- Give a detailed description of what you are submitting, how it will appear to a consumer and what you need the attorneys to review (highlighting new or changed copy can be very helpful). Attorneys need the full context to give proper legal advice. See the *Review Guidelines* tab for more instructions.
- You will automatically be selected as the Review Leader. Select at least one additional Review Leader who can manage the review in your absence.
- Select Legal Reviewers (click ? for help selecting the correct attorneys) and/or Corporate Reviewers (if any*).
- Select Agency participants (so you can send them feedback through Project Review and/or have them upload the document to be reviewed).
- 6 Click Continue to Step 2.

9



*Typically, Legal Reviewers are selected. However, Review Leaders may also select Corporate Reviewers if their feedback is needed.

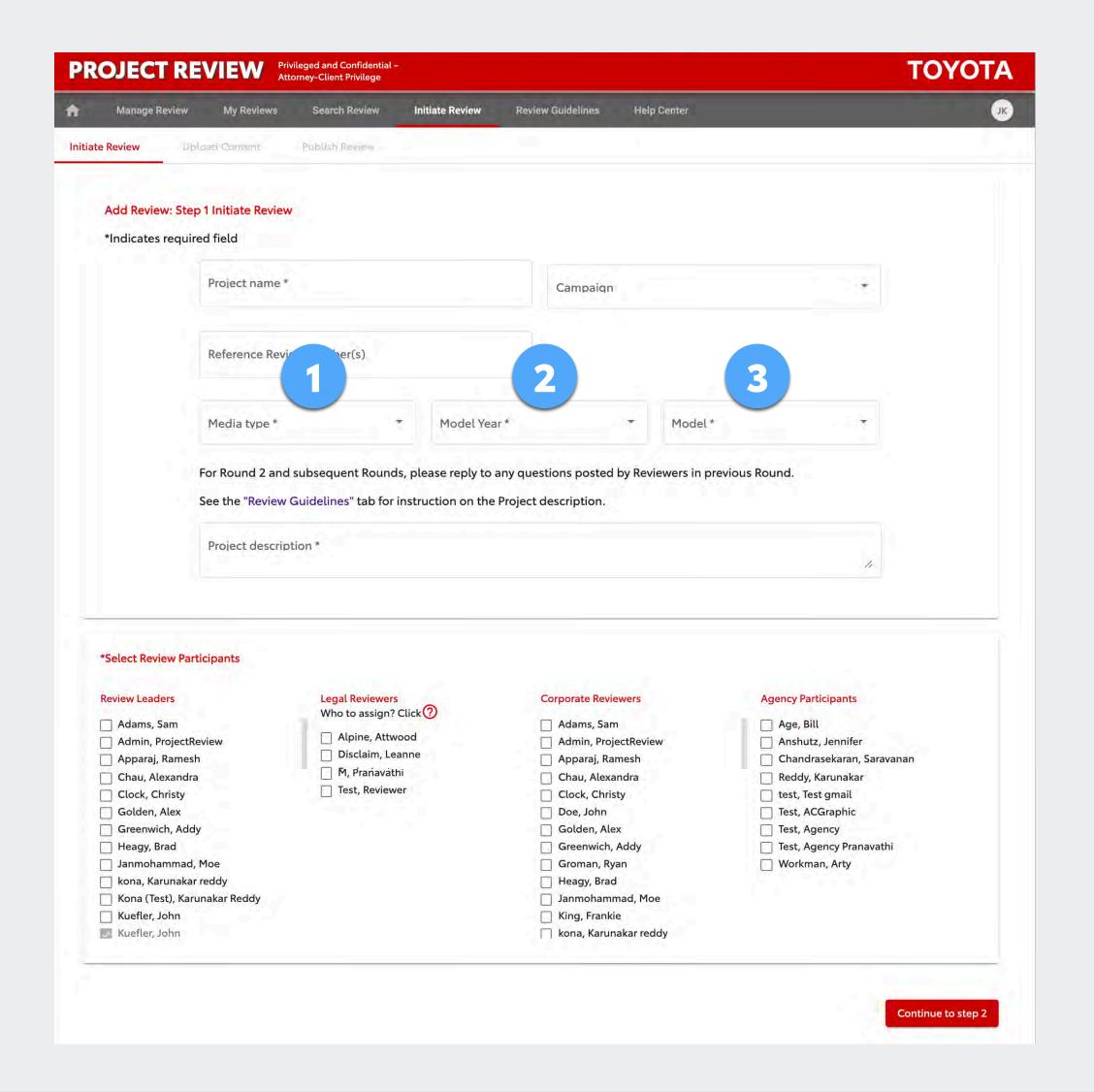
Step 1 – Media Type, Model Year, Model

If you require a:

- 1 Media Type
- 2 Model Year
- 3 Model

And it is not available on the current menus, please contact support using the *Need help*? link at the bottom of the site or email the support team at projectreview.support@toyota.com.

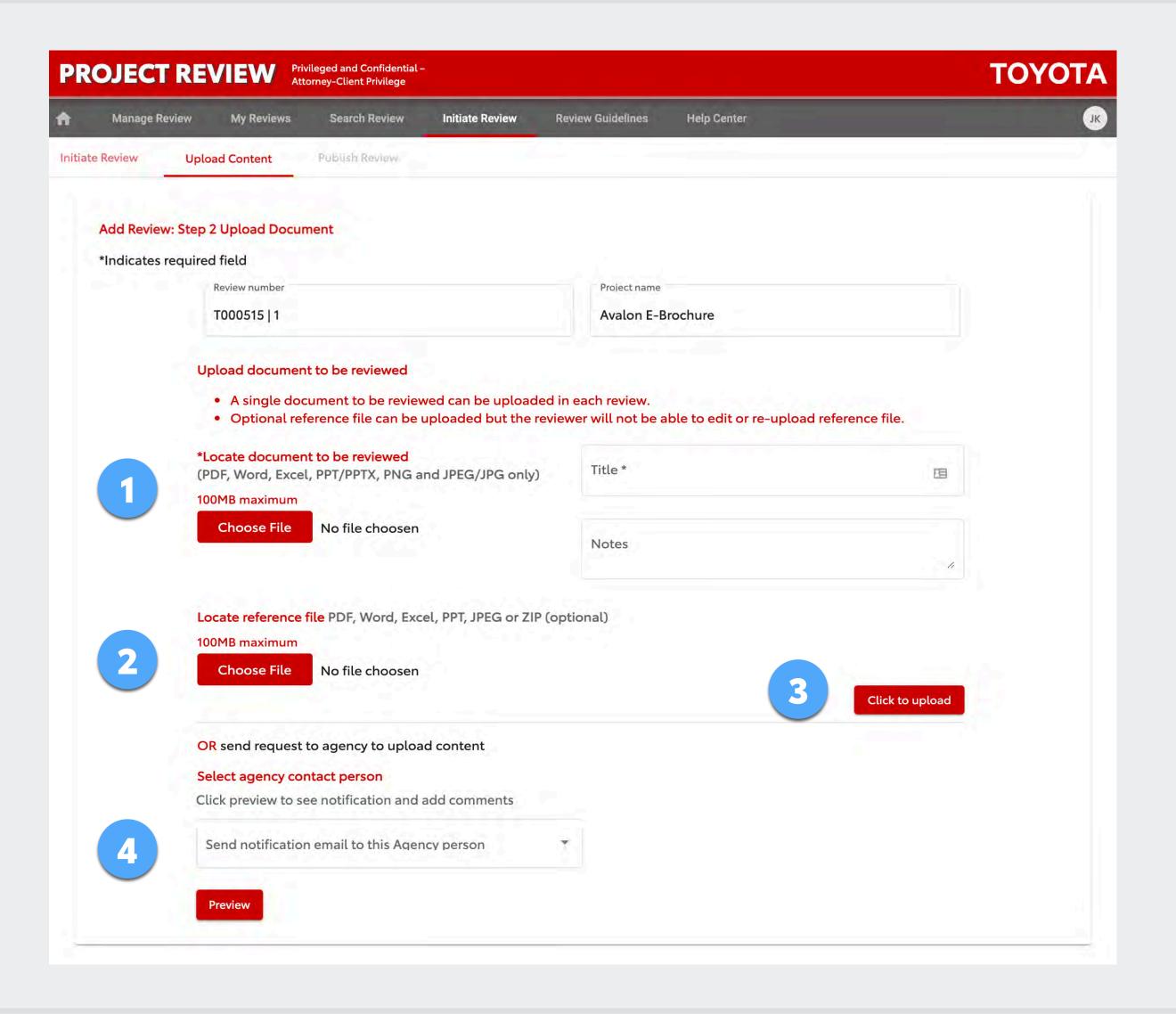
Provide the details for what you need and support will add it to the menu(s).



Step 2 – Upload Content

- Upload the document to be reviewed (PDF, Word, Excel, PPT/PPTX, PNG and JPEG/JPG only), give it a title and add optional notes. (See notes about video files on next page.)
- Attach a reference document if desired (this is not the document to be reviewed). If you have multiple reference documents you can zip a folder containing them all.
- 3 Click to upload; after confirmation go to Step 3.
- Select an agency user (assigned in Step 1) and invite them to upload the copy for you. Click Preview and you'll see the message the system will send them (which you can edit, if desired).

 If you choose this option, you'll get an email after the agency uploads the file. Then you'll proceed as described on page 13.



Step 2 - Upload Content: Videos (and Other File Formats)

Only PDF, Word, Excel, PowerPoint, PNG and JPEG files can be uploaded as documents for review. Native video files cannot be uploaded directly to the Project Review site. There are two ways to handle videos (or audio or other formats).

Option 1

Place a link to the video in a Word document. Be sure the link won't expire so the video is available indefinitely. If a password is required to access the video, include that in the document along with the video link and any other notes for the reviewers.



Option 2

Place the video file in a PowerPoint document. Limit this to one video per PowerPoint. And, be aware that uploading very large files may take a considerable amount of time, depending on your connection speed.



Upload the Word document with the video link or the PowerPoint with the embedded video as described on the page 11.

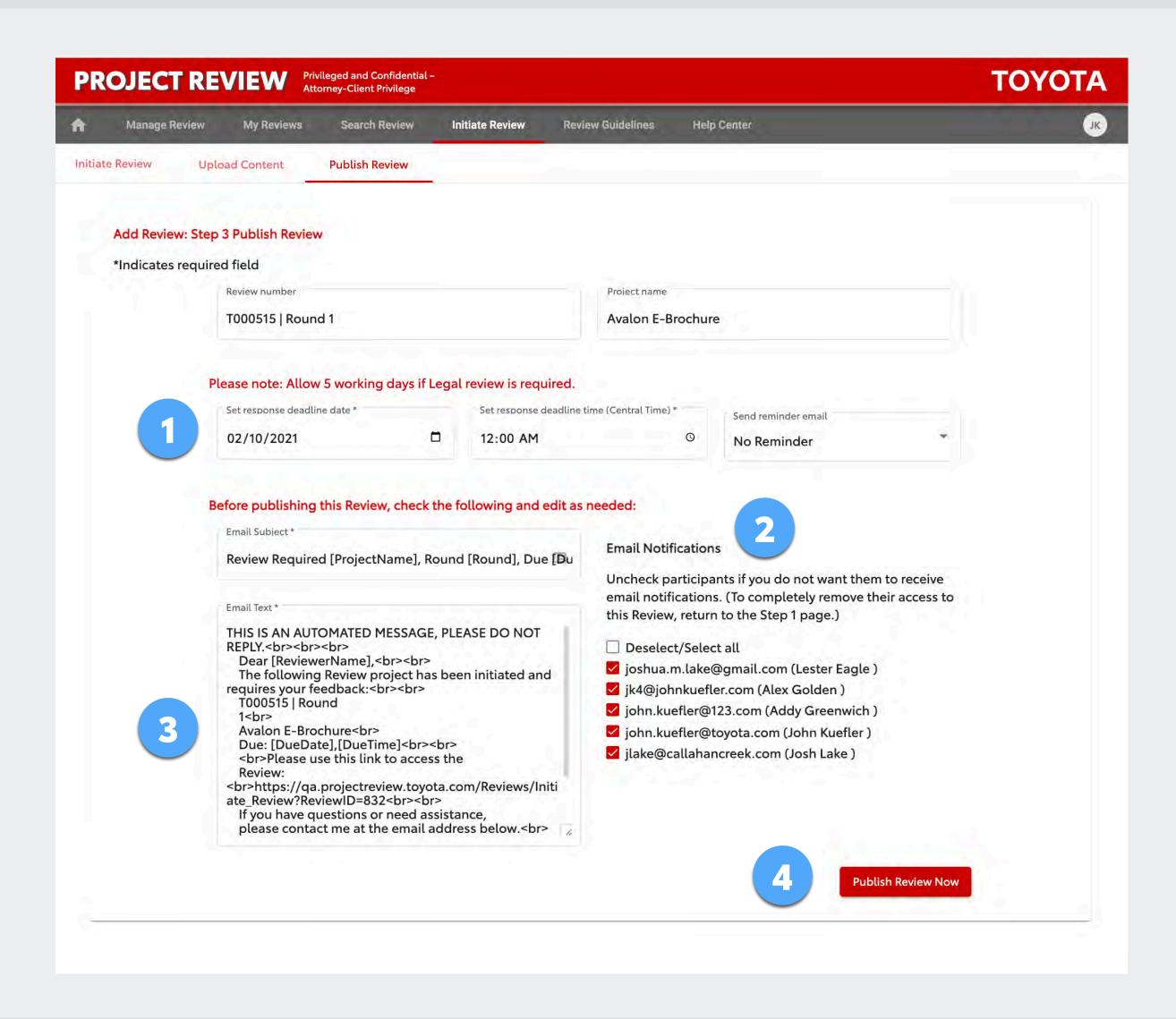
Step 3 – Publish

The deadline will default to 5 working days (the minimum required by Legal).

If you need it faster, shortening the due date will require you to explain why an earlier deadline is necessary. Enter a brief explanation.

You can set optional reminders for Reviewers.

- All participants will receive an email notification by default. Deselect users here if you don't want them to receive the notification.
- The system generates a standard message asking Reviewers to provide feedback. You can edit the standard text, if desired (but don't remove the link to the review).
- When you click Publish Review Now, the notifications are sent and review goes live.

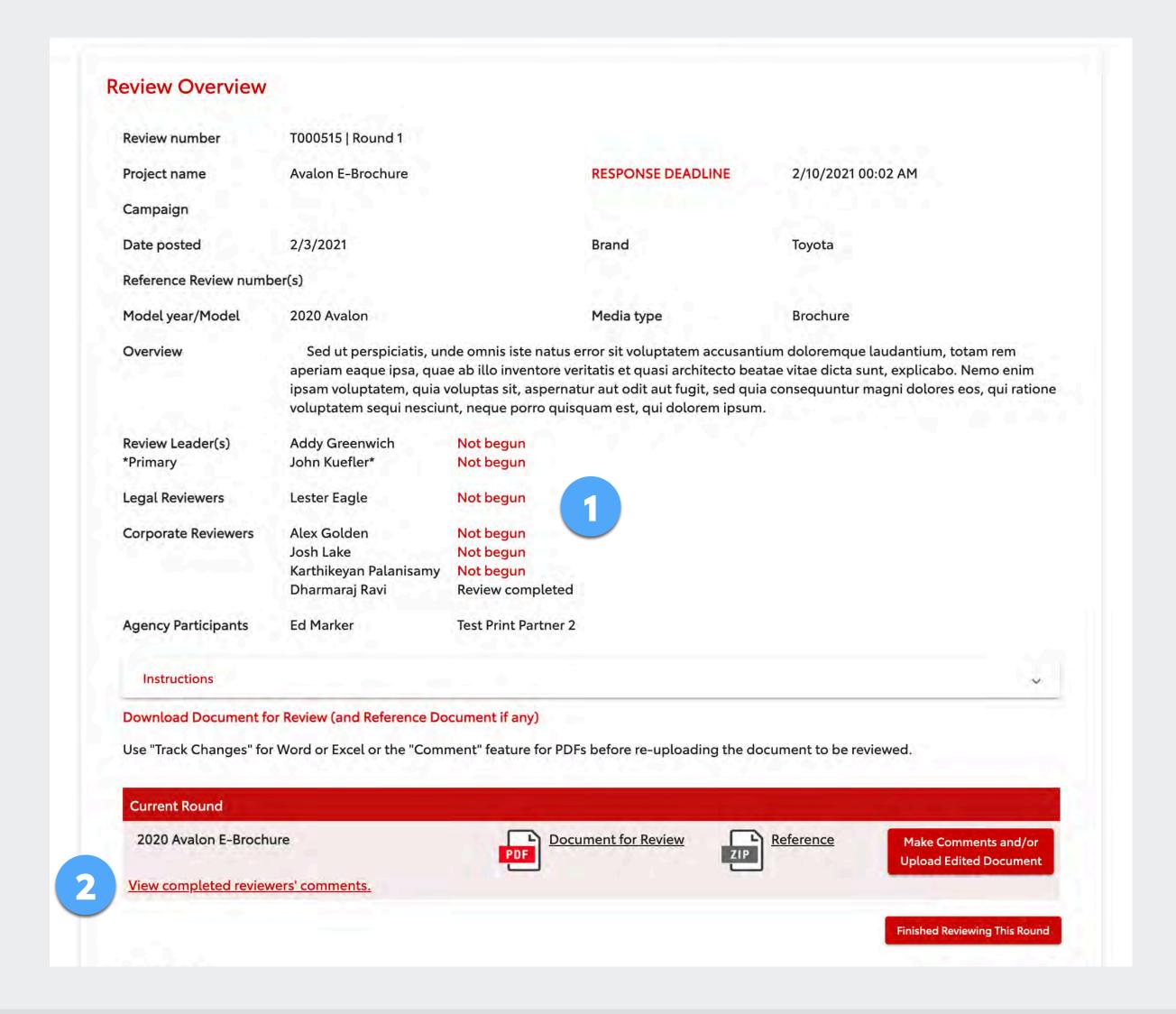


REVIEW LEADER: MANAGING A REVIEW

Next...

The Reviewers will log in and leave their comments. They have the option to download the document, annotate it, and re-upload it to Project Review; **and/or**, they may read it and leave feedback in the comments box on the Project Review site.

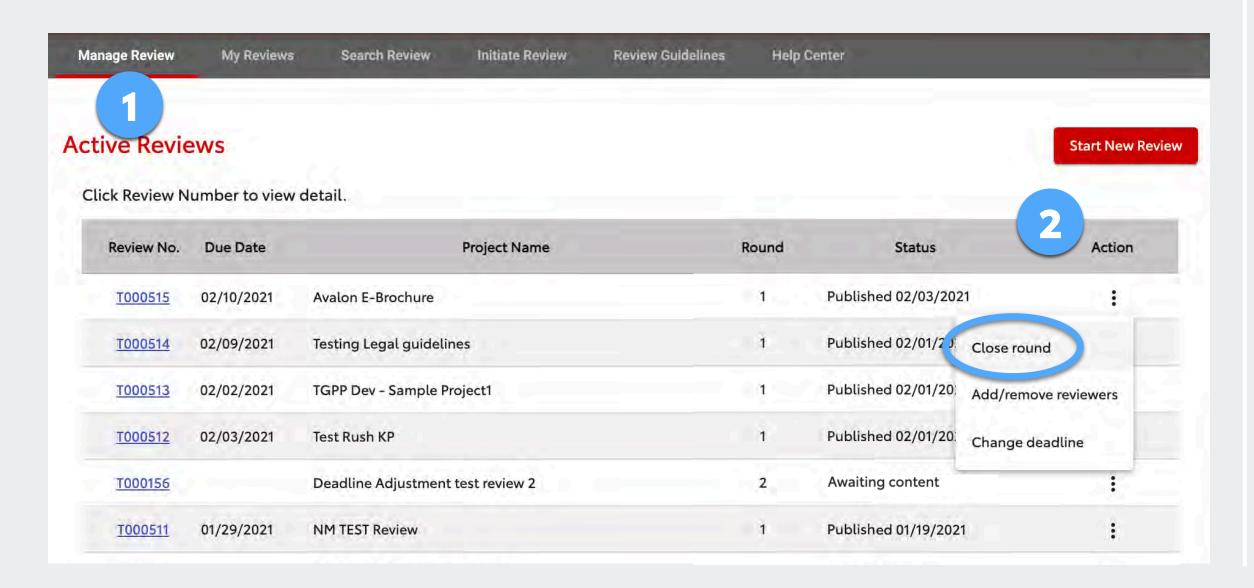
- Locate the review on your *My Reviews* tab. You can see each Reviewers' progress on the Overview page.
- You can see *completed* Reviewers' overall comments here, but be aware that this is <u>only</u> completed Reviewers, so it will <u>not</u> include all the feedback until all Reviewers have marked the review complete.
- IMPORTANT! When all Reviewers finish, the Review Leader must <u>close</u> the review (see next page).



REVIEW LEADER: CLOSING A REVIEW

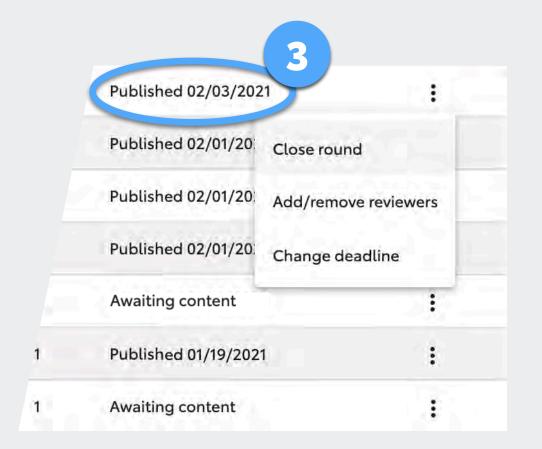
It's **very important** to <u>close</u> a review when the Reviewers finish. Closing the review triggers the system to create a spreadsheet containing all Reviewers' comments and it prevents Reviewers from adding further comments.

- 1 Click the Manage Review tab.
- Find the review you want to close and in the Action column, click the menu icon and select Close round.

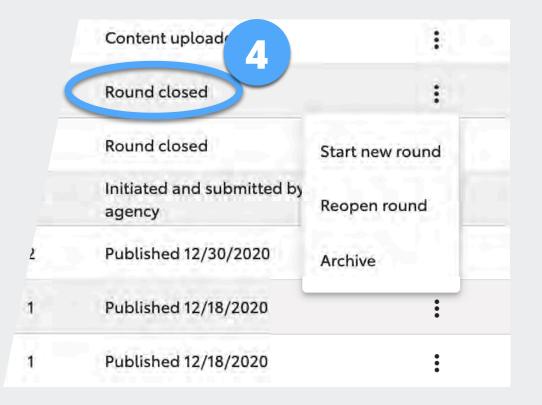


Other Functions of the Action Menu

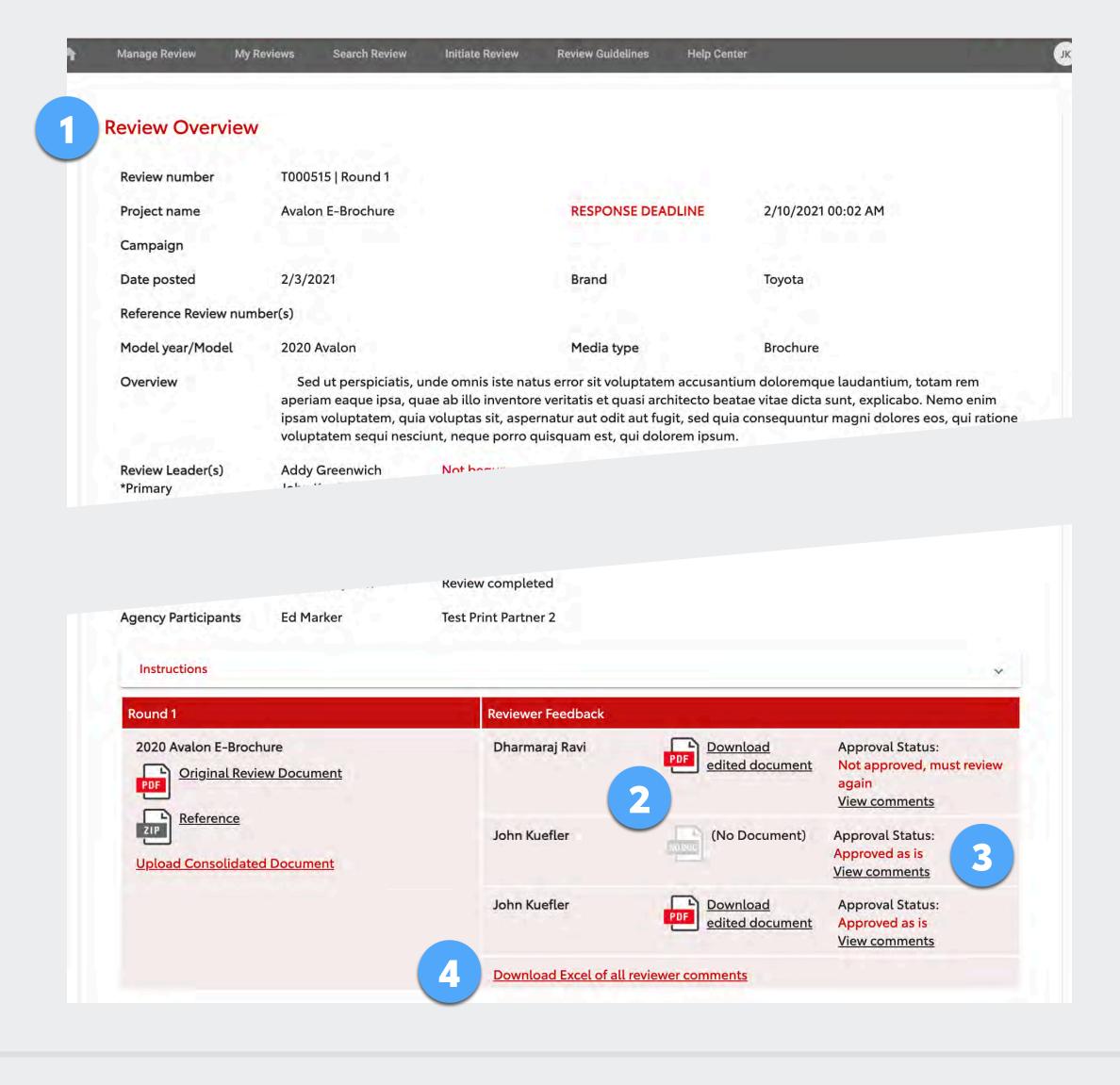
For a <u>published</u> (open) review, in addition to closing the round, you can also add/remove Reviewers and change the deadline.



For <u>closed</u> reviews, you can start a new round (see page 17), reopen a current round (you'll need to publish it again), and archive the review (to remove it from your active lists — see page 39).



REVIEW LEADER: GATHERING REVIEWERS' FEEDBACK



1 After closing the review (see previous page), you'll go to the Overview page.

You can locate this page any time with the *My Reviews* or *Manage Review* tabs, or via Search.

The bottom of the Overview page shows completed Reviewers' approval status, comments (if any) and annotated documents (if any).

You can:

- 2 Download each Reviewer's annotated document (No Document indicates that Reviewer did not upload an annotated doc, but they may still have comments).
- Click View comments to see each individual Reviewer's comments in a popup.
- Download a spreadsheet of all Reviewers comments.

Scroll down to see previous rounds, if any.

REVIEW LEADER: SENDING FEEDBACK TO AGENCY

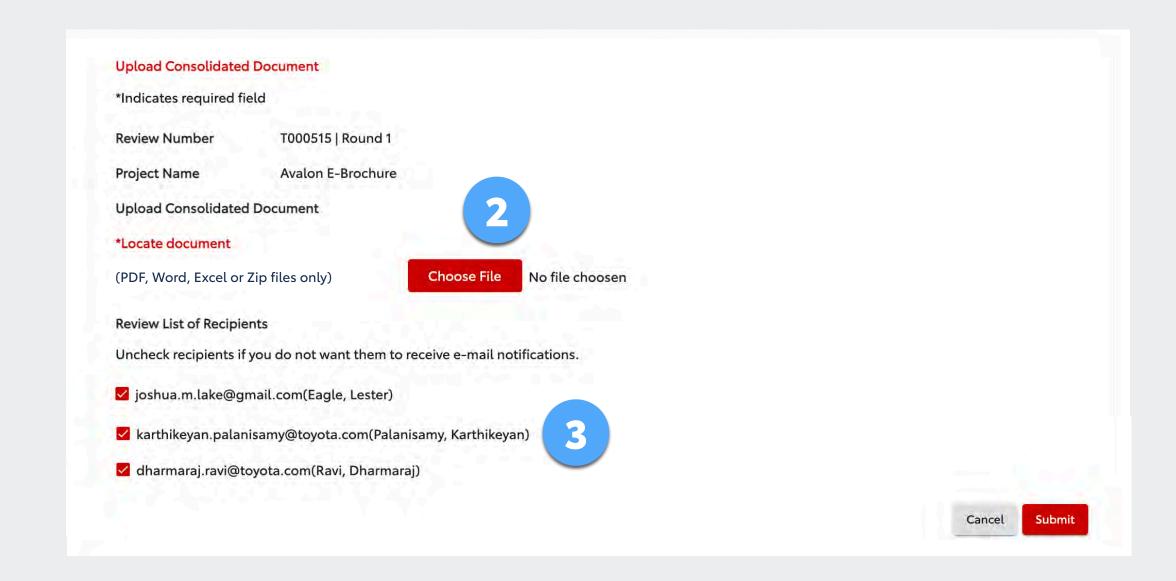
Legal feedback is intended for Toyota employees only. Corporate employees must consolidate the feedback and send it to their agency partners — attorneys' comments should not be sent verbatim directly to agencies.

Therefore, the Review Leader must (1) manually consolidate feedback from Reviewers' comments and/or their annotated documents, and then (2) send it to the agency via the Project Review site (this keeps a record in the system).

After feedback is consolidated, the Review Leader clicks the *Upload Consolidated Document* link on the Overview page.



- Upload the consolidated document. (If you have an annotated document *and* supporting document(s) with comments or instructions, use a zipped folder.)
- Select users to receive an email notification (for example, you may choose only the agency users). The agency will log in and retrieve the consolidated feedback from Project Review.



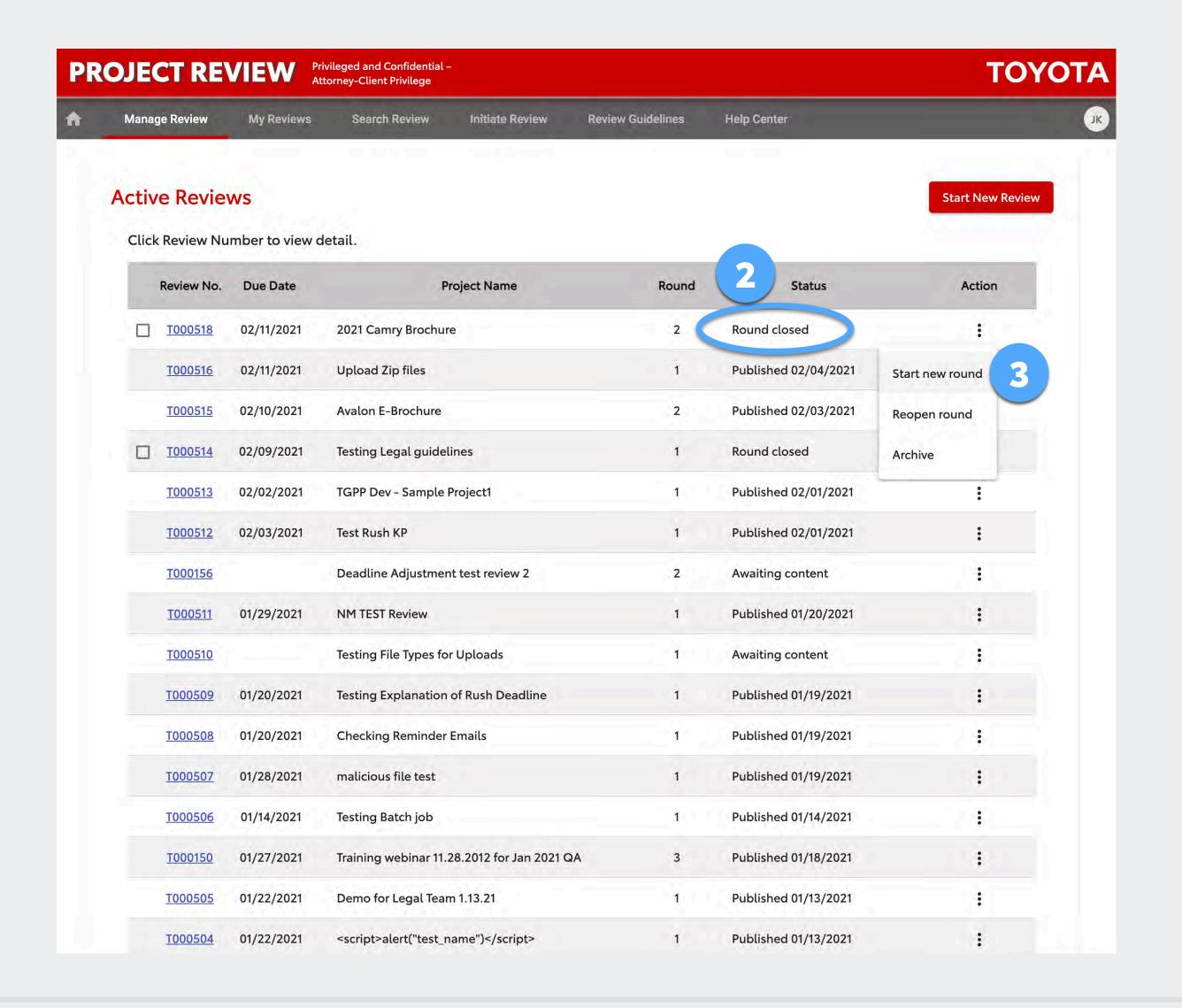
REVIEW LEADER: STARTING A NEW ROUND

To route the next version of a previously reviewed document, rather than starting a new review you should open a new round of the previous review. This keeps all the feedback in one place.

To open a new round:

- 1 Go to the Manage Review page.
- 2 Locate the desired review and make sure the previous round is closed.
- In the Action column, click the menu icon : and select Start new round.

Initiate the new round as described starting on page 9.



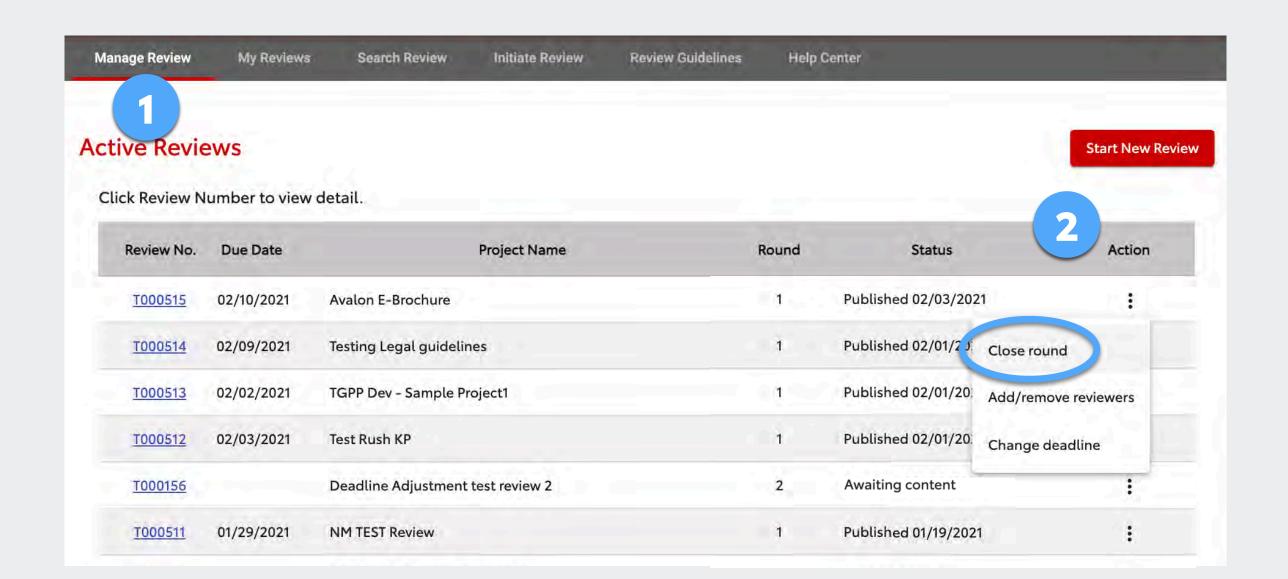
REVIEW LEADER: ARCHIVING REVIEWS

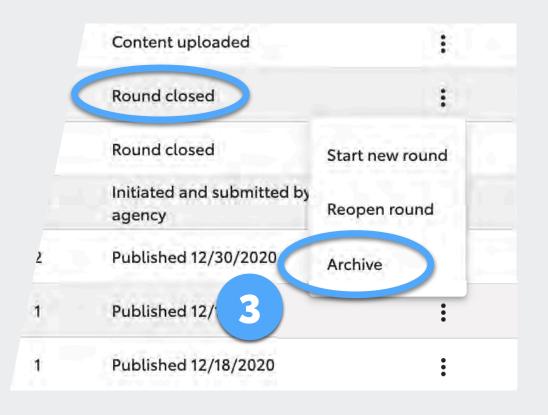
Once all the rounds of a given review are complete and participants have received the review feedback, the Review Leader should archive the review. This is a periodic housekeeping task what will keep users' lists limited to active reviews.

Archived reviews are not deleted, they can be located via search and reactivated at any time (see next page).

To archive a review:

- 1 Click the Manage Review tab.
- Find the review you want to archive and be sure that the *Status* column says *Round closed*. (If it's not closed, in the *Action* column, click the menu icon and select *Close round*.)
- For closed reviews, click the menu icon : and select *Archive*.



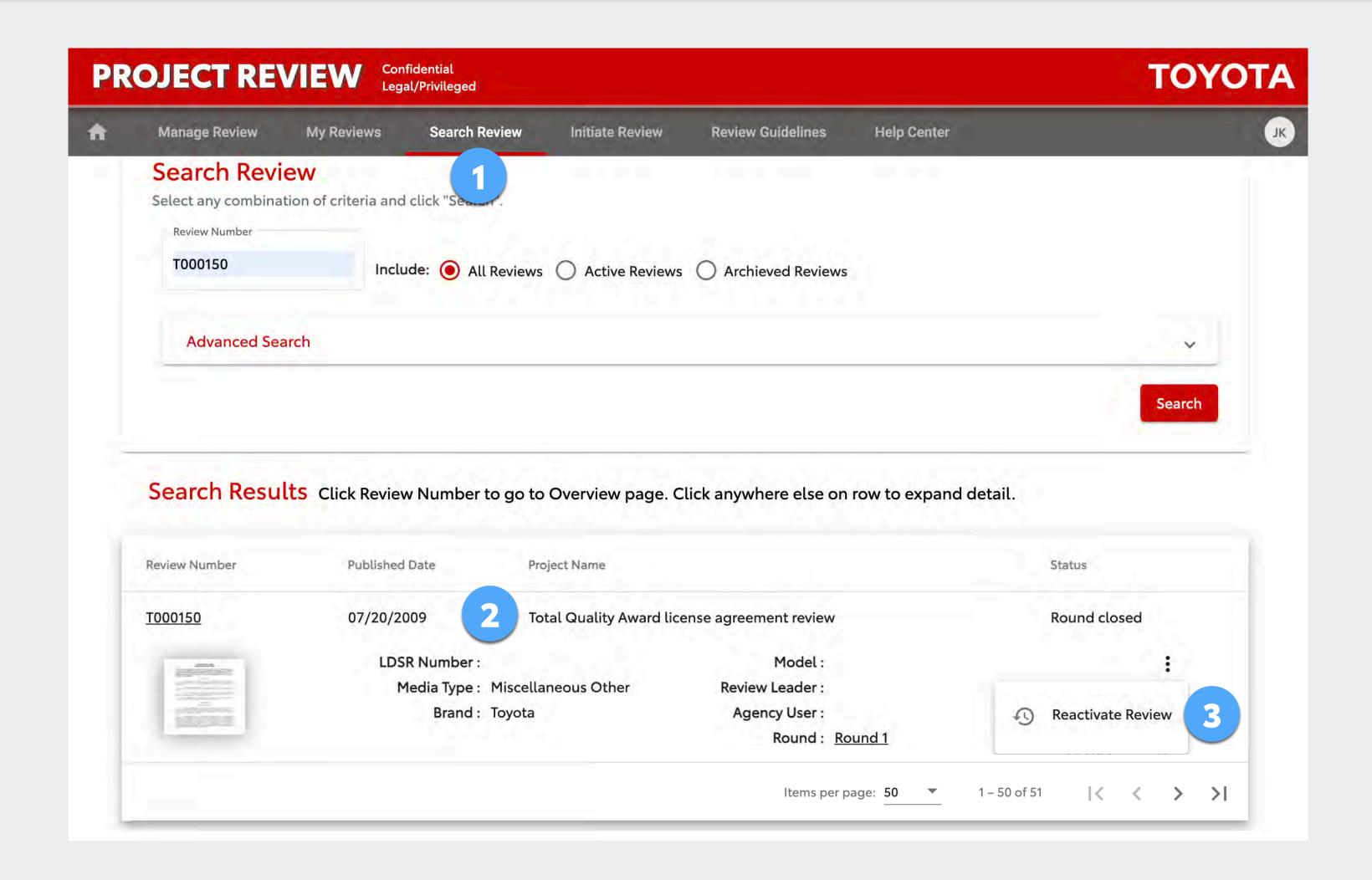


REVIEW LEADER: REACTIVATING ARCHIVED REVIEWS

To reactivate an archived review:

- Locate the review via the search feature (see page 40).
- Expand the search results information by clicking anywhere on the row <u>other</u> than on the Review Number link.
- Click the menu icon: and select Reactivate Review.

Once reactivated, you can locate it on your Manage Review page, start a new round or manage it as with any other active review.



PROJECT REVIEW

USER GUIDE

REVIEWS

- Providing Feedback
- Adding or Removing Legal Reviewers

Note: Typically, a "Reviewer" is a member of the legal team. However, when initiating reviews, Review Leaders may also select Corporate Reviewers if their feedback is needed.



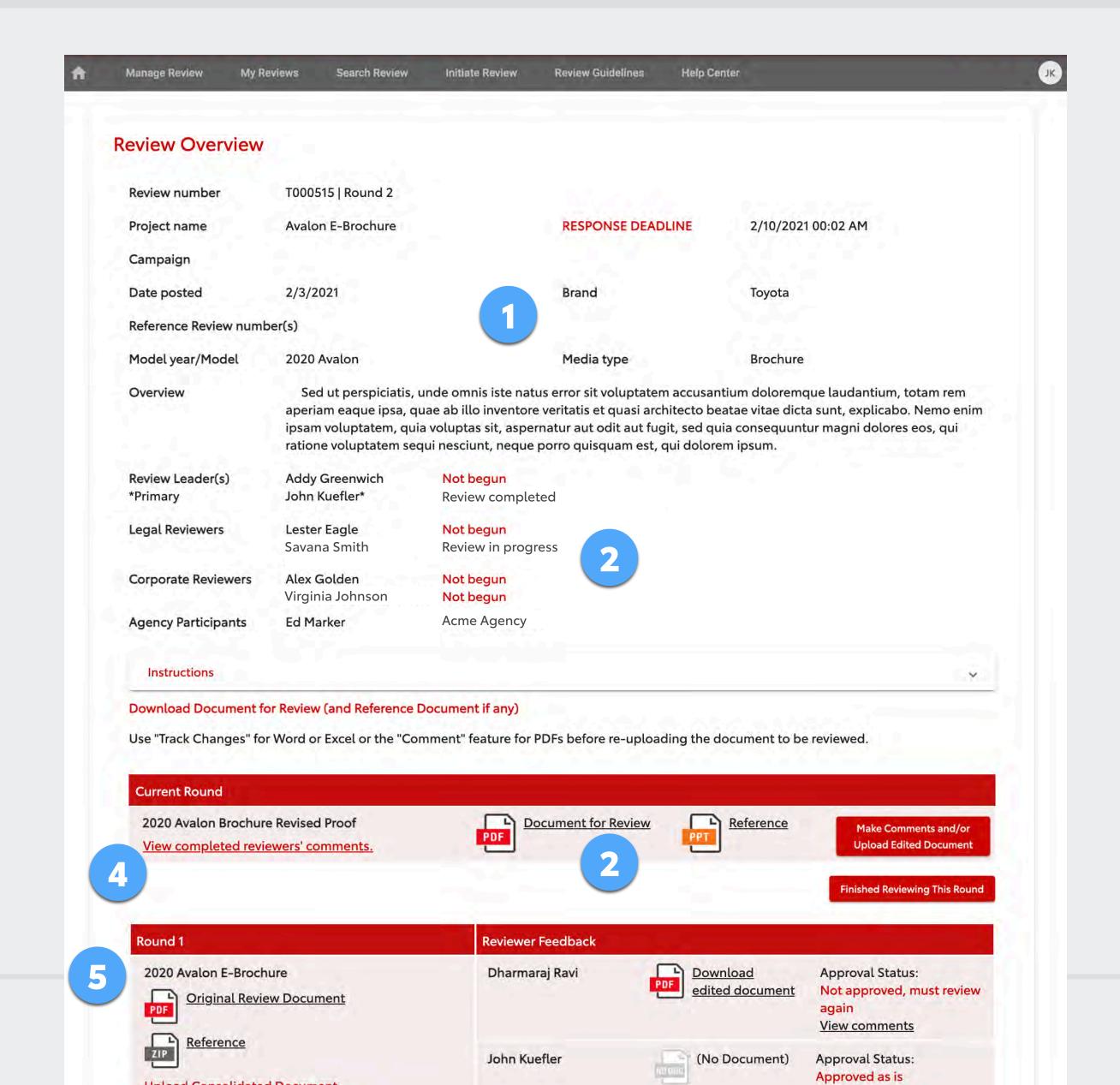


When a Review Leader publishes a review to which you are assigned, you'll receive an email with a link to the review. Click the link, log in, and you will go directly to the Overview page.

You can also find it under My Reviews: Pending Review.

On the Overview page you'll see:

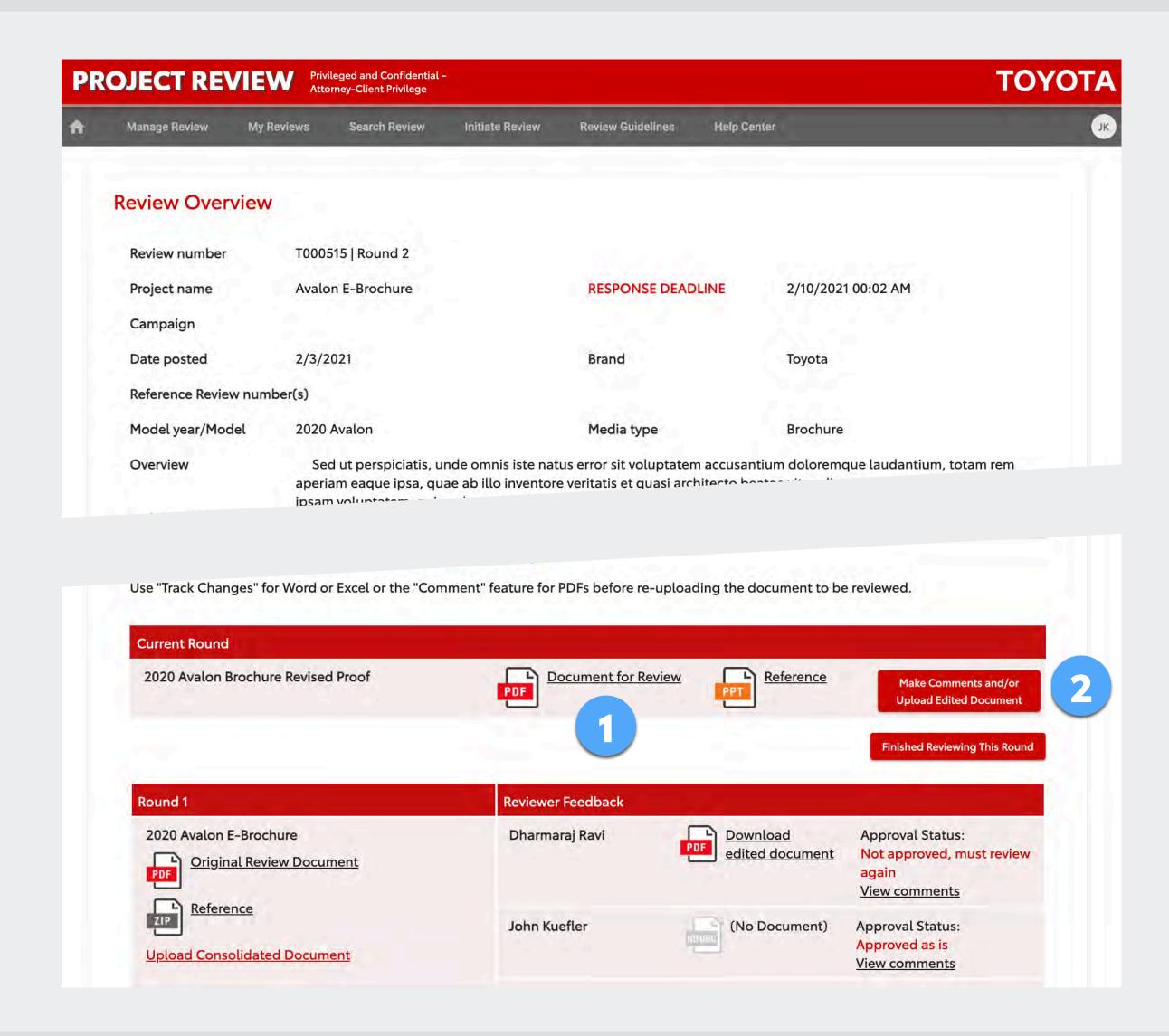
- 1 The deadline and general information
- 2 The people assigned and their progress
- The document to be reviewed (and an optional reference document)
- 4 A link to see <u>completed</u> Reviewers' comments (if any)
- 5 The results from previous rounds (if any)



Providing Feedback, Step 1

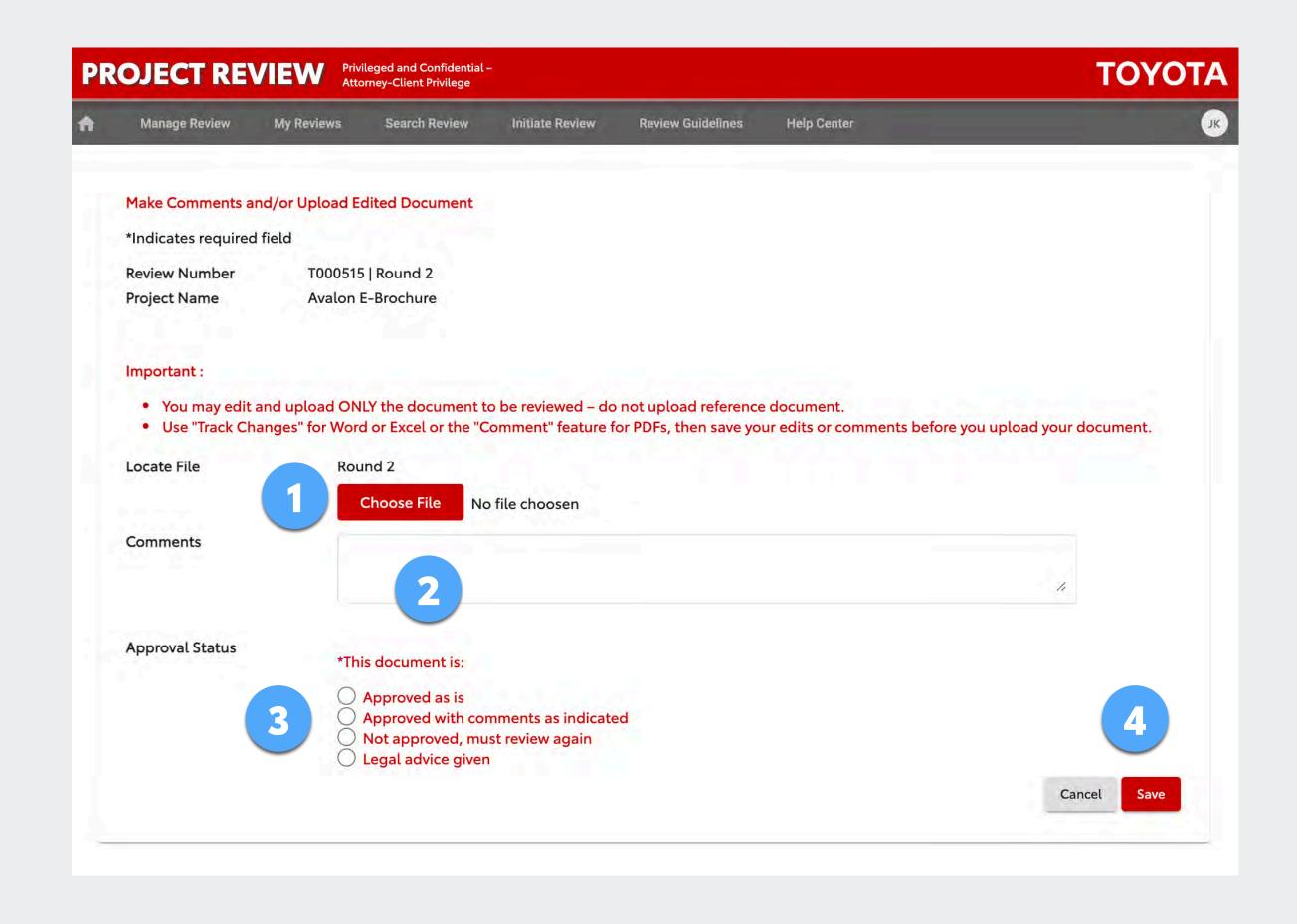
Reviewers have the option to (A) download the document to be reviewed, annotate it, and re-upload it to the system; **and/or** (B) enter feedback in a comment box (see next page).

- 1 Click the Document for Review link to download it (and the Reference file link, if any).
 - Open it in Word, Excel or a PDF reader (such as Acrobat). If you want to annotate it, turn on Track Changes in Word or Excel. Use annotation tools to add markup or comments to PDFs using Acrobat or other PDF readers. Save your changes.
- When you finish reviewing (and optionally annotating) the document, click the *Make Comments* and/or Upload Edited Document button.



Providing Feedback, Step 2

- If you have an annotated document to upload, click the *Choose File* button and locate it on your computer.
- 2 And/or, enter feedback in the Comments box.
- 3 Select an approval option:
 - Approved as is
 - Approved with comments as indicated
 - O Not approved, must review again
 - O Legal advice given
- 4 Click Save.

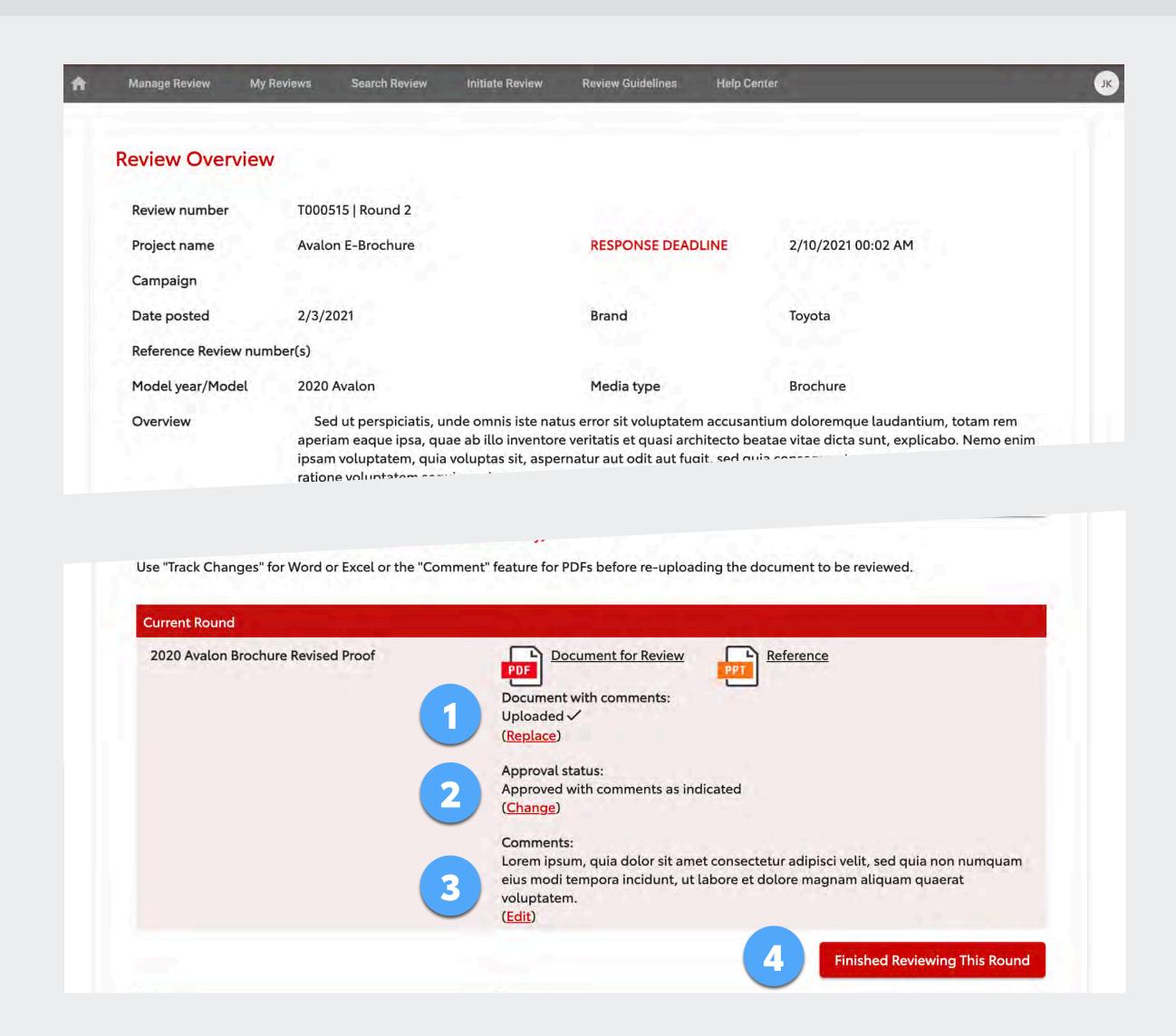


Providing Feedback, Step 3

You'll be returned to the Overview page and you'll see your uploaded document (if any), your comments (if any) and the approval status you marked.

- You can replace your uploaded document using the Replace button.
- You can change the approval status with the Change link.
- 3 You can edit your comments with the *Edit* link.
- When you have <u>completed</u> reviewing the material and providing feedback, click the *Finished Reviewing This Round* button to submit your feedback.

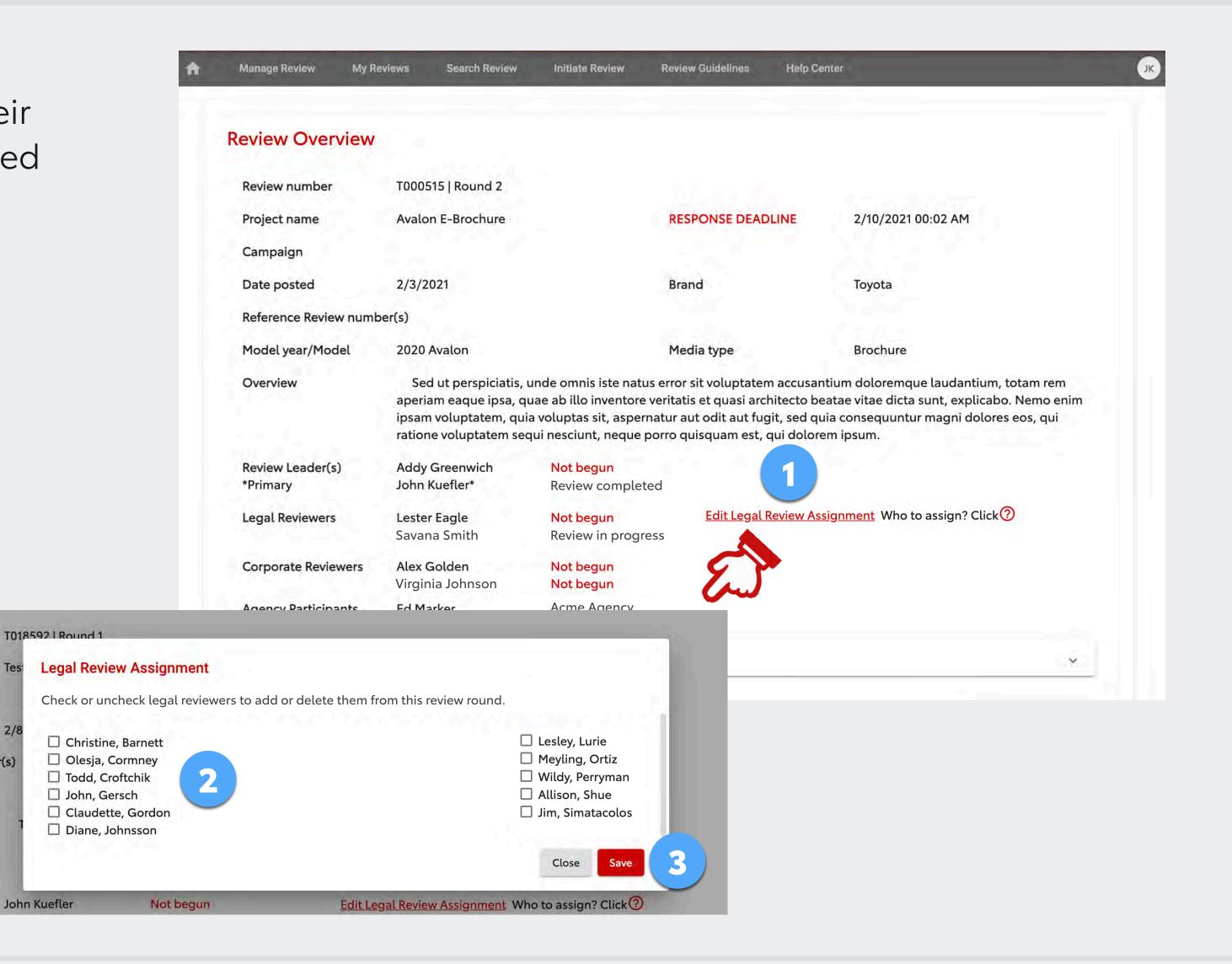
You will see a popup asking you to confirm that you have completed reviewing the material. Once you complete it, you may no longer edit your feedback on this round.



REVIEWER: ADDING OR REMOVING LEGAL REVIEWERS

Legal Reviewers have a feature that is unique to their user role. They can add or remove attorneys assigned to a review.

- 1 Click Edit Legal Review Assignment.
- In the popup window, check or uncheck legal reviewers to add or delete them from this review round.
- Click save.



PROJECT REVIEW

USER GUIDE

AGENCIES

- **Agency Basics**
- Initiating a Review
- Receiving Feedback
- Starting a New Round





AGENCY BASICS

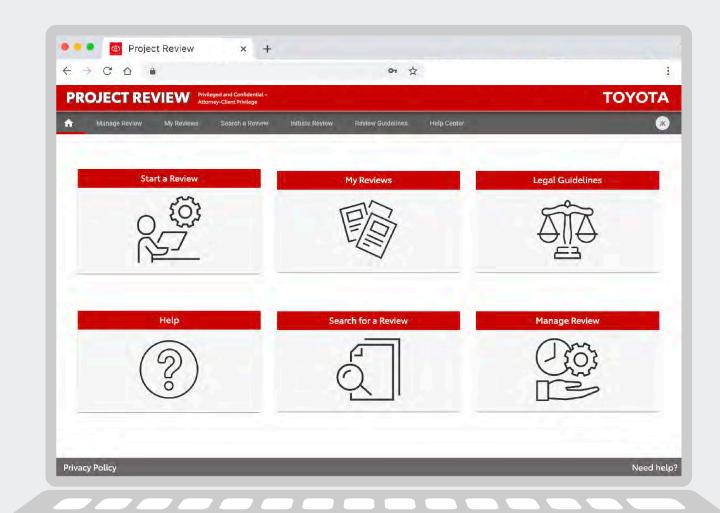
Project Review includes features specifically for agencies.

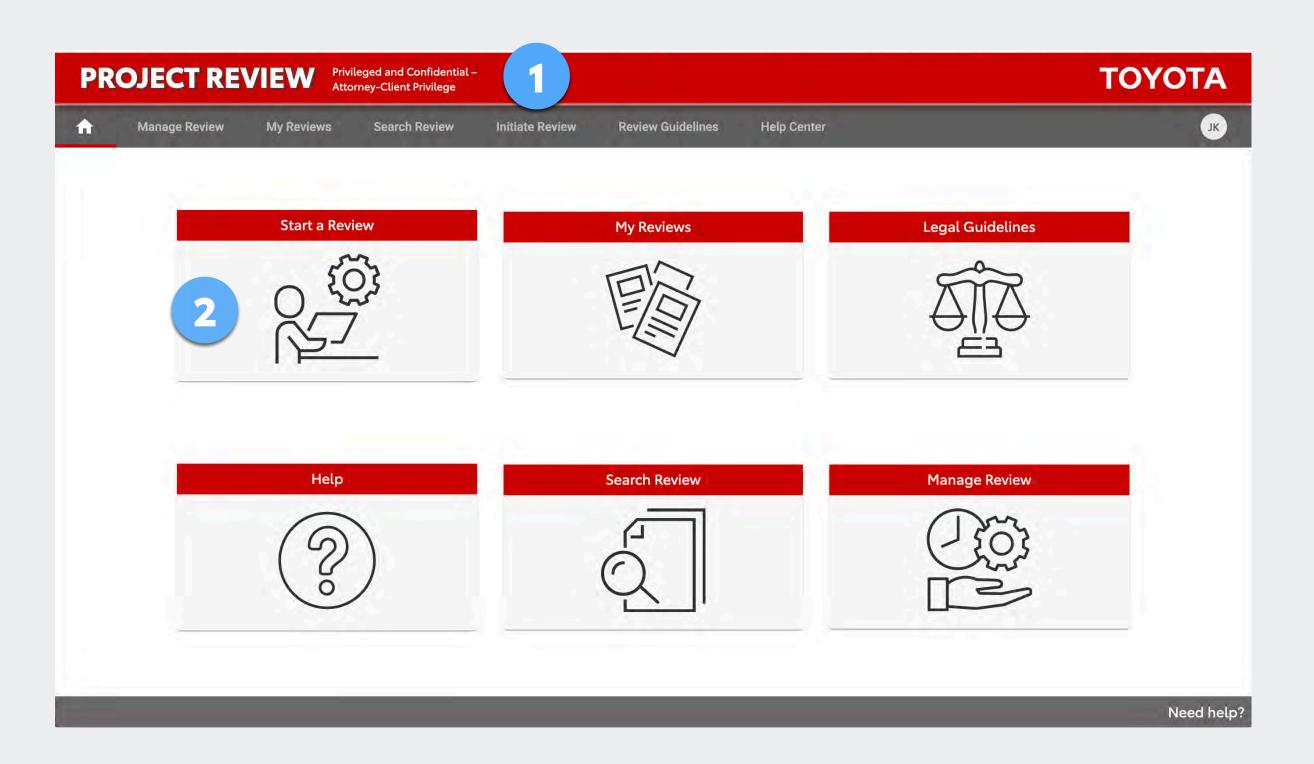
Agency users can:

- Initiate reviews for their Toyota or Lexus clients (page 29)
- Receive feedback through Project Review (page 35)
- Start a new review round (page 36)
- View legal guidelines, disclaimers and photo/video guidelines (page 39)

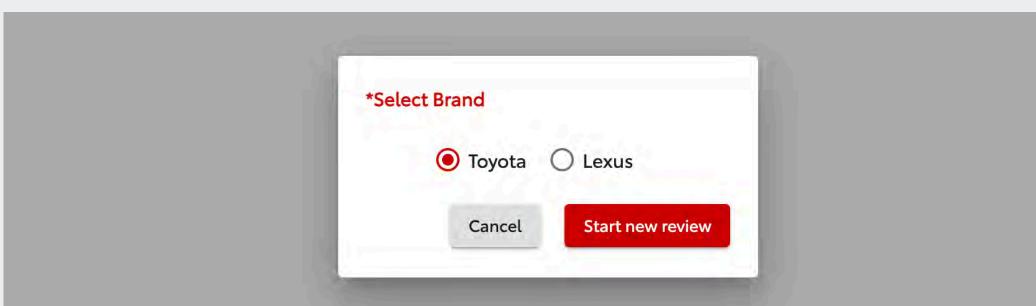
Note: It's important to understand that an agency user <u>must</u> work together with a Toyota or Lexus corporate Review Leader (typically your client). Only a Review Leader can (A) publish the materials for legal review, (B) close the review when the deadline passes, and (C) gather reviewers' feedback and send it to the agency.

Due to Toyota legal policy, agencies cannot receive feedback directly from the Project Review system without corporate employee involvement. Therefore, it's very important for agencies and their clients to understand their respective roles and perform their tasks accordingly.





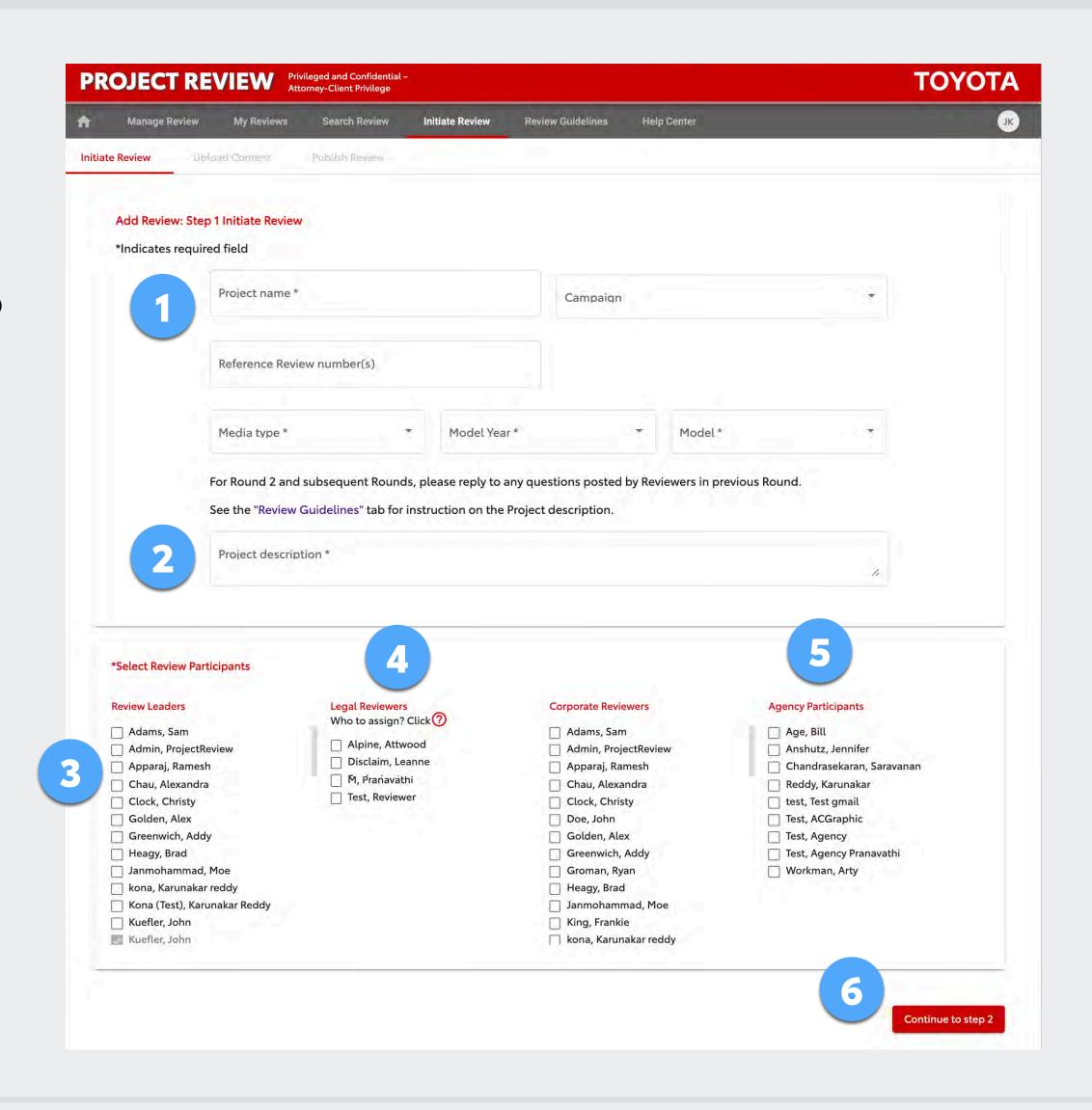
- 1 To initiate a new review, use the *Initiate Review* tab.
- Or, use the Start a Review icon.



Your profile is assigned to the Toyota brand, the Lexus brand, or both. If you are assigned to both you will choose which brand to use for the review. If you need access to a brand to which you are not assigned, submit your request to Support by using the Need help? link in the footer.

Step 1 – Provide Information and Select Reviewers

- 1 Enter the required information.
- Give a detailed description of what you are submitting, how it will appear to a consumer and what you need the attorneys to review (highlighting new or changed copy can be very helpful). Attorneys need the full context to give proper legal advice. See the *Review Guidelines* tab for more instructions.
- You will automatically be selected as an Agency Participant. Select at least two Review Leaders who can manage the review (publish it and gather reviewers' feedback to send to the agency).
- Select Legal Reviewers (click ? for help selecting the correct attorneys) and/or Corporate Reviewers (if any*).
- Select Agency participants. (Your name should already be selected. Add others if desired.)
- 6 Click Continue to Step 2.



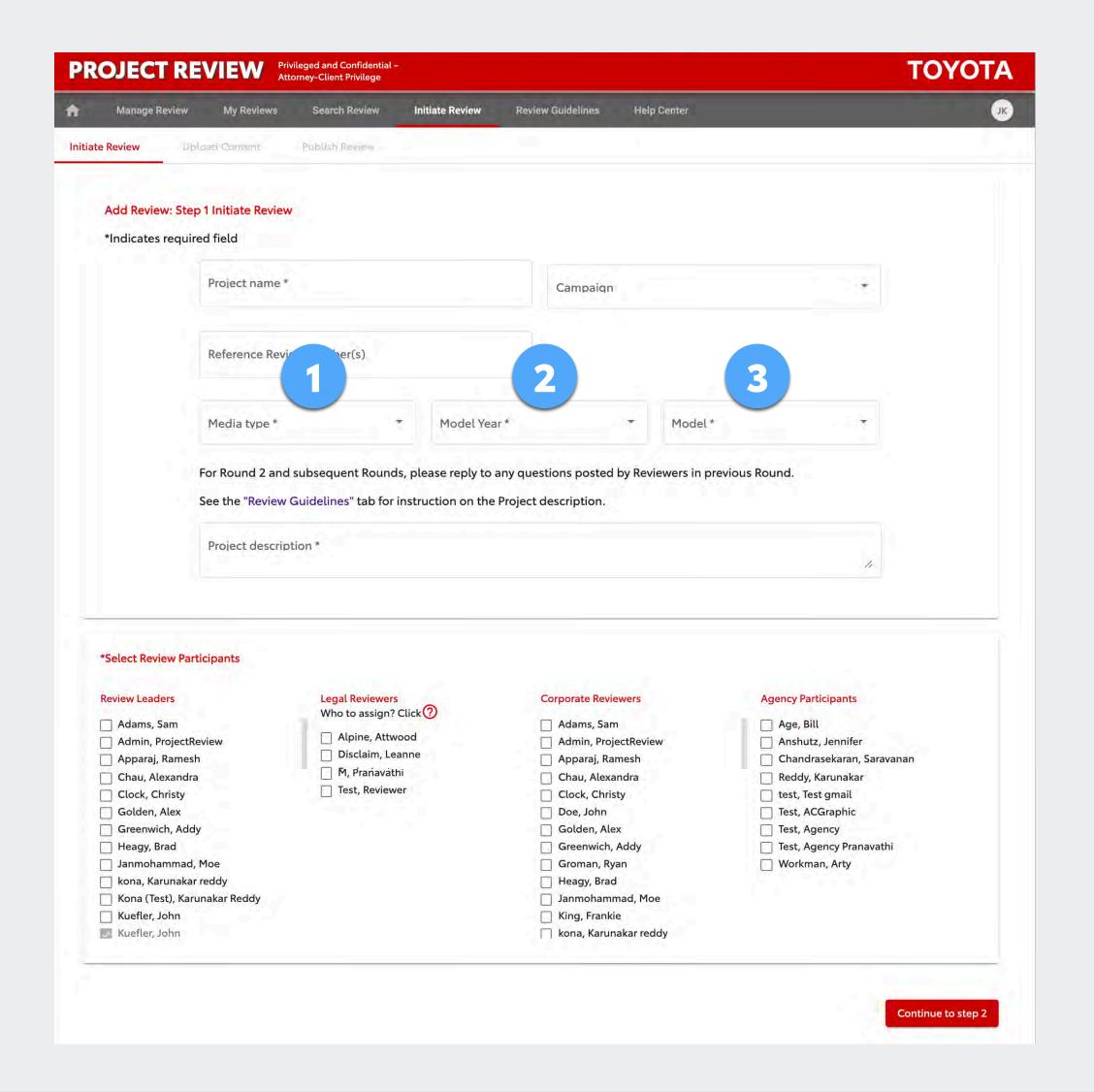
Step 1 – Media Type, Model Year, Model

If you require a:

- 1 Media Type
- 2 Model Year
- 3 Model

And it is not available on the current menus, please contact support using the *Need help*? link at the bottom of the site or email the support team at projectreview.support@toyota.com.

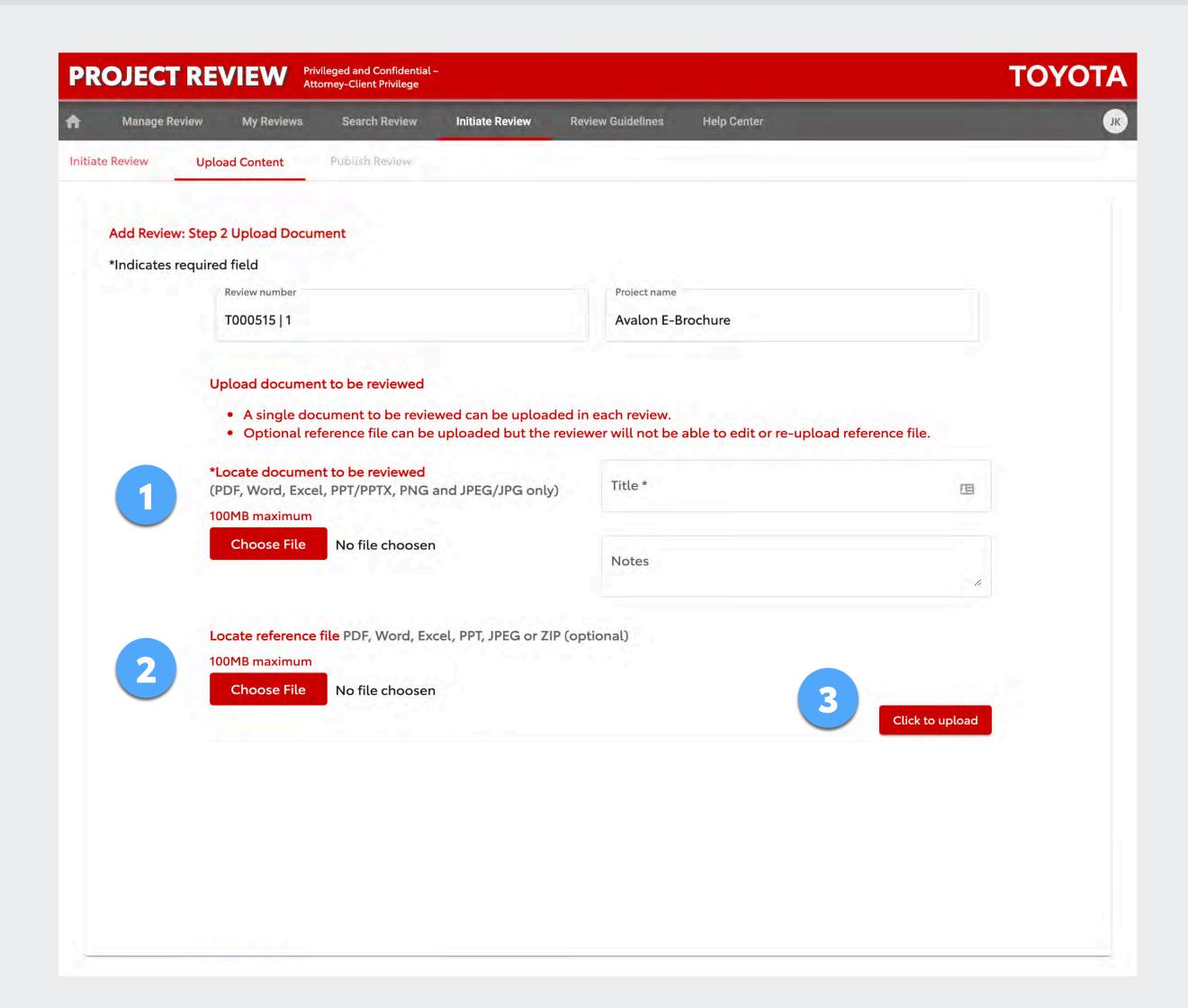
Provide the details for what you need and support will add it to the menu(s).



Step 2 – Upload Content

- Upload the document to be reviewed (PDF, Word, Excel, PPT/PPTX, PNG and JPEG/JPG only), give it a title and add optional notes.
- Attach a reference document if desired (this is not the document to be reviewed). If you have multiple reference documents you can zip a folder containing them all.
- Click to upload. You will see a confirmation, then continue as described on page 34.

NOTE: A Toyota or Lexus corporate Review Leader has the option to initiate a review and invite an agency user to upload the document to be reviewed. In that case, the designated agency user will receive an email directing them to a page like this to upload the file.

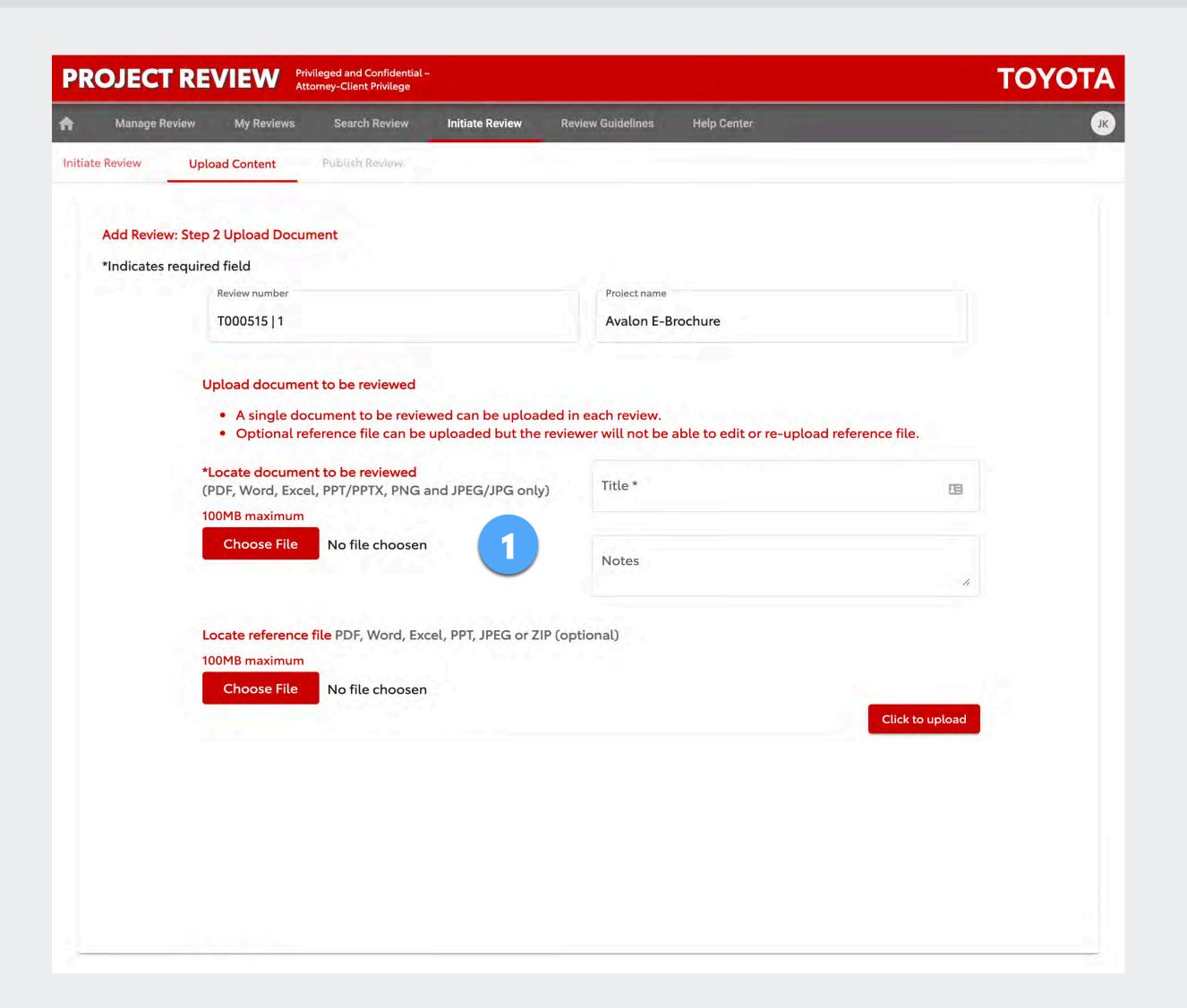


Step 2 – Upload Content: Video and Other File Formats

Only PDF, Word, Excel, PowerPoint, PNG and JPEG files can be uploaded as documents for review.

Videos (or any other content that's not a PDF, Word, Excel, PPT, PNG and JPEG file), must be hosted somewhere accessible with a link. Be sure the link won't expire so the video or other content is available indefinitely.

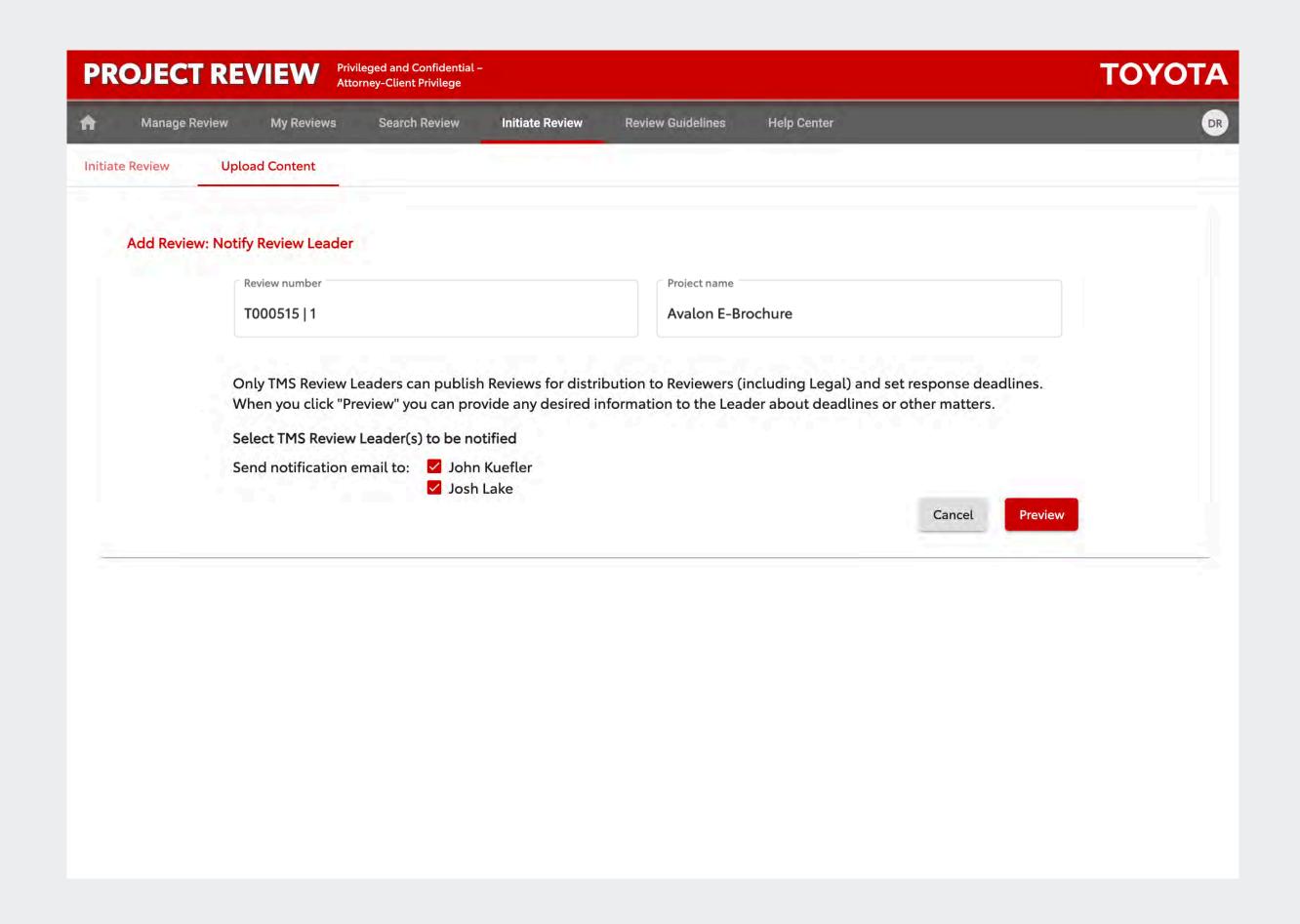
In Project Review, place a link to the video in a Word document and upload it on the Step 2 page. If a password is required for access, include that in the Word document along with the link and any other relevant notes.



Step 3 – Notify Review Leader

Select the Review Leader(s) you want to notify. Click Preview to see the system email they will receive, which you can edit, if desired. It is important that the Review Leader is available and understands their role, because the review <u>will not be sent to Legal</u> until the Review Leader checks it over and publishes it.

NOTE: When the Review Leader publishes it, assigned agency users will receive an email informing them that the Review is published.

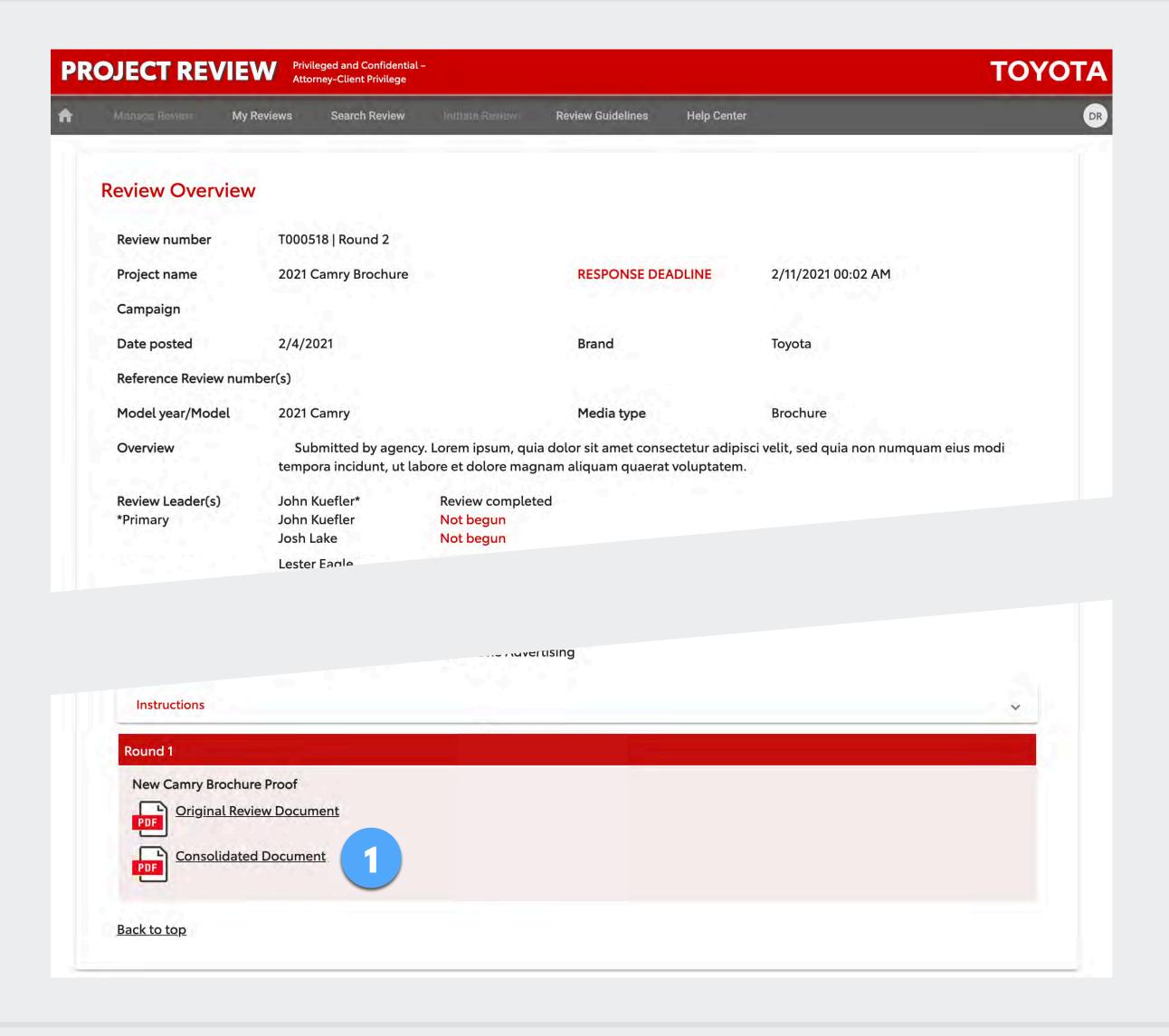


AGENCY: RECEIVING FEEDBACK ON A REVIEW

The Review Leader must <u>close</u> the Review before all Reviewer's feedback can be gathered and sent to the agency. If you are waiting for feedback, please check with your client and ask if the Review Leader has closed the review and uploaded a consolidated document (with all Reviewers' feedback).

When the Review Leader uploads the consolidated document, the agency participant(s) will receive an email with a link to the overview page shown here.

1 Download the consolidated document with this link.



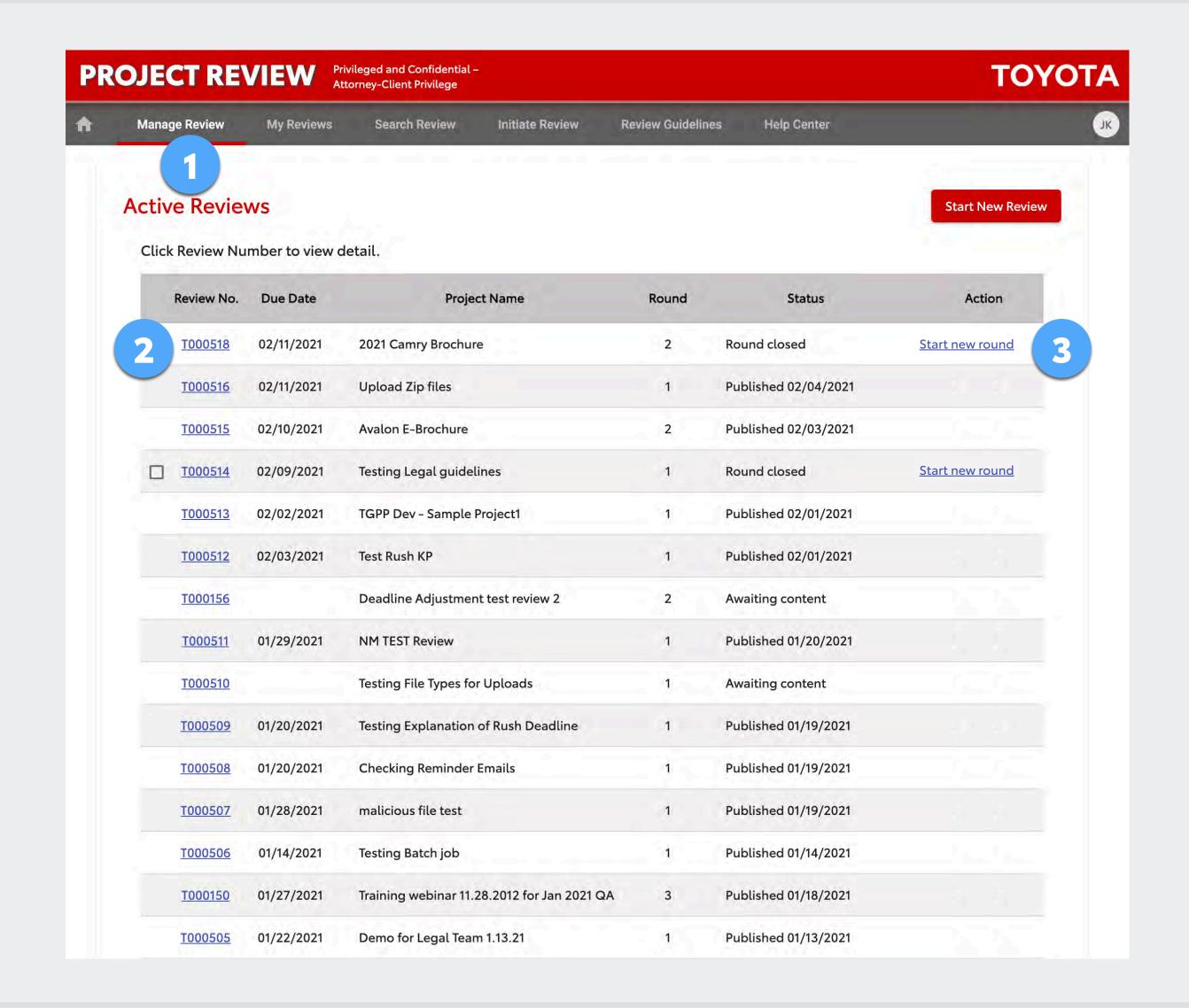
AGENCY: STARTING A NEW ROUND

To route the next version of a previously reviewed document, rather than starting a new review you should open a new round of the previous review. This keeps all the feedback in one place.

To open a new round:

- 1 Go to the Manage Review page.
- 2 Locate the closed review for which you want to open a new round.
- 3 In the Action column, click Start new round.

Initiate the new round as described on page 30.



PROJECT REVIEW

USER GUIDE

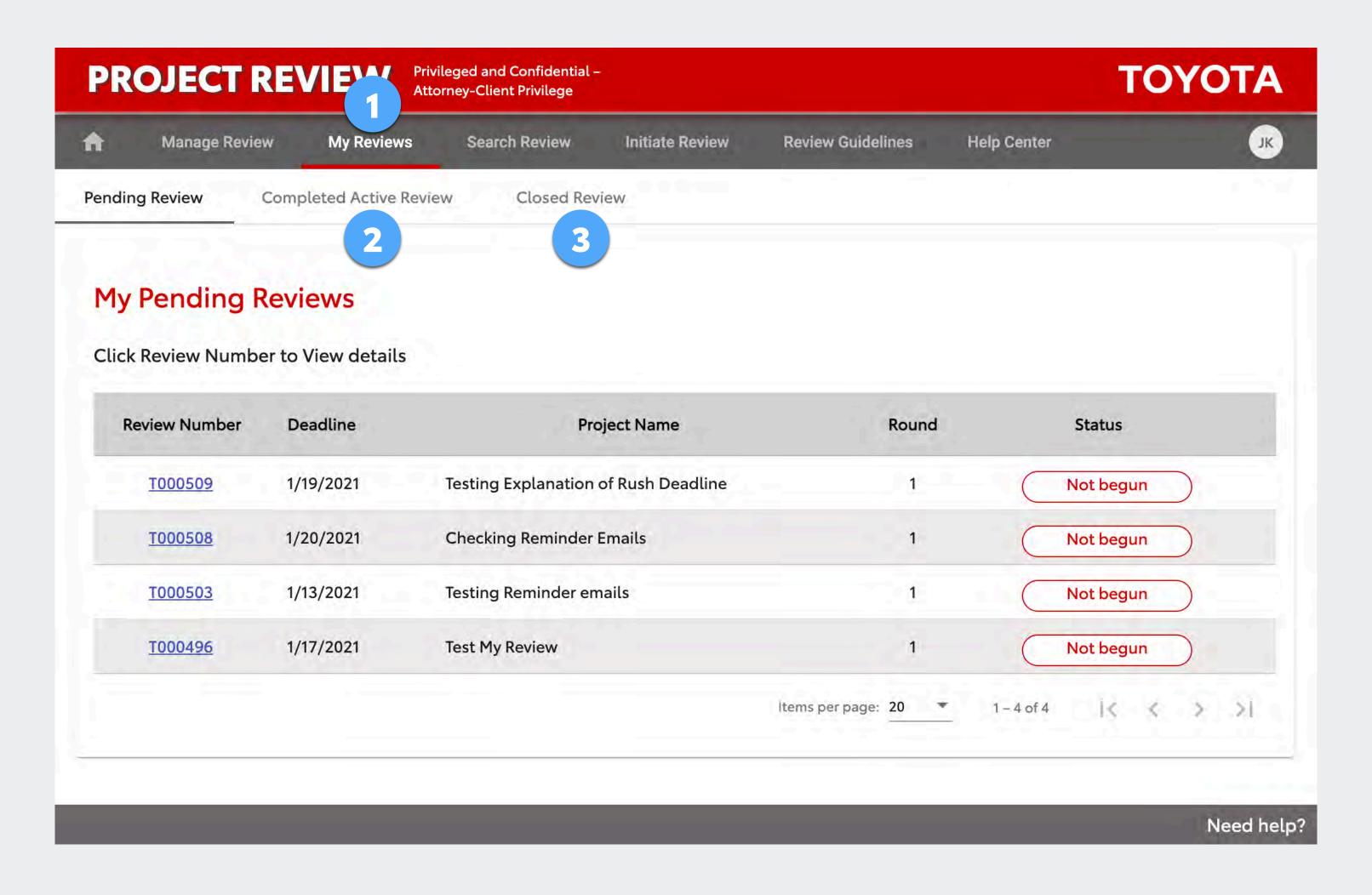
HELPFULFEATURES

- Navigation
- Legal Guidelines
- 40 Search
- Your Profile & Help Requests





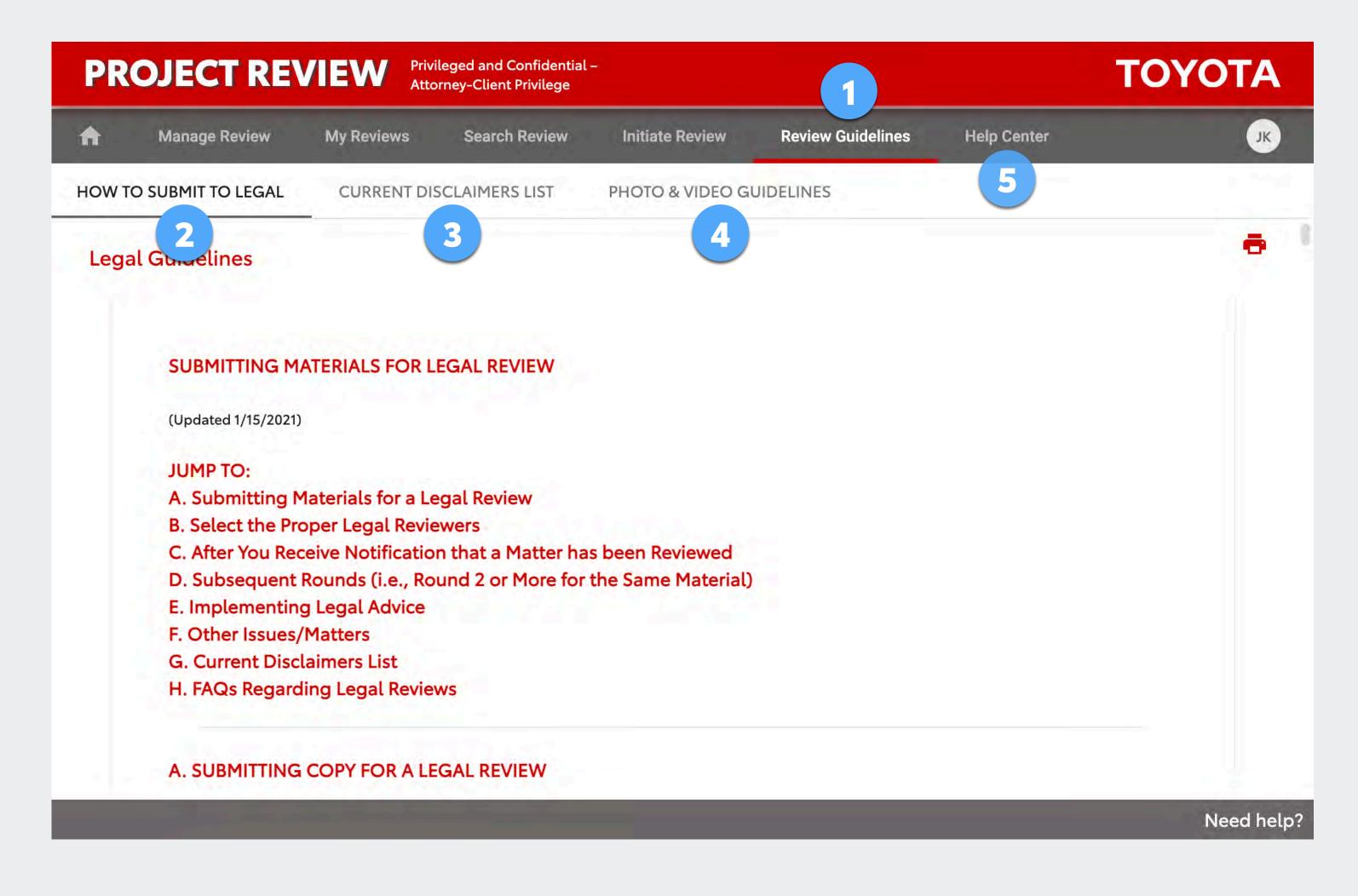
HELPFUL FEATURES: NAVIGATION



The *My Reviews* section includes tabs for these sub-pages:

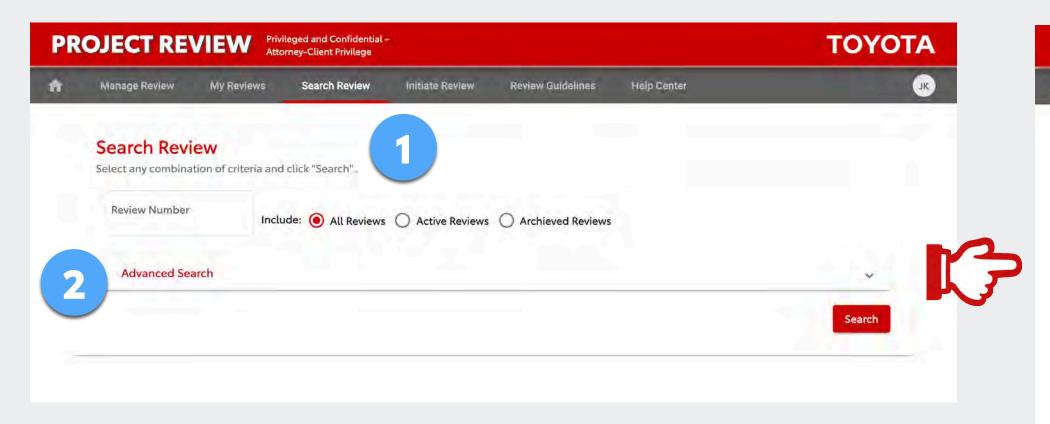
- 1 Pending Reviews
- 2 Completed Active Reviews
- 3 Closed Reviews

HELPFUL FEATURES: LEGAL GUIDELINES



- The Review Guidelines section includes tabs for these sub-pages:
 - Legal guidelines/instructions for submitting materials for review
 - Current legal disclaimers list (updated regularly)
 - Legal guidelines for shooting photos and videos that appear in Toyota/Lexus materials
- The Help Center includes a User Guide and FAQs

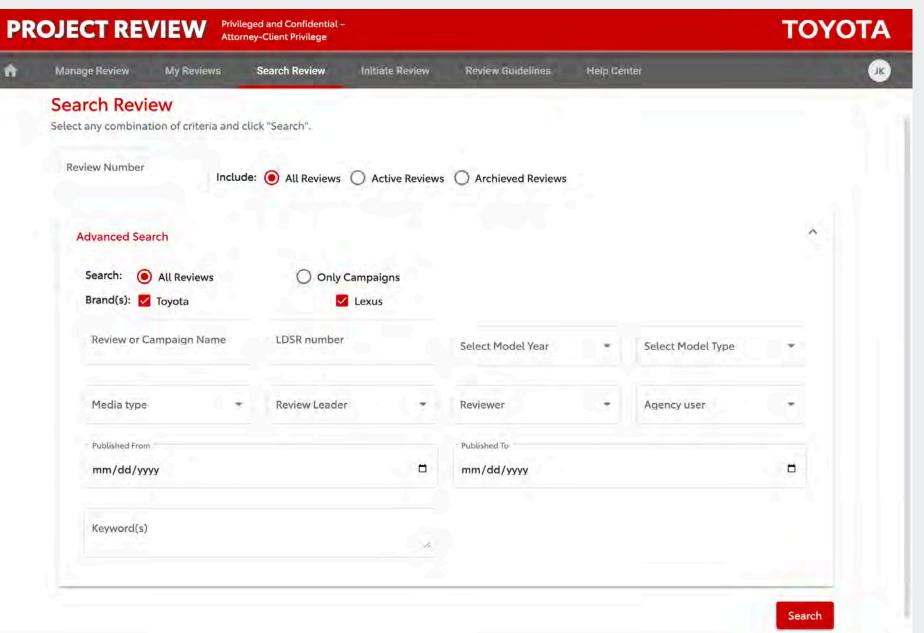
HELPFUL FEATURES: SEARCH

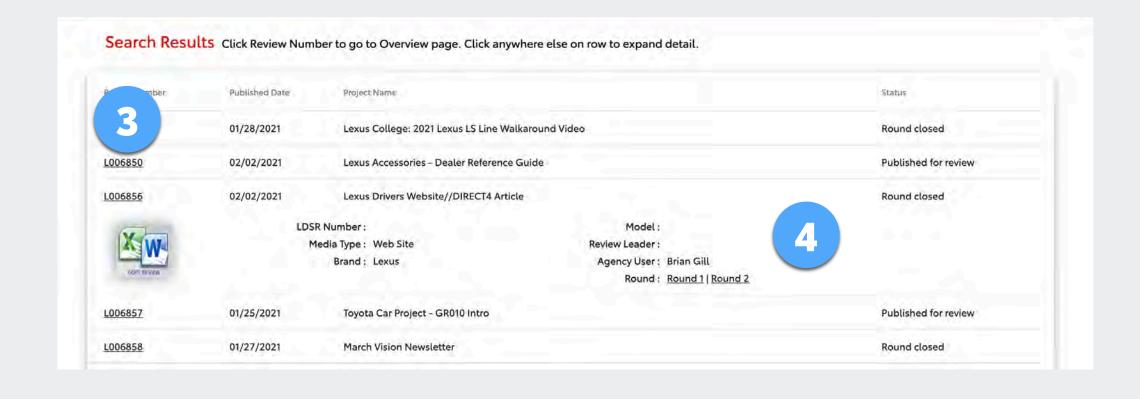


- On the Search page you can do a simple search by review number.
- Or, you can click Advanced Search to expand options to use additional search criteria.

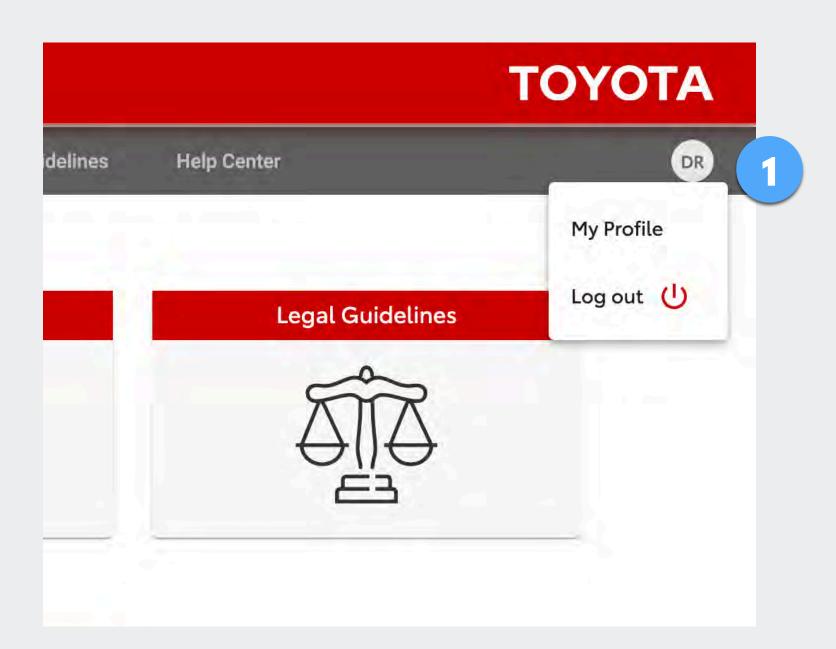
On the Search Results page:

- 3 Click a Review Number to go to the Overview page.
- Click anywhere else on a row to expand detail.



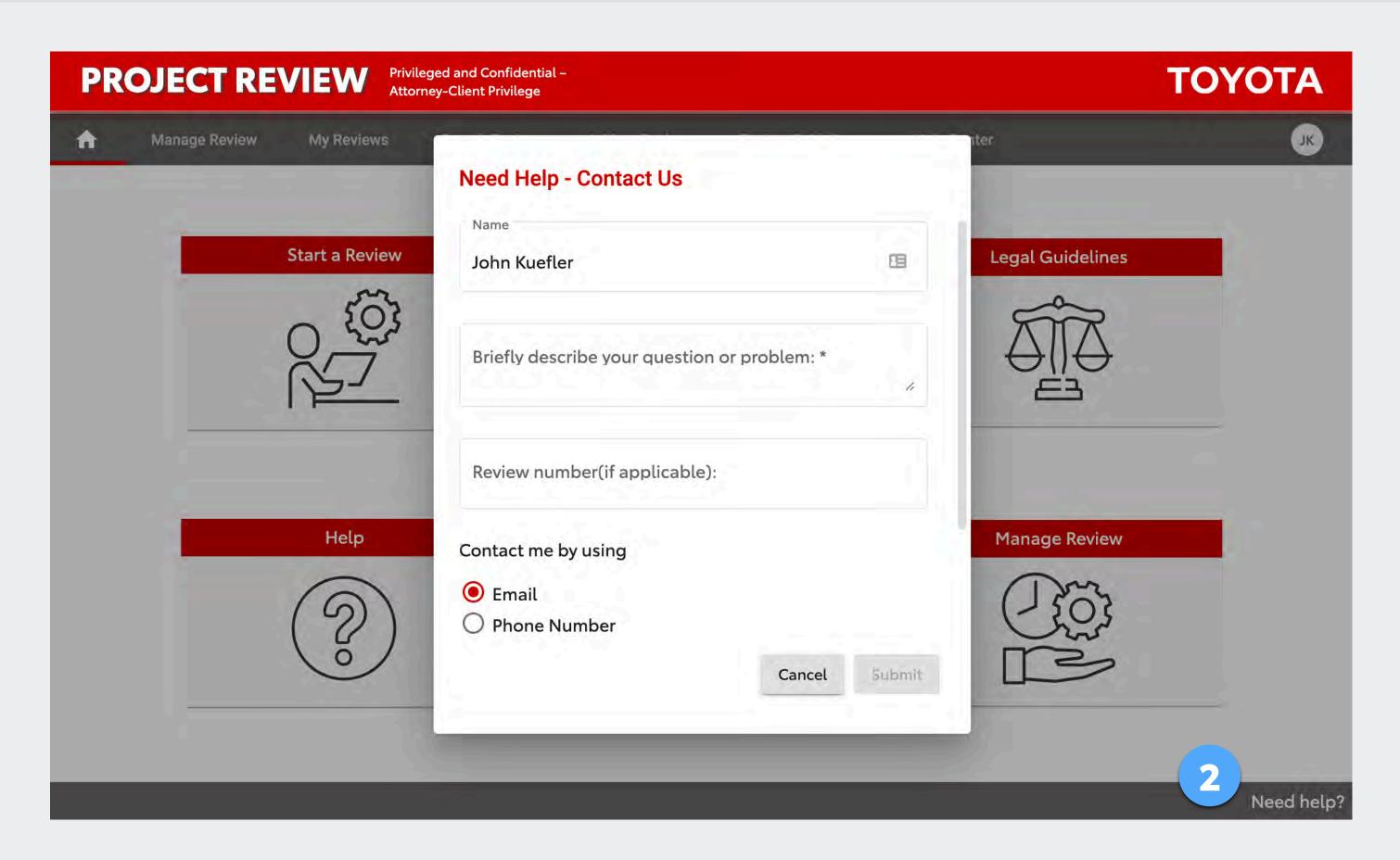


HELPFUL FEATURES: YOUR PROFILE & HELP REQUESTS



1 Click the circle with your initials to access your profile page or to log out.

(Note that some fields on your profile can only be edited by a system admin.)





Use the Need help? link to submit a help request or email the support team at <u>projectreview.support@toyota.com</u>.