Review proofs

The proofing viewer makes collaborative asset approval faster.

Your team spent hours creating the deliverable for a project — a sale ad, a process chart for a new customer, or guidelines that accompany the latest product to leave the factory floor.

Now it’s time for the key stakeholders to take a look and give their feedback.

Workfront’s review and approval functionality is the perfect solution. The proofing viewer allows everyone access to a single, cloud-based proof of the asset.

Review processes are more efficient with the proofing viewer because multiple people can comment on the proof at the same time. This means review cycles take less time and you get assets out the door faster.

Reviewing and approving assets with Workfront’s proofing viewer is simple:

- Access your proof from an email or Workfront.
- Make comments on the proof, and use markup to indicate where changes should be made.
- See comments made by other reviewers, and respond to their questions.
- Compare versions of the asset to make sure the requested changes have been made.
- If everything looks good, you can approve the asset. Or reject it and request additional changes.
Inside this guide

Web proofing viewer vs. desktop proofing viewer ................. 3
Receive a proof to review ..................................................... 4
Proof viewer overview ....................................................... 5
  Add comments and markup ............................................... 6
  Markup and annotation tools .......................................... 7
  View comments ............................................................. 8
  Search, sort, filter comments .......................................... 9
  Reply to comments ....................................................... 10
  Manage comments ....................................................... 11
Compare proof versions ..................................................... 12
Make a decision on a proof ............................................. 13
Additional tools in the viewer .......................................... 14
  Proofing terminology .................................................... 15
  Proof roles ................................................................. 16
  Email alerts ............................................................... 17
  Monitor progress and status ......................................... 18
Web proofing viewer vs. desktop proofing viewer

The web-based proofing viewer and the desktop application proofing viewer work exactly the same. The window that displays the proof looks identical, and the tools available within each are the same.

The desktop proofing viewer, which runs on your local computer as an application, is used to review interactive content, such as a website or a streaming video. The web proofing viewer allows you to view only static and video proofs.

The appropriate proofing viewer will open, depending on the type of proof you’re accessing. However, you can configure your proofing viewer to always use the desktop version, if desired.

For more information, review these articles on the Workfront support website:

FAQ — Desktop Proofing Viewer

Understanding the Differences Between the Web Proofing Viewer and the Desktop Proofing Viewer

Understanding the Desktop Proofing Viewer

Installing the Desktop Proofing Viewer for Your Organization

Updating the Desktop Proofing Viewer

Configuring Proofing Viewer Settings

Reviewing and Managing Interactive Proofs
Receive a proof to review

Use the email notification to open the new proof into the viewer. Or find the file and open it from Workfront.

PROOF EMAIL NOTIFICATION

Click the blue Go to proof button in the email to open the proof into the proofing viewer. The proof opens into the web-based proofing viewer or the desktop proofing viewer, depending on what type of proof it is. See Understanding Differences Between the Web Proofing Viewer and the Desktop Proofing Viewer for details.

PROOF APPROVALS IN HOME

1. Manage proofs that need your approval in Workfront Home. Proofs where you are listed as only a reviewer will not display in Home. Use the email to access those assignments.

2. Select Approvals from the Filter dropdown.

3. Select the asset to approve from the Work List. The information panel on the right side of the window shows the details about the asset.

4. Click the Go to Proof button in the top-right corner of the window to launch the proofing viewer.
Proof viewer overview

[A] Access previous versions of the proof.

[B] Hide/display the thumbnail view panel.

[C] Choose between single-page display, continuous scroll, or magazine layout.

[D] Navigate through pages of the proof.

[E] Measure an area of the proof.

[F] Compare versions of the proof.

[G] Add a comment and/or markup.

[H] Markup tools are available after clicking Add comment.

[I] If you’re a proof approver, make your decision on the proof (approve, reject, etc.).

[J] Collapse comments column.

[K] Sort comments.

[L] Filter comments.

[M] Search the text of the proof (available for specific file types).

[N] Make a comment, reply to a comment, attach a file to a comment, etc.

[O] Move the proof around within the window.

[P] Change zoom percentage of the proof.

[Q] Options for fitting proof within the proof viewer window.
Add comments and markup

The proof viewer allows you to do markup directly on the proof, indicating where changes need to be made. Comments allow you to offer instructions, such as rewriting text or swapping images.

1. Click Add comment at the top of the proof viewer window.
2. A comment box opens on the right side of the viewer.
3. Enter your text for the comment, whether it be instructions on how to change a layout or text to swap out.
4. Select a markup tool from the toolbar.
5. Draw on the proof, indicating the area to which your comment pertains.
6. Click Post on the comment box. The comment and associated markup are instantly saved, which means they’re now available for other reviewers on the proof.

EDIT COMMENTS
You can edit or delete a comment until either someone has replied to it or the proof is locked. Click the 3-dot menu on the comment box to select Edit or Delete.

MARKUP FLAG
A flag 🟢 indicates there’s markup on the proof. Click the flag to view the markup and open the associated comment.

COMMENT CONNECTOR
A line connects the markup on the proof and the associated comment.
### Markup and annotation tools

Use markup to point to an section on the proof to help clarify a comment or question.

![Annotation tools](image)

[A] Text — Highlight text on the proof. Available only on certain types of static proofs.

- The annotation tools appear after you’ve highlighted text: highlight, delete, replace, insert, bold, italics, underline.


[C] Line — Add a straight line on the proof.

[D] Arrow — Draw an arrow to point to a selected area of the proof. The point of the arrow draws at the end of the line.

[E] Highlight — Highlights the selected area of the proof.

[F] Rectangle — Draw a box around part of the proof.

[G] Polyline — Draw a connected sequence of line segments. Connect the endpoints to draw a shape, or leave the shape open. You can add or delete points. Helpful when trying to highlight odd shapes on a proof.

[H] For each of the tools, you can change the color of the highlight or drawing. For the drawing tools (line, arrow, box, etc.), you also can select the opacity of the line and the thickness of the line. Select the tool, then select the color options before you start drawing.
View comments

Have a real-time conversation with other reviewers through comments in the proof viewer.

VIEW ALL COMMENTS

[A] Click an individual comment to expand it.

[B] Use the gray arrows to navigate up and down through the comment list.

[C] The initials at the top corner of the viewer show who is looking at the proof at the same time as you.

VIEW A SPECIFIC COMMENT

[D] Click the flag on the proof to expand the associated comment and show the markup. The flag number and comment number match.

COMMENTS COLUMN

If the comments column isn’t visible, expand it by clicking the View comments link on the right side of the window. This also tells you how many new comments there are, plus the total number of comments.

Collapse the column again by clicking the double arrow.
Search, sort, filter comments

Comments are listed in the order they’re saved. Easily find comments relevant to what you need while reviewing the proof.

SEARCH COMMENTS

Click the search icon (magnifying glass) at the top of the comments column to open the search field. Enter the text you want to search or the number of the comment to display. Click the X at the end of the search field when you’re done searching.

SORT COMMENTS

Click the dropdown to sort by Latest for new comments at the top. Group comments by author, alphabetically or in reverse alphabetical order.

Page number down and up is available for static proof to display comments in relation to the page number. A timestamp option displays when looking at video proofs.

FILTER COMMENTS

1. Click the filter icon.

2. If you’re looking for comments by a specific person, click into the Authors field and select their name from the list that displays.

3. If you want to display comments that have a specific action applied, check the boxes next to the desired action names.

4. Click the Apply button when you’ve set all of the desired filters.
Reply to comments

Keep the conversation about the asset all in one place. Attach related documents to comments for others to download.

**REPLY TO A COMMENT**

1. Click a comment in the comment list to expand it. Or click on a markup pin on the proof to expand the associated comment.

2. Type your reply next to your initials at the bottom of the comment.

3. Click the Reply button to save your response.

Each response is timestamped when it’s saved so you can tell when the response was posted.

Learn more about managing proof comments in the Workfront article titled *Creating and Managing Proof Comments.*

**ATTACH A FILE**

1. Expand the comment, so you can see the response area.

2. Click the attachment icon (the paperclip).

3. Navigate to and select the desired file from your hard drive or other source. Click Open.

4. Click Reply on the comment to complete the upload. The file attaches to the comment.

To download an attached file, click the link in the comment and then select the Download button.
Manage comments

Use the resolve feature to keep track of which comments have been addressed. Use an action to indicate something needs to be done regarding a comment.

RESOLVE A COMMENT

Once a comment has been addressed, click the resolve icon (the check mark). This places a green check mark at the top of the comment card, allowing others to see the comment has been taken care of. And it records in the comment replies who resolved the comment and when.

To reopen the comment, click the green check mark. This, too, is recorded in the comment replies.

APPLY AN ACTION

Actions are an optional feature on comments and are set up for your organization’s workflow.

Click the action icon (the flag) at the bottom of the comment card. Or click the 3-dot “more” menu in the upper-right corner of the comment.

Select the desired action. The action and who applied it are recorded in the replies of the comment.

Remove the action by clicking the icon again and selecting Remove action.
Compare proof versions

Compare different versions of the same proof to make sure revisions were made before approving the final asset.

1. Open the desired proof into the proofing viewer.

2. Click the compare icon.

3. The two most recent versions of the proof open side-by-side in the viewer window.

When you're done comparing the versions, click the X in the upper-right corner of the proofing viewer window.

Learn more about comparing proofs on Workfront’s support website with the article Comparing Proofs in the Proofing Viewer.

**Comparison overview**

[A] Name of the proof version that is displayed in that half of the window. Click the name and select another version to change what you’re seeing.

[B] Indicates the proof is locked and no further comments or markups can be made.

[C] Expand the comments column.

[D] Expand the thumbnails column.


[F] Overlay comparison of the proof versions.

[G] Auto compare is a pixel-level highlight of the differences between versions. Available in the side-by-side and overlay modes.
Make a decision on a proof

A decision might indicate a formal sign off on the proof, or just a way to let everyone know you’re done reviewing the file.

1. Click Finish review at the top of the viewer.

2. Pick the desired option and click the Make decision button.

DECISION OPTIONS

Your decision options may vary from the default Workfront options, which are:
- Approved — You approve the proof. It is ready for publication, release to customers, etc.
- Approved with Changes — You have requested changes to the proof but don’t need to see another version before it’s released for publication.
- Changes Required — You have requested changes to the proof and want to see a new version once the changes are made.
- Not Relevant — You think a decision made by you on this proof is not relevant.

If you don’t see the Finish review option at the top of the page, this means the proof manager doesn’t need you to make a decision on the proof.

Learn more on Workfront’s support website in the article Making Decisions on a Proof.
**Additional tools in the viewer**

Click the menu icon at the top-left corner of the viewer to access additional tools you might need when working with proofs.

[A] Click to expand or collapse the menu panel.

[B] Find the file name, proof owner, creation date, and proof status. Click the Proof Activity panel to see information about when the proof was uploaded, when new versions were added, and more. More information is available in the Workfront article Viewing Activity on a Proof in the Proofing Viewer.

[C] The workflow panel shows the overall proof status, as determined by the decisions and actions made on the proof by all reviewers in every stage of review. You can also see the actions taken by each reviewer. Find more details in the Reviewing a Workflow in the Proofing Viewer article.

[D] Copy a shareable link to the proof, grab the proof’s embed code, or add individual users to the proof. You must have certain permissions to be able to add users to the proofing workflow and set their proof role, email alerts, and deadline. The article Sharing a Proof in the Proofing Viewer provides detailed information on who can share a proof.

[E] Click to download a copy of the original file the proof was generated from. This does not download comments or other information associated with the proof. Find more details in Downloading a Proof in the Proofing Viewer on Workfront’s support website.

[F] Print a summary of the proof comments in a spreadsheet or PDF. You can also print thumbnails of the proof, if desired. Get more information in the Printing a Proof in the Proofing Viewer article.

[G] Lock the proof so no further comments are markups can be made. This also prevents users from making decisions on the proof.

[H] Establish your personal proofing viewer settings, such as showing the markup pins on the proof. You can also set the desktop proofing viewer to be the default, so every proof you open uses the desktop viewer. Learn about all the options in Configuring Proofing Viewer Settings.
<table>
<thead>
<tr>
<th></th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>At Risk</strong></td>
<td>At Risk proofs are less than 24 hours from the deadline (by default) and still have at least one outstanding decision. Your system administrator can adjust the At Risk time to suit your organization’s process.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Comments allow a reviewer to mark corrections, make suggestions, ask questions, etc., regarding the content of a proof. Comments often are linked to a specific markup on the proof.</td>
</tr>
<tr>
<td><strong>Deadline</strong></td>
<td>The deadline requires that all comments and decision are made on the proof by a specified date and time.</td>
</tr>
</tbody>
</table>
| **Decision** | A decision is the approval or rejection of a proof by an assigned approver. Proofing has four standard decisions. These can be customized by your system administrator to match your organization’s terminology and processes.  
• Approved — You approve the proof. It is ready for publication, release to customers, etc.  
• Approved with Changes — You have requested changes to the proof but don’t need to see another version before it’s released for publication.  
• Changes Required — You have requested changes to the proof and want to see a new version once the changes are made.  
• Not Relevant — You think a decision made by you on this proof is not relevant. |
| **Email Alert** | Email alerts are sent to reviewers and approvers assigned to the proof when activity happens on the proof. Activity includes comments, replies to comments, decisions made, etc. The options for email alerts are: All Activity, Daily Summary, Replies to My Comments, Hourly Summary, Decisions, Final Decision, and Disabled. Email alerts should not be confused with notification emails, which are sent when a new proof is ready for review, a new version of the proof has been uploaded, or when the proof is late. |
| **Guest** | A guest is someone who can review and approve proofs but does not have a proofing user license in Workfront. There is no limit to the number of guests that you can share proofs with. |
| **Late** | Proofs are late when not all decisions have been made and the assigned deadline has passed. |
| **Markup** | The markup tools in the proof viewer allow you to highlight text or draw lines, boxes, etc., on the proof to clearly illustrate what you are describing in your comments. Markups are often linked to specific comments on the proof. |
| **Proof** | A proof is a digital asset — static file, audio file, video file, URL, etc. — that is available for review in the proof viewer. |
| **Proof Role** | Proof roles define what actions a user can take in relation to that specific proof. There are six proof roles: Read Only, Reviewer, Approver, Reviewer & Approver, Author, and Moderator. Author and Moderator can be assigned only to proof users, not guest reviewers. |
| **Proof User** | A proof user is someone who can review and approve proofs and has a proofing user license in Workfront. A proof license also allows the user to create, route, and manage proofs. |
| **Sharing** | Give people — proofing users or guest reviewers — access to a proof so they can view it, make comments, or make decisions on the proof. |
| **Version** | A revised copy of the proof document. |
| **Workflow** | A workflow is the overall movement of a file through the review and approval process in order to produce a final version of the file. Within this overall workflow, there may be multiple proofing stages. |
Proof roles

Roles establish what the assigned person can do with the proof.

Some people just need to look over the proof, so they’re a Reviewer. Others need to leave comments and give a final approval, so they’re a Review & Approver.

<table>
<thead>
<tr>
<th></th>
<th>READ ONLY</th>
<th>REVIEWER</th>
<th>APPROVER</th>
<th>REVIEWER &amp; APPROVER</th>
<th>AUTHOR*</th>
<th>MODERATOR*</th>
</tr>
</thead>
<tbody>
<tr>
<td>View a proof</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add markups</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add comments</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Edit your own comments (if there are no replies)</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Make a decision</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Edit or delete comments (made by others)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Edit the proof</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add proof recipients</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

* Author and moderator proof roles can be assigned only to proof users, not guest reviewers.
Email alerts

The alert settings determine when the assignee receives email notifications about activity on a proof.

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Activity</strong></td>
</tr>
<tr>
<td><strong>Replies to My Comments</strong></td>
</tr>
<tr>
<td><strong>Decisions</strong></td>
</tr>
<tr>
<td><strong>Final Decision</strong></td>
</tr>
<tr>
<td><strong>Hourly Summary</strong></td>
</tr>
<tr>
<td><strong>Daily Summary</strong></td>
</tr>
<tr>
<td><strong>Disabled</strong></td>
</tr>
</tbody>
</table>
Monitor progress and status

Track the review progress of your proof using the progress bar, instead of digging through your inbox for updates.

PROGRESS BAR [A] [B]

The progress bar represents the overall progress of the file through the review and approval workflow.

Each box on the bar stands for a step in the proofing process:

- **S** — Sent (proof has been sent to reviewers)
- **O** — Opened (proof details page has been opened or proof itself has been opened in the proof viewer)
- **C** — Comments made (someone has made comments on the proof)
- **D** — Decision made (someone has made a decision on the proof)

If the **C** or **D** is missing from the progress bar, that step is not applicable for the proof.

The colors used in the progress bar relate to the deadline on the proof:

- **White** — Step not complete
- **Orange** — Step not complete and deadline is in less than 24 hours (or your system's At Risk setting)
- **Red** — Step not complete and deadline has passed
- **Green** — Step is complete

**NOTE**

The overall progress of the proof is driven by the “worst case” participant. For example, four people have been assigned to approve the proof. If three of them have reviewed and made a decision but the fourth person hasn’t, the overall progress indicates a decision has not been made because the proof is waiting for that last person to make their decision.
The proof status shows the decision of each approver or the overall status based on all approver’s decisions.

**PROOF STATUS [C]**

The standard status options are: Pending, Approved, Approved with Changes, Changes Required, and Not Relevant.

The status of the proof is driven by the “worst case” participant. For example, there are three approvers on the proof. Two have the status of Approved and one has the status of Changes Required. The Changes Required status overrides the other decisions and serves as the overall status.

See [Viewing the Progress and Status of a Proof in Workfront](#) for more details.

**REVIEWER/APPROVER STATUS [D]**

You can see the progress and status of each individual reviewer/approver assigned to the proof in the details window.

The progress bar indicates what step of the workflow they’re at, with the status indicating if they’ve made a decision.

The comment bubble displays the total number of comments made by the reviewer and the number of replies.