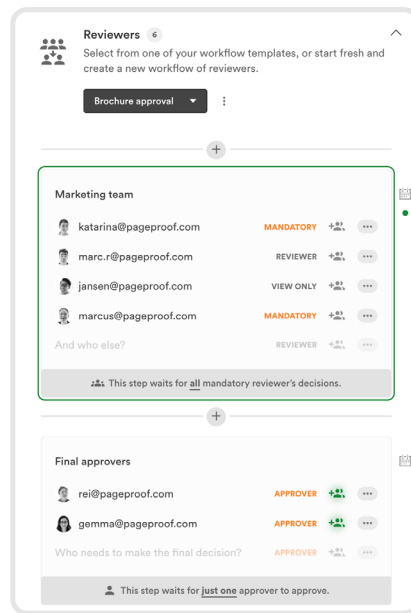
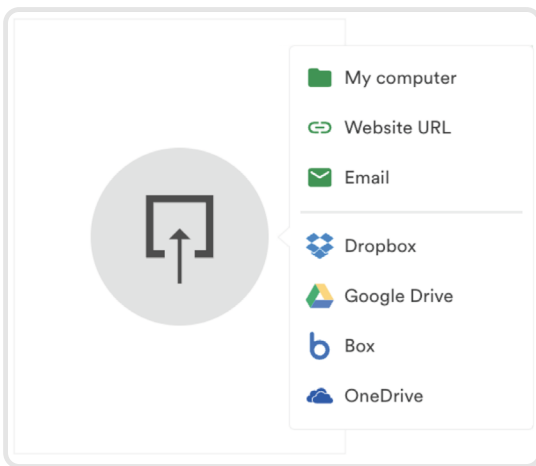




PageProof guide for owners



CREATING A PROOF

Drag and drop your file onto the dashboard file dropper, or click  for options. In the proof setup screen:

- Check the name, tags (useful for searching and grouping), set a deadline (with reminders if needed), and add a message to your reviewers that will go out in the email invitation.
- If you want to allow reviewers to download your original file, set download to on .
- If you want to allow this proof to be accessed by anyone using the proof URL, turn on the share link .
- Select a workflow for your proof: either create a new workflow from scratch, or choose a workflow template.
- Choose a checklist template for your proof.

Tip: Use a proof template to prefill information in the proof setup screen.

WHAT IS A WORKFLOW

A proof can involve one or many reviewers. Workflows contain these reviewers along with their permissions.

View only reviewer

A view only reviewer can see the proof. They can not add comments or replies, or leave a decision on the proof.

Reviewer & mandatory reviewer

A reviewer is asked to view and comment on the proof but can not send a to-do list. It is the responsibility of the gatekeeper or approver to review all the comments and send the to-do list. The only difference between a reviewer and a mandatory reviewer is that the workflow step will wait for all mandatory reviewers to finish reviewing the proof before the proof moves on to the next workflow step.

Gatekeeper

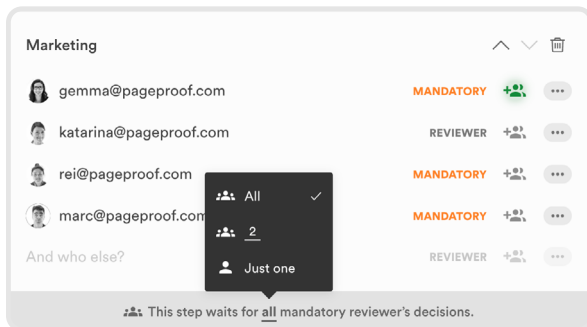
A gatekeeper is asked to view and comment on a proof, but also decides whether the proof is approved to move on in the workflow and continues on to the approver, or is returned with a to-do list. The gatekeeper reviews comments (including those of other reviewers) and sends the to-do list.



Approver

The difference between a gatekeeper and approver is that the approver has the ability to give final approval on the proof. They decide whether the proof is approved as is, or is returned with a to-do list. The approver is last in the workflow. You can have multiple approvers, or no approvers at all.

Tip: You can set how many decisions are required from mandatory and gatekeeper reviewers in the workflow step before the proof moves on.



INVITE INTO THE WORKFLOW

Displayed next to each reviewer in the workflow in the inviter icon. If the icon is green the reviewer can invite another reviewer into the workflow, skip, and nudge. Reviewers are added by entering their email address into the workflow in the proof's info pane.

Rest assured, unless the share link has been turned on, only those in the workflow, you, and other proof owners will be able to see and comment on the proof.

CREATING A NEW VERSION

1. Dashboard

Your dashboard manages and auto-archives your proofs for you. All proofs you need to take action on will be in your inbox. Proofs in progress that you have sent out will be found in your sent box, and ones that need their setup completed will be found in your outbox. When a proof is approved it is automatically moved to the approved area.

Tip: You can use the global search by typing / on your keyboard.

2. Actioning a to-do list

When a to-do list has been returned, the proof will be moved to your inbox. There are 3 ways to action the to-do list:

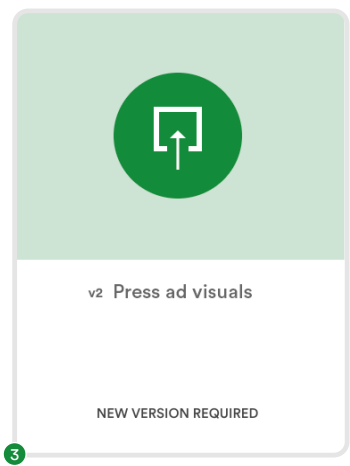
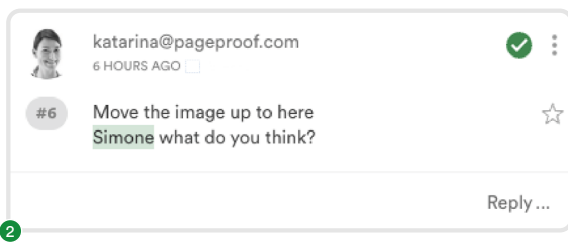
- Print the comments sheet , or
- Assign the proof to an editor (someone who will make the changes) in the manage pane, or
- You will do the changes yourself.

Mark each to-do that has been actioned as done . You can reply to to-dos if you like.

Tip: Use the filter at the top of the comment pane to filter for to-dos.



PageProof guide for owners



3. Uploading a new version

When you're ready to upload a new version, click the cog icon to open the manage pane and select upload new version.

The proof tile in your dashboard inbox will display in a file dropper icon.

Drag and drop the new file on top of this proof tile. The new version will inherit the setup of the previous version, but you can change the workflow (amend the workflow used previously, choose a new workflow template, or create a new workflow from scratch).

Tip: You can start the workflow at a different step if you like. Even skip previously approved reviewers.

4. Managing your proof

When a proof is in progress you can nudge or skip reviewers to help move the proof along in its workflow. Click the info icon to open the proof info pane and take action on reviewers who have not finished by clicking the icon.

Tip: You can also nudge reviewers from the decision pill by clicking the icon.

If a proof is in progress and you want to upload a new version before the workflow has been completed, click the cog icon and select **upload new version**.

Deleting, replacing the proof file, manually archiving, reverting decisions, and other functions can be performed under the manage pane.

