Adobe Workfront

Reviewing 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.

Adobe 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

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 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 Workfront One:

- **FAQ — Desktop proofing viewer**

- **Differences between the web proofing viewer and the desktop proofing viewer**

- **Understand the desktop proofing viewer**

- **Install the desktop proofing viewer for your organization**

- **Install the desktop proofing viewer**

- **Update the desktop proofing viewer**

DESKTOP PROOFING VIEWER
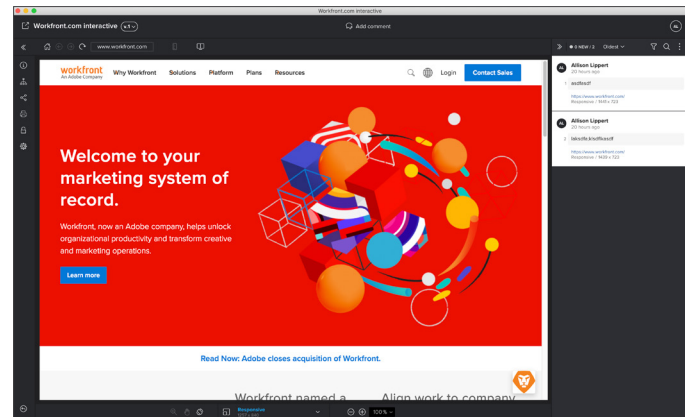

WEB-BASED PROOFING VIEWER
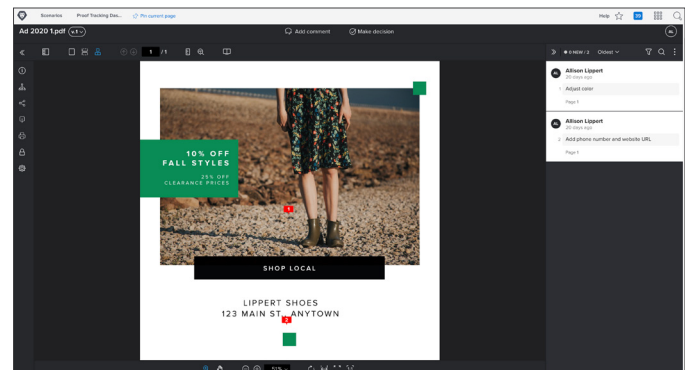
Receive a proof to review

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.
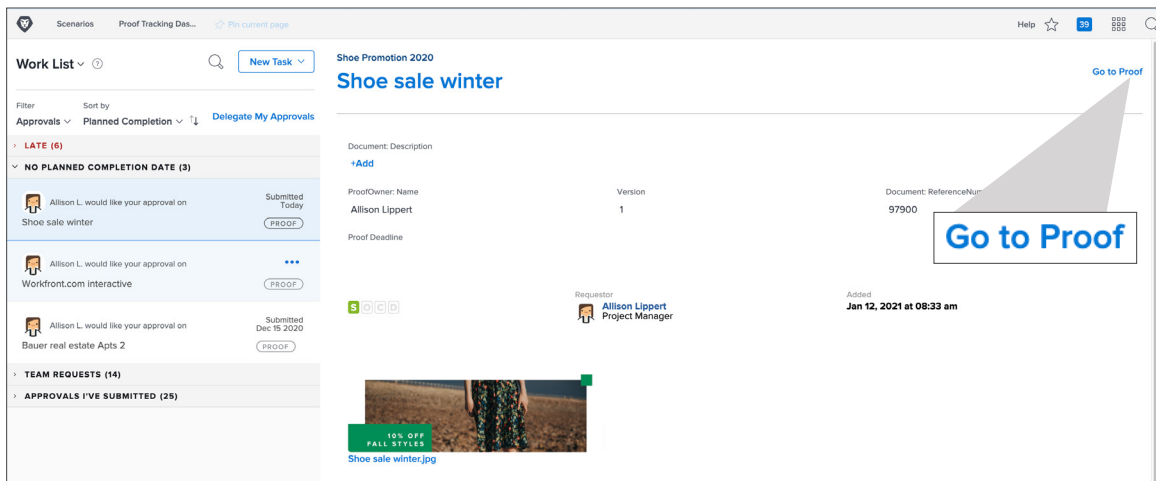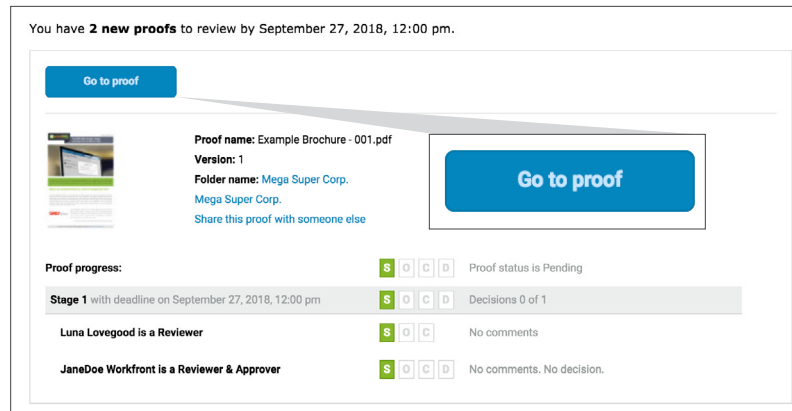
PROOF APPROVALS IN HOME

1. Manage proofs that need your approval in Workfront Home. Proofs where you are assigned as a Reviewer only 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 on the right side of the window shows the details about the asset.

4. Click Go to Proof 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] Search the content of the proof (not available for all file types).

[G] Compare proof versions.

[H] Add a comment and/or markup.

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

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

[K] Collapse/expand the comments column.

[L] Filter comments.

[M] Search comments.

[N] Make a comment, reply to a comment, attach a file to a comment, etc.
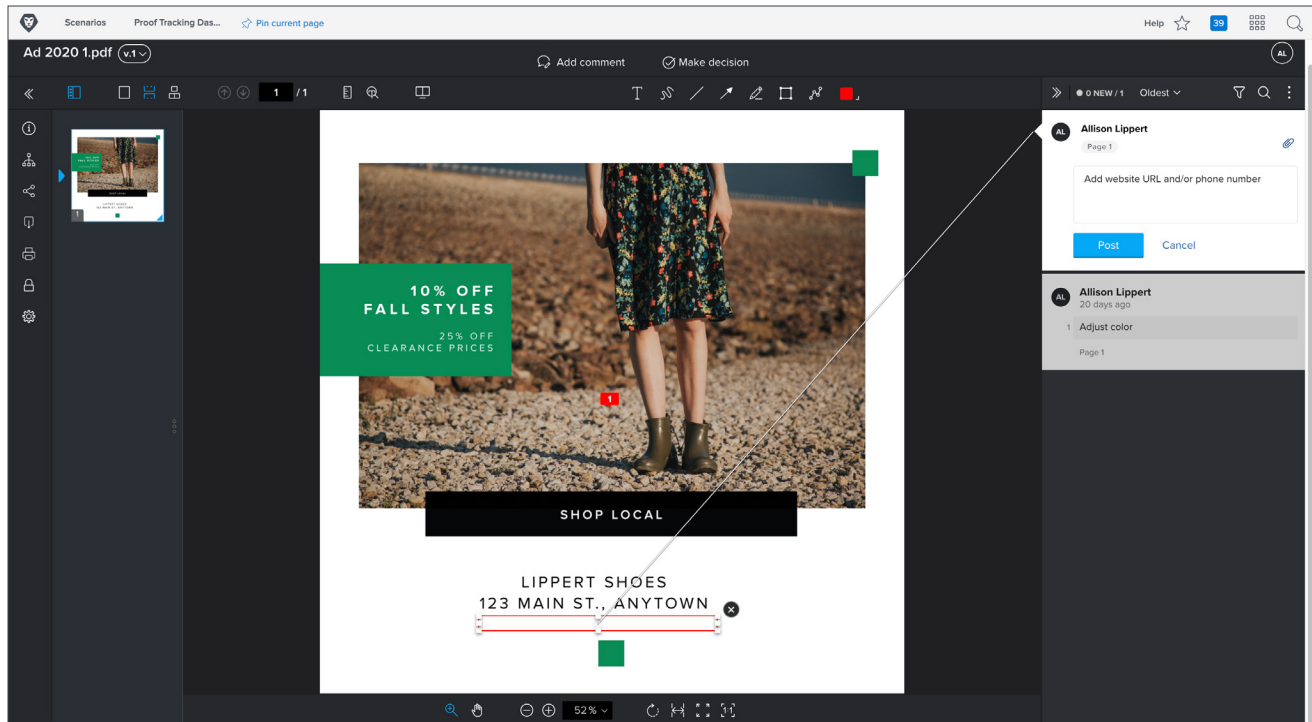
[O] Move the proof around within the window.

[P] Change zoom percentage of the proof.

[Q] Options for fitting proof within the viewer window.

[R] Access proof workflow, details, print comments, adjust viewer settings.

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.

2. A comment box opens on the right side of the viewer.

3. Enter your text for the comment.

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.
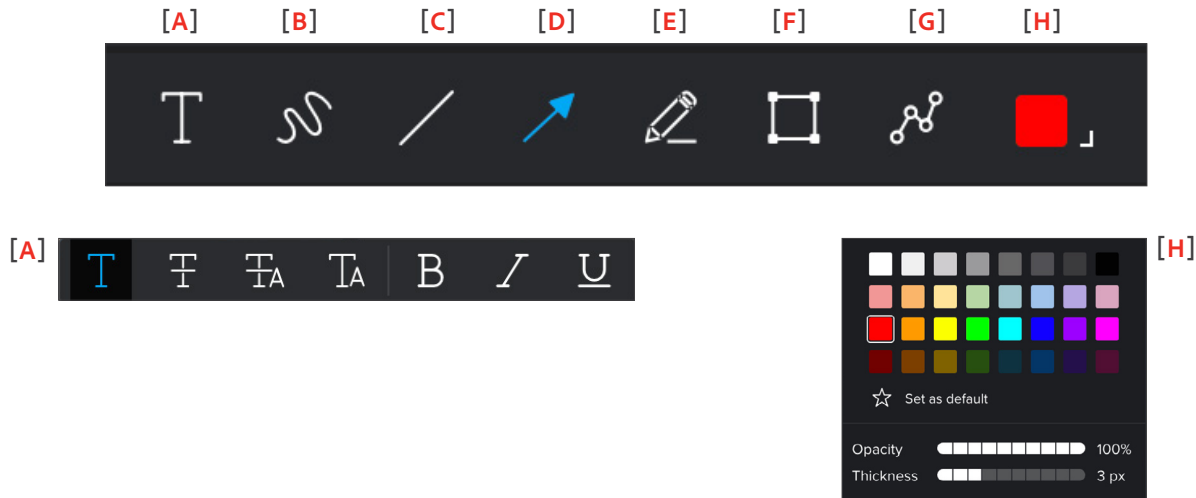
MARKUP FLAG

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 a section on the proof to help clarify a comment or question.

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

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

[B] **Freehand line**—Draw freehand lines and shapes on the proof.

[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. Helpful when trying to highlight odd shapes on a proof.

[H] **Color palette**—For each of the tools, you can change the color of the highlight or drawing. For the drawing tools, you can set the opacity and thickness of the line. Select a tool, then select the color before you start drawing.

View comments

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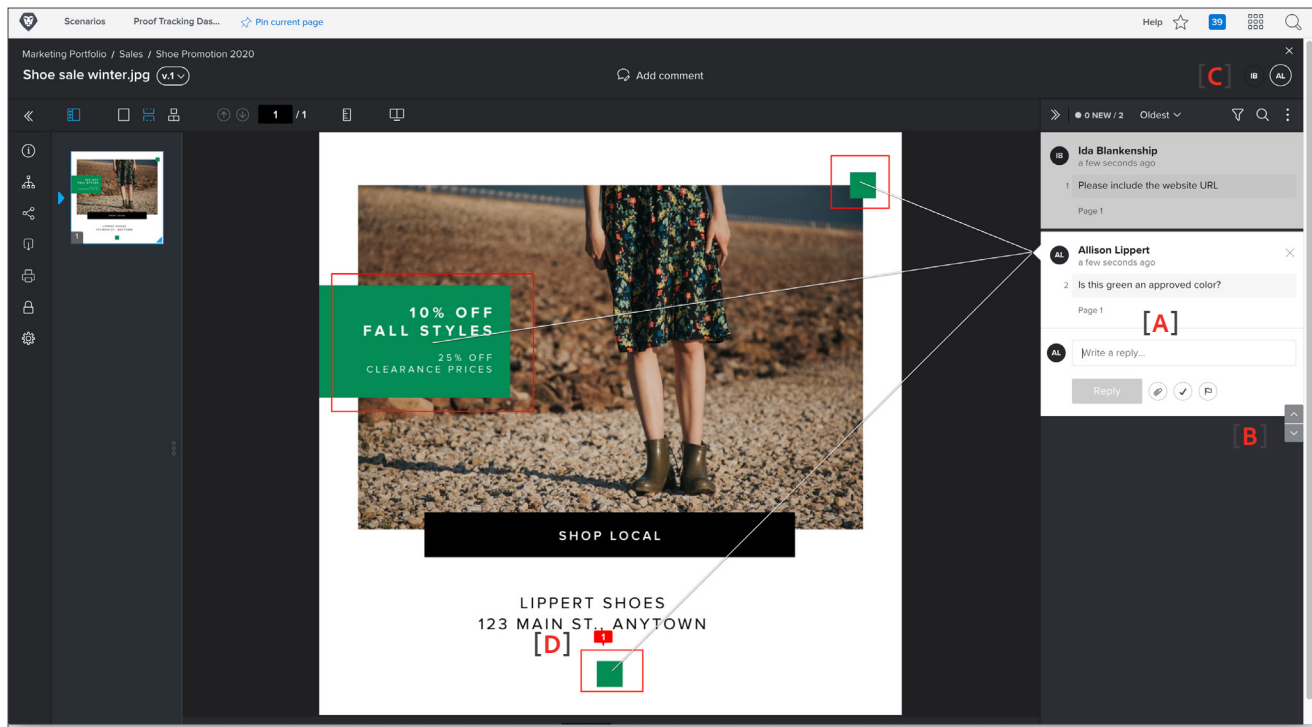
VIEW ALL COMMENTS

[**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.
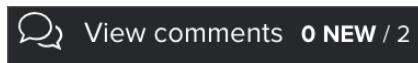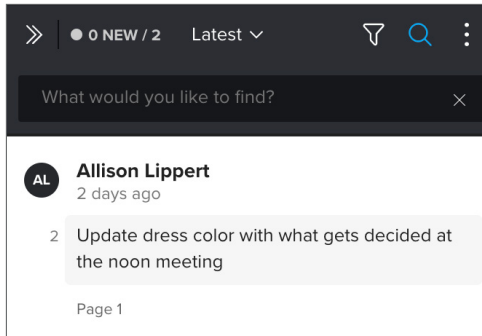

Collapse the column again by clicking the double arrow icon ⟫.

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.
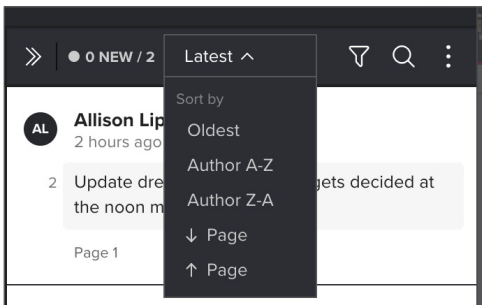
SORT COMMENTS

Click the list 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 displays comments in relation to the page number. A timestamp option is available when looking at video proofs.
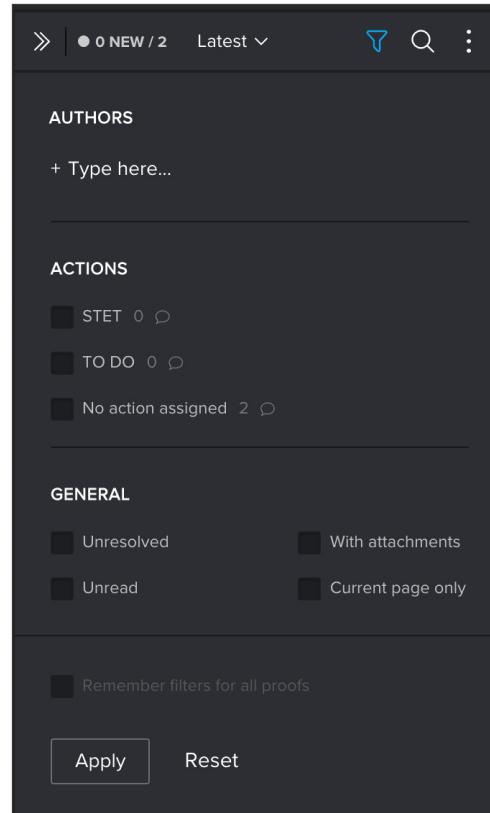

FILTER COMMENTS

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.

3. To display comments with a specific action applied, check the boxes next to the action names.

4. Click the Apply button to run the filter. Click Reset to see all comments again.

Reply to comments

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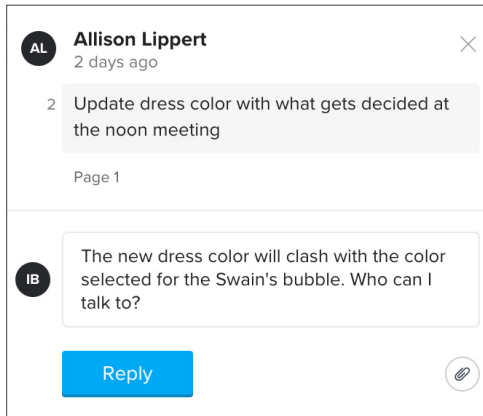
REPLY TO A COMMENT

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

2. Type your reply in the field at the bottom of the comment.

3. Click the Reply button.

Each response is timestamped when it's saved so you can tell when the response was posted.
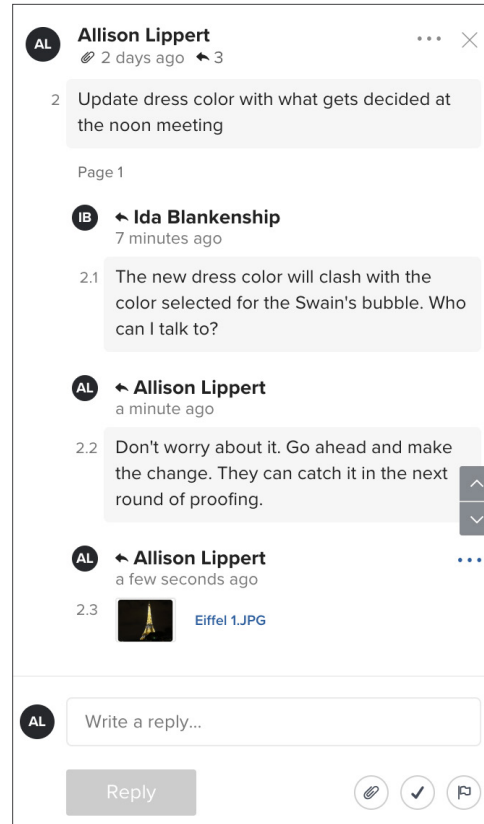
ATTACH A FILE

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

2. Click the attachment icon (the paperclip).

3. Navigate to and select the file. Click Open.

4. Click Reply to complete the upload.

To download an attached file, click the link in the comment and 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

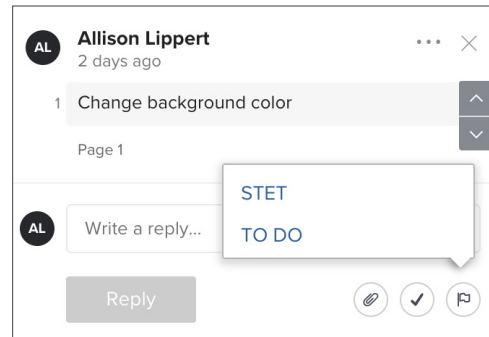Once a comment has been addressed, click the resolve icon (the check mark). This places a green check mark at the top of the comment, letting others know the comment has been resolved. Workfront records who resolved the comment and when as a reply to the comment.
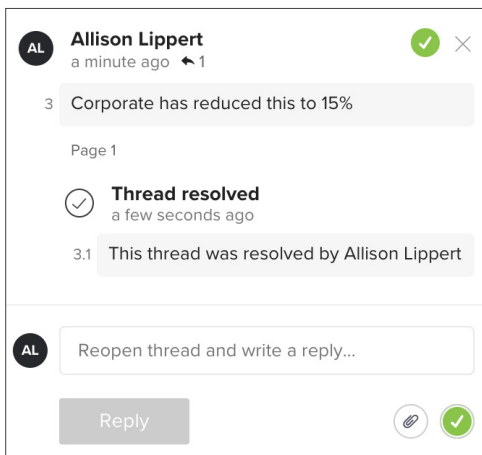
To reopen the comment, click the green check icon. This, too, is recorded in the comment replies.

APPLY AN ACTION

Actions are an optional feature for comments that can be used as part of your organization's proof workflow.

Click the action icon (the flag) at the bottom of the comment. Or click the 3-dot "more" menu in the top corner of the comment.
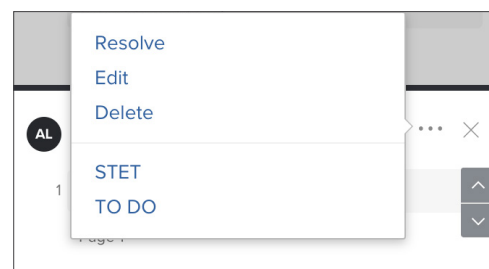
Select an action. The action and who applied it are recorded in the replies to the comment.

Remove the action by clicking the icon again and selecting Remove.

Compare proof versions

Compare different versions of the same proof to make sure revisions were made before approving the final asset.
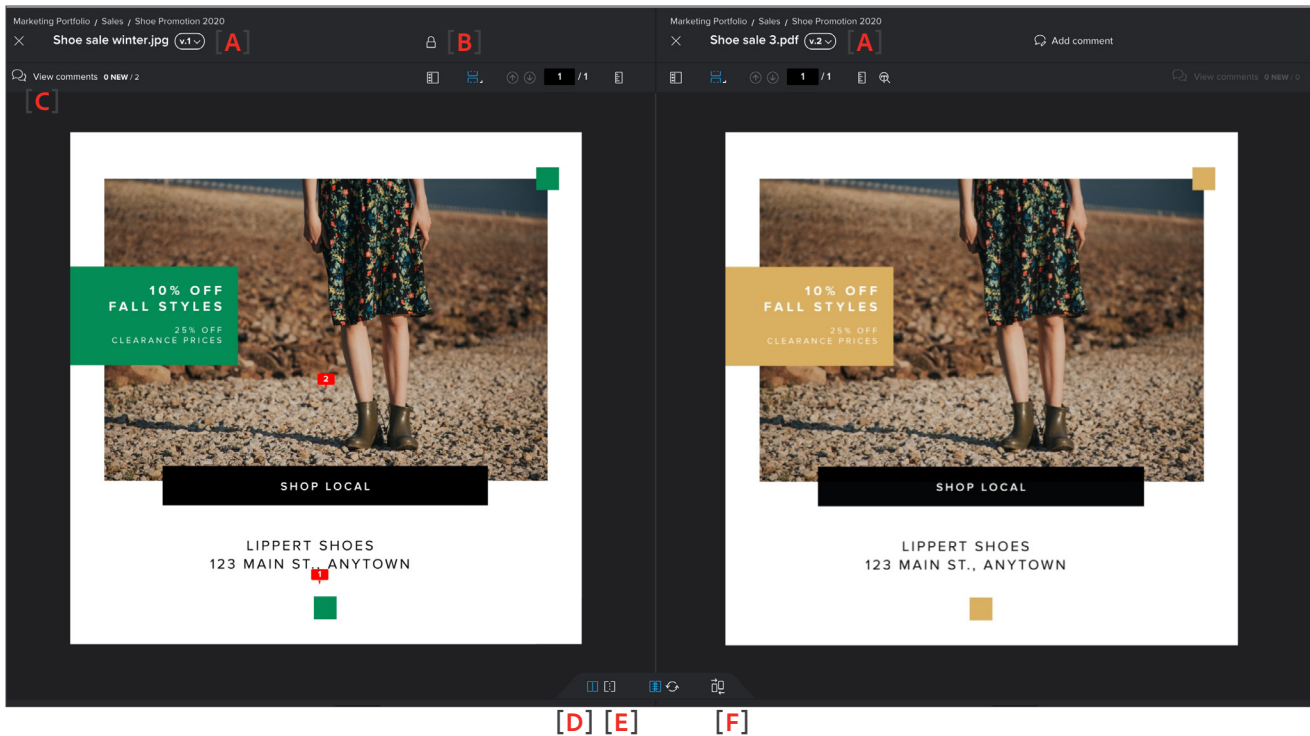
1. Open the proof into the proofing viewer.

2. Click the compare icon ⬜.

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

When you're done comparing the proofs, click the X in the corner of the version you want to close.

Learn more about comparing proofs on Workfront One with the article **Compare proofs in the proofing viewer.**

COMPARISON OVERVIEW

[A] Name of the proof version displayed in that part of the window. 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. Each version has its own comments column.

[D] Side-by-side comparison of the proof versions.

[E] Overlay comparison of the proof versions.

[F] Autocompare is a pixel-level highlight of the differences between versions.

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.
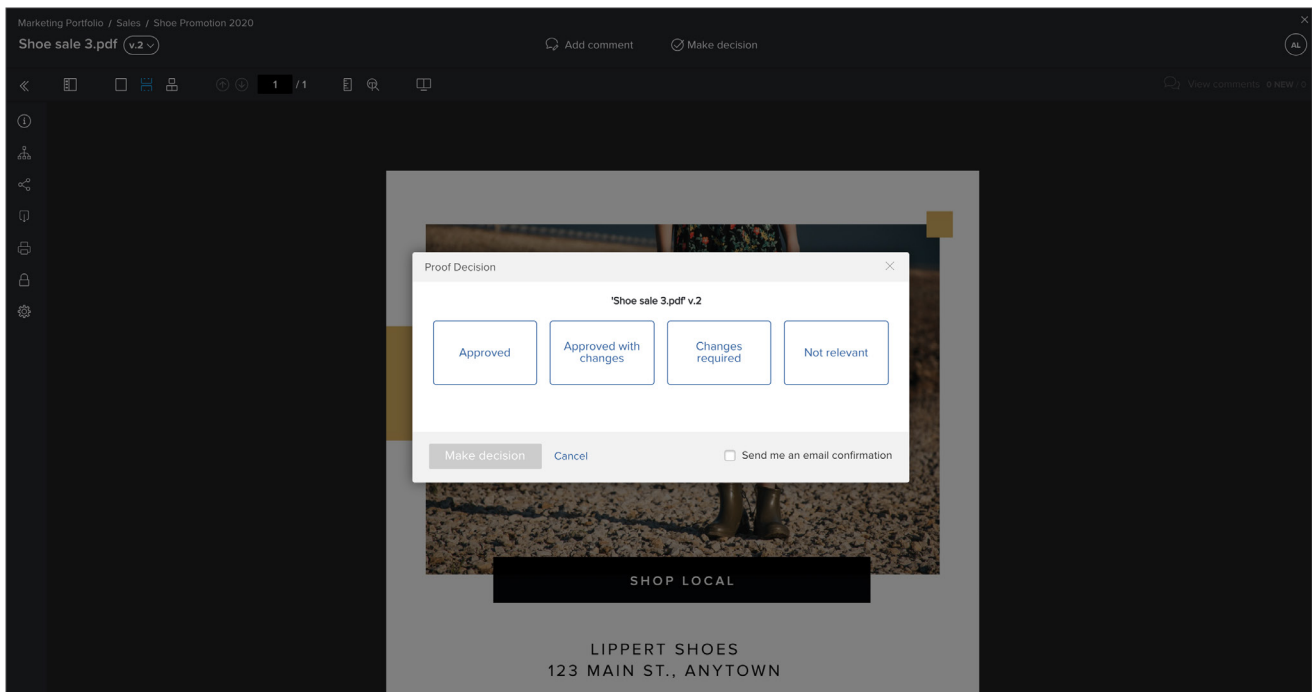
1. Click Make decision at the top of the viewer.

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

If you don't see the Make decision option, this means the proof manager doesn't need you to make a decision on the proof.

Learn more in the Workfront One article, **Make a decision on a proof**.

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 isn't needed or relevant to the process.

Additional tools in the viewer

Hover over the left panel menu to access additional tools you might need when working with proofs.

ⓘ	Proof Details
⛶	Workflow
⤴	Share
⬇	Download
🖨	Print
🔒	Lock
⚙	Settings
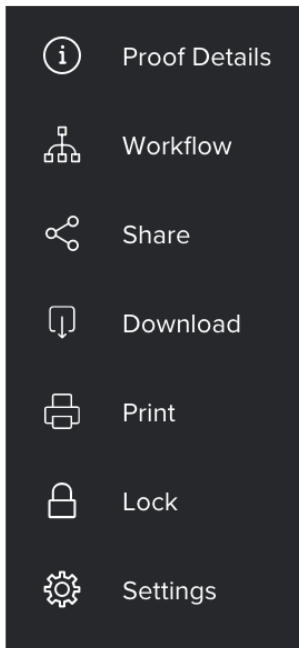
Proof Details—Find the file name, proof owner, creation date, and proof status. Click the Proof Activity panel to see information about when the proof was uploaded, when new versions were added, and more. Learn more in the Workfront One article, **View activity on a proof in the proofing viewer**.

Workflow—The panel shows the overall proof status, as determined by the decisions and actions made on the proof by all proof recipients in every stage of review. You can also see the actions taken by each recipient. Find more details in the **Review a workflow in the proofing viewer** article.

Share—Copy a shareable link to the proof, grab the proof's embed code, or add individual users to the proof. You must have the proper permissions to add recipients to the workflow. The article **Share a proof from the proofing viewer** provides information on who can share a proof.

Download—Click to download a copy of the original file the proof was generated from. This does not download comments or other proof information.

Print—Save a summary of the proof comments in a spreadsheet or PDF. You can include thumbnails of the proof, if desired. Get more information in the **Print a proof summary within Workfront** article**.**

Lock—When a proof is locked, no further comments or markups can be made. This also prevents users from making decisions on the proof. The **Lock or unlock a proof** article on Workfront One provides more information.

Settings—Establish your personal proofing viewer settings, such as showing the markup pins on the proof and how the text tools will be displayed. Learn about all the options in **Configure proofing viewer settings**.

Proofing terminology

	DEFINITION
At Risk	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.
Comments	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.
Deadline	The deadline requires that all comments and decision are made on the proof by a specified date and time.
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.

	READ ONLY	REVIEWER	APPROVER	REVIEWER & APPROVER	AUTHOR*	MODERATOR*
View a proof	X	X	X	X	X	X
Add markups		X		X	X	X
Add comments		X		X	X	X
Edit your own comments (if there are no replies)		X		X	X	X
Make a decision			X	X	X	X
Edit or delete comments (made by others)						X
Edit the proof					X	X
Add proof recipients					X	X

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

Email alerts

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

Email alerts are separate from the notifications you receive when there's a new proof to review or when a proof is late. Even if email alerts are set to Disabled, you are still notified of a new proof or version.

	DESCRIPTION
All activity	Email is sent any time there is activity on the proof (comments, replies, or decisions). A good option if you need to keep an eye on an urgent project.
Replies to my comments	Email is sent when someone replies to a comment you made.
Decisions	Email is sent when a reviewer/approver makes a decision on the proof (approve, reject, etc.). A good call-to-action for people managing the review, signaling that one of the reviewers is done leaving comments.
Final decision	Email is sent when the last reviewer/approver in the last stage of the review makes a decision on the proof (approve, reject, etc.).
Hourly summary	Email is sent with a summary of all comments, replies, or decisions, only if a change occurred in the last hour. Sent at the top of the hour, only if there is new activity on the proof within the past hour.
Daily summary	Email is sent with a summary of all comments, replies, or decisions, only if there was activity in the last day. Sent once a day at midnight.
Disabled	No alert emails are sent regarding proof activity. However, users still receive the new proof and new version emails.

Monitor progress and status

Track the review progress of your proof using the progress bar, instead of digging through your email for updates.
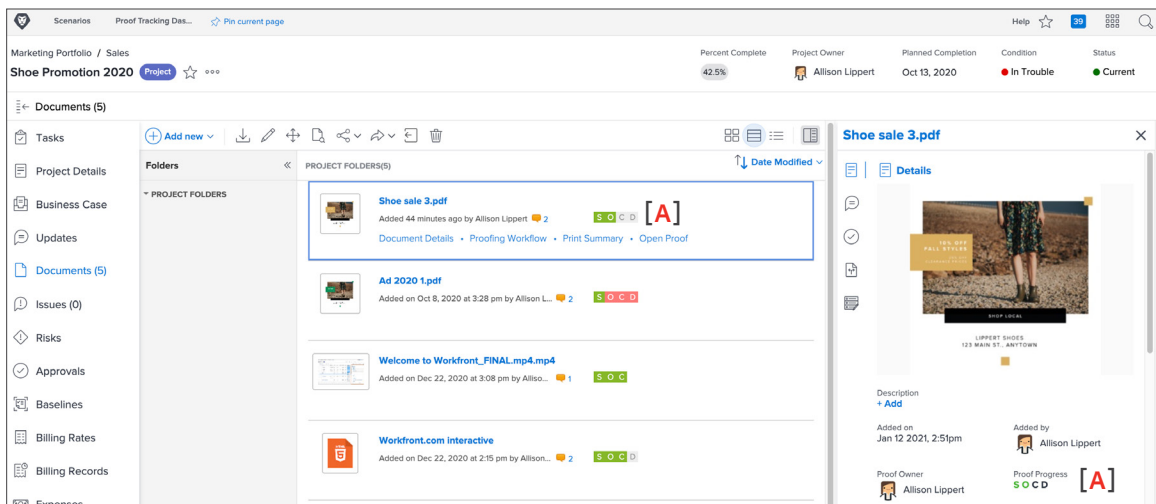
[A] PROGRESS BAR

The progress bar represents the overall progress of the file through the review and approval workflow. The progress bar appears in the Documents list, in the Details panel, in the proofing viewer, and other places in Workfront.

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 not in 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 approvers' decisions.
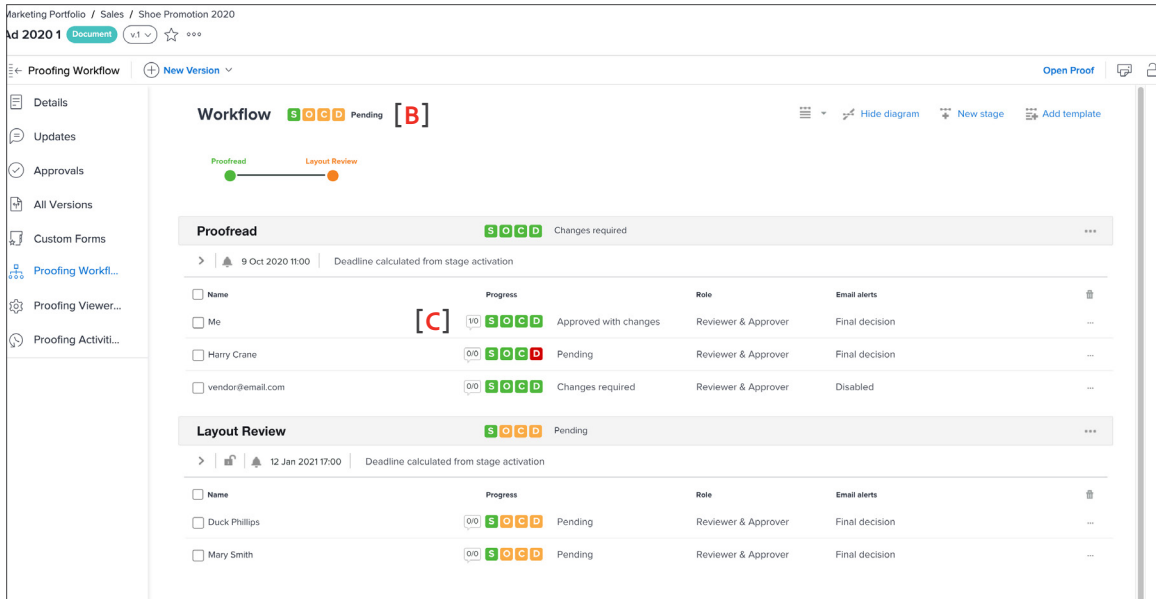
See the progress and status of the proof and each recipient assigned to the proof by clicking Proofing Workflow from the Documents page in Workfront. You also can open this window from the Workflow icon in the proofing viewer's left panel menu.

[B] WORKFLOW STAGE STATUS

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 selected the Approved option and one said Changes required. The Changes required status overrules the other decisions and serves as the overall proof status.

See **View the progress and status of a proof** for more details.

[C] REVIEWER/APPROVER STATUS

The progress bar indicates what step of the workflow each recipient is at, with the status indicating if they made a decision.

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

The ability to make changes in this window depends on your proofing permissions.