# PageProof guide for reviewers

1. RECEIVING A PROOF

When you receive a proof invitation email, click **VIEW PROOF**

PageProof will automatically create your account and keep you logged in. If you change your browser or device you originally used to view the proof on, you will be asked to log in – don't worry, click FORGOT PASSWORD? on the login screen to set a password for yourself you will remember.
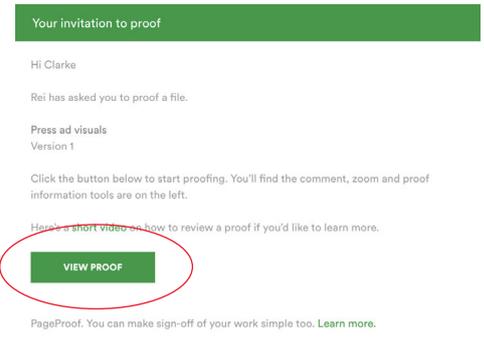
What is your role?

A proof can involve one or many reviewers. Everyone on the proof will get a red pen to add comments. PageProof will let you know if you have been given a special role when you open 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 the proof, but also decides whether the proof is approved on their behalf 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.
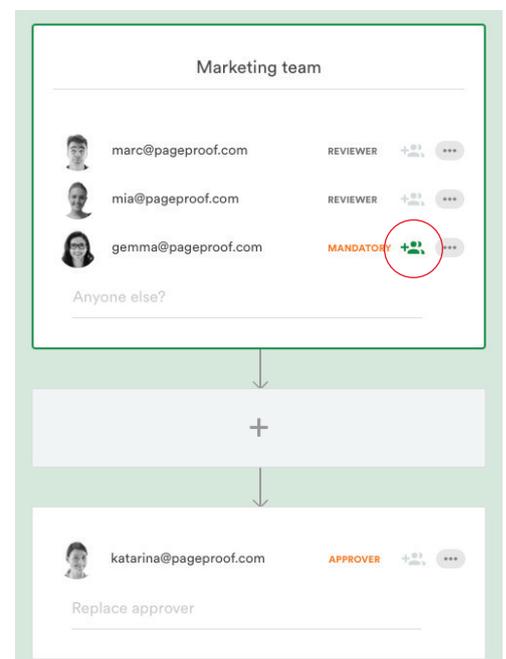
Approver
The difference between a gatekeeper and approver is that the approver has the ability to give **final approval** on the proof. They decide whether the proof is approved as is, or is returned to the designer with to-dos. The approver is last in the workflow.

To see your role and the roles of others, click the proof info ⓘ icon to see the workflow.

Want to invite someone to review the proof?

Displayed next to each reviewer in the workflow is the **inviter** 👥 icon.
If the icon is green you are able to share the proof with others. Add someone by simply entering their email address into the workflow. Rest-assured, only those in the workflow and the proof owners will be able to see and comment on the proof*.

*Forwarded email invitations or url links will not work for anyone who is not officially added to the proof.

2. ADDING A COMMENT   reviewer, mandatory reviewer, gatekeeper and approver

To add a comment, select the red pen ✏️ tool to the left of the proof, click on the proof and write your comment. Use the @ symbol in your comment to mention another reviewer.

Click the attachment 📎 icon to add a file to your comment e.g a logo, image or revised copy.

Click the zoom 🔍 icon to view the proof in more detail and rotate.

Click the send ➤ icon for each comment you make.

When you are finished, click the green **FINISHED** button.

Red pen tip: **Click** to add a pin. **Click + drag** to add a line. **Click + drag** diagonally to add a box.
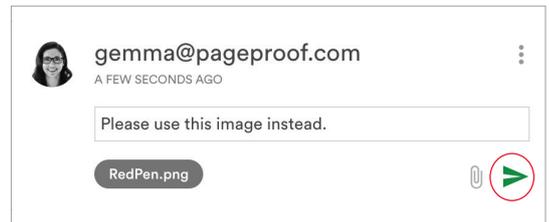
3. RETURNING A TO-DO LIST   gatekeeper and approver

When reviewers are finished reviewing the proof and comments have been added, it is time for the gatekeeper or approver to return a list of comments marked as red to-dos.

Mark each comment as a red to-do ✅. Comments you don't want actioned leave gray ➖.
There is a mark all **MARK ALL** button for ease.

If you want to lock the proof whilst you review, click the lock 🔓 icon - this removes the red pen from other reviewers in the workflow.

When you are finished, click the green **SEND TO-DO LIST** button.

4. APPROVING A PROOF   gatekeeper and approver

If you want to approve the proof, if there are comments, make sure they are marked as gray ➖.

Gatekeeper: When you are finished, click the green

APPROVE & UNLOCK button. The proof will move on in the workflow.

Approver: When you are finished, click the green **APPROVE** button.

If you want to lock the proof whilst you review, click the lock 🔓 icon - this removes the red pen from other reviewers in the workflow.

When the proof has been given final approval by the approver, the proof owners will be notified and the proof is auto-archived into the approved area of the dashboard. To access your dashboard click the logo in the top left hand corner of the proof screen.

5. GOING BACK TO A PROOF

- Click **VIEW PROOF** in the proof invitation email
- Use the search 🔍 on the dashboard
- Click the notifications 🔔 icon on the dashboard to see recent activity on your proofs.

More help is available using the in-app chat with the PageProof team, or visiting https://help.pageproof.com or https://pageproof.com/youtube.