



# PageProof guide for owners

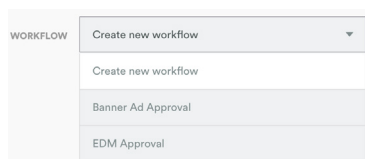
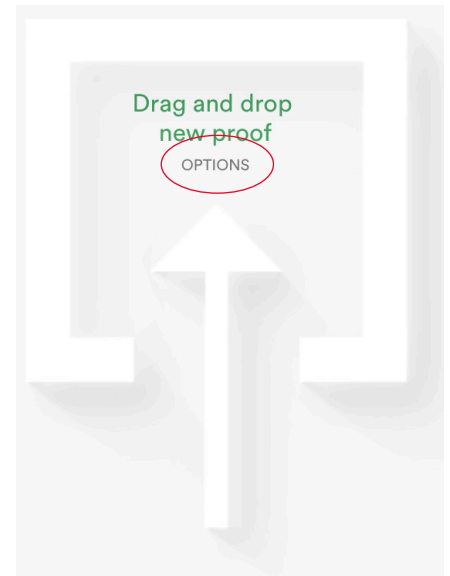
## 1. CREATING A PROOF

Drag and drop your file onto the dashboard file dropper, or click for pick up options (Dropbox, OneDrive, a url link etc).

In the proof set-up screen, check the name, tags (useful for searching and grouping), set a deadline and add a message to your reviewers that will go out in the email invitation.

If you do not want reviewers to be able to download your original file, set download to off  OFF  ON .

Choose an appropriate workflow for your proof; either create a new workflow from scratch, or choose a workflow template that has been previously set-up.



## What is a workflow?

A proof can involve one or many reviewers. Workflows contain these reviewers along with their permissions. Everyone on the proof will get a red pen to add comments, including proof owners. PageProof will let your reviewers know if they have been given a special role when they 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

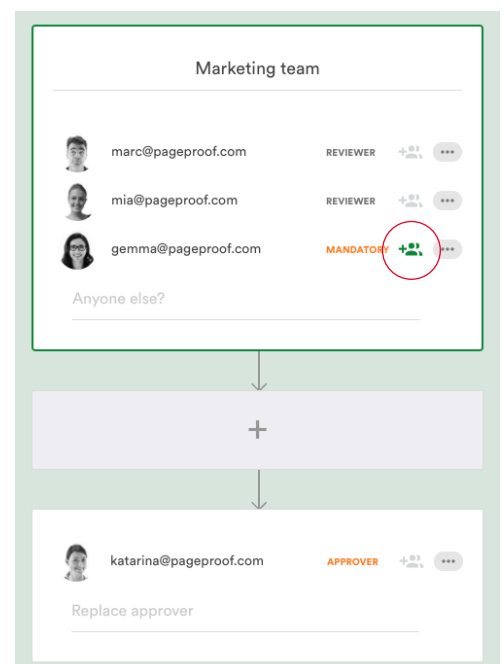
The difference between a gatekeeper and approver is that the approver has the ability to give **final approval** on the proof. They decide whether the proof is approved as is, or is returned to the proof owner with to-dos. The approver is last in the workflow.

## Need a reviewer to add others to review the proof?

Displayed next to each reviewer in the workflow is the **inviter** icon. If the icon is green the reviewer can share the proof with others. Other reviewers are added by simply entering their email address into the workflow.

Rest-assured, only those in the workflow, you and other 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.*



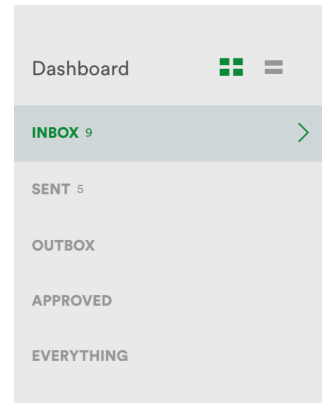


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## 2. YOUR DASHBOARD

Your dashboard manages 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.



## 3. ACTIONING A TO-DO LIST

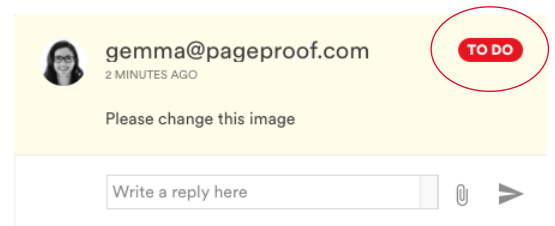
When a to-do list has been returned, the proof will be moved to your **inbox**. There are 3 ways to action the to-do list:

1. Print the comments sheet  or
2. Assign the proof to an editor **SEND TO EDITOR** (someone who will be doing the changes) or
3. You will do the changes yourself.

Mark off each to-do **TO DO** that has been actioned as done **DONE**.  
You can reply to to-dos if you like.

When you have finished, click the green upload new version

**UPLOAD NEW VERSION** button.





## 4. UPLOADING A NEW VERSION

When a proof is waiting for a new version, a file dropper icon will be displayed on the proof tile in your **inbox**.

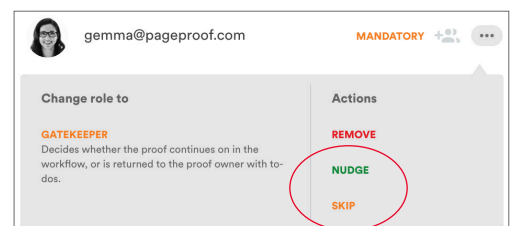
Drag and drop the new file on top of this proof tile. The new version will inherit the setup of the previous version, but you can change the workflow (amend the workflow used previously, choose a new workflow template, or create a new workflow from scratch) if you like.

## 5. MANAGING YOUR PROOF

When a proof is in progress you can **NUDGE** or **SKIP** reviewers to help move the proof along in its workflow. Open the proof info pane and take action on reviewers who have not finished by clicking the  icon.

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

Deleting, unlocking, manually archiving and other functions can be performed under the manage pane.



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