7 STEPS TO SUCCESSFUL ONLINE PROOFING

A FREE EBOOK FROM GOPROOF

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> *The best thing about GoProof is that it works directly through InDesign and Illustrator. You don't have to save your document as a PDF and then email it to your reviewers. It does it all seamlessly.*

DAVID Q., MUSEUMS & INSTITUTIONS, 201-500 EMPLOYEES

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Here are the 7 key steps to a successful online proofing workflow. Implement these and you should start reaping the time-saving, collaboration and cost benefits straight away.

STEP 1: the content

Once you or your colleagues have finished the initial creative work, save up and get together the content you want to send for proof.

Do the files you want to share need to be export ones, like PDFs, JPGs, MP4s, PNGs? Or are you working within a design package like Adobe Creative Cloud and want to send your work directly from inside there?

The process for proofing work can be streamlined further depending on which file route you are taking, as you'll see in Step 2.

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Our office split and we have proofing staff that relocated to a different building. We had relied on paper proofing but with the move, that no longer made it an option. It has enabled us to send proofs to staff anywhere, and with more precision in markups and functionality.

THAI M., RETAIL, 201-500 EMPLOYEES

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STEP 2: sending proofs for review

In good online proofing software you should have the option to share content in at least two ways.

Export file uploader.

This is the simplest method to upload export files. It's done by browsing to files stored either on a local machine or network or in a cloud system such as Dropbox and then uploading them to the proofing website portal. It's the basic way to submit export files or documents such as PDFs for review.

Direct from Adobe Creative Cloud.

Most graphic designers and video producers use an Adobe app such as InDesign, Premiere Pro or Photoshop to produce creative work. Proofs can be shared straight from inside these apps using extensions or plugins created by the proofing software provider, cutting out the lengthy process of needing to export files into another format first and then use the file uploader.

The interface inside the software guides you through the process of sharing your work. Depending on the product, the options may include setting deadlines, attaching files, allowing copy edits, creating teams of collaborators, adding custom messages and more.

On completion of the wizard, all collaborators invited to the proof receive a notification via email or mobile app with a secure link to the proof.

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STEP 3: assigning collaborator roles

An important part of the review process for any creative team is to be clear on who has what responsibility. It's an often contentious subject with regular confusion on who should be doing it.

These responsibilities could be for numerous things including commenting, copy editing, inviting new collaborators, requesting changes, uploading files and signing off work.

Online proofing simplifies this by allowing the sender to assign roles to collaborators so that the software manages their responsibility.

Here's an example of a role structure.

Observer
Someone who can view proofs but not make any comments or join in the conversation.

Reviewer
Someone who can view proofs, make any comments, @mention others and upload files.

Gatekeeper
The person with the most responsibility who has the same profile as a Reviewer but can take the extra steps of adding new collaborators, requesting changes for new versions and sign proofs off.

Collaborator roles play a major part in keeping reviews on track with full accountability throughout the creative journey.

STEP 4: proofing and collaboration

One of the biggest advantages of online proofing is having just one proof that everyone looks at and comments on, rather than separate copies being routed around on emails or print-offs.

Based securely on the web and accessed via a browser or mobile app, the proofing interface may vary in terms of features and layout but the fundamental purpose is to allow collaborators to review the proof and express their opinions as easily as possible.

It's vital to give collaborators the most effective ways to convey their thoughts and make comments with pinpoint accuracy. Designers can then clearly understand what the feedback is and importantly where it's taking place on the proof.

On the following page are some of the features you should expect to see in the collaboration zone of a proofing system.

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Collaborator status

It so useful just to know who has actually **Seen or Not Seen** the proof, regardless of whether any action has been taken on it.

This is something that online proofing can easily track as part of the current status display of the collaborator, with other examples being **Finished, Requested Changes** or **Signed Off**.

Proofing tools

Online proofing is a huge leap forward from confusing long-hand statements written in the body of a separate email along the lines of 'that round image needs to be smaller and less obvious'.

Look out for the following proofing and mark-up tools: **Box, Highlight, Draw, Strike, Pin, Zoom, Question, Ruler, Arrow, Check, Cross**.

Commenting

Using comment threads next to the proof, collaborators can easily see who's saying what and inspire each other to produce the most amazing creative results.

Using **@Mentioning** is a great way to engage with each other and speed up the review.

Copy editing

A big barrier to efficiency within the proofing process comes when edits are required to the copy on it.

Traditionally, a copywriter or collaborator would have to email the copy separately on an email or attached Word document, which the designer would have to cut and paste and reformat into the proof document.

Online proofing software makes this process easy by allowing editors to submit copy in the same way they would make a comment, cutting out extra work and time.

History

Reviews regularly go through a number of versions until one is approved for sign-off. Seeing the history of comments and comparing previous versions with the existing one is an essential part of this.

File sharing

To keep things simple and in one place, online proofing allows everyone to share files when making comments. This could be anything from a replacement logo, to an instruction video or a spreadsheet of financial information.

Proof Status

Online proofing helps to clarify the key stages or milestones of work as it moves through the creative journey. It's done by collaborators with the relevantly assigned role placing the proof into a specific status such as In **Review** or **Changes Requested.**

This way everyone can see that a new version is currently being created or that the review
is still open for comments.

Printing

If a hard copy or screen grab of the proof with comments displayed is still required for traceability or procedural compliance, proofs can be printed off to paper or PDF and archived away.

STEP 5: getting change requests back

In a similar process to sharing and sending proofs out for review, there are two main ways for creatives to receive feedback from reviews and take action on them.

The collaboration zone

The most common method where creatives track the comments being made next to the proof and then work out what needs doing.

Once a proof has been marked for a new version to be produced, the creative sets to work on the source file (normally an Adobe Creative Cloud one), referring back to the proofing software throughout the process.

Directly from inside their Adobe apps

This is where maximum productivity is achieved for creatives.

Using an extension that sits inside the Adobe app, creatives can receive all the comments, changes and files right into their document or video side panel.

It means they don't need to jump out of Creative Cloud to get at the feedback and can see it exactly in context, page by page. And they can just hit 'Apply' to place copy edits directly into the document.

It saves hours in rework time and reduces cut and paste errors. It's an insane benefit and should be top of the list when considering online proofing software.

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STEP 6: sending new versions

The creative produces the new version of the proof inside their design software and then follows the same process as before to share it for the next review round.

Note that it's key to find an online proofing software provider that does not limit the number of proofs you can send out to encourage maximum collaboration returns.

Proofing software helps to streamline the new version sharing by remembering the settings from the previous review. These could be handy automations like adding the collaborators involved and allocating a new version number to the proof to make it easy to trace.

Alongside this, insights are generated through reporting engines to help creative teams to evaluate how much time is being spent on changes and rework which can be used to measure output against forecasted time.

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STEP 7:
final sign off

The last of the 7 key steps to successful online proofing is signing off a creative version, ending the active review.

In most cases this can only be done by a collaborator assigned with the appropriate role to protect the proof from being published without correct permission or authority.

Throughout the whole process, collaborators should be able to manage and keep on top of their reviews. For example, a proof dashboard with advanced search is a place where they can filter on status, project, client, deadlines and more, as well as revisit old proofs for auditing.

> " *GoProof has streamlined the workflow process, eliminated PDF and asset file issues and bridged the gap between communication with our clients. Our clients are happy with the system as well!*

SHAWNEE O., PRINTING, 11-50 EMPLOYEES

About GoProof

GoProof is a leading review and collaboration software platform that helps brands, agencies and publishers streamline creative processes, saving a ton of time and energy.

It's part of the **Oppolis Cloud** software stack alongside **GoPublish, GoCopy** and **GoVersion**. The Oppolis Cloud products seamlessly integrate to inspire creative and marketing teams to create better together.

Oppolis Software has a history of building progressive partner innovations for Adobe creative software since 2003. Its success has come from optimising design and production workflows, energising team collaboration and make the transformational steps into digital content and app production easy.

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Thanks for reading!