



User Guide Reviewers

Version 1.0

How to review a proof using ProofHQ

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Introduction

Welcome

Welcome to the ProofHQ Reviewer's Manual.

ProofHQ is an exciting, new, and innovative web 2.0 application that enables you to manage review and approval of large designs and documents and share them with workgroups, teams, colleagues, or clients in a completely online proofing work flow.

About This Manual

This manual will provide you a detailed understanding of the online proofing tools available in ProofHQ.

Conventions

This guide uses the following conventions to highlight certain words and phrases that differentiate their meaning visually.

Table 1: Conventions used in this guide

| This style... | Indicates | For example: |
|----------------|--|---|
| <i>italics</i> | Notes regarding special information about a feature | <i>Note: You can also...</i> |
| bold | A feature of the interface or functionality within ProofHQ | To open the document click on the Open button. |

Online Support and Services

The following services are available if you need technical support or require additional information:

- The ProofHQ web site at <http://www.proofhq.com> provides information about ProofHQ and related services and includes a number of video tutorials to better explain how the proof interface works.

Opening a Proof

A proof can be opened in a number of ways including:

- From a personal link in an email message,
- From your ProofHQ account, or
- From a Miniproof or Public URL.

From a personal link in an Email Message

When you are added as a reviewer to a proof in ProofHQ, you will automatically be emailed a personal link to the proof. To open the proof in ProofHQ, simply click on the link in the email which will open the proof in your browser.

The link looks like this:

<http://www.proofhq.com/index.php/file/page/code/d98046a19167531309953>

To open the proof from an Email Message:

1. Open the New Proof email
2. Click on the link in the email. This will open the proof in your Internet browser.

Note: The link is personal to you and will open the proof with you already identified as the reviewer. It is important that you do not forward the link to anyone else or any comments that they make will be in your name. If you want to allow someone else to view or review the proof, you can copy and paste the Public URL (see the chapter on Public URLs) or add the person as a proof reviewer.

From your ProofHQ account

If you are a registered user of ProofHQ, your ProofHQ account contains information about all the proofs which you have sent or received.

To access your account:

1. Point your browser to www.proofhq.com

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2. Click on the Login button in the upper right-corner of the homepage
3. Enter your email address and password

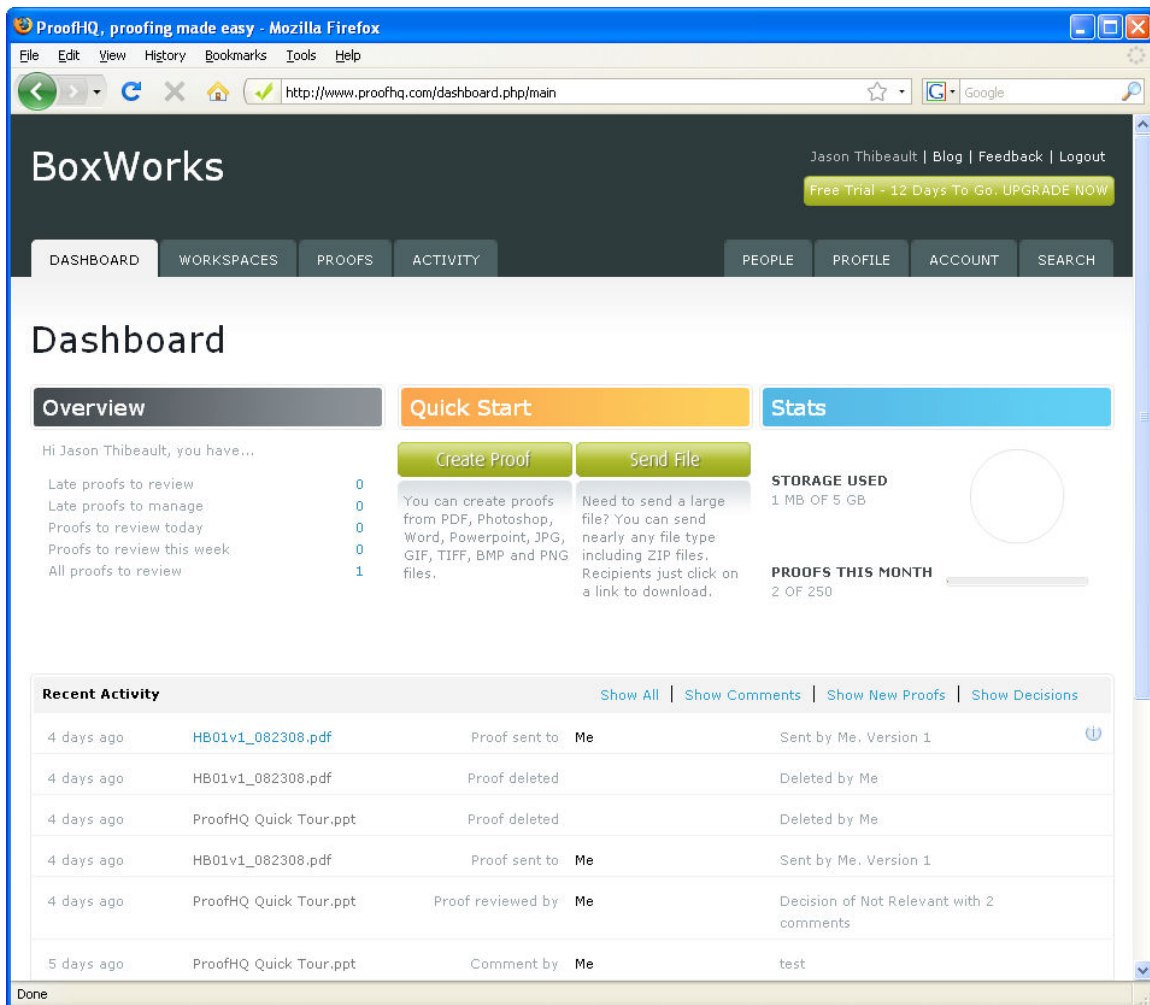


Figure 1: ProofHQ Account Dashboard

4. Click Log Me In. Upon successful authentication of your credentials, your ProofHQ dashboard page will be displayed.

When your login to ProofHQ you will find information about proofs and links to proofs on nearly every page. Clicking on any **thumbnail** or **filename** will open the proof:

- **Dashboard**—this gives you an overview of your activity in ProofHQ.
- **Workspaces**—this displays a list of the workspaces that you have access to. You can click to open a Workspace and then click on proofs in that Workspace.
- **Proofs**—this displays a list of the proofs that you have access to. To open a proof, click on the thumbnail or filename in the list.

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- **Activities**—this displays a list of activities on all of the proofs that you have access to.

From a Miniproof or Public URL

You can access a proof from the Miniproof or the Public URL

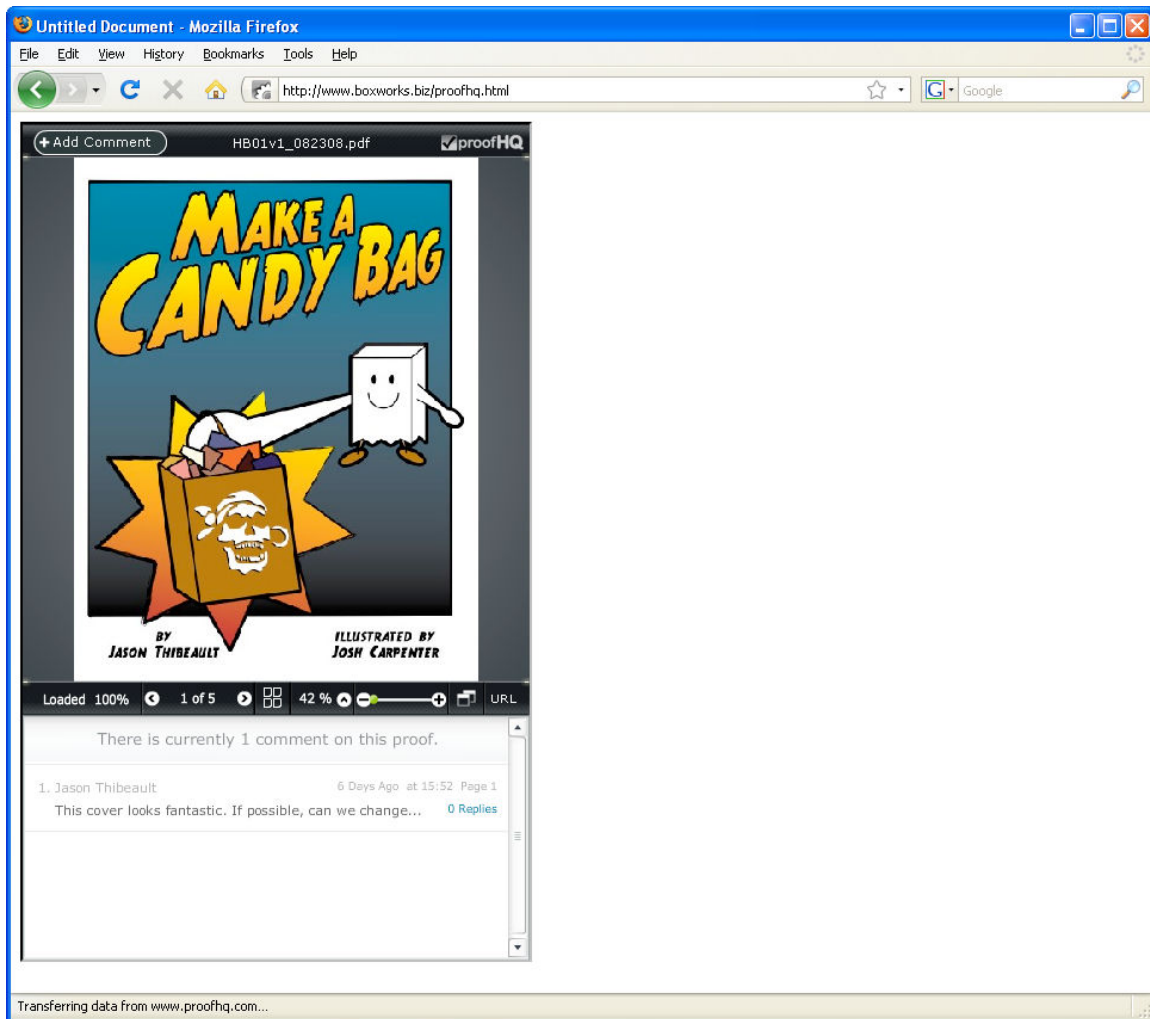


Figure 2: Miniproof via Embedded URL

The **Miniproof** is a widget that lets you embed a proof in a web page, blog or wiki. The Miniproof shows the proof, all existing comments and mark-ups.

The **Public URL** is a URL that opens the proof but does not log you in automatically.

To access the proof from a Miniproof or Public URL;

- Users login using email and password
- Non-users subscribe by entering a display name and email

Login to a proof (users)

If you are a ProofHQ user you can **login** to the proof from a Miniproof or Public URL as follows:



Figure 3: Miniproof

1. In the Miniproof click on the Full Screen button (highlighted by the red box above), the New Comment button or the Reply button
2. The full proof page opens with a **Login or Subscribe** window showing
3. Enter your email and password in the **Login section**
4. Click Login. This will open the proof into the browser window so that you can interact with it through the Reviewer Interface.

*Note: If you are not already a reviewer of the proof, you will be added as a reviewer automatically and sent a **New Proof email** notification.*

Subscribe to a proof (non-users)

If you are not a ProofHQ user you can **subscribe** to the proof from a Miniproof or Public URL as follows:

1. In the Miniproof click on the Full Screen button, the New Comment button or the Reply button
2. The full proof page opens with a **Login or Subscribe** window showing
3. Enter your display name and email in the **Subscribe section**
4. Click **Subscribe**
5. If the proof owner has not enabled **Subscriber Validation** you will be logged in to the proof immediately
6. If the proof owner has enabled **Subscriber Validation** you will not be logged in to the proof. You will receive a **New Proof email** and must click on the personal link contained in that email

*Note: If you are not already a reviewer of the proof, you will be added as a reviewer automatically and sent a **New Proof email** notification.*

Using Passcodes

Passcodes are another method to further secure your proof from unauthorized viewing or commenting. To set a passcode for a proof, click on the **Enable Link** on the Proof Details Page. This will generate a unique 6-digit passcode.

Once the passcode option has been set, any time a reviewer is added to the proof, the email that they receive with the proof link will also include the passcode.

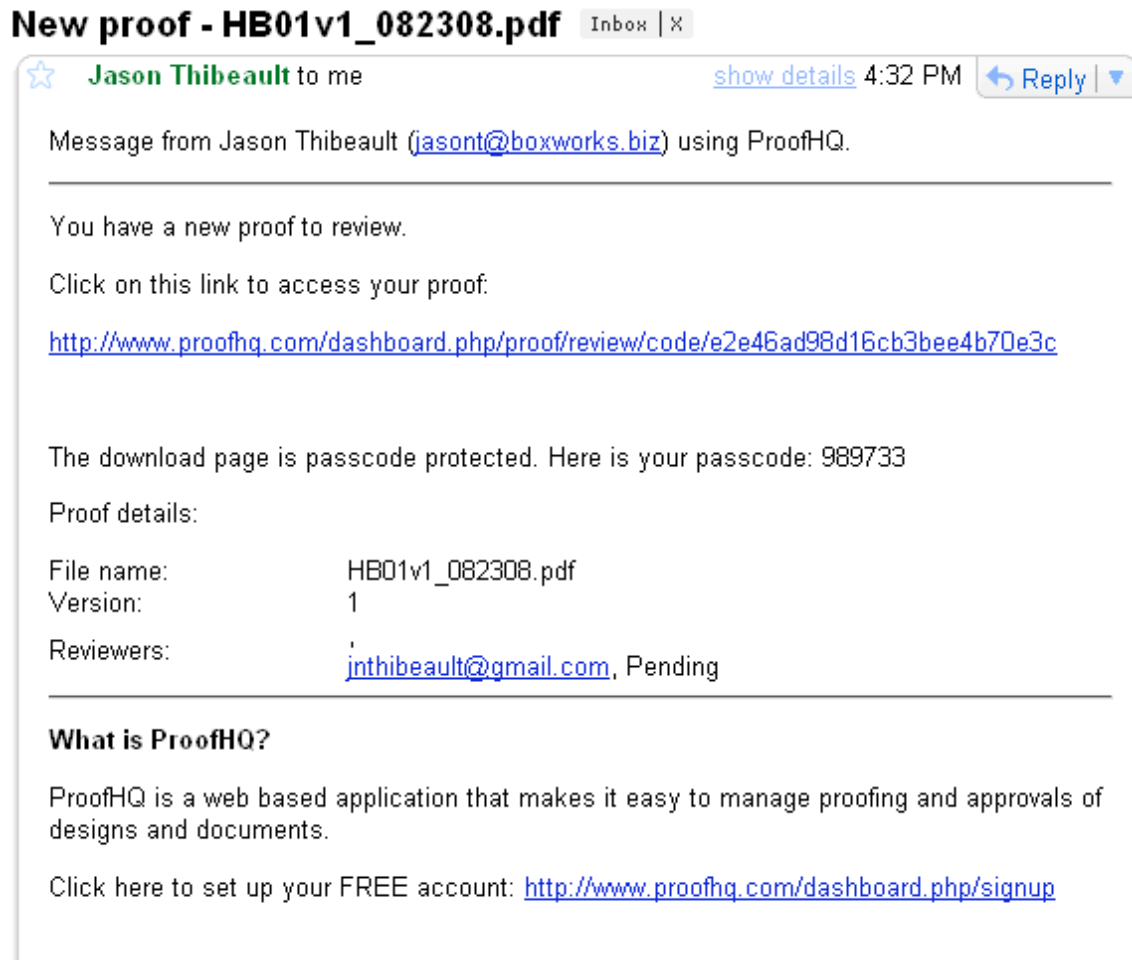


Figure 4: ProofHQ Email with Passcode

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When the user receives the ProofHQ invitation email with the proof link and the passcode, opening the proof to review is simple:

1. Click on the link in the email. This will open the **Enter Passcode Page** in your Internet browser.

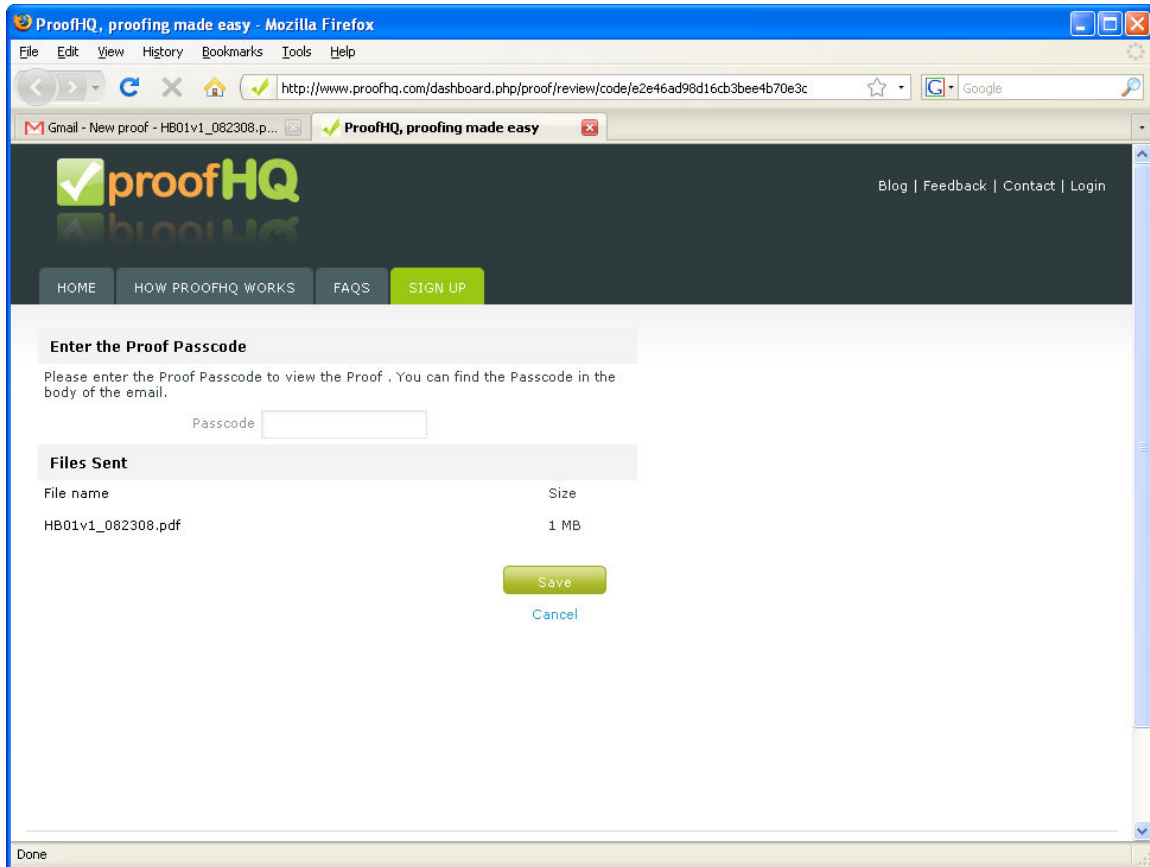


Figure 5: View Proof via Passcode

2. Enter the passcode in the Passcode field and click the **Save Button**. This will open the proof and log you in.



Proof Overview

This section provides a quick overview of each part of the proof.

Once you have opened a proof, you will have access to a number of simple and easy-to-use online review and approval tools.

Understanding the Proof layout

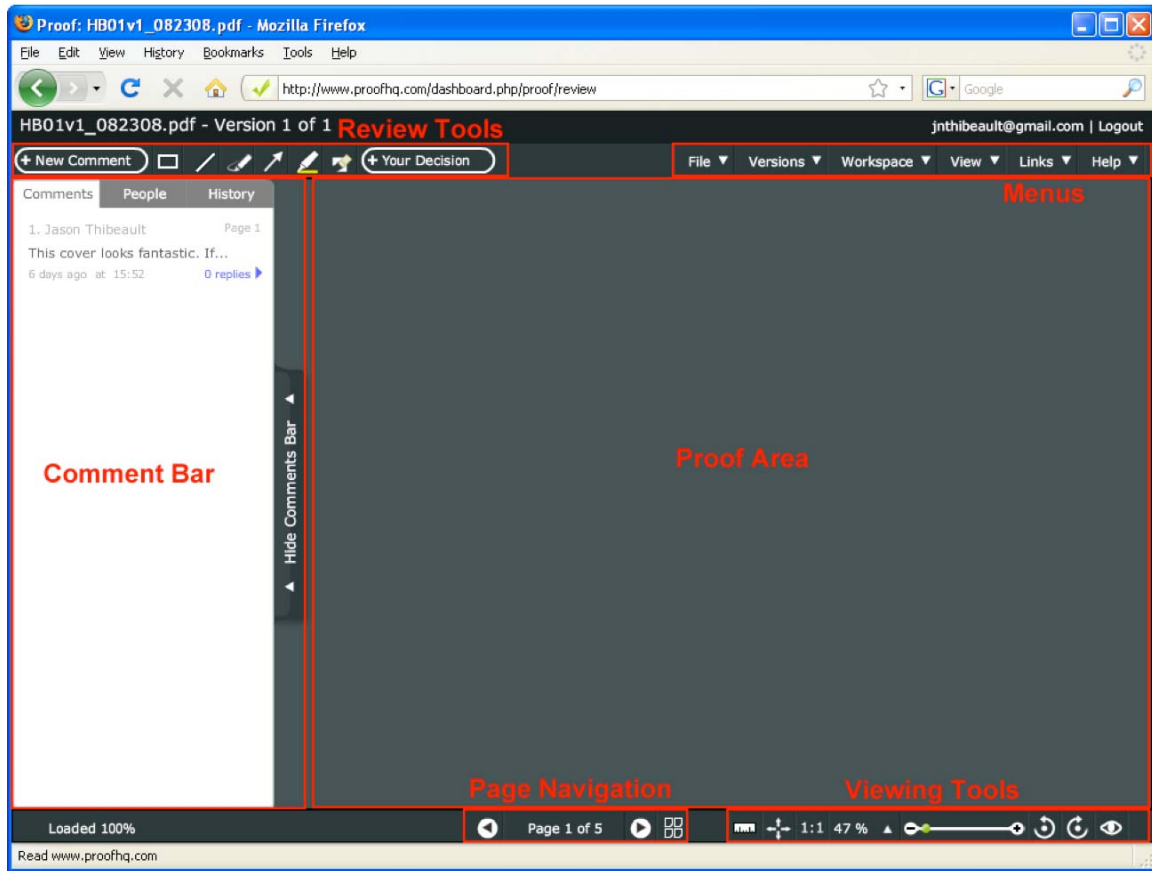


Figure 6: Reviewer Interface Sections

The proof is divided into the following primary areas:

- Review Tools
- Menus
- Comments Bar
- Page Navigation
- Viewing Tools
- Proof area

Review Tools



Figure 7: Reviewer Tools Menu

The review tools, located at the top left of the proof, provide simple and easy mark-up and commenting, plus the decision function. These include:

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- New comment
- Mark-ups
 - Box shape
 - Straight line
 - Freehand line
 - Arrow
 - Highlighter
 - Eraser
- Your Decision

Menus



Figure 8: File Menu

The menus, located at the top right of the proof, allow for a number of quick actions available by clicking on the menu item and selecting an option from the drop-down:

- File options
 - Add People
 - Email Notifications
 - Printable Screen
 - Send File
 - Download Original
 - Delete This Proof
 - Proof URLs
- Versions
 - Jump to other versions of the proof
 - Create a new version
- Workspaces
 - Jump to other proofs in the same workspace
 - Jump to other workspaces
- View
 - Show or hide the Comments Bar
 - Show or hide the Overview window
 - Show or hide the navigation Controls
 - Show or hide the Mark-ups

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- Show or hide the Tooltips
- Links
 - Jump to Proof Details page
 - Jump to Proofs list
 - Jump to Workspaces list
 - Jump to Dashboard
- Help.
 - Play ProofHQ Demo Movie
 - Jump to Forum
 - Jump to Blog
 - Download Centre

Comments Bar

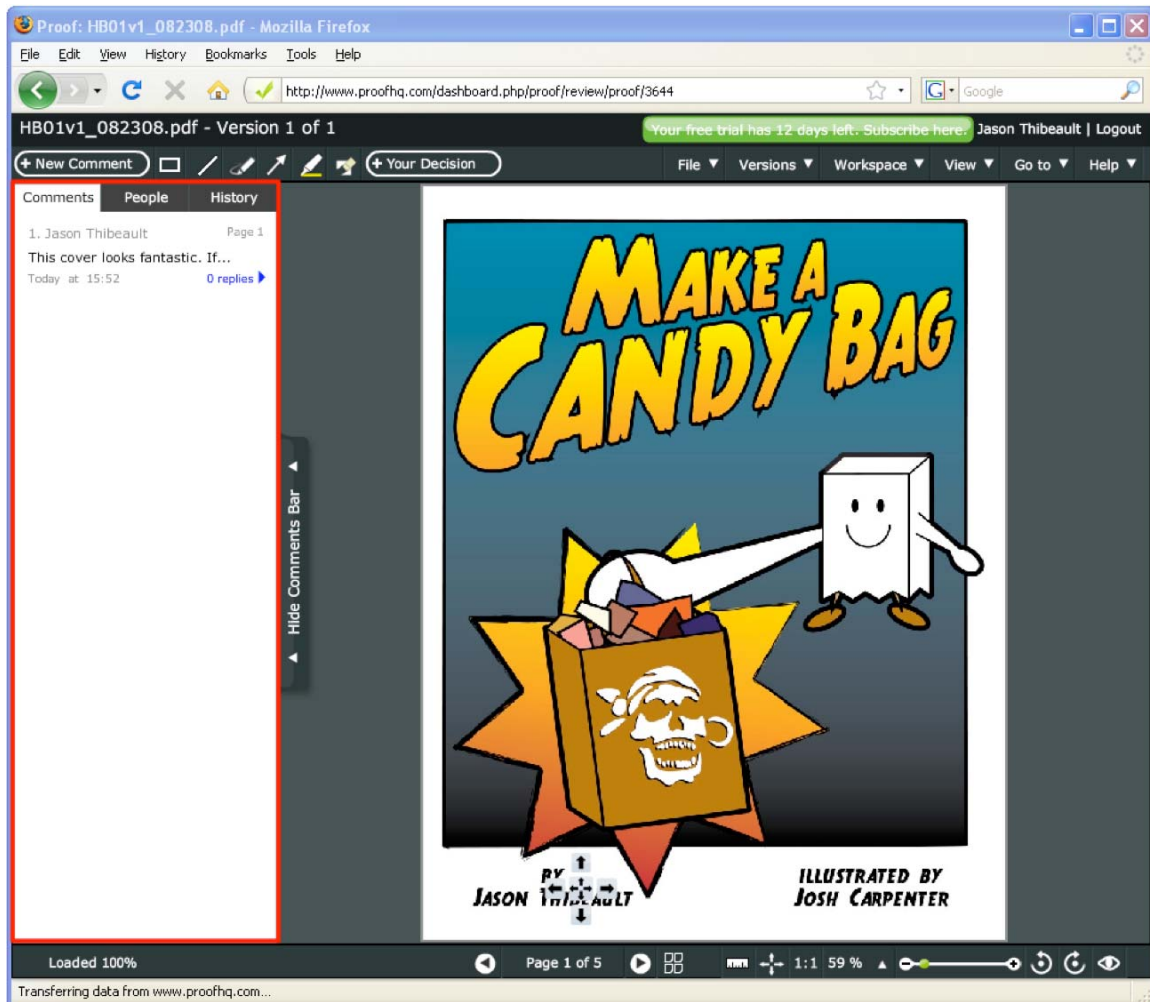


Figure 9: Expanded Comments Bar

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The Comments Bar is located on the left-side of the proof and can be expanded or collapsed by

- Clicking on the **Comments Bar tab** on the left side of the proof
- Using the Comments Bar setting in the **View menu**
- Using the Comments Bar setting in the **Context menu** (right click your mouse)

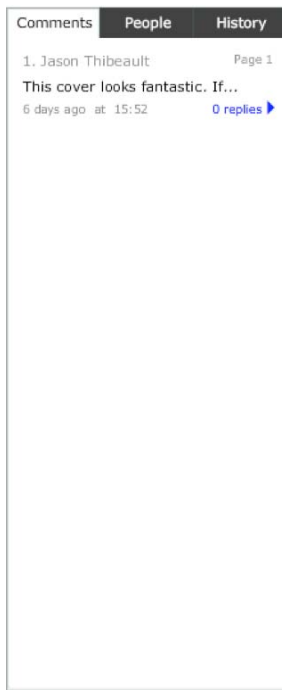


Figure 10: Comment Bar (Comments Tab)



Figure 11: Comments Bar (People Tab)



Figure 12: Comments Bar (History Tab)

When expanded, the Comments Bar displays the following three tabs:

- Comments List,
- People, and
- History.

Comments List



Figure 13: Comments Tab (Close-up)

The **Comments List** tab provides a running list of the current comments made about the proof listed in the order in which they were made. You can see the reviewer name, the page number, the comment text (truncated) and the number of replies. Hovering over the comment will display the comment and any replies. Clicking on the comment in the list will open the **Comment window** on the proof and display any mark-ups related to the comment.

People

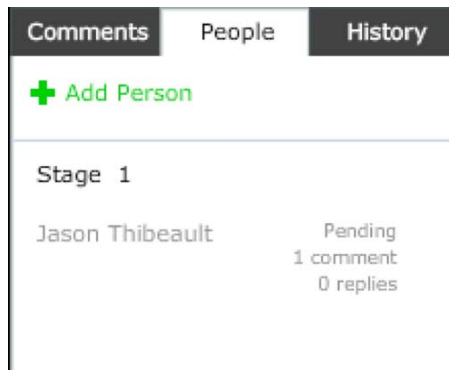


Figure 14: People Tab (Close-up)

The **People Tab** is a list of all of the people who have been added to the proof as reviewers. It shows the person's name, decision, number of comments and number of replies. There is also an **Add Person** button at the top of the tab to add more people.

History



Figure 15: History Tab (Close-up)

The **History Tab** shows the activity that has taken place on the proof in date order. It includes proof opens, comments, replies and decisions with information and the date/time of each.

Page Navigation



Figure 16: Page Navigation Tools

Page navigation is managed both at the bottom of the proof as well as by manipulating the document itself.

The **Page Navigation tools** at the bottom of the proof are:

- Navigation to the **previous page**
- Navigation to the **next page**
- Jump to any page using the **thumbnail view**

You can also move the proof using the **Navigation controls**. Click the arrows to move the document up, down, left, or right.

Using just the mouse, you can **click-and-drag** to move the page inside the proof.

If you have a PC mouse with a **scroll wheel**, you can scroll from page to page.

Viewing Tools



Figure 17: Viewing Tools

The Viewing Tools are in the lower-right hand corner and enable you to modify how the document is displayed. These tools include:

- **Measure** an area of the document
- Zoom using the **fit-to-page preset** button
- Zoom using the **100% preset** button
- Zoom using the **preset scale** button
- Zoom using the **zoom slider**
- Rotate counter clockwise
- Rotate clockwise
- Show/hide the **Overview window**

Proof Area

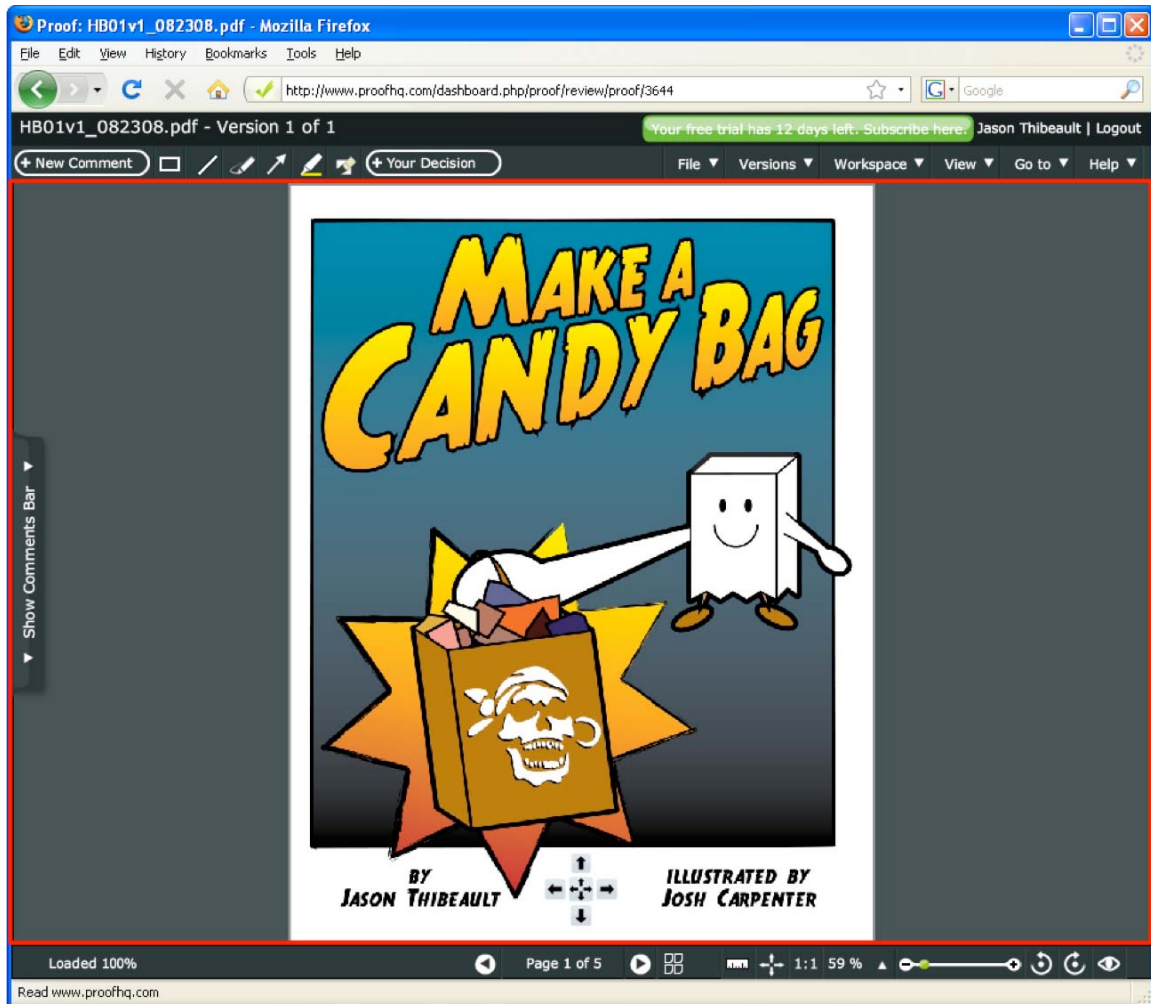


Figure 18: Proof Area

The proof area is the main area of the proof in which the document is displayed for proofing



Reviewing a Proof

Comments and Mark-ups

Adding comments and mark-ups to a proof is one of the core functions of ProofHQ.

It can be done quickly and easily by clicking on the **New Comment** button or one of the **Mark-up** icons.

New Comment



Figure 19: New Comment Toolbar Button

To add a new comment:

1. Click on the **New Comment** button in the upper-left corner of the proof
2. The **New Comment window** will open in edit mode

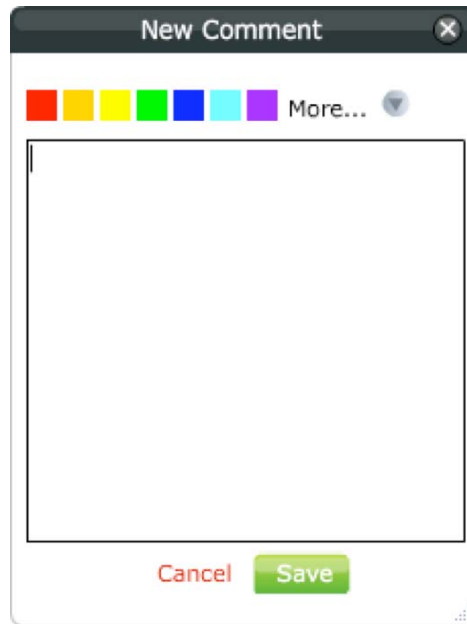


Figure 20: New Comment Window

3. Start typing your comment in the **text area**
4. Add one or more **mark-ups** to the proof
5. Click **Save** to save your comment and mark-ups

Note: when you open the New Comment window, you will notice that the cursor changes to the Mark-up Cursor. This is because most comments will be associated with mark-ups on the page (i.e., a box highlighting an area). However, you can make a comment without adding a mark-up.

Note: you can add multiple mark-ups to a single comment

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Open an existing Comment

To open to an existing comment:

1. Click on one of the **Mark-ups** in the proof or on a comment in the **comment list** of the Comment bar

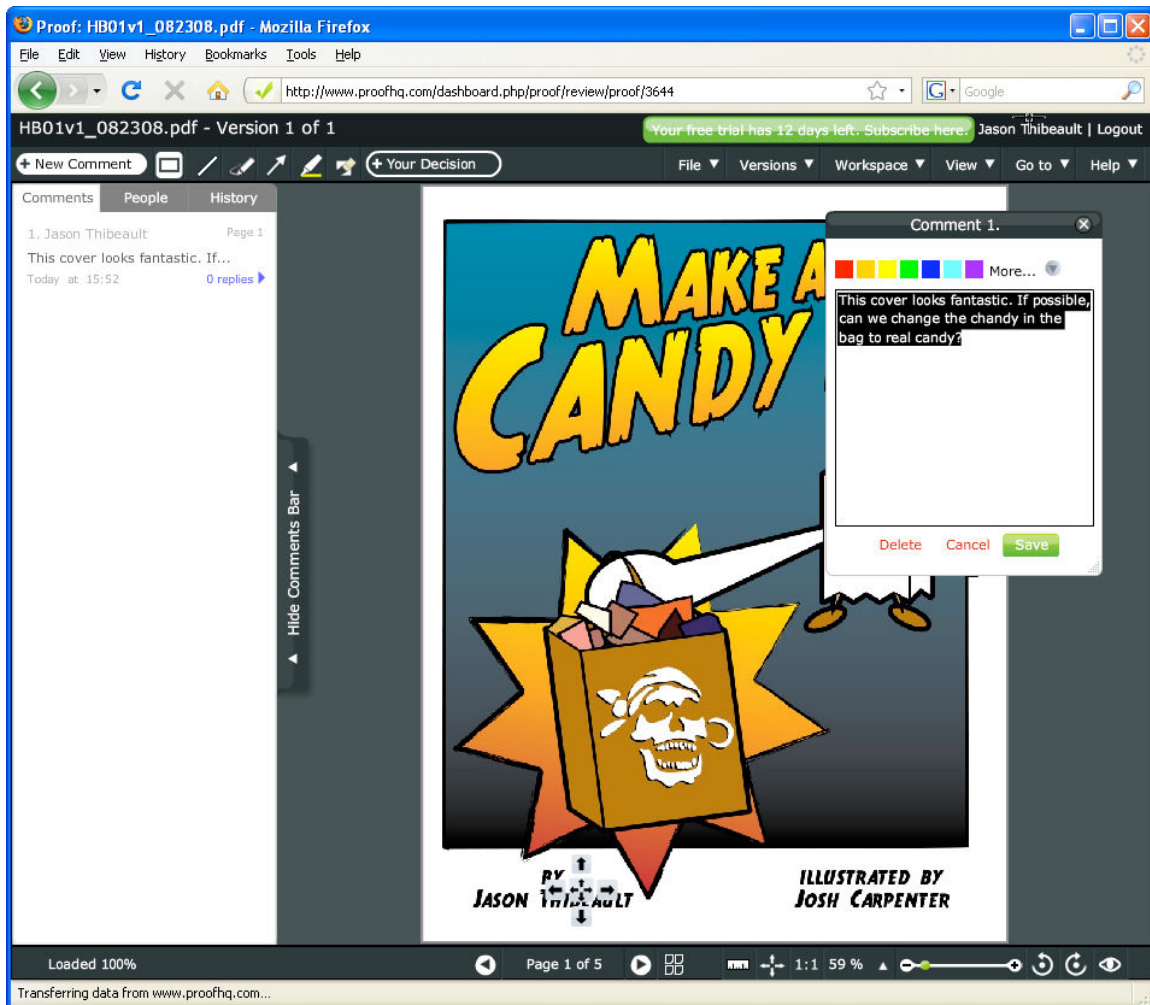


Figure 21: Existing Comment Opened

2. The **Comment window** will open and any mark-ups will be highlighted
3. Click **Save** to save your comment and mark-ups

Note: You can change mark-up mode, to append to the existing comment, by clicking on a different mark-up button.

Reply to a Comment

The Reply feature is one of ProofHQ's most powerful features and gives the ability for multiple reviewers to all comment together on a single proof.

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This feature allows all proof stakeholders to have an open dialogue regarding the proof.

To reply to a comment:

1. Open a comment (see above **Open an existing Comment**)

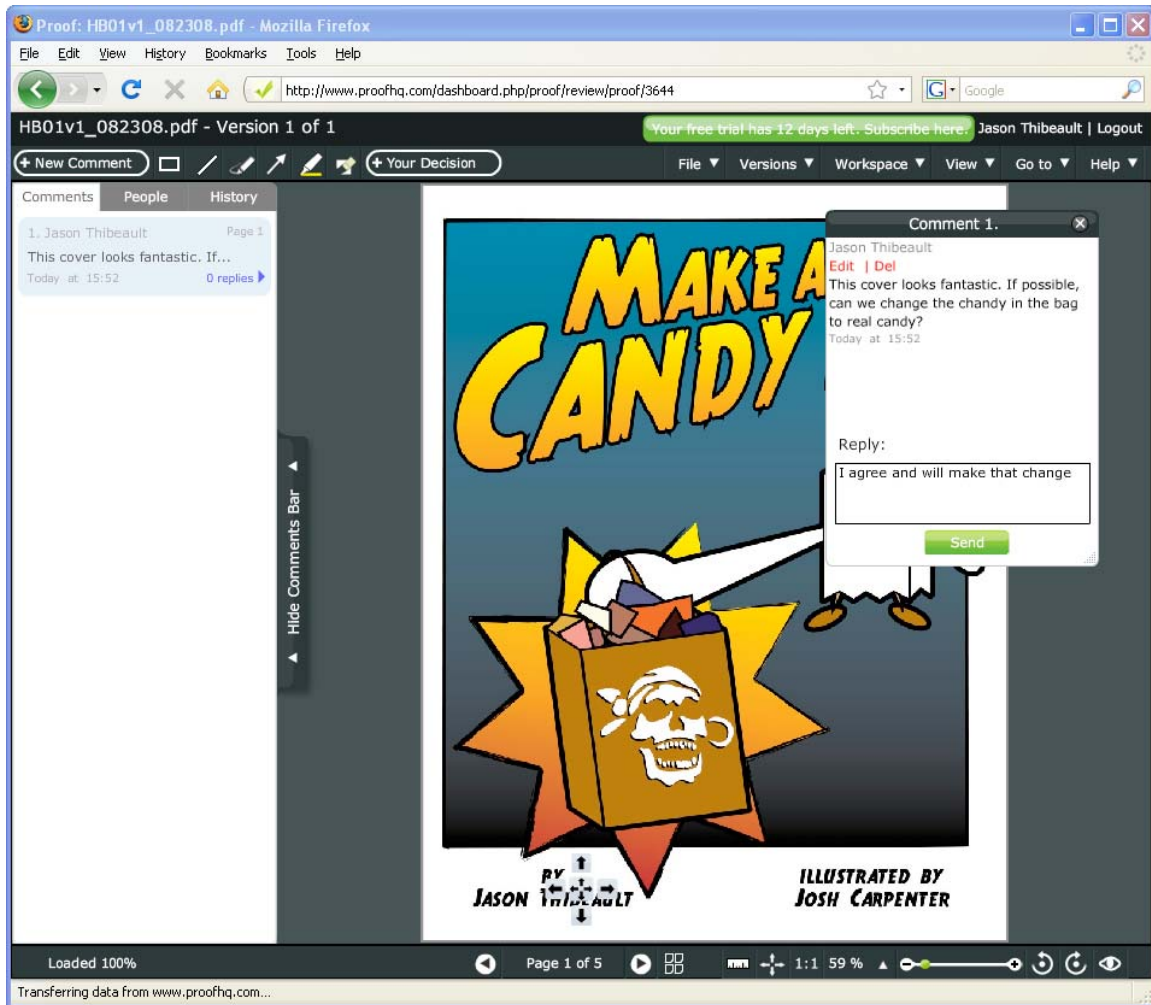


Figure 22: Reply to a Comment

2. Enter the text in the **Reply** box
3. and click the **Send** button to save your reply

Your Reply will be saved and will be visible to other reviewers almost immediately.

[screen shot]

Note: The current number of replies for a comment is noted next to the comment in the Comment Bar as a number. To see the replies, over the cursor over the comment to display a pop-up with all of the replies.

Edit a Comment

To edit a comment:

1. Open a comment (see above **Open an existing Comment**)

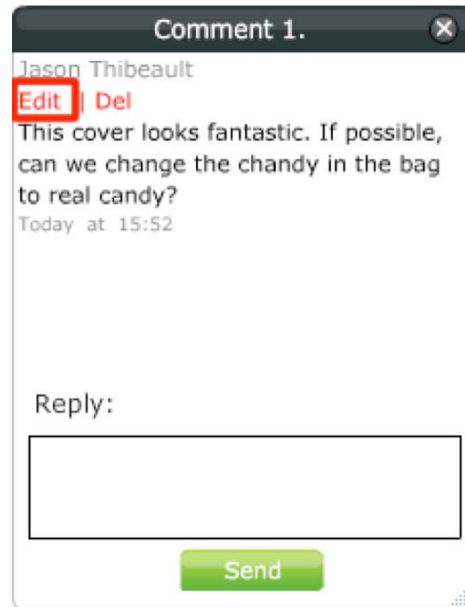


Figure 23: Edit a Comment

2. Click on the **Edit** button in the **Comment window**
3. The **Comment window** will open in edit mode
4. Start editing your comment in the **text area**
5. Edit or add one or more **mark-ups** to the proof
6. Click **Save** to save your comment and mark-ups

Note: you can only edit a comment that you have made and if no reply has been posted to it.

Delete a Comment

To delete a comment:

1. Open a comment (see above **Open an existing Comment**)

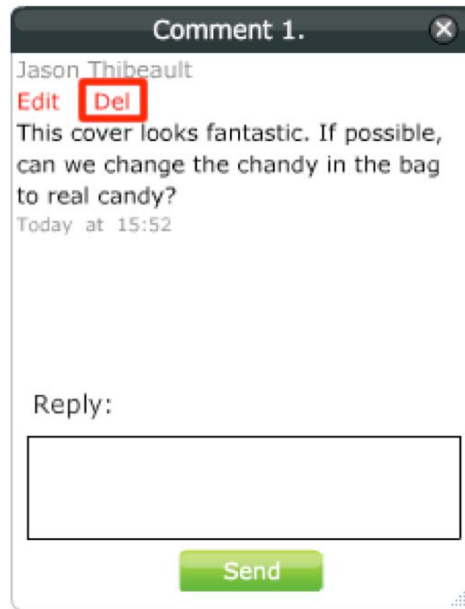


Figure 24: Delete a Comment

2. Click on the **Delete** button in the **Comment window**
3. The **Comment window** will be deleted together with any **mark-ups** related to it

Note: you can only delete comments you have made. Furthermore, you can only delete a comment if no reply has been posted to it.

Mark-ups

Mark-ups allow you to place drawings on pages of the proof to explain clearly what you are describing in your comments. There are several mark-up tools available in the proof, which include:

- Boxes
- Lines
- Arrows
- Text Highlighter
- Erasers

*Note: when you add a mark-up to the proof, it will automatically open the **New Comment window** for you to write a comment relating to the mark-up.*

New Mark-ups



Figure 25: Markup Tool Buttons

To add a new mark-up:

1. Click on one of the **Mark-up** buttons in the upper-left corner of the proof
2. The Box mark-up will be selected by default
3. Select a different mark-up tool if you wish
4. Add one or more **mark-ups** to the proof
5. At the same time the **New Comment window** will open in edit mode and you can typing a comment in the **text area**
6. Click **Save** to save your comment and mark-ups

*Note: You can change the color of the line before or after you have drawn it by selecting a color block from the **New Comment window**. You can also erase the line you have just drawn by holding down the **Shift Key** when in drawing mode (either freehand or straight line tool). This will turn the cursor into an eraser. To erase the line just click on any part of it with the eraser. The same action can be accomplished by clicking on the eraser icon in the Mark-up Tools section of the top menu bar.*

Mark-up settings

When you open the **New Comment window** by adding markup to a document, you can change a number of settings accessible by clicking on the **Mark-up Settings** arrow. Markup settings you can change include:

- **Opacity** – this is the opacity of the mark-ups that you are drawing
- **Line weight** – this is the thickness of the lines that you are drawing
- **Nib style**—click on the **Nib Style** button to select either a square nib to draw a square or a round nib to draw a circle
- **Freehand style**—click on the **Freehand Style** button to select either a closed shape or open for the free hand line

Mark-up Opacity

To modify the opacity of a mark-up's lines:

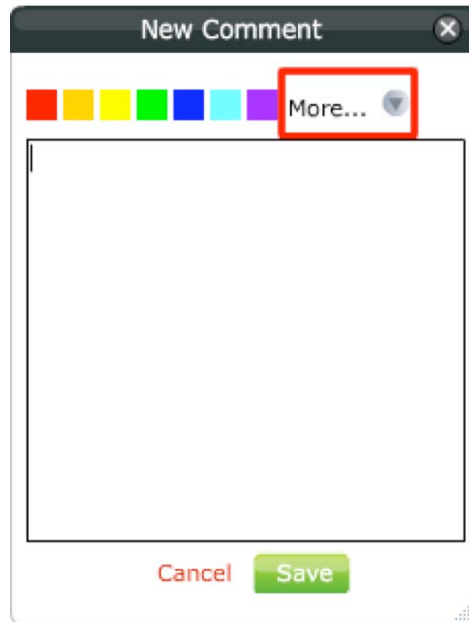


Figure 26: More Option on New Comment Window

1. Open a New Comment window

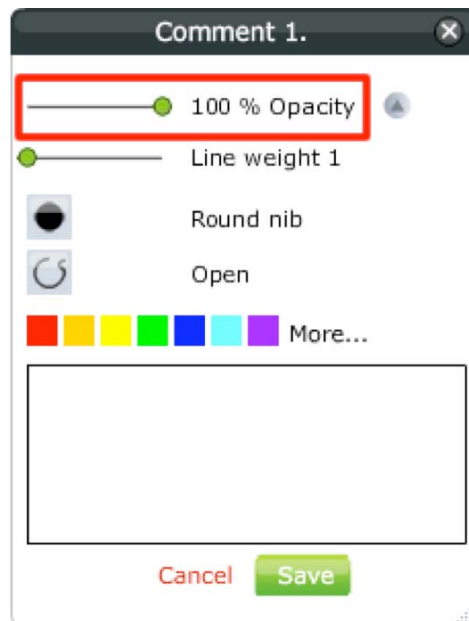


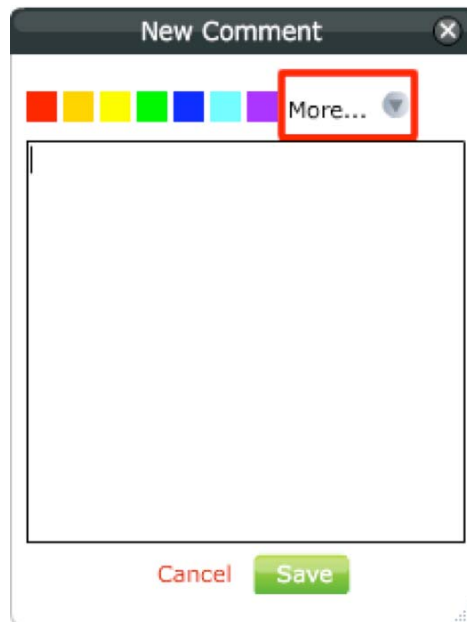
Figure 27: Markup Opacity Slider

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2. Click the **More** arrow in the **New Comment window** > This will display the additional tools
3. The opacity is modified by using the **Opacity** slider. To make the line more opaque (i.e., less transparent), move the slider to the right. You can have up to 100% opacity (meaning the line is solid). To make the line less opaque (i.e., more transparent), move the slider to the left.
4. Click **Save** to save your comment and mark-ups

Mark-up Weight (thickness)

To modify the weight (thickness) of a mark-up's lines:



1. Open a **New Comment window**



Figure 28: Markup Line Weight

2. Click the **More** arrow in the **New Comment window** > This will display the additional tools
3. The thickness of a mark-up is modified by using the **Line Weight** slider. To make the line thicker, move the slider to the right. To make the line thinner move the slider to the left
4. Click **Save** to save your comment and mark-ups