



Welcome!

REVIEWING PROOFS WITH THE
DIGITAL PROOFING TOOL



Advocacy | Tailored Insurance Solutions | Peace of Mind

Welcome to C&D's Digital Proofing Tool

Hello, it's your friendly neighborhood C&D team! We're excited to get you started using our digital proofing tool—powered by Workfront—to mark up and edit our communications. This tool will ensure we don't miss a single edit (no more combing through inboxes or tracking down files!) by giving everyone access to a single, cloud-based proof of the deliverable.

Review processes are more efficient with the digital proofing tool because multiple people can look at and comment on the proof at the same time. This means less time reviewing multiple drafts so you can get final communications out the door faster!

Reviewing and approving proofs with C&D's digital proofing tool is simple:

- Access your proof from a link sent directly via email.
- 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.
- If everything looks good, you can approve the proof—see page 7 for more information on the types of approval you can give.

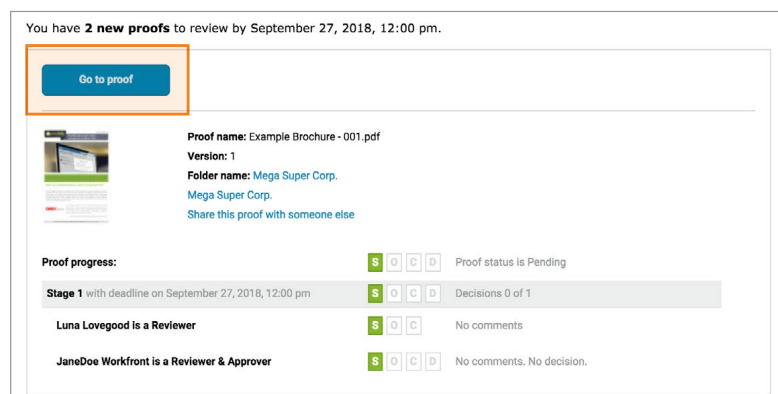
Receiving a Proof to Review

When someone needs you to review and/or approve a proof, you will receive an email notification.

Proof email notification

Click the blue **Go to proof** button in the email to open the proof into the proofing tool.

The proof will open into the web-based proofing tool.

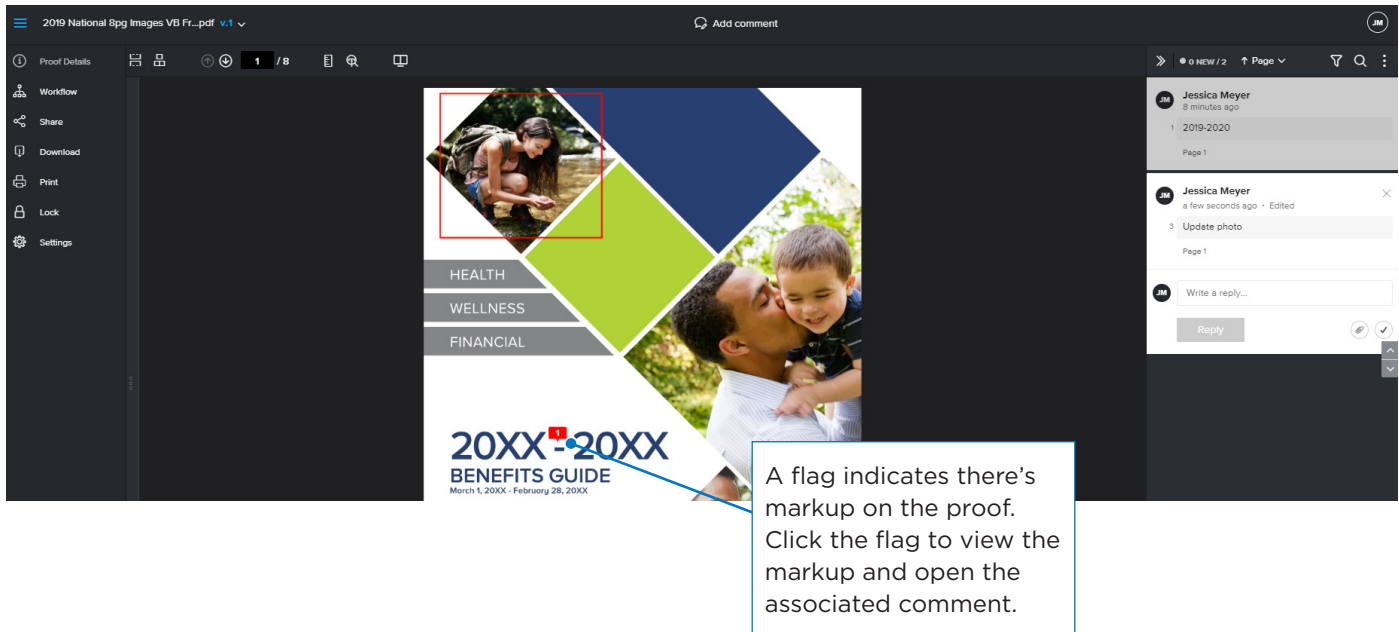


Overview of the Digital Proofing Tool



- 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** Compare versions of the proof.
- G** Add a comment and/or markup.
- H** Markup tools are available after clicking **Add comment**.
- I** If you're a proof approver, make your decision on the proof (approve, reject, etc.).
- J** Collapse comments column. Click **View comments** link to display the column again.
- K** Sort comments by latest, oldest, author A-Z, author Z-A, ascending page numbers or descending page numbers.
- L** Filter comments.
- M** Search the text of the proof (available for specific file types).
- N** Mark all comments as read.
- O** Make a comment, reply to a comment, attach a file to a comment, etc.
- P** Zoom in/out on the proof.
- Q** Move the proof around within the window.
- R** Change zoom percentage of the proof.
- S** Rotate the proof.
- T** Options for fitting proof within the proofing tool window.

Adding Comments



Making markups and comments

1. Click **Add comment** at the top of the proofing tool window.
2. A **comment box** opens on the right side of the viewer.
3. Enter your text for the comment, whether it be instructions on how to change a layout or text to swap out.
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.

Editing 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 and Text Annotation Tools

Use the markup and text annotation tools to point to an area of the proof to help clarify your comment. The tools are available in the toolbar at the top of the proofing tool, after you've clicked **Add comment**.

Markup tools

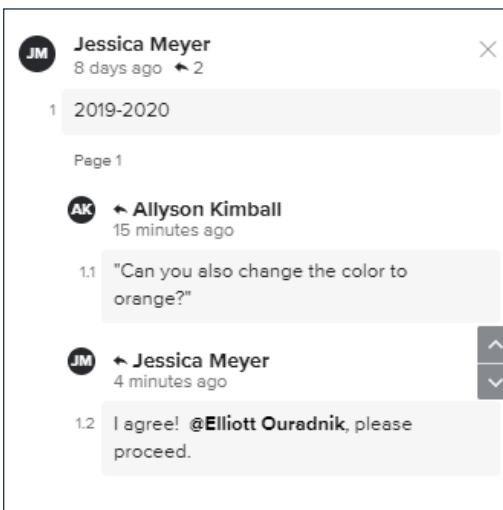
Click **Add comment** to access the tools. Delete a markup by clicking the **X** in the black circle at the upper-right corner of the markup.



- A** Text — Highlight text on the proof. Available only on certain types of static proofs.
 - » The annotation tools appear after you've highlighted text: highlight, delete, replace, insert, bold, italics, underline.
- B** Freehand line — Draw freehand 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. You can add or delete points. Helpful when trying to highlight odd shapes on a proof.
- H** For each of the tools, you can change the color of the highlight or drawing. For the drawing tools (line, arrow, box, etc.), you also can select the opacity of the line and the thickness of the line. Select the tool, then select the color options before you start drawing.

Replying to Comments

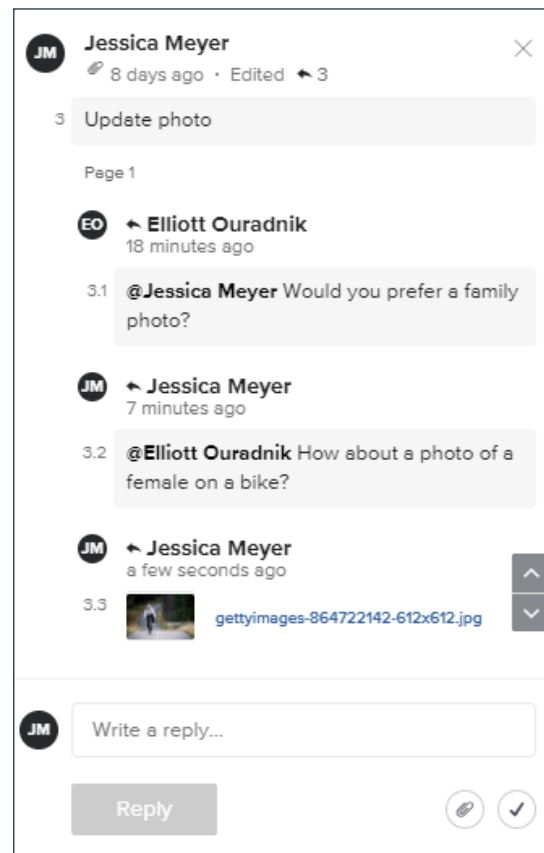
Replying to comments on a proof keeps the conversation about the proof all in one place. If you have replacement images, reference documents or other files that are relevant to the review, you can attach them to a comment. Others will be able to download them and save the files to their computers.



Reply to a comment

1. Click a comment in the comment list to expand it. Or click on a markup pin on the proof to expand the associated comment.
2. Type your reply next to your initials at the bottom of the comment.
3. Click the **Reply** button to save your response.

Each response is timestamped when it's saved so you can see when the response was posted.



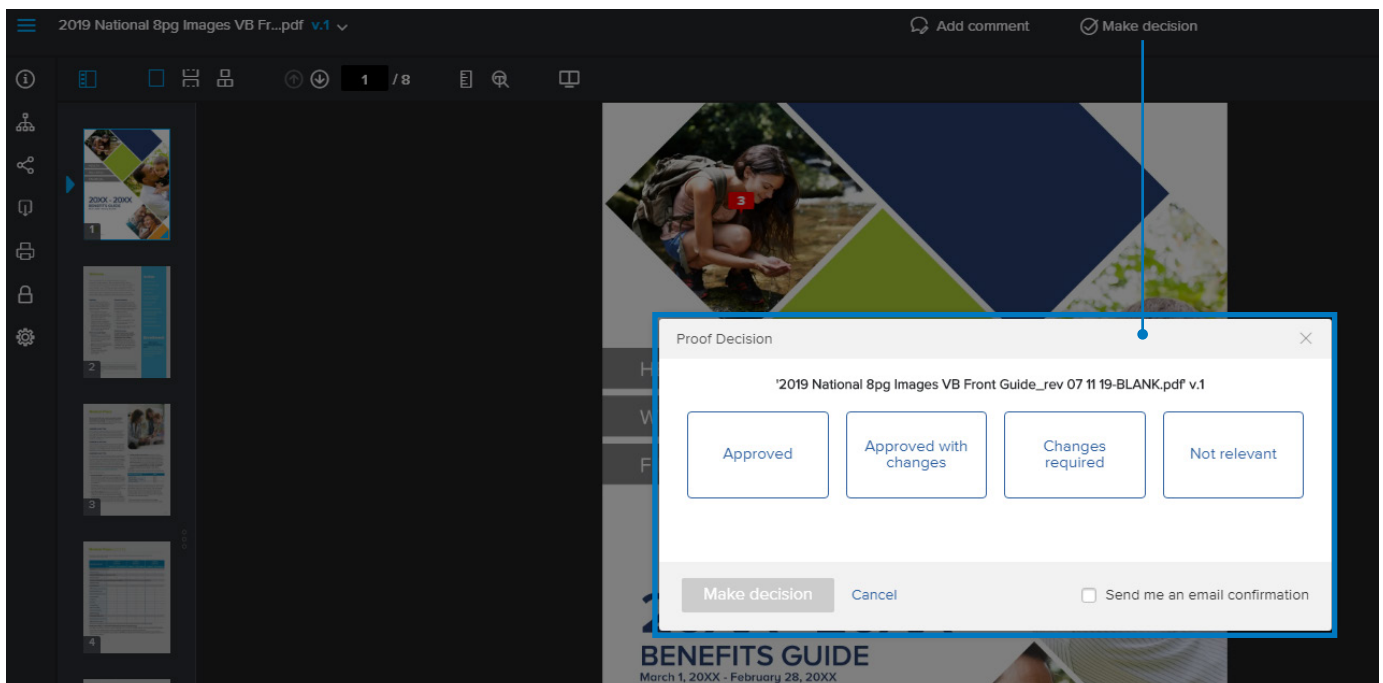
Attach a file

1. Expand the comment, so you can see the response area.
2. Click the attachment icon (the paperclip).
3. Navigate to and select the desired file from your hard drive or other source. Click **Open**.
4. Click **Reply** on the comment to complete the upload. The file attaches to the comment.

To download an attached file, click the link in the comment and then select the **Download** button.

Make a Decision on a Proof

Once you're finished making your edits, it's time to make a decision on the proof! What kind of decision you make will depend on the next step in the timeline. You may have no edits at all and are ready to approve the deliverable, or have some edits and want to see a new draft before signing off.



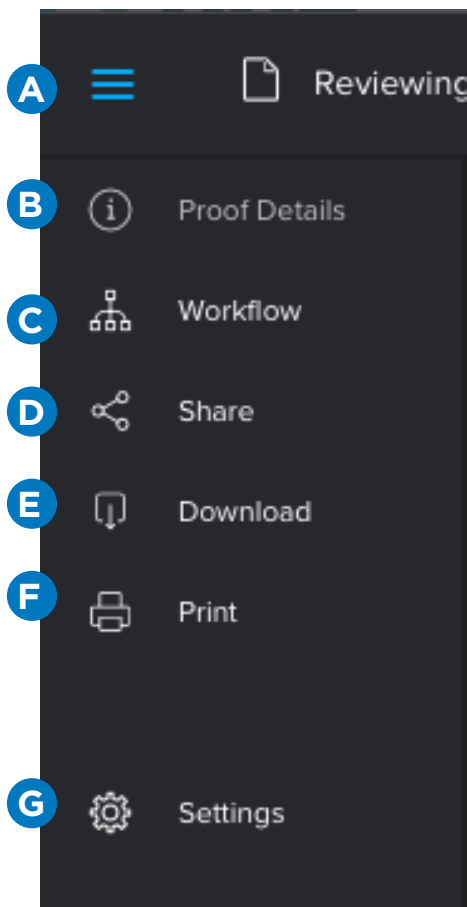
Proof decision

1. Click **Make decision** at the top of the proofing tool.
2. Pick the desired option and click **Make decision**. (Your decision options may vary from the default Workfront options.)
 - **Approved:** You approve the proof. It is ready for publication, release to employees, 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.

Note: If you don't see the **Make decision** option at the top of the page, this means the proof manager doesn't need you to make a decision on the proof.

Additional Tools in the Viewer

The menu panel on the left side of the proofing tool offers additional tools you might need when working with your proofs. Click the menu icon in the upper-left corner to access the tools.



- A** Click to expand or collapse the menu panel.
- B** 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.
- C** The workflow panel shows the overall proof status, as determined by the decisions and actions made on the proof by all reviewers in every stage of review. You can also see the actions taken by each reviewer.
- D** Copy a shareable link to the proof, grab the proof's embed code or add individual users to the proof. You must have certain permissions to be able to add users to the proofing workflow and set their proof role, email alerts and deadline.
- E** Click to download a copy of the original file the proof was generated from. This does not download comments or other information associated with the proof.
- F** Print a summary of the proof comments in a spreadsheet or PDF. You can also print thumbnails of the proof, if desired.
- G** Establish your personal proofing tool settings, such as showing the markup pins on the proof.