

Virtual User Group: Creative Agencies & Marketing: Workfront Proof

Tuesday, April 13, 2021

Today's Host



Lauren Quincey

Principal Customer Success Manager
Adobe

Agenda

- 11:00 a.m. Welcome and Agenda (5 min)
- 11:05 a.m. **Customer Spotlight: KERN Agency (20 min)**
*Carol Majewski, Associate Director of Workflow and
Lorraine Pomar, Workflow Architect*
- 11:25 a.m. Small Group Discussion (20 min)
- 11:45 a.m. **Customer Spotlight: Javelin Agency (20 min)**
Andrea Pikulinski, Sr. Director, Project Management
- 12:05 p.m. Large Group Discussion (20 min)
- 12:25 p.m. Wrap-up Next Steps (5 min)
- 12:30 p.m. Event Ends



Speaker



Carol Majewski

Associate Director of Workflow
KERN Agency



Lorraine Pomar

Workflow Architect
KERN Agency



WORKING IN PROOFHQ

April 2021

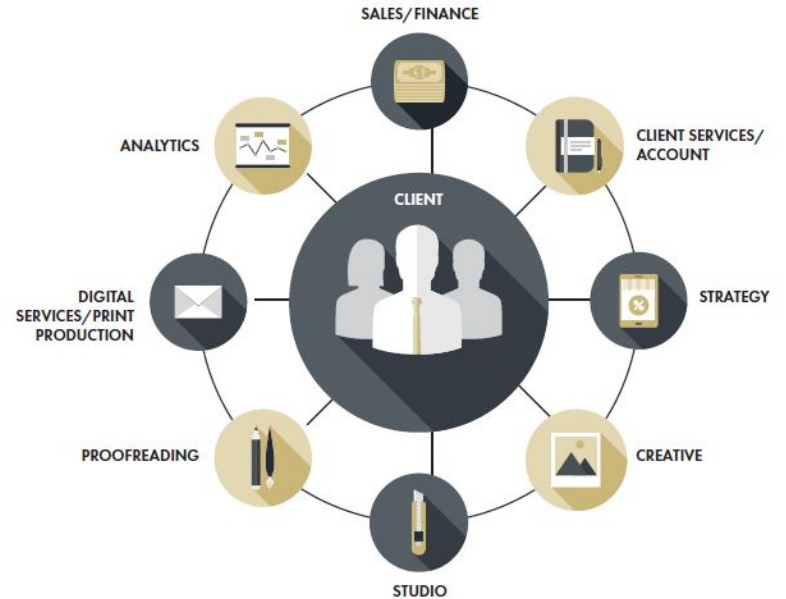
AGENCY WORKFLOW

Two-pronged approach:

1. Standardize processes
2. Collaborate via technology

WORKFLOW

EVERYONE HAS A ROLE.



NAVIGATING THE COVID-19 CLIMATE

- Technology & tools
 - Workfront
 - ProofHQ
- Positioned us for digital transformation
- Drove momentum with resistors
 - Forced to adapt to change





**TAKE THE BEST OF BOTH
WORLDS AND UNIFY TO BEST
SERVE OUR CLIENTS**



KERN



Javelin





Carol Majewski

WORKFLOW ASSOCIATE DIRECTOR



Lorraine Pomar

AGENCY WORKFLOW ARCHITECT



Andrea Pikulinski

SENIOR DIRECTOR OF PROJECT MANAGEMENT

**ONCE UPON A
TIME...**





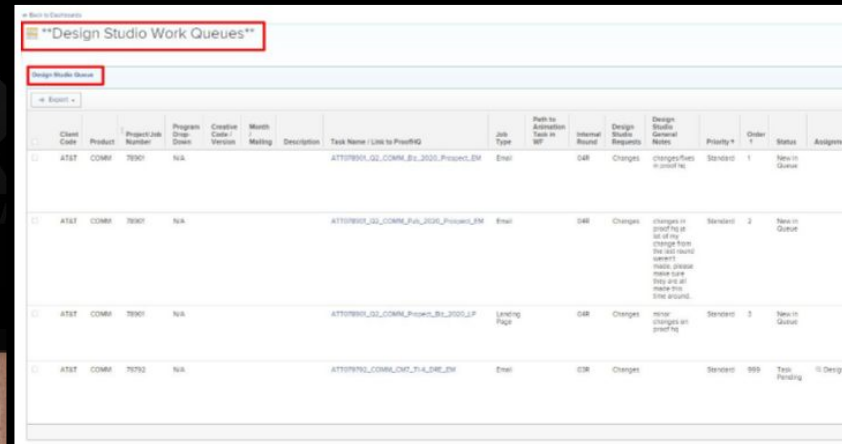
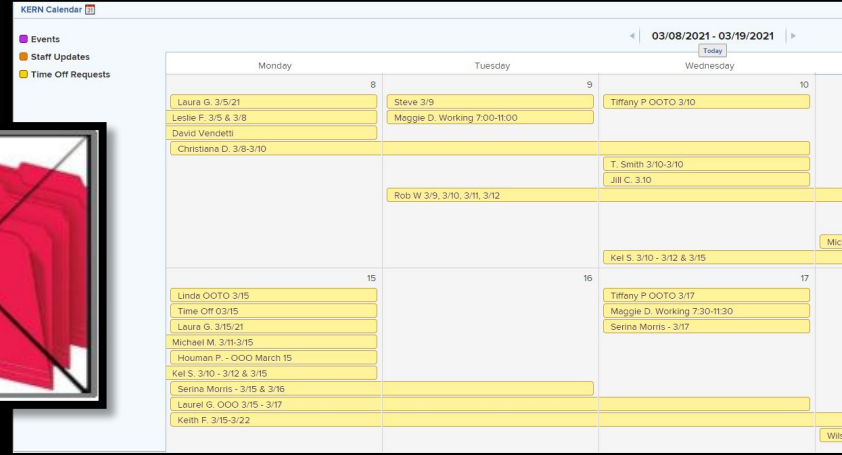
• **ProofHQ– 8 Years**

- Markups
- Change Management & Round Tracking
- Communication
- Collaboration - **Shared resources/All agency access**



• **Workfront – 2 Years**

- Project/Task Management
- KERN Home Portal
- Department Team Work Queues
- Request Queues
 - Asset Purchase Requests
- Central Work Repository



Agency Workflow Portfolio - Onboarding

SAMPLE PROJECT

Project Owner
Carol Majewski
Workflow Associate Director

Tasks Project Details Updates **Documents (10)** Requests Staffing More

+ New Task - Export

#	Task Name	Assignments	Predecessors	Task Constraint	Duration	Planned Start Date	Planned End Date	Standard	New in Planning	0%
1	Internal Round XR	WSA		As Soon As Possible	16 Days	6/24/20 8:30 AM	7/16/20 5:30 PM	Standard	New in Planning	0%
2	Studio Implement Changes	Studio Team		As Soon As Possible	16 Days	6/24/20 8:30 AM	7/16/20 5:30 PM	Standard	New in Queue	0%
3	Proofreading Review	Proofreading Team		As Soon As Possible	0 Days	6/24/20 8:30 AM	6/24/20 8:30 AM	Standard	New in Planning	0%
4	Account Reviews Proofreading Feedback	Account		As Soon As Possible	0 Days	6/24/20 8:30 AM	6/24/20 8:30 AM	Standard	New in Planning	0%
5	Studio Implement Proofreading Changes	Studio Team		As Soon As Possible	0 Days	6/24/20 8:30 AM	6/24/20 8:30 AM	Standard	New in Planning	0%

Project Manager creates project within their portfolio from a template.

SAMPLE PROJECT

Project Owner
Carol Majewski
Workflow Associate Director

Tasks Project Details Updates **Documents (1)** Requests Staffing More

Add new Download selected Share Delete Edit More

Folders PROJECT FOLDERS(1)

- PROJECT FOLDERS
 - Art Release
 - Assets-New Images
 - Copy Deck
 - File Prep

Art Release
Contains 0 Items

Assets-New Images
Contains 0 Items

Copy Deck
Contains 0 Items

File Prep
Contains 0 Items

Job Pickup_1R.pdf
Added Just now by Lorraine Pomar - Comment
Document Details **Generate Proof**

There are folders automatically created when spinning up a project to help organize the Documents tab.

Client Services uploads a job pickup or creative reference and clicks Generate Proof.

When a task is routed to Creative or Studio, they navigate to the Documents tab and click Open Proof to review the comments and implement the changes in the native file (e.g., InDesign or Photoshop).

Job Pickup.pdf
Added Just now by Lorraine Pomar - Comment
Document Details • Proof Details • Print Summary • **Open Proof**

Job Pickup_1R.pdf
Added Just now by Lorraine Pomar - Comment
Document Details • **Generate Proof**

Client Services uploads job pickup or reference to the black bar of Documents tab, clicks Generate Proof, and clicks Open Proof to open in ProofHQ interface.

The screenshot shows the 'SAMPLE PROJECT' interface. The 'Documents' tab is active, displaying a 'Drag & Drop documents here' area with a PDF icon and a '+ Create' button. Below this, a list of folders is visible: Art Release, Assets-New Images, Copy Deck, and File Prep. A red arrow points to the 'Generate Proof' button in the 'REQUEST FOLDERS' section.

This close-up shows the 'REQUEST FOLDERS' section for 'Job Pickup.pdf'. The 'Open Proof' button is highlighted with a red box and a red arrow pointing to it.

Creative or Studio drops the new-round PDF to the blue bar on top of the original document to upload a new version and clicks Generate Proof.

The screenshot shows the 'Documents' tab interface. A 'Drag & Drop documents here' area is visible at the top. Below it, a list of folders is shown: Art Release, Assets-New Images, Copy Deck, and File Prep. A new document, 'Job Pickup_1R.pdf', is being uploaded to the top of the original document. A red arrow points to the 'Generate Proof' button in the 'REQUEST FOLDERS' section.

This close-up shows the 'REQUEST FOLDERS' section for 'Job Pickup_1R.pdf'. The 'Generate Proof' button is highlighted with a red box and a red arrow pointing to it.

- NO PROOFHQ WORKFLOWS
- NO PROOFHQ APPROVALS
- DOCUMENT APPROVAL

The screenshot shows a document management interface. On the left, there are folders: Art Release, Assets-New Images, Copy Deck, and File Prep. The main area displays a document titled 'Job Pickup.jpg' with a thumbnail of two dogs. Below the thumbnail, there is a red box around the 'Open Proof' button. To the right, there is a 'Proofing' section with an 'Approvals' tab highlighted in a red box. A red arrow points from the 'Approvals' tab to the 'Open Proof' button.

Logged in User- Pending Document Approvals

Export

Document Name	Project Name	Requested By	Approver	Request Date
KERN123456_DM_4FP	Sample Project #1	Lorraine Pomar	Carol Majewski	3/2/21
KERN123456_DM_1R	Sample Project #1	Carol Majewski	Carol Majewski	2/10/21
KERN123456_DM_1R	Sample Project #2			2/9/21

The screenshot shows a document approval interface for 'Job Pickup.pdf'. It includes tabs for 'Updates', 'Approvals', 'All Versions', and 'Custom Forms'. Under the 'Approvals' tab, there is a section 'Get Approval From:' with a user profile for 'Carol Majewski' and a 'Pending' status highlighted in a red box.


Status	Assignments	Project Owner	Proj Last Note
With AD for Review	[User]	[User]	waiting on final colors and fonts
With AD for Review	Studio Team	[User]	Approved
With AD for Review	Studio Team	[User]	Approved

- EMAIL ALERTS SET TO DISABLED


- SET PROOFHQ PROOF ROLE: REVIEWER

- SET WORKFRONT PROOFHQ PERMISSION PROFILE: SUPERVISOR

▼ Default email alert settings

Default email alert	Disabled	
Default email alert for new guest reviewers	Disabled	
Email confirmation when proofs are ready	<input type="checkbox"/> Send me email	
Format of emails sent to me	HTML styled emails	
Email Late proof notification	<input type="checkbox"/> Enable	
Email At risk notification	<input type="checkbox"/> Enable	

▼ Default proof settings

Default proof role	Reviewer	
Locking	<input type="checkbox"/> Lock the proof when all decisions are made	
Secure proofing	<input type="checkbox"/> Login required. The proof can only be shared with other users	
Decisions	<input type="checkbox"/> Only one decision required	
Allow	<input checked="" type="checkbox"/> Download of original file <input checked="" type="checkbox"/> Public sharing. The proof can be shared via a public URL or embedded code <input type="checkbox"/> Subscription. People can sign up for the proof via the public URL or embed code <small>Subscriber must click a link in an email to access a proof: Proof notification email only</small>	

Reviewer

- ✓ Can view a proof
- ✓ Can add markups
- ✓ Can add comments
- ✓ Can edit own comments if there are no replies
- ✗ Cannot make a decision
- ✗ Cannot edit or delete comments made by others
- ✗ Does not have edit rights on the proof

Personal Info Is Active

Preferences

Access Level
Planner

Notifications

Access

Layout Template
Planner Layout Template

Organization


Resource Planning

Proof Permission Profile
Supervisor

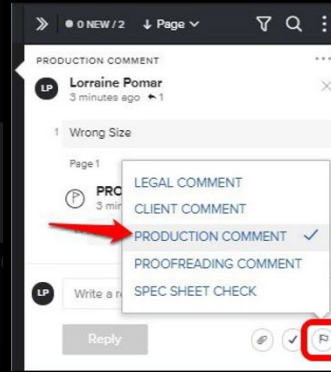
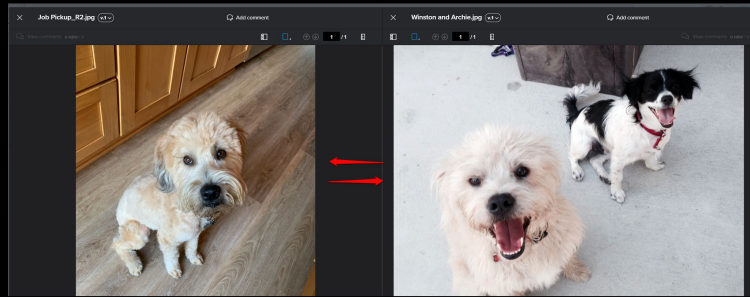
Custom Forms

Comment

Organization

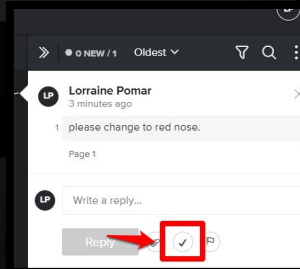
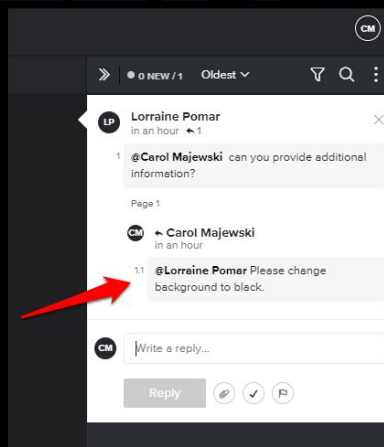


CHANGE
MANAGEMENT
FOR INTERNAL
ROUNDS

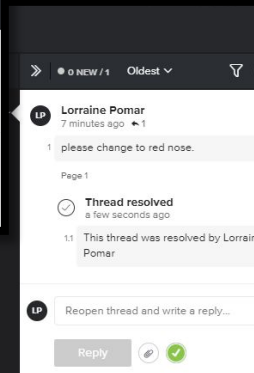


ACTION FLAGS

@MENTIONS

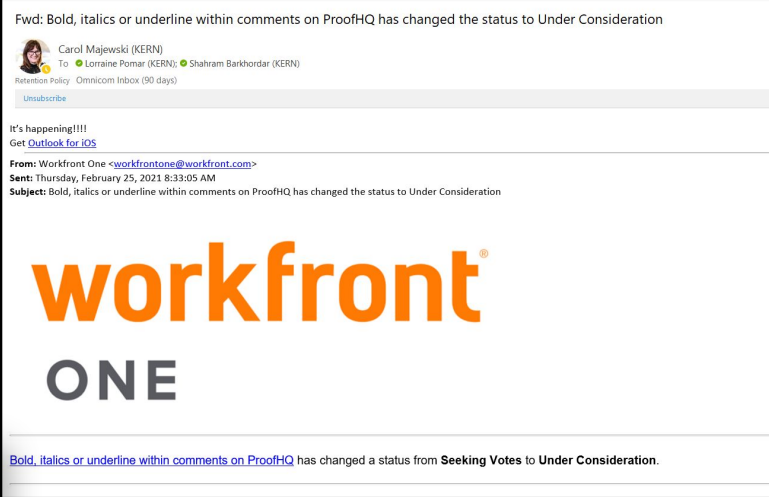
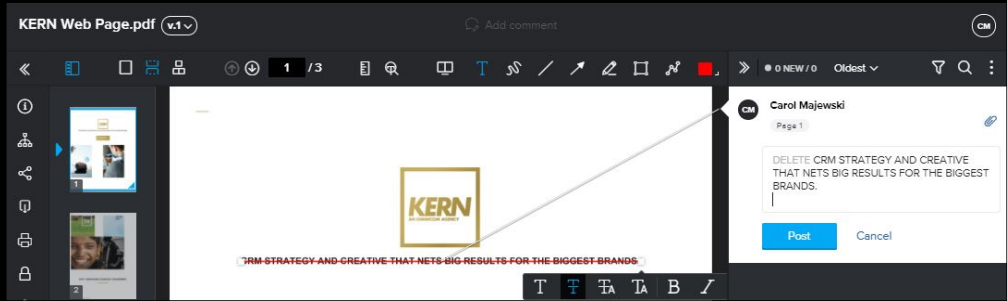
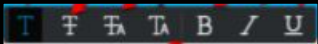


THREAD
RESOLVE



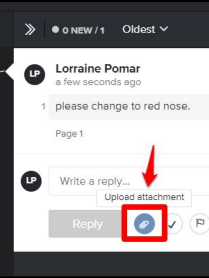
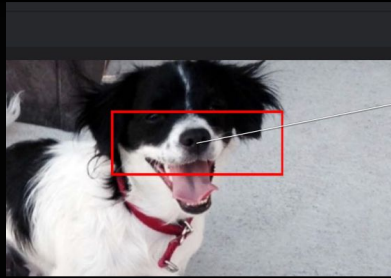
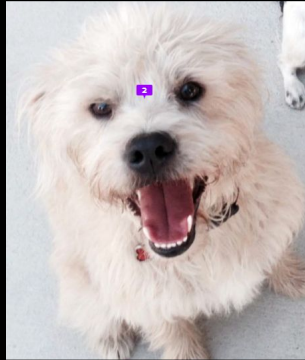
AN OMNICOM AGENCY

TEXT TOOLS

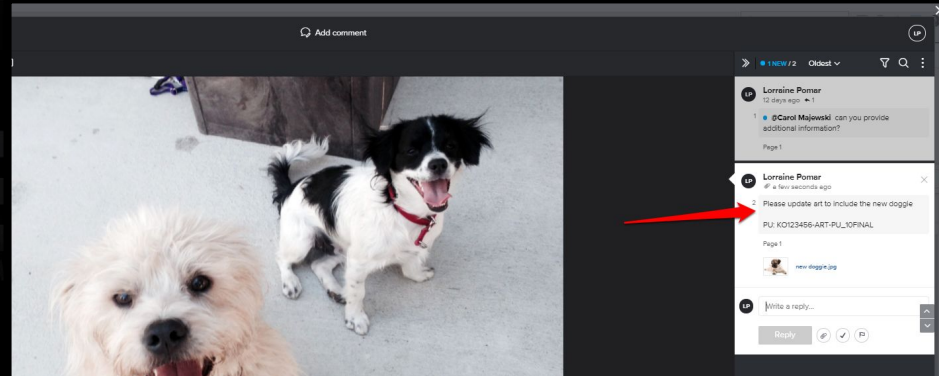
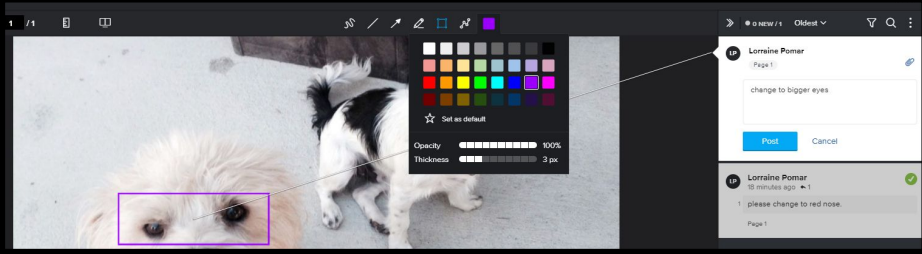


Bold, italics or underline within comments on ProofHQ

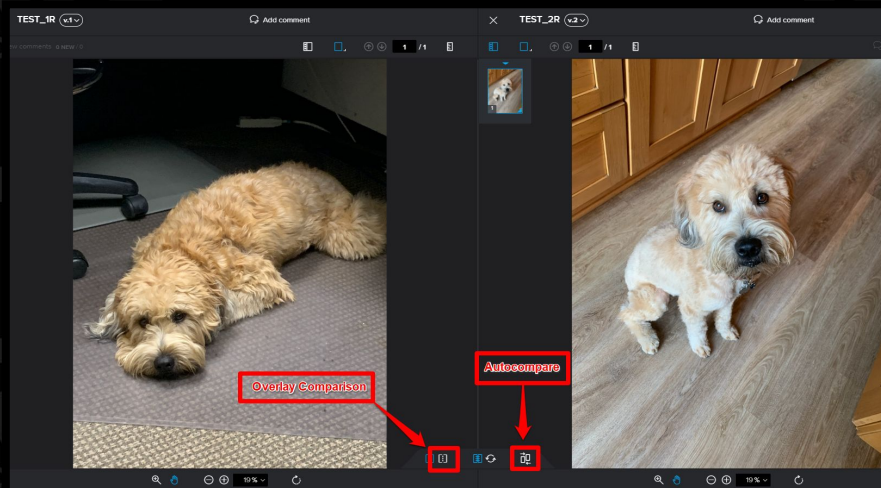
COMMENT
COLOR



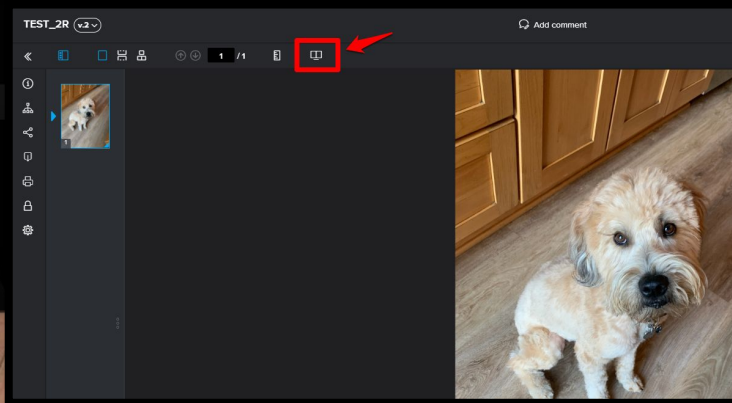
UPLOADING
ATTACHMENTS
FOR
REFERENCE



OVERLAY

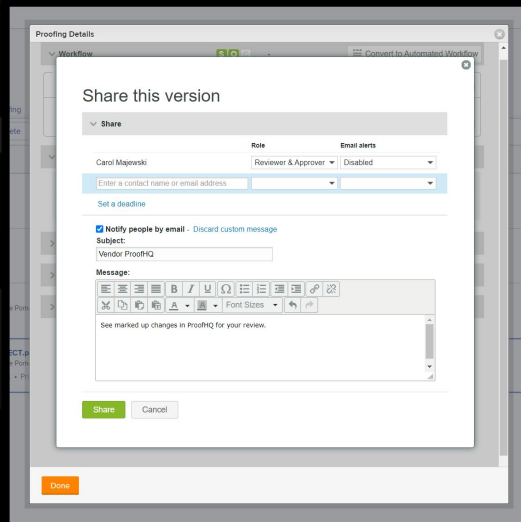
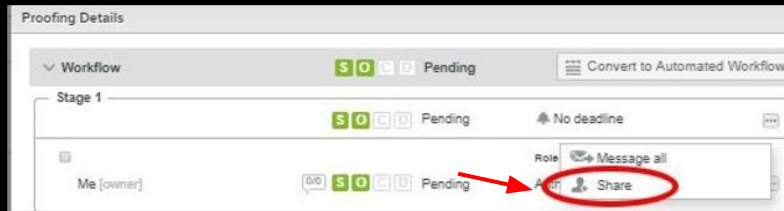


AUTO COMPARE

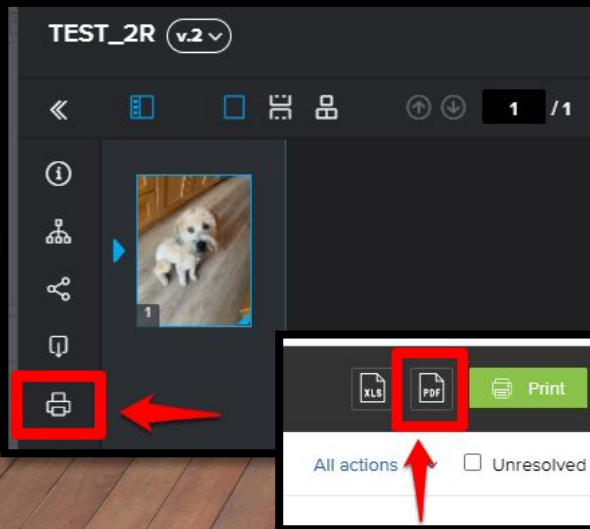


COMPARE PROOFS

DOWNLOAD
PROOF WITH
COMMENTS AS
A PDF



SHARE
PROOFS WITH
PRINT
VENDORS





THANK YOU



KERNAGENCY

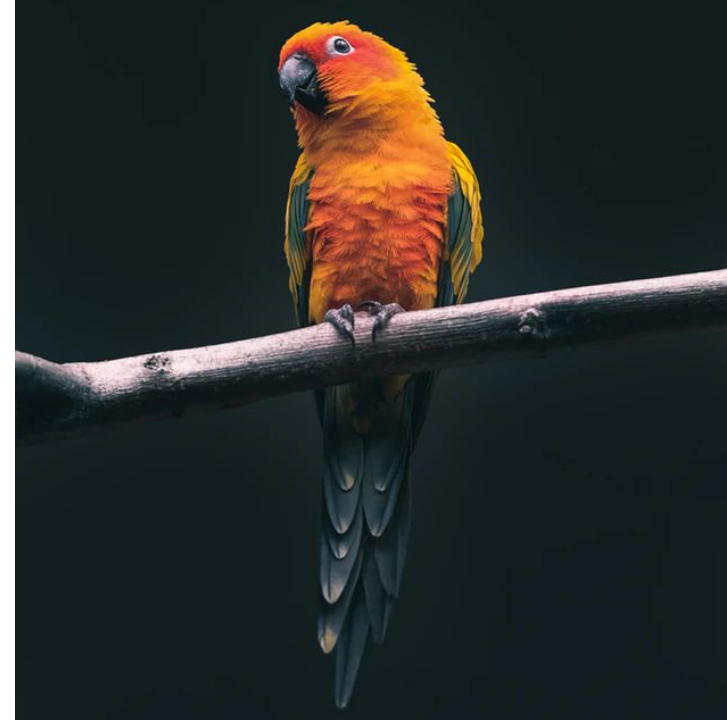


KERNAGENCY.COM

“Birds of a Feather” Group Discussions

Go around the room and share:

- How does Proof fit into the process / workflow within your organization?
- What’s working well, what do you think be better?



Speaker



Andrea Pikulinski

Sr. Director, Project Management
Javelin Agency



Workfront Proof HQ User Group – External Review

April 13, 2021

- Javelin is a CRM agency within the Omnicom Network
- KERN and Javelin have similar expertise and clients, making a consolidation a smart new approach.
- Working Admin with Project Managers influencing process and Workfront functionality – iterative workflow as client work evolves.

The logo for Javelin, featuring the word "Javelin" in a bold, black, sans-serif font. The letters are slightly shadowed, giving the logo a three-dimensional appearance as if it is floating above a white surface.

Javelin onboarded Workfront in May 2018

Workfront Feature use:

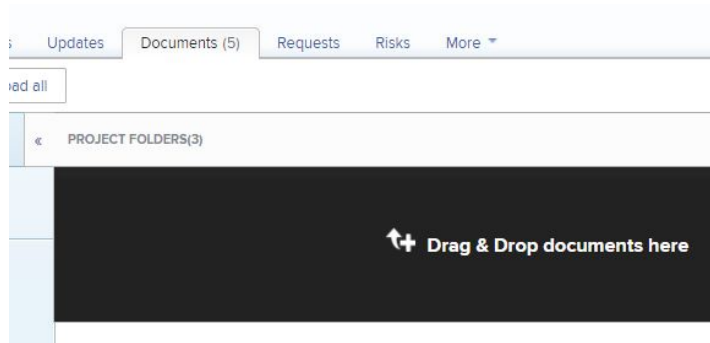
- Project timelines and task management
- Resource monitoring
- Project communications and tracking
- Box file repository & link posting for working assets
- PHQ for client reviews & feedback management

The logo for Javelin, featuring the word "Javelin" in a bold, black, sans-serif font. The letter "J" is significantly larger and more prominent than the other letters, which are of uniform size and weight.

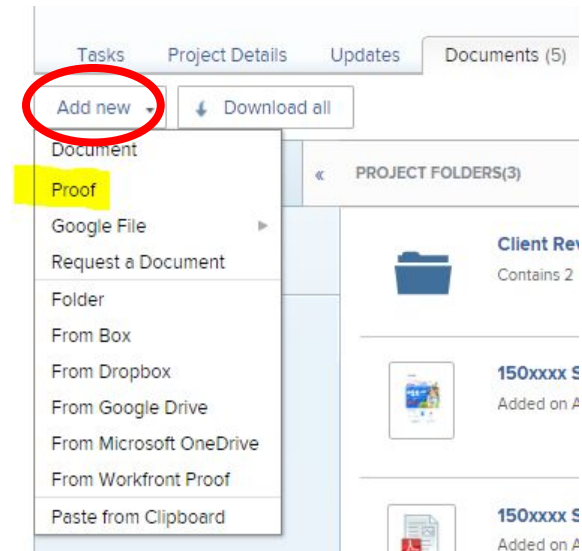
Preparing a Document for Proofing

- Under the DOCUMENT tab, there are multiple ways to prepare a Proof

Drag and Drop

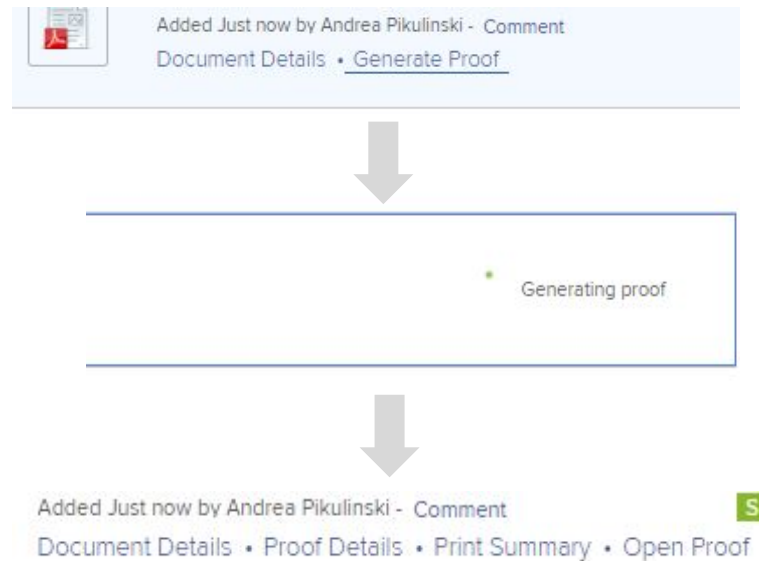


ADD NEW button



Preparing a Document for Proofing – Drag & Drop

- After dropping in the document, Generate a Proof then open it to activate proofing functionality



Preparing a Document for Proofing – “Add New” button

- Window opens to allow adding:
 - document to be proofed,
 - reviewers & roles,
 - deadlines and
 - custom message when proof is shared

The screenshot shows the Javelin web application interface for creating a new proof. The header includes the Javelin logo and navigation links: Home, Projects, Reporting, People, Requests, Timesheet, and a Setup button. The main content area is titled "New proof" and shows a "Test Project" breadcrumb. Under "Add files", there is a blue box with a document icon and the text "Drag & drop files here or [browse](#)", and a green box with a link icon and a text input field containing "www.shareyourlink.com". Below this, it says "0 files (0 proofs)" and "You haven't added any files yet".

Single proof

Combine all compatible files into single proof

Workflow

Workflow type

Basic Automated

* Recipient name or email address	Proof role	Email alerts
Andrea Pikulinski Owner	Reviewer	Daily summary

Type contact name or email address to add a recipient

Set proof deadline

Transfer primary decision rights to

Select primary decision maker

Require only one decision for this stage

Email notification

Notify recipients about this proof

Add custom message

Proof settings

Require login. This proof cannot be shared with guest users

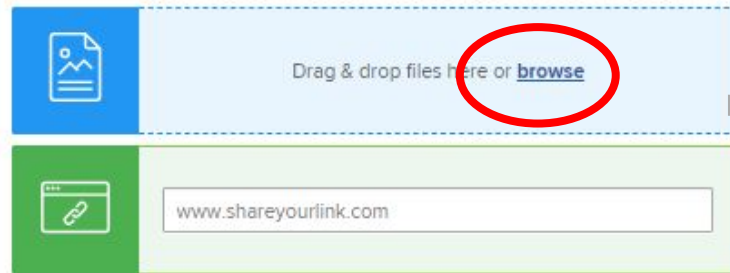
Require decisions to be electronically signed

Lock proof when all required decisions are made

“Add New”– Loading the Document to be Proofed

- Browse to the file to load
- Once added, all proofs added appear at bottom.

Add files



1 file (1 proof)

Delete all

150xxxx Sample Email v.1 (1).pdf
150xxxx Sample Email v.1 (1).pdf

“Add New”– Adding Reviewer contact information

- Populate Proof recipient's names or email addresses
- New email addresses can be added
- Previous email addresses are stored for future use
- Multiple recipients can be added

Single proof

Combine all compatible files into single proof

Workflow

Workflow type

Basic Automated

* Recipient name or email address	Proof role	Email alerts
 Andrea Pikulinski Owner v	Reviewer v	Daily summary v

Type contact name or email address to add a recipient

Set proof deadline

Transfer primary decision rights to:

Select primary decision maker

Require only one decision for this stage ⓘ

Workflow

Workflow type

Basic Automated

* Recipient name or email address	Proof role	Email alerts
 Andrea Pikulinski Owner v	Reviewer v	Daily summary v

sarah

Sarah Kleinwechter (skleinwechter+107172@javelinagency.com)




Sarah Moore (smoore@javelinagency.com)

Sarah Kleinwechter (skleinwechter@javelinagency.com)

Transfer primary decision rights to:

Select primary decision maker

“Add New” – Review Roles & Alerts

* Recipient name or email address	Proof role	Email alerts
 Andrea Pikulinski <small>Owner</small>	Reviewer	Daily summary
 Sarah Kleinwechter	Reviewer & Approver	Replies to my con
 Carol Majewski	Reviewer	Disabled

Type contact name or email address to add a recipient

Set proof deadline

Transfer primary decision rights to

Select primary decision maker

Require only one decision for this stage ⓘ

Read only
Reviewer
 Approver
 Reviewer & Approver
 Author
 Moderator

This person can also:
 Resolve comments and apply actions
 Share proof by tagging

- Proof roles are set by recipient to allow different levels of review
- Email alerts allow customizing of frequency & level of detail for each recipient

Email alerts

Daily summary

Replies to my comments

Disabled

All activity
 Replies to my comments
 Decisions
 Final decision
 Hourly summary
 Daily summary
Disabled

“Add New”– Custom Review Message

- Make sure to have an engaging Subject line with due date included
- In body of Message, include timeline and any other critical review element.
- Use formatting toolbar at bottom to enhance message

Email notification

Notify recipients about this proof

Add custom message

Subject

Subject

Message



Formatting toolbar: B, I, U, Color, 14 pt, Bulleted list, Numbered list, Indent, Link

Subject

NEED REVIEW - New campaign creative - due today

Message

Good morning Team-

Please see link below for the NEW CAMPAIGN. Please provide feedback by today or we will fall behind schedule. If there is no feedback we will sent to legal for review.


- Schedule:R1 to Team - 3/3
- R1 feedback due - 3/5
- R2 to Legal - 3/8
- R2 feedback due - 3/11

Formatting toolbar: B, I, U, Color, 14 pt, Bulleted list, Numbered list, Indent, Link

Sharing from within the ProofHQ Window

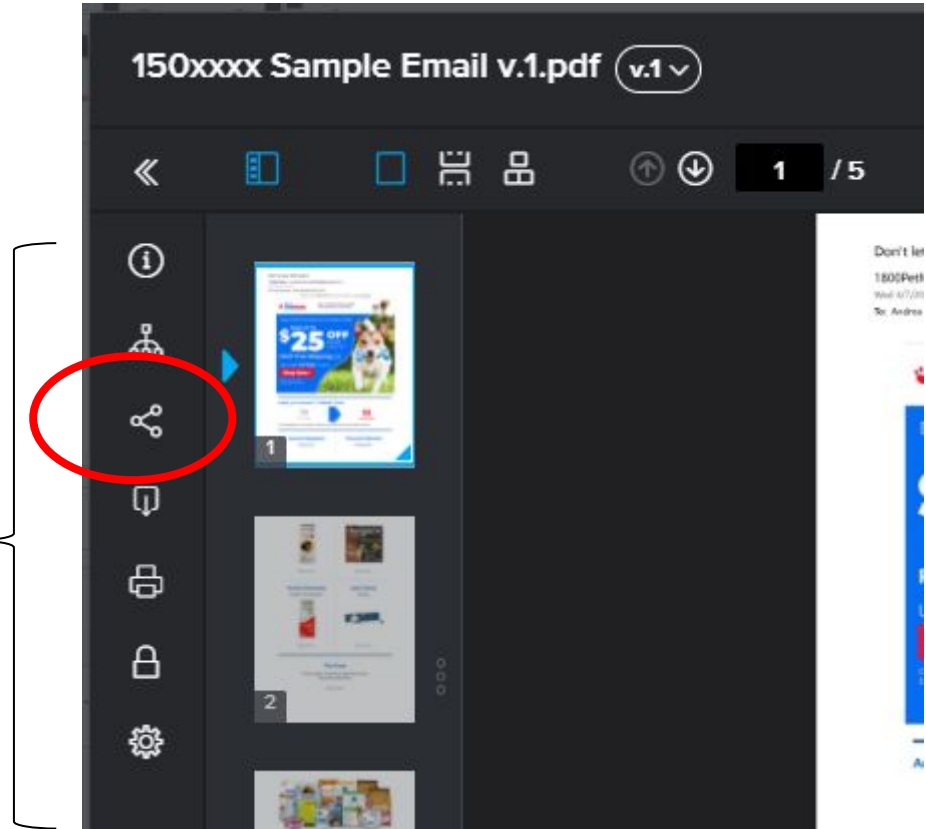
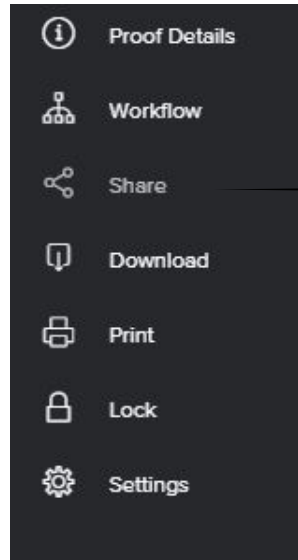
- From the Proof, select Open Proof

The screenshot displays the ProofHQ interface. At the top, there are navigation tabs: Tasks, Project Details, Updates, Documents (1), Requests, Risks, and More. Below these are action buttons: Add new, Download selected, Preview, Share, Delete, and More. The main content area is divided into a left sidebar and a main panel. The sidebar has a 'Folders' section with a left arrow and a 'PROJECT FOLDERS' section with a dropdown arrow. The main panel shows 'PROJECT FOLDERS(1)' and a document entry for '150xxxx Sample Email v.1.pdf'. The document entry includes a thumbnail, the title, and the text 'Added Just now by Andrea Pikulinski - Comment'. Below this, there are links for 'Document Details', 'Proof Details', 'Print Summary', and 'Open Proof'. The 'Open Proof' link is circled in red.

Tasks	Project Details	Updates	Documents (1)	Requests	Risks	More ▾
Add new ▾	Download selected	Preview	Share ▾	Delete	More ▾	
Folders	«	PROJECT FOLDERS(1)				
▾ PROJECT FOLDERS		 150xxxx Sample Email v.1.pdf Added Just now by Andrea Pikulinski - Comment Document Details • Proof Details • Print Summary • Open Proof				

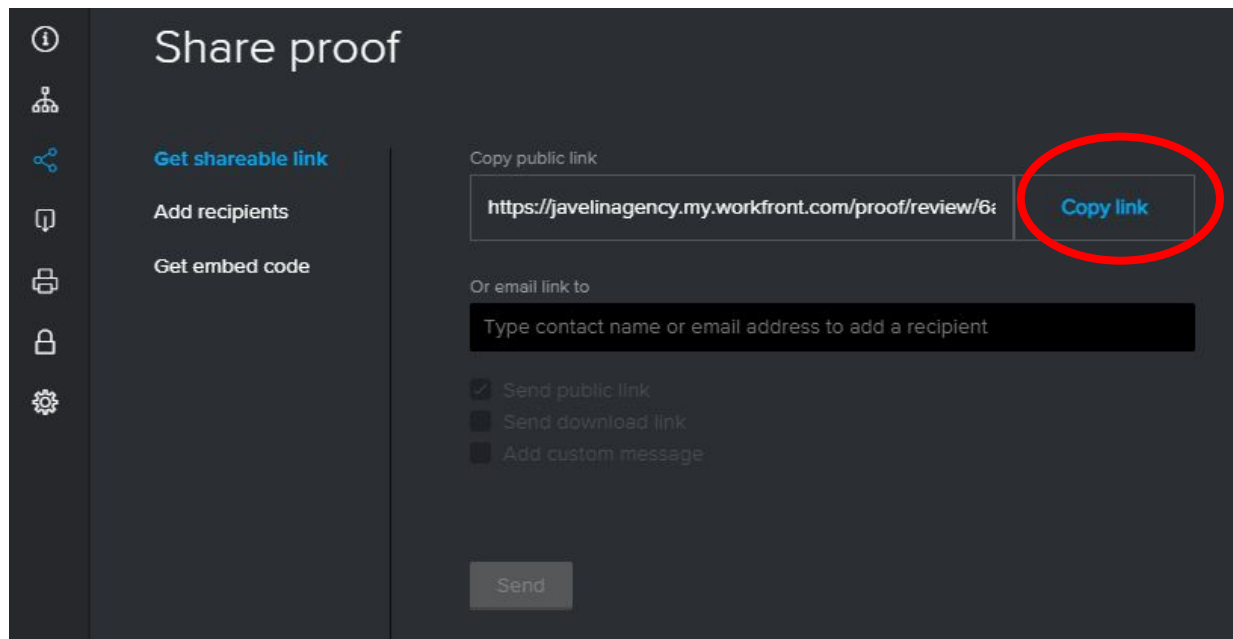
Sharing the Proof

- Select the SHARE PROOF icon in left bar



Unique Link to proof

- Quick option for proof delivery is to use a shareable link that can be included in your own email outside of Workfront PHQ.



Share proof

Get shareable link

Add recipients

Get embed code

Copy public link

<https://javelinagency.my.workfront.com/proof/review/6i> **Copy link**

Or email link to

Type contact name or email address to add a recipient

Send public link

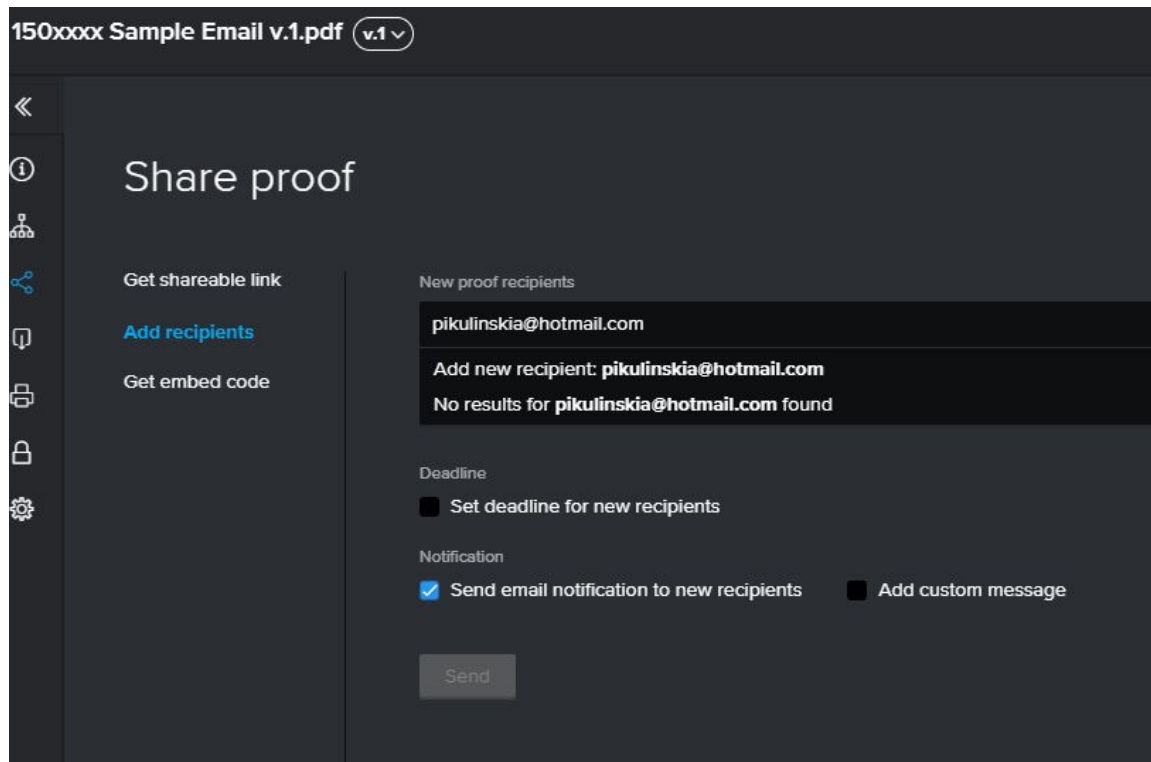
Send download link

Add custom message

Send

Sharing Proof via PHQ

- Populate Proof recipient's names or email addresses
- New email addresses can be added
- Previous email addresses are stored for future use
- Multiple recipients can be added



Reviewer Roles & Alerts

- Proof roles are set by recipient to allow different levels of review
- Email alerts allow customizing of frequency & level of detail for each recipient

The screenshot displays the 'Share proof' interface. On the left, there are options for 'Get shareable link', 'Add recipients', and 'Get embed code'. The main area shows a table of recipients with columns for 'New proof recipients', 'Proof role', and 'Email alerts'. One recipient, 'pikulinskia@hotmail.com', is listed with the role 'Reviewer & approver'. A dropdown menu is open for this recipient, showing options: 'Read only', 'Reviewer', 'Approver', and 'Reviewer & approver'. Another dropdown menu is open for the 'Email alerts' column, showing options: 'Daily summary', 'Hourly summary', 'Daily summary', and 'Disabled'. The interface also shows 'Already collaborating 1 user' and a 'Deadline' field.

Share proof

Get shareable link

Add recipients

Get embed code

New proof recipients	Proof role	Email alerts
pikulinskia@hotmail.com	Reviewer & approver	Daily summary

Type contact name or email address to

Already collaborating 1 user See details

Deadline

Read only

Reviewer

Approver

Reviewer & approver

Email alerts

Daily summary

All activity

Replies to my comments

Decisions

Final decision

Hourly summary

Daily summary

Disabled

Reviewer Message & Proof Link

- Enter custom message to reviewers
- Make sure to have an engaging Subject line with due date included
- In body of Message, include timeline and any other critical review element.
- Use formatting toolbar at bottom to enhance message

Make sure to click SEND with whatever option you use!



Deadline

Set deadline for new recipients

Notification

Send email notification to new recipients Add custom message

Subject

FOR REVIEW: Special Email copy review - due today

Message

Good morning Team-

Please see link below for the Special Email. Please provide feedback by today or we will fall behind schedule. If there is no feedback we will sent to legal for review.

Schedule:

R1 to Team - 3/3

R1 feedback due - 3/5

R2 to Legal - 3/8

R2 feedback due - 3/11

B / U | | 14 pt | | | |

Send

Email notification to Reviewer

- Reviewer receives a personalized email with link to the proof – GO TO PROOF button
- Thumbnail of item to review is included
- Specialized note indicating this link is unique to them and if forwarded, any feedback will be noted as the recipient's feedback.
- Review provides feedback within Proof as previously shown


outlook.live.com/mail/0/deeplink?popoutv2=1&version=20210405005.03

Reply Delete Junk Block ...

FOR REVIEW: Special Email copy review - due today

You have **1 new proof** to review.

[Go to proof](#) ⓘ This is your unique proofing link. Anyone who clicks this link accesses the proof as you. Please keep this in mind when forwarding or replying to this email.

 **Proof name:** 150xxxx Sample Email v.1.pdf
Version: 1
[Share this proof with someone else](#)

Proof progress: S O C D Proof status is Pending

Stage 1 S O C D Decisions 0 of 1

Andrea Pikulinski is a Reviewer S O C No comments

pikulinskia@hotmail.com is a Reviewer & Approver S O C D No comments, No decision.

workfront

Reply | Forward

Tracking Reviewer Activity - Documents

- Within the Documents tab on the actual proof, number of comments posted can be seen
- Proof stage is shown on the right side of page; S = sent, O = open, C = comment, D = decision

The screenshot displays a document review interface. At the top, there are tabs for 'Updates', 'Documents (1)', 'Requests', 'Risks', and 'More'. Below the tabs, there is a search bar with the text 'all'. A red arrow points to the 'Documents (1)' tab. Below the search bar, there is a section for 'PROJECT FOLDERS(1)'. Underneath, a document entry is shown with a thumbnail, the title '150xxxx Sample Email v.1.pdf', and the text 'Added 1 hour ago by Andrea Pikulinski'. A red circle highlights the comment count '3'. To the right of the document entry, there is a proof stage indicator 'S O C D', where 'S' is highlighted in green.

Tracking Reviewer Activity – Proofing Details

- At Document level, the Proof Details link provides an overview of proof reviewers and their activity



150xxxx Sample Email v.1.pdf

Added on Yesterday at 10:41 pm by Andrea Pikulinski 4

Document Details • **Proof Details** • Print Summary •

Proofing Details

Workflow

S **D** **C** **D** Pending

Convert to Automated W

Stage 1

S **D** **C** **D** Pending

No deadline

<input type="checkbox"/>				Role	Email alerts
<input type="checkbox"/>	Me [owner]	2/0	S D C D	-	Reviewer Daily summary
<input type="checkbox"/>	Jessica Thai	0/0	S D C D	-	Reviewer Daily summary
<input checked="" type="checkbox"/>	pikulinskia@hotmail.com	2/0	S D C D	Pending	Reviewer & Approv Daily summary

> More sharing options

> Settings

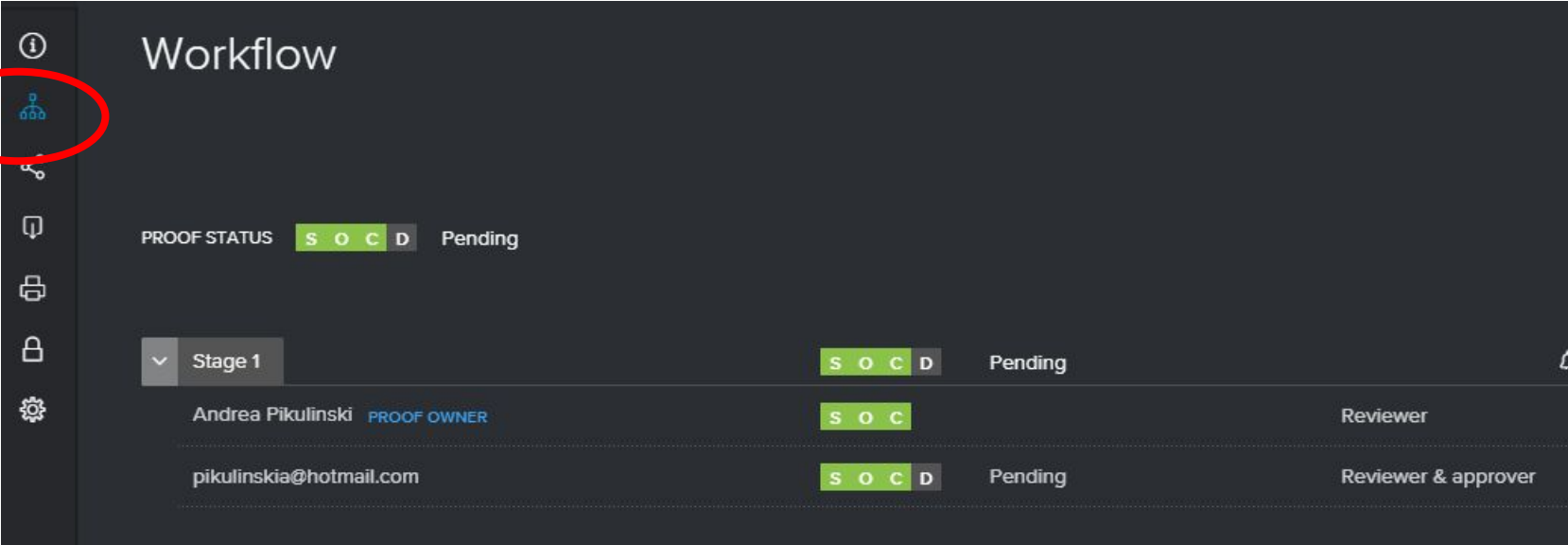
> Activity

Date	Action	Details
8 Apr 2021 00:16	New comment	Andrea Pikulinski: @Jessica Thai please provide direction on color of the bone.
8 Apr 2021 00:16	New people added	Jessica Thai (Email notifications disabled) by Andrea Pikulinski
7 Apr 2021 23:45	New comment	Andrea Pikulinski: update subject line to xxxxx
7 Apr 2021 23:29	New comment	pikulinskia@hotmail.com: change to \$10
7 Apr 2021 23:29	New comment	pikulinskia@hotmail.com: needs to say "Fast & Reduced Shipping"
7 Apr 2021 23:28	Proof first opened	by pikulinskia@hotmail.com
7 Apr 2021 23:19	New people added	pikulinskia@hotmail.com (Email notifications enabled) by Andrea Pikulinski
7 Apr 2021 23:19	Proof status has been changed	From Not relevant to Pending

Done

Tracking Reviewer Activity – ProofHQ window

- Within Proof, select the Workflow icon to see activity by reviewer
- Reviewer types cannot be updated in this window



The screenshot displays the 'Workflow' window in ProofHQ. A red circle highlights the 'Workflow' icon in the left-hand navigation menu. The main content area shows the 'PROOF STATUS' as 'S O C D Pending'. Below this, a 'Stage 1' dropdown is visible. The activity table lists the following details:

Reviewer	Status	Activity
Andrea Pikulinski <small>PROOF OWNER</small>	S O C	
pikulinskia@hotmail.com	S O C D	Pending

Tracking Reviewer Activity – Email Notification

- Daily Notification emails are sent to proof owner & reviewers with activity listed

Daily summary: 150xxxx Sample Email v.1.pdf



Andrea Pikulinski <notification@javelinagency.my.workfront.com>
To: Andrea Pikulinski (Javelin)

Reply Reply All Forward

Thu 4/1

Retention Policy Omnicon Inbox (90 days)

Expires 7/7/2021

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi Andrea

New activity in the last day is highlighted in bold.

Comments:

- pikulinskia@hotmail.com**
needs to say "Fast & Reduced Shipping"
- pikulinskia@hotmail.com**
change to \$10
- Andrea Pikulinski**
update subject line to xxxxx

[Go to proof](#)

[View details](#)

This is your unique proofing link. Anyone who clicks this link accesses the proof as you. Please keep this in mind when forwarding or replying to this email.



Proof name: 150xxxx Sample Email v.1.pdf

Version: 1

[Share this proof with someone else](#)

Proof progress:

S O C D

Proof status is Pending

Stage 1

S O C D

Decisions 0 of 1

Andrea Pikulinski is a Reviewer

S O C

1 comment

[pikulinskia@hotmail.com](#) is a Reviewer & Approver

S O C D

2 comments. No decision.

Best Practice / Tips:

- Delegate proof ownership to a backup when going on vacation or OOO;
 - From the Documents tab, select “Proof Details” for the proof (2 options below)
 - Select the 3 dots next to the name of the person you want to be owner or to delegate ownership.

Via document

150xxxx Sample Email v.1.pdf

Added on Apr 8 at 7:24 am by Andreea Pikulinski - Comment

Document Details • **Proof Details** • Print Summary • Open Proof

Via right column document details

✓ Open Proof ↓ Download (618K)
Proofing
 4/8/21 - S O C **Details**
Approvals
 Start typing name or email...

Stage 1

S O C - 12 Apr 2021 18:00

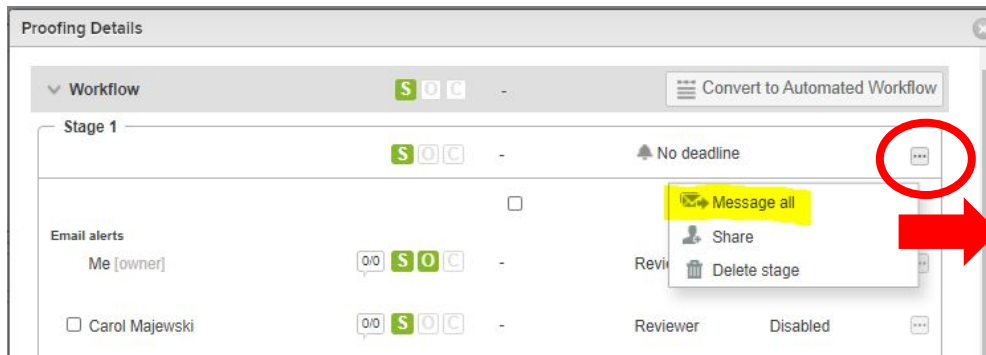
		Role	Email alerts
<input type="checkbox"/>	Me [owner]	0/0 S O C -	Reviewer Daily summary ...
<input type="checkbox"/>	Jessica Thai	0/0 S O C -	Reviewer Daily summary ...
<input type="checkbox"/>	Sarah Kleinwechter	0/0 S O C -	Reviewer Daily summary ...

> More sharing options
 > Settings
 > Activity

- Message
- Edit
- Make owner**
- Delegate ownership**
- Remove

Best Practice / Tips:

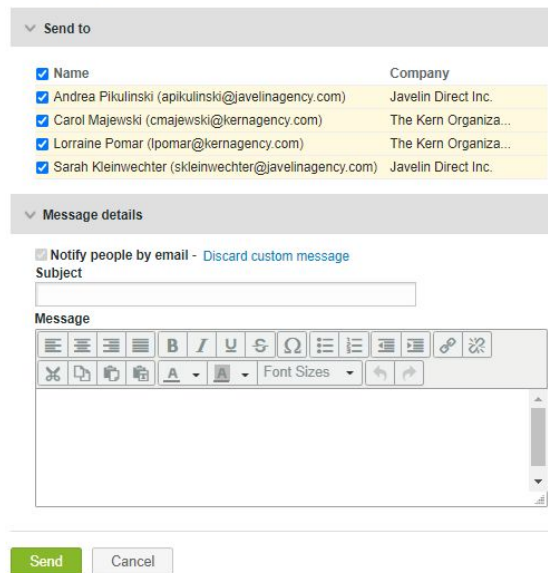
- Make sure to include a timeline in Proof email for clarity and documentation
- Person who routes proof does not get a copy when proof is sent; sometimes hard to confirm delivery
- Send reminder emails via PHQ for feedback submission



The screenshot shows the 'Proofing Details' interface. At the top, there is a 'Workflow' section with a 'Convert to Automated Workflow' button. Below it is 'Stage 1' with a 'No deadline' indicator and a three-dot menu icon circled in red. A context menu is open over this menu, with 'Message all' highlighted in yellow. A red arrow points from the 'Message all' option to the right. Below the stage, there is an 'Email alerts' section with a table of alerts:

Alert	Icons	Reviewer	Status
Me [owner]	010 S O C	Reviewer	Disabled
<input type="checkbox"/> Carol Majewski	010 S O C	Reviewer	Disabled

Message



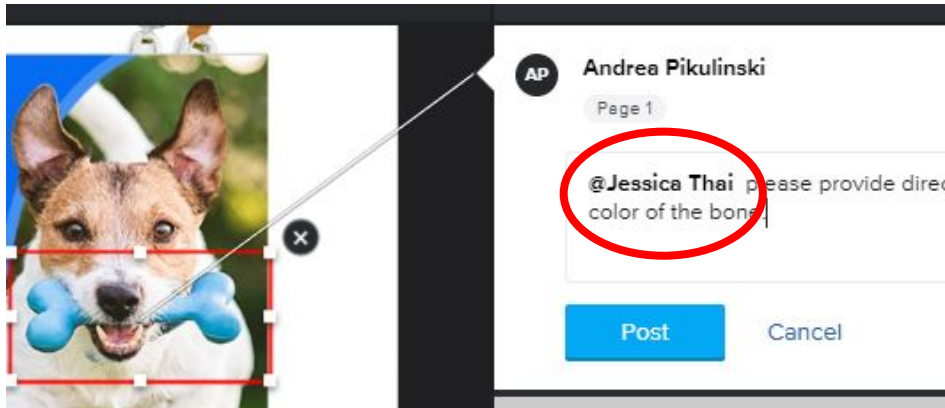
The screenshot shows the 'Message' composition interface. It includes a 'Send to' section with a list of recipients:

Name	Company
<input checked="" type="checkbox"/> Andrea Pikulinski (apikulinski@javelinagency.com)	Javelin Direct Inc.
<input checked="" type="checkbox"/> Carol Majewski (cmajewski@kernagency.com)	The Kern Organiza...
<input checked="" type="checkbox"/> Lorraine Pomar (lpomar@kernagency.com)	The Kern Organiza...
<input checked="" type="checkbox"/> Sarah Kleinwechter (skleinwechter@javelinagency.com)	Javelin Direct Inc.

Below the recipients is the 'Message details' section, which includes a 'Notify people by email' checkbox and a 'Subject' field. The main message body is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and font size. At the bottom, there are 'Send' and 'Cancel' buttons.

Best Practice / Tips:

- Tag clients / proof reviewers in Proof comments using @ to access reviewer address in PHQ – tagged person gets notification automatically



Questions?



Wrap-up and Next Steps

Continue the Conversation on Workfront One

- Collaborate with others in a similar industry or department
- Harness the power of your peers to crowdsource inspiration and solutions
- Learn about upcoming events

The screenshot shows the Workfront ONE website homepage. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support: 844-306-4357. A welcome message reads: "Welcome Workfront Customers and Partners! Explore the tabs below to: check out our featured content to help you do your best work, find what's popular with other users, read the latest news, and find out what this site is all about." Below this is a large image of a group of people in a meeting. The main content area is divided into four featured cards: "Take advantage of Virtual Leap" (with a "Register today" button), "The new Workfront experience" (with a "Learn more" button), "Join the Community" (with a "See the latest discussions" button), and "Network with Workfront Users" (with a "See all 8 topics" button). At the bottom, there is a "Community Discussions" section with a "Question" tab selected, a search bar, and a "Sort by" dropdown set to "Latest Posts". A discussion titled "For the Love of Pets" by Workboldy - Kristin Farwell is visible, dated June 8, 2020 at 7:50 AM. To the right, a "Product updates" section lists "What's new in Workfront" with links for "2020.2 release overview" and "2020.3 release overview", and "What's new in Workfront Library" with a link for "Workfront Library release activity".

Upcoming Virtual User Groups

one.workfront.com/events

- Apr 20: Transitioning to the New Workfront Experience
- May 4: Leveraging the Group Admin Role
- May 11: Request Queues and Intake Forms

Coming soon!

- *Resource Management*
- *Training & Onboarding Users*
- *Reporting & Dashboards*



Leap is now part of
Adobe Summit—The Digital
Experience Conference.

Adobe **SUMMIT**

A free virtual event April 27-28, 2021

SUMMIT

Thank you.

