

23INT - Seamless Content Collaboration Made Easy

Top 20 Questions & Answers

- 1. Q: Does this feature (Proofing) work, let's say if someone has sent me a YouTube video to review. Can I add a link to it? Or do I have to upload it?**

A: If you would like to view and comment on a video in Proofing, you should upload the video file directly into Smartsheet. You could also add a link to the YouTube video in the Proof, but you would not be able to see the video in the Proof.
- 2. Q: We have some video production work that a subcontractor has done and they don't have Smartsheet, but they want feedback from me. How can I do that?**

A: If someone wants to upload a file to Smartsheet proofing and send a feedback request, they need to have a Smartsheet license and be at least an editor on the sheet.
- 3. Q: Any thoughts on adding a due date field in the request feedback form?**

A: That's a great suggestion! In the meantime you can customize the request message to indicate when you would like the feedback to be complete by.
- 4. Q: What permissions are required to upload to a proof and send a review request?**

A: A user must have a license and be an editor or above on a sheet
- 5. Q: What permissions are required to review a proof?**

A: A licensed user can send a review request to anyone with a valid email address to review a proof on the external proof page. They will not be brought into your Smartsheet account or into the sheet where the proof is located.
- 6. Q: What plans is Proofing available?**

A: Proofing is available on Business, Enterprise, and Premier Plans
- 7. Q: Is the Adobe Creative Cloud extension included in a Smartsheet license?**

A: Yes! If you have a license to Smartsheet, you can use the Adobe Creative Cloud extension to view your work and send files to Proofing in Smartsheet.

8. Q: What Adobe Creative Cloud product does the extension work with?

A: Photoshop, Illustrator, and InDesign

9. Q: What's the difference between an Attachment and a Proof

A: Attachments work well as the inputs to a row or task so that the person responsible for delivering a piece of content has all the assets they need, like logos, style guides, etc. to complete their work. You can upload multiple files into attachments. Proofs work well for the outputs of a row or task, and there is only one proof per row.

10. Q: What file types do you support previews of in Proofing?

A: jpg, jpeg, png, bmp, gif, mp4, avi, mov, pdf, doc, docx, dot, rtf, xls, xlt, xlsx, xltx, ppt, pot, pps, pptx, potx, ppsx

11. Q: What files can you include in a Proof where there isn't a preview?

A: You can include any file that Smartsheet supports in Attachments in Proofing, but if it isn't one of the file types above you won't be able to preview it. For example, you can link to a Google Doc in the Proof, but it won't preview the Google Doc, and you would still have to access it in another tab. You can still use the request, commenting, version control, and approval capabilities in Proofing with these files though.

12. Q: Can I share a Proof without asking for approval?

A: Anyone with access to the sheet can open existing proofs. If you would like informal feedback from specific feedback, you can add a comment to the proof and tag them using an @mention. People with at least Editor permissions on the sheet can comment on and mark up the proof with annotations. Only people who've received a formal request for feedback can officially approve or require changes.

13. Q: How do I send a formal proof request where someone can submit an approval?

A: Click the Request Feedback button in the proof. Add the people you would like to include in the review cycle. Reviewers do not need a Smartsheet license but will need to log in before providing feedback. Customize your request message as desired. Click send to send alerts to the reviewers. Each person will be notified of the request and a link in the notification will send them all to a dedicated external review page for that proof where they can provide feedback without accessing the sheet. You can click on the arrow icon at the top of the proof to jump over to the external review page if you wish.

14. Q: How do I provide feedback in a proof?

A: There are three types of feedback:

- i. General comments are added to the proof without any associated annotation.
- ii. Annotated comments combine the comment with a pin, box, or arrow and offer clearer feedback for the content creator.

- iii. Each reviewer's official response (i.e., approval decision) is logged in the proof by clicking the Approved or Requires Changes buttons.

15. Q: How do I provide feedback on a video proof?

A: Videos proofs are a little different in that annotated comments are added to specific frames in the video. You can use all of the same markup tools to add the annotations.

- o You have four options for navigating to a frame that requires an annotation:
 - i. Click the Play button and then click the pause button when you reach the correct frame.
 - ii. Click the Step Forward button to move the video 1 second forward.
 - iii. Click the Step Back button to move the video 1 second back.
 - iv. Click anywhere on the video timeline to move to that moment.
- o When you add an annotation, the frame is marked in the video timeline with your profile image.
- o After adding an annotation to a video frame, there are two ways to jump back to that frame:
 - i. Click on the associated comment.
 - ii. Click on your profile image in the video timeline.

16. Q: How do I upload a new version to the Proof?

A: If the reviewers require changes in your proof, it's easy to add another version whenever you're ready. Simply click on the Version dropdown at the top of the proof and select Create New Version. The previous version will then be locked to further comments and annotations.

17. Q: How do I complete a Proof?

A: To close the loop on a proof when you have the feedback you need, move the toggle button at the top of the proof to Complete. Setting a proof to complete sets it to read-only so no new versions can be added, and comments can't be added or edited.

18. Q: How do I cancel a Proof Request?

A: At the top of the proof, open the kebob menu and select "Cancel Review Request" and the users previously asked to review won't be able to access the Proof, although their existing comments will remain.

19. Q: Does Proofing work on mobile?

A: Yes. The mobile app makes it easy to see the overall list of proofs on a sheet and whether a proof is attached to a row. Users will also receive review requests via the mobile notification center. Clicking on a proof directly in the sheet (or clicking on Go to Proof in the request notification) will send the user to the external review page, which is available via the mobile browser.

20. Q: What happens if I delete/copy/cut/lock/move a row that has an active proof?

A: Delete: The proof will be deleted with the row

- Copy: The proof will NOT be copied over with the rest of the row data.
- Cut: When you cut and paste to another location, the proof WILL be moved
- Lock: Only owners/admins can comment/upload/take actions on a proof when the row is locked. No one can send a review request for a proof whose row is locked.
- Move in sheet (drag and drop): The proof will move with the row.
- Move to another sheet (manual or automated move row action): The proof will move with the row.
- Copy to another sheet (manual or automated copy row action): The proof will not copy over with the row.