

A Checklist for Choosing the Right Online Proofing Solution



Once you've decided it's time to invest in an [online proofing solution](#) for your creative marketing team, you'll then need to evaluate and compare the different available solutions. To help you through this process, we've put together this checklist which you can use to compare different proofing solutions and decide which one is right for you.

Content Types	Supported?
Given the wide range of marketing channels in use today, your online proofing system should support media types across design files, static content, website pages and rich media such as audio and visual files. This allows for multi-channel campaigns to be reviewed simultaneously within the same system, avoiding time-sinking context switching between apps.	
Images - JPG, PNGs, BMP, TIFF, AI, PSD etc.	
Documents - PDF, DOC, DOCX, XLS/XLST, PPT/PPTX, etc.	
Live websites, Website snapshots - review in any resolution	
Rich Media - HTML5, Animated GIFs	
Video & Audio	
Proofs accurately represent the original - see our blog post here on how to use the Altona Test Suite for your own testing .	
Handles large file uploads & loads quickly for reviewers	
Other formats not listed above - _____, _____, _____, _____, _____	

Comments & Annotations	Supported?
The ability to provide precise feedback via markups to content is an absolute requirement for an online proofing solution. Comments and replies should be easy to make and markups should be as simple and straightforward as using PowerPoint or Google Sheets.	
Real-time comment threads	
Several markup tools to provide accurate feedback	
Select multiple parts of text on a proof and annotate	
Attach files to comments	
Private (internal) comments that only certain reviewers can view	
@mentions to send a notification directly to another reviewer	
Label comments and filter by label(s)	
Resolve comments and filter by resolution status	
Filter comments by page, reviewer, stage, etc.	
Recover deleted comments	
Responsive design to support mobile review and approval	

<p>Version Management & Proof Comparison</p> <p>Version management and comparison is a critical feature set in any enterprise online proofing solution. Not only does it help verify that requested changes were made and progress is being made, but it's also vital to any compliance requirements.</p>	<p>Supported?</p>
<p>Create and access prior versions easily</p>	
<p>Automatically give reviewers access to all versions</p>	
<p>Compare any two versions side by side</p>	
<p>Automatically have changes highlighted between versions</p>	
<p>Minor versions support for internal review cycles</p>	
<p>Automated Workflow</p> <p>To both ensure consistency of review cycles and for large scale online proofing deployments with complex, multi-stage review processes, an automated workflow is essential to making sure the right team members are included in the process, at the right time, with the proper roles.</p>	<p>Supported?</p>
<p>Create custom workflows based on your review processes</p>	
<p>Save and reuse workflow templates</p>	
<p>Set deadlines by workflow stage</p>	
<p>Lock stages and proofs when decisions have been made</p>	
<p>Set deadlines by workflow stage</p>	
<p>Able to add reviewers to multiple stages on the same proof</p>	
<p>Make a specific reviewer the primary decision maker</p>	
<p>Hide proofs from the dashboard until a reviewer's stage starts</p>	
<p>Notifications & Reminders</p> <p>Given the urgency of most creative projects, real-time notifications should be available to update you on project collaboration efforts, statuses, comments and more. Additionally, flexibility should be provided to tailor notification preferences, as well as extend notifications to other applications (see "Integrations").</p>	<p>Supported?</p>
<p>Notify reviewers when a new version is ready for review by email and in the app</p>	
<p>Automatically send reminders before, on and after the deadline</p>	
<p>Only notify reviewers when their stage starts</p>	
<p>Ability to suppress notifications at stage and proof level</p>	
<p>Customize email notifications</p>	

Dashboards & Reporting	Supported?
See all your proofs, statuses and track their progress easily	
Easily drill down to track the progress by stage and reviewer	
Dynamically filter proofs by any field	
Create, save and share custom views	
Export your proof data for easy reporting	
Folders to organize proofs by projects, clients, etc.	
Account Management	Supported?
Enterprise-ready online proofing solutions should offer the consistency of group-level permissions, as well as the flexibility of individual permissions for specific reviewers. This allows clients, partners, and vendors to contribute as named group members or as guests.	
Sign-up and manage multiple accounts using a single log-in	
Branding using logos, favicons, colors	
Choose your own subdomain or customize the domain	
Manage multiple brands across accounts	
Custom properties to capture and filter on extended proof information	
Integrations	Supported?
Enterprise-ready online proofing solutions should offer integrations with other cloud-based tools and systems, either via ready-to-run extensions, or via simple programming interfaces, such as public APIs.	
Publicly available API	
Integrates with your existing technology stack	
Cloud storage integrations	
Security & Reliability	Supported?
When considering the intellectual property in your (and your client's) creative work, security standards should guarantee that all proofs, comments, and associated files are secure and private.	
Configure Single Sign-on	
Vendor is SOC 2 compliant	
Securely share proofs with users and guests	
Control sharing settings to only internal and trusted users	
Disaster recovery is part of the vendor's standard offering	
Qualys SSL Labs Score	