



Reviewer Forwarding

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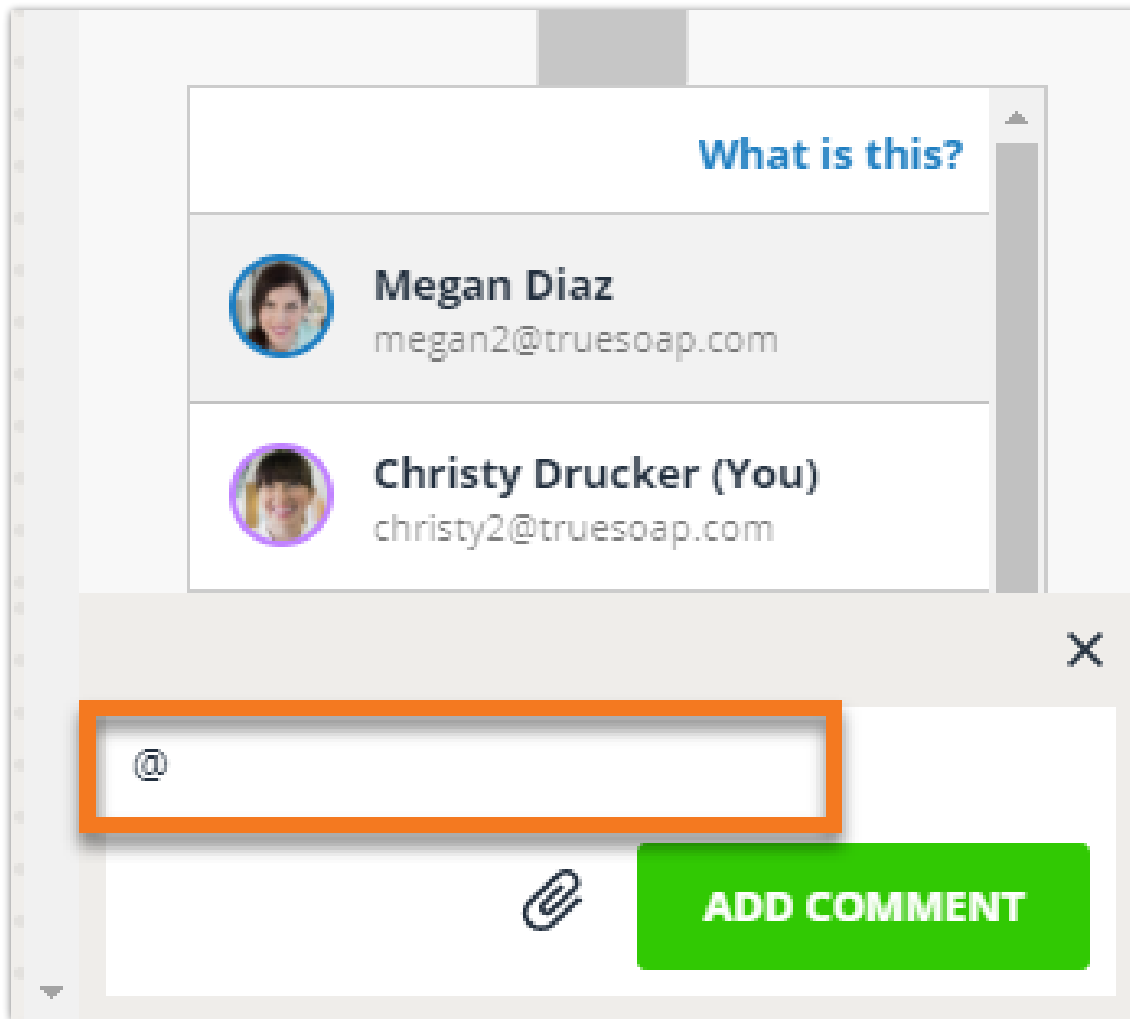
If enabled, active reviewers are able to @mention reviewers and share proofs.

@mentioning and sharing are very similar. They will both provide access to the proof and make that person an active reviewer within the proof. The difference is that, unlike sharing, you can @mention existing reviewers and the resulting email notification will include the comment where the new reviewer was mentioned.

@Mentioning

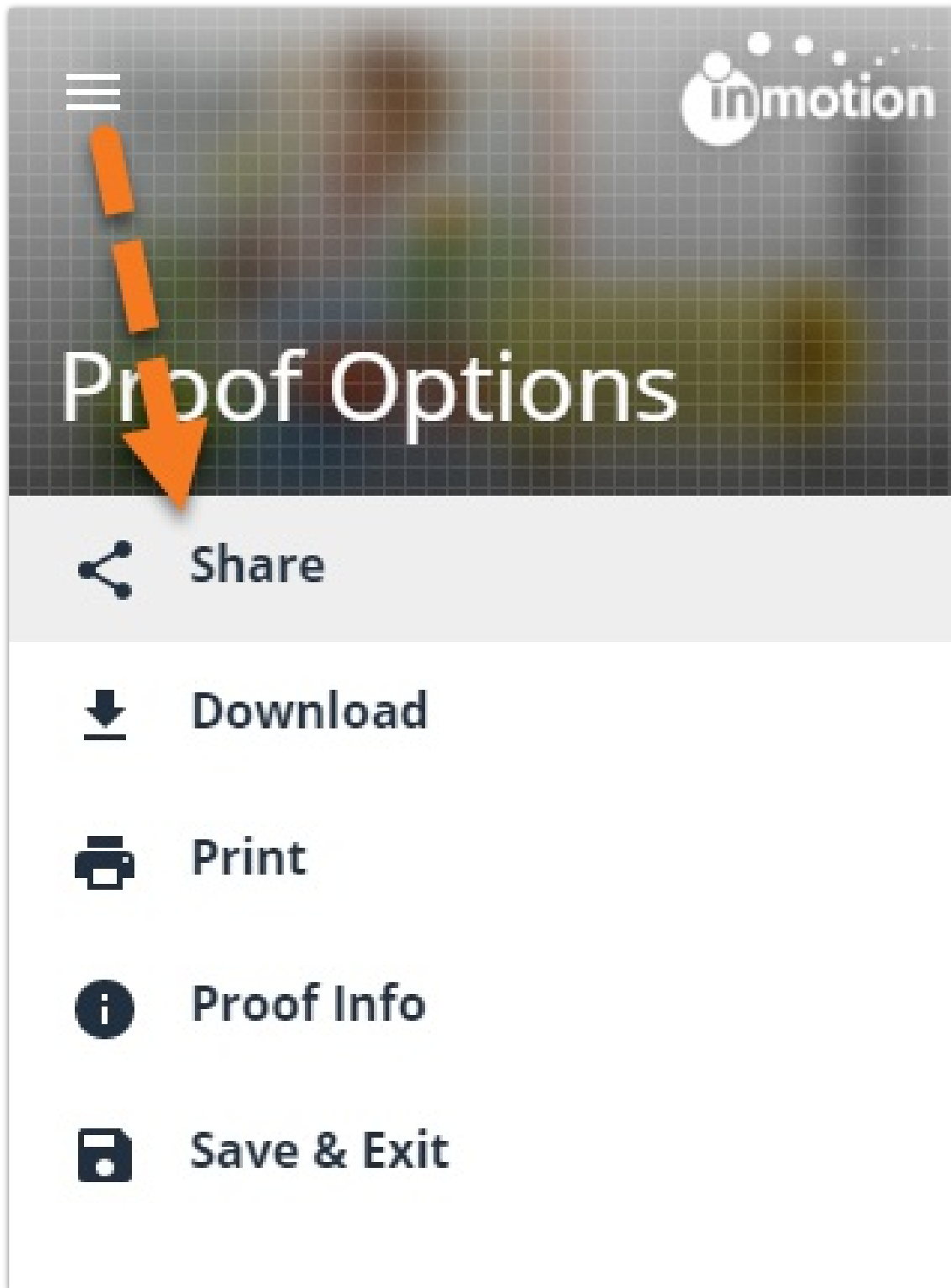
From inside the review environment, reviewers can @mention by starting an annotation or general comment and typing '@' in the comment field. This will expand a list of current reviewers that you can select by clicking. You can narrow the list by typing the name of the person you are mentioning.

If the person that you are mentioning is not a reviewer in the specific proof, you can simply @mention their email address. This will send them your comment and an invitation link to the proof via email, and it will add them to the workflow as a required reviewer.



Sharing

To Share a proof, click the menu button at the top-left corner of the review environment to open the **'Proof Options'** menu. From there, you can click the **Share** button. This will prompt you to add one or more email addresses to share the proof with. Each person that you share the proof with, will become a required reviewer and receive an email notification containing a link to the proof.

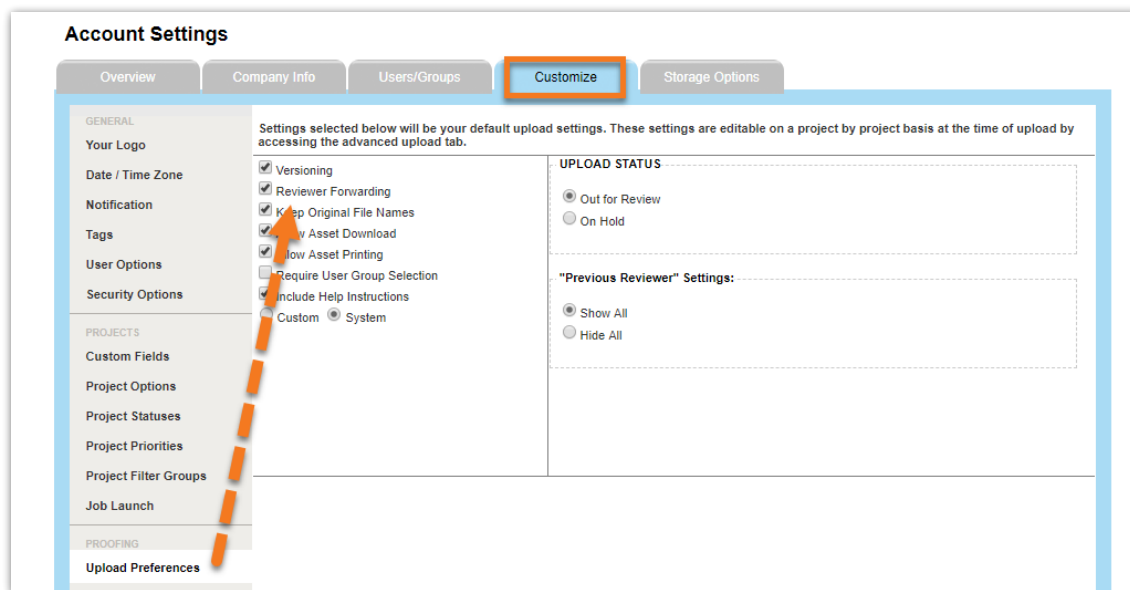


Settings: Enabling @mentioning and sharing

The ability to @mention and share proofs is controlled by the **'Reviewer Forwarding'** setting, which is customizable and can be controlled at the contact, proof, workflow and account-level of the inMotion platform.

Account Settings

If you go to **Account > Account Settings > Customize > Upload Preferences**, you can enable **'Reviewer Forwarding'** at the account-level. This will enable reviewer forwarding for all new proofs by default.



Proof Settings

When posting a proof, you can enable/disable reviewer forwarding from the **'Release Options'** page on left side of the page.

Release Options

Review Interface Options

Approval Options

☒ Approved as is
 ☒ Approved with changes
 ☒ Change and resubmit
 ☐ Contact me
 ☒ Not relevant

Other Options

☐ Place proof On Hold
 ☒ Allow forwarding

☒ All Contacts
 ☐ All Authorized Contacts

☒ Allow proof download
 ☒ Allow proof printing

Assign to User Group

No User Group

Deadline

Email Options

☐ Do NOT send an email notification
 ☒ christina@truesoap.com; caleb@truesoap.com; andy@truesoap.com
 ☐ Include list of Reviewers in the email
 ☐ Include list of Subscribers in the email

Subject

Proof Available for Review - "Landscape poster"


Email Body

Christina Edmond,

Optional: Type additional notes here. This will appear with the information

Proof "Landscape poster" is pending your review
Review this Proof (additional details below)
 Access Code: 4223c2

After a proof has been posted, reviewer forwarding can be enabled/disabled from the **'Proof Info'** page. At the bottom-left of the proof info page, click the **SHOW** button next to **'Advanced Options.'** From there, you can check/uncheck **'Allow Reviewer Forwarding'** and click the **SAVE** button.



WORKSPACES ▾MY REVIEWS (6)CONTACTSTASKS ▾


Proof Info - Landscape poster

Proof DetailsEDIT

Proof Status

Out for Review

Proof Assets



DOWNLOAD ⬇

Proof Name

Landscape poster

Project Name:

Access Code

4223c2

Deadline

Advanced Options

SHOW

Workflow Settings

If you like, reviewer forwarding can be restricted within workflows on a tier by tier basis. This is commonly utilized when you have both internal and external reviewers grouped by tiers in a workflow and you don't want the external reviewers to be able to invite others.

When building or editing a workflow, click the pen icon next to the rule to edit it. In the modal that pops up, you can check/uncheck **'Allow Reviewer Forwarding.'**

Rule Settings

Approval Settings

Move forward if

☒ All

☐ Any

Status is set to

☒ Approved as is

☐ Approved with changes

☒ Not Relevant

☐ Change and resubmit

☐ Contact me

☒ Skipped Reviewer

Rules

Move forward if all statuses include Approved as is, Not Relevant, or Skipped Reviewer

☐ Route to contacts in this tier sequentially

☒ Allow Reviewer Forwarding
Only valid when proof setting is selected.

☒ Send Email Notification to Reviewers

Reviewer Requirements

	Required	Optional
Grace Deng	<input checked="" type="radio"/>	<input type="radio"/>
Megan Diaz	<input checked="" type="radio"/>	<input type="radio"/>
Christy Drucker	<input checked="" type="radio"/>	<input type="radio"/>

Minimum Optional Reviewers Needed

Enter minimum number of optional reviewers required before moving to next tier.

Time Constraints

Enter a constraint that begins after all required and minimum number of optional reviewers have been met.

 Hours

OR

Deadline

Enter a deadline that moves the Review to the next tier no later than the date and time set.

Contact settings

Lastly, reviewer forwarding can be restricted for specific contacts. If you click on the **CONTACTS** tab and go to a specific contact, you will see that **'Reviewer Forwarding'** is the first permission in the list. Unchecking this will keep that Contact from @mention or share proofs.



We recommend that you leave this enabled for all contacts to prevent confusion in future proofs

