

Digital Proofing with Ziflow

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Overview

The Ziflow integration with Clarizen One provides a review and approval service that allows Clarizen users to share and collect feedback on files stored in Clarizen. The integration makes proofing files a seamless process within the context of your Clarizen projects and tasks.

Create and manage new proofs for any uploaded file or web snapshot in Clarizen. Clarizen users as well as invited guest reviewers will be able to contribute to the review and approval process.

The proofing process is also accessible via Clarizen's workflow and validation rules, so you can create proofs, start and stop the proofing process, edit reviewers and send alerts via Configurations.

Supported File Types in Ziflow

[Click here](#) for supported file types.

Purchasing and Licensing

To use the Ziflow integration in your Clarizen account, please contact your Clarizen Success Manager or our Support team.

Enabling the Integration

To enable the integration:

1. The Clarizen One admin must enable the integration in System Settings
2. A token must be entered into the Clarizen One admin's user settings as well as for each *collaborating* reviewer

1. Enable Proofing in System Settings

1. Log in to Clarizen One as an Admin.
2. Go to [System Settings](#).
3. Open the **Files and Collaboration** section.
4. Ensure that the **Enable Digital Proofing** option is enabled.
5. For **Digital Proofing Type**, select *Ziflow* if not already selected.
6. Select the **Enable Digital Proofing external collaboration** option to generate a Digital Proof email that allows both Clarizen users and external collaborators to access the file for proofing.

Settings

Global Settings **System Settings** Profiles Layout

- 1 ▶ Login and Password
- 2 ▶ Organization Settings
- 3 ▶ Permissions
- 4 ▶ User Interface Settings
- 5 ▶ User Management
- 6 ▼ Files and Collaboration

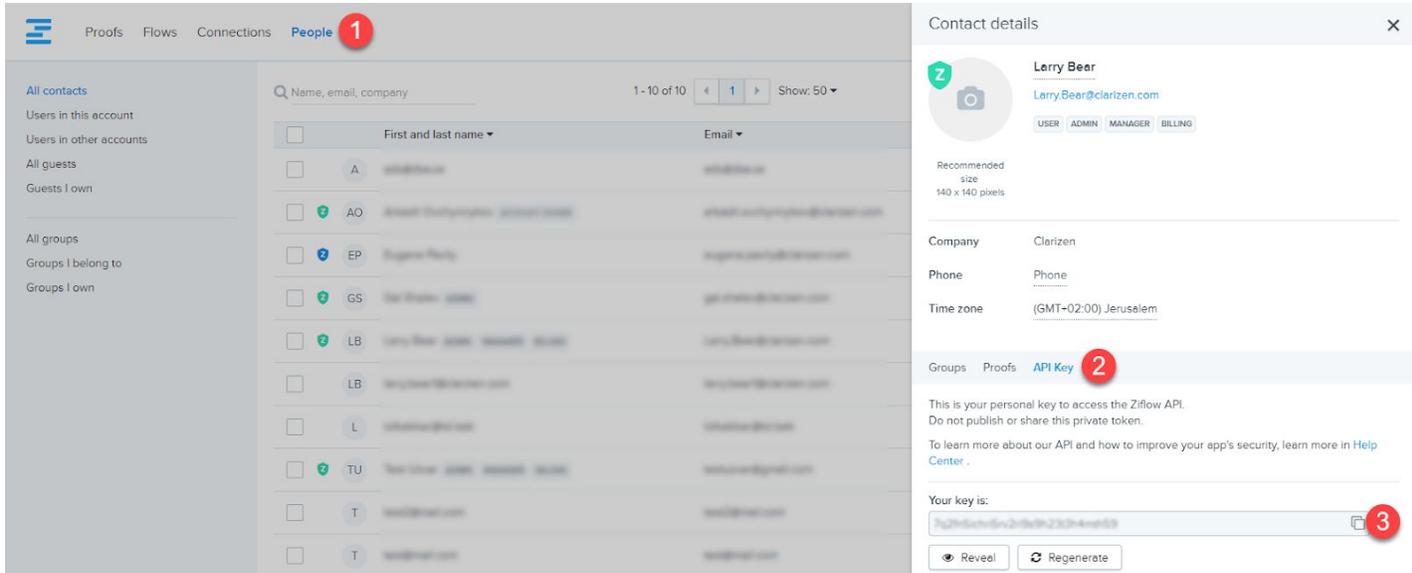
Options	Value	Default value
6.1 Enable File Viewer	<input checked="" type="checkbox"/>	On
6.2 Enable Chat	<input checked="" type="checkbox"/>	On
6.3 Enable Likes	Allow likes on posts ▼	Allow likes on posts only
6.4 Enable Digital Proofing	<input checked="" type="checkbox"/>	Off
6.5 Digital Proofing Type	ZiFlow ▼	ProofHQ
6.6 Enable Digital Proofing external collaboration	<input checked="" type="checkbox"/>	On
6.7 Enable Auto Lock Proof	<input checked="" type="checkbox"/>	Off

2. Enable Proofing for the Admin and Collaborators

A Ziflow token must be applied in the Admin's user settings in Clarizen. After that a user token must be applied to each collaborator in the collaborator's user settings.

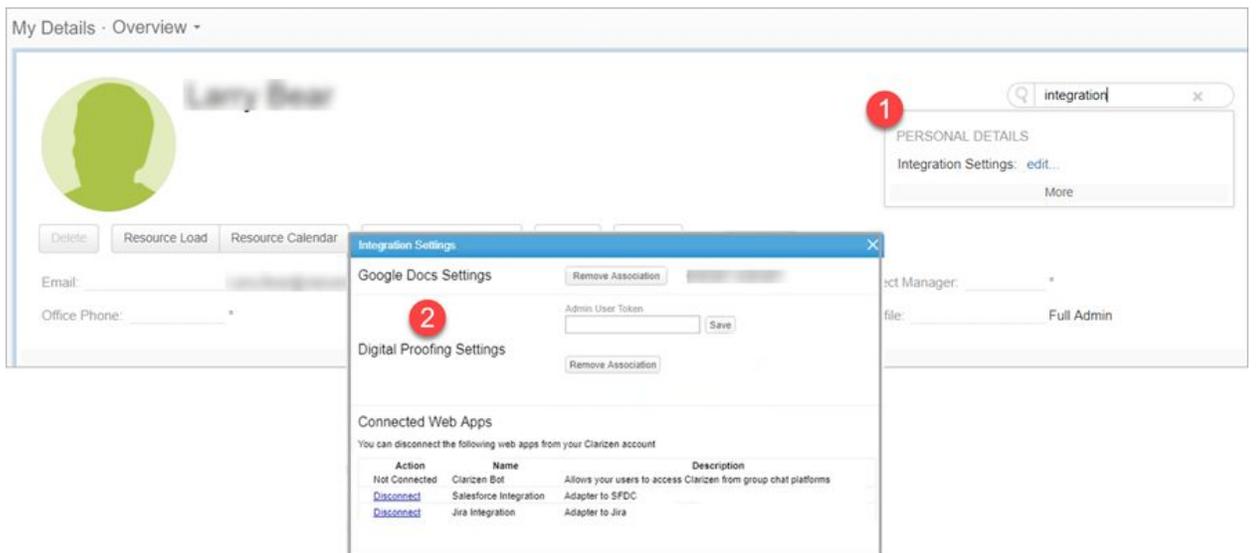
The following procedure should be performed first for the Admin and then for each collaborator.

1. Get the user token (API key) from from the Ziflow app:
 1. In Ziflow, open the **People** section and select the user.
 2. Open the **API Key** sub-section.
 3. Copy the API key



2. Paste the user token in Clarizen.

1. In Clarizen, locate or search for **Integration Settings** in the user's Property Card.
2. In the **Digital Proofing Settings** section, paste in the user token and click **Save**.



Creating or Editing a Proof

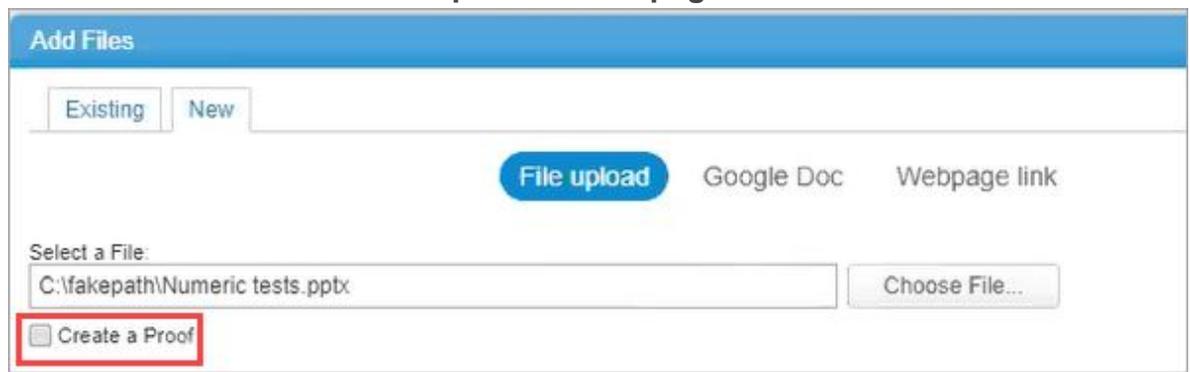
You can create a proof process on any existing file in Clarizen, or upload a new file for review. Once the process commences you can manage the users assigned for review and/or approval, upload versions of the file being proofed, and more.

1. In Clarizen, upload a related file or access a file associated with a Project, Task, etc.

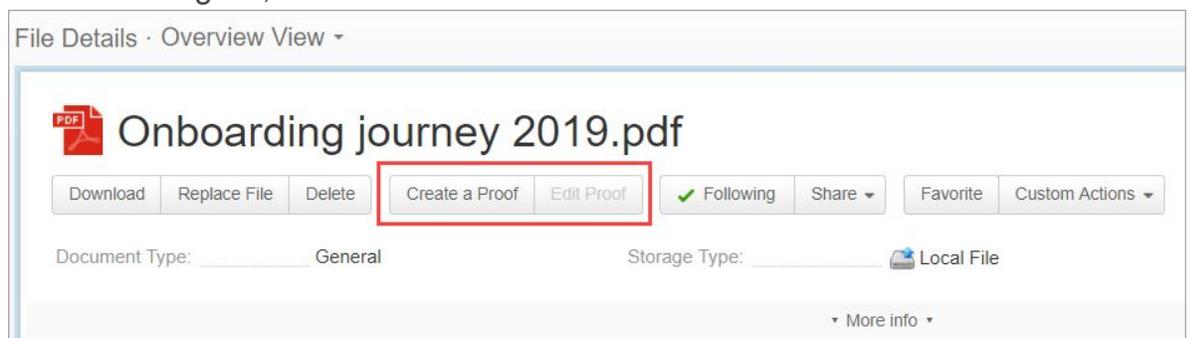
Note: The file must be saved in Clarizen. Files in Box, Google Drive, etc. cannot be used for proofing.

- If you are uploading a new file, select the **Create a Proof** option

Note: You can do this for **File upload** or **Webpage link**.



- For an existing file, click **Create a Proof**.



2. Click **Add reviewer**.

Create Proof

Proof Reviewers: All reviewers will be notified by email

Name	Role	Email alerts
Larry Bear [owner]	<input checked="" type="checkbox"/> View <input type="checkbox"/> Comment <input type="checkbox"/> Decision <input checked="" type="checkbox"/> Manage	All comments and decisions ▼
James Richard	<input checked="" type="checkbox"/> View <input type="checkbox"/> Comment <input checked="" type="checkbox"/> Decision <input type="checkbox"/> Manage	Decisions ▼

Add reviewer

Options

Decision deadline:

Lock the proof when all decisions are made
 Only one decision required
 Sync decisions to the file's discussion feed

Proof Message (Optional):

OK Cancel

3. Select a user group or user from within the organization or the email of an external reviewer.
4. For each user, define the User's role.
Note: For invited users that are not in the Ziflow account, you cannot select the **Manage** role.
5. Define email alerts sent to the reviewer.

Email alerts

- All comments and decisions ▼
- All comments and decisions
- Daily digest
- Decisions
- Disabled
- Final decision
- Hourly digest
- Replies to my comments

6. Define a deadline for the review process.

OPTIONS



7. Selecting the **Only one decision required** option indicates that if one approver has approved the proof the proofing session will close, otherwise, all approvers must approve the proof for it to close.
8. Ensure that the **Sync decisions to the file's discussion feed** option is selected to include the decisions relating to the proof process in Clarizen's social module.
9. Click **OK**.
An email is sent to all reviewers and the file viewer changes to the Proofing view.

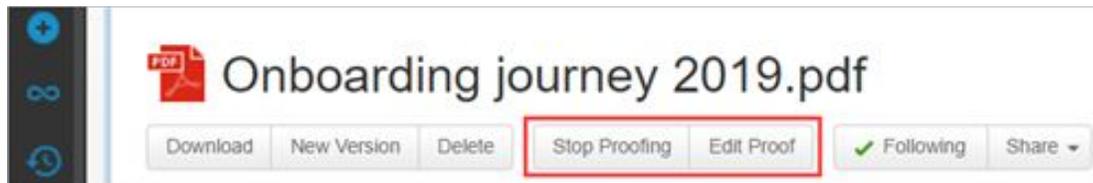
Note: For customers with proofing integration enabled, the maximum allowed file size is 1.3GB. Uploading a large file requires considerable processing time for the proof file to be created.

Managing a Proof

During the proofing process the proof owner can:

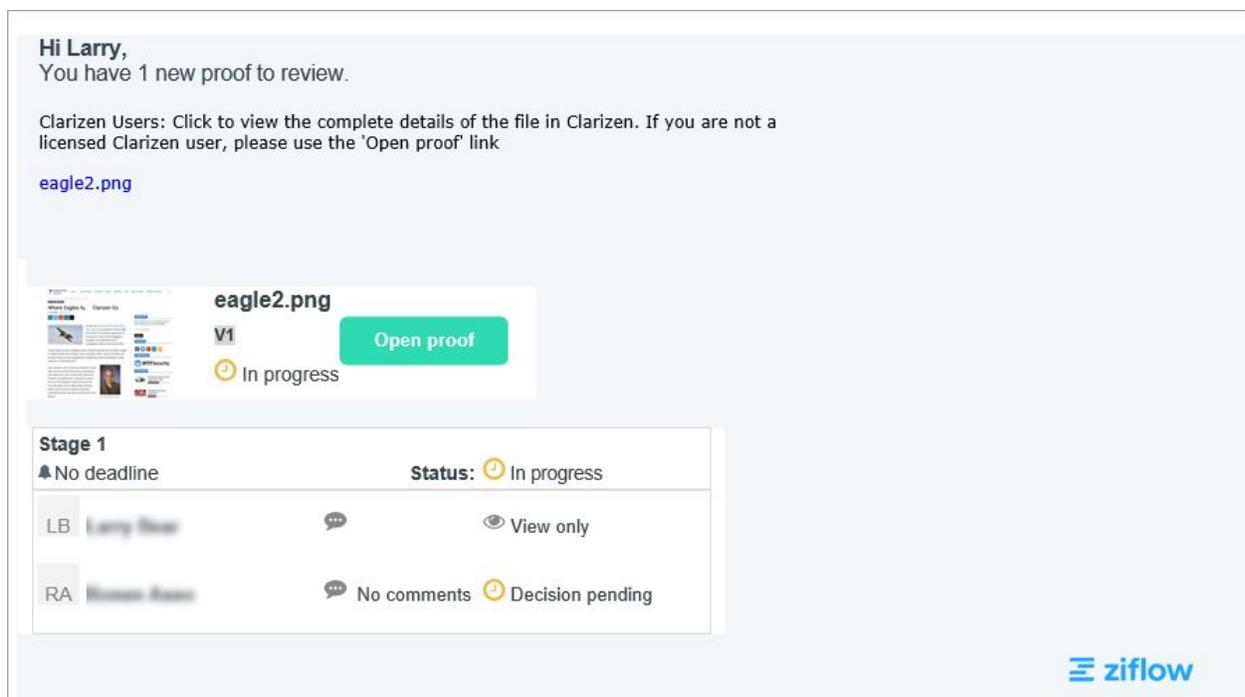
- **Edit the proof** — You can add or Remove reviewers, change their role or email notification settings, and change the deadline or review options
- **Upload a new version** — Upload a revised version of the proof
If you added reviewers to the new version they will be able to review only the new version of the file.
Once a new version is created, reviewers can compare the various available versions as part of their review.

- **Stop Proofing** — The proof will stop automatically once the proof has been approved.



Reviewing and Approving Proofs

When a proof is created, an email is sent to all of the reviewers.



Click on the attachment link to review the proof in Clarizen. External collaborators can click **Open Proof** to review in the Ziflow app.

The proof view consists of several panes:

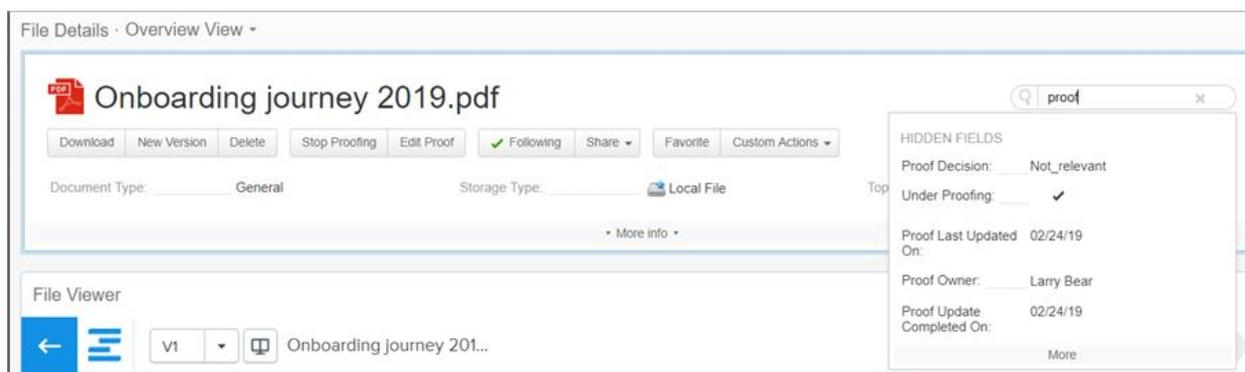
- [File Properties](#)
- [Proof Overview](#)
- [Proofing a File](#)
- [Discussions](#)

File Properties

In the File Properties card, you can start, edit and stop the proof, as well as add a new version of the proof.

You can also locate the various proof details if they are exposed or by using search. These include:

- **Under Proofing** — Displays a checkbox when the file viewed is marked for proofing
- **Proof Owner**
- **Proof Last Updated On** — Displays the date on which the proof was last updated with comments and decisions or when the proof was last edited
- **Proof Decision** — Displays the decision made on the proof



Proof Overview

The Proof Overview pane gives you a glance view of the proof status.

3 Reviewers

Decision: Not relevant Progress: S O C D Version: 1 Deadline: -

Name	Progress	Role	Decision	Email Notification
Test Uzver	S O C D	View Comment Decision Manage	-	All comments and decisions
David Goulden	S O C D	View Comment Decision Manage	-	Disabled
Eugene Pavly (owner)	S O C D	View Comment Decision Manage	-	All comments and decisions

- **Decision** — Displays the current status of the proof

- **Progress** — Displays the overall progress status using color coded letter icons.

The overall progress is based on the "weakest" reviewer, for example a proof was created with three (3) reviewers with review and approve roles.

All three reviewers opened the proof, two of the reviewers made comments and only one of the reviewers made a decision. The icons displayed will show the S and O icons in Green since all three have received a notification and opened the file, however the overall progress bar will not show the C and D icons in green since there is still one person who has not placed comments and the Decision is pending two reviewers.

You can view the status for each reviewer in the detailed review pane.

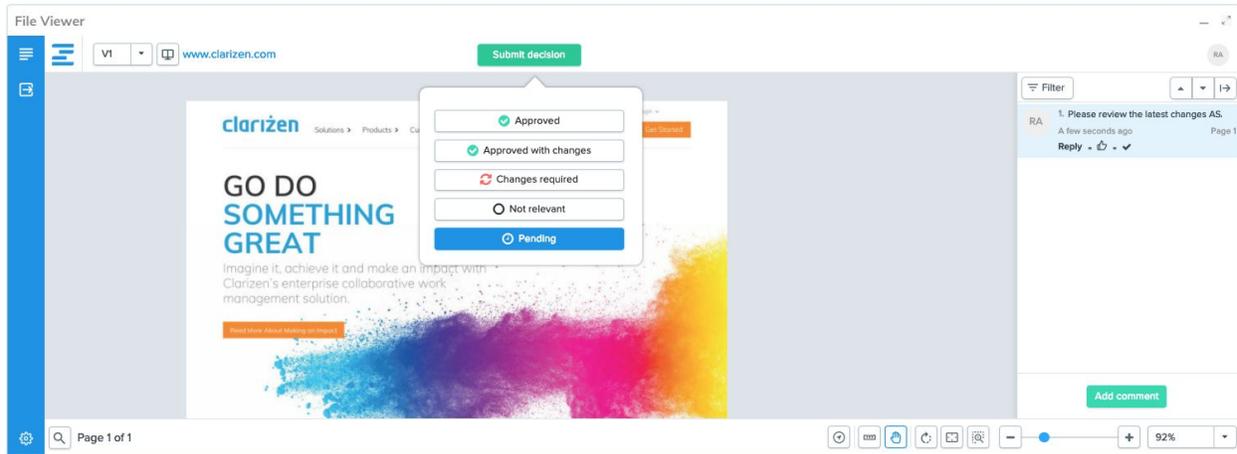
- S = Sent — The proof was created and sent out to the assigned reviewers
- O = Opened — The proof file was opened either from within Clarizen or from Ziflow
- C = Comments made — One (or more) reviewers made comments on the proof
- D = Decision made —An approver made a decision regarding the proof

The following colors indicate that:

- Gray = incomplete
- Green = complete
- **Version** — Displays the proof's version number
- **Deadline** — Displays the date defined as the proof deadline (the date is in the UTC timezone)
- **Detailed Review Pane** — Displays a detailed view of all reviewers, which includes the following information:
 - **Name** — Displays the names or emails (in case of external reviewer) of all assigned reviewers
 - **Progress** — Displays the progress indicator icons for the individual reviewer
 - **Role** — Displays the role assigned to the reviewer.
 - **Decision** — Displays the decision made by the individual reviewer (if assigned an approver role)
 - **Email Notification** — Displays the reviewer's email notification setting for the individual reviewer

Proofing a File

The Proof View includes a preview of the file being proofed.



Depending on your permissions, you can add comments and submit decisions directly from the File Viewer.

After taking an action such as commenting or submitting a decision, you can see the updated status icons in the Proof Overview window.

To create a new version, click **New Version** in the File Properties pane.

The 'New Version' dialog box is shown with a close button in the top right corner. It contains the following sections:

- Enter URL:** A text input field with an 'Open Page' button to its right.
- Proof Reviewers:** A section with the text 'All reviewers will be notified by email'. Below it is a table with columns for Name, Role, and Email alerts. One reviewer, 'Ronon Aseo' with the role '[owner]', is listed. Under the Role column, there are checkboxes for 'View', 'Comment', 'Decision', and 'Manage', all of which are checked. Under the Email alerts column, there is a dropdown menu set to 'All comments and decisions'.
- Add reviewer:** A section with a plus icon and a text input field.
- Options:** A section with a 'Decision deadline' field, a calendar icon, and three checkboxes: 'Lock the proof when all decisions are made' (checked), 'Only one decision required' (unchecked), and 'Sync decisions to the file's discussion feed' (checked).
- Proof Message (Optional):** A large text area for entering a message.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

You can switch versions in the viewer and compare versions.



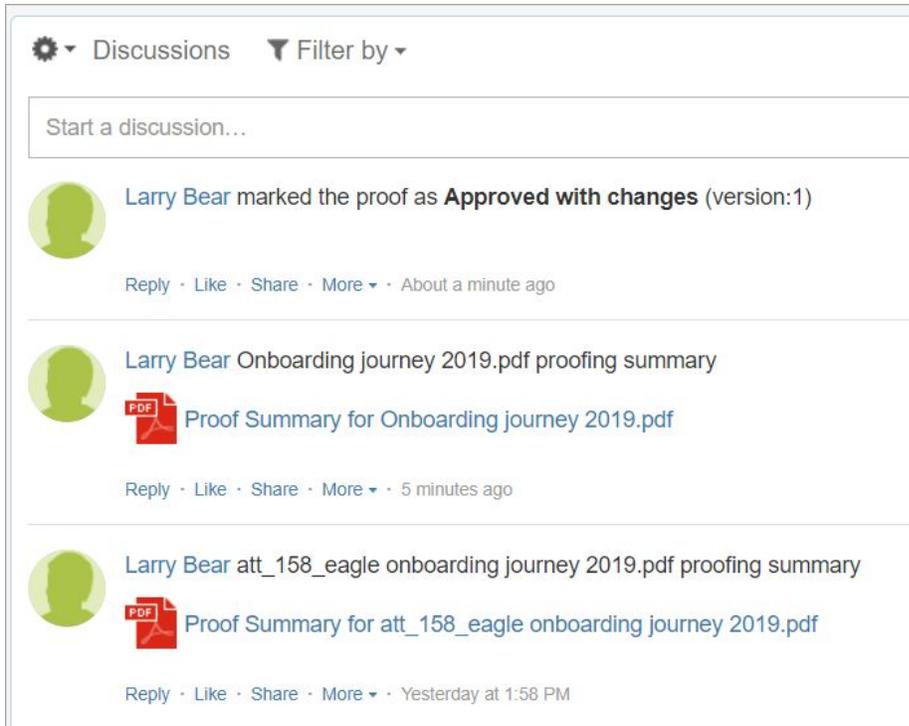
The compared view



Discussions in Social Feeds

The following items are added to the Discussions feed:

- Decisions added to the proof
- When the proof is closed, a PDF file with a summary of proof history



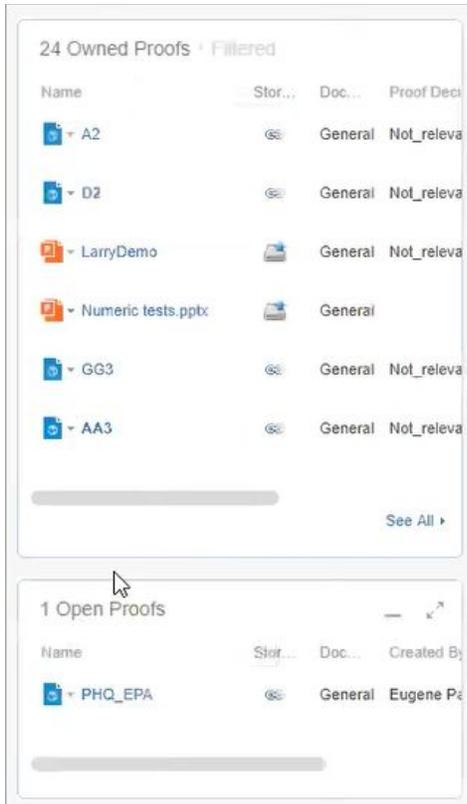
Stopping Proofs and/or Approving a Version

When you stop a proof or approve a version of a proof:

- The last version of the proof remains in Clarizen and can be viewed in the File Viewer. You can still access previous versions after unlocking them in the Ziflow app.
- A PDF with the history of the proof is saved in the **Discussions** panel.

Proofing Widgets for Users

A user's owned and open proofs can be viewed in the Related Items panel of the user's settings.



Owned Proofs are displayed by default.

Open proofs can also be displayed, however your Admin must add the panel to the user's Profile.

To add Open Proofs:

1. Select the Profile under **Settings > Profiles**.
2. Select **Users and Resources > Groups and Users > User**.
3. Open **Fields & Relations > Related Items**.
4. Add *Open Proofs* to **Your Selections** and click **OK**.

- Discussion Message
 - Expense
 - Expense Sheet
- Files
- Ilan 1
- License
- Organization
- Product
- Rate Card
- Reports And Dashboards
 - Reports Folder
 - Requirement
 - Timesheet
- Topic
- Users And Resources
 - Groups And Users
 - Group
 - Job Title
 - Skill
 - User**
 - Non-Labor Resource
 - Vendor

User

3 Fields & Relations Define and manage fields and relations [Learn More...](#)

4 Profile Fieldset

Related Items

Actions

Field Layout

Default Views

Search Defaults

Related Items

Available

Search: proof

<input type="checkbox"/>	Name	New by ...
No items found		

Your Selections

<input checked="" type="checkbox"/>	Name	New by Default
<input checked="" type="checkbox"/>	Open Proofs	
<input type="checkbox"/>	Groups	
<input type="checkbox"/>	Skills	
<input type="checkbox"/>	Managed Projects	
<input type="checkbox"/>	Assigned Work Items	
<input type="checkbox"/>	Assigned Cases	
<input type="checkbox"/>	Reported Timesheets	
<input type="checkbox"/>	Direct Reports	
<input type="checkbox"/>	Discussions	
<input type="checkbox"/>	Notes	
<input type="checkbox"/>	Files	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Owned Proofs	
<input type="checkbox"/>	Rates	

>> <<

All Items per page

Automating Proofs with Configurations

You can automate a number of proofing actions using Clarizen One [Configurations](#), specifically Workflows, Scheduled Workflows and Custom Actions. In Set Actions, the two proofing actions are **Manage Proof** and **Set Proof Reviewers**.

Examples:

- **Create a Workflow Rule on a File object to start a proof when a record is created.**
Run on the *CurrentObject* (record) and use the **Manage Proof** action to start a proof. Optionally add proof details such as a deadline, include in Discussions, etc.

The screenshot shows the 'Set Actions' configuration page for a 'Manage Proof' action. The interface includes a header 'Set Actions' and a list of actions with a '1' icon, 'Manage Proof' dropdown, and 'Delete' button. Below the action list, there are several configuration fields: 'Run On: CurrentObject Change...', 'Action: Start/Edit Proof (selected) Stop Proofing', 'Execute on behalf of: CurrentUser Change...', '\$File*' = CurrentObject(), '\$Deadline (Optional) =', '\$Only one decision required (Optional) =', '\$Sync decisions to discussion feed (Optional) =', and '\$Enable auto lock (Optional) ='. Each field has a corresponding text input area.

- **Create a Custom Action to add reviewers**
Select the **Set Proof Reviewers** action on the *CurrentObject*. Define the file, reviewers, and optionally, define additional reviewer roles and custom emails to the reviewers.

Set Actions

1 Set Proof Reviewers Delete

Run On: CurrentObject Change...

Action: Add/Edit Reviewer Remove Reviewer

Execute on behalf of CurrentUser Change...

\$File* = Required

\$Reviewer* =

Role* =

View Comment Decision Manage

\$Email alert* =

Known Limitations

The following options that are available in the native Ziflow app are currently not supported in the Ziflow-Clarizen One integration:

- **Proofing live website pages:** The integration supports proofing snapshots of web pages. Proofing a live version of a website is currently not supported.
- **Multiple Stages:** Ziflow workflow templates with configurable stages are not supported. All updates to proofs will be included in the first stage.
- **Final Status Calculation:** The integration supports *All decisions* and *Only one decision required* options. The additional option to specify the user that made the decision is not supported.

Migrating from ProofHQ to Ziflow

If you are using ProofHQ and want to move over to Ziflow, please contact your Clarizen Customer Success Manager.

When you change the proofing method in Clarizen, all active proofs using the original method will stop.