Producer 20

Toon Boom
Producer 20
User Guide

Legal Notices

Toon Boom Animation Inc.
4200 Saint-Laurent, Suite 1020
Montreal, Quebec, Canada
H2W 2R2

Tel: +1 514 278 8666
Fax: +1 514 278 2666

toonboom.com

Disclaimer

The content of this document is the property of Toon Boom Animation Inc. and is copyrighted. Any reproduction in whole or in part is strictly prohibited.

The content of this document is covered by a specific limited warranty and exclusions and limit of liability under the applicable License Agreement as supplemented by the special terms and conditions for Adobe®Flash® File Format (SWF). For details, refer to the License Agreement and to those special terms and conditions.

Some icons in this document were provided with Font Awesome Free 5.6.1 by Font Awesome. These icons are provided under the CC BY 4.0 license. For more information on Font Awesome, visit https://fontawesome.com. For information on the license of Font Awesome Free, see https://fontawesome.com/license/free.

Some icons in this document were provided with the Glyphicons Halflings font by Glyphicons. For more information on Glyphicons, visit https://www.glyphicons.com/.

Trademarks

Toon Boom® is a registered trademark. Producer™ and the Toon Boom logo are trademarks of Toon Boom Animation Inc. All other trademarks of the property of their respective owners.

Publication Date

03-11-2021

Copyright © 2021 Toon Boom Animation Inc., a Corus Entertainment Inc. company. All rights reserved.

Contents

About Producer

With increasing global demand for original animated content, and productions being produced from different sites worldwide with more and more work from home, there is a growing need for tools that ensure efficient production development. Studios everywhere have relied on spreadsheets and DIY solutions to help keep teams aligned, and move productions forward along timelines and within budgets.

Producer 20 provides real-time access to the progress of your animated features and series, making it easier to manage global production processes. Track tasks, assets, scenes, production progress, team management, efficiencies across departments, reporting and more. Plus, Producer seamlessly integrates with the software your team needs to get the job done including Storyboard Pro and Harmony.

Our all-in-one production management and tracking tool provides global visibility of your studio's activities, giving you access to up-to-date information and enabling you to make the best decisions at the right time.

Benefits

- Measurable increases in studio production efficiency

- On-time and on-budget feature and series delivery, enabling massive savings

- Real-time visibility of full production pipeline for quick and efficient decision making

- Reporting for all levels of studio management

- User-friendly interface makes learning easy

- Backed by the industry's leading 2D animation software company who understands the needs of global studios

- We are accessible, with support and our community being our focus — a leader in 2D animation for over 25 years

- Seamless integration with industry-leading 2D animation production (Harmony) and storyboard software (Storyboard Pro)

- Multi-production environment in one global platform

- Advanced potential for team collaboration, effective communications and task delegation
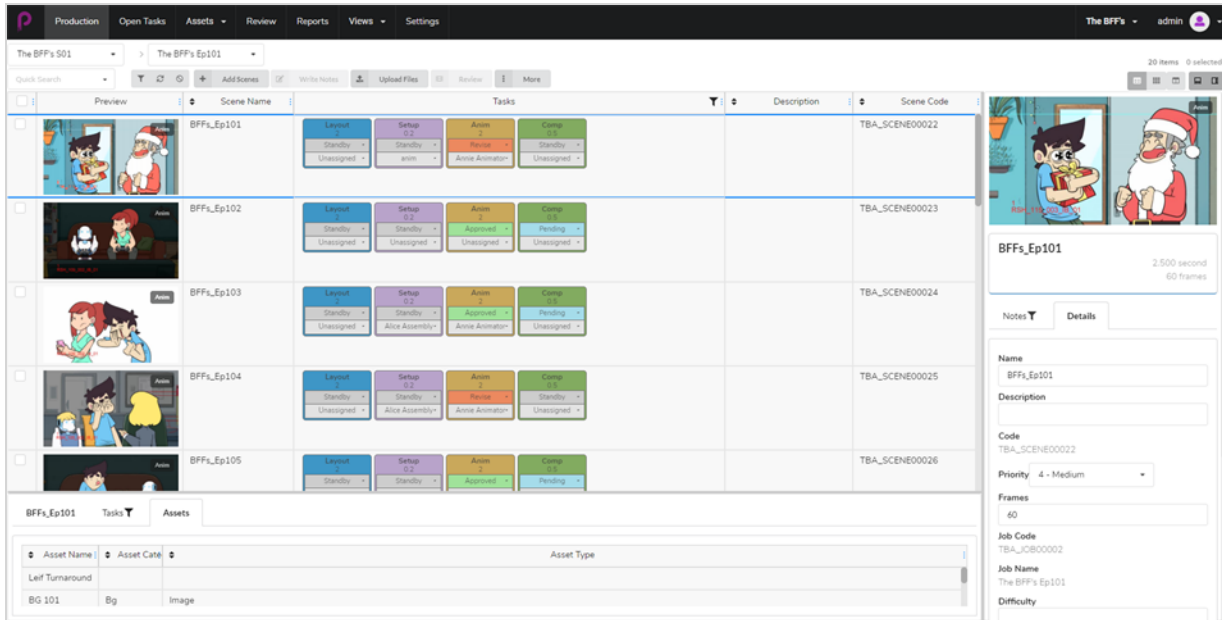
Features

- Customizable workflows, user profiles and roles

- User-friendly interface

- Dashboards and detailed reporting

- Job task reports

- Progress report

- Team productivity reports

- Access to in-app analytics and graphs

- Graphical scene status dashboard

- Customizable & Automated triggers

- Advanced filtering of projects, tasks, scenes, searches and more

- Versioning

- Potential for multi-production tracking

- Scheduling & gantt charts

- Central Hub for connectivity of every team member

- Notes and annotations

- Task, scene and asset assignment

- Asset categorization, labeling and tags for simplified search

- Thumbnails and preview videos for easy access

- Assets assembly and scene set up in Harmony

- Third-party software integration

- Batch import and export to CVS

- Advanced reporting: task reports, progress reports, team productivity, and more

- Multi-language interface (English, French, Spanish, Japanese, Standard Chinese)

- Available for deployment on premises or on the cloud

User Guide

The following guide explains how to use all the core functionalities of Producer. It is addressed to all kinds of project contributors, depending on the task they wish to accomplish.

Chapter 1: About the Interface

Producer has many pages, tabs, views and buttons that allow you to organize and manage your production workflows.

You can navigate the main sections and features available in Producer through the top menu.
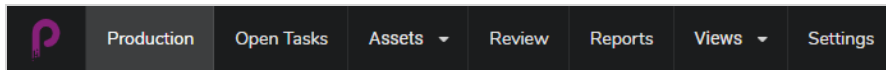
Page	Description
	Goes back to the Project list home page.
Production	Allows supervisors and directors to track the progress of episodes, scenes, tasks and manage workloads.
Open Tasks	Allows a user to see the work assigned to them and update their tasks as well as logging work hours.
Assets	Allows supervisors and directors to track asset tasks and manage assets.
Review	Allows supervisors and directors to review submitted scenes and assets, approve tasks, add notes, and send work for retake.

| Page	Description
Reports	Allows supervisors, directors, and producers to analyze data and progress through a variety of customizable reports.
Views	Allows users to create and share custom views with custom columns.
Settings	Allows administrators to configure Producer by creating users, setting permissions and groups, creating workflows, and managing projects.

> **NOTE**
>
> Users will have access to different pages and menu items based on their level of permissions—see Creating Users.
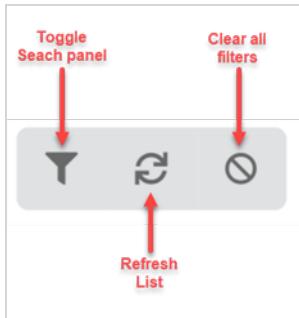
Production Toolbar

A lot of the operations in the Production and Asset pages are perform through the Production toolbar.
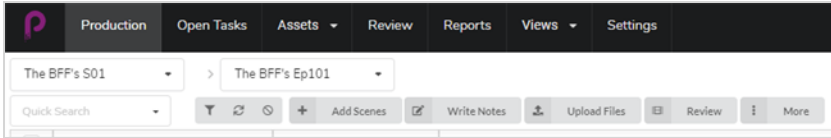
Search and Filtering Tools

You can use the Search field and filtering tools to only display scenes and assets matching specific criteria.

View Tools

You can change the display style of the Production and Asset tables to include more or less information such as opening the detail side panel or changing the view style to thumbnails.
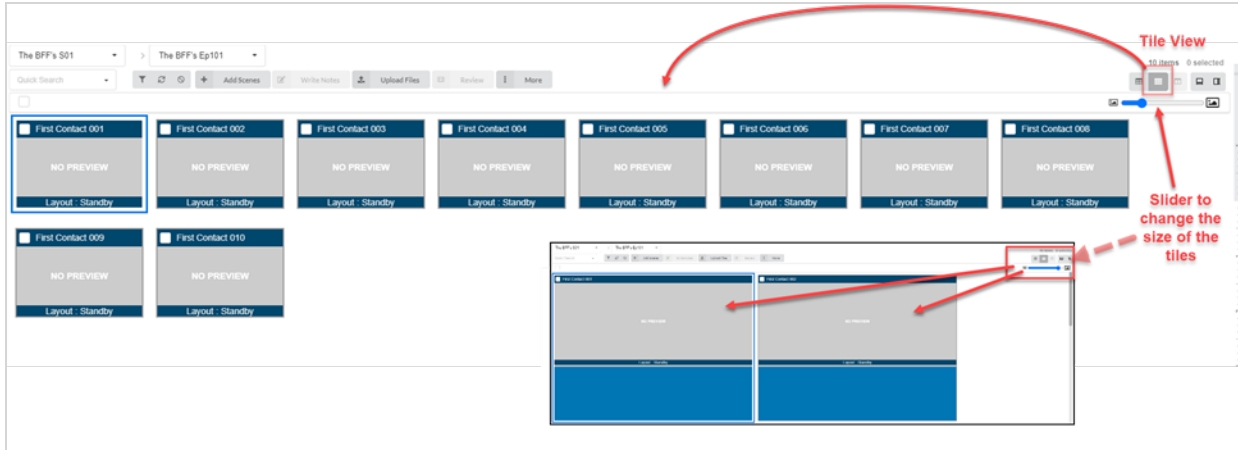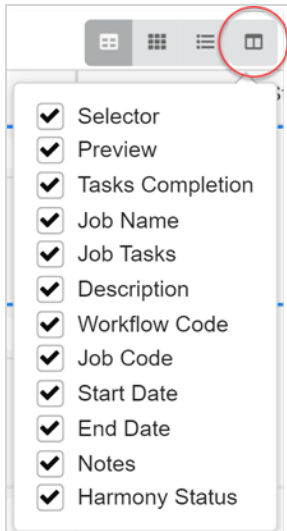
List button

Tiles button

Column Selector

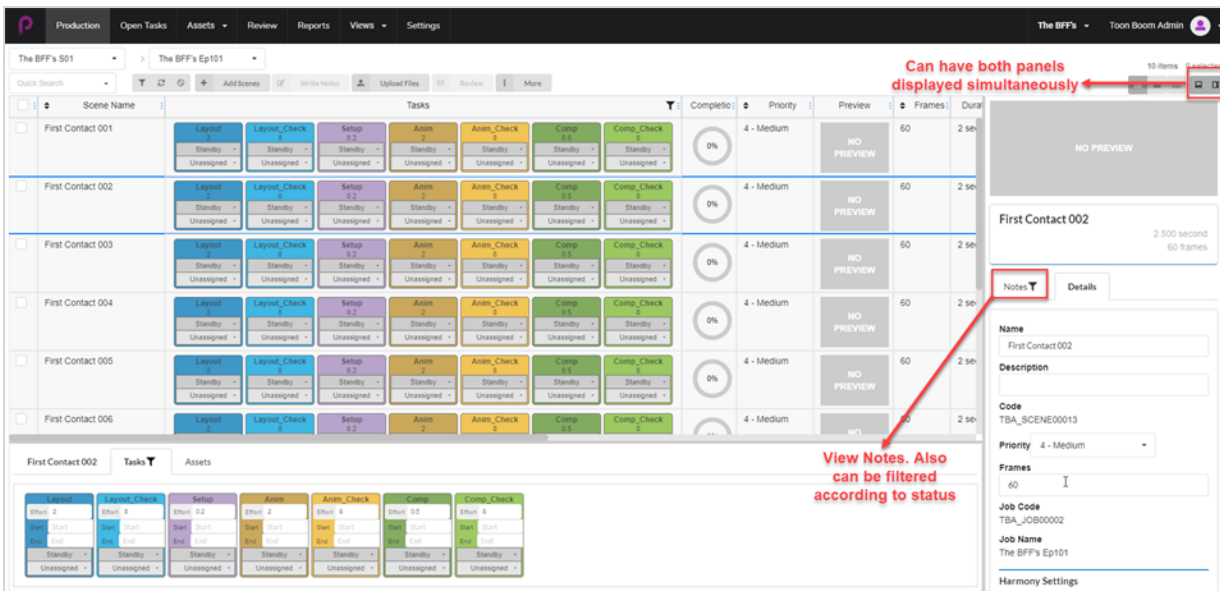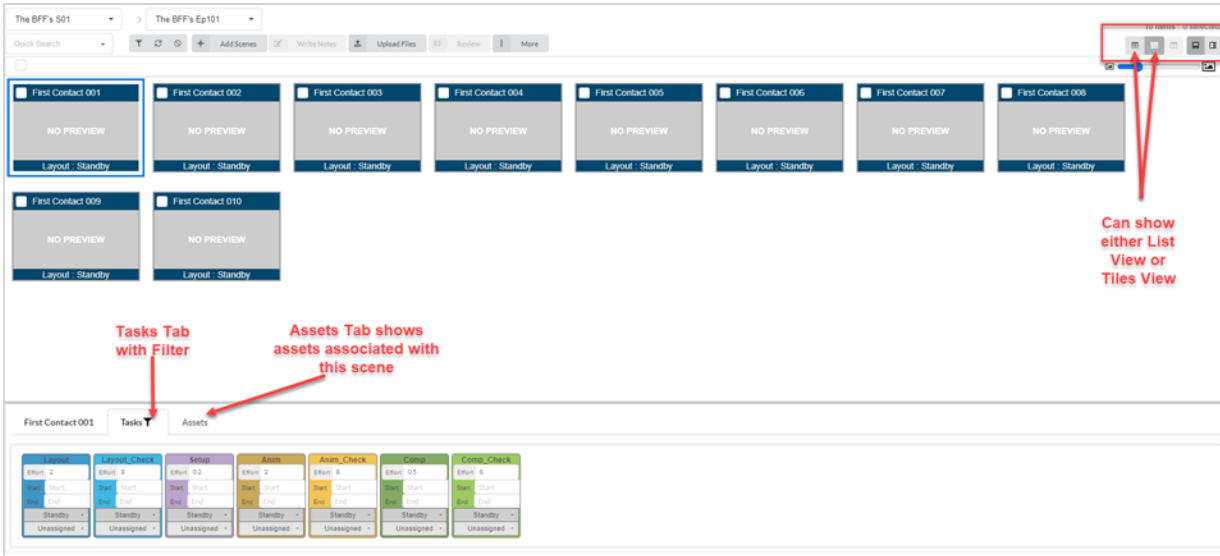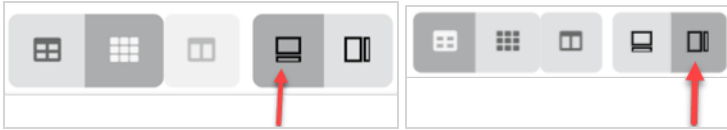With the Column Selector you can choose how many columns are displayed in your main list. Uncheck the boxes on the ones you wish to hide.

Toggle Bottom and Side Panels

You can display additional information for each selected job, scene or asset using the side and bottom panel.

Additional Options for Selected Items

When you enable the checkbox on a Job, more options are available to edit your selection.
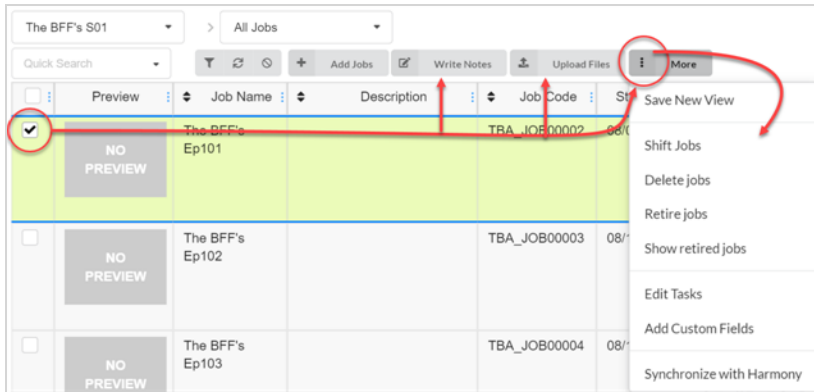
Adding and Removing Columns

Depending on your workflow needs, you can add and remove columns from the production or asset list.

How to add and remove columns

1. In the top menu, click **Production** or **Assets > Manage**.
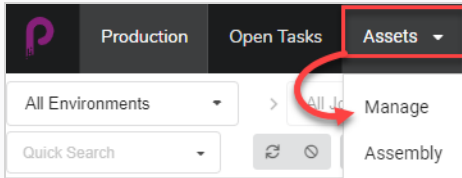
   The assets list opens.

2. In the toolbar in the top-right corner above the assets list, click on the Manage Columns ▭ icon.

   A menu appears with all the available column options for the asset list. Columns that are currently displayed in the list are checked, and those that are hidden are unchecked.
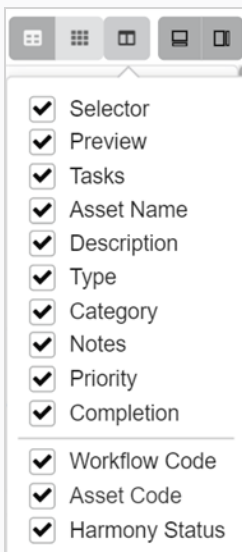
3. Check each column box that you wish to add, and uncheck each column box that you wish to remove.

   When adding columns, the newest column added will by default appear on the right.

   > **NOTE**
   >
   > You should always keep the Selector column enabled. This column contains a checkbox for each asset, allowing you to perform certain actions and select several assets simultaneously.

Creating Views

You can create custom views and share them with users to display the Production or Asset list using a specific set of columns and filtering options. You can create as many views as needed.

How to save a custom view

1. Select **Production** or **Assets > Manage**.

2. From the page toolbar, click on the Column Selector ▢ icon.

3. Check or uncheck any boxes of columns you wish to display or hide.
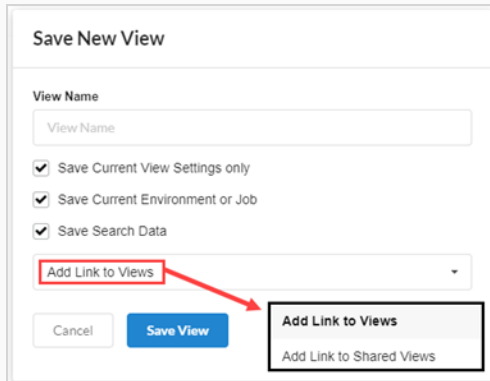
    > ✎ **NOTE**
    >
    > The order of the tabs will be displayed from left to right as you check the boxes in that order. You can edit this later by grabbing the name in the column header and sliding it left or right to switch the order.

    More custom fields can be entered using the Toggle Search Panel.
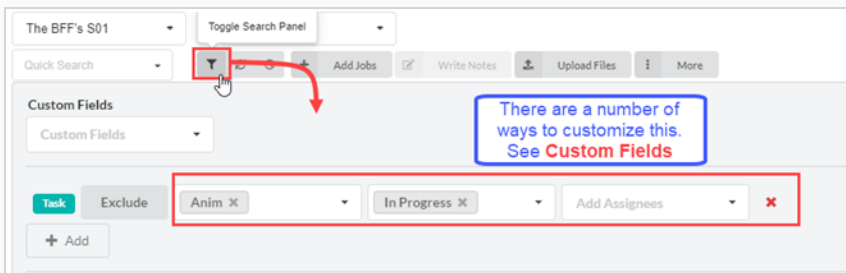
4. When finished, in the page toolbar, go to **More > Save New View**.

    The Save New View window opens.

5. In the Name field, type in a name for the new view.

6. Check or uncheck the following options:

    - **Save Current View Settings Only**: saves the columns and ordering of columns in the view.

    - **Save Current Environment or Job**: save the current location of the view.

    - **Save Search Data**: saves the search data.

7. In the drop-down menu, select one of the following:

    - **Add Link to Views**: adds the link to views that you can only see.

- **Add Link to Shared Views**: adds a link that everyone in the production can see and use.

8. Click **Save View**.

   Under Shared Views in the Views tab you will see the shared views from the current production.
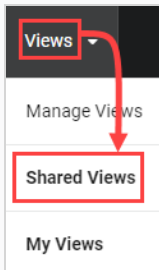
   Under My Views from the Views tab you will see your personal saved views from the current production.
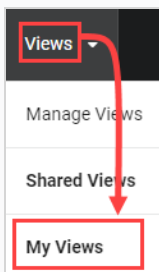
Managing Views

Once you have created custom views, you can manage them to remove them or manage the sharing settings.

How to manage views

1. Select **Views > Manage Views**.
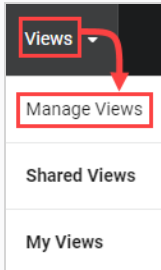
    My Saved Views and Shared Views appears.

2. In the Saved Views section, right-click on a saved view.

    The option menu opens. If you click directly on a saved view, it will open immediately.
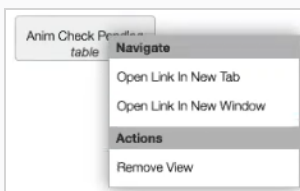
3. You can drag and drop saved views into the Shared Views section for everyone in the production to see and use.

Chapter 2: About Users and Permissions

Anyone using Producer on a regular basis should have their own login credentials. This allows permissions control as well as task assignment and effective communication within Producer. Note that the permissions are handled through groups, for better efficiency. A user can be part of many groups and has all the rights permitted to these groups.

A group has two primary functions. First, it serves to assign permissions to its members, within the context of a project. Second, groups can be used to facilitate task assignments. For example, if you 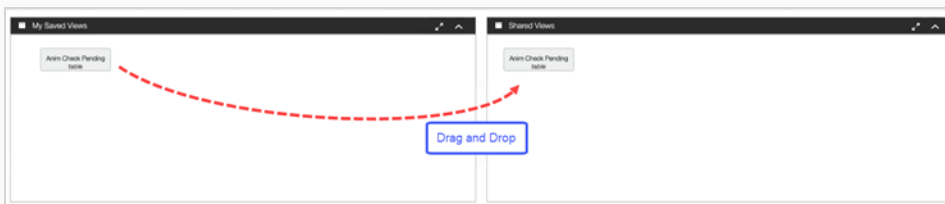specify that the Animators group are the usual assignees for the task "animation" then the animation supervisor will only have to chose among users that are part of the Animators group when assigning an animation task.

> **NOTE**
>
> Only users with Administration permissions will be able to create users, manage groups, and set permissions.

Users, groups, and permissions can be access via the Settings page.
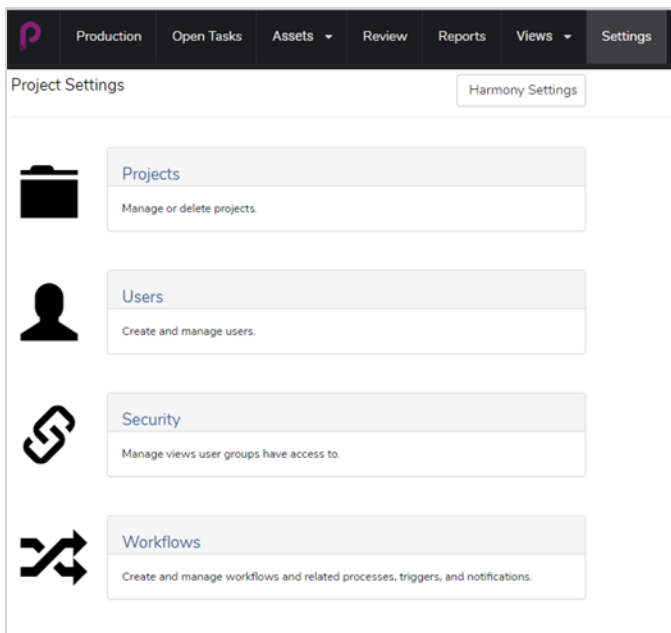
The Security section allows the Admin user to set permissions for groups, page access, project access, task access, and menu item access such as creating, deleting, or archiving.
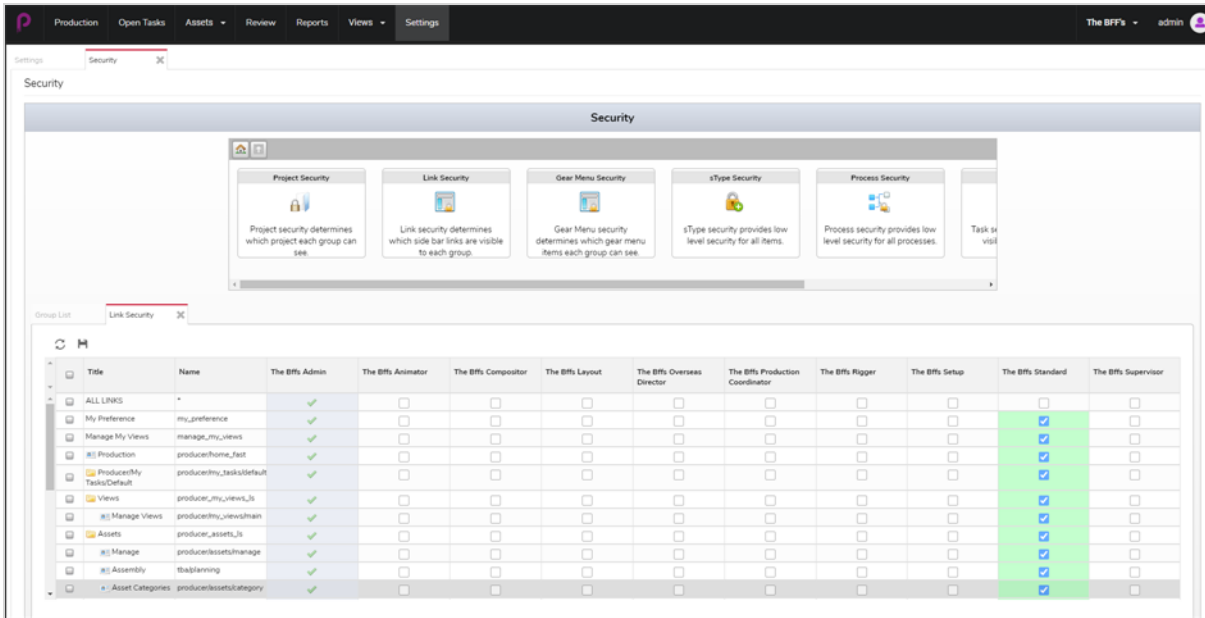
The Users section allows the Admin user to create new users and assign them to groups.
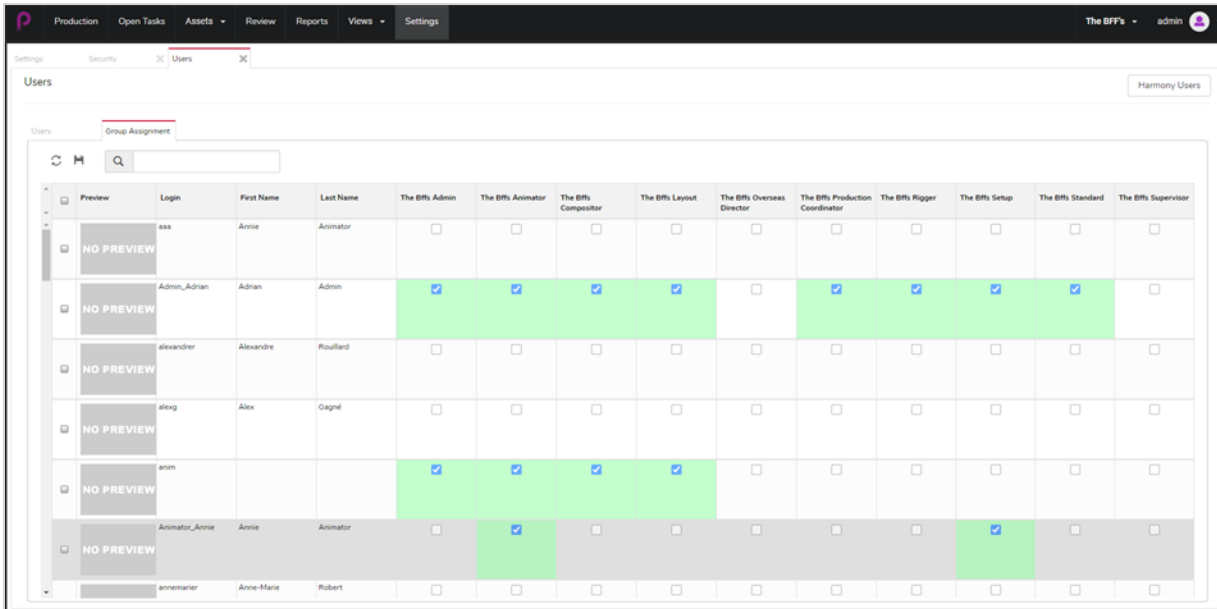
Creating Users

You can assign certain users permission to access part of Producer, while restricting the use of certain features for others.

How to add a user

1. In the main menu, click on **Settings**.

2. In the Settings tab, select Users.
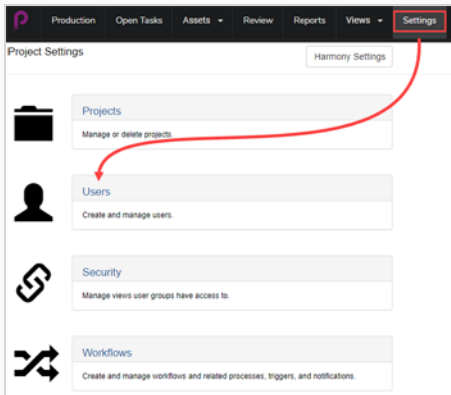
The Users tab opens.

3. In the second User tab, click on the **Add** button.
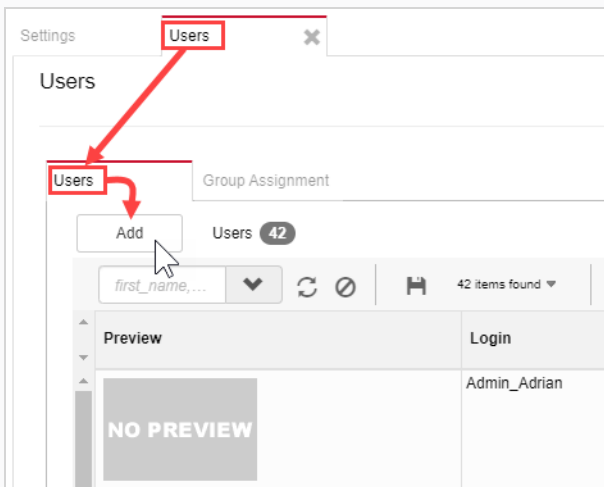
The Create New User window opens.

4. Enter all the information for the new user.

5. When finished, click the **Add** button.

Editing and Adding Users to Groups

Once a new user is created, they can have their preferences created or changed. They can be found on the same user page. Within that you can change or view preferences/groups as well as view metadata.

Preview	Login	First Name	Last Name	Display Name	Activity	Groups	Security	Edit User
NO PREVIEW	Joe_Smith	Joe	Smith	Joe Smith				

Change or View preferences/groups here, also view metadata

Groups

Add the user to specific groups within the production. Each group has a different set of restrictions.
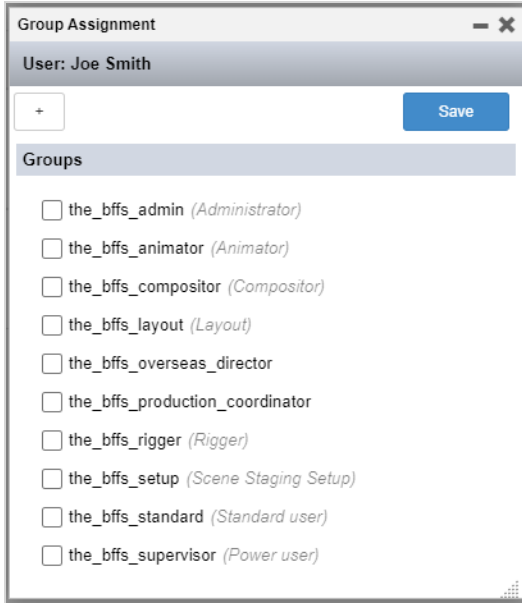
Edit User

Allows you to edit the user profile and login credentials.

Chapter 3: About Workflows

In Producer, production tracking is based on workflows. It is a multi-stage process usually involving several different software. While there are commonalities, most animation studios will develop their own pipelines. Producer's ability to reproduce or create complex non-linear pipelines with its node based editor makes it most adaptable to an already established studio environment.
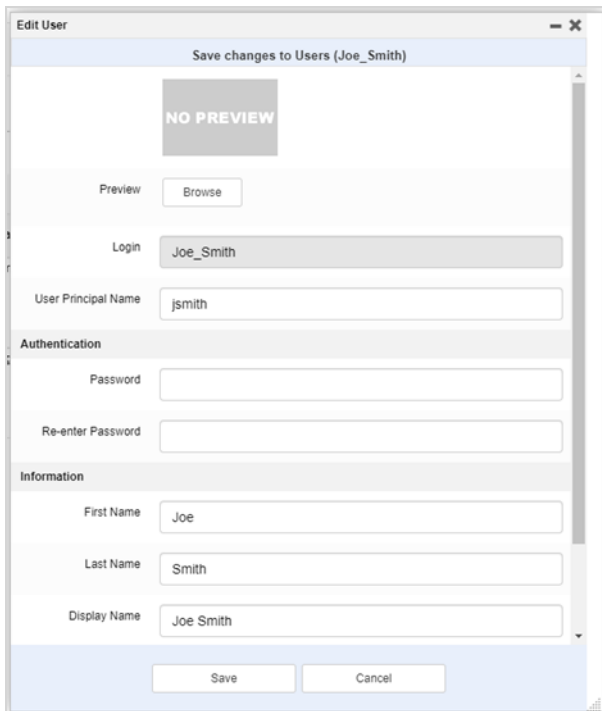
The term workflow can be used almost interchangeably with pipeline in Producer. The term workflow is also used for the actual node structures. A workflow applies to one type of production. For example, you may have a workflow to produce jobs, a different workflow to produce scenes, and another to produce a specific kind of asset such as bitmap backgrounds. These different workflows are made up of nodes that each represent a process. There can be as many workflows as needed. Producer comes with some ready-made workflows, however it is recommended that you use these as templates to create your own. Workflows are specific to projects, however they can be exported and imported from one project to another.
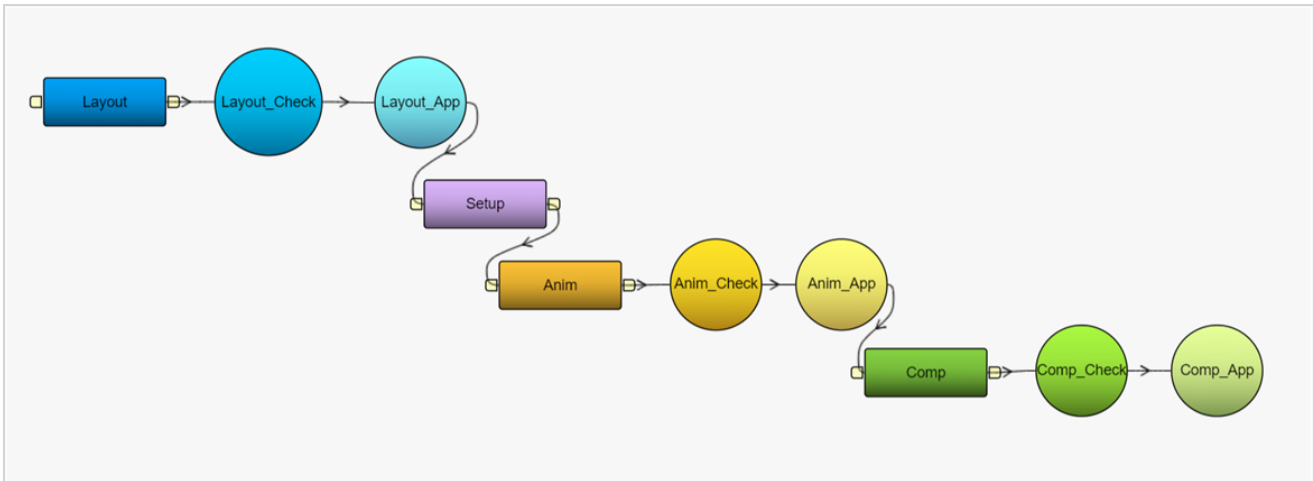
Workflows are blueprints to eventually create actual tasks that can then be assigned and tracked.

About Task Status Workflows

A task status workflow has a particular property. It's a workflow that can be applied to the task of another workflow. It provides different statuses for that task, letting users know the progress of that task.

> 📝 **NOTE**
>
> To find out how to link a task status workflow to a task—see Task Setup Options.

In the Basic Task Status workflow (a workflow that comes with Producer) there are seven possible options (Standby, Pending, Need Assistance, In Progress, To Validate, Revise, Approved).
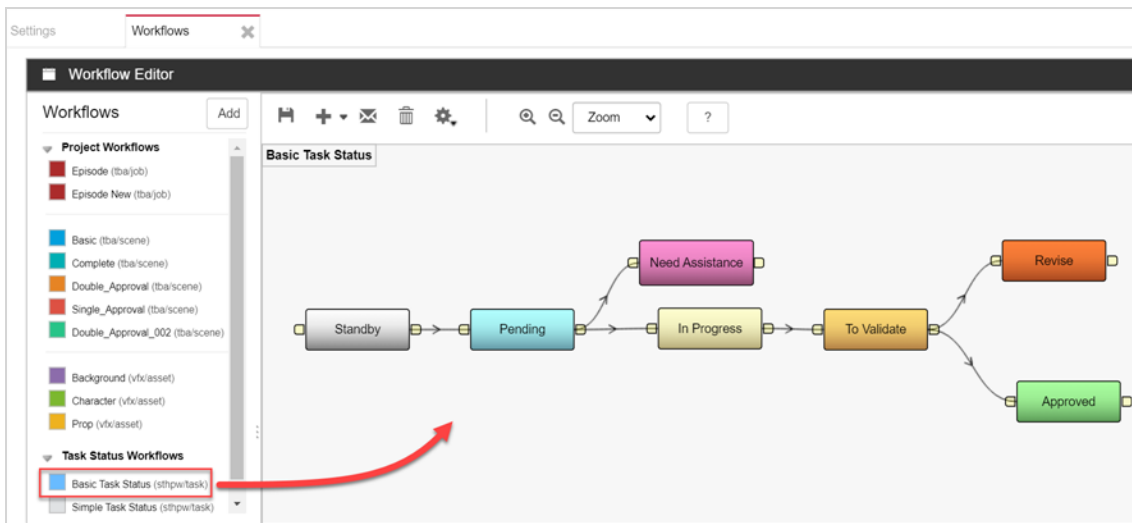
In the Production or Assets > Manage tab, when a user clicks on a task status, a drop-down menu lets them choose or update the status of that task from an option in the list.

About Included Workflows

Here is the list of workflows that are included with Producer, along with a brief description for each.

Episodes

Workflow to track jobs as episodes of a TV series.
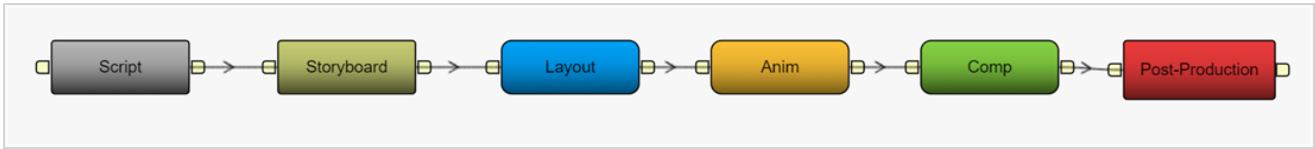
Basic

Workflow to track scenes in a simple manner.
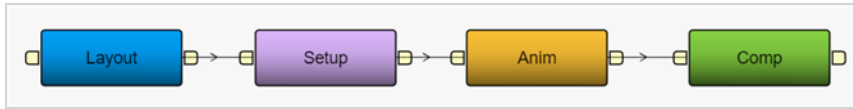
Complete

Workflow to track 2D paperless scenes, where the animation is hand-drawn digitally.
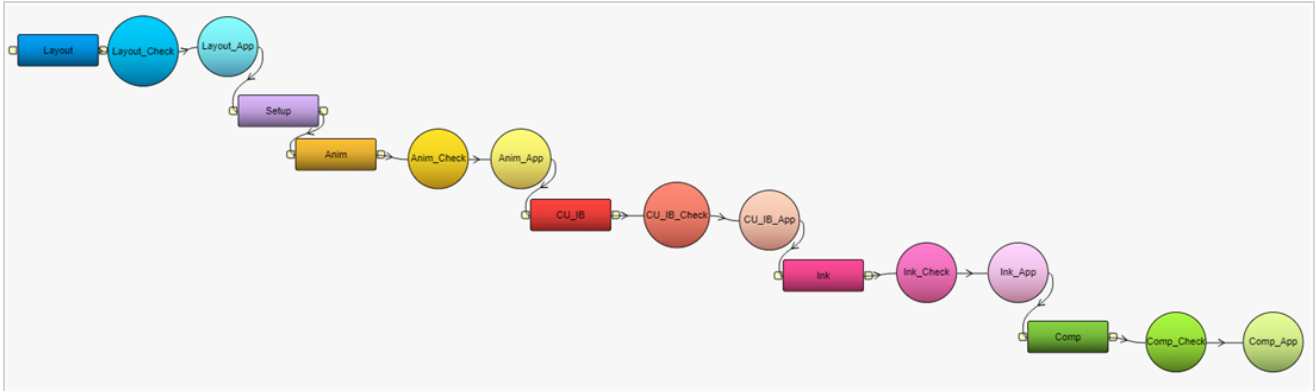
Double Approval

Workflow to track scenes, where the two approval stages are required for each necessary step in the process.
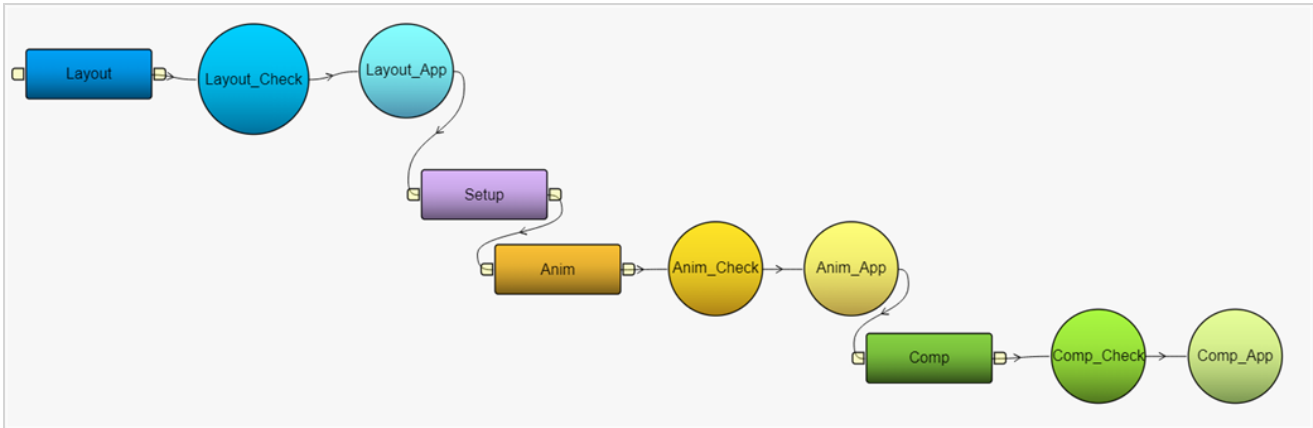
Single Approval

Workflow to track scenes, where a single approval stage is required for each step in the process.
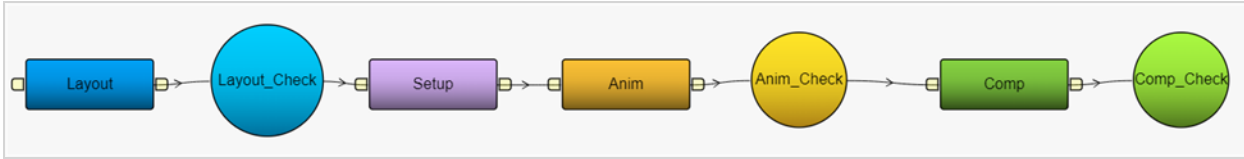
BG

Workflow to track the creation of bitmap backgrounds.
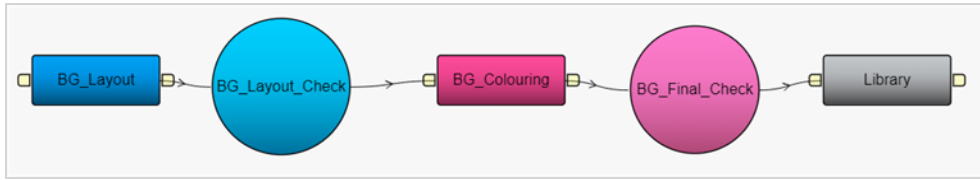
Character

Workflow to track the building of digital puppets (also known as character rigs).
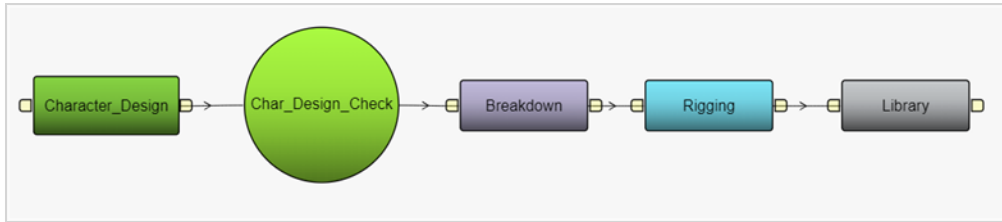
Prop

Workflow to track the building of digital props.
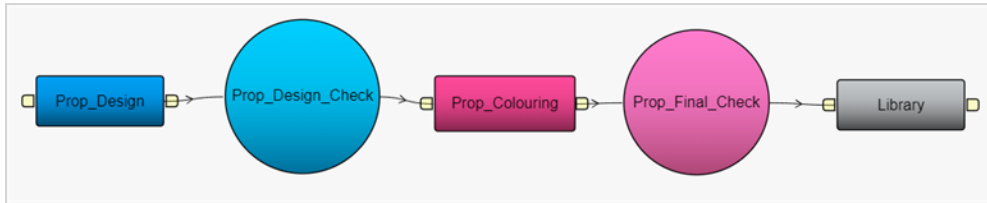
Basic Task Workflow

Basic Workflow providing statuses for the tasks of the other workflows.
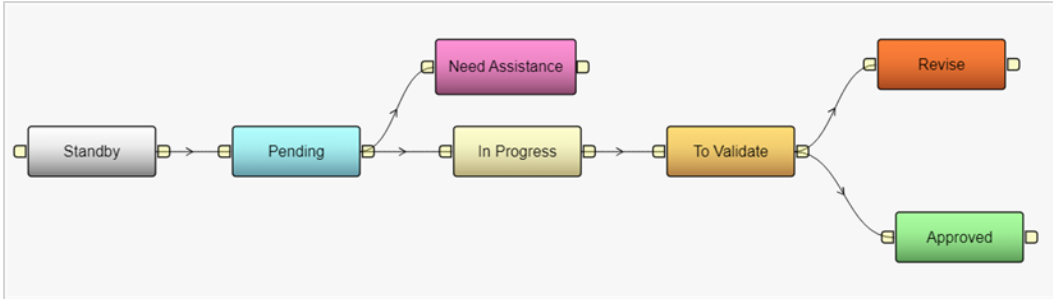
Simple Task Workflow

Simple Workflow providing statuses for the tasks of the other workflows. It is meant to track something that is completed without any type of revision or approval (ie: task done).
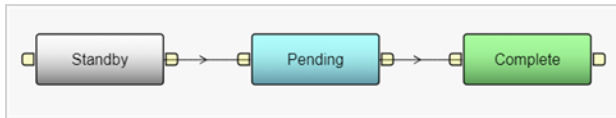
Duplicating Workflows

The workflows that are provided with Producer are useful templates to create your own. It is NOT recommended to use them directly as they may be updated and modified in future versions. Instead, duplicate and modify them to match your own pipeline.

How to duplicate workflows

1. In the main menu, select **Settings**.
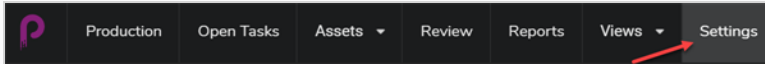
   The Project Settings are displayed.

2. Select the **Workflows** option.
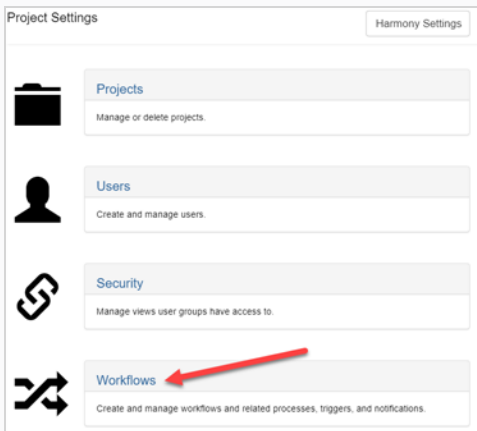
   The Workflow tab opens.

3. In the Project Workflows list, right-click on the desired workflow and select **Duplicate**.
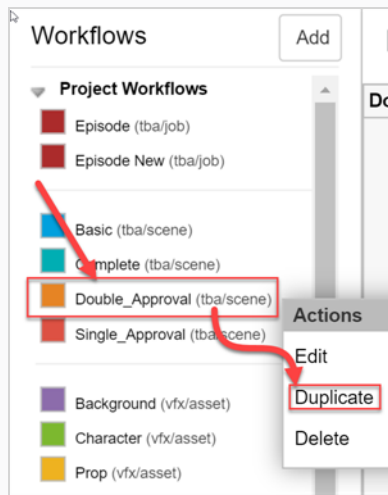
   The new workflow appears in the list.

4. Right-click on the new workflow and select **Edit**.

   The Edit Workflow Details dialog box opens.

5. In the Name field, enter the name of the new workflow.

6. In the Description field, type the workflow description

7. In the Search Type drop-down menu, select the type of item to which this workflow applies. For a scene, select Scene (tba/scene). For an asset, select Asset (vfx/asset).

8. In the Colour field, use the colour picker widget to select an identification colour.

   Then click **Select** to confirm the colour selection.
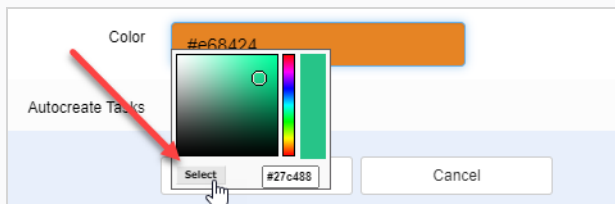
9. Leave the Autocreate Tasks option enabled (recommended). This means that when items are created using this workflow, the tasks will be created automatically.

10. Click **Save**.

Creating Workflows

Creating a new workflow includes a series of subtasks. To simplify the process, it may be a good idea to start from an existing workflow—see Duplicating Workflows.

To create a completely new workflow, follow this procedure.

> **NOTE**
>
> To add nodes to your workflow and connect them, see Adding Nodes to Workflows and Connecting Nodes.

How to create a workflow

1. In the main menu, select **Settings**.

    The Project Settings tab opens.

2. Select the **Workflows** option.

    The Workflows tab opens.

3. Click **Add**.

    The Add New Workflow dialog box opens.

4. In the Name field, enter the name of the new workflow.

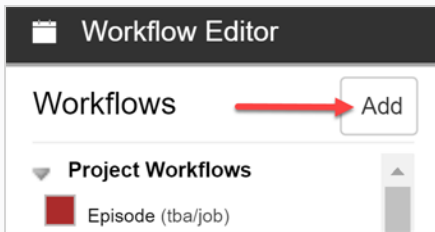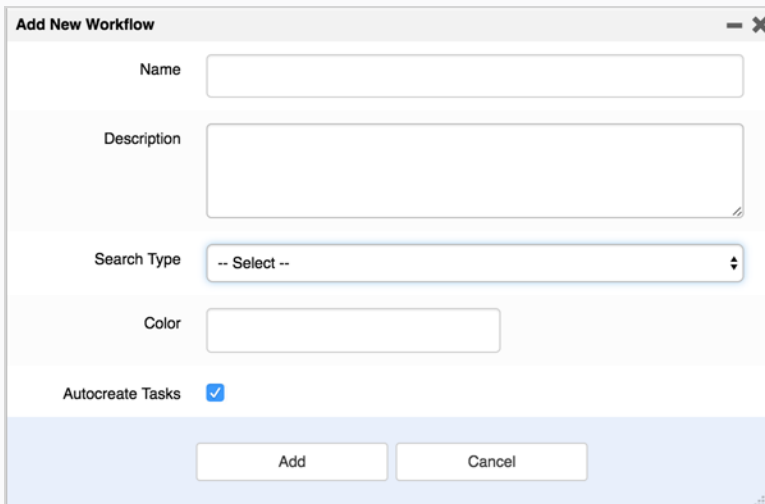5. In the Description field, type the workflow description.

6. In the Search Type drop-down menu, select the type of item to which this workflow applies. For a scene, select **Scene** (tba/scene). For an asset, select **Asset** (vfx/asset).

7. In the Colour field, use the colour picker widget to select an identification colour.

8. Click **Select** to confirm the colour selection.

> **NOTE**
>
> We recommend that you leave the Autocreate Tasks option enabled. This means that when items are created using this workflow, the tasks will be created automatically.

9. Click **Add** to create the workflow.

10. In the Workflows list, select the new workflow.

    The workflow appears in the editor.

11. Click on the **Create First Node** icon to create the first node.
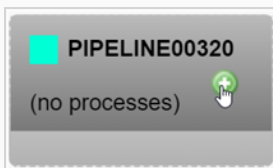
12. Right-click on the node and select **Rename Node**.
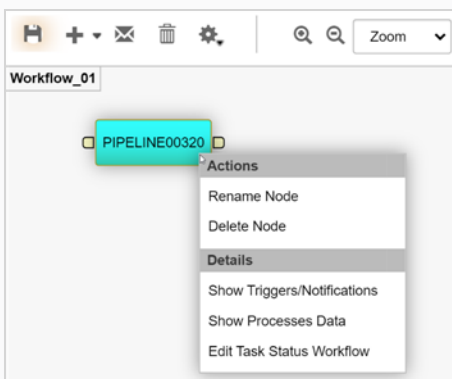
13. Type the new name. DO NOT USE SPACES. USE UNDERSCORES.

14. Press Enter to validate the name.

15. Click on the Save ![icon] icon to save the changes. The Save icon has an orange glow ![icon] whenever a change has been made to a workflow.

About Nodes

Each node in a workflow represents a process. When creating an asset or scene using a specific workflow, the nodes of this workflow are represented as tasks that can be assigned to users in the Production and Asset tabs. Nodes can be connected from one to another in a non-linear fashion. There are 5 types of nodes: Manual, Progress, Action, Condition, and Approval.

Manual

The Manual node is used for a process where the work is done by a person. This process can have different statuses. These statuses are linked by creating a Task Status workflow and assigning it to the node. The node status is manually changed by the user executing the work.

You can use the Details field to annotate this node with additional information on the purpose of this step or any other requirements.

You can attach triggers and notifications to a Manual node so that when a specific action is performed, such as assigning a task or status change, another action can be performed, such as sending a notification to a user.

Progress

The Progress node is used to follow the progress of various items like environments, scenes, jobs or assets. For example, It can be used in a Scene workflow to track the completion of an asset, such as a background.

You can set the Progress node to track (also known as listen) to a type of event (environment, scene, job or asset), a given workflow of that event, and a specific step in that workflow.
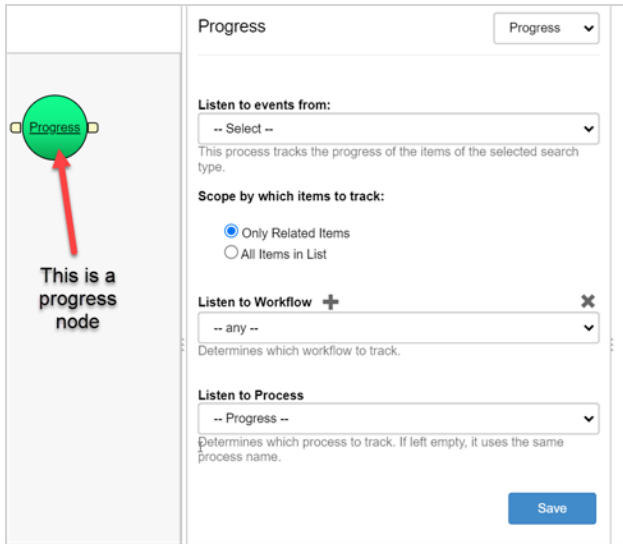
Action

The Action node is used to execute a script, either Python or Server Javascript. Once the previous process in the workflow is completed and its status set to either Complete or Approved, the script attached to the Action node will execute.

You can either create the script directly in the node properties or place your scripts in a common location on your server and add the path to the node.
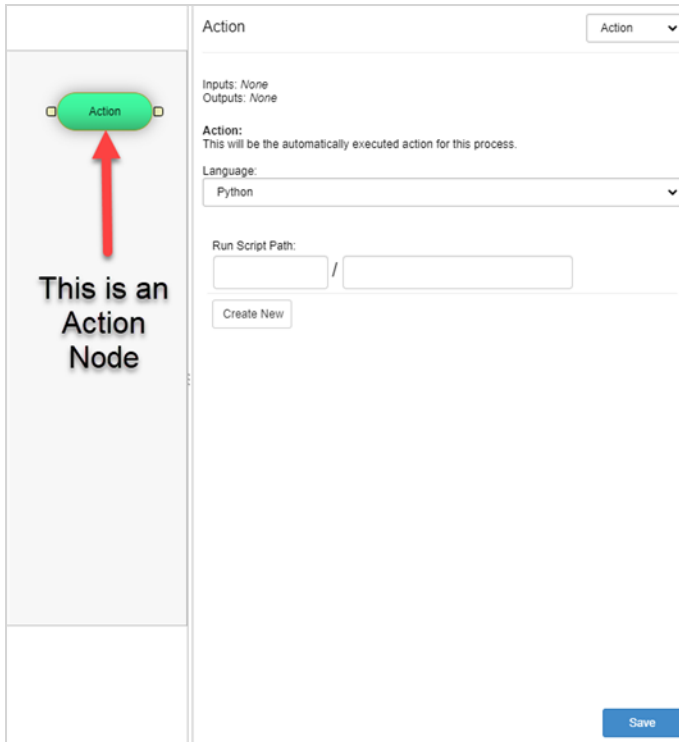
Condition

The Condition node is similar to the Action process. It will execute a script, Python or Server Javascript, that will return either True or False. This value can then be used by an Action process to run another script.

You can either create the script directly in the node properties or place your scripts in a common location on your server and add the path to the node.
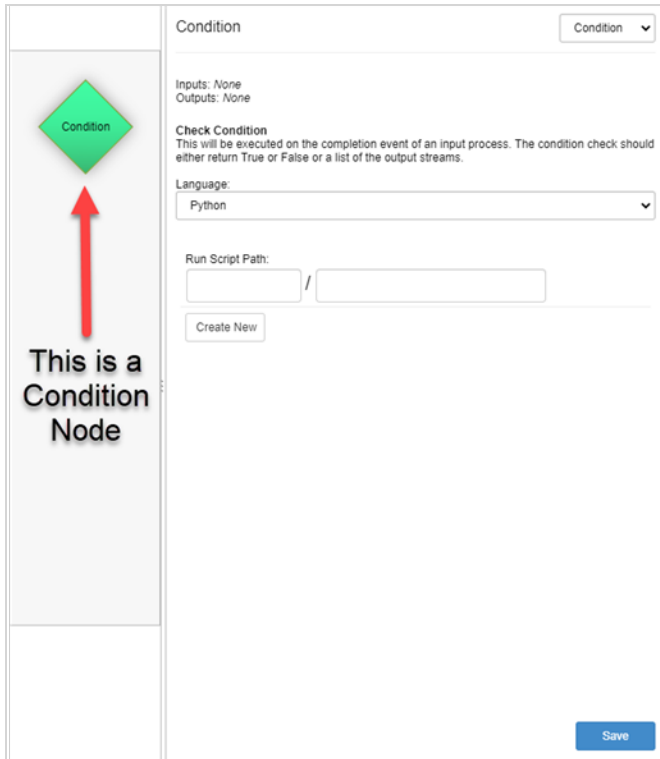
Approval

The Approval node is used when work created during a manual process needs to be reviewed by a supervisor. The supervisor will then update the status to Approved or Retake.

> **NOTE**
>
> If you want to attach a trigger to the Approval process, first set the process to Manual, create the trigger, and then set the type to Approval. The node will preserve the triggers.

Adding Nodes to Workflows

Workflows are made up of nodes, representing processes, which will eventually turn into tasks.

> **NOTE**
>
> When renaming nodes, DO NOT USE SPACES. USE UNDERSCORES. Spaces in process names will cause issues when pushing assets to Toon Boom Harmony.

> **NOTE**
>
> Since nodes can be connected in a non-linear manner, the order of the tasks in the dashboard will be based on the X-axis value of the node. Leftmost nodes will be shown first, and rightmost nodes will be shown last. Even if nodes are connected in different flows, it is the X-axis value that will determine the ordering.

How to add nodes to workflows

1. In the main menu, select **Settings**.
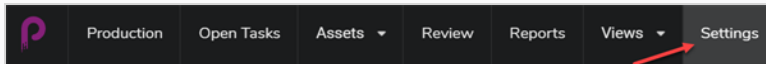
   The Project Settings are displayed.

2. Select the **Workflows** option.
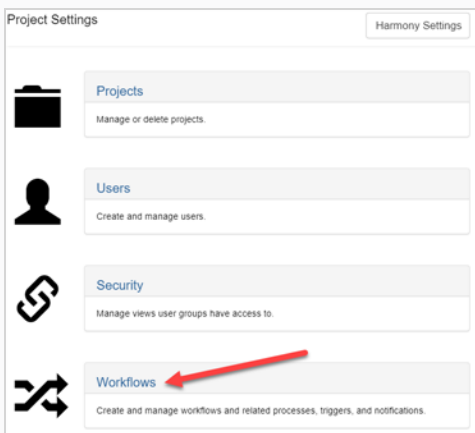
   The Workflow tab opens.

3. In the Workflow list, select the desired workflow.

   The workflow appears in the editor.

4. There are 3 ways that you can add a node to your workflow:

- Click on the Add ✚ ▼ icon add a new Manual node to the workflow.
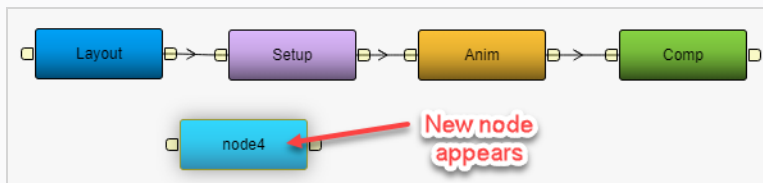
- Click and hold the down arrow next to the Add ✚ ▼ icon to select the node type you would like to add.

  The node type can be changed at any time from the node's properties panel—see About Nodes.
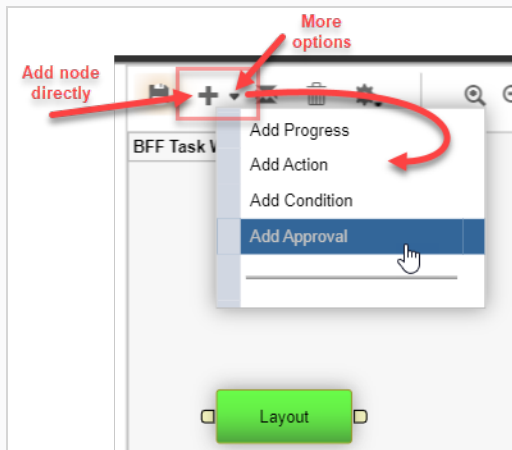
- Click and drag the outport of an existing node.
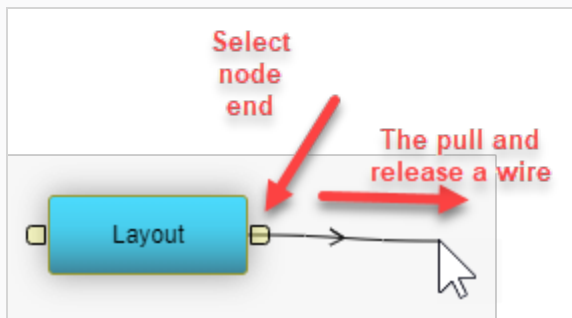
  When you release the wire a newly connected Manual node appears.
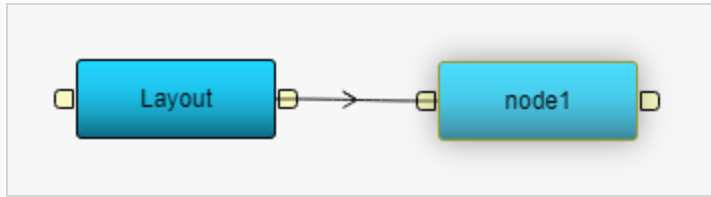
5. Right-click on the node and select **Rename Node**.
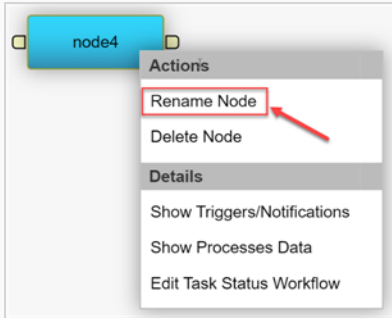
An editable field appears directly on the node.

6. Type the new name. DO NOT USE SPACES. USE UNDERSCORES.

7. Press Enter to validate the name.

8. Click on the Save 💾 icon to save changes. The Save icon has an orange glow 💾 whenever a change has been made to a workflow.

Connecting Nodes

You can easily connect nodes in Producer by following this procedure.

If there are no nodes in your current workflow, you should start by Adding Nodes to Workflows.

How to connect nodes

1. Click and drag the processes around to put them up in the right order. Workflows travel from left to right.

2. Click and drag from the output of the first node to the input of the second node.
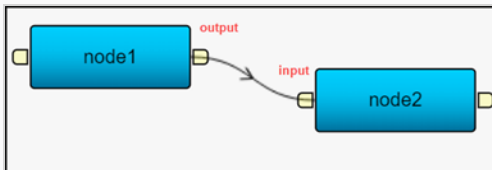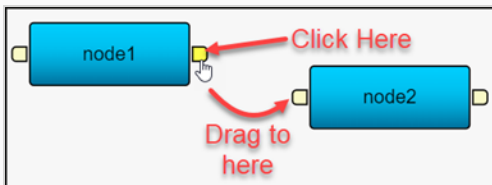
3. Click on the Save ⊞ icon to save changes. The Save icon has an orange glow ⊞ whenever a change has been made to a workflow.

Deleting Nodes

You can easily delete nodes from a workflow by following this procedure.

How to delete nodes

1. In the main menu, select **Settings**.
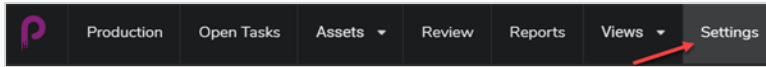
The Project Settings are displayed.

2. Select the **Workflows** option.
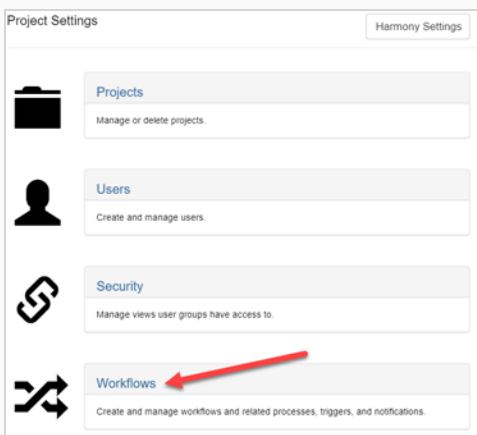
The Workflow tab opens.

3. In the Workflow list, select the desired workflow you would like to remove the node from.
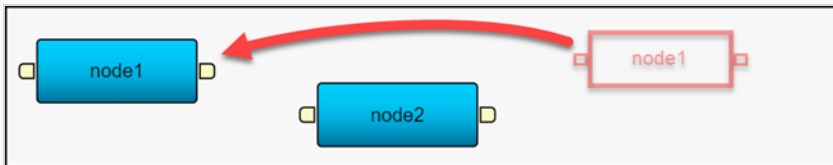
The workflow appears in the editor.

4. Click on the cable wire preceding the node you would like to remove.
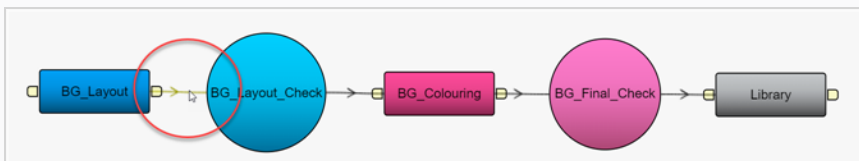
5. Then click on the **Trash** button in the Workflow Editor menu bar.
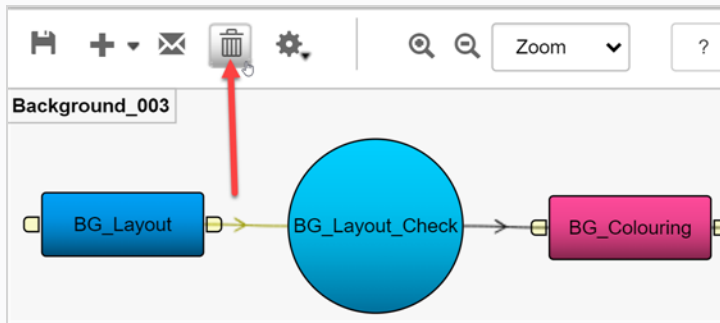
6. Click on the node you would like to remove, then click on the **Trash** button again.

    OR

    Right-click on the node you would like to remove and select **Delete Node**.
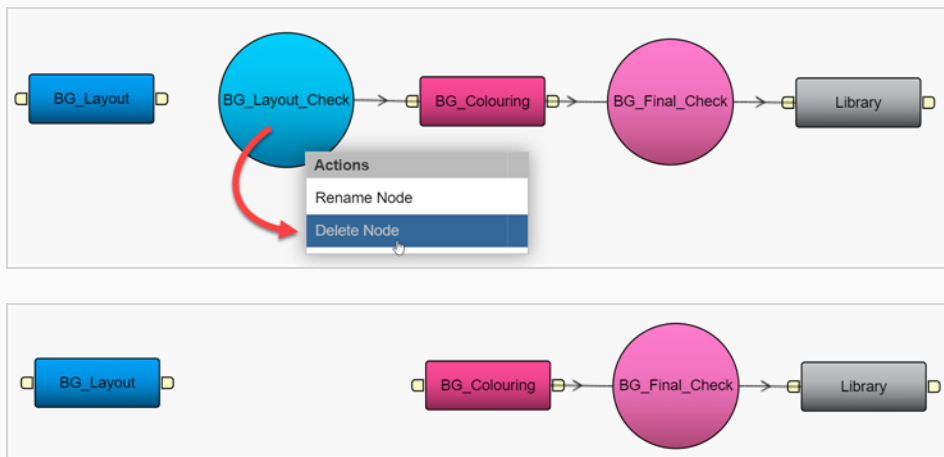
The node is deleted from the workflow.

Creating Triggers

Creating triggers allows the status of tasks in a workflow to be updated automatically. This eliminates the need for manual updating.

Before creating a trigger, you must first create a custom workflow—see [Creating Workflows](#) or [Duplicating Workflows](#).

> **NOTE**
>
> The following triggers do NOT need to be set, as they already built in:
>
> - If the status of a task is set to Approved, the status of the next task in the workflow will automatically be updated to Pending.
> - If the status of a task set to Approved is changed to Retake, the status of the preceding task in the workflow is automatically updated to Revise.

> **NOTE**
>
> Task status updates follow a logical progression, therefore be sure that tasks further down the pipeline are not set to a higher status than Pending (eg. Approved). If this occurs, the status of the high status task will remain unchanged and not be triggered to update correctly.

How to create a trigger

1. In your new Workflow, select the node for which you would like to incorporate a Trigger.

   The options for the selected node appear in the right panel.
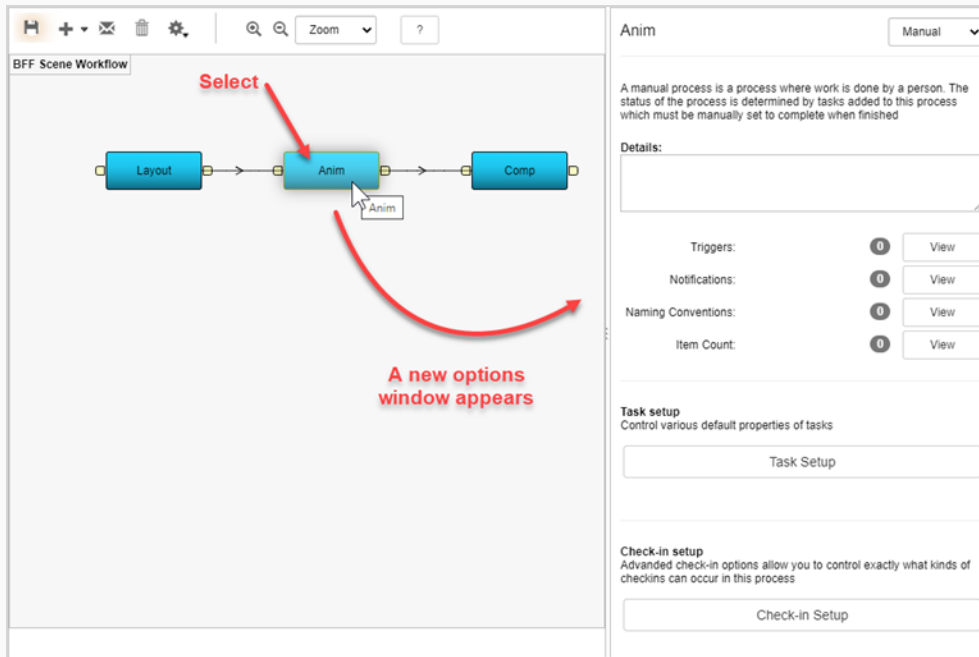
2. Click Triggers **View** button.
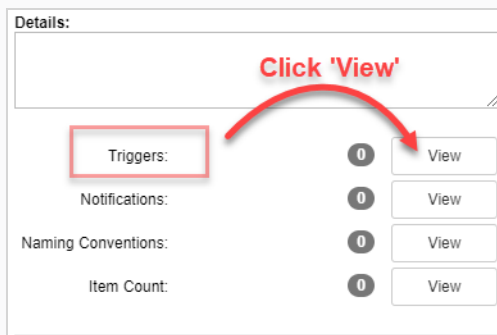
The Triggers dialog box appears.

3. Click on the plus button to add a new trigger.
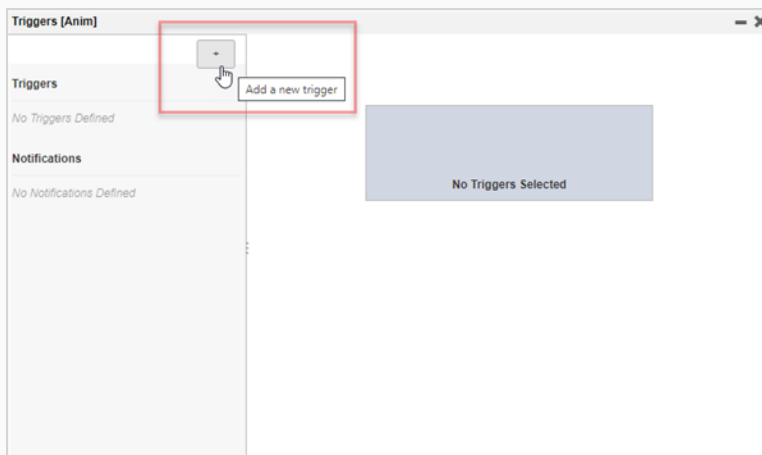
The Add a new trigger for process panel appears.

4. In the Name field, enter a name for the trigger.

5. In the Description field, type in a description of the trigger's action.

6. In the Scope section, select either:

Local to Pipeline. This option will only activate in the current workflow. This is the default often.

OR

All "NODE NAME" Processes. Any node of this name in any workflow will be affected by this trigger. In this example it's the "Anim" node.
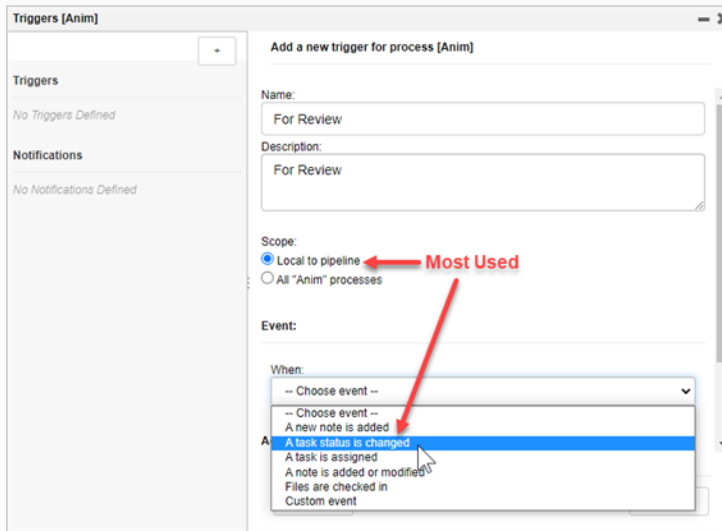
7. In the Event section, from the When drop-down list, select when the event should be triggered.

8. In the Event section, from the To drop-down list, select the status that will activate the trigger.

In the example here, when a task status is changed from any other status (Standby, Pending, Need Assistance, In Progress, etc.) to To Validate, the trigger is activated.

9. In the Action section, from the Do the following drop-down menu, select the action that the trigger will activate.

Depending on which action is selected, a corresponding set of additional options will appear.

10. After completing the additional options, click on the Save button.
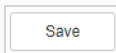
In the Production tab, changing the status of the given task/node now triggers the set action.

In this case, changing the status of the Anim task from Pending to To Validate automatically updates the status of Comp (the next task in the workflow) from Standby to Pending.

11. Click on the Save ⊟ icon to globally save the changes.
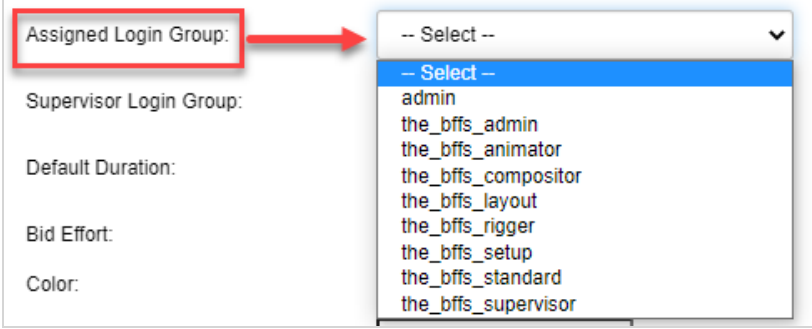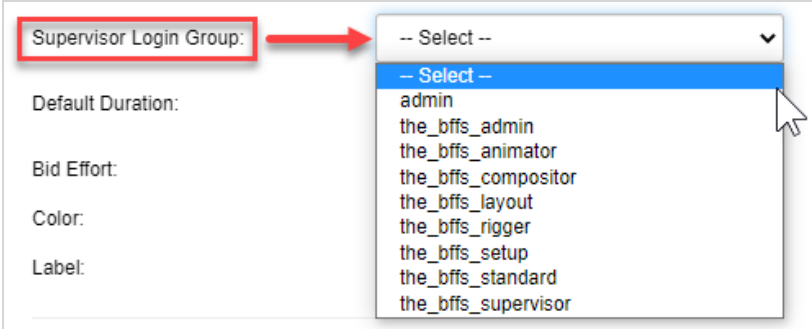
Task Setup Options

In any Workflow, you can further modify the task options of a node by going into its Task Setup.

By selecting the node you wish to modify, its properties appear in the options panel. Click on the Task Setup button to bring up the Task Setup options.

Option	Description
Completion	Set a number from 0 to 100 as the percentage that this task represents in the complete workflow. When added together, the Completion value for all the nodes in a workflow should = 100.
Task Status Workflow	Select a task status workflow from the drop-down menu to link it to your task. The status options become available as a drop-down menu in the task.
Assigned Login Group	Set an Assigned Login Group so that for any of these processes a specific group of users will appear under the tasks. This is especially useful if there are many users.

Option	Description
Supervisor Login Group	In this drop-dwon menu, you can select a supervisor login group from the list.
Default Duration	Use this field to enter the how many days a task should take. This value is tied into the GANTT chart.
Bid Effort	Use this field to enter the how many hours a task should take. This is tied into the GANTT:
Color	Click on the hex code in this field to bring up the colour picker window. Use the colour picker window to select a colour. Click on the **Select** button to confirm the colour selection. The new hex code and colour appears in the Color field. If you know the hex code of a desired colour, you can copy and paste it into the field or type it in manually. Click the **Save** button to confirm the change. The task (which you can view in Production and Asset > Manage tabs) associated with the node takes on the same colour.

Option	Description
Label	Set a Label. Can be useful if you would like the name in a different language.

Creating Overview Job Workflows

It is possible to create a Overview Job workflow in which you can quickly view the percentage of status' that are complete for a particular task.

Asset Check
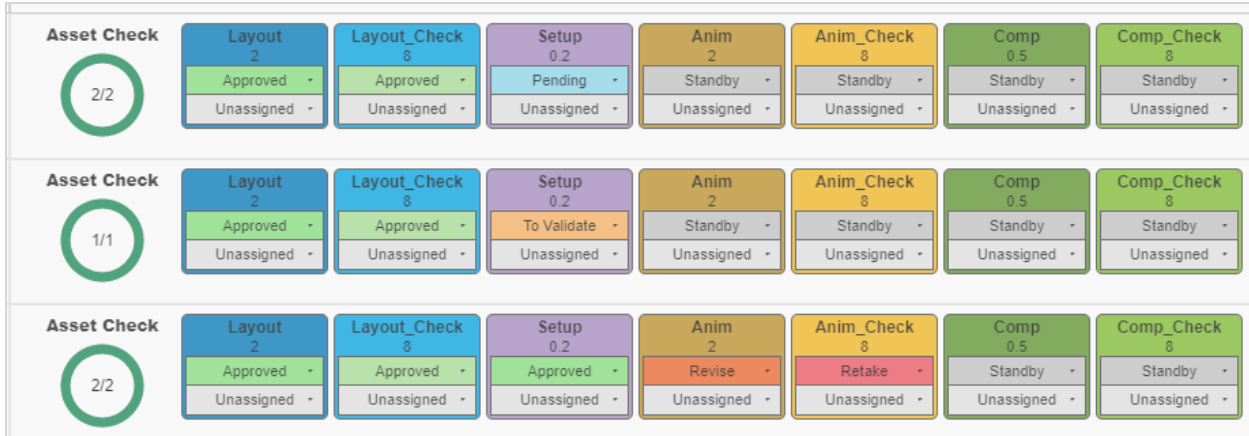
Task Completion Overview
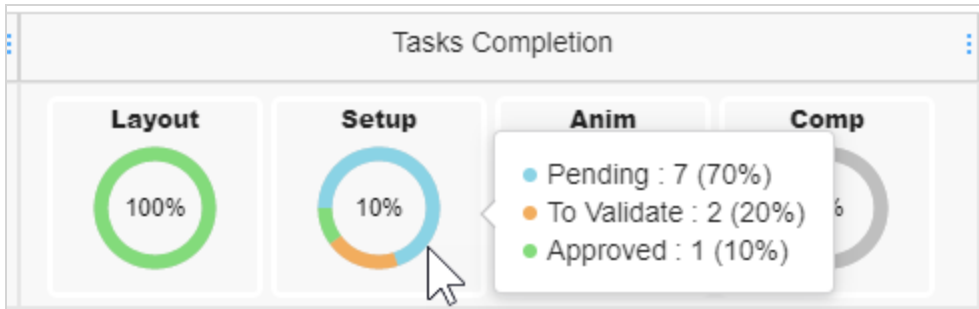
How to create an Overview Job workflow

1. In the main menu, select **Settings**.
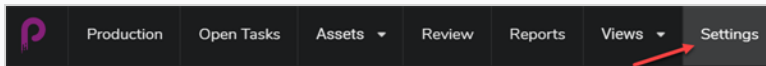
The Project Settings appear.

2. Select the **Workflows** Option.
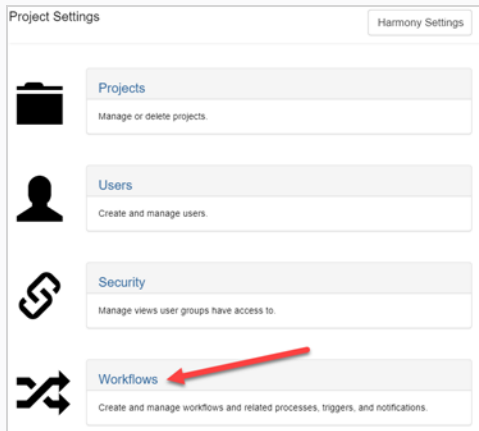
The Workflow tab opens.

3. In the Workflow list, select the desired workflow you would like to add the Overview to and right-click on it.

4. From the pop-up menu, select **Duplicate**.
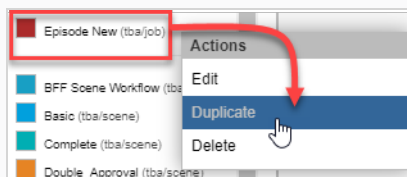
The duplicated workflow appears in the Project Workflows list.

5. Right-click on the new workflow and select **Edit**.

The Edit Workflow Details window appears.

6. In the Name field, rename the Workflow and change the Search Type to **Job** (if it is not already).

7. Click **Save**.

8. Select a node, then in the side panel, from the Node Type drop-down menu, select **Overview**.
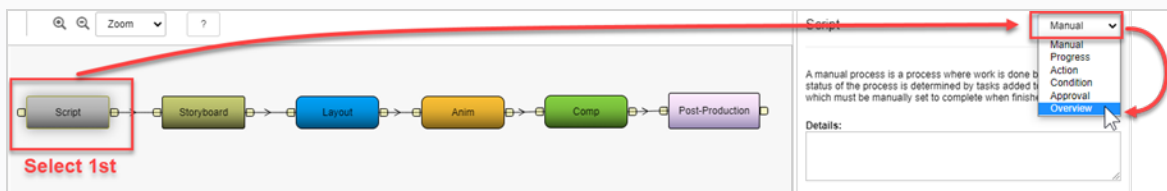
Repeat this step for each node in your Workflow.

How to incorporate an Overview Job workflow into your production

1. In the main menu, select **Production**.
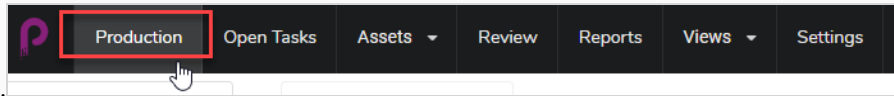
2. In the Production page, from the environments drop-down (All Environments), select the environment you are looking for.
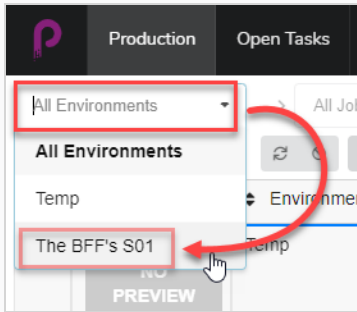
3. In the jobs drop-down, be sure to have **All Jobs** selected.

4. In the list of environments, select the jobs you would like to add the Job Overview workflow to.

5. In the Production tab toolbar, click on the **More** button and select **Edit Tasks**.
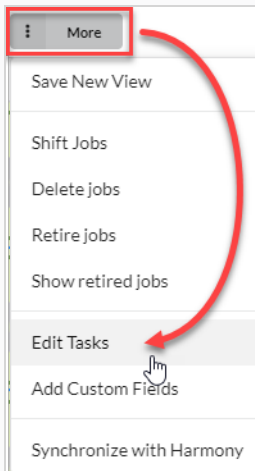
The Edit Tasks window appears.

6. In the Task Operation drop-down menu, select **Replace**.
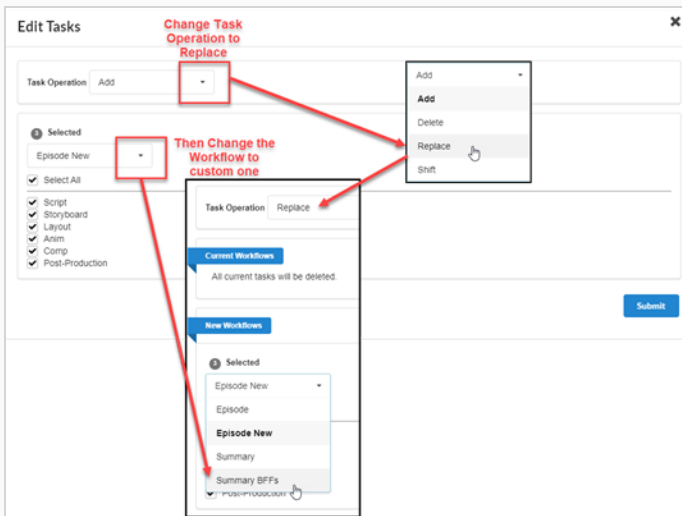
7. In the Selected drop-down menu, select the job overiew workflow that you createdd.

8. Click **Submit**.

The selected jobs are updated to Job Overview workflows

Chapter 4: Production

The Producer structure is divided as follows:

- Project
    - Environments
        - Jobs
            - Scenes

Environments are a collection of jobs. Typically, environments are used to separate the seasons of an animated series, or to separate animation series themselves.

Jobs are a collection of scenes. Typically, jobs are used to separate the episodes of an animated series.

Creating Projects

Creating a project is the first step to creating and housing environments, jobs and scenes.

How to create a project

1. In the main menu, select **Settings**.
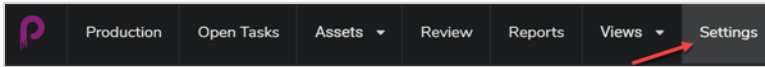
   The Project Settings are displayed.
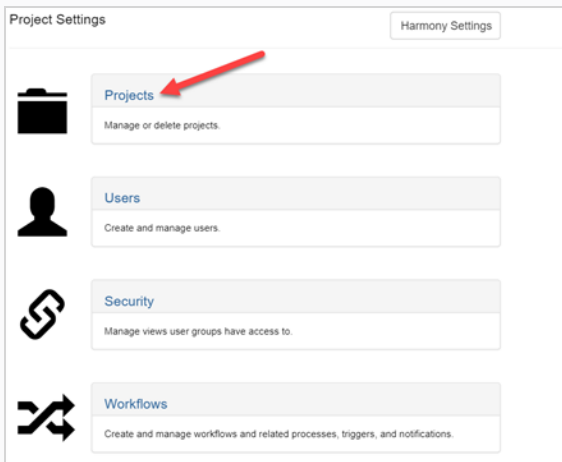
2. In the Project Settings tab, select **Project**.

   The Projects tab opens.

3. In the Projects tab, click on the **New Project** button.

   The Create a new project window appears.
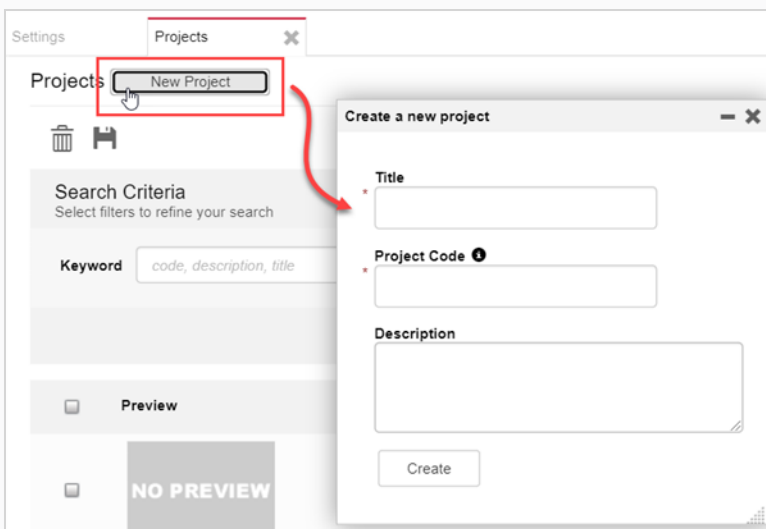
4. In the Title field, enter the title of the project.

5. In the Project Code field, enter the project code.

> ⚠️ **IMPORTANT**
>
> The project code is a very important key that will tie many components of the project together. The project code must contain only alphanumeric characters [A-Z]/[0-9] and only an '_' as a separator.

6. Click on the **Create** button.

   A status bar appears. When it reaches 100% the Go to New Project and Close buttons appear.

7. Click on the **Go to New Project** button.

   The project appears.
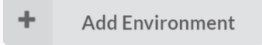
Creating Environments

Environments are a collection of jobs, each of which is a collection of scenes. Typically, environments are used to separate the seasons of an animated series, or to separate animation series themselves. Special environments can also be created to store scenes containing character models and assets for a series.

A new project does not have any environments. To start creating the structure of a project, environments must be manually created by a user with administrative privileges. A project can have as many environments as needed.

Users with the appropriate privileges can add, edit, retire, and delete environments.

How to create an environment

1. In new project, click on the Add Environment ⊞ Add Environment button.

   The Create Environment window appears.
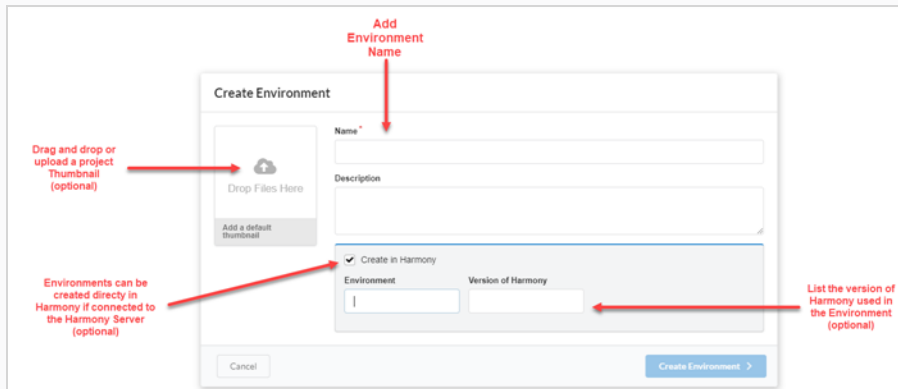
2. In the Name field, enter a name for the Environment.

3. In the Description field, you can choose to add an optional description for the environment.

4. If you choose, you can check the Create in Harmony checkbox to create the environment directly in Harmony in you are connected to the Harmony server.

   If you do choose this option, you now have the option to create a different environment name than the one that will appear in Producer, as well as the version of Harmony used in the environment.

5. If you choose, you can drag and drop an image or movie clip file onto the Add a default thumbnail box, to create a preview image for the environment—see Adding a Preview Image for an Asset.

6. Click on the **Create Environment** button.

   The environment appears in your project.

Creating Jobs

Jobs are a collection of scenes. Typically, jobs are used to separate the episodes or other segments of an animated series. Special jobs can also be created to store scenes containing character models and assets for a series.

A new job does not have any scenes by default. To start creating the structure of a job, scenes must be manually created by a user with administrative privileges. A job can have as many scenes as needed.

Users with the appropriate privileges can add, edit, retire, and delete jobs, and all users may search, open, and view jobs.

How to create a job

1. In the main menu, select **Production**.
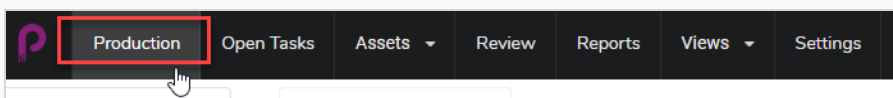
   The Production tab opens.

2. In the All Environments drop-down menu, select the environment you are looking for.
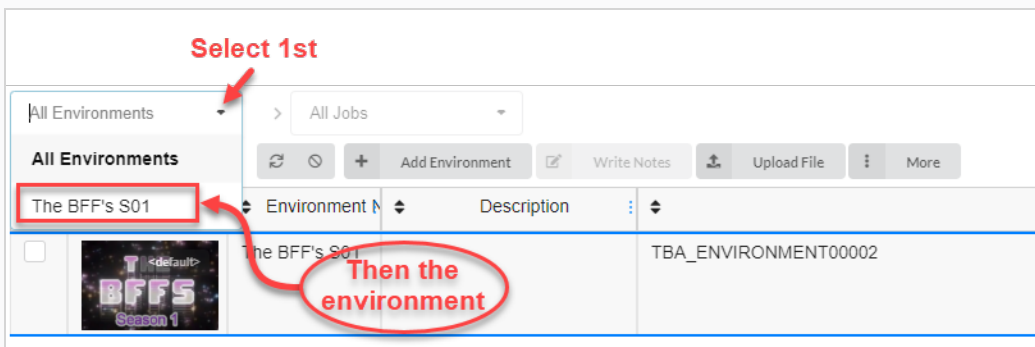
3. Once in the environment, click on the Add Jobs button.

   The Create Job window appears.

4. In the Number of jobs field, enter the desired number of jobs you would like to populate the environment. You can always add more jobs later.

5. Click in the Start Date field to bring up the calendar and choose the start date for the first job.

6. If you entered a value greater than one in the Number of jobs field, in the Days between jobs field, you have the option to set the number of days between jobs.

7. In the Name field, enter the name of the job. This is the only mandatory field. If you use a number at the end of the job name, Producer will automatically create a sequence for the subsequent jobs using the same numbering convention (ie: 101; 102; 103; etc.).

8. In the Job Workflow drop-down menu, select an existing workflow. This could be either one of the workflows that comes with Producer or a workflow from another environment in your account. You can always change it later in Settings.
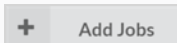
9. In the Scene Workflow drop-down menu, select an existing workflow. This could be either one of the workflows that comes with Producer or a workflow from another environment in your account. You can always change it later in Settings.

10. Check the Create in Harmony option box if you want to create Harmony files directly to the Harmony Server (if connected). Do NOT check this option if your scenes will be created in Harmony Standalone.

    If you checked this option, you now have the option to add the Job name and Version of Harmony.

11. Click on the **Create Job** button.

Your job page will look something like this:

Creating Scenes

Once you've created an environment and jobs for your project, you can start to populate your job with scenes.

How to create a scene

1. In the Production page, from the list of jobs, double-click on the job you would like to create scenes for. Alternatively, go to the Jobs drop-down menu, click on the down arrow and select a job from the list.
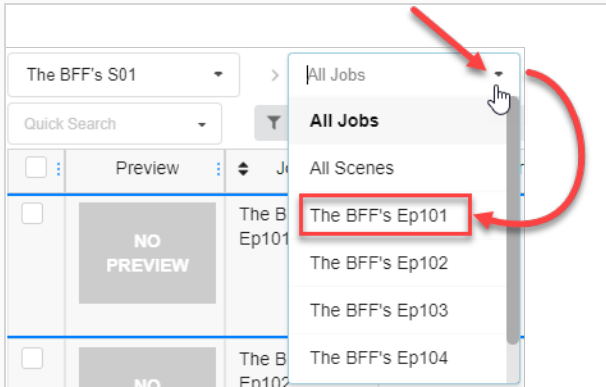
2. Once inside the job, click on the Add Scenes button.

   The Create Scene window appears.

3. In the Number of scenes field, enter the number of scenes you would like to create. You can always create more later.

4. In the Name field, enter the name of the scene. This is a mandatory field.

5. In the Workflow drop-down menu, select an existing workflow. This could be either one of the workflows that comes with Producer or a workflow from another environment in your account. You can always change it later in Settings.
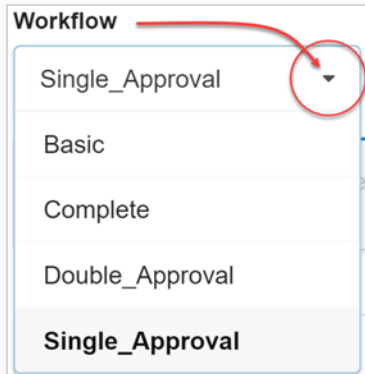
6. In the Number of frames field, set a number of frames to start out each scene.

7. In the Priority drop-down menu, select the priority level for the scenes. This can be No priority or anywhere between 1 - Critical and 5 - Low.

8. Check the Create in Harmony Server option if you are connected to the Harmony Server and if the corresponding environment and job were already created there.

   Additionally, you have the option to enter the scene name, as it will appear in Harmony, as well as the version of Harmony being used.

9. Check the Harmony Standalone scenes if you would like to create scenes for Harmony Standalone.

   Additionally, you have the option to enter a Workspace ID and a Relative Path (often the scene name).

10. Click the **Create Scene** button.

    The scene(s) are added to your job.

Editing Tasks

Once a task is created for a given scene or asset, it can easily be modified.

How to edit a task

1. In the main menu, select either **Production** or **Asset > Manage**.

2. In the Environment, Jobs or Scene drop-downs, select an environment, scene or job or a combination.

   The tab is populated.

3. From the list, select the assets to edit by checking their checkboxes.

4. In the tab toolbar, select **More** > **Edit Tasks**.
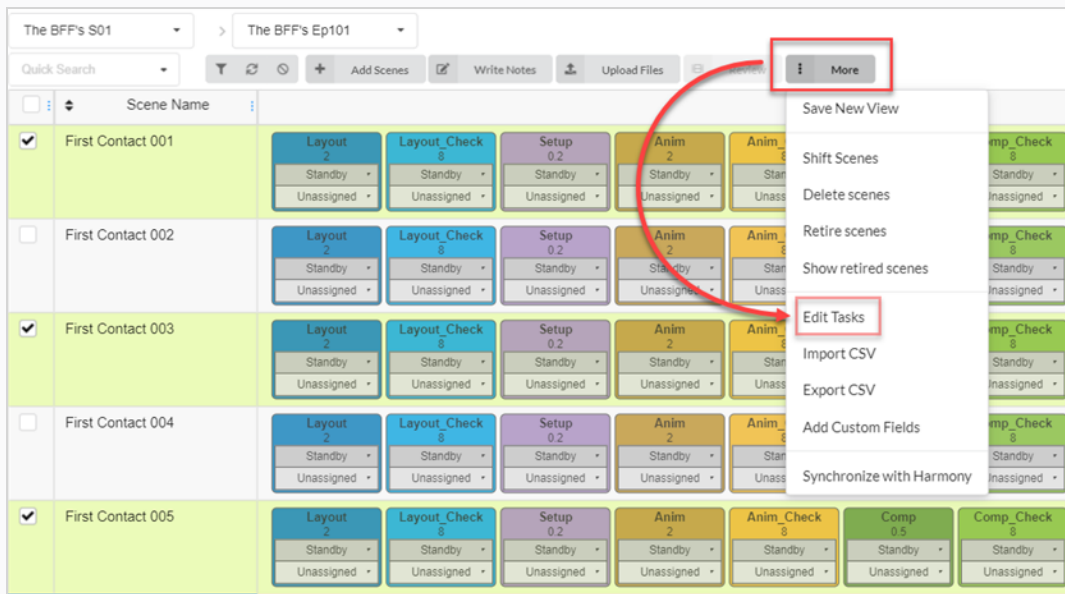
The Edit Tasks window appears.
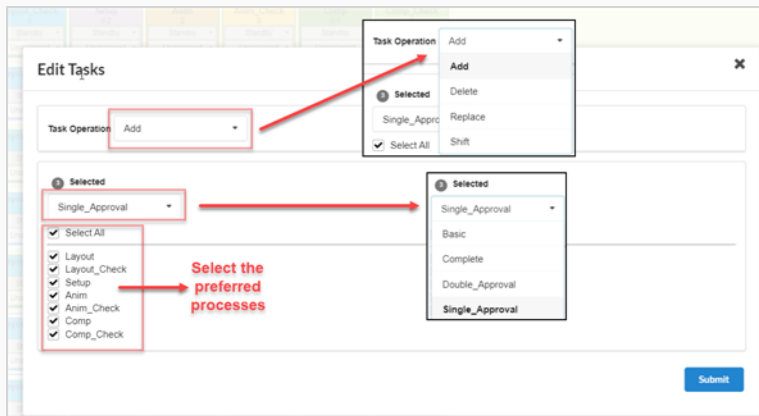
5. In the Task Operation drop-down menu, select one of the following:

    -   **Add** - To add missing tasks to selection

    -   **Delete** - To delete existing tasks from selection

    -   **Replace** - To replace some or all tasks for the selection

    -   **Shift**

6. In the Selected drop-down menu, change the Workflow type.

7. In Processes list, check the tasks you wish to include in the Workflow.

8. Click the **Submit** button.

Writing Notes

The Write Notes feature allows you to create notes on one or multiple scenes that have been selected.

How to create a note

1. In the top menu, select either **Production** or **Assets > Manage**.

2. From the drop-down menus, located under the main menu, bring up a list of environments, jobs or scenes.

3. From this list, select which you would like to add notes to by checking their corresponding check box.

4. In the tab toolbar, click on the **Write Notes** button.
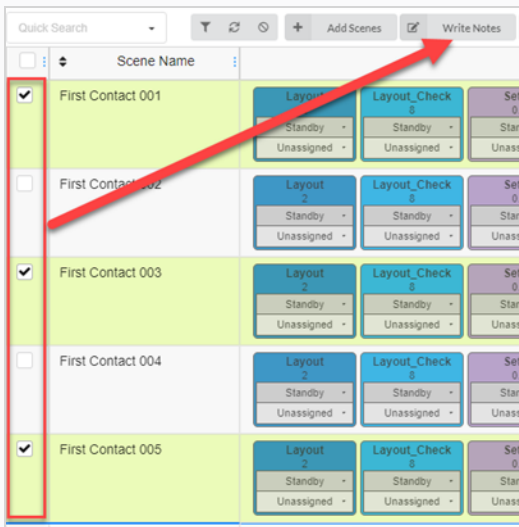
The Create New Note dialog box appears.
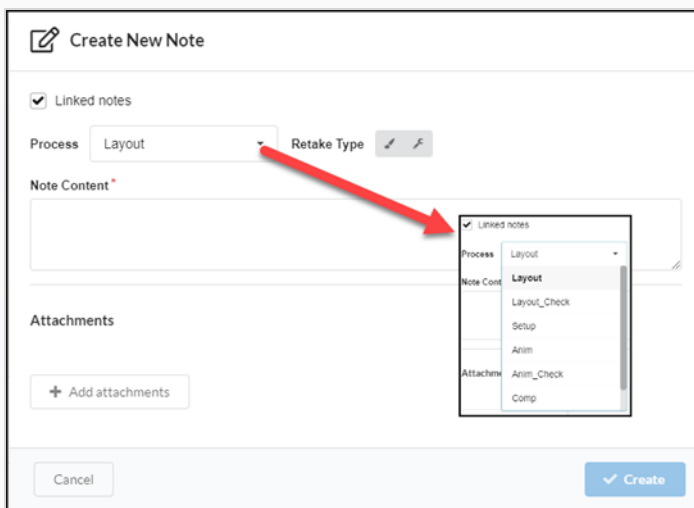
5. Check the Link notes option if you want changes in one note to automatically update in the other notes for all the assets you selected.

6. In the Process drop-down menu, select the task/process in the worklfow that you would like to add the note to.

7. Select the retake type (ie: artistic, technical, or both).

8. In the Note Content field, type in your note.

9. Click on the Add attachments button if you would like to add an attachment.

10. Click the **Create** button.

    The note is added to the selected assets.

About Gantt Charts

A Gantt chart is available from the Production page under All jobs of any environment. It can be displayed by switching layout type along List and Tiles views.
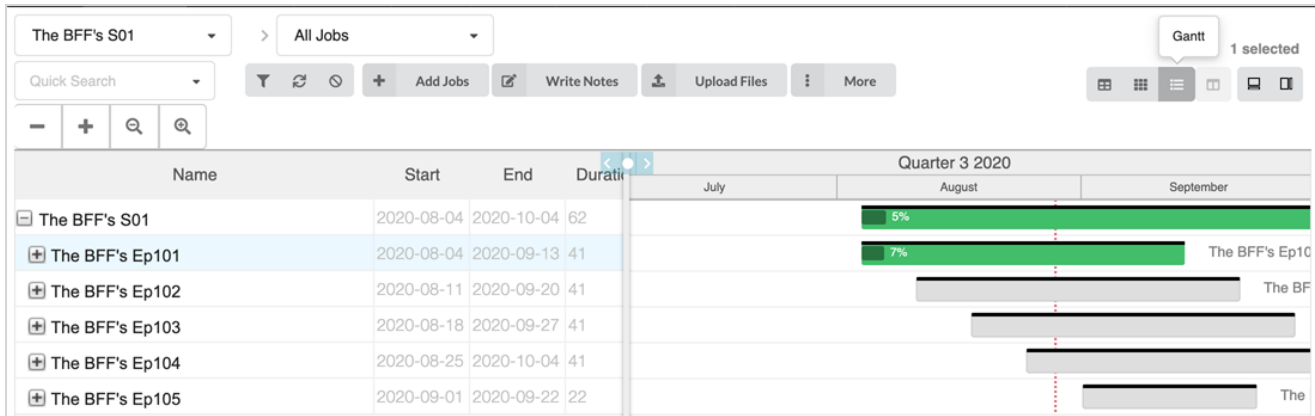
The Gantt chart lists all current jobs and their tasks for the selected environment. It can be collapsed to have an overview of when jobs should start and end over time or it can be fully expanded to display all tasks for every job. Every row displays the name, duration (in days), start and end dates for the environment, it's jobs and all tasks from their workflow.

On the right side, there is a timeline and progress bar for each row, it will turn from grey to green when tasks start getting approved or completed. There is also a completion % that indicates the progress for each task, every job and the environment itself.
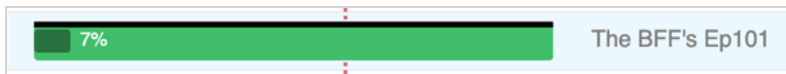
If a job needs to be shifted over in time, simply highlight the desired job and click on More in the menu above the table, then select Shift Jobs. In the Shift Jobs window, simply select the number of days it will be shifted over (jobs can be shifted in the future or in the past, using positive or negative values).

Chapter 5: About Assets

Assets are typically any component of a production use to produce scenes and track in Producer. This can include character sheets, model references, character rigs, backgrounds, music, and more.

Producer can be used as a file server under some circumstances.

Assets can be sorted one of two ways:

- **Categories**: Asset categories are a way of classifying assets based on the purpose of an asset within a production, such as characters, backgrounds, props, and more.

- **Types**: Types can be used to categorize the type of file, such as a PNG, JPEG, MOV, MP4, GIF, PSD, or PDF.

The following image types are supported for assets: PNG, JPEG, GIF, BMP, TGA, TIFF, PSD, AI, PDF, MP4, MOV.

About Asset Details

An asset has many properties and attributes. By default, the Asset page only displays some information about each asset in the asset list.
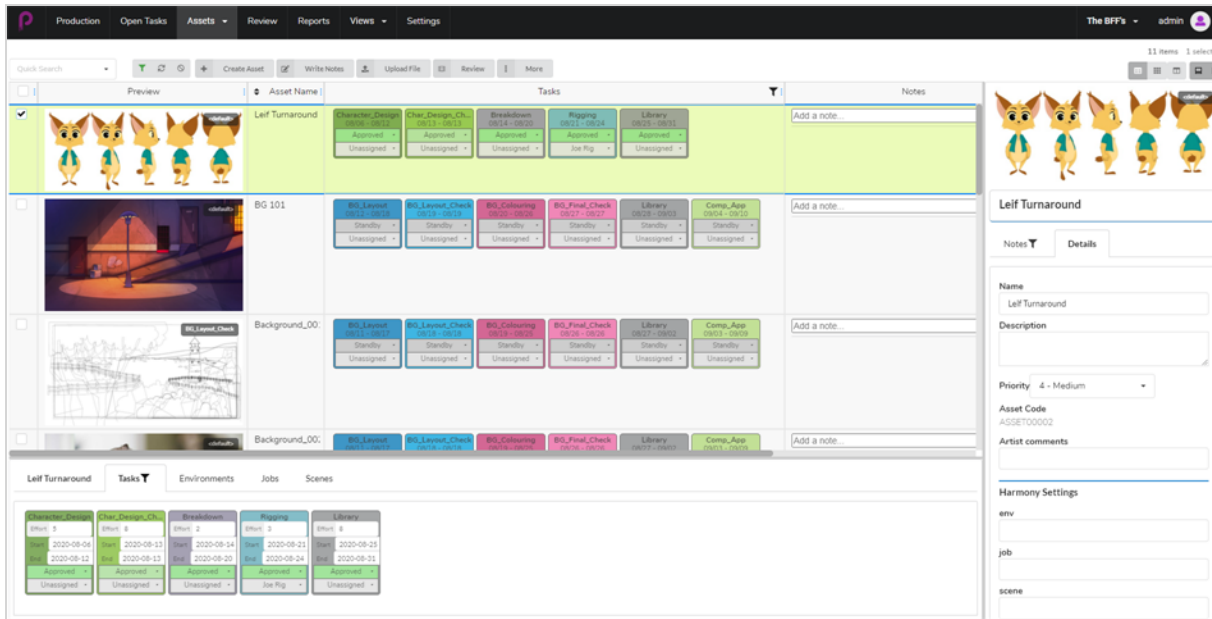
To display more information on an asset, depending on the type of information you want to see, you may have to:

- Add a column containing this information to the asset list.
- Select a specific asset, then open either the side panel or the bottom panel to view more information about it.

Columns in the asset list can display the following information:

- Selector
- Preview
- Tasks
- Asset Name
- Description
- Type
- Category
- Notes
- Priority
- Completion

- Workflow Code

- Asset Code

- Harmony Status

The side panel displays the following information:

- Preview thumbnail

- Name

- Description

- Priority

- Asset Code

- Notes

- Harmony Settings: environment/job/scene/harmony version

The bottom panel displays the following information:

- Tasks

- Environments

- Jobs

- Scenes

The following table lists each type of information about an asset, and which method will display it:

Information	Description	Asset List	Side Panel	Bottom Panel
Preview	The preview thumbnail for the asset.	Preview column	Side panel	N/A
Tasks	A step in a workflow.	Tasks column	N/A	Tasks tab
Asset Name	The display name of the asset.	Name column	Details tab	N/A
Description	The description of the asset.	Description column	Details tab	N/A
Asset Type	Categories can be used to identify the purpose of an asset.	Asset type column	N/A	N/A

Asset Category	Types can be used to categorize the file type.	Category column	N/A	N/A
Notes	All the notes that were added to the asset.	Notes column	Notes tab	N/A
Priority	A rank indicating the importance of a given asset.	Priority column	N/A	N/A
Open Harmony	If Producer has been configured to synchronize with Harmony, you can click this button to open the asset directly in Harmony.	Open Harmony column	N/A	N/A
Completion	A progress wheel tracking the percentage of the asset that has been completed.	Completion column	N/A	N/A
Workflow Code	The type of workflow being used for the asset.	Workflow Code column	N/A	N/A
Asset Code		Asset Code column	N/A	N/A
Scene Asset Code	If a scene has been converted to an asset, this is the code of the asset it is linked to.	Scene Asset Code column	Side panel	N/A

Uploading an Asset

Upload scripts, characters, backgrounds and 3D models to help visually assist your task workflow.

Users with administrative privileges can create one or more assets at a time.

How to upload an asset

1. In the top menu, click **Assets > Manage**.
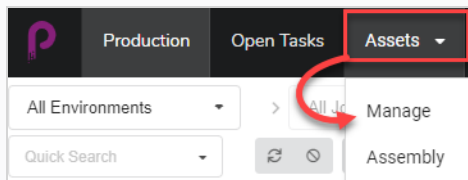
   The assets list opens.

2. In the toolbar above the asset list, select **Create Asset.**

   The Create Asset dialog box appears.

3. Upload a thumbnail for your asset by clicking and dragging your file into the Drop Files Here box.

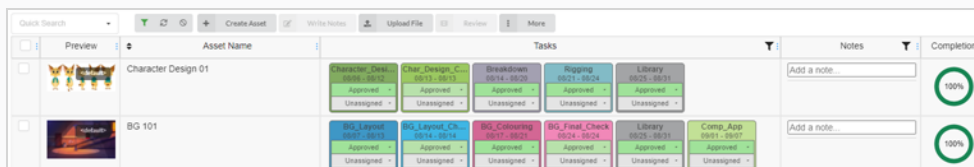4. In the Name field, type in a name for your new asset. It must be unique or else an error will occur.

5. OPTIONAL: Link a Harmony Scene asset by checking the box.

   New fields appear. Fill in the Environment name, Job name, Scene name and Version of Harmony fields to link the asset from an existing Harmony scene.


> **NOTE**
>
> This does not create a scene on the Harmony Server, it only links to an existing scene.

   OR

   Check the Harmony Standalone box to link to an asset from a standalone version of Harmony.

   New fields appear where you can enter in the Workspace ID and Relative Path.

6. In the Description field, type in a description for the asset.

7. In the Type drop-down menu, select what type (3D Model, Image, etc.) of asset you intend to upload.

8. In the Category drop-down menu, select a category (Bg, Main Character, etc.) for the asset type .

9. In the Workflow drop-down menu, select your workflow (background, character or prop).

10. In the Tags field, type any words you would like to associate with the asset that can later be used in searches. Hit **Enter** after typing each tag to validate it.

11. In the Assembly section, from the Environment drop-down menu, select an environment.

   The Jobs drop-down menu is enabled.

12. In the Assembly section, from the Jobs drop-down menu, select a job.

13. To save your new assets, click the Add Asset button.
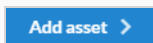
   Your assets are now available in the asset list.

Searching for Assets

If you have a lot of assets and you need to find a specific asset, you can filter the assets in the list using keywords from their descriptions. You can also choose to only view assets based on the specific process, status or user they are assigned to.

How to search for assets using keywords

1. In the top menu, select **Assets > Manage**.
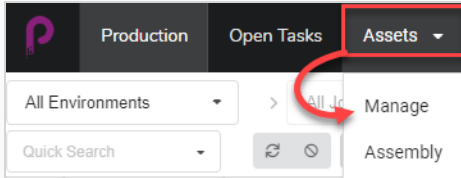
   The asset list opens.

   > 💡 **TIP**
   >
   > To include retired items in your search results, in the toolbar above the asset list, click ⋮ More and, in the pop-up menu, select **Show Retired** Items.

2. In the toolbar above the asset list, click in the Quick Search field and type in all or part of the name of the asset you would like to find. Hit the **Enter** key to initiate the search.

   > 💡 **TIP**
   >
   > When an asset is created, the creator had the option to associate certain words with the asset (tags)—see Uploading an Asset. These tags are usually descriptive of the asset and can now come in handy when doing a search.
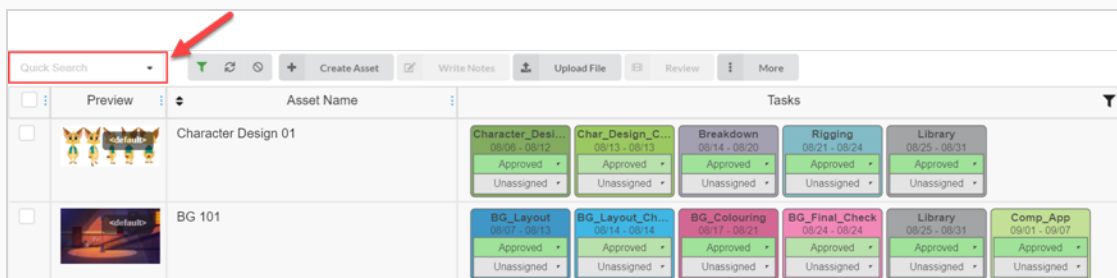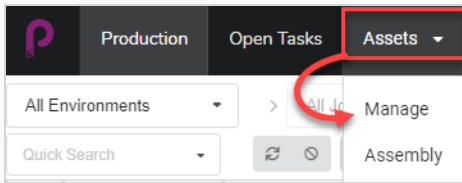

   Assets containing your search term appear.

3. You can repeat this step to add several search terms. Only assets containing all of your search terms in their name will appear in the list.

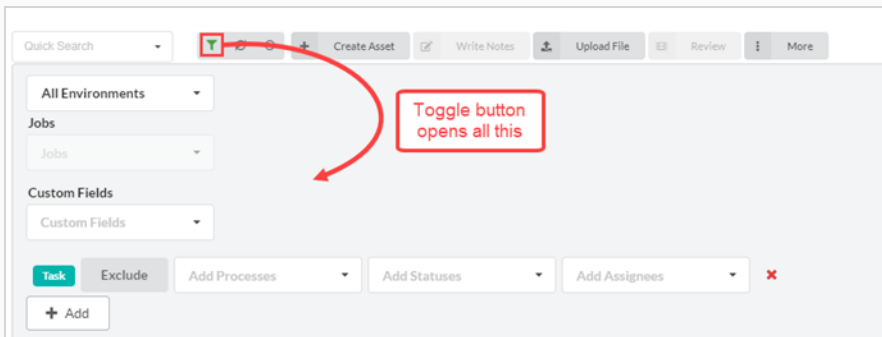**How to filter assets by their tasks, statuses and assignees**

1. In the top menu, click **Assets > Manage**.

The assets list opens.

2. In the toolbar above the asset list, click on Toggle Search Panel.

The search panel appears.

3. From the All Environments drop-down list, select an environment as an asset search filter.

The Jobs drop-down menu is enabled.

4. Use the Jobs drop-down menu and Custom Fields fields to continue refining your search. If you need more filters or a different set, click on the Add button to bring up the Add Processes, Add Statuses and Add Assignees drop-down menus. You can use this second set of filters to exclude, rather than include, additional information by clicking on the Exclude button.

Use some or all of these filters at your discretion.

You can add several items from any of these categories by clicking on the Add button to create another row of the same filters. An example of where this might be useful is when you need to search for 2 different processes assigned to the same person.

5. Click **Apply Search Criteria** at the bottom of the search panel.
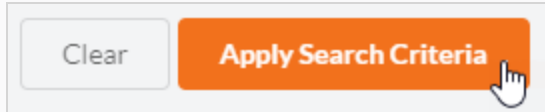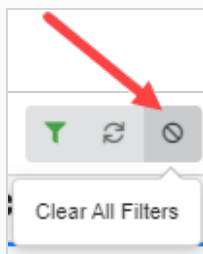

The assets that match your search appear in the asset list.

How to clear search terms and filters

Do one of the following:

- Click the ✖ on all search terms in the Quick Search text box.

- Hit the Backspace key to remove the last search term until all the search terms have been erased.

- In the toolbar at the top of the assets list, use the Clear All Filters button

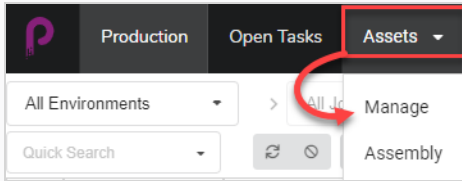- At the bottom of the Search Panel, click on the **Clear** button.
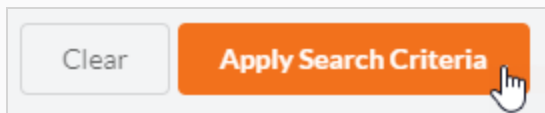
All of the assets within the job are displayed in the asset list again.

Editing an Asset

Once an asset has been created, you can edit its description, workflow, and other information at any time.
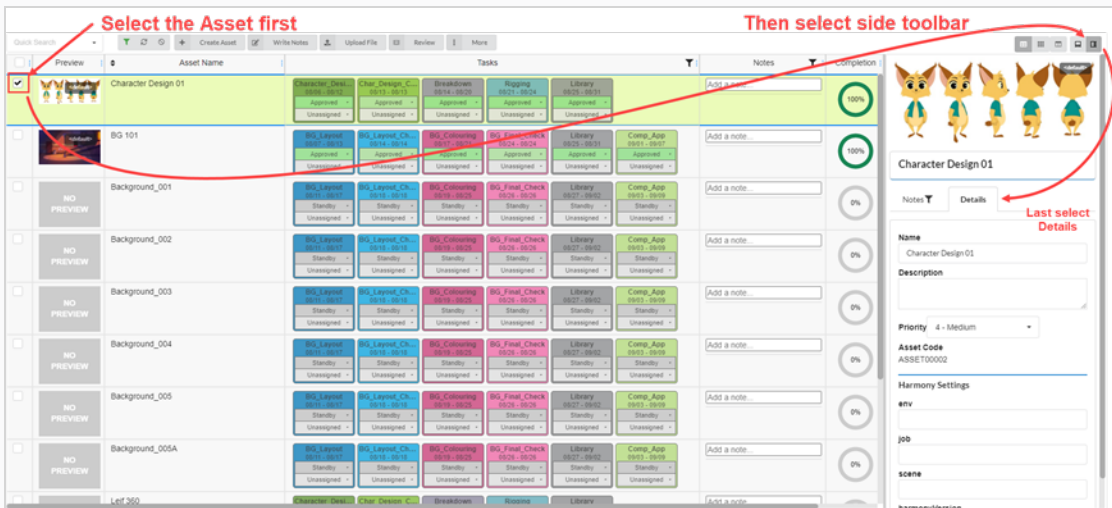
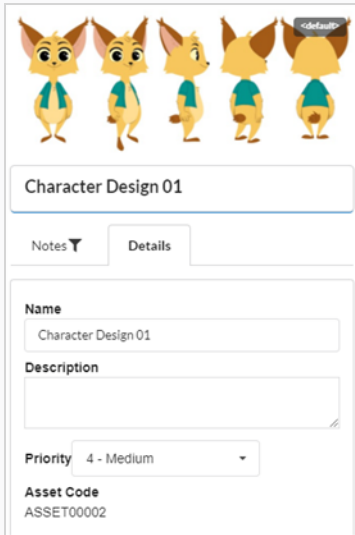### How to edit the name and description of an asset

1. In the top menu, click **Assets > Manage**.

   The assets list opens.

2. In the asset list, click on the check box of the asset you wish to edit.

3. If the side panel is not visible, in the toolbar at the top-right corner of the asset list, click the ⊡ Toggle Side Panel button to display it.

4. In the side panel, select the Details tab.

5. To rename the selected asset, in the Name field, type in a new name.

6. To update the description of the asset, in the Description field, type in a new description.

7. To change the priority of the selected asset, from the Priority drop-down menu, select a new priority.

8. To save your changes, click anywhere outside the side panel.

   A toaster notification (pop-up) appears in the bottom-right corner of the page, indicating that the asset is being updated. When the toaster notification disappears, the asset changes are saved.

Deleting an Asset

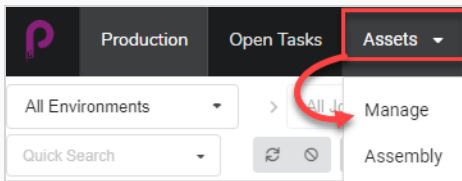Assets can be permanently deleted.

> **NOTE**
>
> Deleting an asset will delete all of its tasks, previews(uploads) and assembly data. Deleted items will be permanently lost, and cannot be restored.

How to delete assets

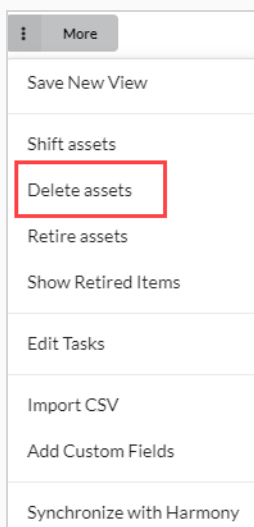1. In the top menu, select **Assets > Manage**.
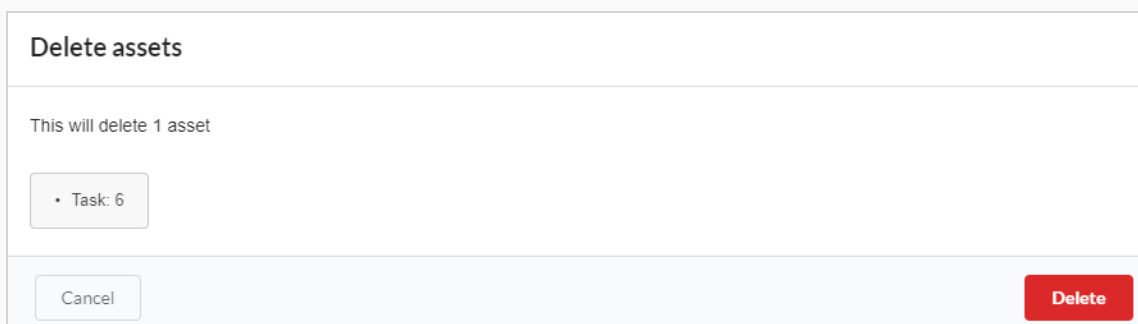

   The Asset list opens.

2. In the Asset list, enable the checkbox on the far left column of the item you wish to delete.

3. In the toolbar above the asset list, select **More > Delete Assets**.

The Delete Assets dialog box opens.

4. In the confirmation prompt, click **Delete**.

    The asset has now been deleted.

Adding a Preview Image for an Asset

You can add or change a preview image of any asset that appears in the Preview column in the asset list. This can be done from either the Assest > Manage tab or the Production tab.

The following image types are supported for preview images: PNG, JPEG, GIF, BMP, TGA, TIFF, PSD, AI and PDF.

If you upload a movie clip (MP4 or MOV) as a preview, the first frame of the movie will automatically be set as the image. You will be able to play the clip from the Preview column.

For an animated GIF or video file, the first frame will automatically be set as the preview image. You will NOT be able to play these files.

How to add or change a preview image

1. In the top menu, click **Assets > Manage**.
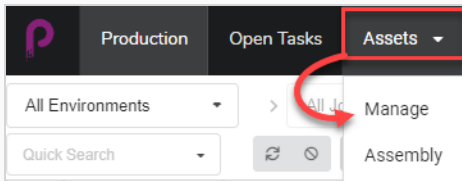
   The assets list opens.

   OR
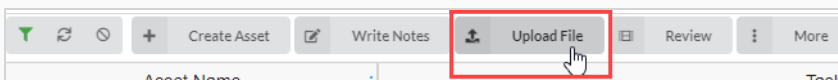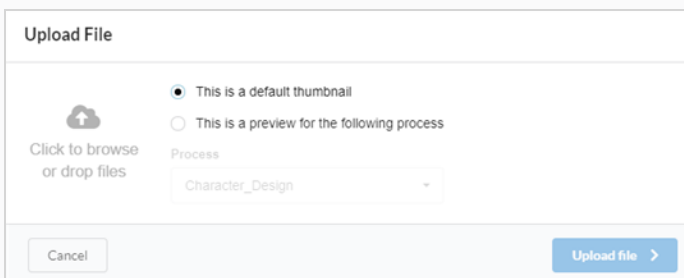
   In the top menu, click on the **Production** tab.

2. Use the All Enviroments and/or All Jobs drop-down menu filters to bring up the desired asset(s).

3. Click the check box of the asset whose thumbnail you wish to change.

4. In the toolbar above the asset list, click on the **Upload File** button.


   The Upload File dialog box appears.

5. Select one of the following options:

- **This is a default thumbnail** to upload an image or movie clip (MP4 or MOV) that will be a visual reference for all the tasks in the selected row.

- **This is a preview for the following process** to associate an image or movie clip (MP4 or MOV) with a specific task in the selected row.

  When selecting this option, the Process drop-down menu is enabled. Select the task you want to associate with the preview image from this list. After the file is uploaded, the name of the task will appear near the corner of the thumbnail.

6. To upload an image, either click on the Click to browse button or drag and drop the file over it.

Click to browse
or drop files
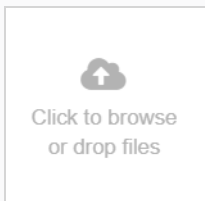
7. Click the **Upload File** button.

   The selected image/movie clip appears in the Preview column.

   > **TIP**
   >
   > To view the full-size image/movie clip, click on the Open the image in a new tab
   > icon that appears when you hover over the bottom of the preview image.

Downloading an Asset Movie Clip

Scene preview movie clips can be downloaded for viewing outside of Producer web interface.

How to download an asset movie clip

1. In the top menu, click **Assets > Manage**.

   The assets list opens.

2. If the Preview column is not displayed, in the toolbar above the assets list, enable it from the Column selector ⊞ button.

3. Hover your mouse cursor over the Preview thumbnail and click on the gear icon.
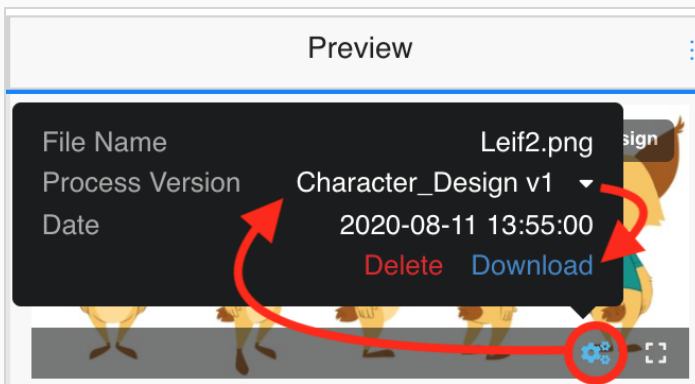
   A black dialog box appears.
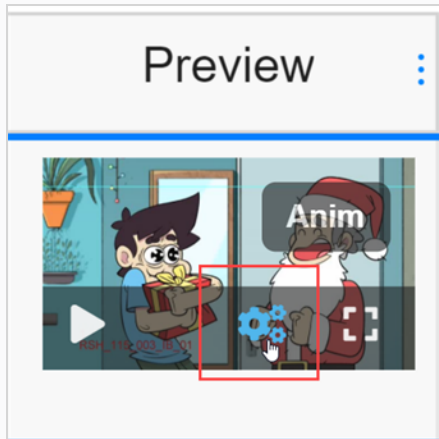
4. Click on the **Download** option.

   The movie file is downloaded to your computer.

Viewing Preview Image Versions

Producer gives you the ability to view different Preview images and movie clips associated with a certain Environment/Job/Scene/Task.
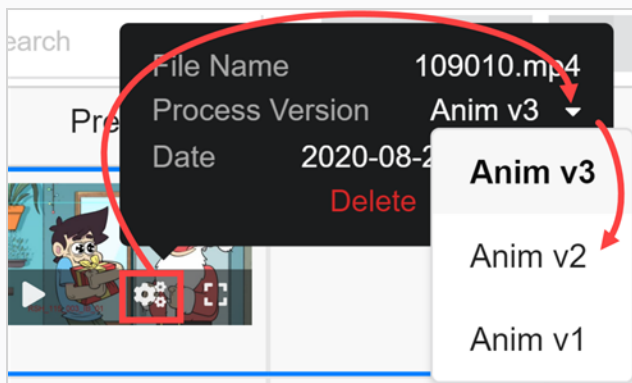
How to view different versions of Preview images and movie clips

1. Hover your mouse over a Preview image.

   A menu bar appears.

2. Click on the gear icon.

   An information and dialog box appears.

3. In Process Version, click on the down arrow.

   If different image or movie clip options exist, they appear in the drop-down list. Select the one you wish to view.

   If a Preview images or movie clip was uploaded for the global environment, it has the naming convention <default> + version number. If an image or movie clip was associated with a specific task during the upload process, it has the naming convention "task name" + version number—see

Adding a Preview Image for an Asset. In this example, the movie clip is associated with the Anim task and has 3 versions available.

4. If the image is a still frame from a movie clip, click on the play button to preview the movie clip.
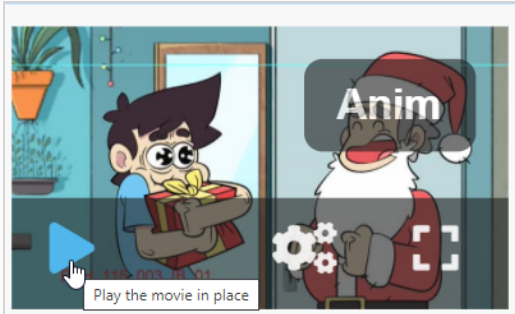
5. If you would like to see a full-size version of the image or movie clip, click on the Open the image in a new tab ⊞ icon.

Replacing Asset Tasks

If your Producer database has several asset workflows, you can change an asset's workflow by replacing all of the asset tasks with the tasks of a different workflow.

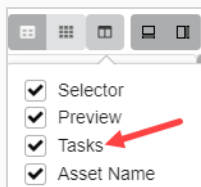## How to replace asset tasks

1. In the top menu, select **Assets > Manage**.
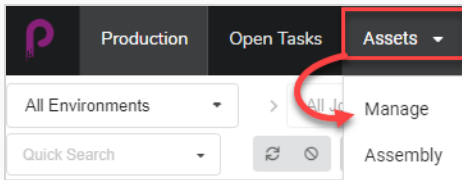
   The asset list opens.

2. Ensure the Tasks are visible by doing one of the following:

   - In the toolbar in the top-right corner, click on the Manage Columns ⊞ icon, and ensure the checkbox next to the Tasks column option is checked.
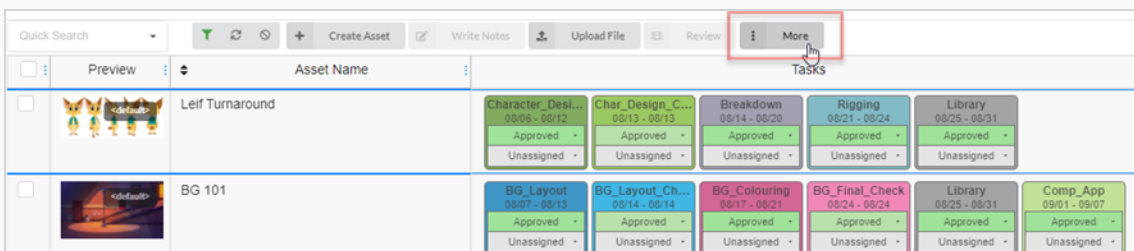

   - Select the asset in the asset list and, in the toolbar in the top-right corner, ensure the Toggle Bottom Panel ⊡ button is clicked and the bottom panel is visible. Then, in the bottom panel, select the **Tasks** tab.
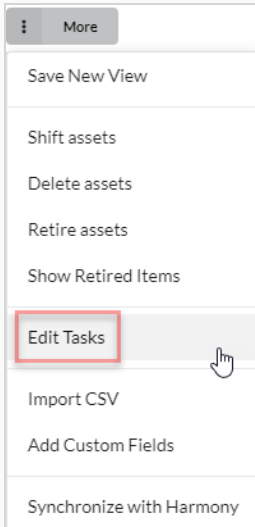
3. Click the checkbox of each asset whose workflow you wish to change.
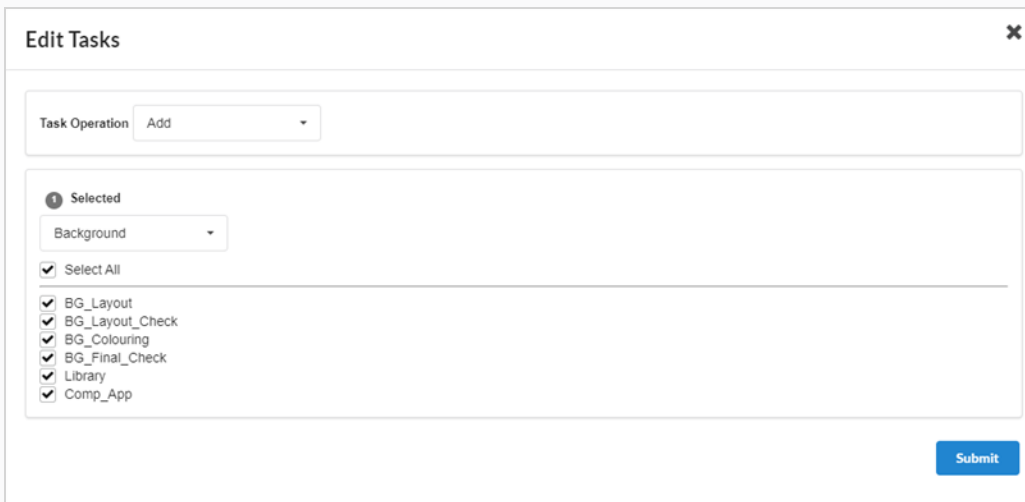

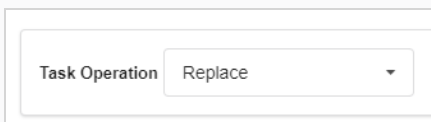4. In the toolbar above the asset list, click on the **More** button.

5. From the More drop-down menu, select **Edit Tasks**.

The Edit Tasks dialog box appears.

6. In the Task Operation drop-down menu, select **Replace**.

> **NOTE**
>
> All replaced tasks will lose their current assignees and statuses. If you select **Add** instead, missing tasks are added and existing ones are untouched—see Adding Tasks .

7. In the drop-down just below, select the workflow you wish to use.

8. By default, all the tasks in the selected workflow will be checked. If you want the selected asset(s) to only take some of the tasks in the selected workflow, uncheck the tasks that you wish to exclude.
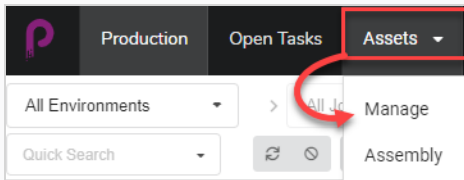

9. Click the Confirm button.

A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

Adding Tasks

When an asset is created with a workflow, all of that workflow's tasks are added to it by default. It is possible to remove specific tasks from an asset's workflow, as well as to add back tasks that were previously removed.

How to add asset tasks

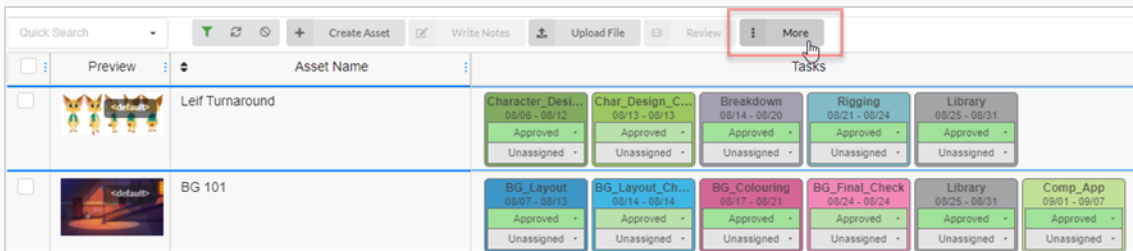1. In the top menu, select **Assets > Manage**.
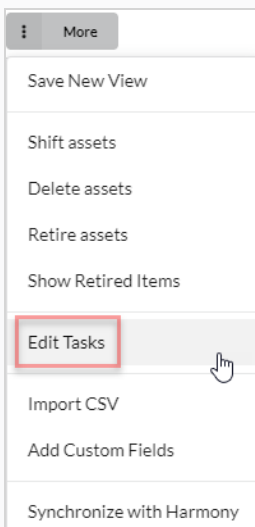

   The asset list opens.

2. Click the checkbox of each asset whose workflow you wish to change.

3. In the toolbar above the asset list, click on the **More** button.

4. From the More drop-down menu, select **Edit Tasks**.

The Edit Tasks dialog box appears.

5. In the Task Operation drop-down menu, select **Add**.

6. In the Selected drop-down menu, select the workflow you wish to use.

> **NOTE**
>
> An asset can only have one workflow, and can only have tasks from its assigned workflow. If you select a different workflow than the one that is currently assigned to the asset, tasks from the asset's old workflow will be removed, unless a task with the same name exists in the new workflow.

7. Check the checkbox for each task you wish to add. If you want to add all of the selected workflow's tasks, check **Select All**.
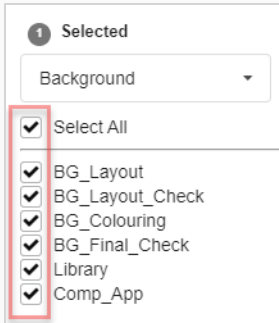
8. Click the Confirm button.

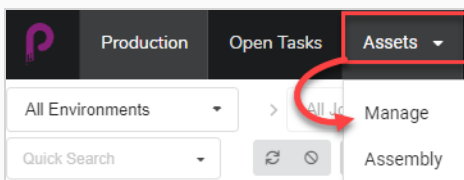A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

Removing Tasks

When an asset is created with a workflow, all of that workflow's tasks are added to it by default. It is possible to remove specific tasks from an asset's workflow, as well as to add back tasks that were previously removed.

How to remove asset tasks

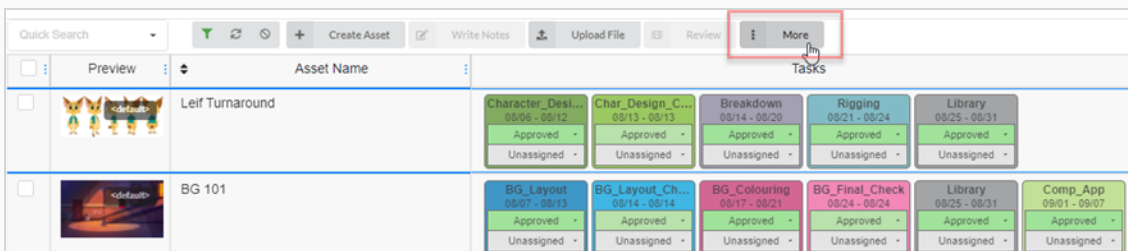1. In the top menu, select **Assets > Manage**.
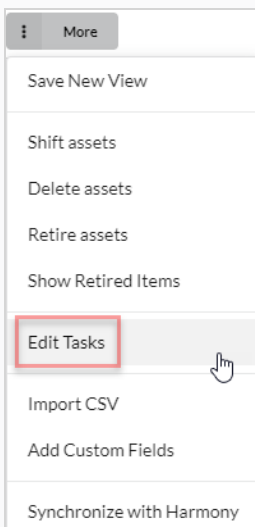

   The asset list opens.

2. Click the checkbox of each asset whose workflow you wish to change.

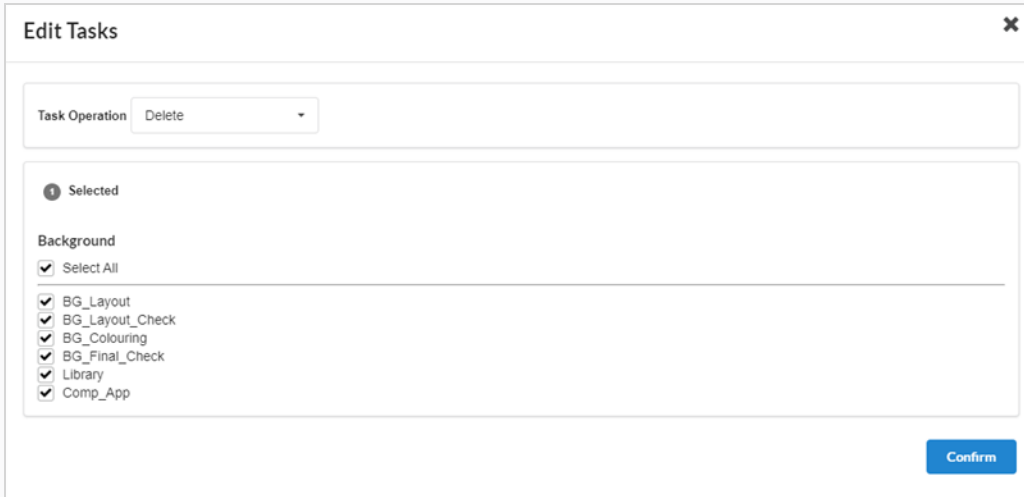3. In the toolbar above the asset list, click on the **More** button.

4. From the More drop-down menu, select **Edit Tasks**.

The Edit Tasks dialog box appears.

5. In the Task Operation drop-down menu, select **Delete**.

6. By default, all the tasks in the asset's workflow will be checked and marked for deletion. If you only want to delete some of the selected asset's tasks, uncheck all the tasks that you want to keep.

7. Click the Confirm button.

A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.
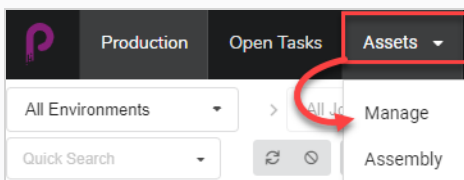
> **NOTE**
>
> You can add back the tasks that were removed from an assets workflow—see
> Adding Tasks .

Retiring Assets

When an asset is no longer needed, retiring it will hide it from view without deleting it. Retired assets can still be viewed and reactivated if needed—see [Activating Retired Assets](#).

How to retire assets

1. In the top menu, select **Assets > Manage**.
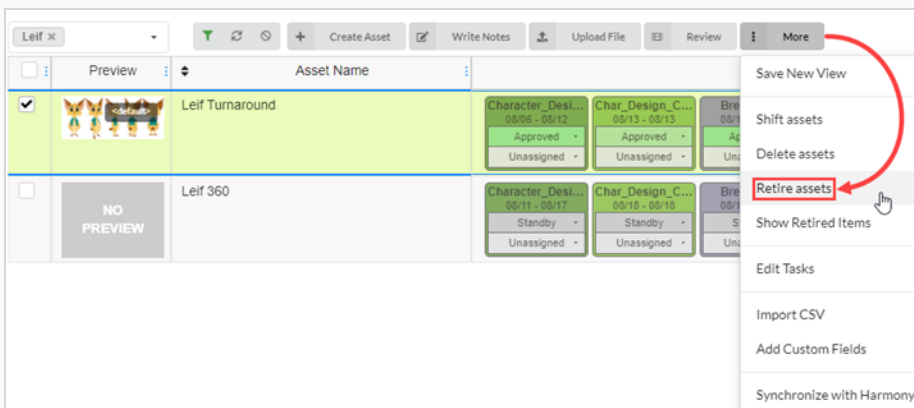

   The Asset list opens.

2. Click on the asset whose information you would like to view.

3. Enable the checkbox on the far left column of each asset for which you want to retire.
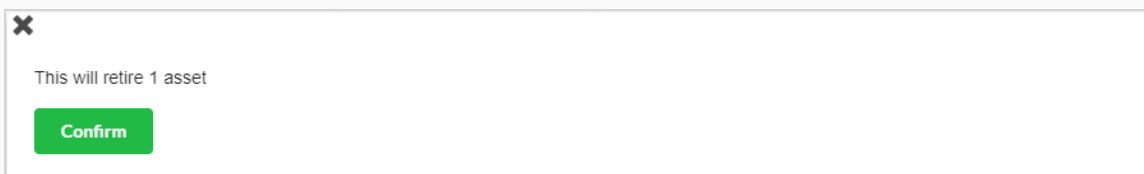

4. In the toolbar above the asset list, select **More > Retire Assets**.

   The Confirm dialog box opens.

5. Select **Confirm**.

   The retired assets is now hidden from view.

Viewing Retired Assets

Assets that have been retired are hidden from the Production page, but can be viewed if needed.
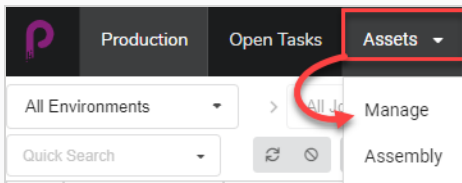
> **NOTE**
>
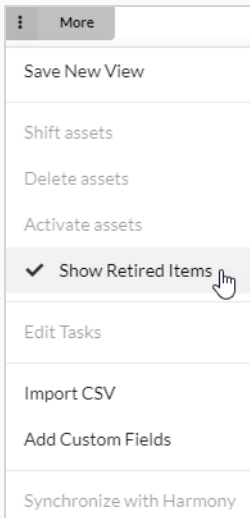> To retire assets, see Retiring Assets.

How to view retired assets

1. In the top menu, select **Assets > Manage**.

   The Asset list opens.

2. In the toolbar above the asset list, select **More > Show Retired Items**.

   Retired items appear.

> **NOTE**
>
> To hide retired assets, in the toolbar above the asset list, select **More**. A checkmark will be visible beside Show Retired Items. Select **Show Retired Items** to disable it.
>
> The retired elements are now hidden from view.

Activating Retired Assets

Assets that have been retired and hidden from view can be restored so they will appear in the asset list. This is referred to as activating assets.

How to restore retired assets

1. In the top menu, select **Assets > Manage**.

   The Asset list opens.

2. In the toolbar above the asset list, select **More > Show Retired Items**.

   Retired items appear.

3. Select the Assets you wish to Activate by using the check box to the far left of the screen.

4. Select **More > Activate Assets**.
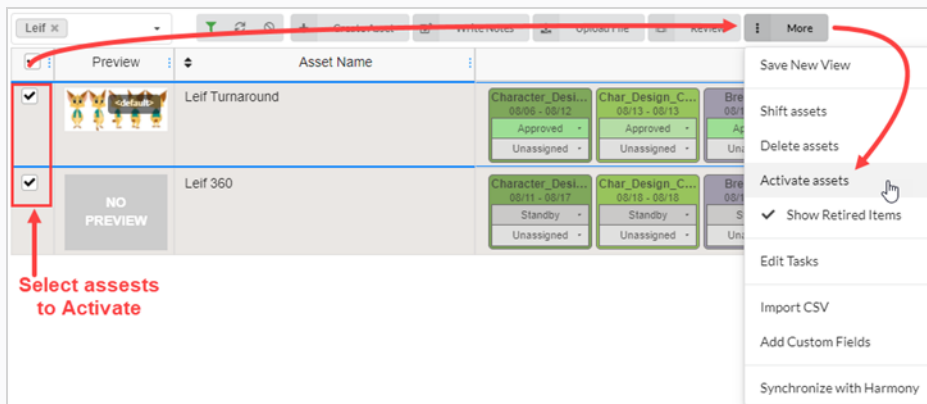
5. In the confirmation prompt, click **Confirm**.

The retired assets are now visible in the asset list.

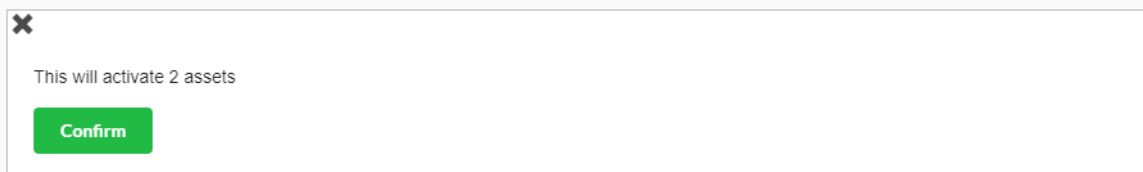# Chapter 6: About Monitoring the Workload

Tasks are at the heart of tracking your production with Producer. They can can be automatically created when new scenes are added or they can be created manually. Tasks are the practical form of the processes that make up workflows.

Tasks have different possible statuses and can be assigned to different users.

Tasks are usually created automatically because workflows have a default setting to automatically create tasks. When you create an item, such as a scene or an asset, and you select a workflow using the auto-create setting, all the processes of this workflow will be converted into actual tasks for this item.

Assigning Tasks

Each Task in any Workflow can be assigned to a specific user.

To assign multiple tasks to a particular user you can select one scene at a time and change to the required user or use the check boxes on the side of the screen and select the box of the designated scenes to be assigned. and in the Task in the Unassigned drop down menu select the appropriate user.
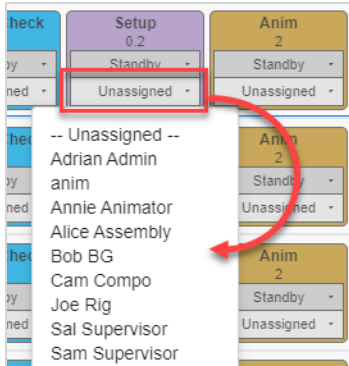
How to assign a task

1. In the top menu, select **Production** or **Assets > Manage**.

2. Select the environment and job containing the scenes to assign.

3. In the column corresponding to the task, in the Assigned drop-down menu (bottom), set the asset/task owner.

   - To assign multiple tasks at the same time, in the left-most column, enable the check box for all the scenes to assign and then assign the task owner.

Checking Open Tasks for Work and Notes

In Producer, every user receives their own unique login credentials. The individual users will have a predetermined limit of access to Producer depending on their duties within the animation pipeline. Every user will have the ability to check for Tasks and Notes that have been specifically assigned to them in the Open Tasks page.

How to check Open Tasks for work and notes

1. In the top menu, select **Open Tasks**.
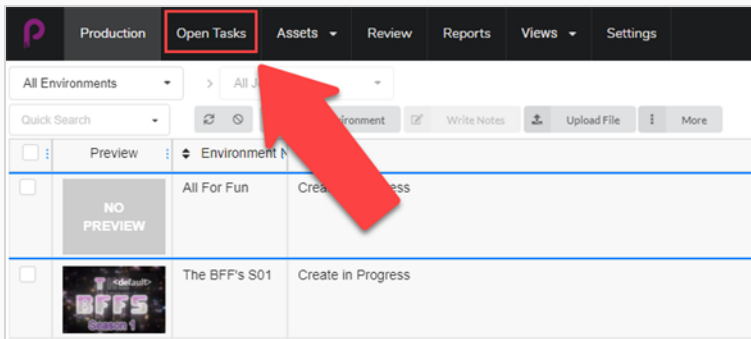
2. In the Open Tasks view, use the search toolbar to filter work and update tasks.
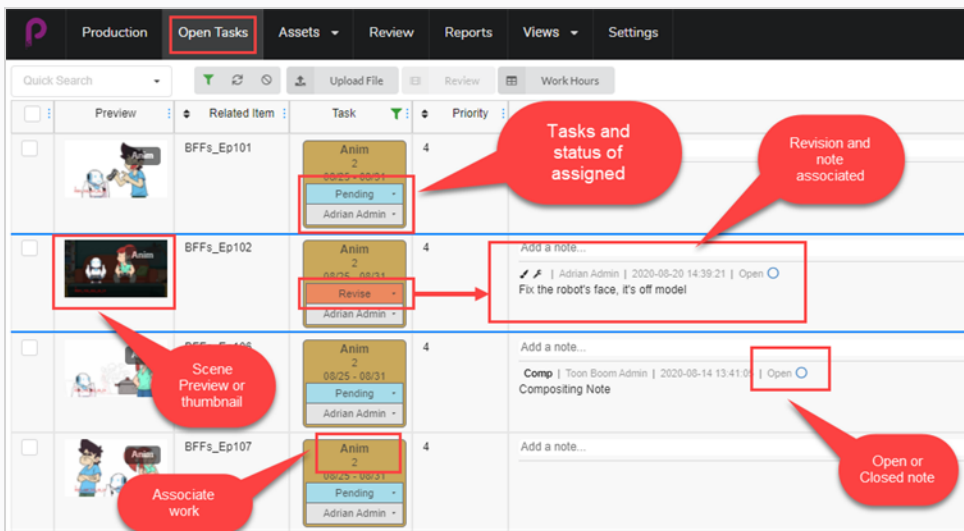
Updating Status Manually

In the Production, Open Tasks, and Assets views, you can set the status for various tasks.

How to update a status

1. In the top menu, select **Production**, **Open Tasks** or **Assets > Manage**.

2. Select the environment and job containing the status to update.

3. In the column corresponding to the task, in the Status drop-down menu (top), set the asset/task status.

   - To set multiple statuses at the same time, in the left-most column, enable the check box for all the scenes to update and then set the new status.

   > **NOTE**
   >
   > You can change it depending on the workflow of the production and your need within that workflow. Depending on how the workflow is set up there could be some triggers involved with other statuses.

Logging Work Hours

Producer allows users to track work by hours. In the Open Tasks view, a user can log the hours worked on each task on specific dates.

How to log work hours

1. In Open Tasks, click on the **Work Hours** tab at the top of the task window.

   The Work Hours window opens.
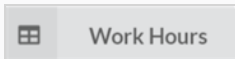
2. Here you can select a number of options.

   - In the Date Range field, select the date range.

   - Use the Search toolbar to search for a particular task.

   - Enable or disable the Hide Approved option to hide all approved work.

   - For each task, enter the number of hours worked in the corresponding day field.

3. When finished, select **Done**.

Uploading and Updating Snapshots

If Producer is not integrated with Harmony or any other option updating the task snapshot automatically, a user can manually upload a snapshot.

If Producer is integrated with Harmony, you can push the asset snapshot automatically from Harmony using a script.

How to upload a snapshot manually

1. In Open Tasks, check the box on the far left for the scene(s) you wish to upload a image or video.

2. Select **Upload File**.
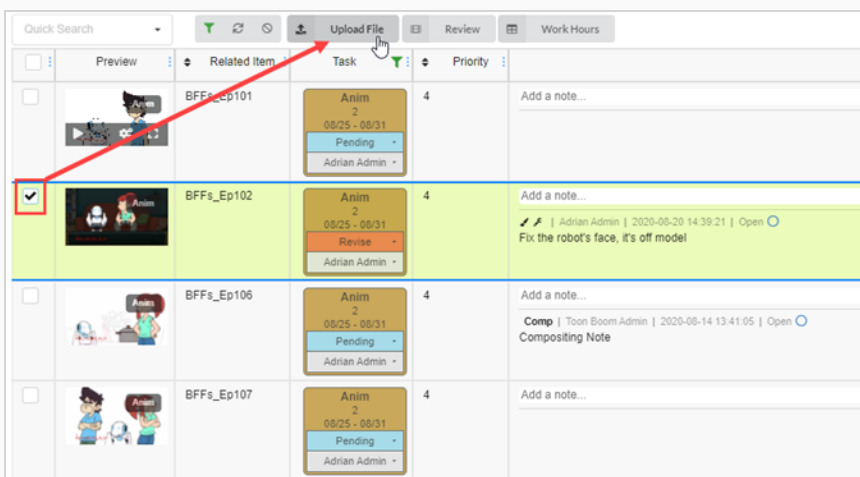
The Upload Preview window opens.
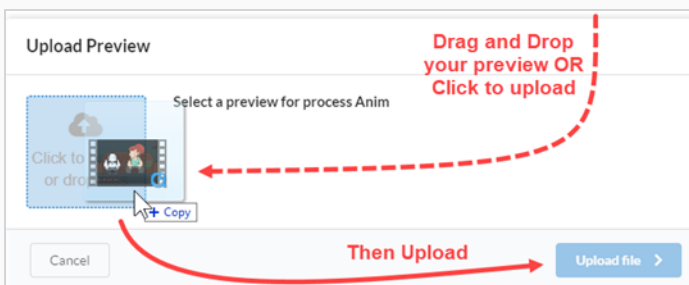
3. In the Upload Preview window, you can either drag and drop your new preview or click and upload it.

4. Select **Upload**.

5. In the Image area, select the Gear icon that appears when you hover your mouse over the window.

A new window opens.

6. Here you can view the old preview and the new one. Producer automatically makes the latest upload the default preview.
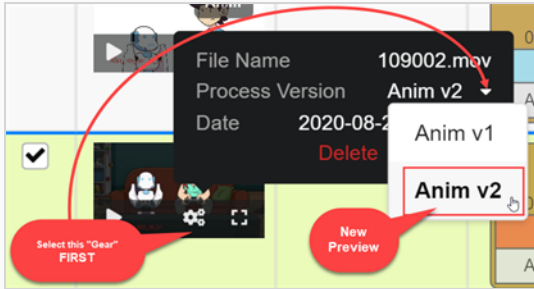
How to upload an Asset snapshot from a Harmony scene

1. In Harmony, select the Asset Snapshot script within the asset scene you wish to upload.

   A new window opens.

2. The window may display an error at first because it associates the scene name as an asset. Enter in proper asset name.
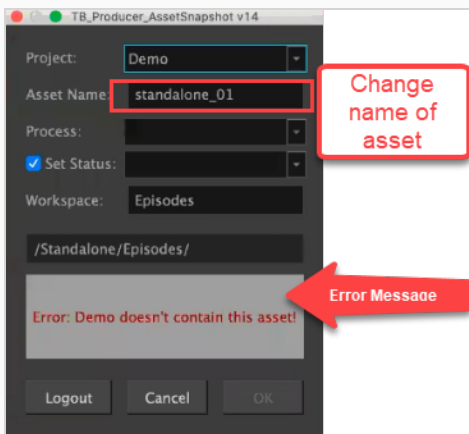
   Harmony then communicates with Producer to recognize the Process you have in place.

3. Set your Process and set your Status (keep the box to the left checked).

4. Click OK.
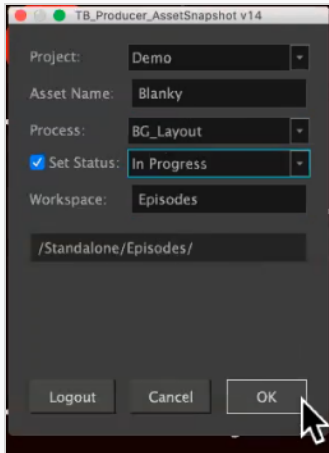
A new window will open showing the progress in Rendering Preview.
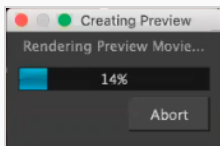
The Preview Confirmation dialog box opens.

5. Select **Upload**.
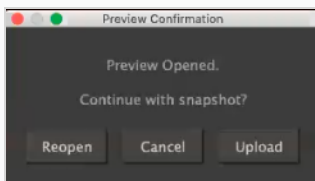
A confirmation window opens.
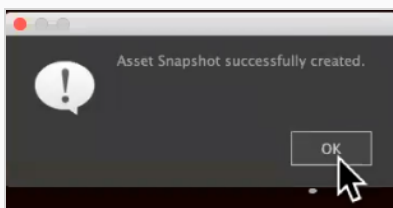
> **NOTE**
>
> If you view your asset in Producer, they will have a Harmony icon in the preview window linking directly to the original Harmony file.

129
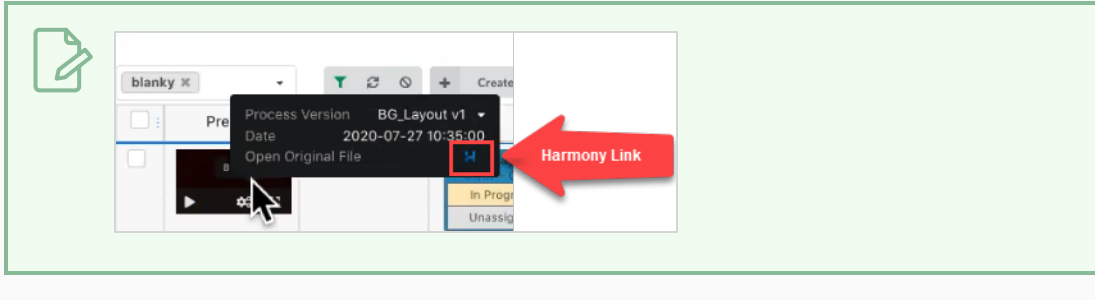
Verifying a User's Workload

You can filter the Production and Asset lists to see tasks assigned to a user.

How to filter the production table

1. In the top menu, select **Production** or **Assets > Manage**.
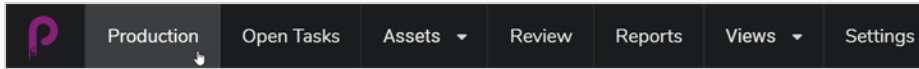
    The Production page opens.

2. Select the Environment for which you want to see the workload and assignments.

3. Click on the Toggle Search Panel button at the top.
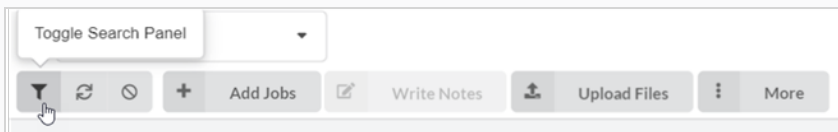
    The Custom Fields window opens.
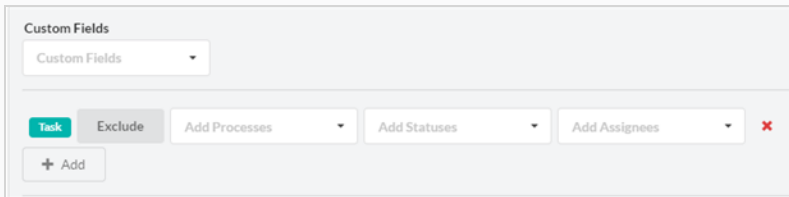
4. Click the Add + option to add more custom fields as well as use the existing fields to Exclude any of the selections.

    - In the Add Processes menu, depending on the workflow you selected you get a drop down window similar to this:
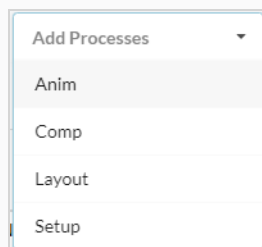
    - In the Add Statues, depending on the workflow you selected you get a drop down window similar to this:
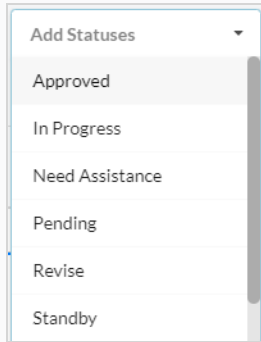
- And in the final drop-down, Add Assignees, it is limited to the users assigned for this particular production.

5. When ready, select **Apply Search Criteria** in the bottom right corner of the window.

> **NOTE**
>
> There is no limit to the amount of filters you can Add or Exclude from your search criteria.

This search is not limited to just one episode. You can put your search criteria to include across all episodes within this production.
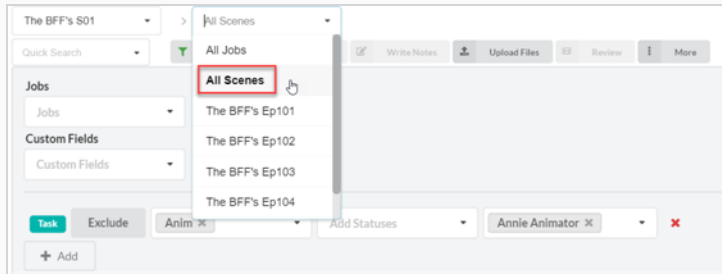
Creating Custom Fields

Custom Fields are fields or columns that can be added by user profile to match something they want to track that Producer isn't tracking by default, ie: Difficulty of a scene.

How to create custom fields

1. To add a custom field click on the More tab and select Add Custom Fields.
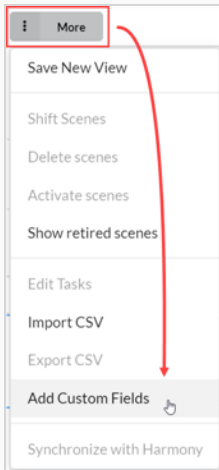
   The Add a Custom Field window opens.

2. In the Name field, enter the name of the new custom field.

3. In the Description field, you can add an optional Description.

4. Click **Create**.

5. Open the Field Selector, and check the new custom field.
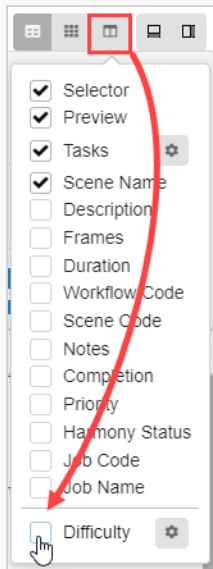
6. To modify the new custom field, select the scene or asset for which you wish to edit the custom field value.

7. Open a side panel and select **Details > your custom field**.
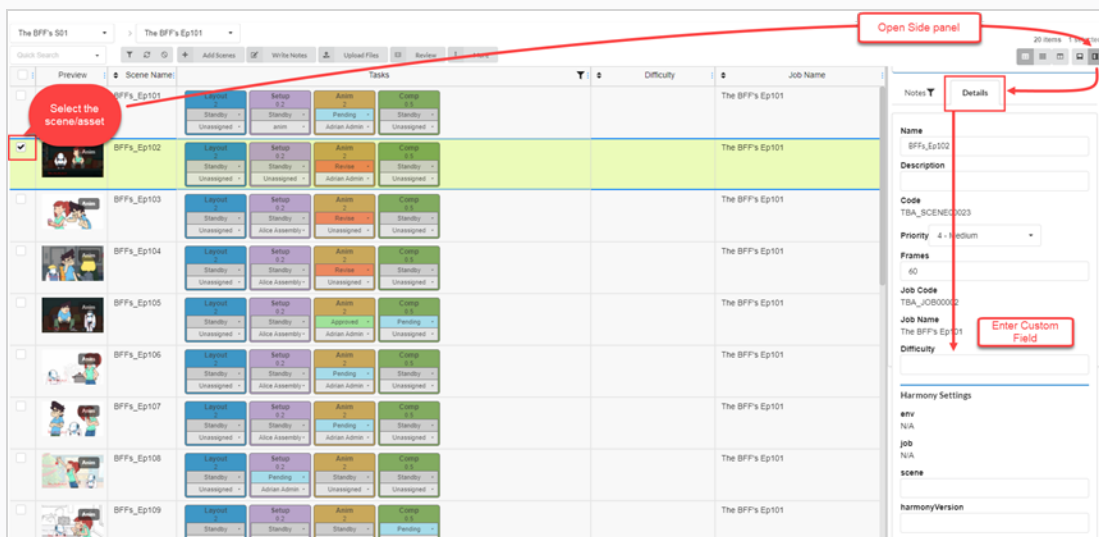
Your entry now appears in the custom field.

> 📝 **NOTE**
>
> Everyone in the production will be able to view the custom field. Only certain users will have the ability to add them.

Searching in Producer

In Producer there is a Quick Search located in the Production, Open Task, Assets and Review views. This can be used to quickly find a environment, scene, asset, or numerous other items.

Quick Search	▾

How to search in Producer

1. In the Quick Search field, type a keyword to filter the production table.

2. When done, beside the search field, click the Clear Filter ⊘ button.
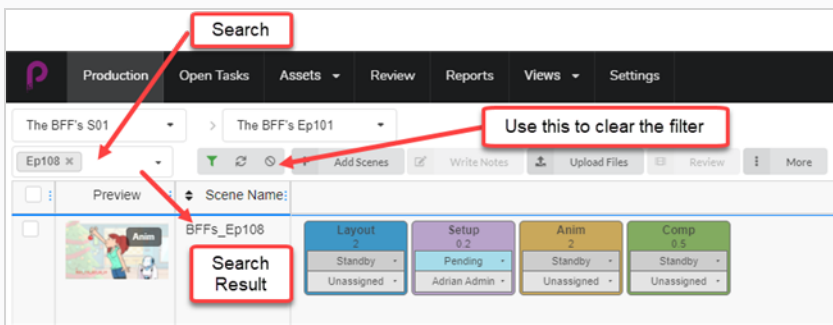
Chapter 7: About CSV Import and Export

Import CSV files in Toon Boom Producer to automatically create empty assets, scenes, jobs, and environments and populate additional fields such as Description, Name, and, Note.

Export CSV files from Toon Boom Producer to gather information such as asset lists and details.

About Creating a CSV File

Before creating your CSV file, review the notes below:

- When creating the data in the spreadsheet application, set numbers with padding as Text format to preserve the preceding zeros.

- You are responsible to avoid doubling the asset and scene names in your spreadsheet. Producer will not accept duplicate names and will suggest skipping the problematic entries.

- 2-bit characters and special characters can be imported via CSV file upload only. It will not work by copying and pasting data directly in the Producer Import CSV dialog box.

- Create your CSV file as a UTF-8 format (8-bit Unicode Transformation Format) to support special characters.

- When creating a sample header row for your columns, use the exact Producer column name to automatically match the data. You will be able to reassign the columns directly in Producer before completing the import process. Use name in lowercase for the scene or job name to be assigned to the Name column.

- To create scenes, you need to add a column containing the matching Job code. For more information, see Displaying the Environment and Job Codes.

- To create jobs, you need to add a column containing the matching Environment code. For more information, see Displaying the Environment and Job Codes.

138

Displaying the Environment and Job Codes

When creating a CSV file to create scenes or jobs, you need to include the job code, in which these scenes will be created or the environment code, in which the new jobs will be.

How to display the Environment code:

1. In the main menu, select **Production**.
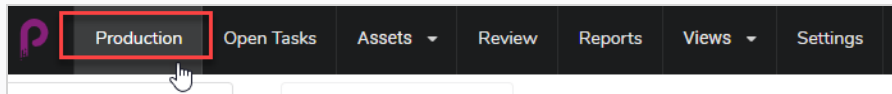
2. Use the Environments drop-down menu, under the main menu, to navigate to an environment list.

3. In the Production toolbar, click on the Column Manager icon.
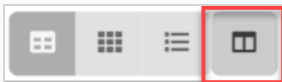
4. In the Column Manager, enable the **Environment Code** column.
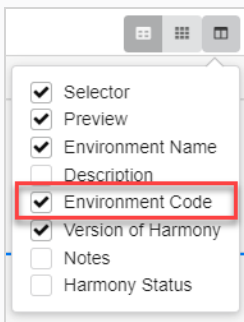
The Environment Code column appears in the list of environments.
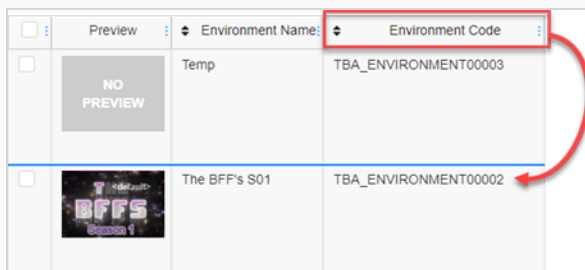
How to display the Job code:

1. In the main menu, select **Production**.
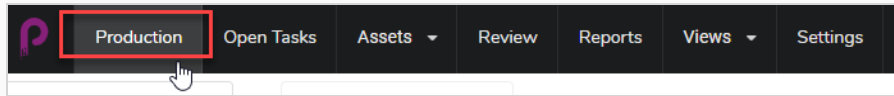
2. Use the Job drop-down menu, under the main menu, to navigate to a job list.

3. In the Production toolbar, click on the Column Manager icon.
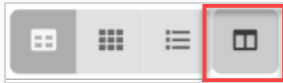
4. In the Column Manager, enable the **Job Code** column.
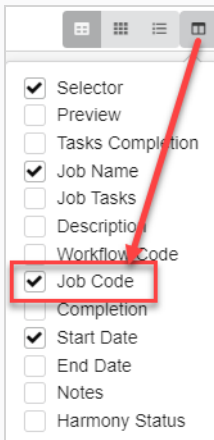
The Job Code column appears in the list of jobs.
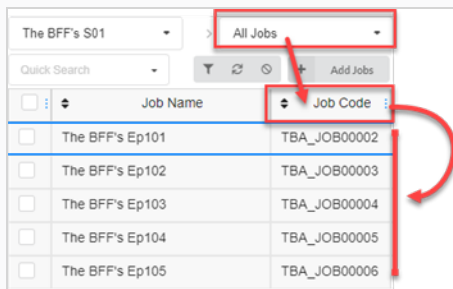
Uploading a CSV File and Copy/Pasting Data

When your data is ready, you can import it in Producer. You can also copy and paste your data directly from your spreadsheet to the Producer Import CSV dialog box without creating a CSV.

How to upload a CSV file or copy data from a CSV file:

1. Go either to **Assets > Manage.**
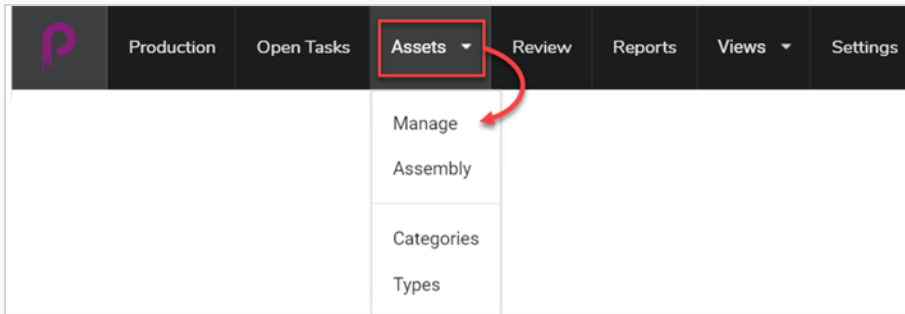
   Or navigate to the Environment, then to the Job where you want to create items from your CSV data.

2. Click on the **More** tab and select **Import CSV.**
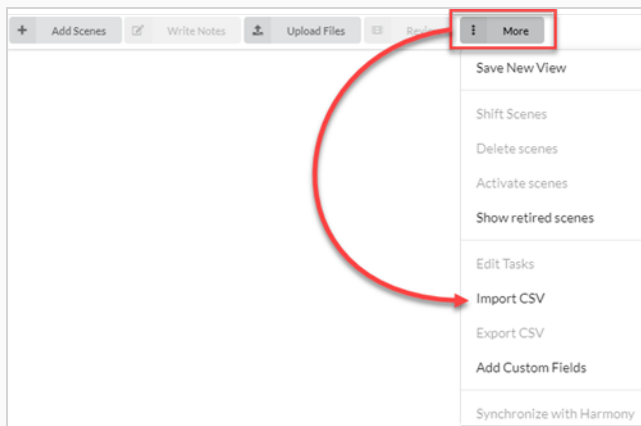
   The Import CSV dialog box opens.
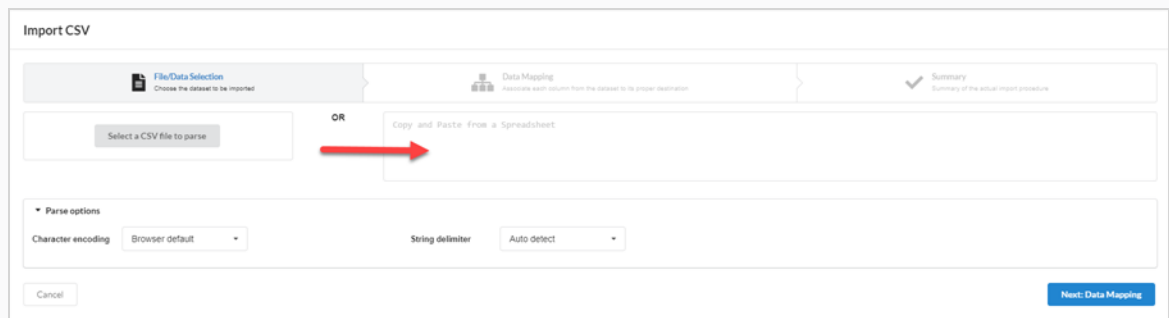
3. In the Import CSV dialog box (if a CSV is already created), click on the Select a CSV file to parse button and browse for your CSV file. Alternatively, you can paste it into the Copy and Paste from a Spreadsheet area.

Select a CSV file to parse

4. Set up your String Delimiter to **Auto detect**.
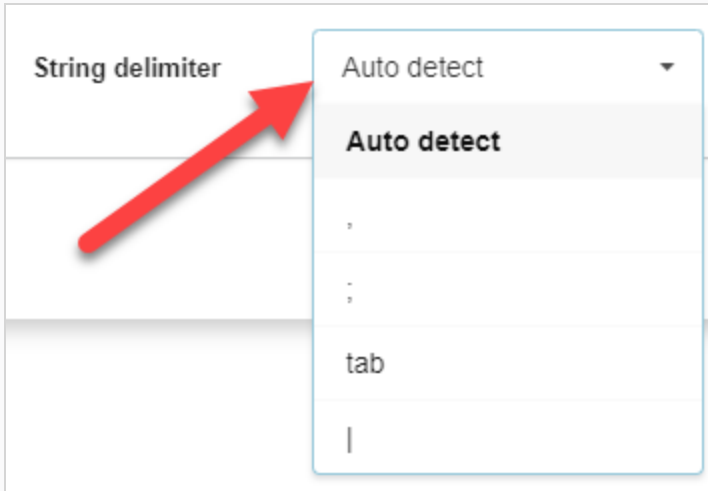
5. Click on the **Next: Data Mapping** button.
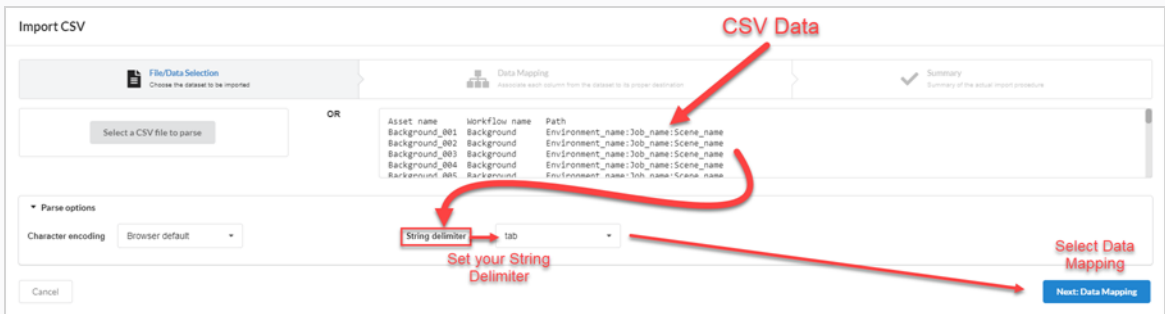
6. Click on the **Next: Verify** button.
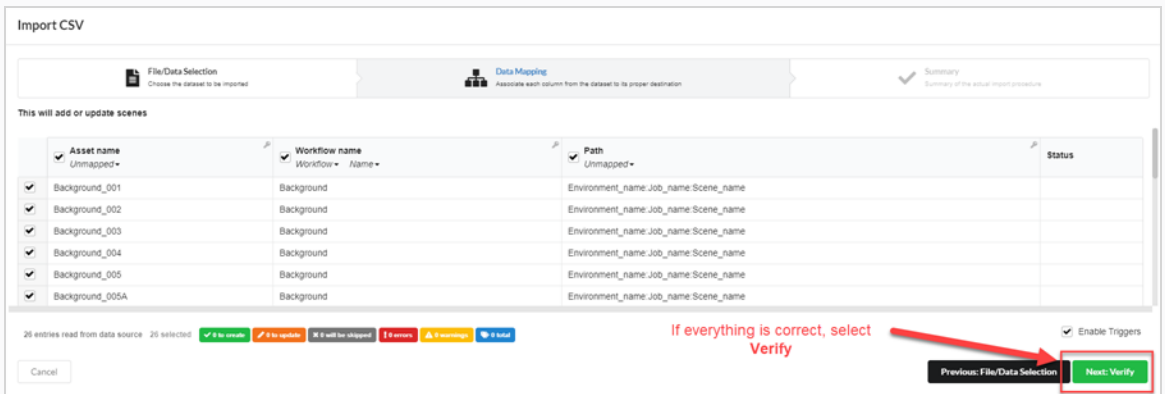
NOTE

If the CSV file format doesn't match the default value, Producer will display a warning.

Chapter 8: About Assembly

Assembly is the process of associating assets with environments, jobs and scenes that require those assets so as to track which assets must be completed before work on these environments, jobs and scenes can begin. An asset can be assembled with as many environments, scenes and jobs as needed, and environments, jobs and scenes can be assembled to as many assets as needed.

Whether you associate an asset with a scene, job or environment can depend on how much it is used. For example:

- If an asset will only be used in one or a couple scenes in an episode, it makes sense to assemble it with each scene in which it is used.

- If an asset is to be used throughout one or a few episodes, it makes sense to assemble it with each job representing each episode in which it is used.

- If an asset will be used throughout an entire season or an entire series, it makes sense to assemble it with each environment in which it is used.

Assets that have been assigned to scenes can be viewed from the Production page. In the Job Tasks column for a given scene, the progress process wheel will display the number of assets assigned to it in the centre, and the completion percentage in the wheel.

The Assembly page also allows you to search and filter assets.

Navigating and Searching the Production List

The left area of the Assembly page is where you can navigate your production to locate the right environment, job or scene, and the right area of the page is where you can browse through and search for assets.
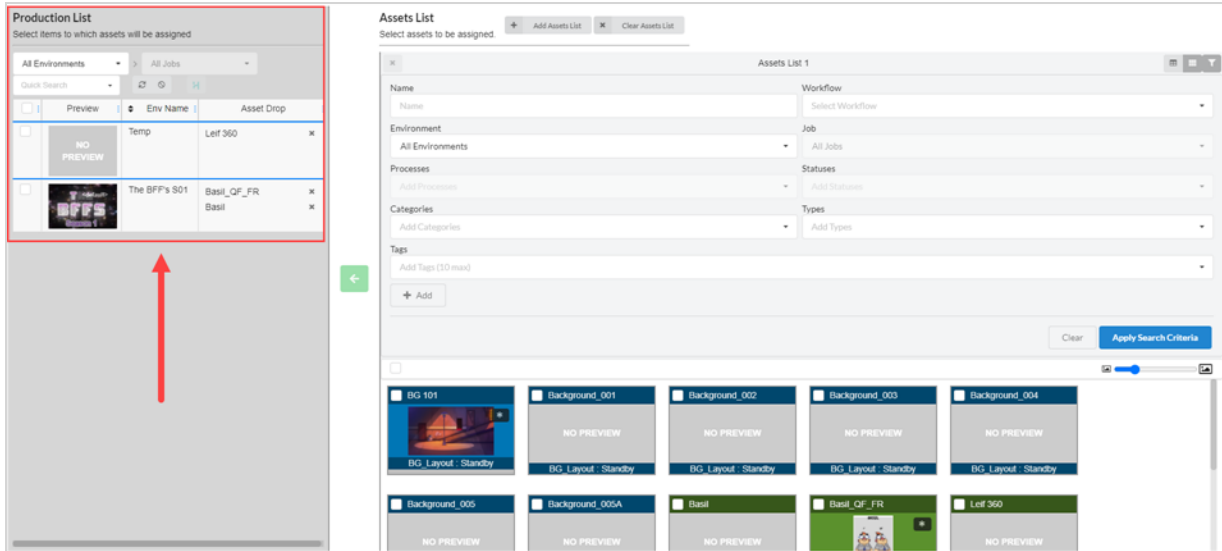
The first step to assembling is browsing through the Production List panel to find the item you want to associate assets with.

How to search the production list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens and the Production List panel appears to the left.

2. In the Production List panel, navigate to the production item with which you want to assemble assets:

3. To assemble assets to an environment, in the environments drop-down in the Production List panel, select **All Environments**.
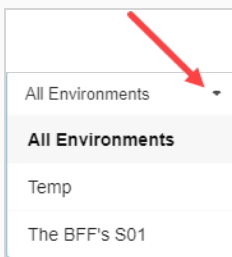
4. To assemble assets to a job, in the environments drop-down menu, select the environment containing the job you want to assemble assets with.

5. To assemble assets to a scene:

- in the environments drop-down menu, select the environment containing the scene you want to assemble assets with.

Production List
Select items to which assets will be assigned

The BFF's S01 ▾	All Jobs ▾		

☐ ⋮	Preview ⋮	⬍ Job Name ⋮	Asset Drop ⋮
☐	NO PREVIEW	The BFF's Ep101	
☐	NO PREVIEW	The BFF's Ep102	
☐	NO PREVIEW	The BFF's Ep103	
☐	NO PREVIEW	The BFF's Ep104	
☐	NO PREVIEW	The BFF's Ep105	
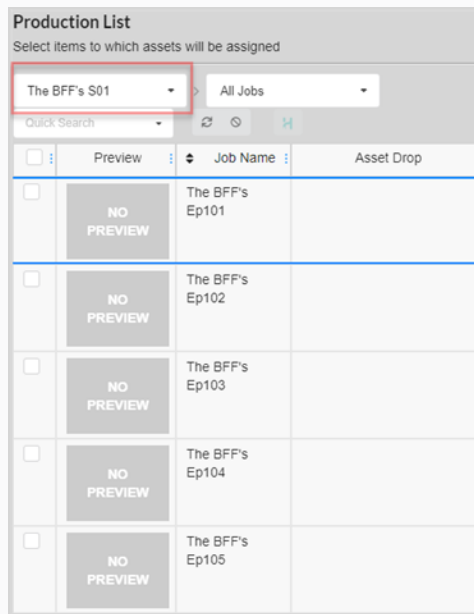
- In the Job drop-down menu, select the job containing the scene you want to assemble assets with.
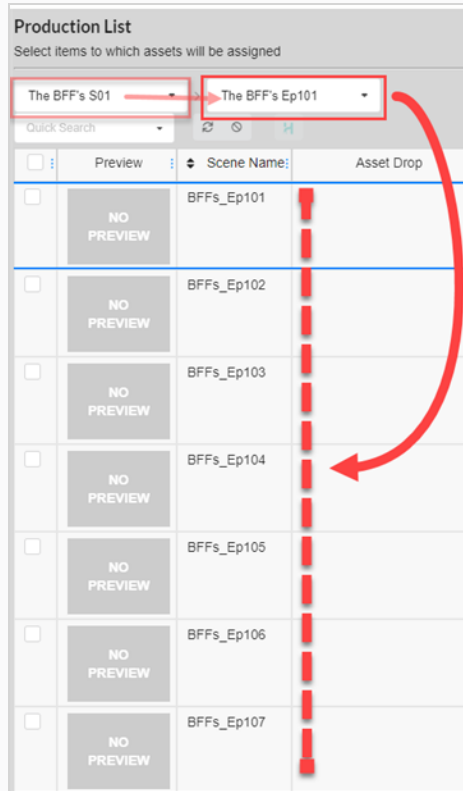
6. To filter the listed items based on keywords, in the Quick Search text box, type in all or part of the name of the environment, job or scene you want to find. Then hit the Enter key to add what you typed to your search terms.

Only items containing your search term appear in the list.

> **NOTE**
>
> You can repeat this step to add several search terms. Only items containing all of your search terms in their name will appear in the list.
>
> You can remove a search term by clicking on the Close ✖ icon in the search terms box. You can also press Backspace to delete the last search term.

7. To list all items again, do one of the following:

   - Click the Remove ✖ icon on all search terms in the text box or hit the Clear all filters ⊘ button.

   - Press the Backspace key to remove the last search term until all the search terms have been erased.

Browsing and Finding Assets

The second step to assembling assets with environments, jobs or scenes in your production is to find the assets you want to associate to the items in the Production List.

When you open the Assembly page, the list of all the assets for your project is displayed in the right area, in a panel labelled Assets List. If you don't have a lot of assets, you can simply scroll through your assets and find the assets you want to assemble. Otherwise, you can use the extensive set of search and display options to find the right assets.
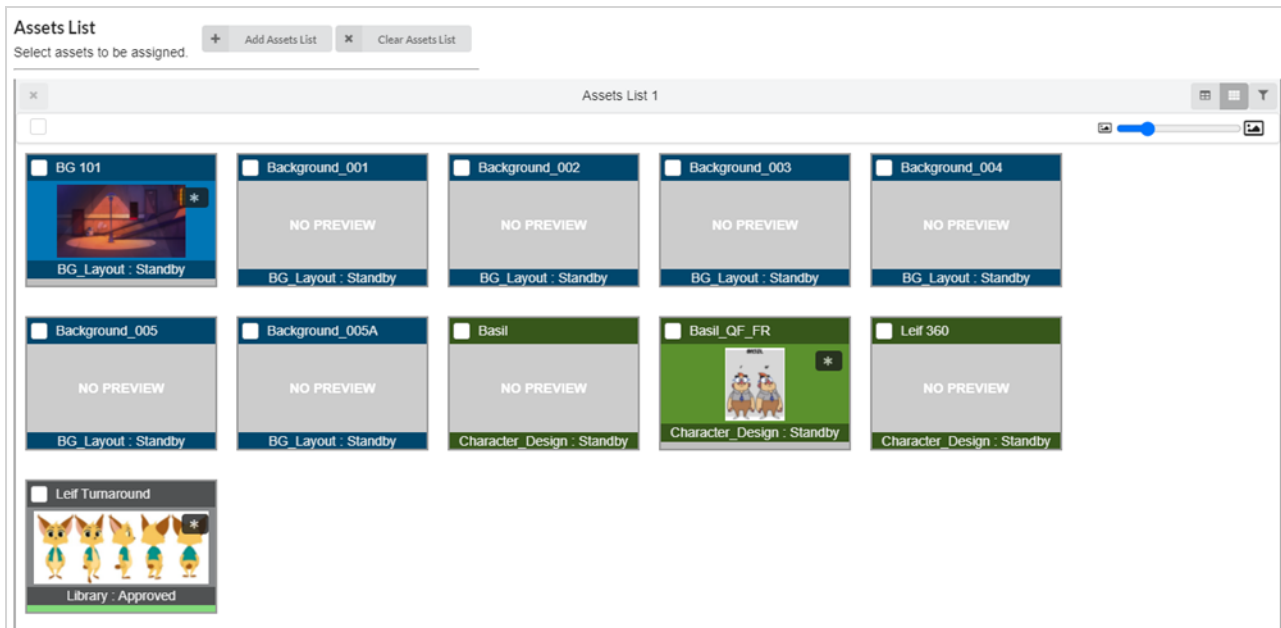
It is also possible to have several lists of assets in the Assembly page, each one taking a part of the space reserved to the assets list. Each list can have its own unique search filters and display settings.
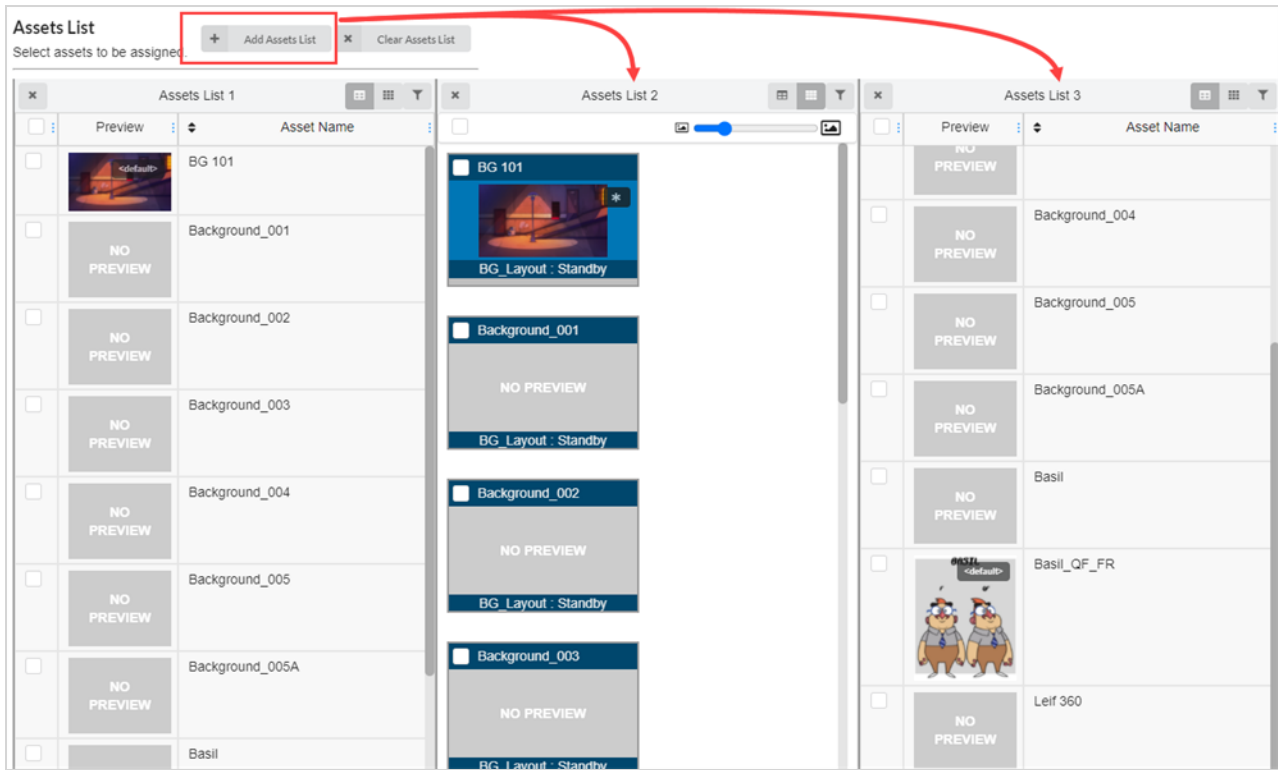
How to change the size of thumbnails in the assets list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens. The Asset List panel appears to the right.

2. Ensure the Asset List is in tile mode by clicking the Tiles icon.
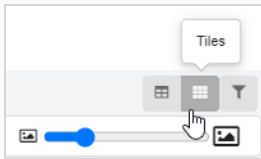
3. To change the size of the assets:

4. Click and hold the icon in the middle of the slider, then drag it to the left to make the icons smaller, or right to make the icons larger.

How to change the display mode of the assets list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens. The Asset List panel appears to the right.

2. Do one of the following:

   - To view the Asset List in tile mode, click **Tiles**.

   - To view the Asset List in list mode, click **List**.
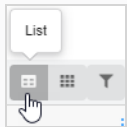
How to filter assets in the assets list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens. The Asset List panel appears to the right.
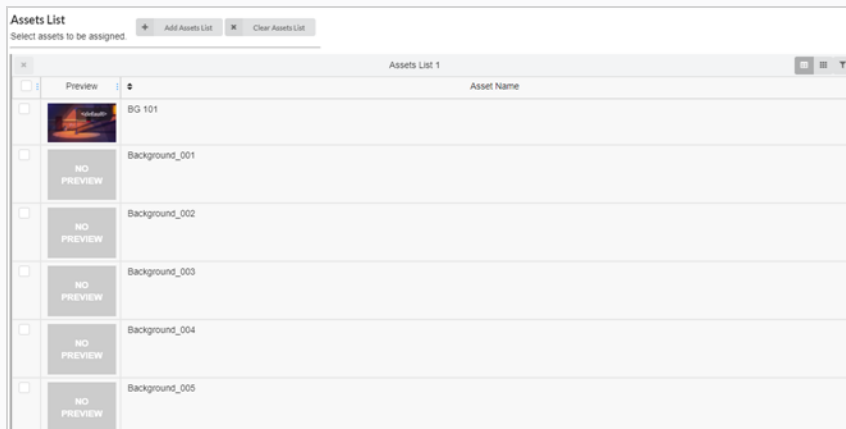
2. In the top-right corner of the Assets List panel click the Toggle Search Panel ![icon] icon.

   The search panel appears below the toolbar.
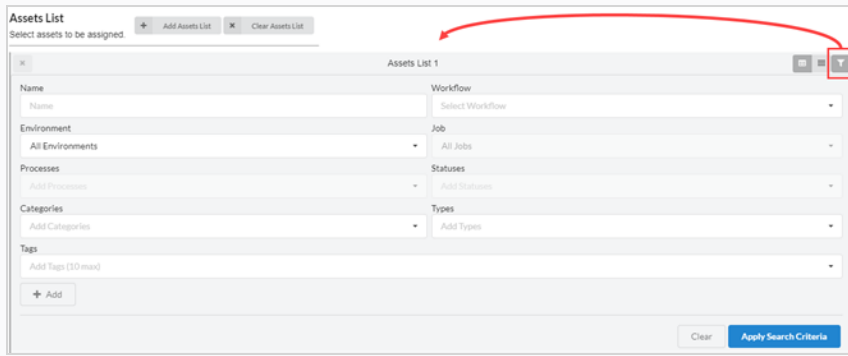
3. Do one or several of the following to filter the list of assets to the assets you want to assemble:

    - In the Name field, type in the name, or part of the name, of the asset you are searching for.

    - In the Workflow drop-down menu, select the workflow associated with the asset you are searching for.

    - If the asset you are searching for was already assembled with an environment, in the Environments drop-down menu, select the environment the asset you are searching for is associated with.

    - If the asset you are searching for was already assembled with a job, in the Jobs drop-down menu, select the job for the asset you want to search for.

    - If the asset you are searching for was assigned a specific process, in the Process field, select the process assigned to the asset you are searching for.

    - In the Statuses field, select the status for the asset you want to search for.

    - In the Categories field, select the category for the asset you are searching for.

    - In the Types field, select the type for the asset you want to search for.

4. Click Apply Search Criteria at the bottom of the search toolbar.

    The assets that match your criteria appear in the list of jobs.

5. To display all assets again, click the **Clear** button at the bottom of the search panel.

    All of the assets are now displayed in the asset list.

How to add an assets list

1. In the top menu, select **Assets > Assembly**.

    The Assembly page opens. The Asset List panel appears to the right.

2. At the top of the Asset List, select **Add Assets List**.

    An additional asset list appears on the right.
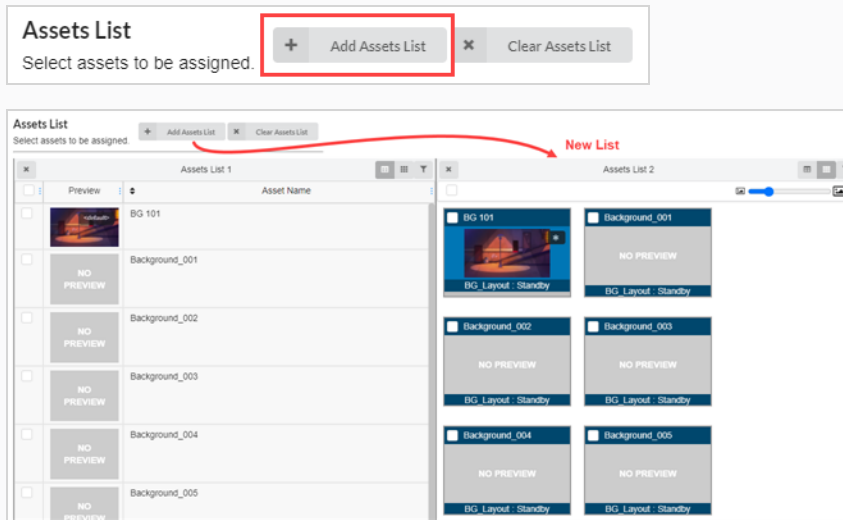
3. To rename an asset list, click anywhere at the top of the list around the current name.

   The text box can now be edited.

4. Type in a new name for the asset list in the text box, then click anywhere outside of the text box.
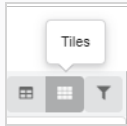
   The asset list has now been renamed.

How to remove an assets list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens. The Asset List panel appears to the right.

2. If there is more than one asset list, click on the Remove ✖ icon to the top left of the asset list you wish to remove.

   The asset list has now been removed.

How to remove all extra assets list and reset the first assets list

1. In the top menu, select **Assets > Assembly**.

   The Assembly page opens. The Asset List panel appears to the right.

2. If there is more than one asset list, select **Clear Assets Lists** at the top of the Asset List page.

   All but the original asset list are removed.
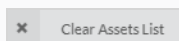
Assembling

You can assemble assets by associating assets with the environments, jobs, and scenes in which they are used. If an asset is only used in a few scenes, it can be assembled to those scenes; if it is only used in a few episodes, it can be assembled to said jobs; if it will be used throughout an entire series season, it can be assembled to an environment.

How to assemble one asset at a time

1. In the top menu, select **Assets > Assembly**.

   The Asset List opens.

2. Locate the environment/s, job/s, or scene/s you want to associate the asset to from the production List—see [Searching Production List](#).

3. Locate the asset you want to associate to an environment, scene or job from the Assets List.

4. Click the asset you wish to assign, and drag it over to the Asset Drop column to the item you wish to assign it to.
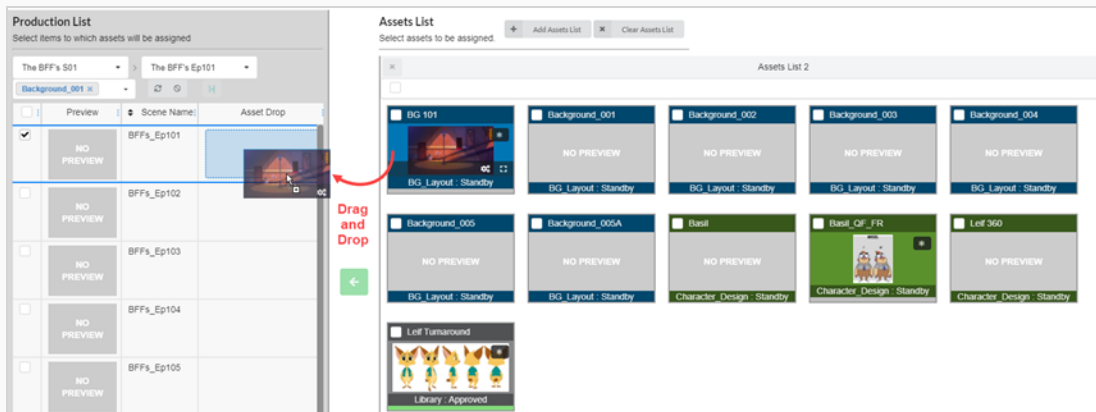
The asset is now listed in the Asset Drop column.
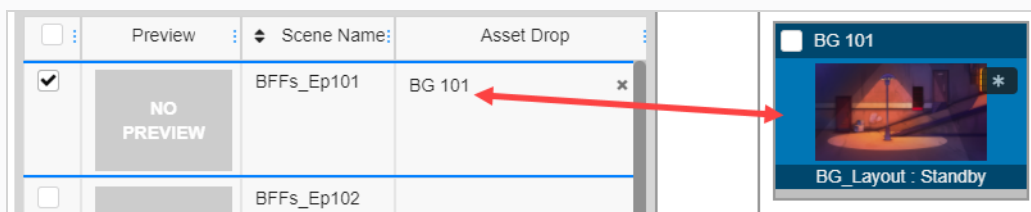
How to assemble multiple assets at once

1. In the top menu, select **Assets > Assembly**.

   The Asset List opens.

2. Locate the environment/s, job/s, or scene/s you want to associate the asset to from the production List—see Searching Production List.

3. Select the item by checking the checkbox on the far left column of each item you wish to associate the asset to.
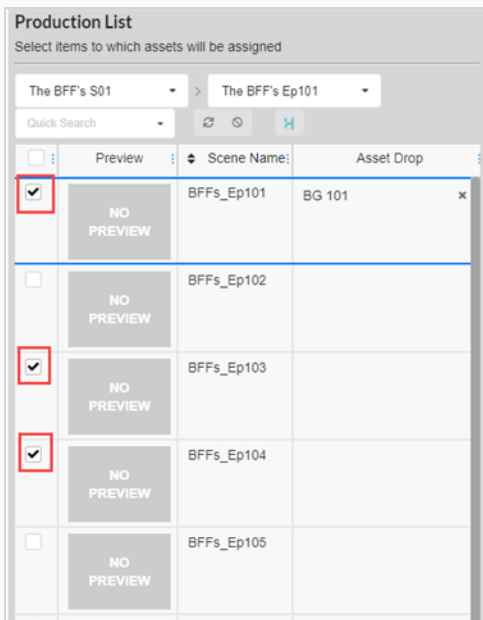
4. Locate the asset you want to associate to an environment, scene or job from the Assets List.

5. Select the asset by enabling the checkbox on the far left column of each asset you want to associate to an item.
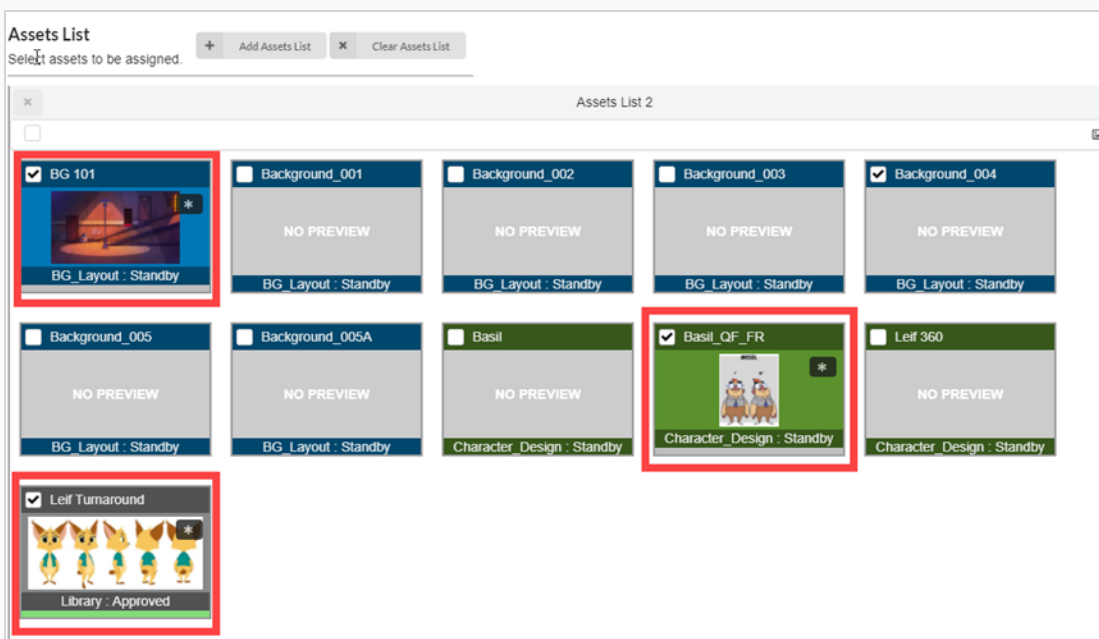
6. Click the **Move** button to associate the assets to the items.
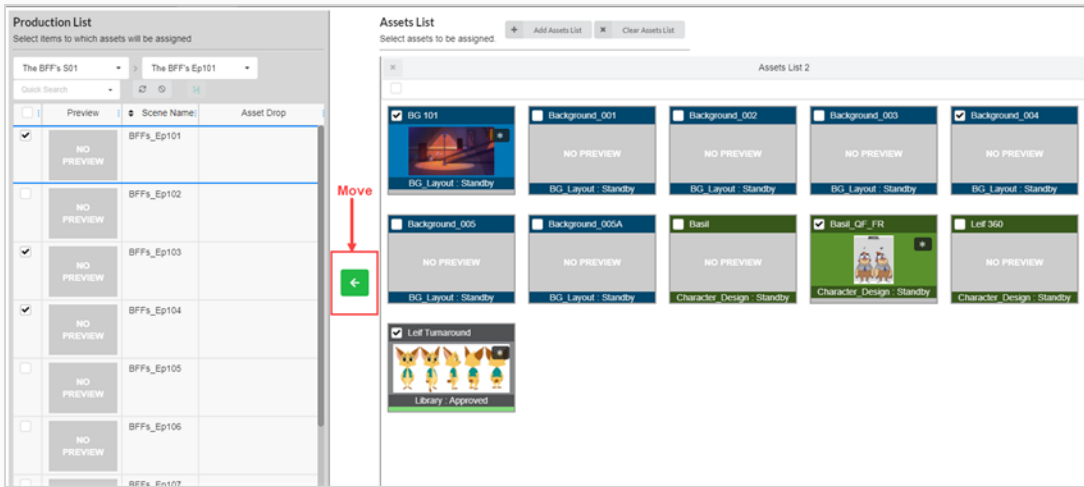
The assets are now listed in the Asset Drop column.
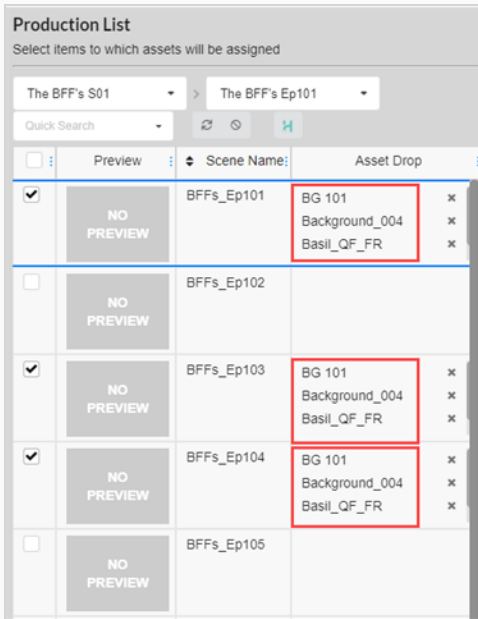
Disassembling

Assets that have been associated with environments, jobs and scenes can be disassociated at any time by disassembling them.

How to disassemble assets

1. In the top menu, select **Assets > Assembly**.

   The Asset list opens.

2. In the Assets list, locate the environment, scene or job you want to disassemble.

3. In the Asset Drop column, click the Remove ✖ icon on the asset you want to disassemble.

   The asset is removed from the Asset Drop column.

Checking the Asset Progress in a Scene Workflow

From a scene workflow, you can check the asset creation progress by adding a Progress process. This node will track the percentage of completion of the assets assigned to the scene.

How to add a Progress node to a workflow

1. In the top menu, select **Settings**.
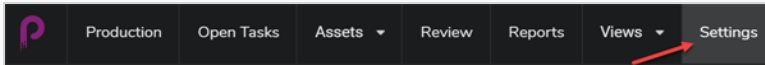
   The Project Settings are displayed.

2. Select **Workflows**.
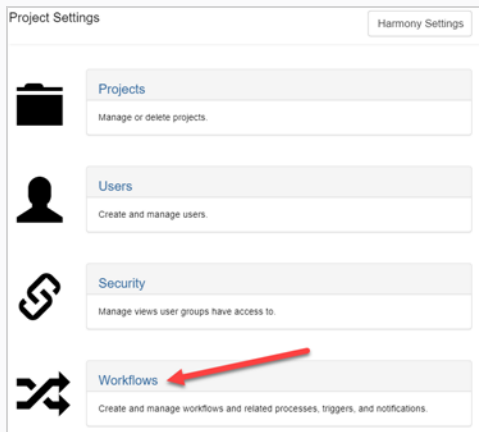
   The Workflow tab opens.

3. In the Workflow list, select the desired workflow you would like to add the Progress node to.

   The workflow appears in the editor.
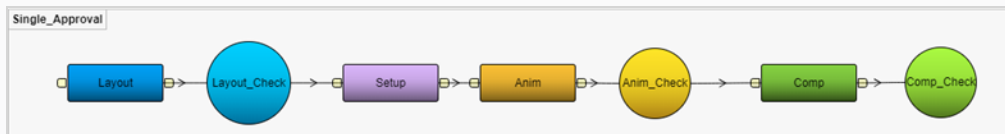
4. Click on the drop-down arrow **BESIDE** the Add Process button.

5. Select **Add Progress**.
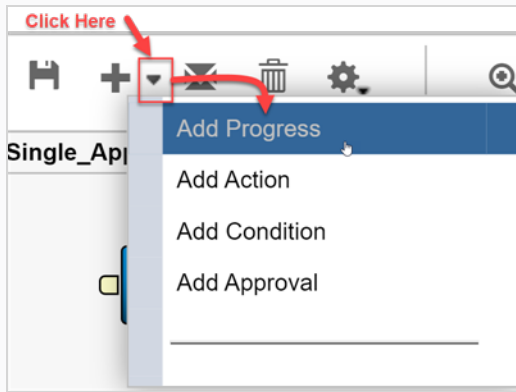
The new node is added to the workspace.

> **NOTE**
>
> Producer reads everything linearly, so the new node must be placed to the left of the Workflow.
>
>
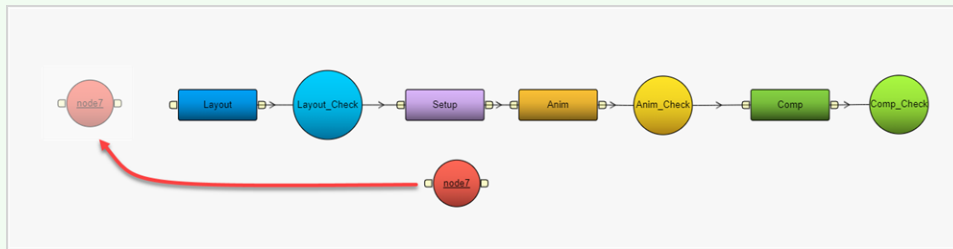
6. Rename your node to reflect the purpose, In this case, `Asset Check`.

7.
> **NOTE**
>
> To rename any node, either right-click and select **Rename** or press Ctrl/Cmd Click on the node.

8. Select the Asset Check progress node.

9. In the Properties view's Listen to events from field, select the Asset or any type of element you would like this to track in your workflow. You can track multiple items.
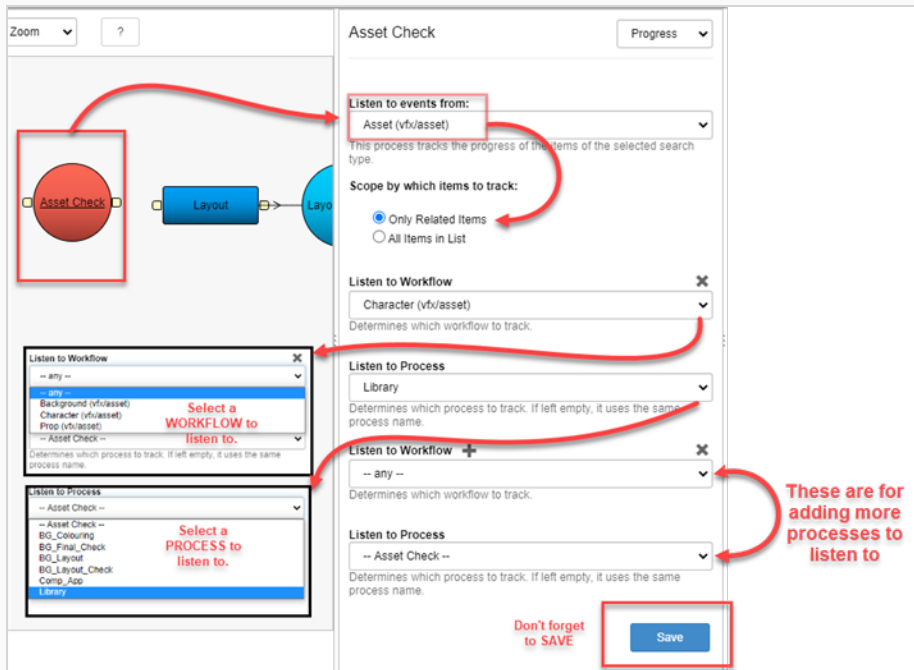
10. To save the changes to the process, click the Save button.

    Save

11. To save the Workflow, click the Save Workflow 💾 button.

Chapter 9: About Harmony Synchronization

You can import and synchronize scenes between Producer and Harmony as long as the Environment and Job structure is the same.

How to create environments in Producer and Harmony Server

To create a new environment in Producer and add it to the Harmony server you must follow these steps:

1. In the main menu, select **Production.**

2. In the Environments drop-down menu, select **All Environments**.

3. In the Production tab toolbar, click on the **Add Environment** button.
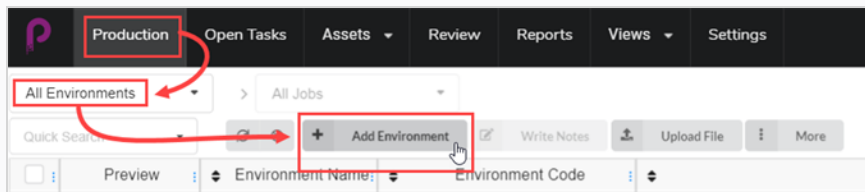
   The Create Environment window opens.

4. In the Name field, type in the name of the new environment.

5. In the Description field, optionally add a description of the new environment.

6. Check the Create in Harmony checkbox.

7. Click in the Environment field. The environment name is automatically regenerated. If there are spaces in the name, they will automatically be replaced by underscores. Harmony doesn't allow spaces in names.

8. In the Version of Harmony field, you can optionally enter the version of Harmony being used.

9. In the Add a default thumbnail box, you can optionally drag and drop a file that will be used at the environment's Preview image. This can also be done at a later time.

10. Click on the **Create Environment** button.

    The new environment will be sent to the render queue.

11. Go back to the **Production > All Environments**.
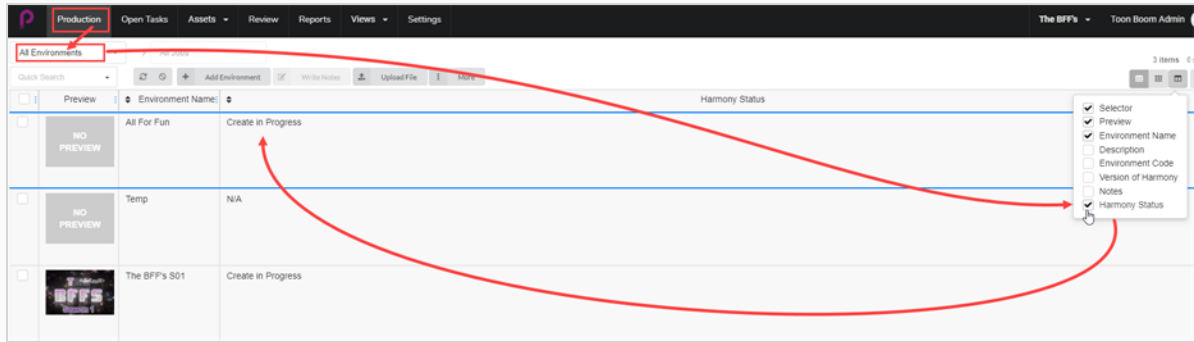
12. Go to the Column Selector 🔲 and check the Harmony Status box.

    The Harmony Status indicates Create in Progress.

13. Hit the **Refresh** button.

    The Harmony Status is updated to Vaild. The new environment now appears in the Harmony Server or will remain in the queue until there is a proper connection to the Harmony Server.
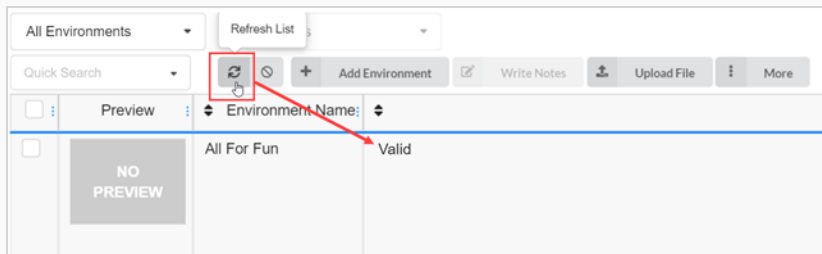
How to add jobs from Producer into Harmony Server

1. In the main menu, select **Production.**

2. From the Environment drop-down menu, select the environment in which you'd like to add the jobs.

3. In the Production tab toolbar, click on the **Add Jobs** button.
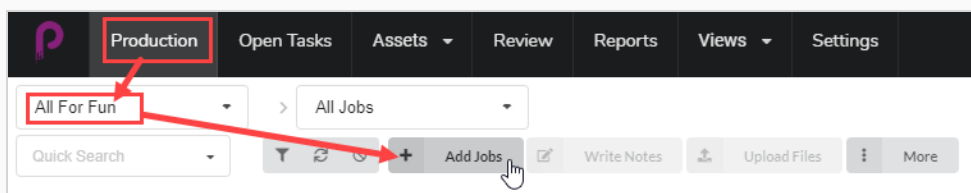
The Create Job window opens.

4. In the Number of jobs field, enter the number of jobs you wish to create.

5. In the Start Date field, click on the calendar icon to select a start date for the first job.

6. If you entered a value greater than one for the Number of jobs, in the Days between jobs field, enter the number of days you would like in the production schedule between jobs. This will affect the production schedule Gantt chart.

7. In the Name field, type in the name of the first job.

> **NOTE**
>
> If you create more than one job, it is important to add a number to the end of the name, as the other jobs will use the same name plus subsequent number.

8. In the Description field, optionally enter a description of the job.

9. In the Job Workflow and Scene Workflow drop-down menus, find the job and scene workflows that you would like to associate with the new jobs.

10. Check the Create in Harmony checkbox.

11. Click in the Job field. The job name is automatically generated from the one entered into the Name field. Spaces will be replaced by underscores.

12. Optionally, in the Version of Harmony field, enter the version number of Harmony being used.

13. Click **Create Job**.

    The new Job is sent to the render queue.

14. Go back to the Production page, selected environment, then to All Jobs.

15. Go to the Column Selector ⊞ and check the Harmony Status box.

   The status indicates Create in Progress. All the jobs have a sequential numerical order.
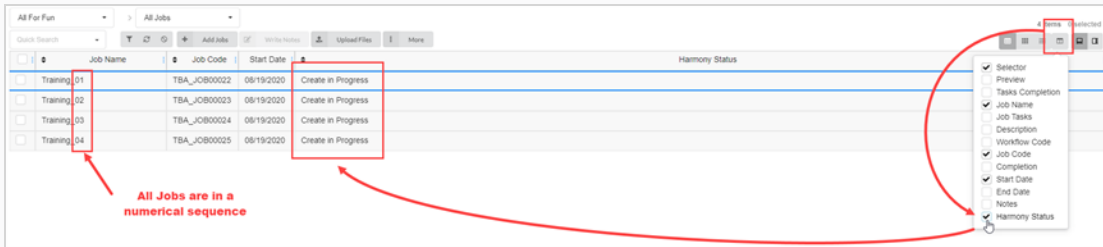
16. Hit the **Refresh** button.

    The Harmony Status is updated to Valid. The jobs appear in the Harmony Server or will remain in the queue until there is a proper connection to the Harmony Server.

How to add Scenes from Producer into Harmony Server

1. In the main menu, select **Production.**

2. From the Environment drop-down menu, select the environment in which you'd like to add the jobs.

3. From the Job drop-down menu, select the job in which you'd like to add the scenes.

4. In the Production tab toolbar, click on the **Add Scenes** button.
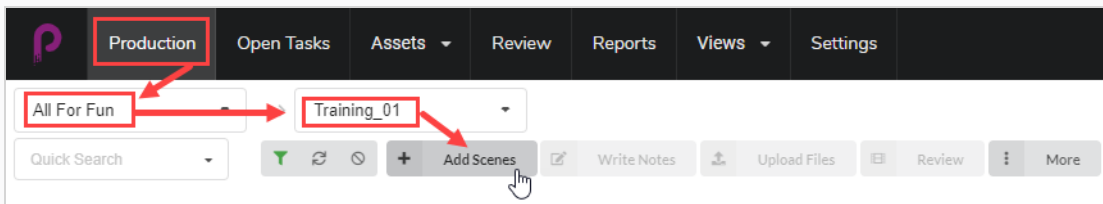
    The Create Scene window opens.

5. In the Number of scenes field, enter the number of scenes you wish to create.

6. In the Name field, type in the name of the first scene.

> **NOTE**
>
> If you create more than one scene, it is important to add a number to the end of

> the name, as the other scenes will use the same name plus subsequent number.

7. In the Workflow drop-down menu, select the workflow you would like to associate with the new scenes.

8. In the Number of frames field, enter a numerical value for the number of frames that you would like automatically created for each scene.

9. In the Priority drop-down menu, select the priority (No priority, 1 - Critical to 5 - Low) for the new scenes.

10. Check the Create in Harmony Server checkbox.

11. Click in the Scene field. The scene name is automatically generated from the one entered into the Name field. Spaces will be replaced by underscores.

12. Optionally, in the Version of Harmony field, enter the version number of Harmony being used.

13. Optionally, in the Description field, enter a description of the scene.


14. Click **Create Scene**.

The new Scene is sent to the render queue.

15. Go back to the Production page, selected environment and job.

16. If the Harmony Status column is not displayed, go to the Column Selector ⊞ and check the Harmony Status box.

    The status indicates Create in Progress. All the scene names have a sequential numerical order.

17. Hit the **Refresh** button.

    The Harmony Status is updated to Valid. The scenes appear in the Harmony Server or will remain in the queue until there is a proper connection to the Harmony Server.

How to create scenes/jobs in Harmony and synchronize with Producer

> **NOTE**
>
> Environment and job names must match in both Harmony and Producer for this process to work.

1. In your Harmony Server, create your scenes.
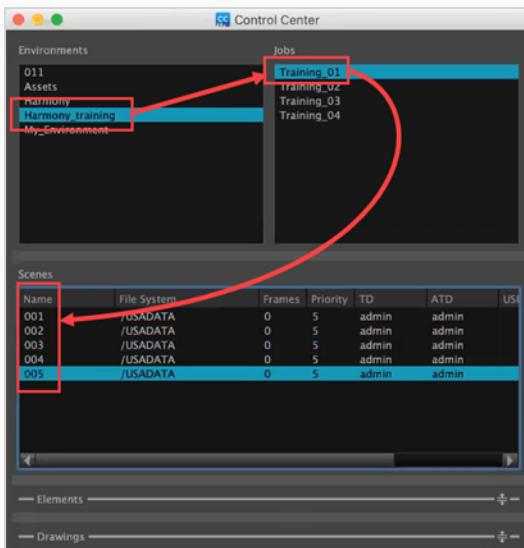
2. Once the scenes are created in Harmony, go back to Producer and in the main menu, select **Production**.

3. In the Environment and Job drop-down menus, select the environment and job you would like to populate with scenes created in Harmony.
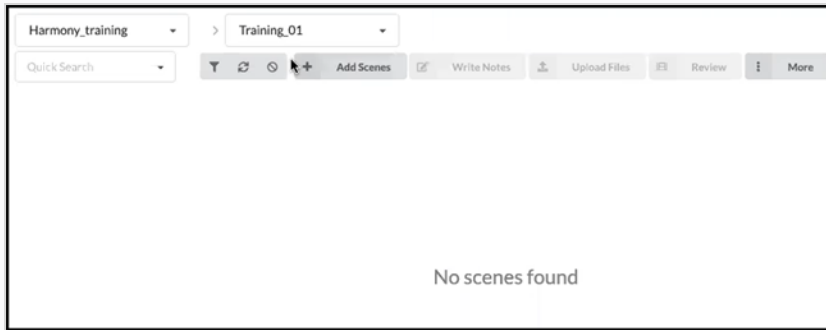
No scenes will be visible yet.

4. In the Jobs drop-down menu, select **All Jobs.**

5. From the list of jobs that appear, select the jobs for which created scenes in Harmony by checking their checkboxes.
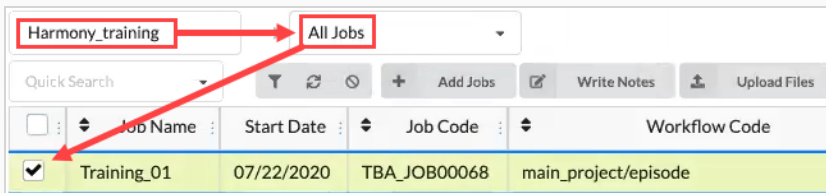
6. In the Production tab toolbar, select **More > Synchronize with Harmony**.
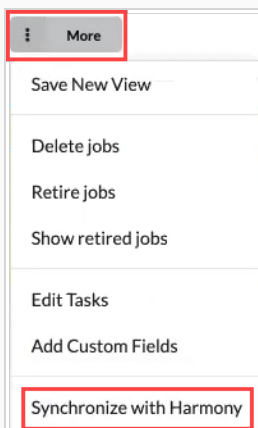
The Synchronize with Harmony dialog box opens.
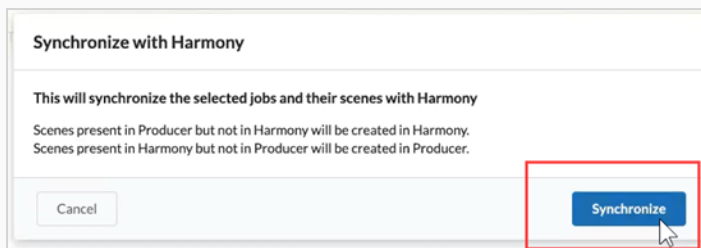
7. Click on the **Synchronize** button.

The scenes appear in Producer.

> **NOTE**
>
> Syncing with Harmony will also update the frame counts to those set in Harmony.

How to sync Harmony with scenes deleted in Producer

1. In your Environment/Jobs where you would like to delete a scene(s), check the box on the left column. Then go to the More tab and select Delete Scenes.
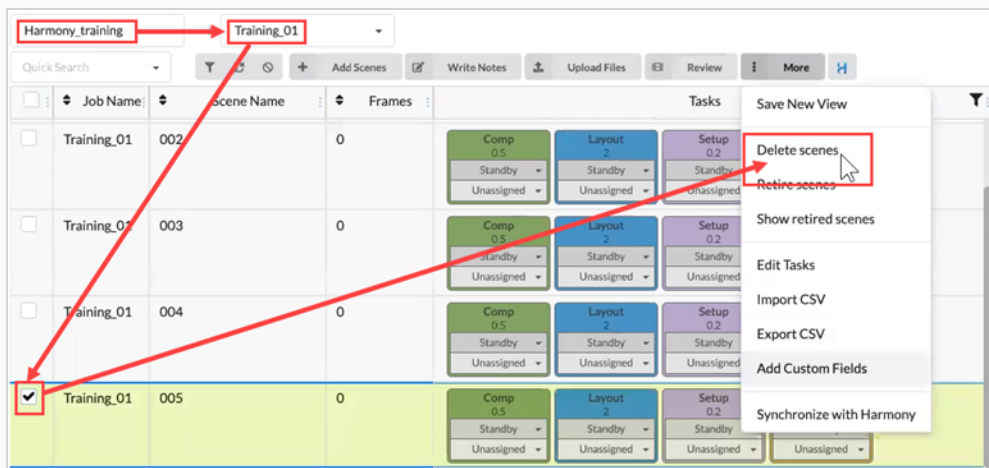
The Delete scenes dialog box opens.

2. Select **Delete**.

   The Delete scenes WARNING window opens. It tells you that the Producer scene and the external scene in Harmony will be deleted.
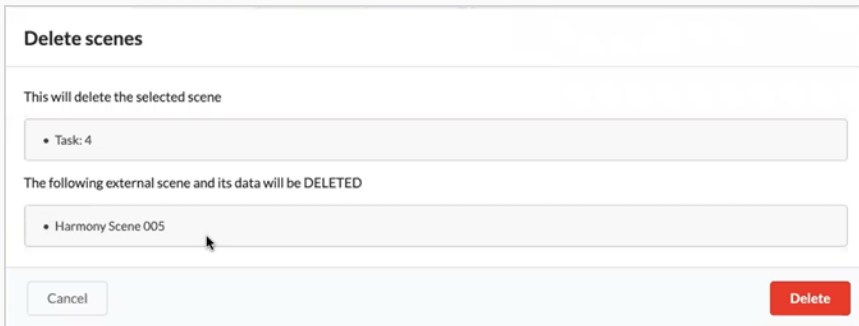
3. Select **Delete.**

   The selected scenes are deleted from both Harmony and Producer.

Updating Snapshot Scripts in Harmony

In Harmony you must install the snapshots scripts provided by Toon Boom. There will be two types of scripts to install. One is the Scene Snapshot scripts, they other is the Asset Snapshot scripts. The scripts allow Harmony to be connected to Producer.

How to upload a scene snapshot from your scene:

1. Select the Scene Snapshot script within the scene you wish to upload a snapshot.

   The TB_Producer_SceneSnapshot window opens.

2. Enter in the information for this scene. The first 4 fields are mapped to the Project > Environment > Job > Scene.
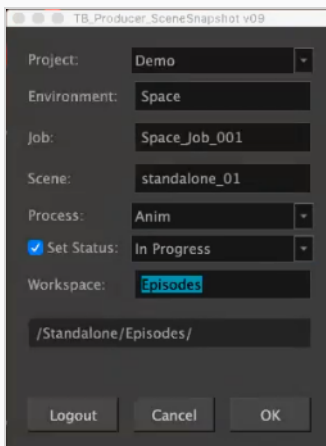
3. In the Process drop-down menu, select the process.

4. Set the process/task status that you wish to be updated in Producer.

5. Click **OK**.

   The Create Preview progress bar appears.
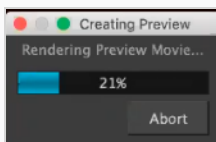
   Once finished, the Preview Confirmation window opens.

6. Click **Upload** to send the snapshot (preview) to Producer.
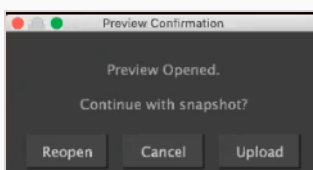
Harmony lets you know that your preview has been successfully created.
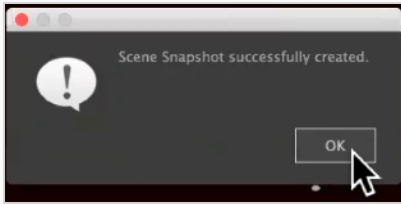
About Sending Assets to Harmony (Baking)

In Producer, "baking' refers to the pushing of assets directly into Harmony scenes. This can be simply accomplished in the Asset Assembly page, by selecting the scenes for which you wish the baking to be done and pressing the baking button (with the Harmony logo). However, several operations have to be completed first to insure a successful bake.

Requirements for Baking

Producer_Link	Producer Link is an application that can help you create workspaces and upload assets to Producer. It can be downloaded from the about page of Producer.
cli_workspaces	Setup through Producer link, the file /Users/user_name/.producer/cli_workspaces has to reflect the local access path to folders storing assets.
workspaces.json	Setup manually, the file /USA_DB/workspaces.json specify which folders can be used to store templates and must also specify the folders containing assets (the same as specified in cli_ workspaces) so that Harmony can find these assets and paste them to the scenes.
TB_Producer_ AssetSnapshot.js	That Harmony script allows the user to push an asset from a Harmony scenes as a preview in Producer and as a template, in a library folder (specified in workspaces.json). That script can be downloaded from the About page of Producer. (Note that all 4 scripts should be installed as they are referring each others)
WebCC	WebCC is a Harmony application that is able to communicate with Producer. For the baking to work, you have to use WebCC version 17.0.3 or more higher.

Sending a PSD file into a Harmony scene

You can send a PSD file directly to Harmony using Producer.

How to send a PSD file to Harmony

1. In top menu bar, go to **Asset > Manage**.

2. In the secondary toolbar, click on the **Create Asset** button.

   The Create Asset dialog box opens.

3. In the Create Asset dialog box, specify the name of the asset (in this case the name of he PSD file).

4. Check the **Harmony Standalone** option box.

5. In the Workspace ID field, specify the workspace ID—see About Sending Assets to Harmony (Baking).

6. In the Relative Path field, enter the end of the path extenxsion. The relative path relates to where the asset is located within the workspace.

7. In the Workflow drop-down menu, specify the workflow by choosing one from the list.
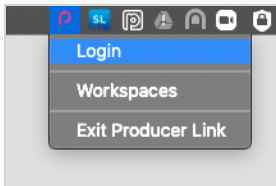
8. Click on the **Add Asset** button.

   The PSD file is now available in Harmony.

How to create a snapshot and add a preview image of the PSD

1. From your desktop top menu bar, click on the Producer icon and select **Login.**

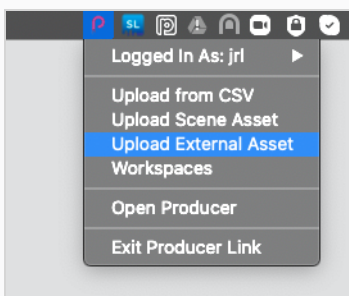   The Login to Producer dialog box appears.

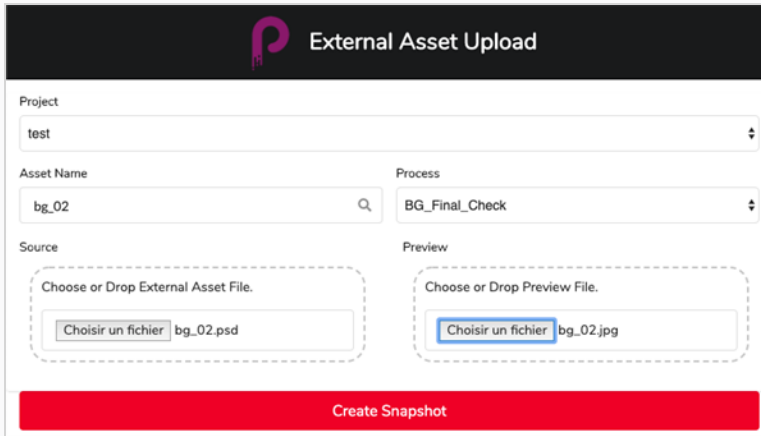2. Enter the web address of your Producer, as well as your username and password.
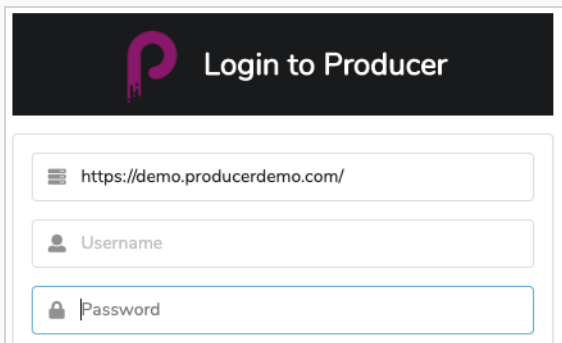
3. From your desktop top menu bar, click on the Producer icon and select **Upload External Asset**.


   The External Asset Upload dialog box opens.

4. In the Project drop-down menu, select the project where your asset is located.

5. In the Asset Name field, click on the magnifying glass icon to search for the asset and identify it.

6. In the Process drop-down menu, select a workflow task to specify which task/process the snapshot is being uploaded for.

7. In the Source section, click on the the **Select File** button to browse and locate your asset file.

8. In the Preview section, click on the **Select File** button to upload a preview file, if one is available.

9. Click on the **Create Snapshot** button to upload the preview and inform Producer of the location of the actual asset.

How to bake the PSD into a Harmony

1. Complete the asset assembly (associating assets from the asset list to the scenes in the Production List)—see Assembling.

2. In the Production list, select one or multiple scenes to bake.
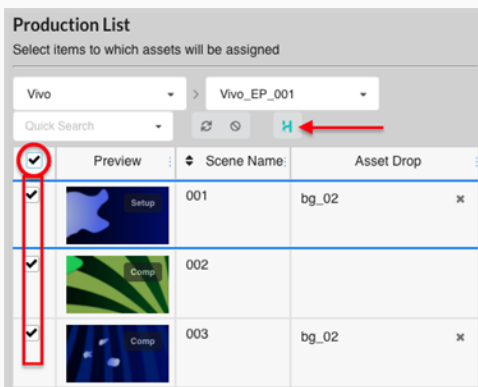
3. Press the **Bake** button (the one with the Harmony logo).

   The Bake Assets in Harmony dialog box appears.

Bake Assets in Harmony

Copy assets to their associated scenes's local library only

• [ASSET00008] bg_02

Cancel   Bake >

4. Click on the drop-down menu to select how you want the asset to be baked.

   - Copy assets to their associated scene's local library only

     Default option. This option makes the asset available within the scene without adding it to the timeline and Node view.

   - Always paste assets into the scene itself

     This option puts a copy of the asset in the local library of the scene and will add the asset directly to the timeline and the Node view. To protect the work that was done and to avoid confusion, this option creates a new version of the scene that will be called "producer paste" and this version will become the current version.

5. Click on the **Bake** button.

   The PSD is baked into the selected Harmony scenes.

Baking a Scene Template into a Harmony

You can create a template file of a scene for Harmony using Producer.

How to bake a template file into a Harmony scene

1. Create a Harmony scene asset—see Uploading an Asset.

   This creates a new asset in Producer and a new scene in Harmony that will be used to build this asset.

2. In Harmony, make sure your Harmony snapshot scripts are installed and launch the **TB_Producer_AssetSnapshot** script by clicking on its icon.
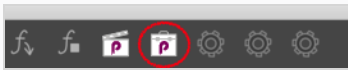
   The TB_Producer_AssetSnapshot dialog box appears and you may be prompted to login to Producer if you are not already.

3. Complete the login to Producer if necessary.

4. In the TB_Producer_AssetSnapshot dialog box, from the Project drop-down menu, select the project in which you would like to create the template file.
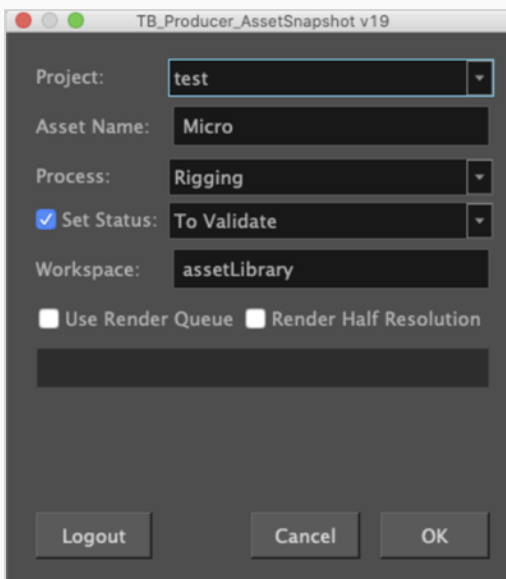
5. In the Asset Name field, type in the name of the asset.

6. In the Process drop-down, select the task/process for which you want to upload this preview of the template.

7. Click on the Set Status checkbox if you would like to set the status of the task/process. If you check this box, from the Set Status drop-down menu, select the status that you would like to update the status of the task/ process to.

8. In the Workspace field, type in the name of the workspace. In this case, the workspace name refers to a reference folder where a .tpl of the current scene will be generated and stored. The workspace is defined in **`/USA_DB/workspace.json`**.

   If no Workspace is specified, the template will be placed in **`/USA_DB/library/assets/env_name/job_name/asset_name.`**

1. Click **OK**.

   A template of the whole scene is generated in Harmony AND preview of the asset is pushed to Producer.

Chapter 10: About Reviewing

Reviewing is the process of watching, reviewing, approving, and providing retakes to preview movies for scenes submitted by project collaborators after they have completed a task.

Project collaborators are able upload movie previews of the scenes they have worked on in Producer. By loading these movie previews into Producer's review tool, directors, supervisors, and other project administrators are able to do the following:

- Stitch the movie previews of several consecutive scenes into a sequence.

- Play these movie previews

- Stop at, or seek specific frames to examine them

- Add notes to the scene

- Draw annotations over frames in the scene, and add them as attachments to a note

- Approve a scene's task

- Send a scene's task for revisions (retakes)

To use the Review tool, you must create a review session. A session is essentially a container in which you can store a sequence of scenes. Opening the session will load the scenes into the Review tool and allow you to review and annotate them.

There are two types of session:

- **Temporary**: A review session that is created on the go as you send scenes to the review tool from the Production page. Each user can only have one temporary review session. If you already have a temporary review session, creating a new one will overwrite the old one.

- **Permanent**: A review session that is created in the Review tool before sending scenes to it from the Production page. These sessions typically have a specific purpose, such as reviewing the same segment of an episode as its completion progresses. You can create as many permanent review sessions as needed.

> **NOTE**
>
> Reviewing allows you to preview one or several scenes together and is typically used to approve the work of project collaborators on tasks or to send them for revisions. If you only wish to watch the preview movie for a single scene without actually reviewing it, you can play the preview movies for scenes from within the Production page.

Creating a Temporary Review Session

Temporary review sessions can be created directly from the Production page. Each user can have only one temporary review session at a time, and creating a new one will overwrite the previous one.

How to create a temporary session

1. Open the job in which you want to review one or more scenes.

   The Scene list opens.

2. In the far-left column, enable the checkbox for each scene that you want to review.

   > **NOTE**
   >
   > You can only review scenes that have a playable movie preview. Scenes with a movie preview will have a thumbnail and a Play button underneath their thumbnail.
   >
   >

3. In the toolbar above the scene list, select **Review**.
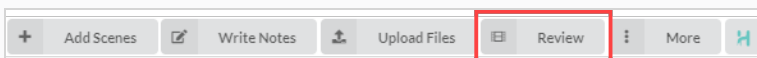

   The Review dialog box opens.

4. In the Select Review Process drop-down menu, select the process (task) that you wish to review. This list will change according to the type of workflow that was created.

5. Select the **Use Temporary Review Session** option.

6. Click Review Now.

   A notification will appear in the bottom-right corner of the interface indicating that the session is ready.
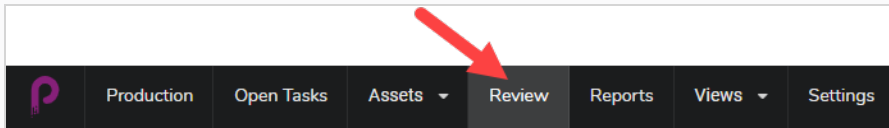
7. Click on Open Review.
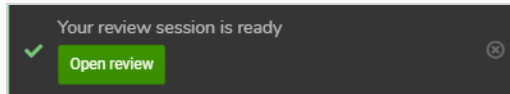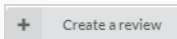
Creating a Permanent Review Session

You can create a review session from the Review page, then populate it with scenes from the Production page. You can create as many permanent review sessions as needed.

How to create a session

1. In the top menu, select **Review**.

2. In the toolbar at the top of the Review page, select **Create a Review**.

The Create a Review dialog box opens.

3. In the Name field, name the review session.

4. In the Date field, select the pop-up calendar and the date at which you want the review session to take place.

5. In Assignee field, you can assign the review to a particular user.

6. In the Restriction field, select the type of restriction needed to limits the elements that can be added to this review.
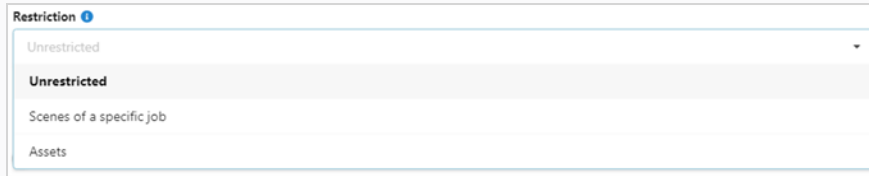
There are three options:

- **Unrestricted**: Anything can be added to the session.
- **Scenes of a Specific Job**: It can be limited to scenes of a specific job which opens more options (Job and Process).
- **Assets**: It can be limited to assets which opens one additional option (Process).

7. To allow external review, enable the **External Review** option. This is added as flag as there is no limitations while using it. It is useful for a client to easily search for reviews meant for them externally.

8. Click **Add**.

The session has now been created.

> **NOTE**
>
> Once your session is created, you must add scenes to it.

Sending Scenes for Review

Once you have created a session, you can add scenes to be reviewed in it from the Production page. You can add scenes to new, empty sessions, or to sessions that already have scenes in them.

How to add scenes to a session

1. Open the job in which you want to review one or more scenes.

   The Scene list opens.

2. Enable the checkboxes on the far left column of the scenes you wish to review.

3. In the toolbar above the scene list, click **Review**.

   The Review dialogue box opens.

4. In the Select Review Process drop-down menu, select the process (task) that you want to review. For example, if you want to review the work of a project collaborator on a scene's animation, select the process for Animation.

5. Select the **Use Review Session** option.

6. In the Use Review Session drop-down menu, select the review session to which you want to add the selected scenes.

7. Click **Submit**.

   A notification appears in the bottom-right corner of the page indicating that the session is being updated. When the notification disappears, the session is ready for review.

Filtering a Review Session

If you have a lot of review sessions and you need to find a specific one, you can filter the sessions in the list using keywords from their descriptions. You can also choose to only view sessions of a certain type, or sessions within a specific range of dates.

How to filter sessions

1. In the top menu, click **Review**.
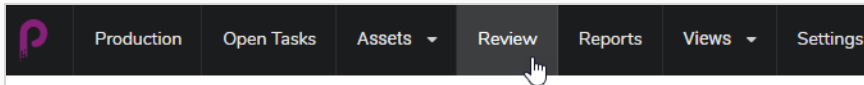
2. In the Review page, click the Toggle Search Panel ▼ button at the top right of the page.
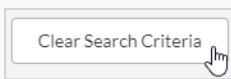
   The Search Criteria panel opens.

3. Select one or many of the search criteria listed. The reviews will automatically populate at the bottom as you enter your criteria.

4. To remove all of your search filters, click **Clear Search Criteria** at the bottom of the search panel.
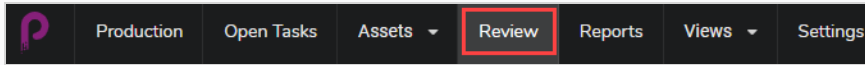

   All of the sessions are be displayed in the session list.
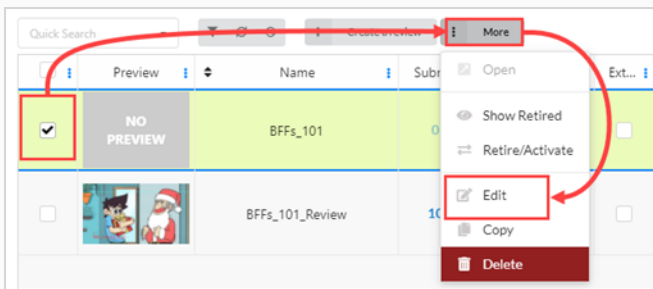
Editing a Review Session

Once a session is created, you can edit its name, assignee, restriction, date and if the review is external.

How to edit a review session

1. In the top menu, click **Review**.

2. In the Review page, check the box on the far left for the review you wish to edit.

3. Select **More > Edit**.

The Edit Review window opens. You can change the name of the review, set or change an assignee, create a restriction, set a date as well as label External/Locked/Closed reviews.

> **NOTE**
>
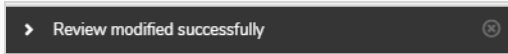> The External Review is a simple flag and is only used to help with search results.

4. Click the **Edit** button at the bottom to save your changes.

   A notification appears in the center of the page indicating that the changes are saved.

   > Review modified successfully

Opening a Review Session

Once a session has been created and filled with scenes, you can open it and play the preview movies for each scene in the session in a single video player. From the Review interface, you can add notes to scenes, draw annotations, approve scenes or send them for revision.

You can open multiple review sessions at once. Each session you open will appear in the Open reviews panel at the far left of the page.

How to open and play a review session

1. In the top menu, click **Review**.

2. In the Review page, select a review session to open.
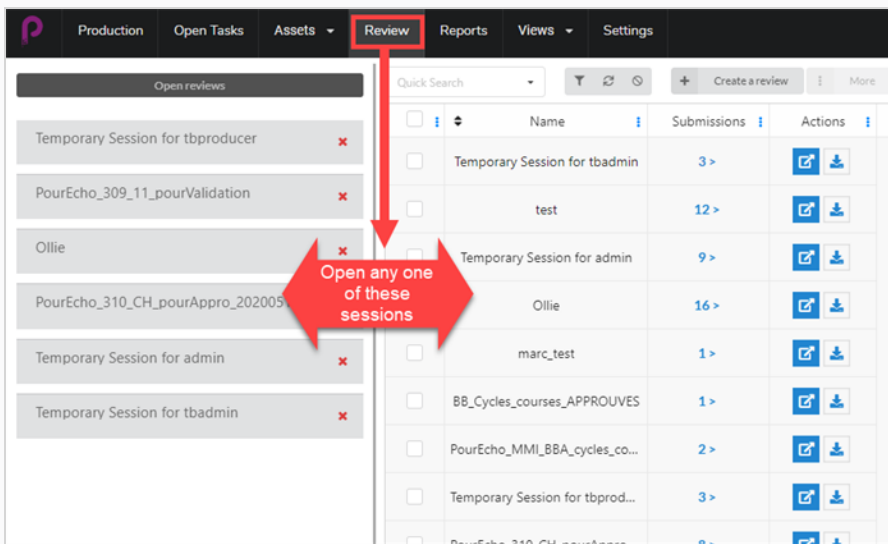
Once in a review session, a list of one or more reviews opens in the far left column. From here you can return to the All Reviews page.
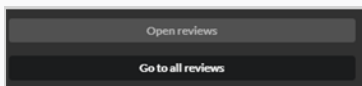
> **NOTE**
>
> If the column is not visible, click on the Reviews tab in the window to the right.

3. Click on the video player to the right to start playing the movie. The movie will include all the scenes in the review session, stitched together in a single sequence.

> **NOTE**
>
> Movies can only be stitched together if their options/parameters all match (see Delivery section below).

4. While reviewing scenes, you can do the following:

   - To pause, resume, mute or adjust the volume of the video, or to skip to a specific part of the video, use the controls inside the video player. Space bar will also work to pause or resume your video.

   - If you want to instantly skip to the beginning of a specific scene, select that scene in the Scenes panel to the left.

   - To skip to the previous scene, click Show Previous Scene or press the Up key.

   - To skip to the next scene, click Show Next Scene or press the Down key.

   - To go to a specific frame, pause the movie near the frame you want to see, then click Show Previous Frame or press the Left key to go back one frame, or click Show Next Frame or press the Right key to go forward one frame.

   - To hide or display the controls in the video player, click Video controls.

   - Click Maximize to hide the Scenes and the Notes panel and expand the video player.

   - To enable or disable looping, click the Looping button. When looping is enabled, the player will play the first scene from the beginning after reaching the end of the last scene.

# Returning to the Session List and Switching Sessions

Once you have already opened a session, you can return to the session list using a number of ways.

How to return to the session list

1. Do one of the following:

    -   From any page, in the top menu, click **Review**.

    -   From the Review Session page, select any open review or any review that was created
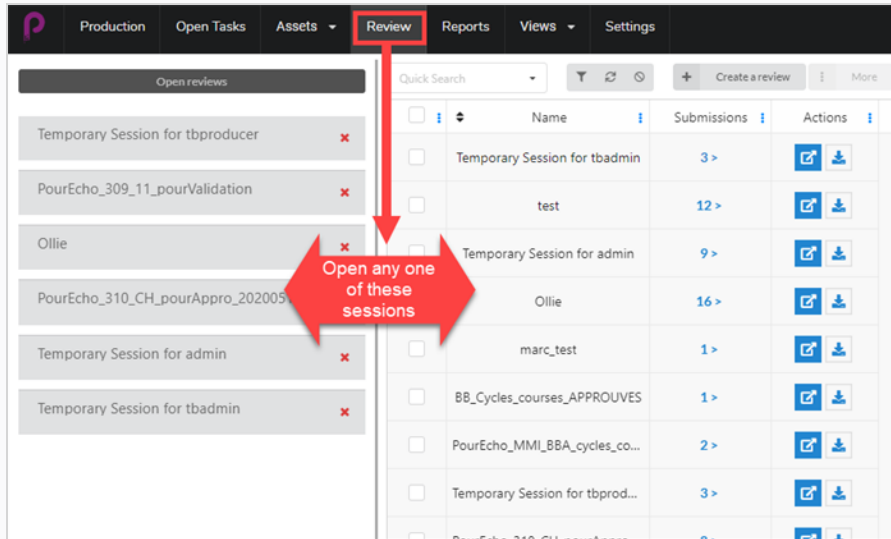
    -   Once in a review session, you can easily switch from one open review to another. On the far left of the page there should be a list of Open Reviews.
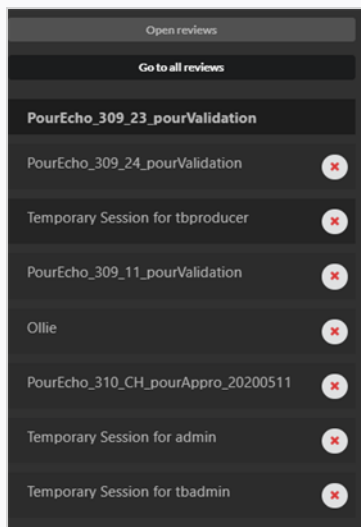
- If the list isn't visible, select the Reviews tab in the window to the right.

2. From here you can easily switch reviews by selecting the next open review in the column.

Removing Scenes from a Review Session

If you accidentally added extra scenes to a review session, you have the ability to remove them.

**How to remove scenes from a review session**

1. Make sure you are in the review session list to edit.

2. Select **Go To All Reviews**.

3. In the Column Selector on the far right, make sure that the Submission column is checked.

   Go to all reviews

   In the column, the number of Scenes/Snapshots that have been submitted appears.

4. Click on the Submission number.

   The Submission window opens.
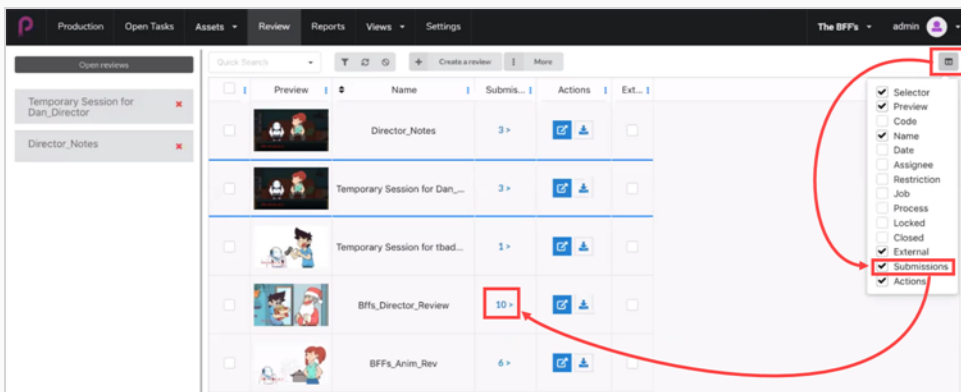
   In the Submission window, all the snapshots/scenes for the current review are displayed.

5. Select one or more you wish to delete and then click **Delete Submissions**.

NOTE

This will not delete the scene from Producer.

Deleting a Review Session

Deleting a session will permanently erase it and it will not be accessible again.

> **NOTE**
>
> Deleting a review session will not delete any of its scenes, nor will it delete any of the attachments or notes created within the session or undo any of the task status changes done within the session.
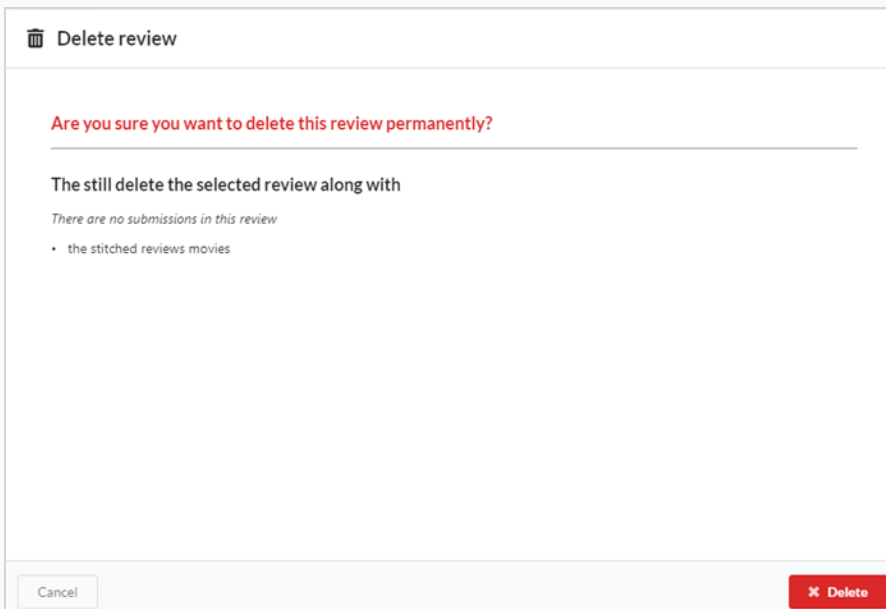
How to delete review sessions

1. In the top menu, click **Review**.

2. In the Review page, check the box on the far left for the review you wish to edit.
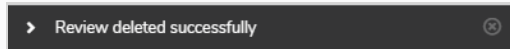
3. Select **More > Delete**.
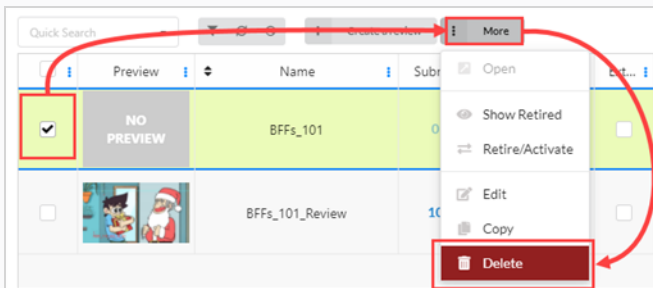
   A confirmation prompt opens.

4. In the confirmation prompt, click **Delete**.

A notification appears indicating that the item is being removed from the session.

Playing Preview Movies

You can view the preview movie for any environment, job, scene, or asset in the preview column for that item.

How to play a preview movie

1. Open the job containing the scene you want to preview.

2. Do one of the following:

   - To play the scene's preview movie within its thumbnail in the Production page, click on the Play ▶ button below its thumbnail.

   - To pause the movie within the thumbnail, click on the Stop ■ button.

   - To watch the preview for an item, click on the Play ▶ button, or click in the video player to play the movie.

   - Press the Stop button or the spacebar to start the movie from the beginning.

   - To open the preview movie for a scene in high resolution, click on the Expand ⛶ button below its thumbnail. The preview movie will open in a new tab.

Adding a Note to a Scene in a Session

Notes can be added to scenes in a session to make comments and suggestions, request corrections, point out details or otherwise communicate important information about a scene to project collaborators.
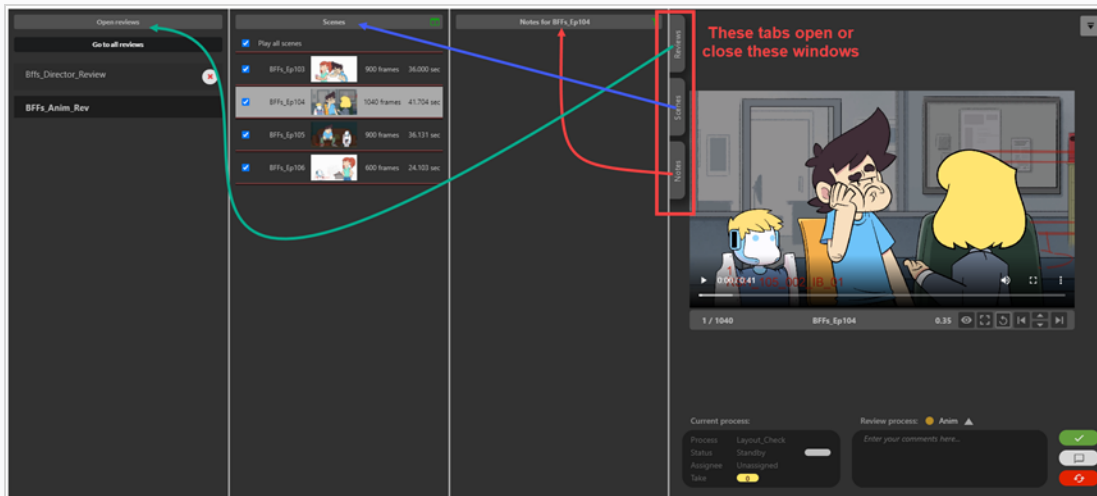
> **NOTE**
>
> - Scene notes can also be added and viewed in both the Production page and in the My Tasks page.
> - It is also possible to draw annotations over a frame in a scene and attach it to a note.

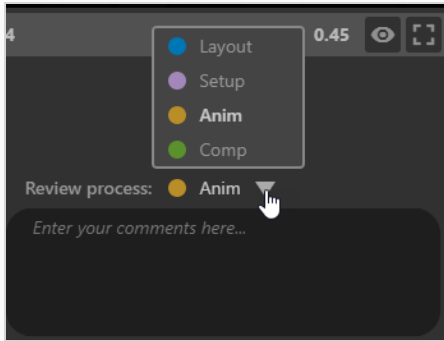### How to add notes to a scene in a review session

1. Open the review session containing the scene you wish to review. There can be 4 different columns open.
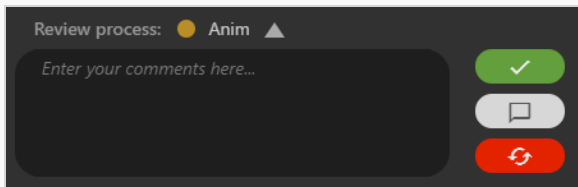

2. In the Scenes column, select the scene to which you want to add a note.
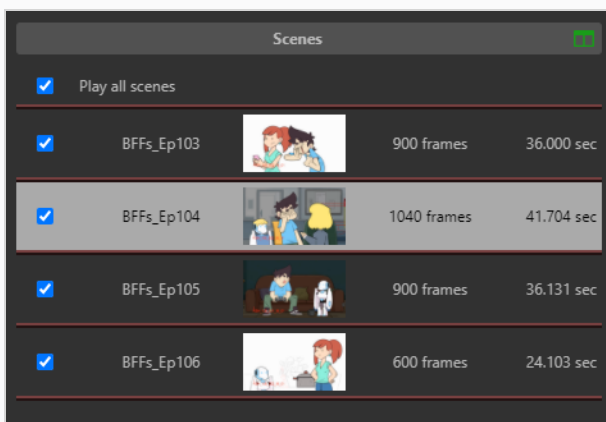
3. In the Review process drop-down below the preview area, select the process for which you want to add a note.

4. In the Enter your comments here text box, type in the content of your note.

There are 3 options:

- **Approve Scene**: Sets the scene review process to Approved in Producer

- **Save Note**: Saves the note and it appears in the left column under Notes.

- **Revise note**: Creates a note, sets the scene review process to Revise in Producer.
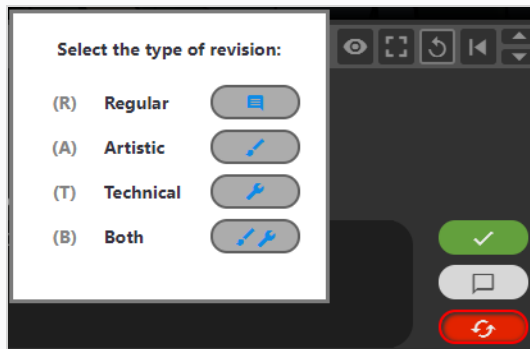
5. The note can then be categorized. Select Regular/Artistic/Technical/Both (artistic and technical).

   Your new note(s) is now visible in the Notes column.

Drawing Annotations While Reviewing Scenes

The Review tool allows you to freeze on a specific frame in the preview movie, draw annotations over it using a variety of drawing tools, then add this annotation to the scene, as a note.

An annotation is added to a scene as an attachment to a note. They can be viewed from the Review page as well as Production and My Task pages by opening the note attachment.

How to draw annotations

1. Open the review session containing the scene you wish to review.

2. In the Scenes column, select the scene to which you want to add a note.

3. Go to the exact frame to which you want to add an annotation by doing one or several of the following:

   - Play the video up until it is at the right frame, then pause it.

   - To fast forward to the frame you want to annotate, click and drag on the play head and release it when it is at the right frame.

   - To go back one frame, click the Show Previous Frame ◀ button under the video player or press the Left key.

   - To go forward one frame or click the Show Next Frame ▶ button under the video player or press the Right key.

   > **NOTE**
   >
   > For the keyboard shortcuts to work with the video player, you must click inside the Review tool, but outside of the video player.

4. In the top right, click the Display drawing toolbar ▼ button.

   The drawing toolbar appears.

5. You can use the following tools in the drawing toolbar to draw over the frame:

   - Use the Pen ✏ tool to draw on the frame.

   - Use the Arrow ↗ tool to draw arrows.

   - Use the Box ◻ tool to draw rectangles and boxes.

   - Use the Straight Line − tool to draw straight lines.

   - Use the Erase ✐ tool to erase any drawings..

   - Set the Set Drawing Colour 🎨 tool to change the colour of your drawing tool.

- Use the Undo Last Drawing ↶ tool to undo the last drawing stroke.

- Use the Redo Last Drawing ↷ tool to redo the last stroke you undid.

- Use the Clear All Strokes ✕ tool to clear all drawings

6. In the Review process drop-down below the preview area, ensure the process for which you want to add an annotation to is selected.

7. Do one of the following:

  - To only add your annotation to the scene without approving it or sending it for revision, click the Save Note ⬚ button.

  - To add the annotation to the scene and send it for revision, click the Revise Scene ⟳ button.

  - To add the annotation to the scene and approve it, click the Approve Scene ✓ button.

The note and its annotation will appear in the Notes column in the middle, near the top.
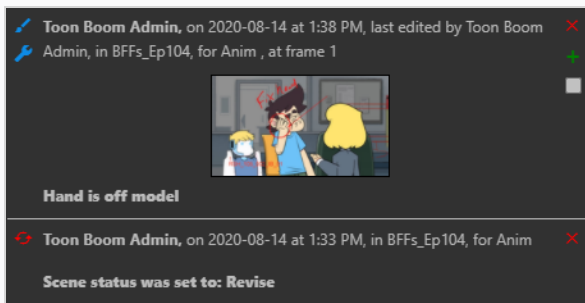
If you approved the scene or sent it for revisions, an extra note will appear in the Notes column indicating so. The icon next to the scene in the Scenes list will also change to represent its current status.
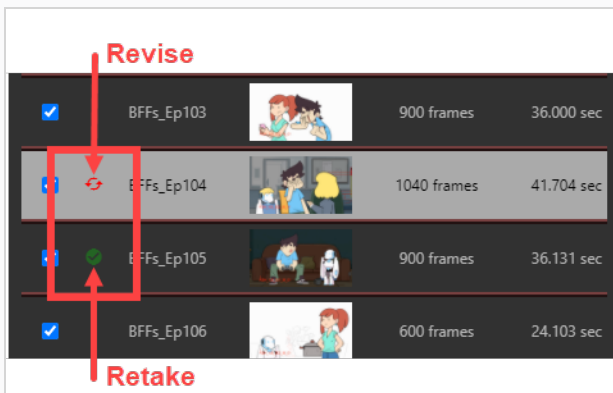
Sending a Scene in a Session for Revision

When reviewing a scene in a review session, you can send it back to the project collaborator who worked on it to request revisions. You can add a note to specify which revisions are requested, draw annotations over a specific frame in the scene to visually indicate what kind of revisions are needed, or both. You can also indicate whether the requested revisions are technical or artistic.

> **NOTE**
>
> NOTE: Adding a note or an annotation is required to send a scene for revisions.

How to send a scene for revisions with a text note

1. Open the review session containing the scene you wish to review.

2. In the Scenes column, select the scene that you want to send back for revisions.

3. In the Enter your comments here text box, type in the content of your note.

   > **NOTE**
   >
   > You must include a note or annotation drawing when sending sessions for revision.

4. Click Revise scene to send the scene for revisions.

5. In the Select the type of revision dialog, choose whether the note is Regular, Artistic, Technical, or Both.

   The status of the scene's current process is set to Retake. The note appears in the Notes column. In the Scenes column, two curved red arrows appear on the left of the scene.

Approving a Scene in a Session

Once a scene has been reviewed and any notes have been implemented, it can be approved.

How to approve scenes

1. Open the review session containing the scene you wish to review.

2. In the Scenes column, select the scene that you want to approve.

3. If you want to add a note while approving the scene, type in the content of your note in the Enter your comments here text box.

4. Click Approve Scene to approve the scene.

   The approval note appears in the Notes column. In the Scenes column, a green checkmark appears on the left of the scene.

Viewing Notes in a Review Session

In the Review page, you can choose whether to view all notes for the items in a session at once, or to only see the notes for the scene currently highlighted in the Scenes list. Notes are listed from newest to oldest.

How to view notes for all the scenes in a review session

1. View the session whose notes you wish to view

2. Do one of the following:

    - In the Notes column, click the Filter button. In the drop-down menu, click For all scenes.
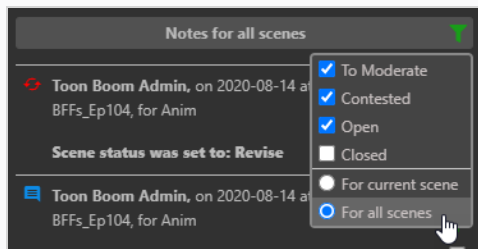
    - Click the title of the Notes list.

    Only notes for all session items will be visible.

How to view only notes for the current scene in a review session

1. To return to only viewing notes for one item at a time, do one of the following:

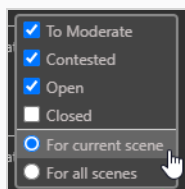   - In the Notes column, click the Filter button. In the drop-down menu, click For current scene.

    - Click the title of the Notes list.

   Only the notes for the current item will be visible again.

Moderating Notes

For this to work, a user must be tagged as a Moderator and another as a Moderated Person by the administrator. As a Moderated Person, their notes will not reach the general public in the production immediately. They will have to go through a Moderator(s) in order for their notes to get to the rest of the production. This is a safeguard for all involved.

Once the Moderators and the Moderated are in place, notes from the moderated will have to be screened by the moderators of the production.

How to moderate directors notes

1. To add a user as a Moderator or Moderated Person, in the main menu, select **Settings**.

2. In the Settings tab, select **Security**.
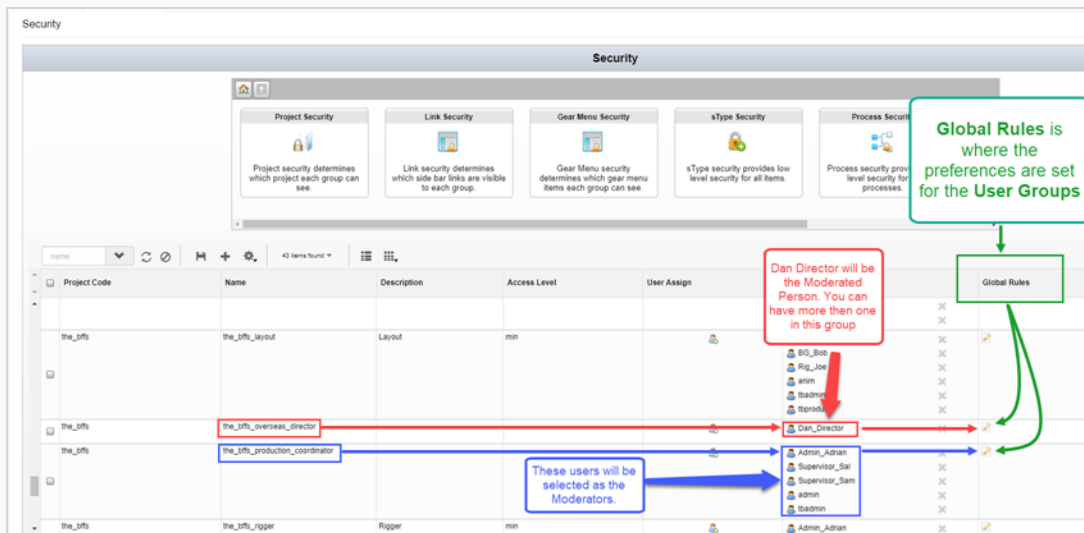
3. Find the group in the production you wish to be the Moderator or the Moderated.

4. If you need to add or subtract names from those groups, in the User Assign tab, select the User 👥 icon .

   The Assign Users to Group dialog box opens.

5. Use the check box to add or remove users from the associated group, the click **Save**.

6. In the Global Rules column, select the Edit 🖉 icon.

   The Permissions Manager dialog box opens.
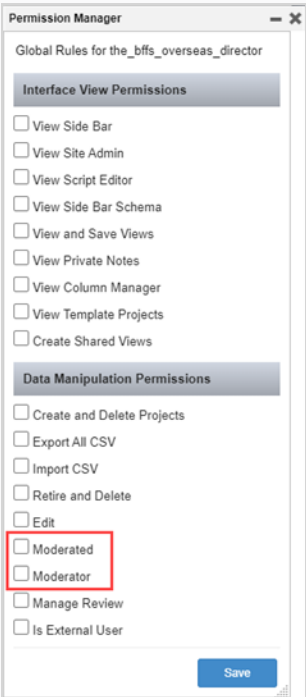
7. In the Data Manipulation Permissions section, check the **Moderator** and **Moderated** checkboxes.

8. Click **Save**.

    Now whenever a Moderated person writes a note—see Writing Notes, the status To Moderate is added within the note. The Moderated has the ability to edit their notes.
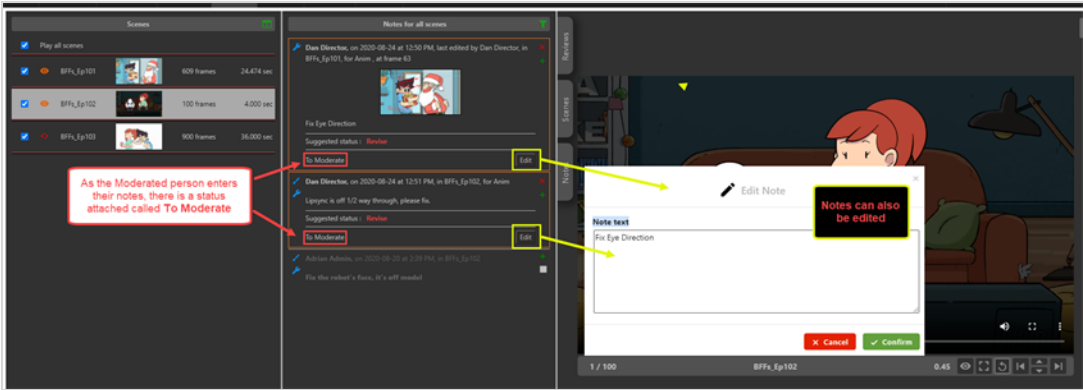
    The To Moderate Status also appears in the Notes column of the Open Tasks tab for any user designated as a Moderator.
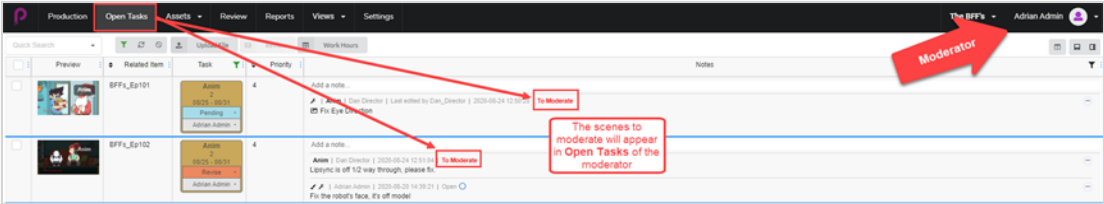
How to view and moderate notes

1. In the main menu, select **Review**.

2. In the Review tab, in the Open Reviews section, select a review.

   In the Notes for [scene name] section, the notes to moderate are displayed. The notes are marked in Orange.

   By default you will be able to see one scene at a time. To see all scenes to moderate in this review session, click on the green **Filter notes displayed** icon and select **For all scenes**.
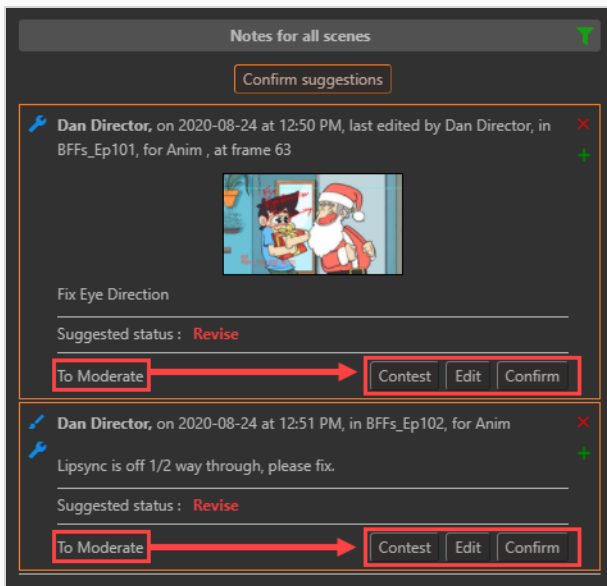
3. Select one of 3 options:

   - **Contest**, if a note is contested, it will NOT appear in Open Tasks of the Moderated person, but will appear in the Notes in the review session.

   - **Edit**, if a note is contested, click on Edit to place a note as to why.
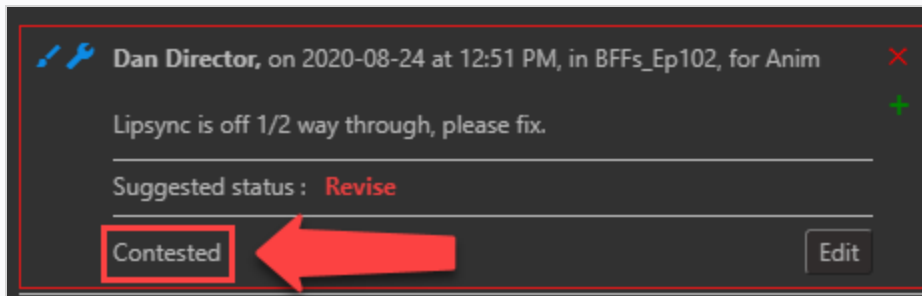
   - **Confirm**, if a note is approved it will appear in full view of the production.

   Alternatively, if you as the Moderator agree with all notes, click on the Confirm Suggestions
   Confirm suggestions button to confirm all.

If there is a contested note, the Confirm Uncontested Suggestions [Confirm uncontested suggestions] button appears.

> **NOTE**
>
> Anyone who is not a moderator will not see any notes from the Moderated UNTIL they are approved by the Moderators.

Closing and Reopening Notes in the Review Session

When a note is created, its status is set to Open. Notes can be closed to indicate that they have been acknowledged or tended to, and they can be reopened to indicate that they need further attention.

To avoid cluttering the Notes column, notes that have been closed are hidden by default. It is possible to display them so that they can be viewed reopened if needed.

How to close a note

1. Open the review session containing the scenes for which you want to close or reopen notes.

2. Do one of the following to display the note you want to close:

3. In the Scenes column, select the scene containing the note you want to close.

4. Make the Notes column display the notes for all the scenes in the review session.

5. In the Notes column, find the note you wish to close.
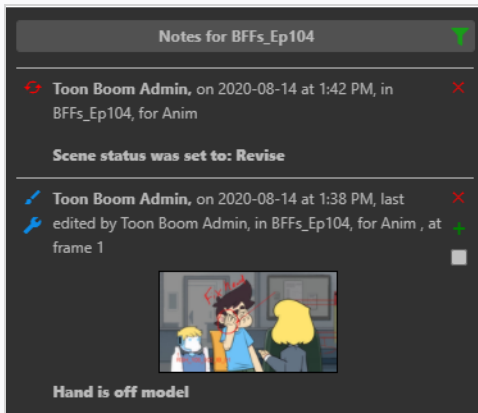
> **NOTE**
>
> All new notes are ☐ Open by default.

6. To close an open note, check the checkbox in its bottom-right corner.

   The status of the note is be set to ☑ Closed. Unless you enabled displaying closed notes in the Notes column, it will disappear from the Notes column.

How to reopen a note

1. Open the review session containing the scene for which you want to reopen a note.

2. In the Notes column, click the **Search** button.

3. In the drop-down menu, make sure **Closed** is checked.
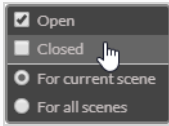
Closed notes appear in the notes list.

4. Do one of the following to display the note you want to reopen:

   - In the Scenes column, select the scene containing the note you want to close.

   - Make the Notes column display the notes for all the scenes in the review session.

5. Find the note you wish to reopen.

6. To open a closed note, check the checkbox in its bottom-right corner.

   The note will now be ☐ Open.

7. To hide the other closed notes, click the Filter ▼ button again.

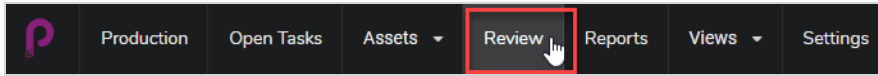8. In the drop-down menu, uncheck the checkbox next to Closed.
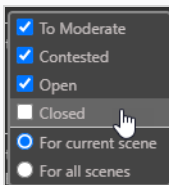
All closed notes will now be hidden from view.
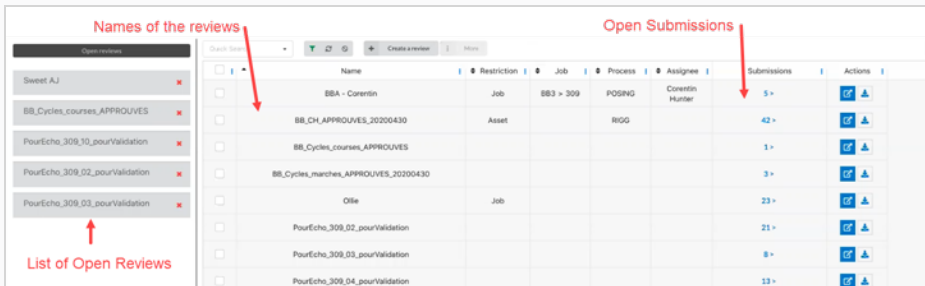
Downloading Reviews

Producer gives you the ability to download the reviews on your local machine.

How to download reviews

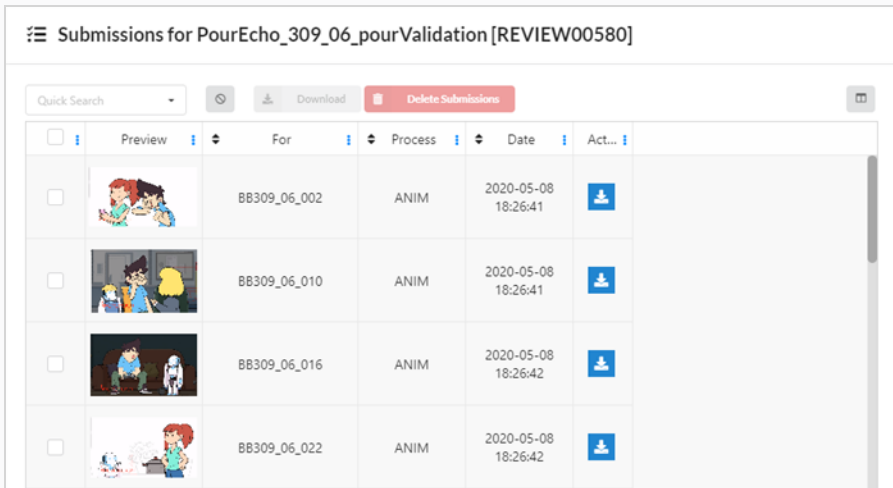1. In the top menu, select **Review**.

   You will then see Open Reviews, Names of the Reviews and Open Submissions.
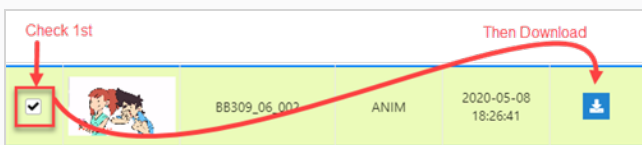

2. To view a submission, click on the number in the submission column.

   The Submission window opens.

3. You can now download individual reviews by clicking on the check box on the far left and then on the blue button in the Actions column. You may select as many check boxes as you like but you must select each download button to download individually.

4. You can also download multiple scenes at the same time into a Zip folder. Select all the scenes you wish to download and then click on the Download button above the entries.
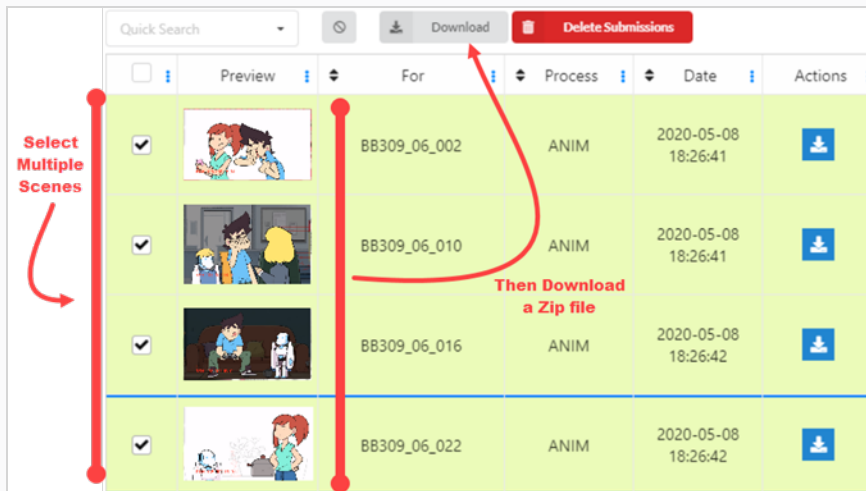
5. If you wish to download a full review with all the videos stitched together, select the review you wish to open from either the Open Reviews area or by selecting the Open Review ☑ button from the Actions column.

   A new window opens.

6. In the Scenes area, check the select all boxes or select the individual videos you wish to have stitched together.
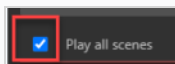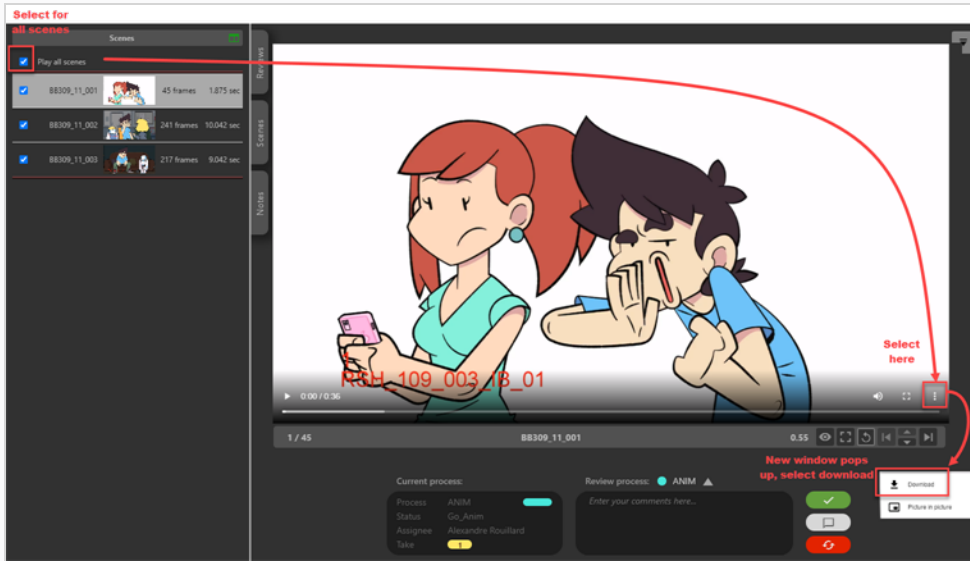

7. In the Play window, select the more options button to the bottom right of the screen.

   A new window opens.

8. Select **Download**.

> **NOTE**
>
> If there are red lines separating the videos, there was a problem stitching the videos together. It could have be cause by a number problems, ie: video codec, audio codec, fps, timebase, aspect ratio.
>
>

# Chapter 11: Exporting CSV Notes and Reports

Producer allows you to download notes and reports.

How to export notes

1. In the main menu, select **Production**.

2. From the Environment and Job drop-down menus, select an environment and job.

3. In the list of scenes, select one, several or all the scenes from which you would like to export notes by checking their respective checkbox.

4. In the Production tab toolbar, select **More > Export CSV**.
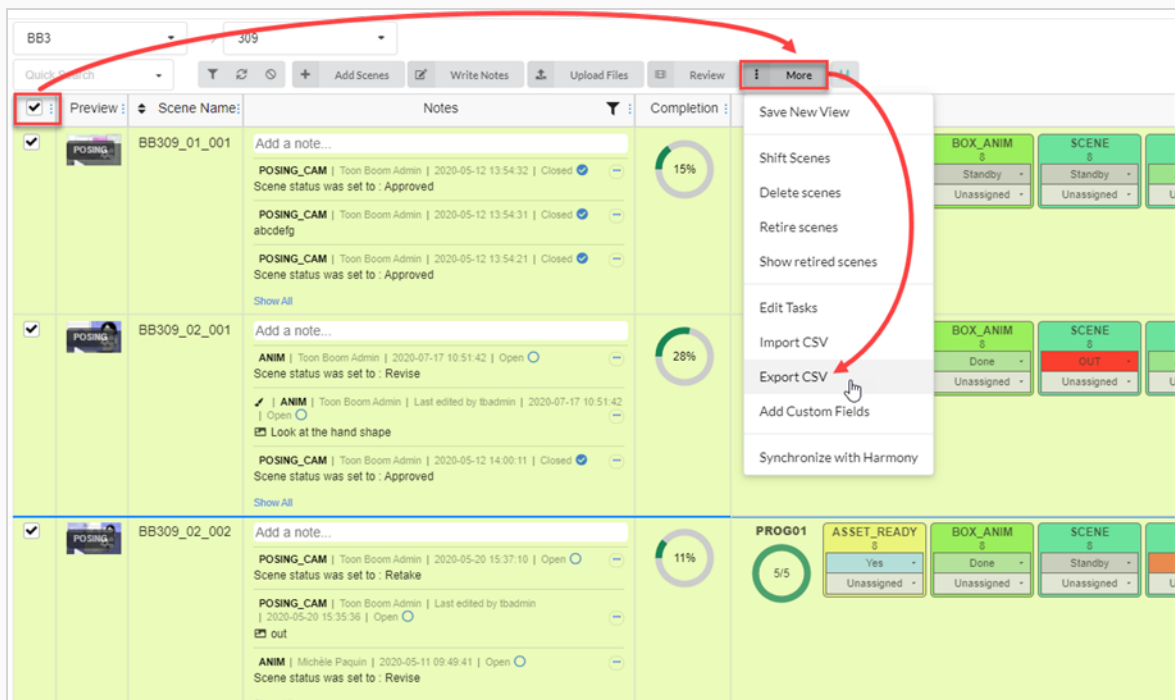

The Export CSV window appears.
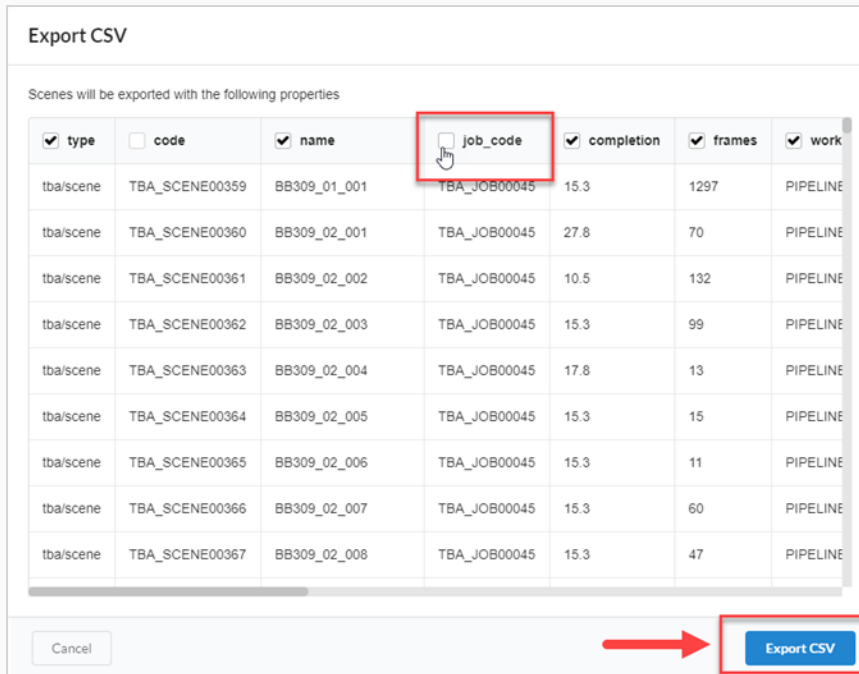
5. Check or uncheck the column checkboxes to select which categories you would like to appear in your exported CSV file.

6. Click **Export CSV**.

    A CSV file automatically downloads.

How to export reports

1. In the main menu, select **Reports.**

2. In the Reports tab, select the type of report you would like to create (Job Tasks, Productivity, Progress or Summary).
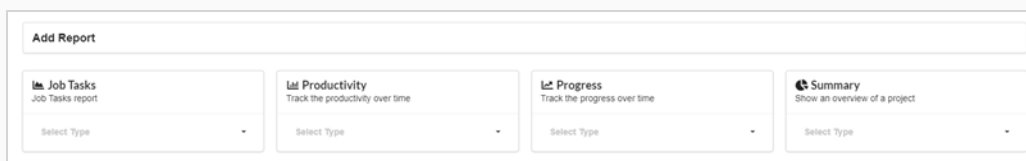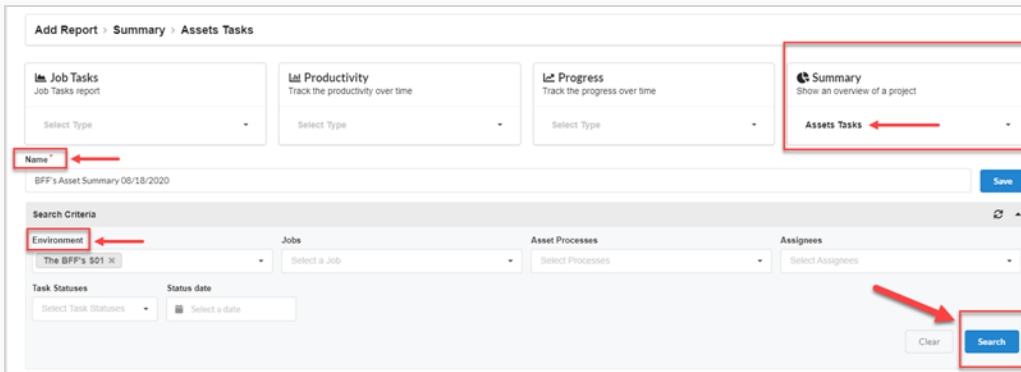

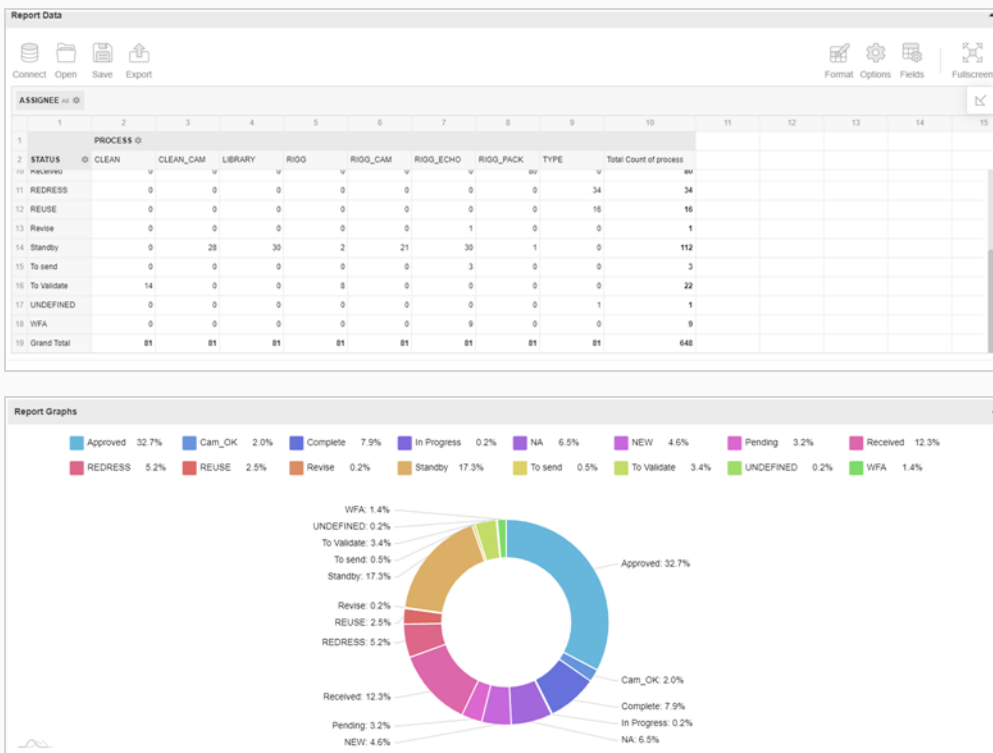3. In the report type's drop-down menu, select a specfication.
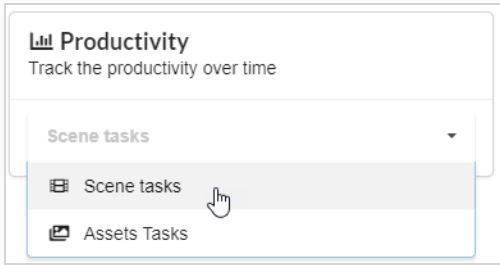
The report options appear.

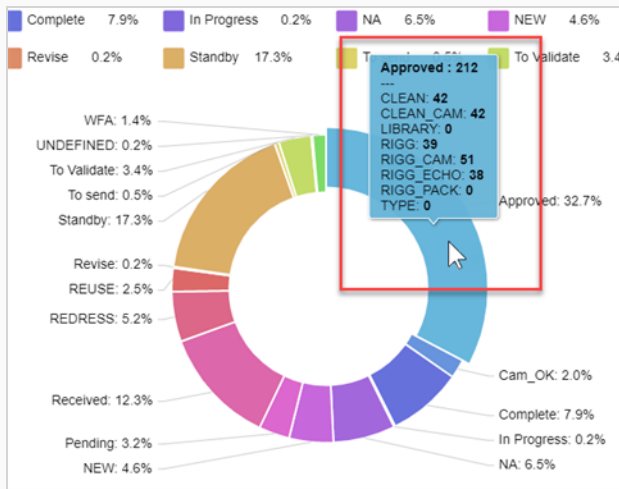4. In the Name field, type in the name for the report.

5. Click **Save**.

The report is displayed and is saved in the Saved Reports column on the left.

You can display additional information by hovering your mouse over different areas of the graph:
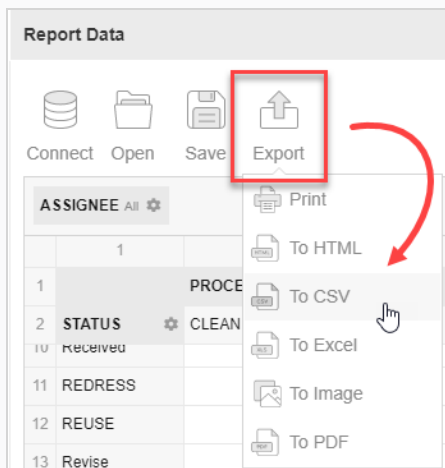

6. In the Search Criteria section, use the drop-down menus to select specifics that you would like to find in the generated report.

7. Click on the **Search** button to initiate the search.

   The search results from the generated report are displayed.

> **NOTE**
>
> You can continue to generate reports and access them later from the Saved Reports column. You can use the Search feature at any time to search for specific data from any generated report.

8. If you would like to export a CSV of this particular report, in the Report Data section of the generated report, click on **Export >To CSV**.

A .csv document downloads.