

Producer 22

Toon Boom Producer 22 User Guide

TOON BOOM ANIMATION INC.
4200 Saint-Laurent, Suite 1020
Montreal, Quebec, Canada
H2W 2R2

+1 514 278 8666
contact@toonboom.com
toonboom.com

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

07-12-2022

Copyright © 2022 Toon Boom Animation Inc., a Corus Entertainment Inc. company. All rights reserved.

Contents

Contents	3
About Producer	8
Benefits	9
Features	10
User Guide	11
Chapter 1: About the Interface	12
Production Toolbar	14
Search and Filtering Tools	14
View Tools	14
List button	14
Tiles button	15
Column Selector	15
Toggle Bottom and Side Panels	16
Additional Options for Selected Items	17
Adding and Removing Columns	18
Creating Views	19
Managing Views	21
Chapter 2: About Users and Permissions	23
Creating Users	25
Editing and Adding Users to Groups	27
Groups	27
Edit User	27
Chapter 3: About Workflows	29
About Task Status Workflows	30
About Included Workflows	31
Episodes	31
Basic	31
Complete	31
Double Approval	31
Single Approval	31
BG	31
Character	31

Prop	32
Basic Task Workflow	32
Simple Task Workflow	32
Approval	32
Duplicating Workflows	34
Creating Workflows	36
About Processes	38
Manual	39
Approval	40
Asset Progress	41
Adding Processes to Workflows	42
Configuring Processes	44
Moving Processes	47
Deleting Processes	48
About Behaviours	49
Adding Overview Processes to Job Workflows	53
Chapter 4: Production	57
Creating Projects	58
Creating Environments	60
Creating Jobs	61
Creating Scenes	64
Editing Tasks	66
Writing Notes	68
About Gantt Charts	70
Scene Focus View	71
Chapter 5: About Assets	73
About Asset Details	74
Creating Assets	77
Searching for Assets	80
Navigating Assets	83
Editing an Asset	84
Deleting an Asset	86
Adding a Preview Image for an Asset	88

Downloading an Asset Movie Clip	90
Viewing Preview Image Versions	91
Replacing Asset Tasks	93
Adding Tasks	96
Removing Tasks	99
Retiring Assets	101
Viewing Retired Assets	102
Activating Retired Assets	104
Chapter 6: About Monitoring the Workload	107
Assigning Tasks	108
Checking Open Tasks for Work and Notes	110
Updating Status Manually	111
Logging Work Hours	112
Uploading and Updating Snapshots	113
Verifying a User's Workload	116
Creating Custom Fields	119
Searching in Producer	121
Chapter 7: About CSV Import and Export	123
About Creating a CSV File	124
Exporting CSV File	125
Displaying the Environment and Job Codes	127
Uploading a CSV File and Copy/Pasting Data	129
Chapter 8: About Assembly	133
Navigating and Searching the Production List	134
Browsing and Finding Assets	137
Assembling	142
Disassembling	145
Checking the Asset Progress in a Scene Workflow	146
Chapter 9: About Harmony Integration	149
Working Remotely	150
Configuring Access	151
Setting up the Cloud Exchange	154
Exporting and Managing Scenes Offline	156

Exporting Scenes Offline	157
Analyzing the Outcome of an Export	163
Opening Offline Scenes	164
About the Open Offline Scene Dialog	172
Uploading Work	177
Updating Snapshot Scripts in Harmony	187
About Harmony Synchronization	189
About Sending Assets to Harmony (Baking)	197
Requirements for Baking	198
Sending a PSD file into a Harmony scene	199
Baking a Scene Template into a Harmony	203
Chapter 10: About Reviewing	205
Creating a Temporary Review Session	206
Creating a Permanent Review Session	208
Sharing Review Session	210
Sending Scenes for Review	211
Filtering a Review Session	212
Editing a Review Session	213
Opening a Review Session	215
Returning to the Session List and Switching Sessions	217
Removing Scenes from a Review Session	219
Deleting a Review Session	221
Playing Preview Movies	223
Adding a Note to a Scene in a Review Session	224
Drawing Annotations While Reviewing Scenes	227
Sending a Scene in a Session for Revision	229
Approving a Scene in a Session	230
Viewing Notes in a Review Session	231
Moderating Notes	232
Closing and Reopening Notes in the Review Session	236
Downloading Reviews	238
Chapter 11: About Importing from Storyboard Pro	241
Importing from Storyboard Pro	242

Chapter 12: About Reports	249
Workload Manager	250
Sharing Reports	260
Exporting Reports	261

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 22 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

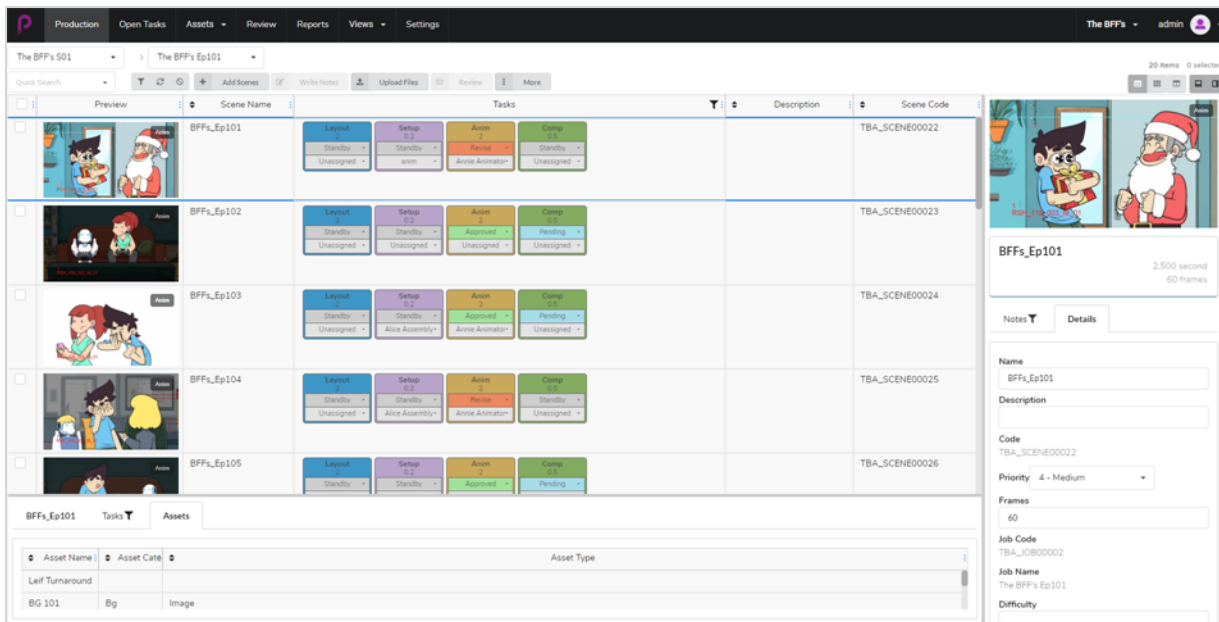
- Customizable workflows, user profiles and roles
- User-friendly interface
- Dashboards and detailed reporting
- Job task reports
- Progress report
- Team productivity reports
- Access to in-app analytics and graphs
- Graphical scene status dashboard
- Customizable & Automated triggers
- Advanced filtering 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

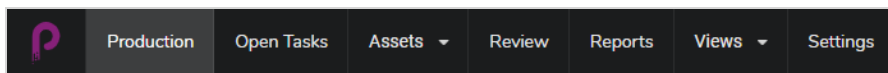
The following guide explains how to use all the core functionalities of Producer. It is addressed to all kinds of project contributors, depending on the task they wish to accomplish.


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.
Reports	Allows supervisors, directors, and producers to analyze data and progress through a variety of customizable reports.

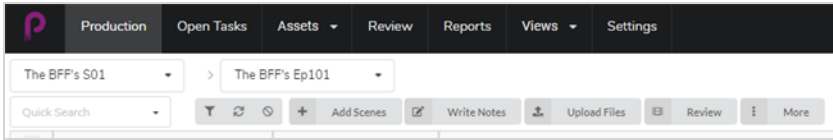
Page	Description
Views	Allows users to create and share custom views with custom columns.
Settings	Allows administrators to configure Producer by creating users, setting permissions and groups, creating workflows, and managing projects.

NOTE

Users will have access to different pages and menu items based on their level of permissions—see [Creating Users](#).

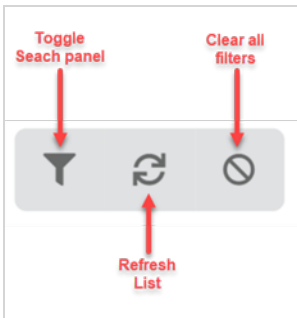
Production Toolbar

A lot of the operations in the Production and Asset pages are performed through the Production toolbar.



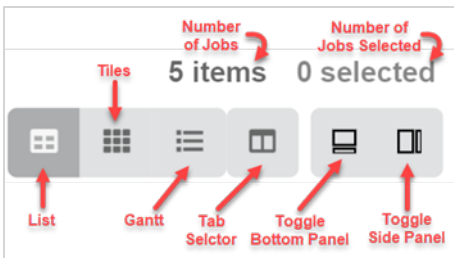
Search and Filtering Tools

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

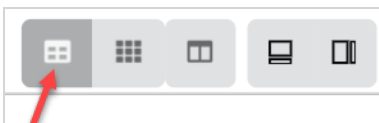


View Tools

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.

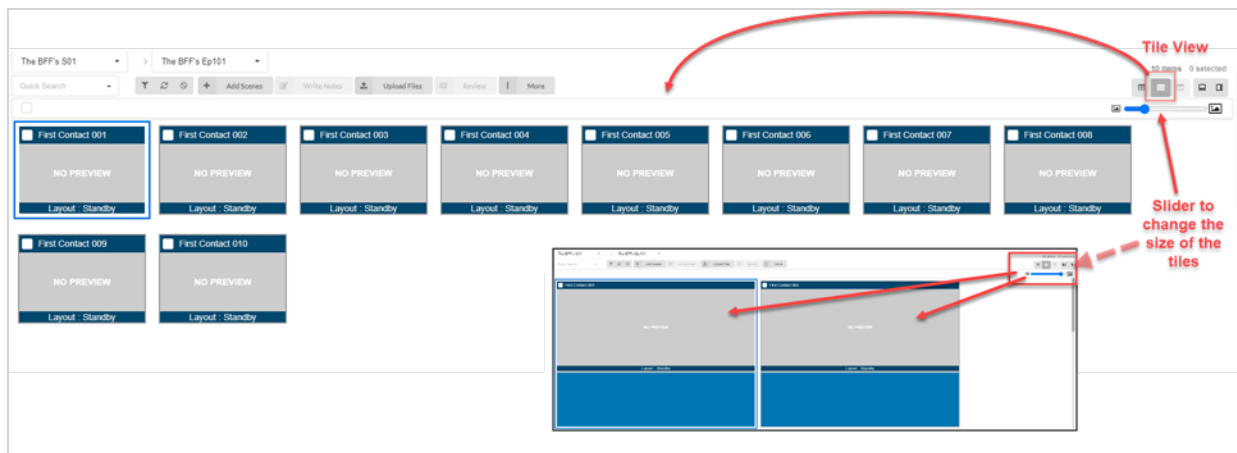
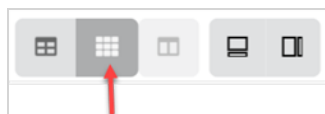


List button



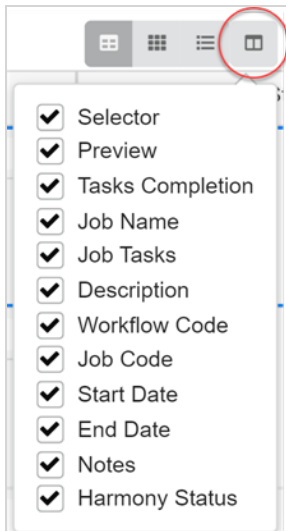
Scene Name	Tasks	Completi	Priority	Preview	Frames	Duration	Workflow Code	Scene Code	
First Contact 001	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note
First Contact 002	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note
First Contact 003	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note
First Contact 004	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note
First Contact 005	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note
First Contact 006	Layout, Layout_Check, Setup, Anim, Anim_Check, Comp, Comp_Check	0%	4 - Medium	NO PREVIEW	60	2 sec 12 fr	the_bff/single_ap	TBA_SCENE000	Add a note

Tiles button



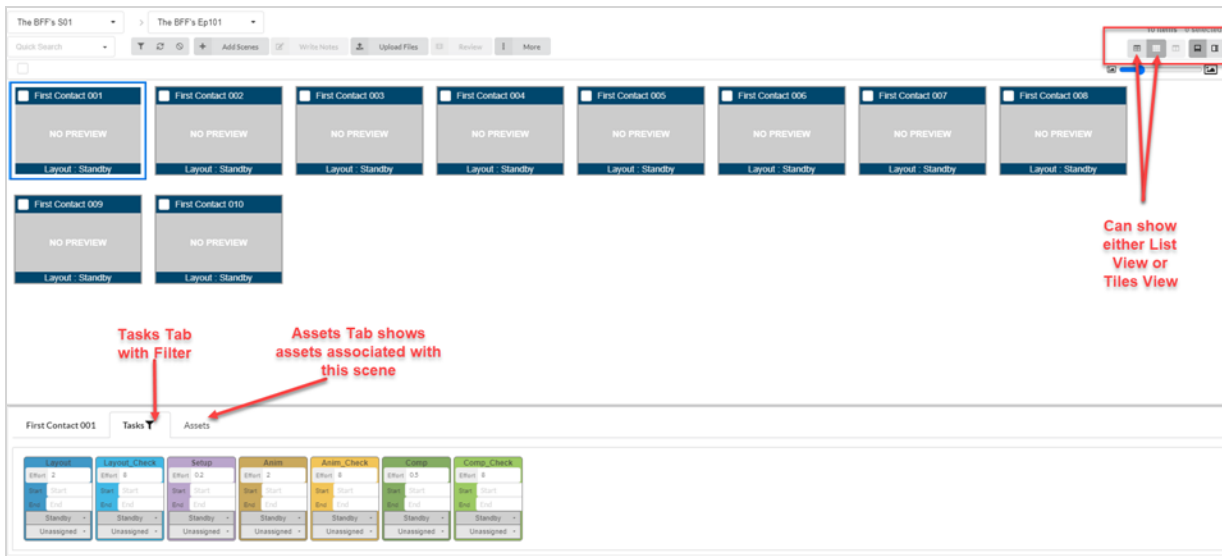
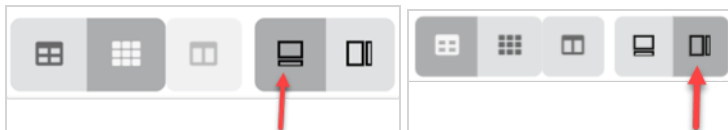
Column Selector

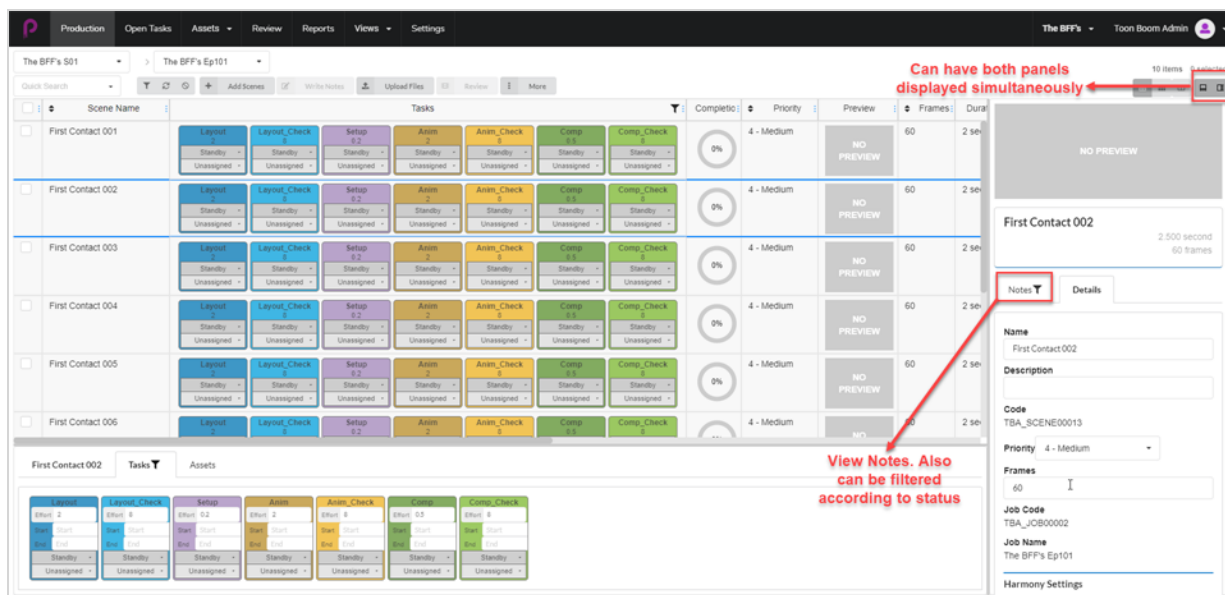
With the Column Selector you can choose how many columns are displayed in your main list. Uncheck the boxes on the ones you wish to hide.



Toggle Bottom and Side Panels

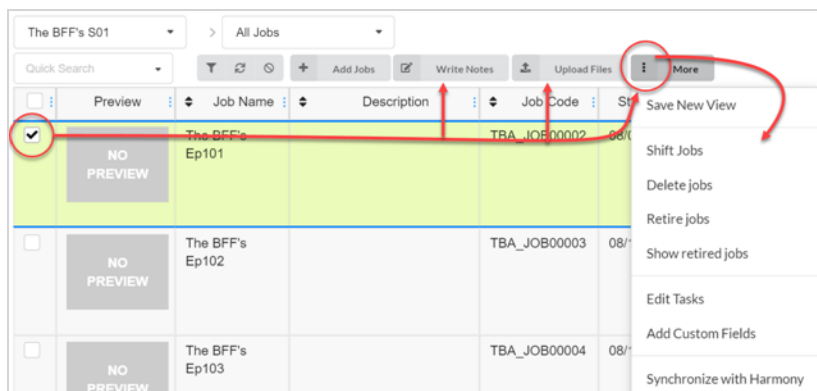
You can display additional information for each selected job, scene or asset using the side and bottom panel.





Additional Options for Selected Items

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

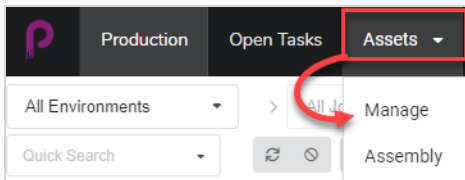


Adding and Removing Columns


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

How to add and remove columns

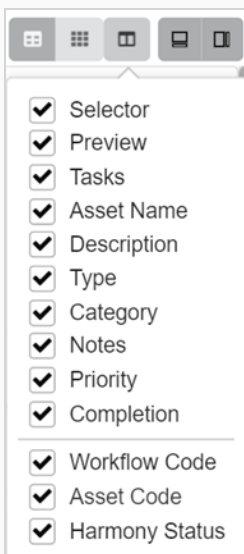
1. In the top menu, click **Production** or **Assets > Manage**.



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.

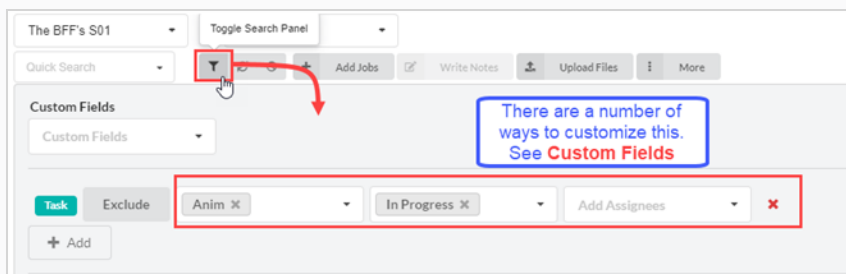
How to save a custom view

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.

Save New View

View Name
View Name

Save Current View Settings only
 Save Current Environment or Job
 Save Search Data

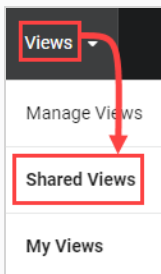
Add Link to Views

Cancel Save View

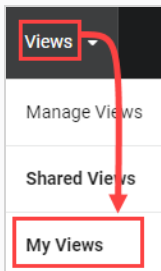
Add Link to Views
Add Link to Shared Views

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.

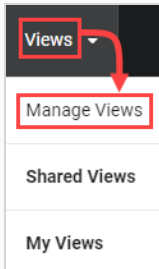


Managing Views

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**.

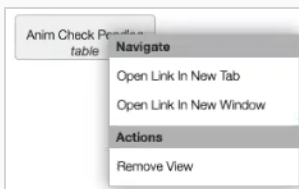


My Saved Views and Shared Views appears.



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

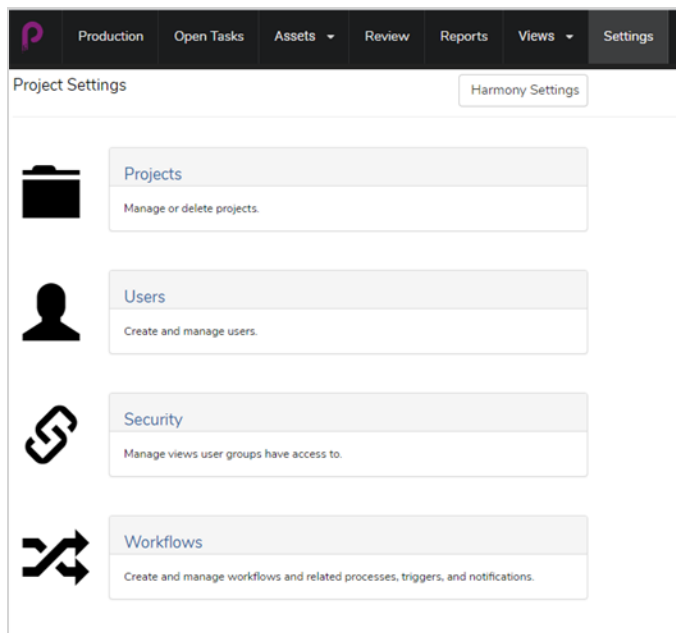
Anyone using Producer on a regular basis should have their own login credentials. This allows permissions control as well as task assignment and effective communication within Producer. Note that the permissions are handled through groups, for better efficiency. A user can be part of many groups and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

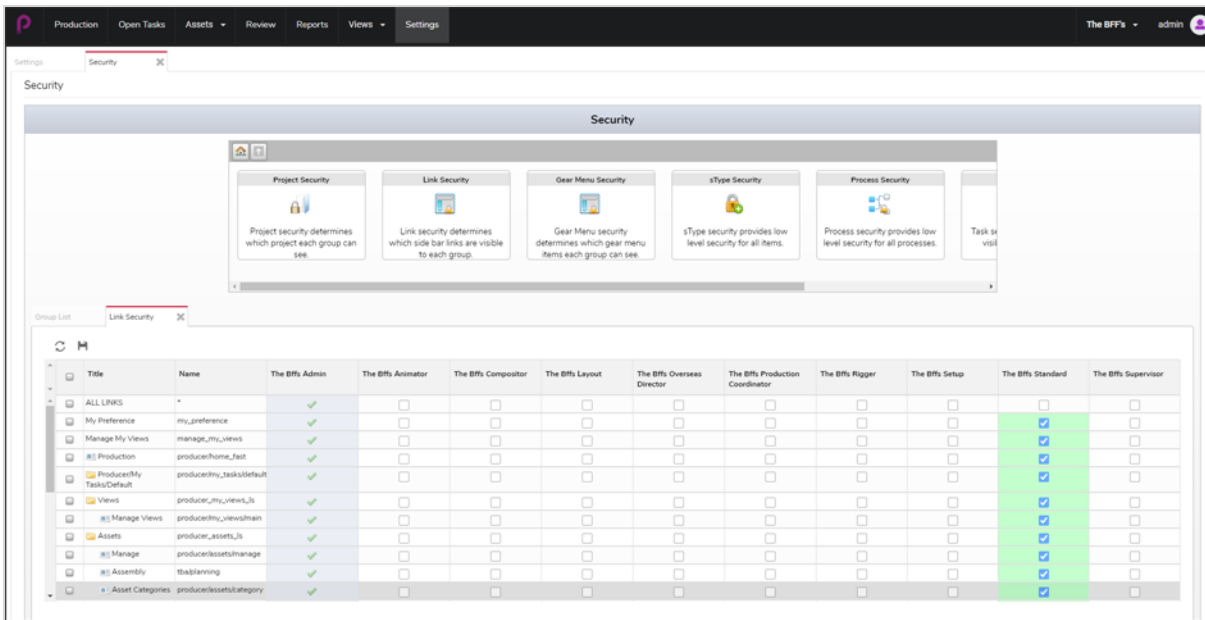
NOTE

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

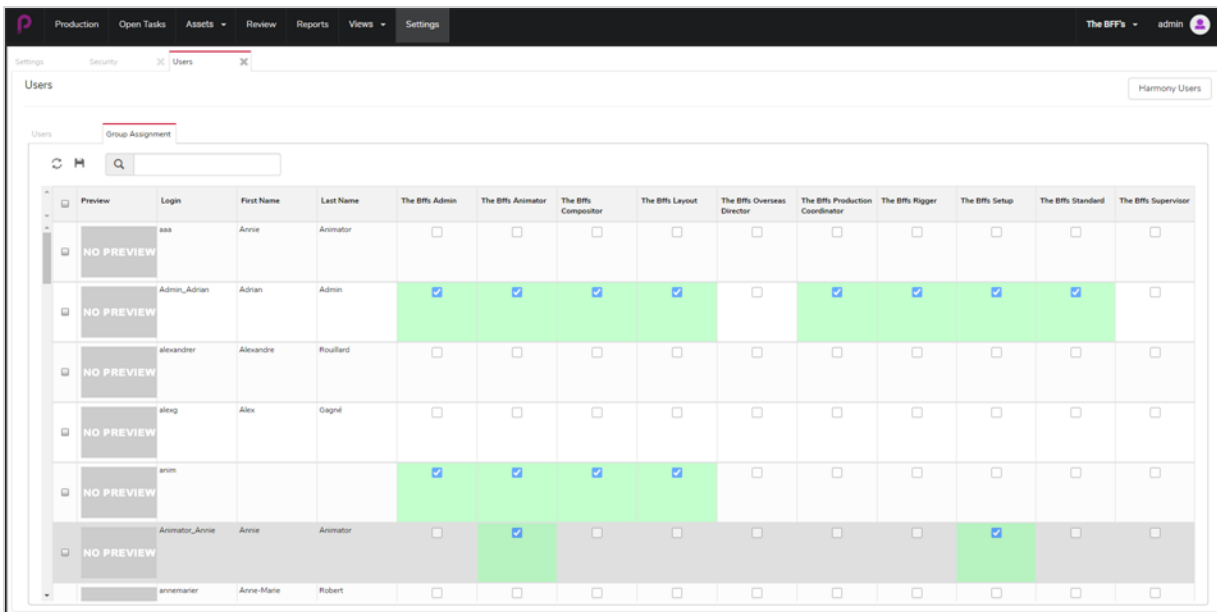
Users, groups, and permissions can be access via the Settings page.



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.

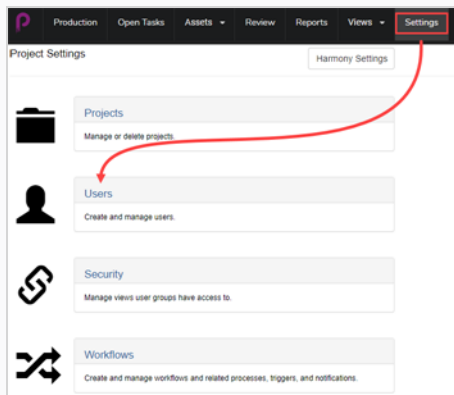


Creating Users

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

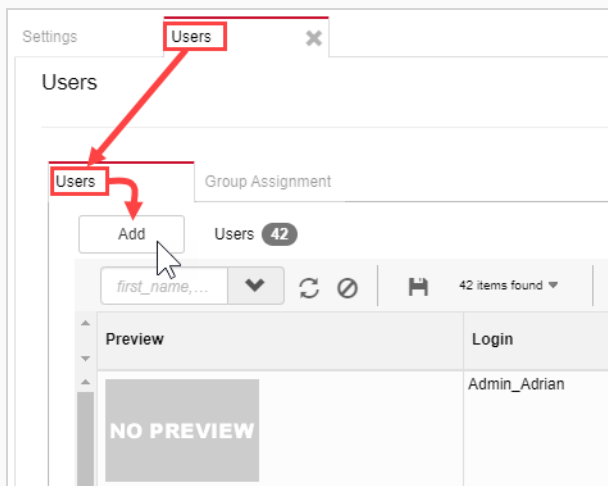
How to add a user

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.

The screenshot shows a 'Create New User' dialog box with the following fields and sections:

- NO PREVIEW** button
- Preview** section with a **Browse** button
- Login** text box
- User Principal Name** text box with a tooltip: *The email format version of a login. This can be changed after creation*
- Authentication** section with **Password** and **Password Re-Enter** text boxes
- Information** section with **First Name**, **Last Name**, **Email**, and **Department** text boxes
- Add** and **Cancel** buttons at the bottom

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				

A red arrow points from the 'Display Name' column to the 'Groups' column. A red box highlights the 'Groups' column with the text: '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.

Group Assignment - X

User: Joe Smith

+ Save

Groups

- the_bffs_admin (Administrator)
- the_bffs_animator (Animator)
- the_bffs_compositor (Compositor)
- the_bffs_layout (Layout)
- the_bffs_overseas_director
- the_bffs_production_coordinator
- the_bffs_rigger (Rigger)
- the_bffs_setup (Scene Staging Setup)
- the_bffs_standard (Standard user)
- the_bffs_supervisor (Power user)

Edit User

Allows you to edit the user profile and login credentials.

Edit User - X

Save changes to Users (Joe_Smith)

NO PREVIEW

Preview

Login

User Principal Name

Authentication

Password

Re-enter Password

Information

First Name

Last Name

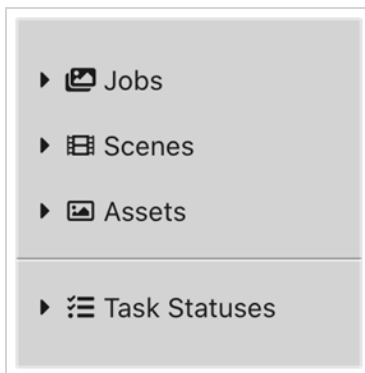
Display Name

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. These custom pipelines can easily be reproduced with Producer's workflow editor. When talking about the process of a studio, the terms "workflow" and "pipeline" are often used interchangeably; however, we always use "workflow" when referring to the actual node structure in Producer. Each "node" represents a process to be completed. These processes will become individual production tasks that will be assigned to artists and supervisors.

Layout	Layout_check	Layout_App	Setup	Rough_Anim	RoughAnim_App	Cleanup_Anim	Cleanup_Check
Approved ▾	Approved ▾	Approved ▾	Approved ▾	Approved ▾	Approved ▾	Revise ▾	Retake ▾
Joe Grey ▾	Frank Banner ▾	Kelly Parker ▾	Jade Jonah ▾	Lea Luthor ▾	Kelly Parker ▾	Lea Luthor ▾	Carina Allen ▾

There are four types of workflows: Job workflows, Scenes workflows, Asset workflows and Task Status workflows.



For example, you may use a job workflow to track an episode's development from script to delivery however you would use a scene workflow to track the production of shots from layout to compositing while the asset workflow is designed to handle the evolution of various assets such as backgrounds, characters, props, etc. The task status workflow is somewhat special because it allows the user to customize the task statuses for the processes of the other workflows.

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 [Configuring Processes](#).

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.

Name	Colour	Order	Progress	Actions
Standby	Grey	1	0%	[Edit] [Remove]
Pending	Light Blue	2	5%	[Edit] [Remove]
Need Assistance	Purple	3	30%	[Edit] [Remove]
In Progress	Yellow	4	30%	[Edit] [Remove]
To Validate	Orange	5	70%	[Edit] [Remove]
Revise	Red	6	80%	[Edit] [Remove]
Approved	Green	7	100%	[Edit] [Remove]

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.

Task Name	Count	Current Status	Assigned To
Layout	2	Standby	Bob BG
Layout_Check	8	Standby	Unassigned
Layout_App	8	Standby	Sal Supervisor
Setup	0.2	Standby	
Anim	2	Standby	Annie Animator

- ✓ Standby
- Pending
- Need Assistance
- In Progress
- To Validate
- Revise
- Approved

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 such as episodes of a TV series.



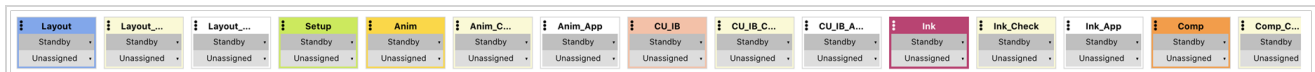
Basic

Workflow to track scenes in a simple manner.



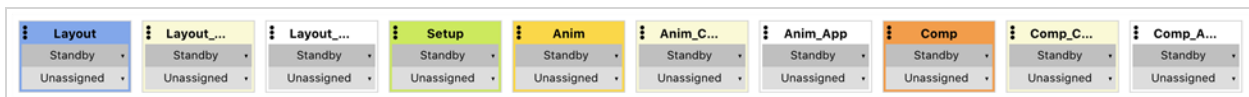
Complete

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



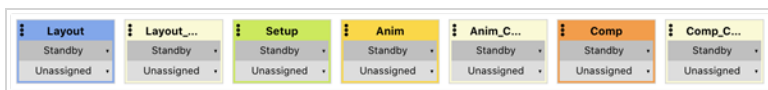
Double Approval

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.



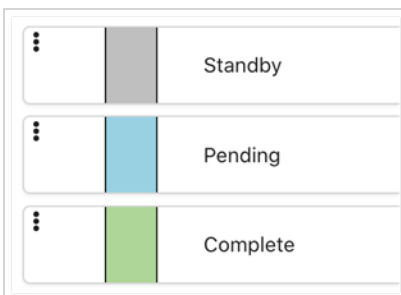
Basic Task Workflow

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).



Approval

This workflow provides typical statuses for approval processes.

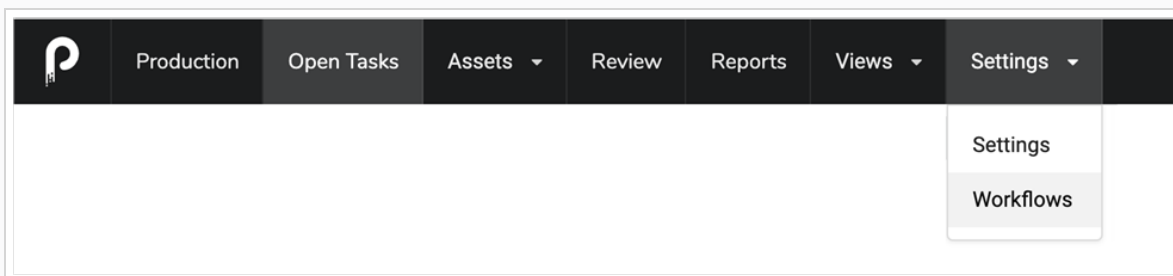
⋮	Standby
⋮	Pending
⋮	Retake
⋮	Approved

Duplicating Workflows

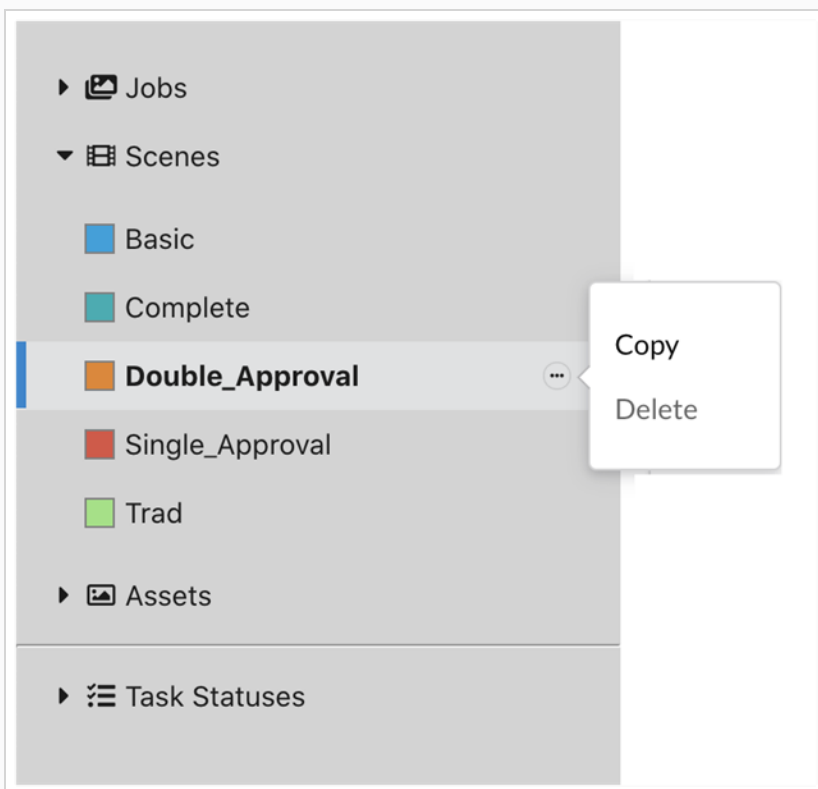
The workflows that are provided with Producer are useful templates to create your own. It is NOT recommended to use them directly as they may be updated and modified in future versions. Instead, duplicate and modify them to match your own pipeline.

How to duplicate workflows

1. In the main menu, select **Settings** and then **Workflows**.



2. In the **Project Workflows** list on the left, click on the workflow you wish to duplicate and select **Copy** from the ellipsis menu ("...").



The Copy Workflow Details dialog box opens.

Copy Workflow

Name ⓘ*

Type ⓘ*

Colour ⓘ

Copy From ⓘ

The new workflow will be a copy of Double_Approval.

3. In the Name field, enter the name of the new workflow.
4. In the Colour field, use the colour picker widget to select an identification colour.
5. Click **Create**.

Creating Workflows

How to create a workflow

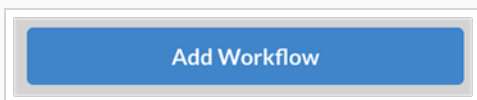
1. In the main menu, select **Settings > Workflows**

The Workflows tab opens.

NOTE

If the **Settings** or the **Settings > Workflow** options are not available, an admin user may have to grant these privileges to a group that you are a member of. This can be done in **Security**, under **Global Rules**, by enabling **Manage Workflows**.

2. Click on the **Add Workflows** button.



Add Workflow

Name ⓘ

Type ⓘ

Colour ⓘ

Copy From ⓘ

The **Add Workflows** dialog opens.

3. In the Name field, enter the name of the new workflow.
4. In the Type drop-down menu, select the type of item to which this workflow applies. For workflow of episodes, select **Job**. For a workflow tracking shots, select **Scene**. For a workflow of backgrounds, characters or props, select **Asset**. If you would rather create a Task Statuses workflow, refer yourself to the section How to create a task statuses workflow.
5. In the Colour field, use the colour picker widget to select an identification colour. Note that you can use the colour picker icon to pick a colour from anywhere on your desktop. After your colour selection simply click outside the widget to proceed.

NOTE

It can be a good idea to create a workflow based on an existing one. To do so, use the **Copy From** field (or simply leave it blank to create a workflow from scratch.)

6. Click **Create** to create the workflow.

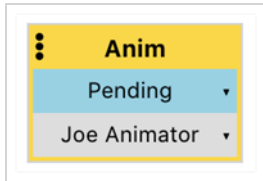
Next, you will want to add Processes to your workflow. Check out the section on [Creating Processes](#).

About Processes

A workflow is made of processes. When creating an asset or a scene using a specific workflow, each process of this workflow represents a task that can be assigned to users. Processes are ordered in a linear fashion. There are 2 main types of processes: Manual and Approval. There is also a special one called Asset Progress.

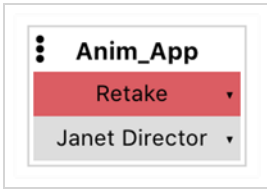
Manual

The Manual Process is used when the work is done by a person (ie not an automated task or a simple approval). This process can have different statuses which are defined in a Task Statuses workflow. The task status is manually changed by the user executing the work.



Approval

The Approval Process 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. Several approval processes can follow one another.



You can attach triggers and notifications to both Manual and Approval processes 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.

Asset Progress

The Asset Progress special process is used to follow the advancements of assets related to a scene, such as backgrounds or characters. The Asset Progress will display a circular graph indicating how many associated assets have reached a specific process in their own workflow.



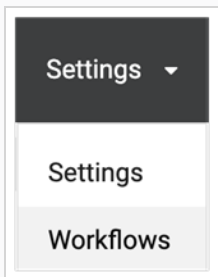
Adding Processes to Workflows

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

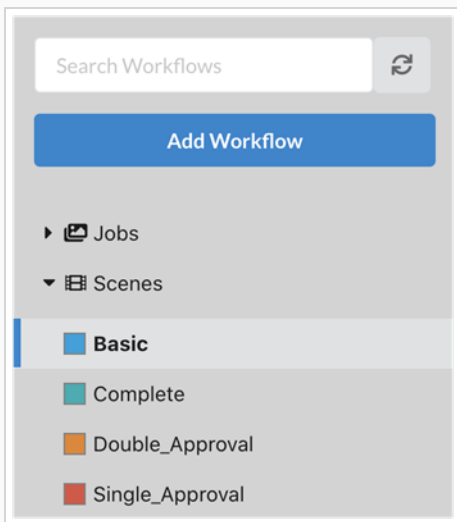
How to add processes to workflows

Whether you want to add processes to a brand new workflow or modify an existing one, the process is the same. You must first select the workflow from the workflow editor.

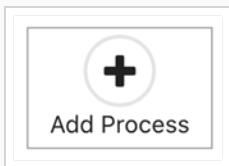
1. In the main menu, select **Settings > Workflows**.

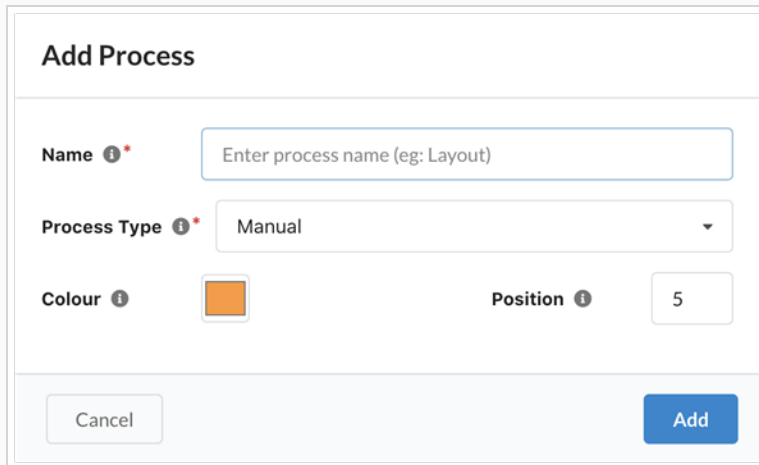


2. From the left pane, select the workflow for which you would like to add a process.



3. To create a new Process in a workflow, simply click on the **Add Process** button.





Add Process

Name ⓘ*

Process Type ⓘ*

Colour ⓘ Position ⓘ

The Add Process dialog opens.

4. Type the name of the process.

NOTE

Choose the name carefully as process names cannot be changed (to avoid corruption). To rename a process, you would have to duplicate it and delete the original.

5. Select a Process Type from the drop-down list. Check the tooltip for more information on the various types of Processes.
6. Select a unique colour that will help identify this process.
7. You can set the Position to modify where this new process will appear in the workflow. By default, it appears at the end. Note that you can always change this position later.
8. Press **Add**.

Check [Configuring Processes](#) to learn how to further configure the process you just created.

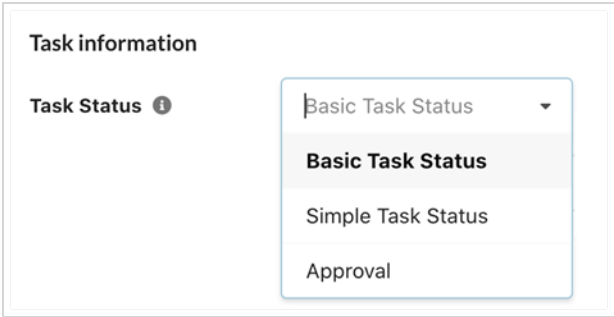
Configuring Processes

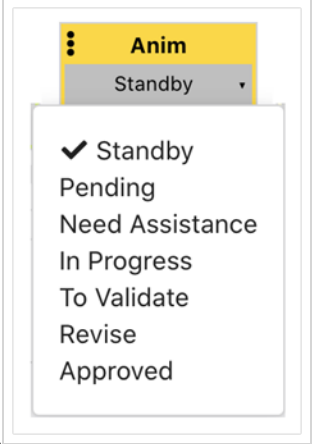
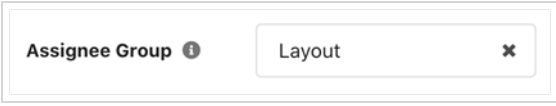
Different types of processes can be configured in different ways. However some configuration options are available for several types of processes. Here is a descriptions of all the options available:

In the Basic Information area:

Option	Description
Name	The name of the process is grayed out as it cannot be changed after the creation. To rename a process, you would have to duplicate it and delete the original.
Process Type	<p>You can change the type of process. There are four types of process available:</p> <p>Manual process is the most basic. It corresponds to typical assignable artists' tasks. Manual tasks may have target durations or completion dates.</p> <p>Approval process acts as milestones for a supervisor to validate work from previous tasks. Approval tasks do not have a set duration.</p> <p>Asset progress reports when workflows of assets used in a scene are completed. They are used in conjunction with Asset Assembly.</p> <p>Overview processes are available only for job workflow. They provide a cumulative overview of the task statuses for all scenes within a job.</p>
Colour	You can set the colour used everywhere to identify this process. The colour selector is simple to use. Note that you can click on the dropper icon to pick a colour from anywhere on the desktop. You also have the possibility to specify a colour using a numerical value. Three modes are available: RGB, HSL and HEX. Simply click outside the colour widget area to confirm your choice. The task (which you can view in Production and Asset > Manage tabs) associated with the node takes on the same colour.
Position	You can set the Position to determine where this process will appear in the workflow, the number one position being the leftmost.

In the Task Information area:

Option	Description
Task Status (Available for Manual and Approval Processes)	<p>Select a Task Status workflow from the drop-down menu to link it to this Process.</p> 

Option	Description
	<p>The Task Status options of that workflow become instantly available as a drop-down menu in the sample task above.</p> 
Assignee Group	<p>Set an Assignee Group to restrict the assignment of these tasks to members of a specific group. This is especially useful if there are many users.</p> 
Completion	<p>Set a number from 0 to 100 to represent the overall progress of the item (job, scene or asset) once this manual task is completed. For example, if a scene is considered 20% completed when the layout is finished, set the "Completion" value of the manual process "Layout" to 20.</p>
Duration	<p>Use this field to specify how many days are needed to complete all the tasks of this process for the whole job. This will set the default value to calculate the due date for the production schedule that can be seen in the GANTT chart. Note that the due date can later be modified per task.</p>
Effort	<p>Use this field to specify how many hours a task should typically take. This can be used to measure performance and track costs when compared to worked hours. Note that the effort can later be adjusted for specific tasks.</p>
Take/Retake	<p>This field will determine whether to keep a track of "Takes" or "Retakes". For example, a task process will typically track a Take number whereas an approval process will typically track a Retake number. You can also set the initial Take or Retake value. To determine when the Take or Retake number will increment, you will set behaviours. To view the current Take or Retake number in the Production page, you will have to edit the column options.</p>

The Asset Progress have different configuration options:

Option	Description
Tracked Workflow	<p>Select the workflow of the assets (associated with the current scene) that you would like to track. For example, if you would like this “Asset Progress” to report on background completion, you should select the asset workflow that you use to build the background assets.</p>
Tracked Process	<p>Select the process that the asset should reach to be considered “complete” for the purpose of this “Asset Progress” report display. For example, If you would like that an asset be considered complete when the Process “BG_Final_Approuval” has been set to “Approved”, then select “BG_Final_Approval” as the “tracked process”.</p>

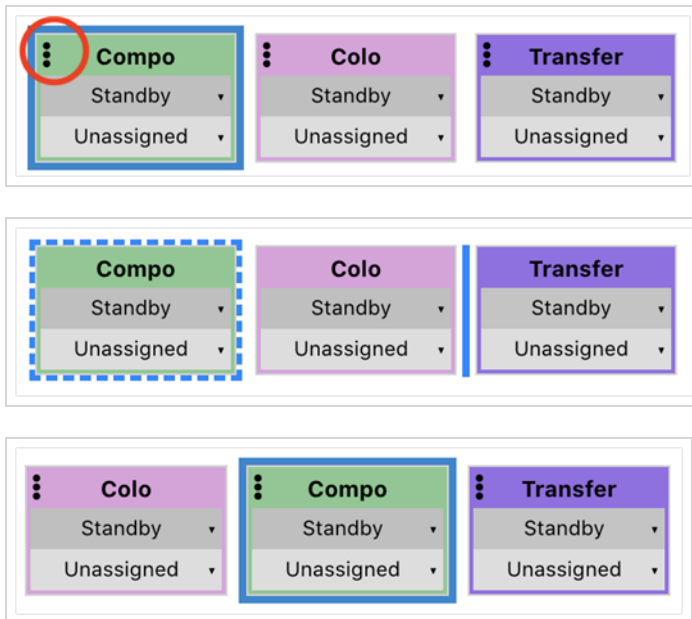
Moving Processes

There are two ways to change the order of processes.

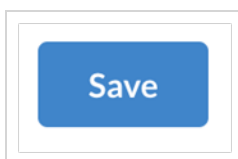
You can do it by changing the value of position:

1. In the Workflow Editor, after selecting a workflow in the left pane, select a process that you would like to move.
2. In the Basic Information area, lower the value of position to move the process towards the beginning of the workflow (left) or increase the value of position to move the process towards the end of the workflow (right).

You can also drag a Process to its new position from its vertical ellipsis:



Both methods require that you save the changes.



NOTE

Changing the position of a process may affect behaviours that are referring to relative processes (Next or Previous process) but will not affect behaviours that are referring to processes by their specific names. Be sure to test the various behaviours after changing the position of one or multiple processes.

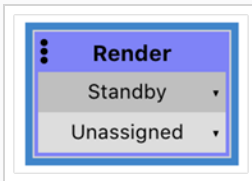
Deleting Processes

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

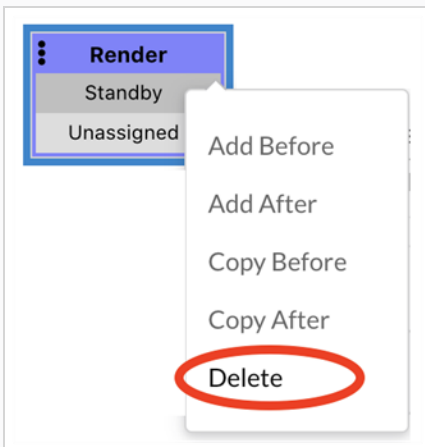
How to delete processes

Deleting a process from a workflow is a simple operation. You must first select the workflow from the workflow editor and then follow these steps:

1. Select the process you would like to delete.
2. Click on the ellipsis icon (“...”) on the top right of the process node.



3. Select “Delete”.



4. Press the blue “Save” button to confirm.

NOTE

Deleting a process from a workflow will be reflected in future instantiation. However, it does not delete currently existing tasks of this process. If you would like to do that, it is recommended that you use the “Edit Tasks” feature prior to deleting the process in the workflow.

About Behaviours

A behaviour determines how a process reacts to certain conditions such as being assigned to a user or being set to a certain status. This reaction can be many things and there can be multiple different actions taken as a result of one condition being met. In essence, behaviours allow you to automate operations. They are a very important part of setting up an effective workflow.

Typical behaviours for a manual process would look like this:

If this process is set to status “To Validate” then set the status of the next (approval) process to “Pending” (ready for review).

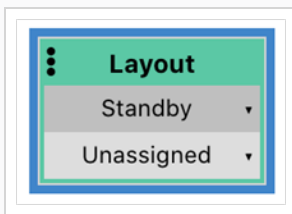
Before creating a behaviour, you must first create a custom workflow—see [Creating Workflows](#) or [Duplicating Workflows](#). It is interesting to note that duplicating a workflow will also duplicate its behaviours.

NOTE

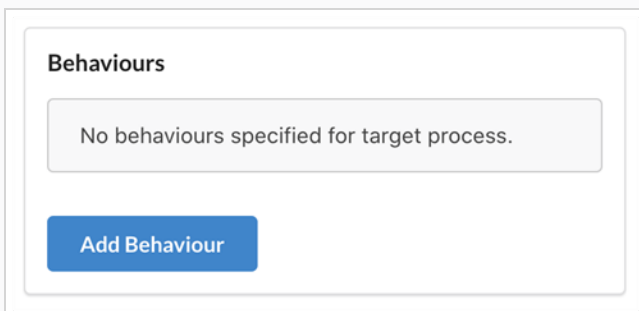
Behaviours used to be called Triggers in older versions of Producer.

How to create a behaviour

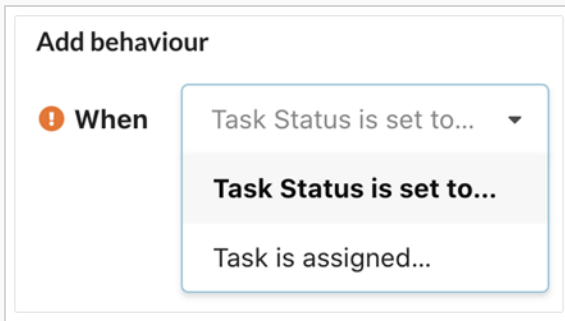
1. In your Workflow, select the process for which you would like to add a behaviour.



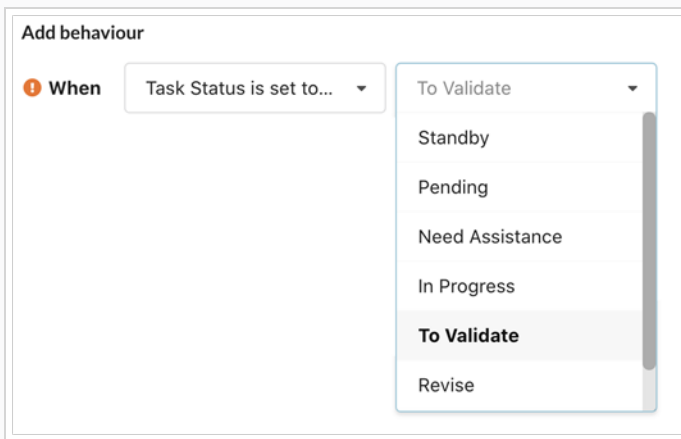
2. In the panel below, click on “Add Behaviour”.



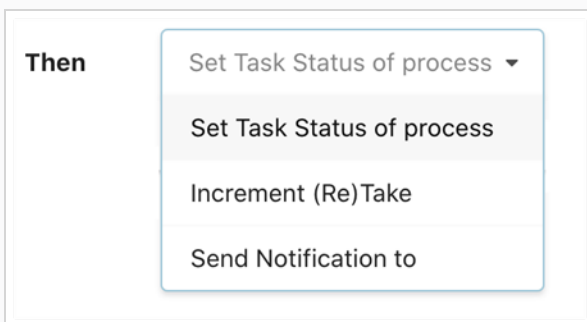
3. Set up a condition by using the drop-down after “When”. Two possible actions are listed:
 - a. Task Status is set to...
 - b. Task is assigned...



4. If the condition requires further setting, another drop down appears next to the first one. For example, if you set “When” to “Task Status is set to...”, you now have to set the “Source Status”, to end up with a condition that sounds like “When Task Status is set to *To Validate*”...



5. You can now set the Action resulting from the condition being met. Next to “Then”, use the drop down to pick one of 3 possible actions:
 - a. Set Task Status of Process
 - b. Increment (Re)Take
 - c. Send Notification to



6. Whichever choice you made in the previous step, you now need to further configure that action.

- a. In the case of “Set Task Status of Process”, you now need to specify which process will be set to which status. For example, you could specify that the action is to Set Task Status of Process Layout_approval to Pending.

The screenshot shows a configuration box for the 'Then' clause. The main dropdown is 'Set Task Status of process'. Below it, there are two sub-dropdowns: 'Layout_App' followed by 'to' and then 'Pending'.

NOTE

When selecting a process, you can either pick a specific process by name or you can use a relative process such as *Next* or *Previous* process. While relative processes can be useful in that they are easier to copy and reuse later with minimal maintenance, it is important to remember that moving the process around could affect the result of the behaviour.

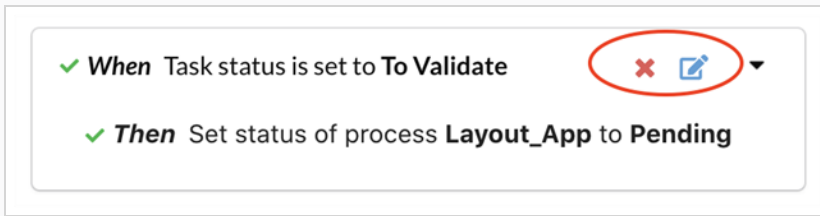
- b. In the case of “Increment (Re)Take”, you need to select which process will increment the value of “Take” or “Retake”, depending on which value this process is tracking.
- c. In the case of “Send Notification to”, you need to select one or multiple contacts to be notified. They can be users or group of users.
7. Now that a first action has been specified, you can either confirm the behaviour with the “Done” button or specify more actions to be executed when the above condition is met. To do so, simply use the dropdown next to the last “Then” and redo step 5 and 6.

The screenshot shows the 'Add behaviour' dialog box. It has three 'When' and 'Then' pairs. The first 'When' is 'Task Status is set to...' and the second is 'To Validate'. The first 'Then' is 'Set Task Status of process' with sub-dropdowns 'Layout_App' and 'Pending'. The second 'Then' is 'Choose an action', which is circled in red. To the right of the 'Choose an action' dropdown are 'Or', 'Cancel', and 'Done' buttons. The 'Done' button is also circled in red. A red minus sign button is visible to the right of the first 'Then' dropdown.

8. After confirming a behaviour, you can review it by clicking on the right triangle next to the Condition.

The screenshot shows a card representing a confirmed behaviour: '✓ When Task status is set to To Validate'. To the right of the text are three icons: a red 'x' for deletion, a blue edit icon, and a red play button (right triangle) for expansion.

The behaviour will expand to display all actions resulting from the condition being met. You can then use the blue edit button to make changes or red “x” icon to delete the behaviour.



After reviewing your behaviour, you can add more behaviours to the same process if you want.

NOTE

Changing the conditions (Status, Assignee) of a process in the upper preview display of the workflow editor WILL NOT trigger the actions programmed through the behaviours. It is highly recommended that you test your behaviours by creating actual items (scenes, assets) using that workflow and changing the conditions to verify that the appropriate actions are happening as expected.

To help you get started, here are some typical behaviours for manual and approval processes:

Common behaviours for manual processes:

- When a task is set to *To Validate*, then set the status of the next approval task to *Pending* and *Increment* the value of *Take* for this process.

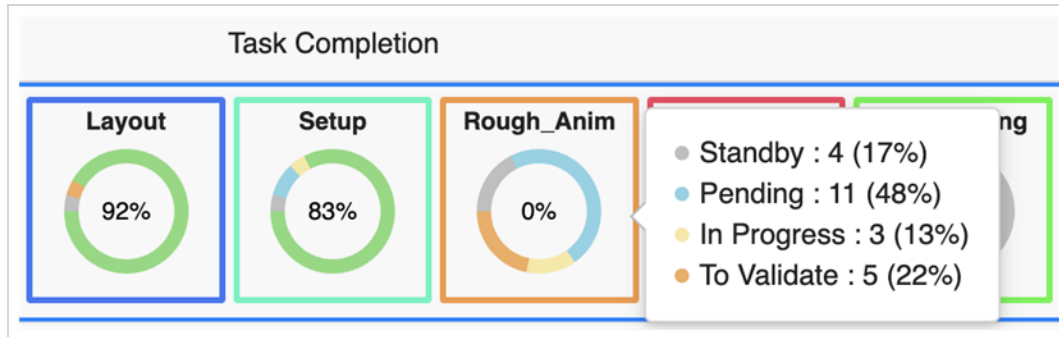
Common behaviours for approval processes:

- When a task is set to *Retake*, then set the status of the previous manual task to *Revise* and increment the value of *Retake* for this process.
- When a task is set to *Approved*, then set the status of the next task to *Pending* and set the status of the previous manual task to *Approved*.

Adding Overview Processes to Job Workflows

While a Job workflow is keeping track of tasks that are relevant to the whole job (such as writing the script or generating the storyboard), it is also possible to be informed of the cumulative statuses of scene tasks contained within a job by adding “Overview” processes. An overview process will look for scene processes with the same name and will summarize the amount of each statuses for convenient display right at the job level, providing an overview of the progress in the Task Completion Column of the Production Page.

Task Completion Overview



How to add an Overview Process to a Job workflow

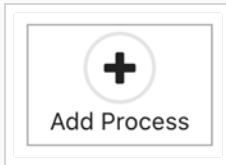
1. In the Workflow Editor, open up the Scene Workflows containing the Processes you are interested in tracking. Identify these processes, noting the exact spelling of their names, the values of completion and duration. The colour can also be useful.

The screenshot shows the 'Workflow Editor' interface. At the top, there is a breadcrumb trail: 'Workflow Editor > Scenes > Basic > Layout'. Below this, there are four task panels: 'Layout' (blue), 'Setup' (green), 'Anim' (yellow), and 'Comp' (orange). Each panel has a 'Standby' dropdown and an 'Unassigned' dropdown. The 'Layout' panel is selected and highlighted with a blue border. Below the panels, there are two main sections: 'Basic information' and 'Task information'. In the 'Basic information' section, the 'Name' field contains the text 'Layout', which is circled in red. The 'Process Type' is set to 'Manual' and the 'Colour' is a blue square. In the 'Task information' section, the 'Task Status' is 'Basic Task Status', the 'Assignee Group' is 'Layout', the 'Completion' percentage is '25' (circled in red), and the 'Duration' is '5' (circled in red).

2. Open the Job Workflow in which you would like to include Overview processes.

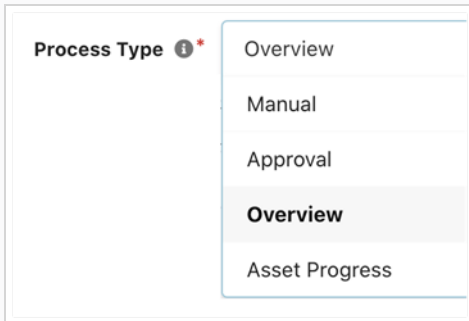
The screenshot shows a dialog box titled 'Add Workflow'. It has a search bar at the top with the text 'Search Workflows' and a refresh icon. Below the search bar is a blue button labeled 'Add Workflow'. Underneath, there is a list of workflow categories: 'Jobs', 'Episode', 'Scenes', and 'Assets'. The 'Episode' category is currently selected and highlighted with a blue bar on the left.

3. Click on the Add Process button



(The Add Process dialog appears)

4. Enter the exact same name as the scene process you want to track.
5. Select the "Overview" process type.



6. It is a good idea to use the same colour as the process you are tracking.
7. Click Add to create the overview process.

NOTE

The new process has two configuration options in the Task Information panel: Completion and Duration.

About Completion:

You should try to adapt the completion value to the context of the whole Job. For example, a Layout represents 25% of a scene's workflow. However, completion of all the episode's layouts could represent 60% completion if it contains lengthy processes such as scripting and storyboarding.

About Duration:

You can reuse the same value as was entered in the scene process. This will help to calculate the Gantt chart.

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.

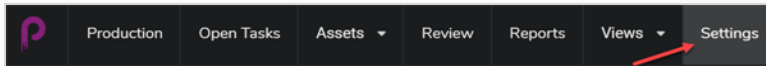
Jobs are a collection of scenes. Typically, jobs are used to separate the episodes of an animated series.

Creating Projects

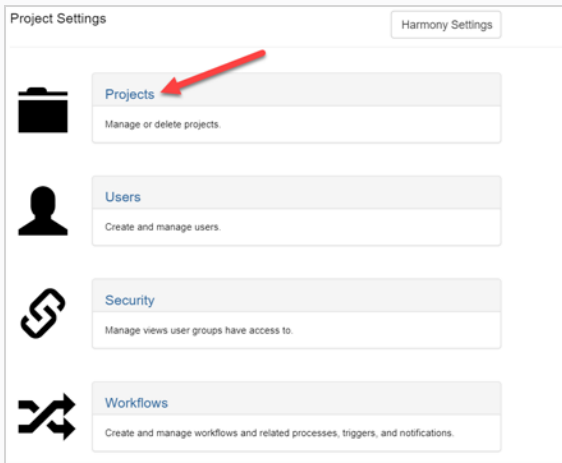
Creating a project is the first step to creating and housing environments, jobs and scenes.

How to create a project

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

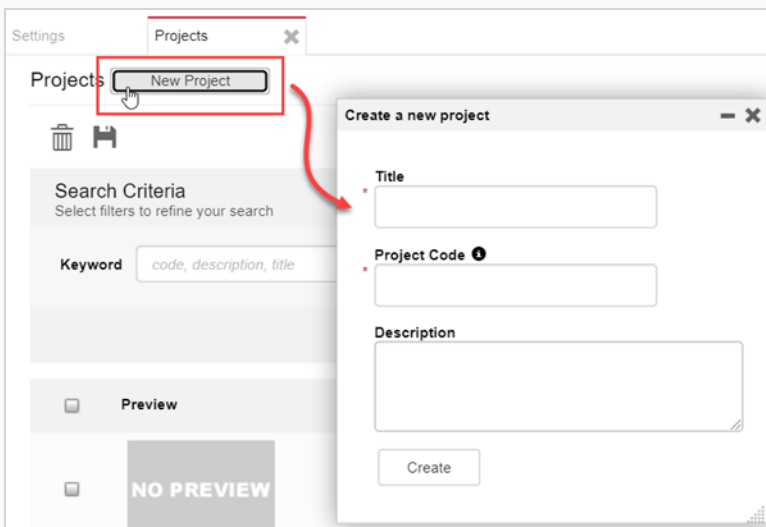


The Project Settings are displayed.



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.

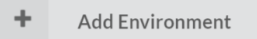
Creating Environments

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.

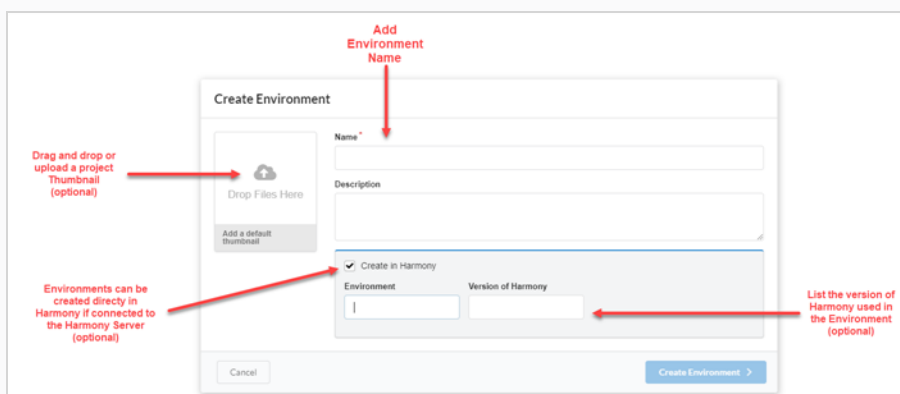
A new project does not have any environments. To start creating the structure of a project, environments must be manually created by a user with administrative privileges. A project can have as many environments as needed.

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  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 if 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

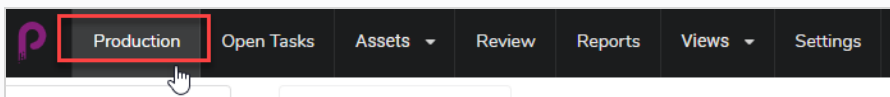
Jobs are a collection of scenes. Typically, jobs are used to separate the episodes or other segments of an animated series. Special jobs can also be created to store scenes containing character models and assets for a series.

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.

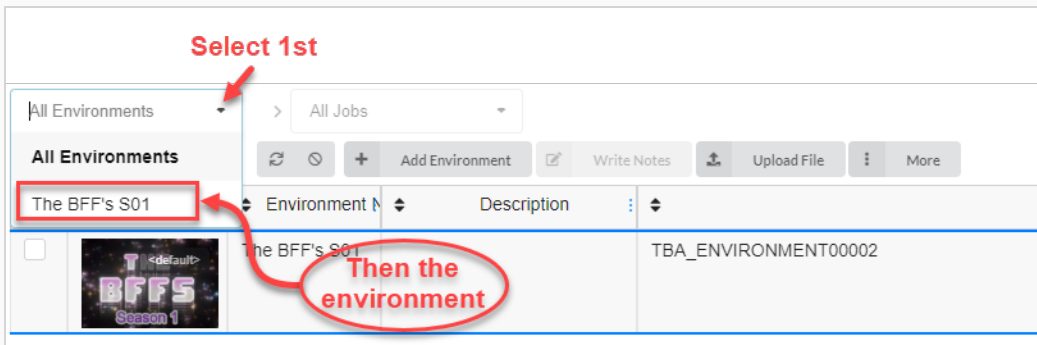
How to create a job

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

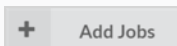


The Production tab opens.

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.

Create Job

Drop Files Here

Add a default thumbnail

Add a Thumbnail (optional)

Create number of Jobs (aka Episodes)

Number of jobs: 10

Start Date: 2020-08-04

Days between jobs: 5

Name: The BFF's Ep101 (Job Name)

Description:

Select Workflow types

Job Workflow: Episode

Scene Workflow: Basic

Optional: Create Harmony Scenes in either Standalone OR Server

Create in Harmony

Environment	Job	Version of Harmony
The_BFFs_S01	The_BFFs_Ep101	20

When READY press Create Job

Cancel

Create Job >

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.

Create Job >

Your job page will look something like this:

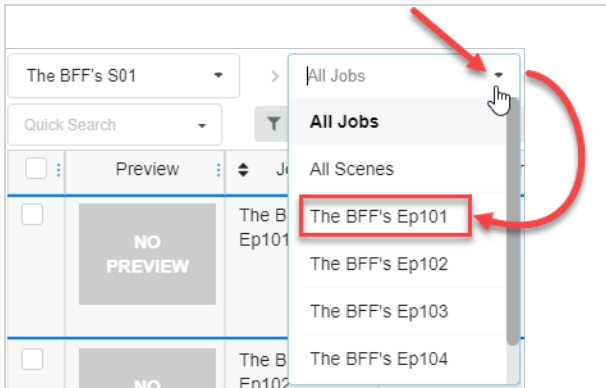
The BFF's 501		All Jobs				5 Items 0 selected			
Quick Search		Y	+	+	+	+	+		
Preview	Job Name	Description	Job Code	Start Date	Tasks Comp	Job Tasks	Workflow Code	End Date	Notes
	The BFF's Ep101		TBA_JOB00002	06/04/2020	Script 0%	Script 06/04-06/07 Storyboard 06/11-06/17 Production 06/18-06/24 Post-Production 06/25-06/31 Unassigned - Unassigned - Unassigned - Unassigned -	the_bff/episode	05/31/2020	Add a note...
	The BFF's Ep102		TBA_JOB00003	06/11/2020	Script 0%	Script 06/11-06/17 Storyboard 06/18-06/24 Production 06/25-06/31 Post-Production 06/31-06/31 Unassigned - Unassigned - Unassigned - Unassigned -	the_bff/episode	09/07/2020	Add a note...
	The BFF's Ep103		TBA_JOB00004	06/18/2020	Script 0%	Script 06/18-06/24 Storyboard 06/25-06/31 Production 06/31-06/31 Post-Production 06/31-06/31 Unassigned - Unassigned - Unassigned - Unassigned -	the_bff/episode	09/14/2020	Add a note...
	The BFF's Ep104		TBA_JOB00005	06/25/2020	Script 0%	Script 06/25-06/31 Storyboard 06/31-06/31 Production 06/31-06/31 Post-Production 06/31-06/31 Unassigned - Unassigned - Unassigned - Unassigned -	the_bff/episode	09/21/2020	Add a note...
	The BFF's Ep105		TBA_JOB00006	09/01/2020	Script 0%	Script 09/01-09/14 Storyboard 09/15-09/21 Production 09/22-09/28 Post-Production 09/29-09/29 Unassigned - Unassigned - Unassigned - Unassigned -	the_bff/episode	09/28/2020	Add a note...

Creating Scenes

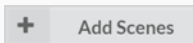
Once you've created an environment and jobs for your project, you can start to populate your job with scenes.

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.



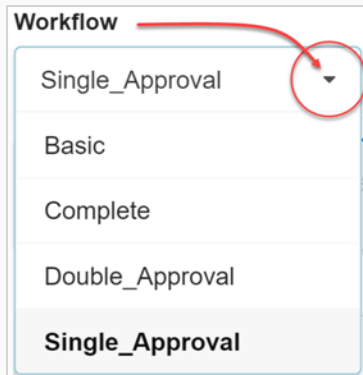
2. Once inside the job, click on the Add Scenes button.



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

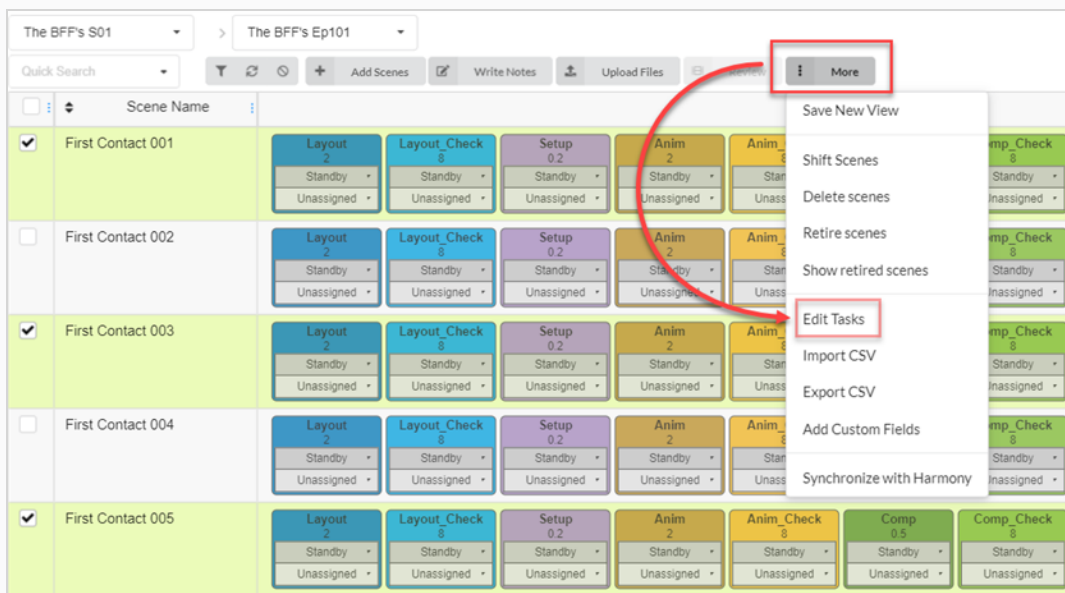
Once a task is created for a given scene or asset, it can easily be modified.

How to edit a task

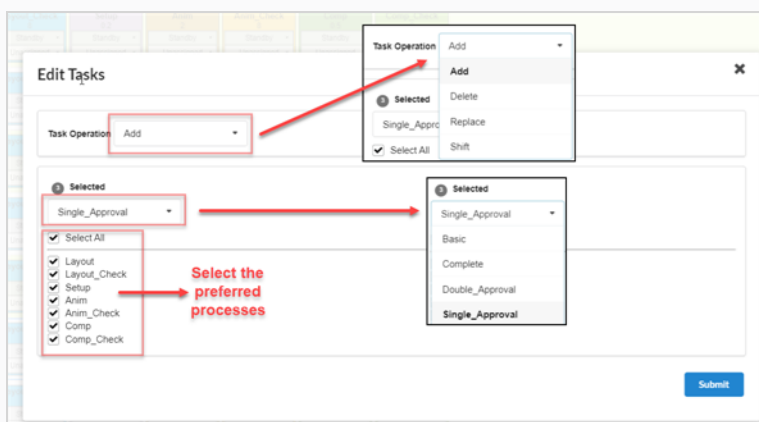
1. In the main menu, select either **Production** or **Asset > Manage**.
2. In the Environment, Jobs or Scene drop-downs, select an environment, scene or job or a combination.

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:

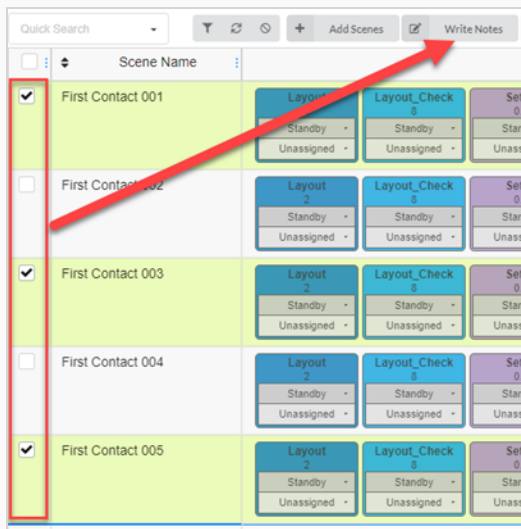
- **Add** - To add missing tasks to selection
 - **Delete** - To delete existing tasks from selection
 - **Replace** - To replace some or all tasks for the selection
 - **Shift**
6. In the Selected drop-down menu, change the Workflow type.
 7. In Processes list, check the tasks you wish to include in the Workflow.
 8. Click the **Submit** button.

Writing Notes

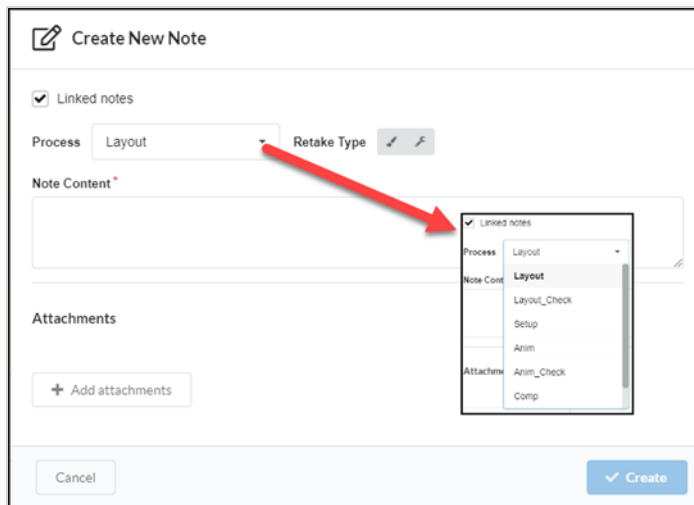
The Write Notes feature allows you to create notes on one or multiple scenes that have been selected.

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.



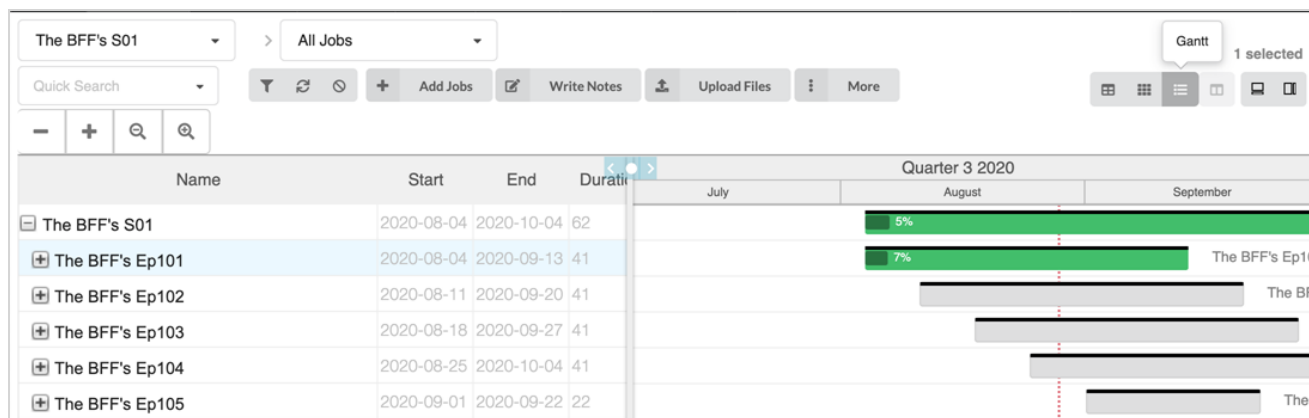
5. Check the Link notes option if you want changes in one note to automatically update in the other notes for all the assets you selected.

6. In the Process drop-down menu, select the task/process in the workflow 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.

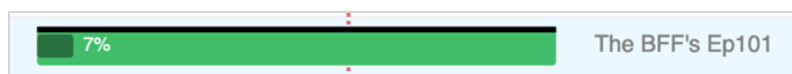
About Gantt Charts

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, its 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).

Shift jobs

1 Selected

Shift jobs by days

Cancel Accept

Scene Focus View

This section provides the details related to a scene (Status, Assignee, Notes, Associated Assets) so that one can focus on that given scene without being distracted by the information of other scenes, as may be the case when viewing multiple scenes in the production page.

How to access Scene Focus View

Do one of the following:

- Double click on a scene row on the Production Page.
- Select a Scene from the drop-down list in the navigation section.

In order to exit the scene focus view, select "All Scenes from Current Job" from the drop-down list.

The Scene Focus view is divided in multiple sections:

Option	Description
Navigation	It allows you to select a specific scene to focus. You can also exit the focus view, by selecting a Job/Episode in the second drop-down list.
Summary	This section displays the name of the scene and provides information on the

Option	Description
	<p>current process, its Status and Assignee. It also displays useful information such as the overall progress of the scene, the completion of the Assets associated with this scene, the current priority and the description.</p> <p>You can perform the following two actions here:</p> <ul style="list-style-type: none"> • Upload Files • Submit for Review
Preview	<p>The Preview of the latest snapshot is prominently displayed and can be played back.</p>
Tasks	<p>Below the Preview section, the Tasks section shows all the tasks related to the selected scene. It is possible, if you have the rights, to edit the status and assignee directly from here.</p>
Related Items	<p>This section is located at the bottom left. It will list any assets associated with the current scene.</p>
Notes	<p>This section is similar to the one you would find in the side panel of any Production Page. It will list all the Notes related to the current scene and allows you to enter new Notes.</p>
Details	<p>This section is similar to the one you would find in the side panel of any Production Page. It will list all the Details of the current scene and allows you to edit them.</p>

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.

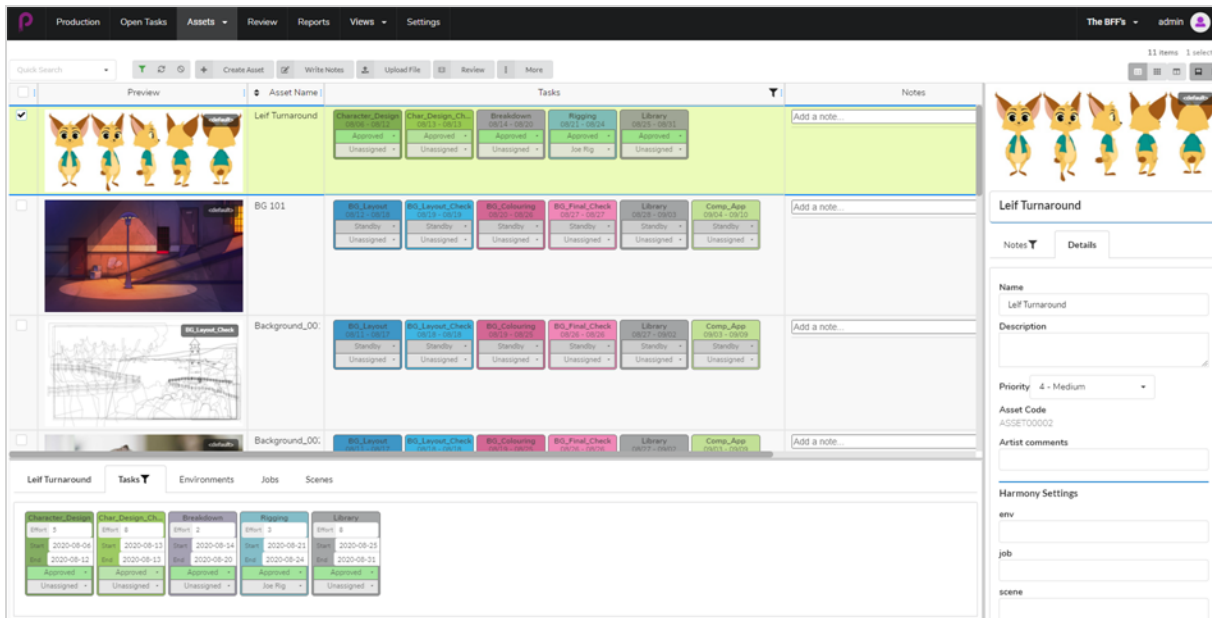
Assets can be sorted one of two ways:

- **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	Open Harmony column	N/A	N/A

	click this button to open the asset directly in Harmony.			
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

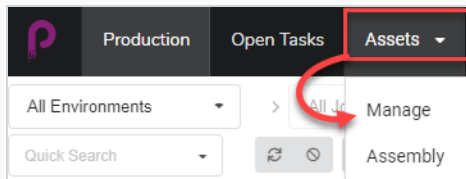
Creating Assets

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 create assets

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



The assets list opens.

 A screenshot of the assets list interface. It shows a table with columns for 'Asset Name', 'Tasks', 'Notes', and 'Completion'. Two assets are listed: 'Character Design 01' and 'BG 101'. The 'Tasks' column for each asset contains a grid of colored boxes representing different task stages, each with a status like 'Approved' or 'Unsigned'. The 'Completion' column shows a green circle with '100%' for both assets.

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

The Create Asset dialog box appears.

 A screenshot of the 'Create Asset' dialog box. It features a 'Drop Files Here' box on the left. The main form includes:

- Name**: A text input field.
- Description**: A text area.
- Type**: A dropdown menu with 'Select a type'.
- Category**: A dropdown menu with 'Select a category'.
- Workflow**: A dropdown menu with 'Select a workflow'.
- Tags**: A dropdown menu with 'Add tags'.
- Assembly**: A section with 'Environment' and 'Jobs' dropdown menus, both with 'Select an environment'.

 At the bottom, there are 'Cancel' and 'Add asset >' buttons.

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.

NOTE

It is possible to create multiple assets at once. Press enter after typing an asset name and continue entering assets name for all the assets you wish to create with the same parameters.

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.

The screenshot shows a form with two radio buttons at the top: 'Harmony scene asset' (checked) and 'Harmony Standalone'. Below are four input fields: 'Environment name', 'Job name', 'Scene name', and 'Version of Harmony'. The 'Harmony scene asset' checkbox is highlighted with a red box.

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 or even to an asset from a third-party software.

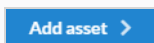
New fields appear where you can enter in the Workspace ID and Relative Path.

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).

NOTE

This field is mandatory.

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.



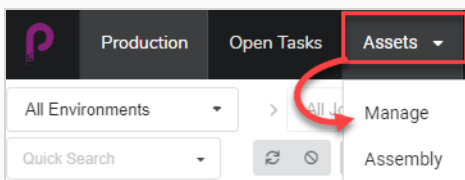
Your assets are now available in the asset list.

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 associated with specific environments, jobs or 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.

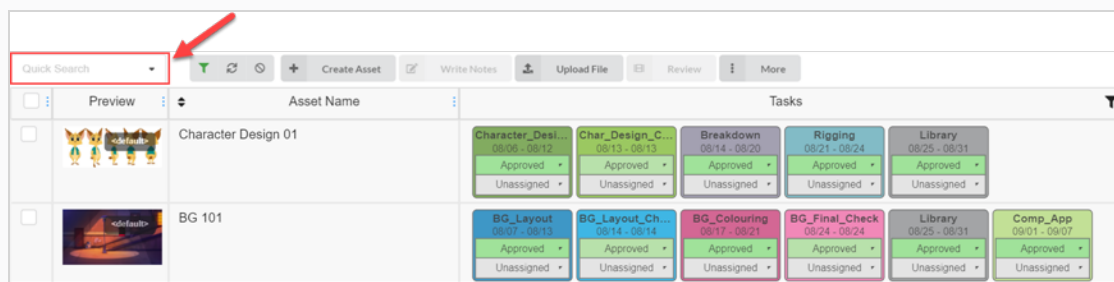
TIP

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 [Creating Assets](#). These tags are usually descriptive of the asset and can now come in handy when doing a search.

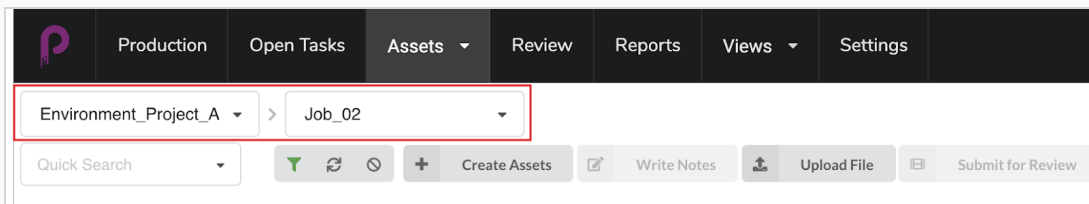


Assets containing your search term appear.

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.

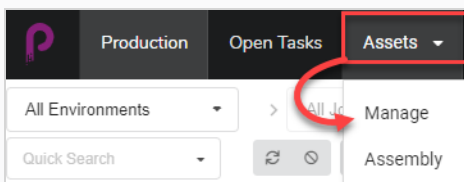
TIP

You can restrict your search to assets associated with specific environments or jobs by selecting such restrictions from the navigation drop-downs.



How to filter assets by their tasks, statuses and assignees

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




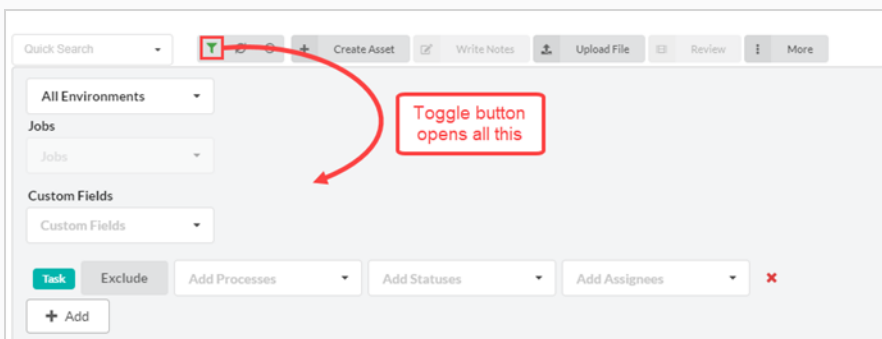
The assets list opens.

The screenshot shows a table with columns for "Preview", "Asset Name", and "Tasks". The "Tasks" column contains a grid of task cards for each asset. The assets listed are:

- Leaf Turnaround
- BO 101
- Background_001
- Background_002

Each task card shows a task name, a date range, and a status (e.g., "Approved", "Unassigned", "Standby").

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



The search panel appears.

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

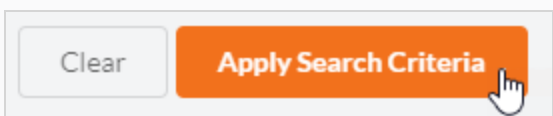
The Jobs drop-down menu is enabled.

- 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.


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

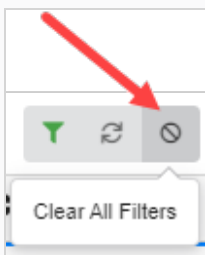


The assets that match your search appear in the asset list.

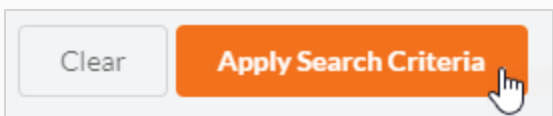
How to clear search terms and filters

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



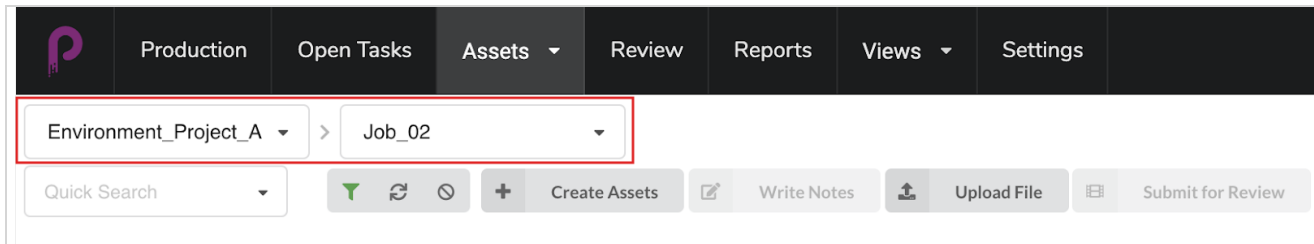
- At the bottom of the Search Panel, click on the **Clear** button.



All of the assets within the job are displayed in the asset list again.

Navigating Assets

The navigating drop downs (top left of the Asset Manage page) will let you focus on the assets associated with a specific environment or job. These associations are done either at creation time or through the Asset Assembly page. Select the desired environment and job to restrict the display to these assets.



NOTE

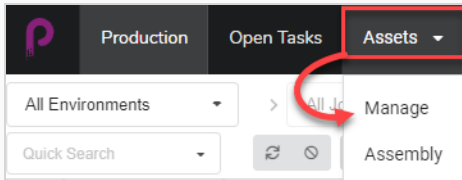
If you leave the environment to the default "All Environments", no restriction will apply.

Editing an Asset


Once an asset has been created, you can edit its description, workflow, and other information at any time.

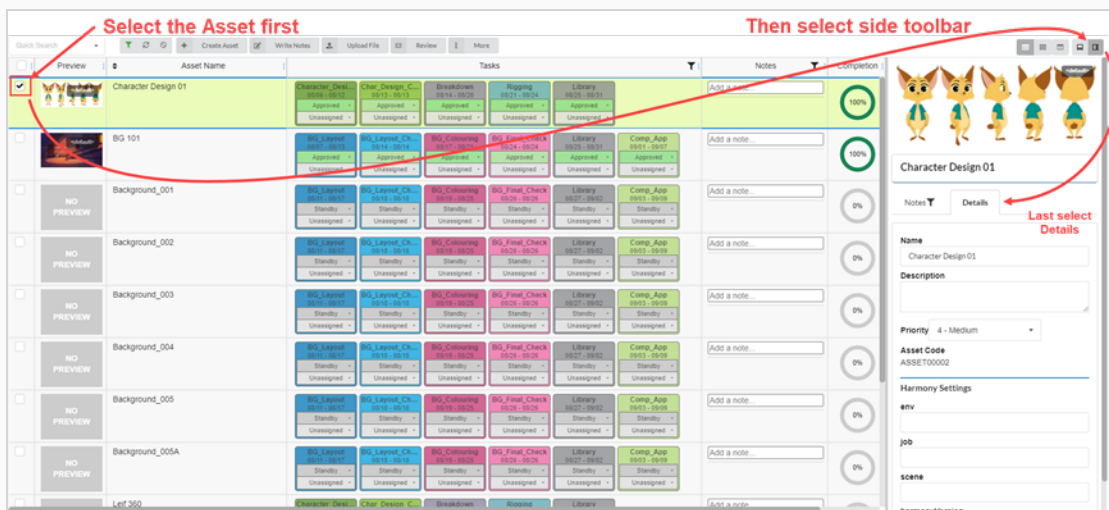
How to edit the name and description of an asset

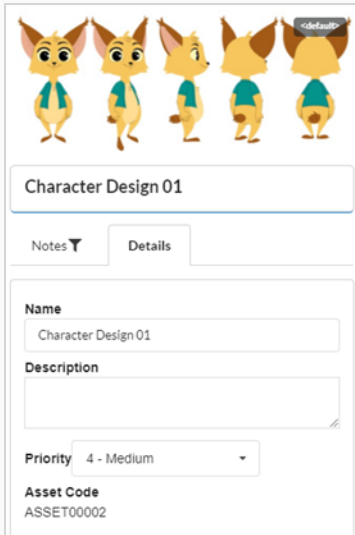
1. In the top menu, click **Assets > Manage**.



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.





Character Design 01

Notes **T** Details

Name
Character Design 01

Description

Priority 4 - Medium

Asset Code
ASSET00002

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

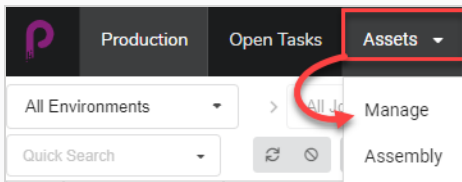
Assets can be permanently deleted.

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**.

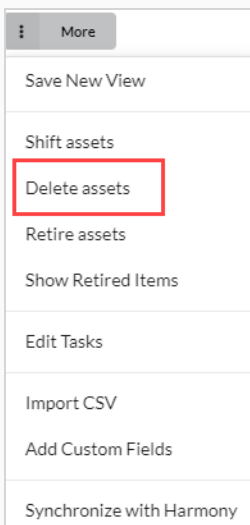


The Asset list opens.

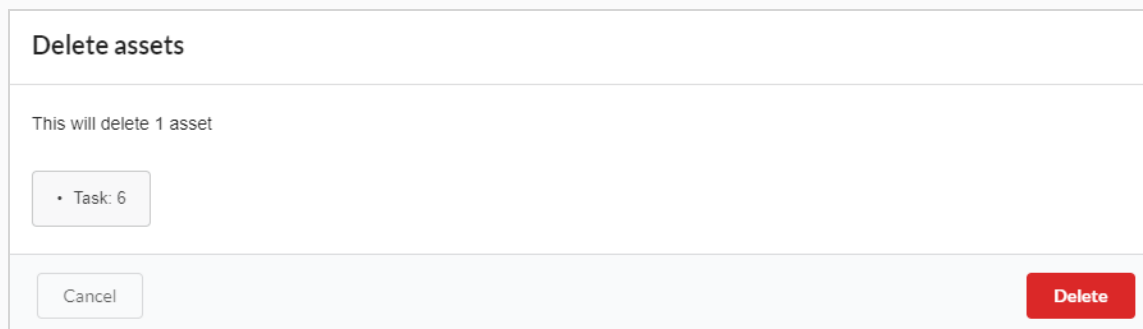
2. In the Asset list, enable the checkbox on the far left column of the item you wish to delete.

Preview	Asset Name	Tasks					
<input type="checkbox"/>	Leif Turnaround	Character_Desi... 08/08 - 08/12 Approved - Unassigned -	Char_Design_C... 08/13 - 08/13 Approved - Unassigned -	Breakdown 08/14 - 08/20 Approved - Unassigned -	Rigging 08/21 - 08/24 Approved - Unassigned -	Library 08/25 - 08/31 Approved - Unassigned -	
<input type="checkbox"/>	BG 101	BG_Layout 08/12 - 08/18 Standby - Unassigned -	BG_Layout_Ch... 08/18 - 08/18 Standby - Unassigned -	BG_Colouring 08/28 - 08/28 Standby - Unassigned -	BG_Final_Check 08/27 - 08/27 Standby - Unassigned -	Library 08/28 - 09/03 Standby - Unassigned -	Comp_App 09/04 - 09/10 Standby - Unassigned -
<input checked="" type="checkbox"/>	Background_001	BG_Layout 08/11 - 08/17 Standby - Unassigned -	BG_Layout_Ch... 08/18 - 08/18 Standby - Unassigned -	BG_Colouring 08/19 - 08/25 Standby - Unassigned -	BG_Final_Check 08/26 - 08/26 Standby - Unassigned -	Library 08/27 - 09/02 Standby - Unassigned -	Comp_App 09/03 - 09/09 Standby - Unassigned -

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



The Delete Assets dialog box opens.



The screenshot shows a dialog box titled "Delete assets". Below the title bar, it states "This will delete 1 asset". Underneath, there is a list containing one item: "• Task: 6". At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Delete" on the right. The "Delete" button is highlighted in red.

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 Assets > Manage tab or the Production tab.

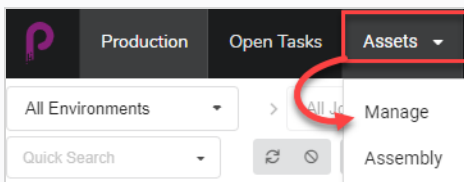
The following image types are supported for preview images: PNG, JPEG, GIF, BMP, TGA, TIFF, PSD, AI and PDF.

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**.

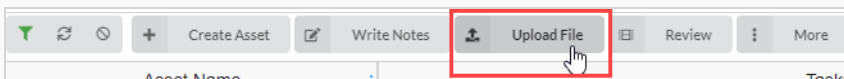


The assets list opens.

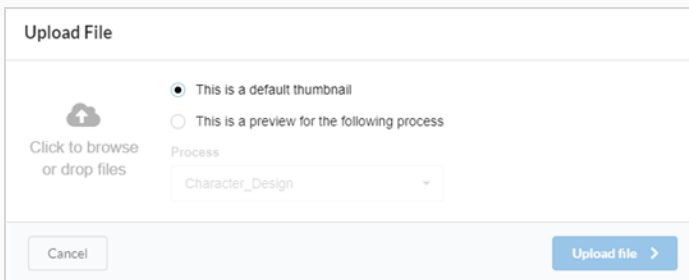
OR

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.

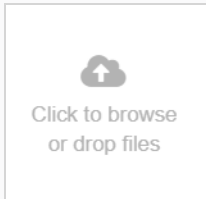


5. Select one of the following options:
 - **This is a default thumbnail** to upload an image or movie clip (MP4 or MOV) that will be a visual reference for all the tasks in the selected row.

- **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.



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

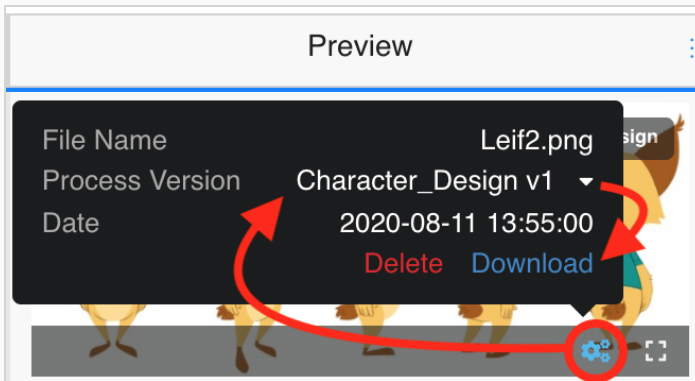
Scene preview movie clips can be downloaded for viewing outside of Producer web interface.

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.

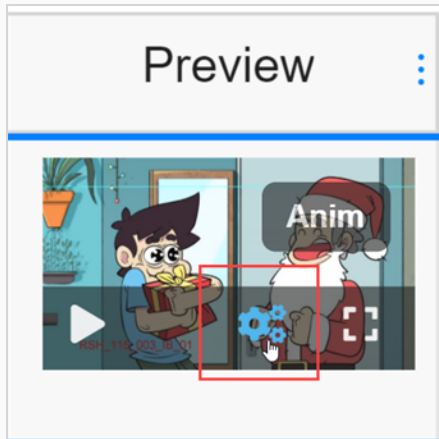
The movie file is downloaded to your computer.

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.

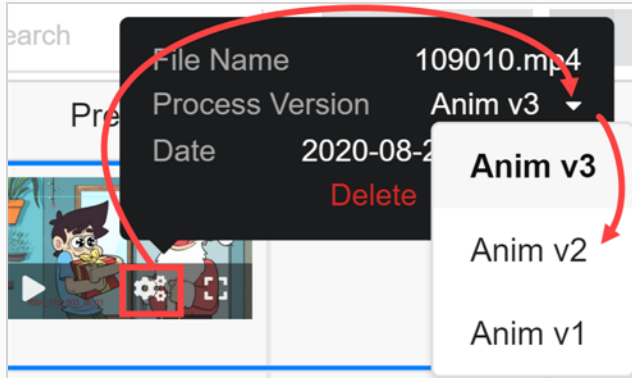
How to view different versions of Preview images and movie clips

1. Hover your mouse over a Preview image.



A menu bar appears.

2. Click on the gear icon.



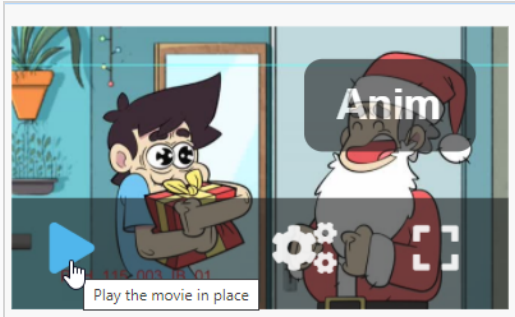
An information and dialog box appears.


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.



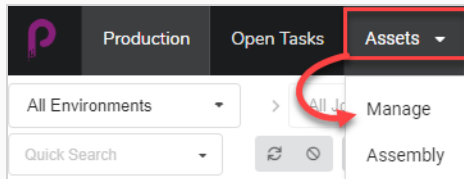
5. If you would like to see a full-size version of the image or movie clip, click on the Open the image in a new tab  icon.

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.

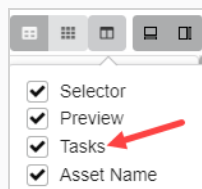
How to replace asset tasks


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



The asset list opens.

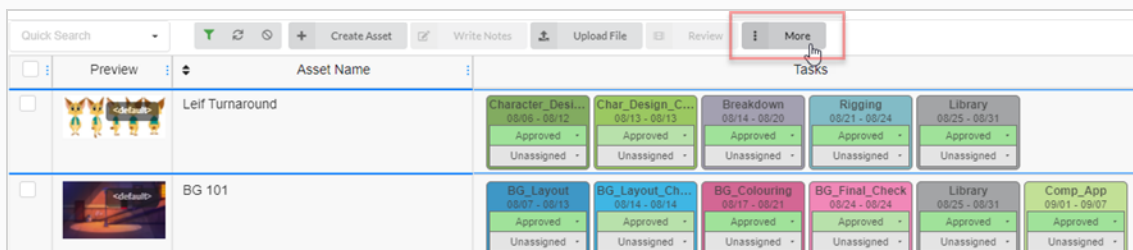
2. Ensure the Tasks are visible by doing one of the following:
 - In the toolbar in the top-right corner, click on the Manage Columns  icon, and ensure the checkbox next to the Tasks column option is checked.



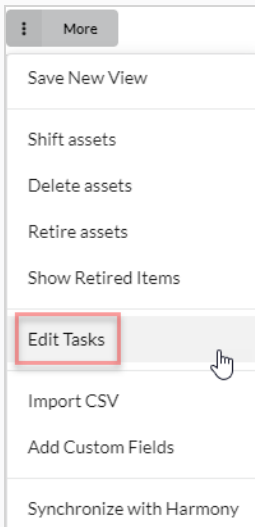
- Select the asset in the asset list and, in the toolbar in the top-right corner, ensure the Toggle Bottom Panel  button is clicked and the bottom panel is visible. Then, in the bottom panel, select the **Tasks** tab.
3. Click the checkbox of each asset whose workflow you wish to change.



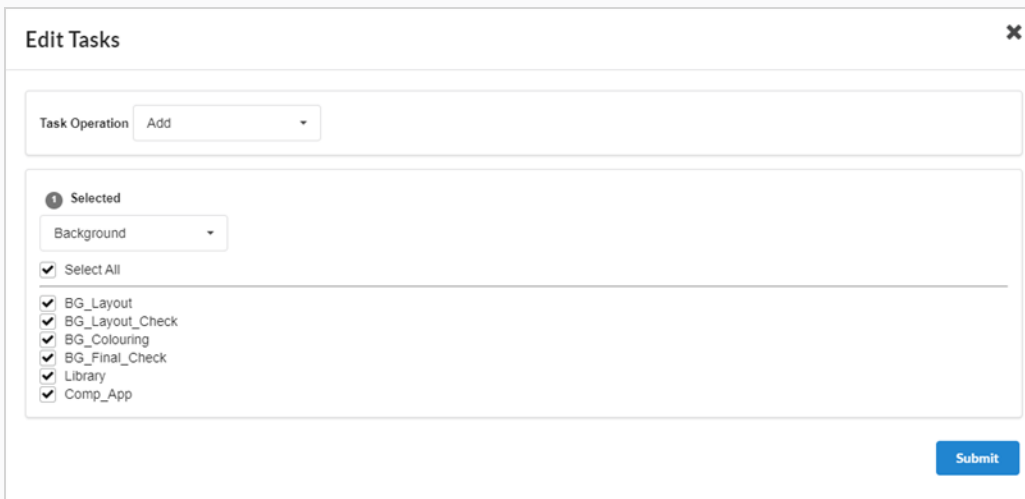
4. In the toolbar above the asset list, click on the **More** button.



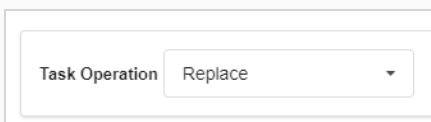
5. From the More drop-down menu, select **Edit Tasks**.



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.

Task Operation: Replace

Current Workflows
All current tasks will be deleted.

New Workflows

Selected: Background

Background
Character
Prop

BG_Final_Check
 Library
 Comp_App

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.

Selected: Background

Select All
 BG_Layout
 BG_Layout_Check
 BG_Colouring
 BG_Final_Check
 Library
 Comp_App

9. Click the Confirm button.

Confirm

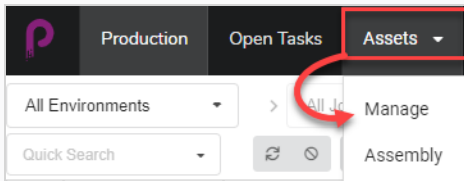
A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

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**.

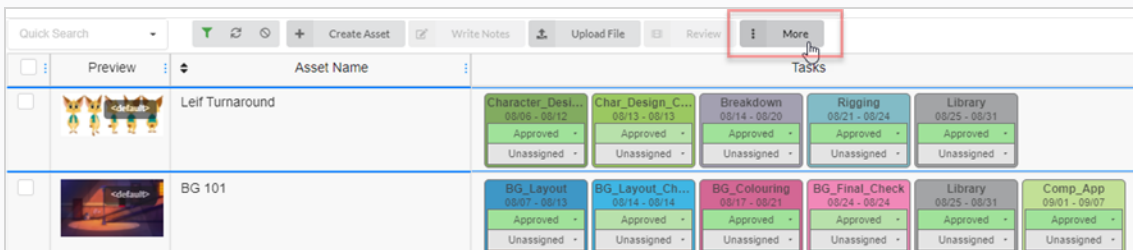


The asset list opens.

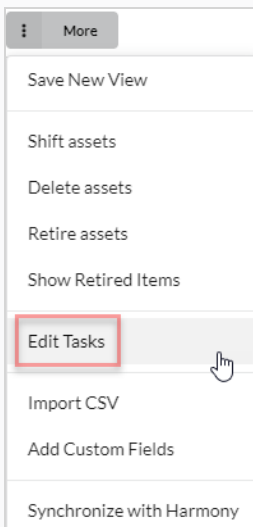
2. Click the checkbox of each asset whose workflow you wish to change.



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.

Edit Tasks [X]

Task Operation: Add

Selected: Background

Select All

- BG_Layout
- BG_Layout_Check
- BG_Colouring
- BG_Final_Check
- Library
- Comp_App

Submit

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

Edit Tasks [X]

Task Operation: Add

Selected: Background

Select All

- BG_Layout
- BG_Layout_Check
- BG_Colouring
- BG_Final_Check
- Library
- Comp_App

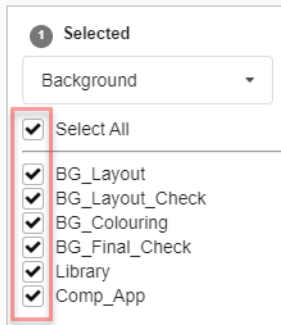
Submit

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.



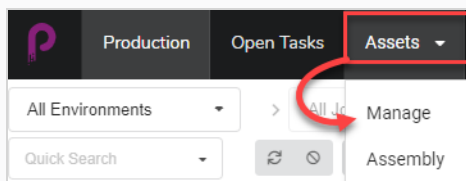
A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

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**.

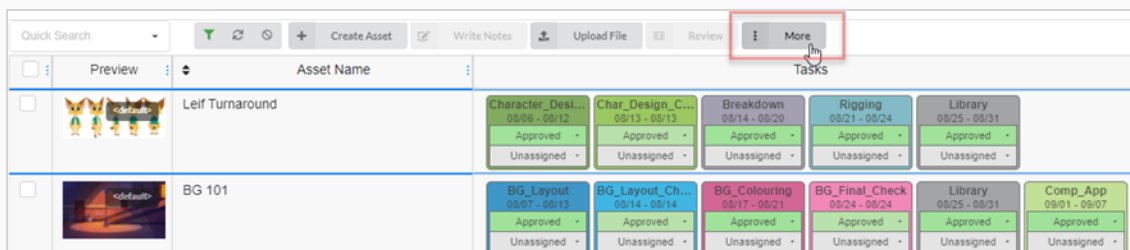


The asset list opens.

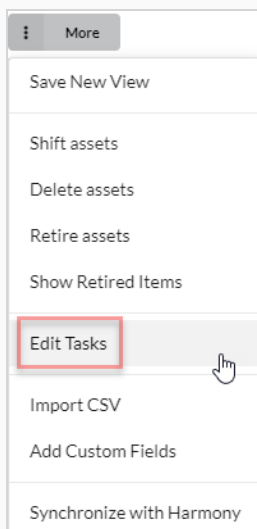
2. Click the checkbox of each asset whose workflow you wish to change.



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.

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

The screenshot shows a dialog box titled "Edit Tasks" with a close button (X) in the top right corner. At the top, there is a "Task Operation" dropdown menu currently set to "Delete". Below this is a section titled "Selected" with a sub-section "Background". Under "Background", there is a "Select All" checkbox which is checked. Below that is a list of tasks, each with a checked checkbox: "BG_Layout", "BG_Layout_Check", "BG_Colouring", "BG_Final_Check", "Library", and "Comp_App". A blue "Confirm" button is located in the bottom right corner of the dialog box.

- 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.
- 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

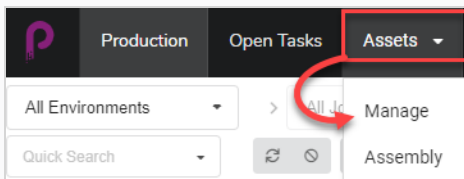
You can add back the tasks that were removed from an assets workflow—see [Adding Tasks](#).

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**.

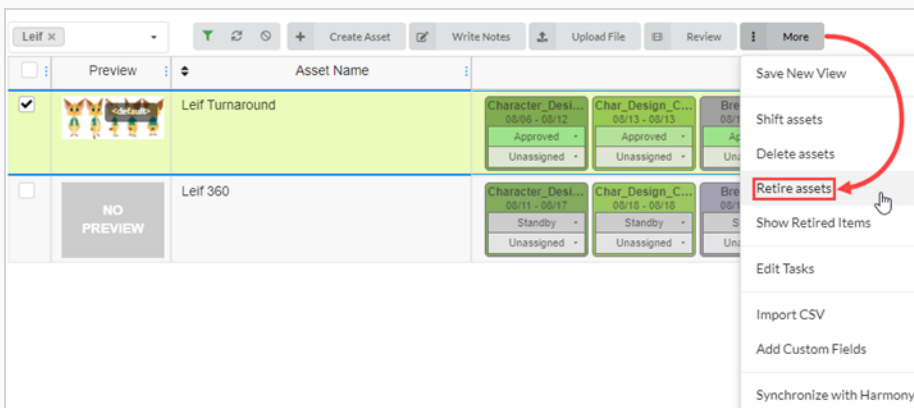


The Asset list opens.

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.

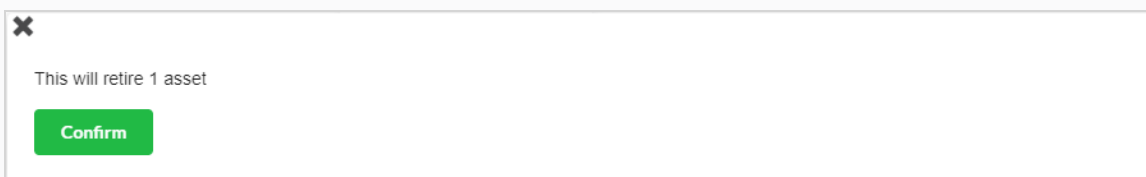


4. In the toolbar above the asset list, select **More > Retire Assets**.



The Confirm dialog box opens.

5. Select **Confirm**.



The retired assets is now hidden from view.

Viewing Retired Assets

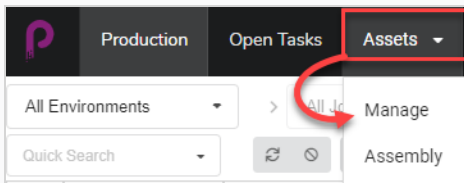
Assets that have been retired are hidden from the Production page, but can be viewed if needed.

NOTE

To retire assets, see [Retiring Assets](#).

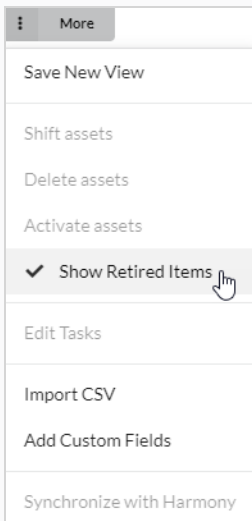
How to view retired assets

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.

Preview	Asset Name	Tasks				
	Leif Turnaround	Character_Desi... 08/08 - 08/12 Approved - Unassigned -	Char_Design_C... 08/13 - 08/15 Approved - Unassigned -	Breakdown 08/14 - 08/20 Approved - Unassigned -	Rigging 08/21 - 08/24 Approved - Unassigned -	Library 08/25 - 08/31 Approved - Unassigned -
NO PREVIEW	Leif 360	Character_Desi... 08/11 - 08/17 Standby - Unassigned -	Char_Design_C... 08/18 - 08/18 Standby - Unassigned -	Breakdown 08/19 - 08/25 Standby - Unassigned -	Rigging 08/26 - 08/27 Standby - Unassigned -	Library 08/28 - 08/31 Standby - Unassigned -

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

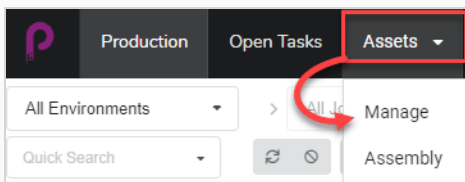
Assets that have been retired and hidden from view can be restored so they will appear in the asset list. This is referred to as activating assets.

NOTE

To retire assets, see [Retiring Assets](#).

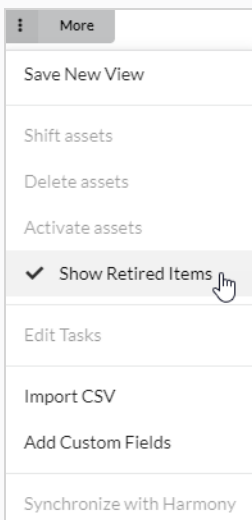
How to restore retired assets

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



The Asset list opens.

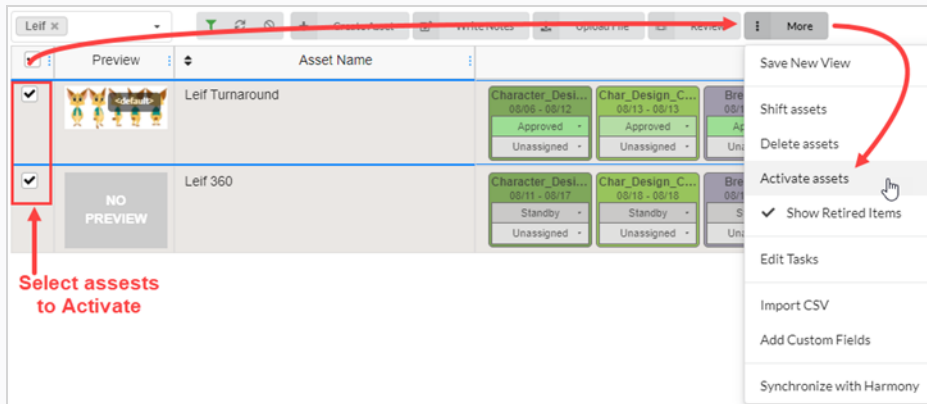
2. In the toolbar above the asset list, select **More > Show Retired Items**.



Retired items appear.

	Preview	Asset Name	Tasks				
<input type="checkbox"/>		Leif Turnaround	Character_Desi... 08/06 - 08/12 Approved - Unassigned -	Char_Design_C... 08/13 - 08/13 Approved - Unassigned -	Breakdown 08/14 - 08/20 Approved - Unassigned -	Rigging 08/21 - 08/24 Approved - Unassigned -	Library 08/25 - 08/31 Approved - Unassigned -
<input type="checkbox"/>	NO PREVIEW	Leif 360	Character_Desi... 08/11 - 08/17 Standby - Unassigned -	Char_Design_C... 08/18 - 08/18 Standby - Unassigned -	Breakdown 08/19 - 08/25 Standby - Unassigned -	Rigging 08/26 - 08/27 Standby - Unassigned -	Library 08/28 - 08/31 Standby - Unassigned -

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 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.

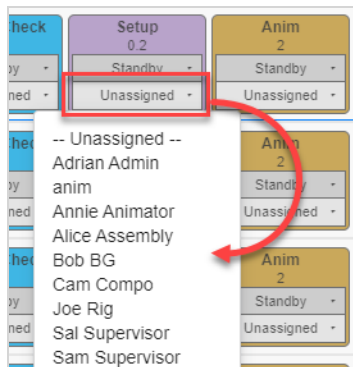
Tasks are usually created automatically because workflows have a default setting to automatically create tasks. When you create an item, such as a scene or an asset, and you select a workflow using the auto-create setting, all the processes of this workflow will be converted into actual tasks for this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

Tasks			
Layout 2	Setup 0.2	Anim 2	Comp 0.5
Standby	Standby	Revise	Standby
Unassigned	anim	Annie Animator	Unassigned

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.

The screenshot shows a software interface for managing production tasks. At the top, there are navigation tabs: Production, Open Tasks, Assets, Review, Reports, Views, and Settings. Below this, the current project is identified as 'The BFF's S01' and the specific episode as 'The BFF's Ep101'. A search bar and several action buttons (Add Scenes, Write Notes, Upload Files, Review, More) are visible.

The main area is a grid of tasks. The first column contains checkboxes for selecting scenes. The second column shows scene thumbnails and names (BFFs_Ep101 to BFFs_Ep108). The subsequent columns represent different task stages: Layout, Setup, Anim, and Comp. Each task cell contains a dropdown menu for assignees. A dropdown menu is currently open for the 'Anim' task of BFFs_Ep101, showing a list of assignees: -- Unassigned --, Adrian Admin anim, Annie Animator (highlighted with a red box), Bob BG, Cam Compo, Dan Director, Joe Rig, Sal Supervisor, Toon Boom Admin, and Toon Boom Producer.

Two callouts provide additional information: a red bubble on the left says 'Select scenes to assign', and a black box on the right states 'With Multiple scenes selected, just changing one assignee will change them all for that task.'

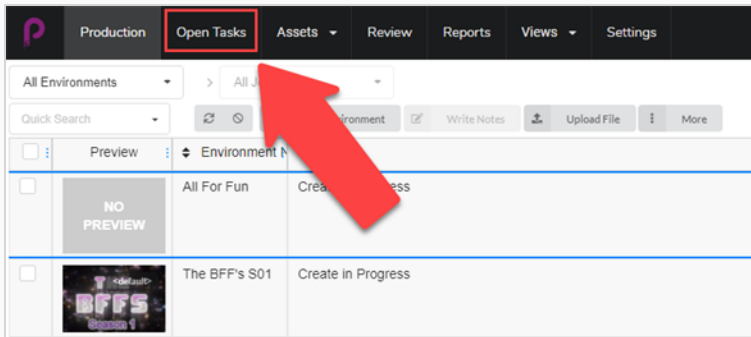
Scene Name	Layout	Setup	Anim	Comp
BFFs_Ep101	Layout 2 Standby	Setup 0.2 Standby	Anim 2 Revise Unassigned	Comp 0.5 Standby
BFFs_Ep102	Layout 2 Standby	Setup 0.2 Standby	-- Unassigned -- Adrian Admin anim Annie Animator Bob BG Cam Compo Dan Director Joe Rig Sal Supervisor Toon Boom Admin Toon Boom Producer	Comp 0.5 Pending
BFFs_Ep104	Layout 2 Standby	Setup 0.2 Standby	Anim 2 Revise Unassigned	Comp 0.5 Standby
BFFs_Ep105	Layout 2 Standby	Setup 0.2 Standby	Anim 2 Unassigned	Comp 0.5 Standby
BFFs_Ep106	Layout 2 Standby	Setup 0.2 Standby	Anim 2 Unassigned	Comp 0.5 Standby
BFFs_Ep107	Layout 2 Standby	Setup 0.2 Standby	Anim 2 Pending Unassigned	Comp 0.5 Standby
BFFs_Ep108	Layout 2 Standby	Setup 0.2 Pending	Anim 2 Standby	Comp 0.5 Standby

Checking Open Tasks for Work and Notes

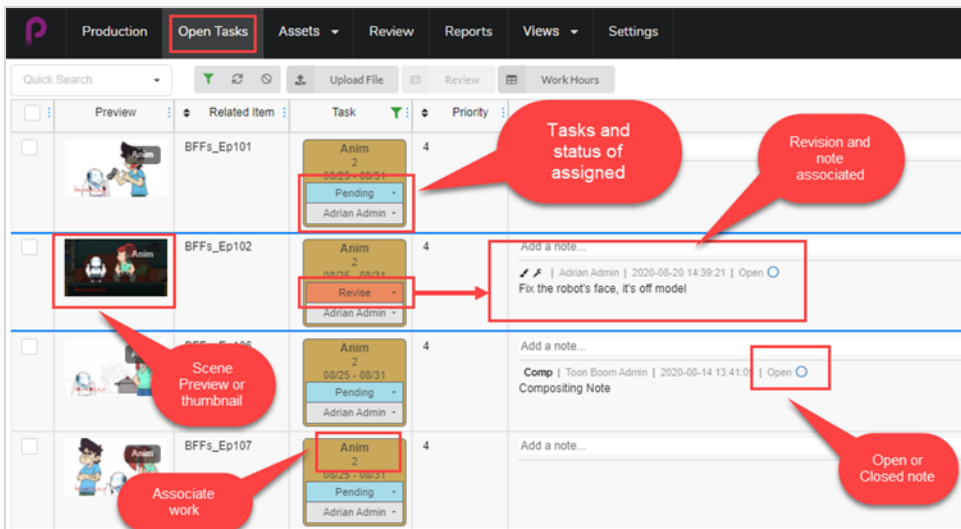
In Producer, every user receives their own unique login credentials. The individual users will have a predetermined limit of access to Producer depending on their duties within the animation pipeline. Every user will have the ability to check for Tasks and Notes that have been specifically assigned to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

The screenshot displays a software interface for managing tasks. At the top, there are navigation tabs: Production, Open Tasks, Assets, Review, Reports, Views, and Settings. Below these, there are filters for 'The BFF's S01' and 'The BFF's Ep101'. A search bar and several action buttons (Add Scenes, Write Notes, Upload Files, Review, More) are visible. The main area is a table with columns for 'Preview', 'Tasks', and 'Harmony Status'. The 'Tasks' column is divided into sub-columns for 'Layout', 'Setup', 'Anim', and 'Comp'. Each cell in the 'Tasks' column contains a task name, a status dropdown menu, and an assigned user. A red box labeled 'Drop Down Menu' points to the status dropdown in the 'Anim' column of the second row. A blue arrow labeled 'Status Choices' points to the dropdown menu in the 'Layout' column of the fourth row. The dropdown menu is open, showing a list of status options: Standby, Pending, Need Assistance, In Progress, To Validate, ✓ Revise, and Approved.

Preview	Layout	Setup	Anim	Comp	Harmony Status
<input type="checkbox"/>	Layout 2 Standby Unassigned	Setup 0.2 Standby anim	Anim 2 Revise Annie Animator	Comp 0.5 Standby Unassigned	N/A
<input type="checkbox"/>	Layout 3 Standby Unassigned	Setup 0.2 Standby Alice Assembly	Anim 2 Approved Annie Animator	Comp 0.5 Pending Unassigned	N/A
<input type="checkbox"/>	Layout 2 Standby Unassigned	Setup 0.2 Standby Alice Assembly	Anim 2 Revise Unassigned	Comp Standby Unassigned	N/A
<input type="checkbox"/>	Layout Standby Unassigned	Setup Standby Unassigned	Anim Standby Unassigned	Comp 0.5 Standby Unassigned	N/A

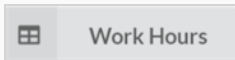
Logging Work Hours

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.

The screenshot shows the 'Work Hours' window. At the top, there is a date range selector (8/16/2020 - 8/22/2020) with a callout 'Select to view calendar'. To the right is a search bar with a callout 'Enter your search'. Further right is a 'Hide Approved' checkbox with a callout 'Show/Hide Approved Scenes'. Below this is a table with columns for 'Created For', 'Process', 'Logged', and days of the week (16 SU, 17 MO, 18 TU, 19 WE, 20 TH, 21 FR, 22 SA). The table contains four rows of tasks, each with a 'Logged' value and a cell for each day. A callout 'Manually enter you work hours for each task on the corresponding date' points to the '20 TH' column. A callout 'All your tasks' points to the 'Total' row. At the bottom left is a 'Cancel' button and at the bottom right is a 'Done' button.

Created For	Process	Logged	16 SU	17 MO	18 TU	19 WE	20 TH	21 FR	22 SA
The BFF's S01 / The BFF's Ep101 / BFFs_Ep101 (Scene)	Anim	5					5		
The BFF's S01 / The BFF's Ep101 / BFFs_Ep102 (Scene)	Anim	0	0				0		
The BFF's S01 / The BFF's Ep101 / BFFs_Ep106 (Scene)	Anim	0							
The BFF's S01 / The BFF's Ep101 / BFFs_Ep107 (Scene)	Anim	0							
Total		5	0	0	0	0	5	0	0

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

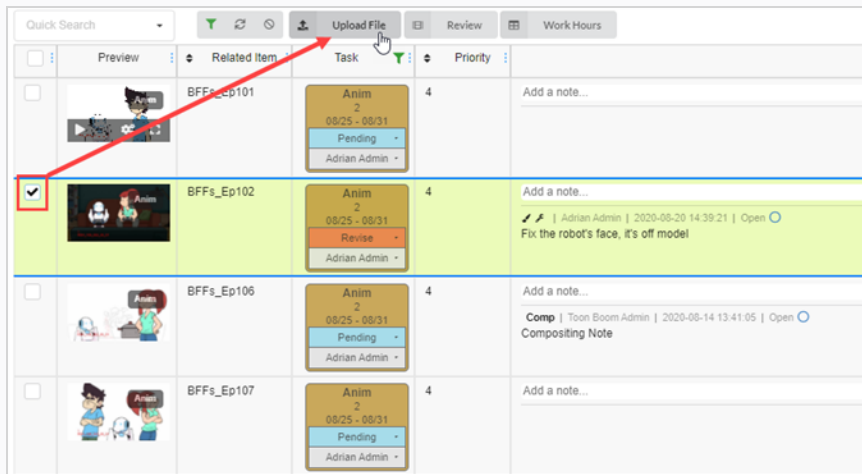
Uploading and Updating Snapshots

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

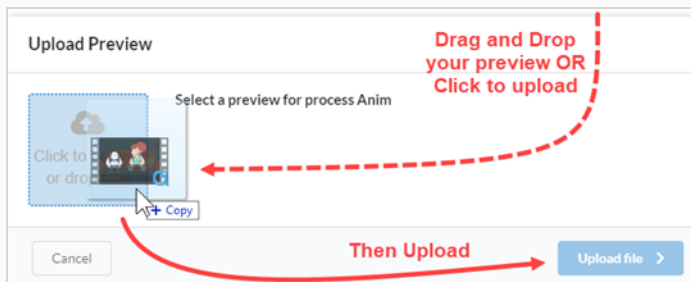
If Producer is integrated with Harmony, you can push the asset snapshot automatically from Harmony using a script.

How to upload a snapshot manually

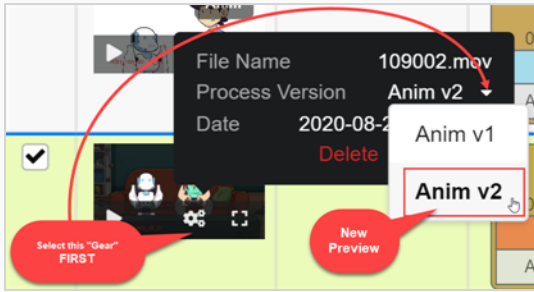
1. In Open Tasks, check the box on the far left for the scene(s) you wish to upload a image or video.
2. Select **Upload File**.



The Upload Preview window opens.

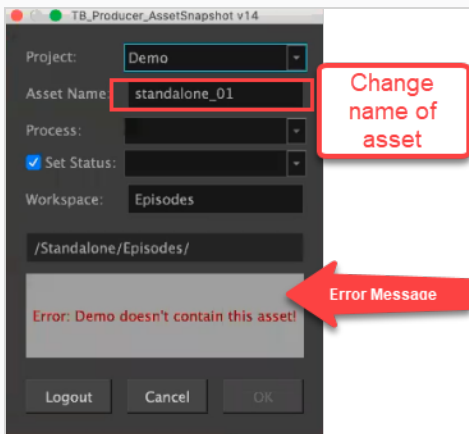


3. In the Upload Preview window, you can either drag and drop your new preview or click and upload it.
4. Select **Upload**.
5. In the Image area, select the Gear icon that appears when you hover your mouse over the window.
A new window opens.
6. Here you can view the old preview and the new one. Producer automatically makes the latest upload the default preview.



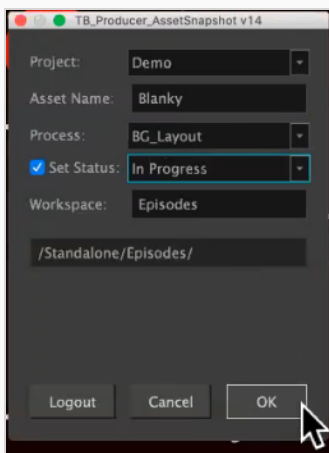
How to upload an Asset snapshot from a Harmony scene

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.

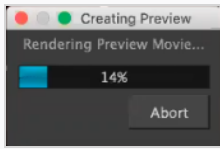


Harmony then communicates with Producer to recognize the Process you have in place.

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

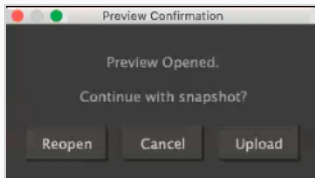


A new window will open showing the progress in Rendering Preview.

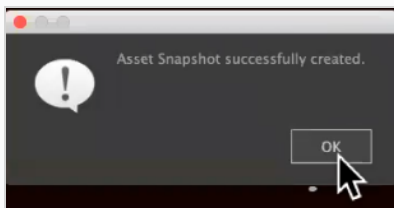


The Preview Confirmation dialog box opens.

5. Select **Upload**.

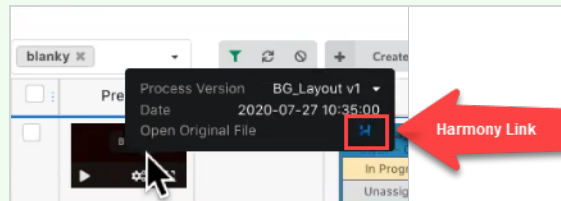


A confirmation window opens.



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.

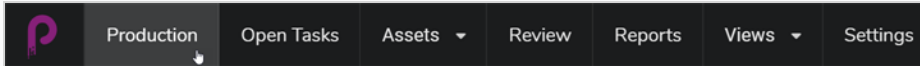


Verifying a User's Workload

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

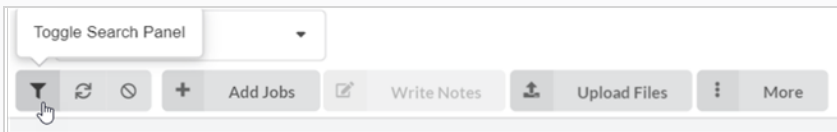
How to filter the production table

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

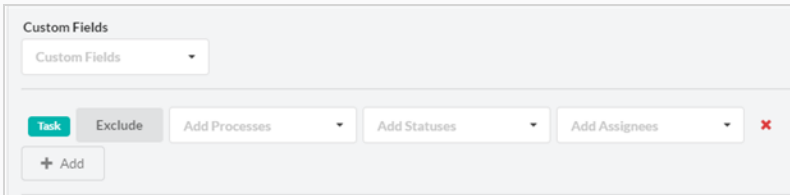


The Production page opens.

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.



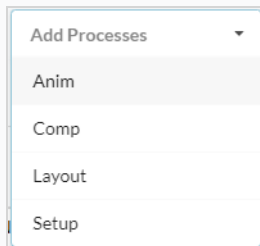
The Custom Fields window opens.



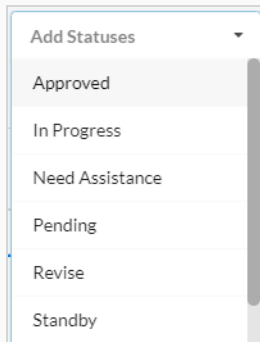
4. Click the Add + option to add more custom fields as well as use the existing fields to Exclude any of the selections.



- In the Add Processes menu, depending on the workflow you selected you get a drop down window similar to this:



- In the Add Statuses, 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.

Apply Search Criteria

Custom Fields
Custom Fields

Task Exclude Anim X Standby X Annie Animator X X

+ Add

Process Statues Assignee

Scene Name	Job Code	Preview	Layout	Setup	Anim	Comp
BFFs_Ep101	TBA_JOB00002		Layout 2 Standby - Unassigned -	Setup 0.2 Standby - Unassigned -	Anim 2 Standby - Annie Animator -	Comp 0.5 Standby - Unassigned -
BFFs_Ep102	TBA_JOB00002		Layout 2 Standby - Unassigned -	Setup 0.2 Standby - Unassigned -	Anim 2 Standby - Annie Animator -	Comp 0.5 Standby - Unassigned -
BFFs_Ep106	TBA_JOB00002		Layout 2 Standby - Unassigned -	Setup 0.2 Standby - Alice Assembly -	Anim 2 Standby - Annie Animator -	Comp 0.5 Standby - Unassigned -
BFFs_Ep107	TBA_JOB00002		Layout 2 Standby - Unassigned -	Setup 0.2 Standby - Alice Assembly -	Anim 2 Standby - Annie Animator -	Comp 0.5 Standby - Unassigned -

Search Results

NOTE

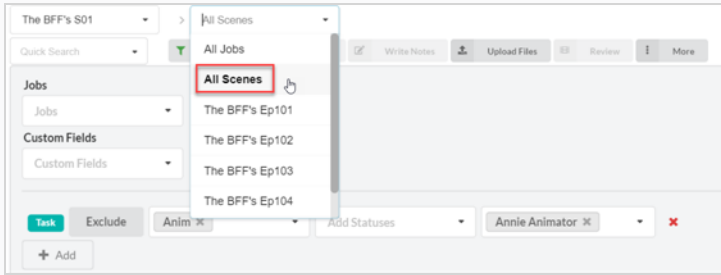
There is no limit to the amount of filters you can Add or Exclude from your search criteria.

Task Exclude Anim X Layout X In Progress X Standby X Adrian Admin X Cam Compo X Alice Assembly X X

Task Exclude Layout X Revise X Toon Boom Admin X X

+ Add

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

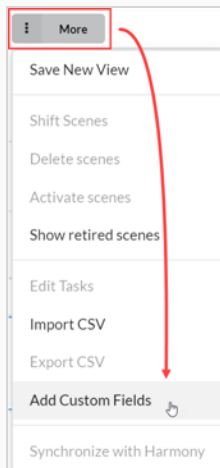


Creating Custom Fields

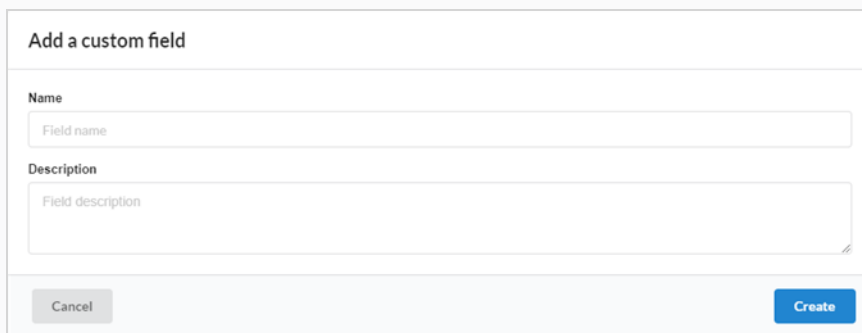
Custom Fields are fields or columns that can be added by user profile to match something they want to track that Producer isn't tracking by default, ie: Difficulty of a scene.

How to create custom fields

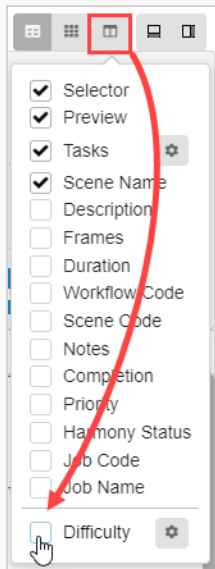
1. To add a custom field click on the More tab and select Add Custom Fields.



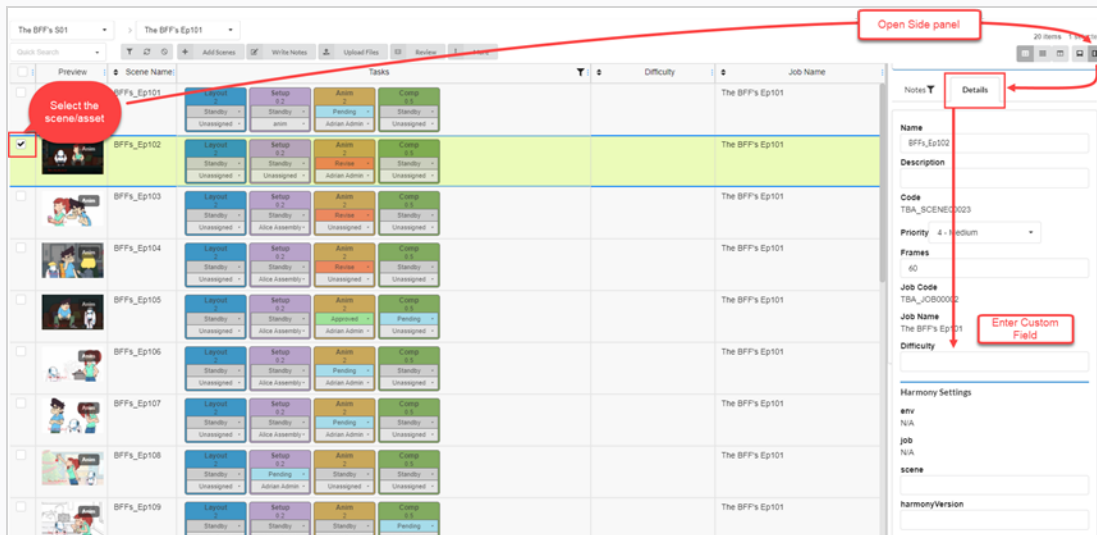
The Add a Custom Field window opens.

A screenshot of a dialog box titled 'Add a custom field'. It contains two text input fields: 'Name' with a placeholder 'Field name' and 'Description' with a placeholder 'Field description'. At the bottom, there are two buttons: 'Cancel' and 'Create'.

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

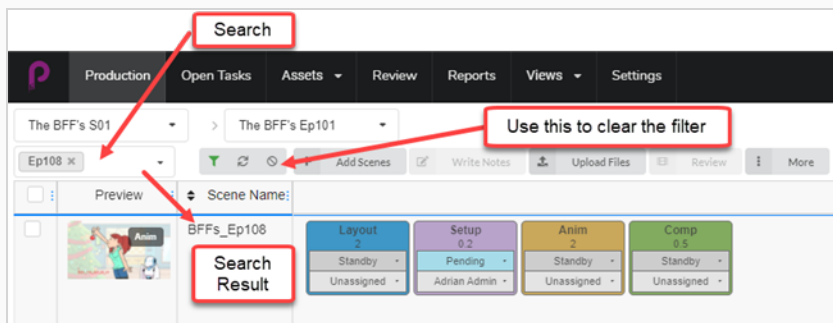
Everyone in the production will be able to view the custom field. Only certain users will have the ability to add them.

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.

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.

1	A	B	C	D	E	F	G
1	Scene to create or update This is a required identifier Name or code can be used		External Reference Metadata Required to retrieve offline stage file {"workspaceId":"offline_001","relativePath":"006","type":"harmonyStandalone"}			This column will be deleted or not used	
2	Scene Name	Frames	Workspace Id	Relative Path	ExternalRef Type	Note Anim	Note Compo
3	SQ01_01	10	offline_001	001	harmonyStandalone	Note Anim 01	Note Compo 01
4	SQ01_02	100	offline_001	002	harmonyStandalone	Note Anim 02	Note Compo 02
5	SQ01_03	200	offline_001	003	harmonyStandalone	Note Anim 03	Note Compo 03
6	SQ01_04	300	offline_001	004	harmonyStandalone	Note Anim 04	Note Compo 04
7	SQ01_05	90	offline_001	005	harmonyStandalone	Note Anim 05	Note Compo 05
8	SQ01_06	50	offline_001	006	harmonyStandalone	Note Anim 06	Note Compo 06
9	SQ01_07	20	offline_001	007	harmonyStandalone	Note Anim 07	Note Compo 07
10	SQ01_08	500	offline_001	008	harmonyStandalone	Note Anim 08	Note Compo 08
11	SQ01_09	40	offline_001	009	harmonyStandalone	Note Anim 09	Note Compo 09
12	SQ01_10	30	offline_001	010	harmonyStandalone	Note Anim 10	Note Compo 10

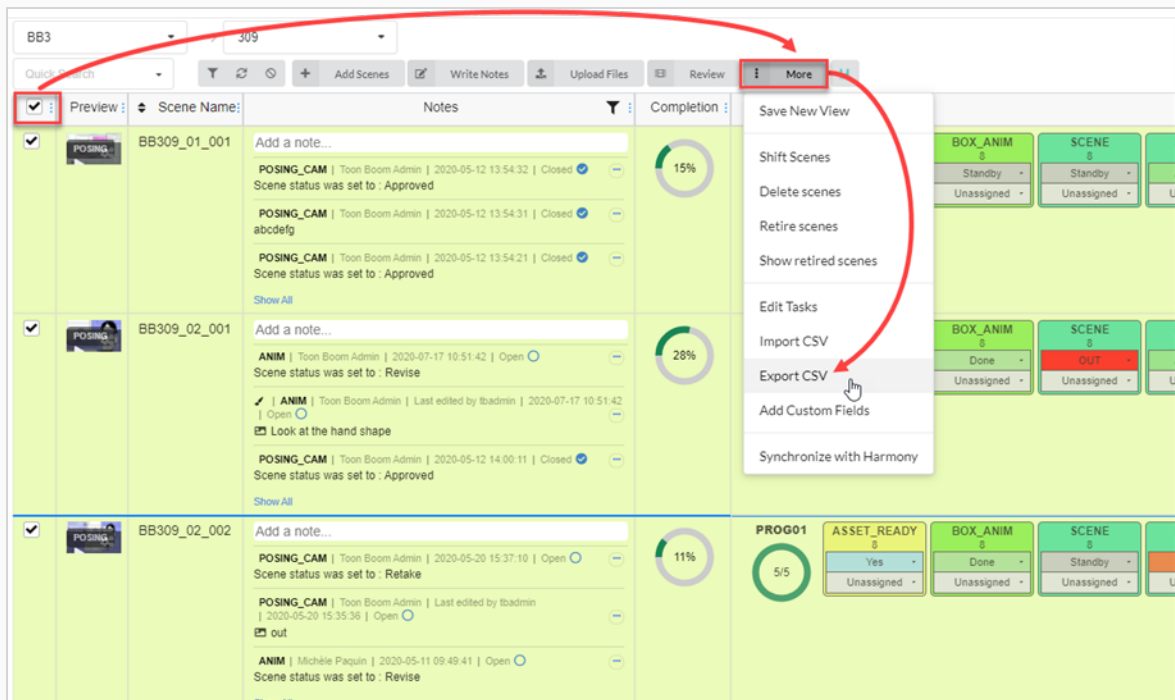
- You are responsible to avoid doubling the asset and scene names in your spreadsheet. Producer will not accept duplicate names and will suggest skipping the problematic entries.
- 2-bit characters and special characters can be imported via CSV file upload only. It will not work by copying and pasting 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](#).

Exporting CSV File

Producer allows you to export/import data through CSV files.

How to export a csv file

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 or several 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.

Export CSV

Scenes will be exported with the following properties

<input checked="" type="checkbox"/> type	<input type="checkbox"/> code	<input checked="" type="checkbox"/> name	<input type="checkbox"/> job_code	<input checked="" type="checkbox"/> completion	<input checked="" type="checkbox"/> frames	<input checked="" type="checkbox"/> work
tba/scene	TBA_SCENE00359	BB309_01_001	TBA_JOB00045	15.3	1297	PIPELINE
tba/scene	TBA_SCENE00360	BB309_02_001	TBA_JOB00045	27.8	70	PIPELINE
tba/scene	TBA_SCENE00361	BB309_02_002	TBA_JOB00045	10.5	132	PIPELINE
tba/scene	TBA_SCENE00362	BB309_02_003	TBA_JOB00045	15.3	99	PIPELINE
tba/scene	TBA_SCENE00363	BB309_02_004	TBA_JOB00045	17.8	13	PIPELINE
tba/scene	TBA_SCENE00364	BB309_02_005	TBA_JOB00045	15.3	15	PIPELINE
tba/scene	TBA_SCENE00365	BB309_02_006	TBA_JOB00045	15.3	11	PIPELINE
tba/scene	TBA_SCENE00366	BB309_02_007	TBA_JOB00045	15.3	60	PIPELINE
tba/scene	TBA_SCENE00367	BB309_02_008	TBA_JOB00045	15.3	47	PIPELINE

Cancel Export CSV

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**.

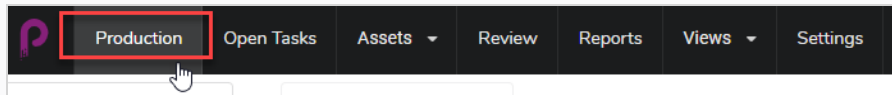
A CSV file automatically downloads.

Displaying the Environment and Job Codes

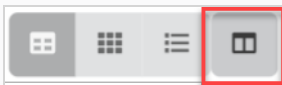
When creating a CSV file to create scenes or jobs, you need to include the job code, in which these scenes will be created or the environment code, in which the new jobs will be.

How to display the Environment code:

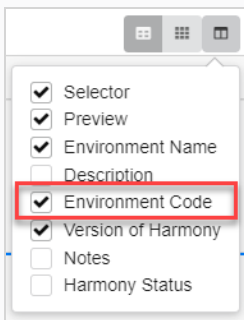
1. In the main menu, select **Production**.



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.

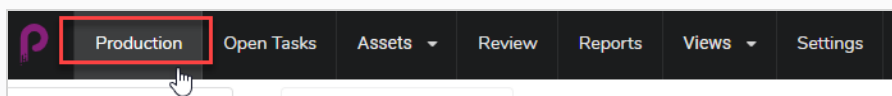


The Environment Code column appears in the list of environments.

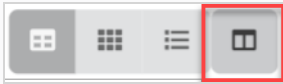
	Preview	Environment Name	Environment Code
<input type="checkbox"/>	NO PREVIEW	Temp	TBA_ENVIRONMENT00003
<input type="checkbox"/>		The BFF's S01	TBA_ENVIRONMENT00002

How to display the Job code:

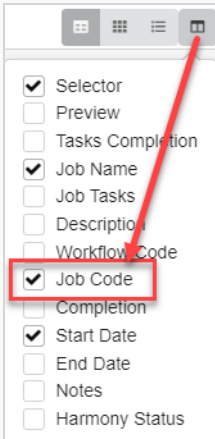
1. In the main menu, select **Production**.



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.

The screenshot shows a job list interface. At the top, there is a dropdown menu for 'The BFF's S01' and another dropdown menu for 'All Jobs'. Below these is a 'Quick Search' field and a 'Add Jobs' button. The main table has two columns: 'Job Name' and 'Job Code'. The 'Job Code' column header is highlighted with a red box. A red arrow points from the 'Job Code' header to the 'Job Code' values in the rows below. A red curved arrow points from the 'Job Code' header to the 'Job Code' values in the first row.

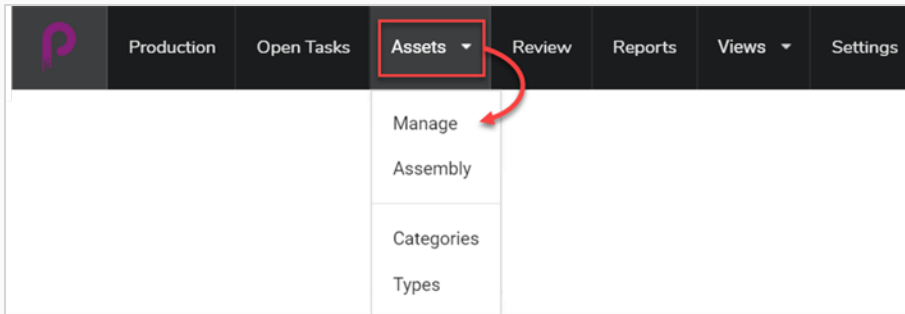
	Job Name	Job Code
<input type="checkbox"/>	The BFF's Ep101	TBA_JOB00002
<input type="checkbox"/>	The BFF's Ep102	TBA_JOB00003
<input type="checkbox"/>	The BFF's Ep103	TBA_JOB00004
<input type="checkbox"/>	The BFF's Ep104	TBA_JOB00005
<input type="checkbox"/>	The BFF's Ep105	TBA_JOB00006

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.

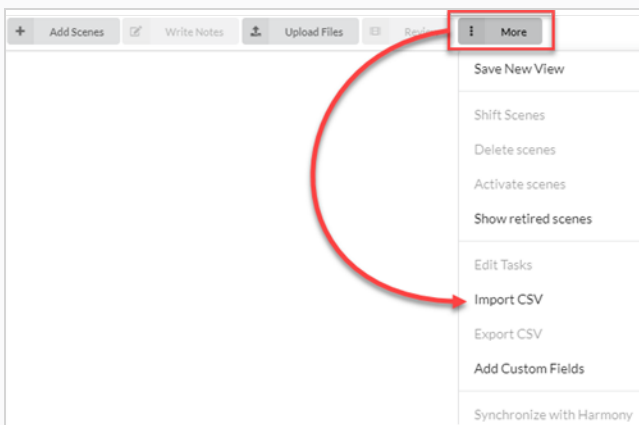
How to upload a CSV file or copy data from a CSV file:

1. Go either to **Assets > Manage**.

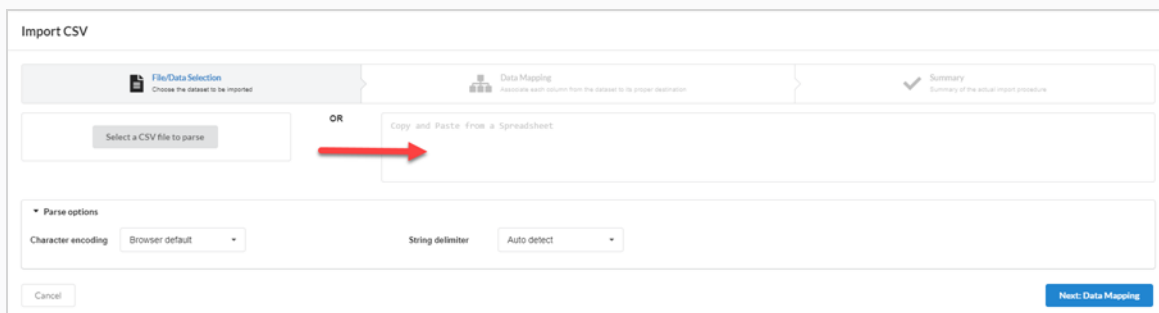


Or navigate to the Environment, then to the Job where you want to create items from your CSV data.

2. Click on the **More** tab and select **Import CSV**.



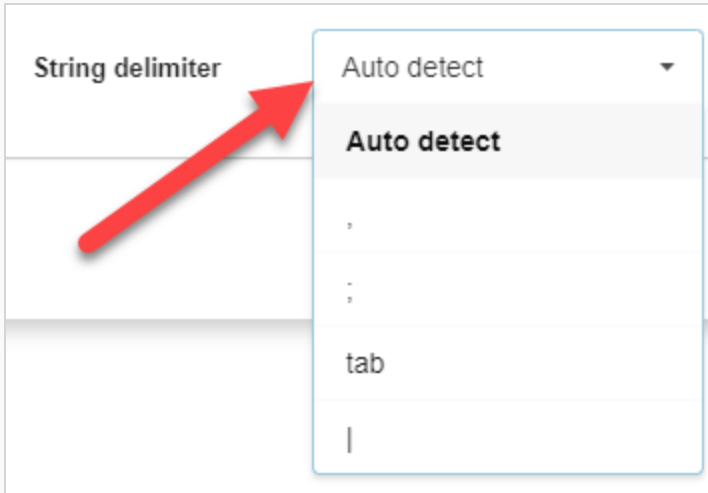
The Import CSV dialog box opens.



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

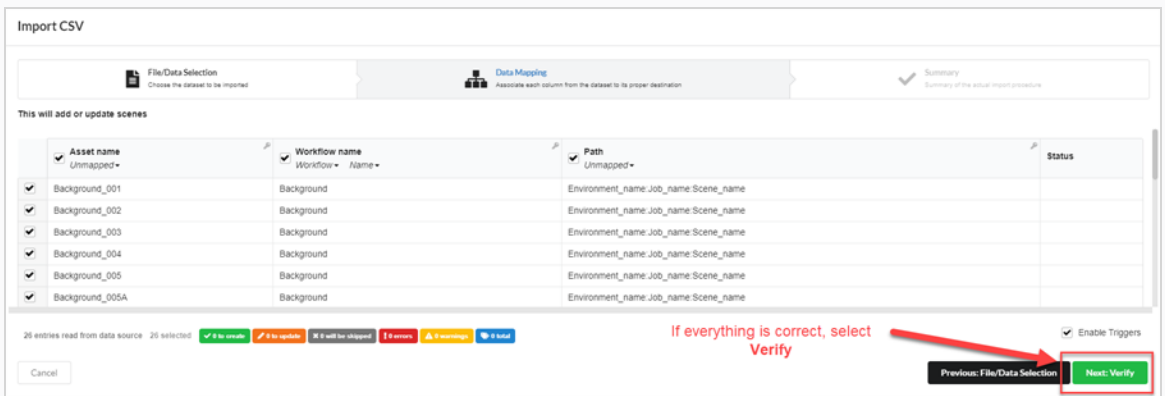
4. Set up your String Delimiter to **Auto detect**.



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.

The screenshot shows the 'Import CSV' interface. At the top, there are three steps: 'File/Data Selection', 'Data Mapping', and 'Summary'. Below this, a table titled 'Verified' displays scene data. The table has columns for 'Scene Name', 'Frames', and 'Status'. The 'Status' column contains icons for success, warning, and error. A red box highlights a warning icon in the 'Status' column for the first row. Below the table, there are buttons for 'Errors', 'Warnings', and 'Status'. A red arrow points from the 'Errors' button to the 'Errors' text below it.

Scene Name	Frames	Status
SQ01_01	10	Warning
SQ01_02	100	Success
SQ01_03	200	Success
SQ01_04	300	Success

10 entries read from data source 10 selected 0 to create 0 to update 0 will be skipped **10 errors** **0 warnings** **0 total** Enable Triggers

Cancel **Errors** Previous: File/Data Selection Next: Verify

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:

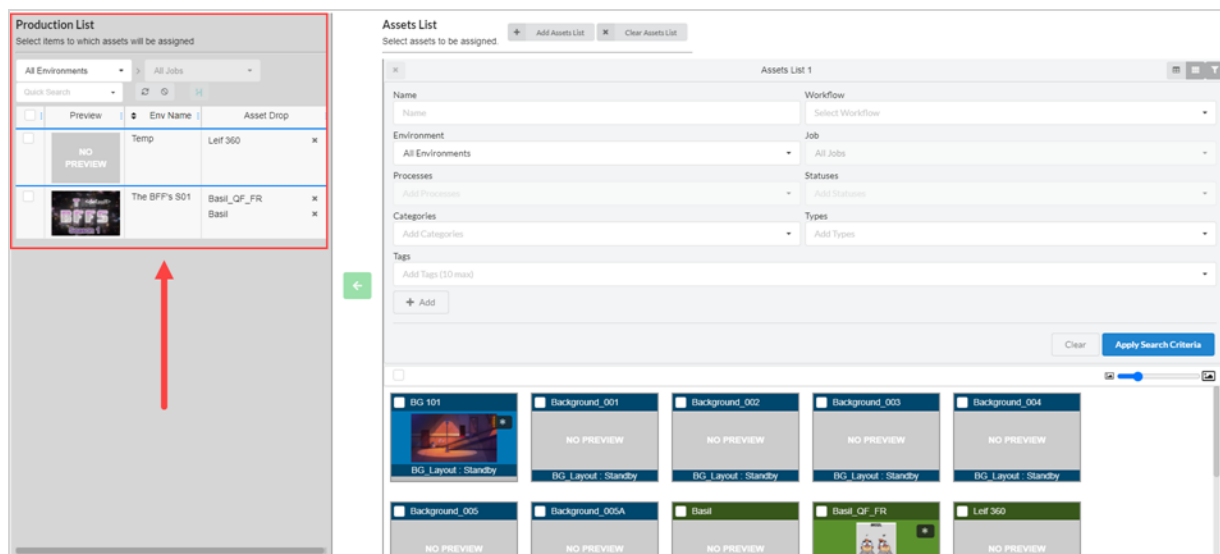
- If an asset will only be used in one or a couple scenes in an episode, it makes sense to assemble it with each scene in which it is used.
- If an asset is to be used throughout one or a few episodes, it makes sense to assemble it with each job representing each episode in which it is used.
- If an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

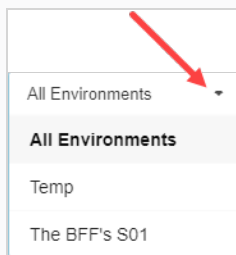
The left area of the Assembly page is where you can navigate your production to locate the right environment, job or scene, and the right area of the page is where you can browse through and search for assets.



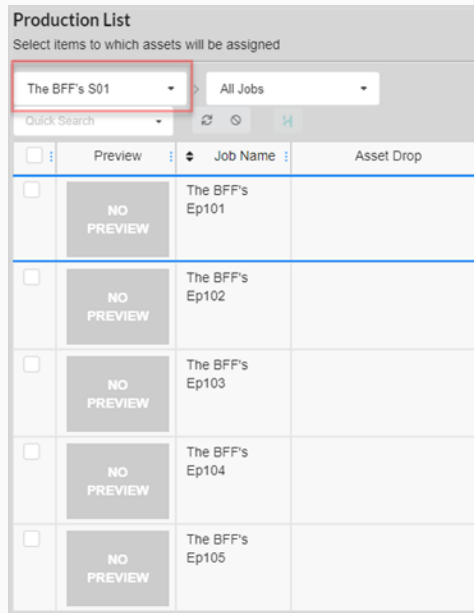
The first step to assembling is browsing through the Production List panel to find the item you want to associate assets with.

How to search the production list

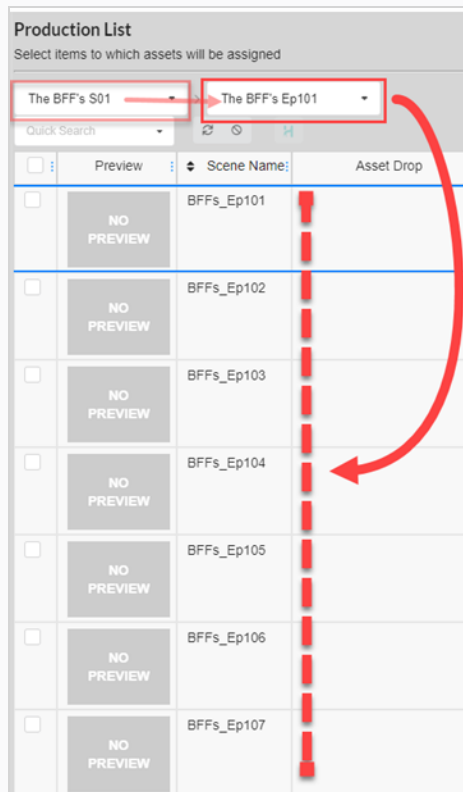
1. In the top menu, select **Assets > Assembly**.
The Assembly page opens and the Production List panel appears to the left.
2. In the Production List panel, navigate to the production item with which you want to assemble assets:
3. To assemble assets to an environment, in the environments drop-down 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.



- 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.

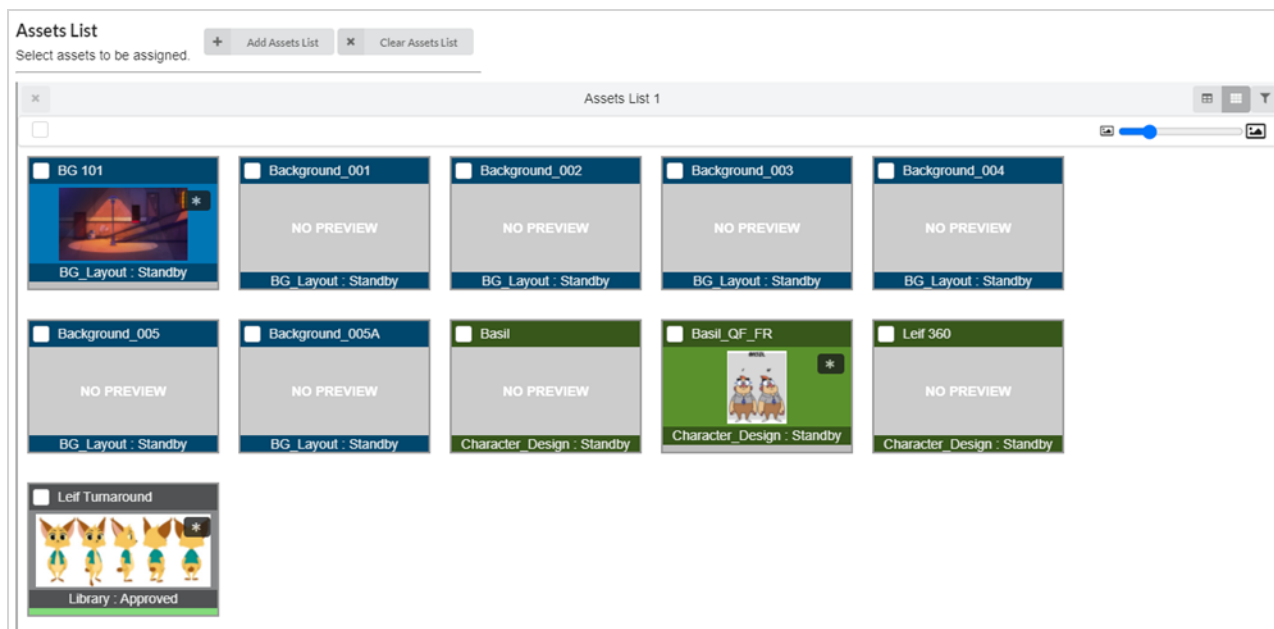
7. To list all items again, do one of the following:

- 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.

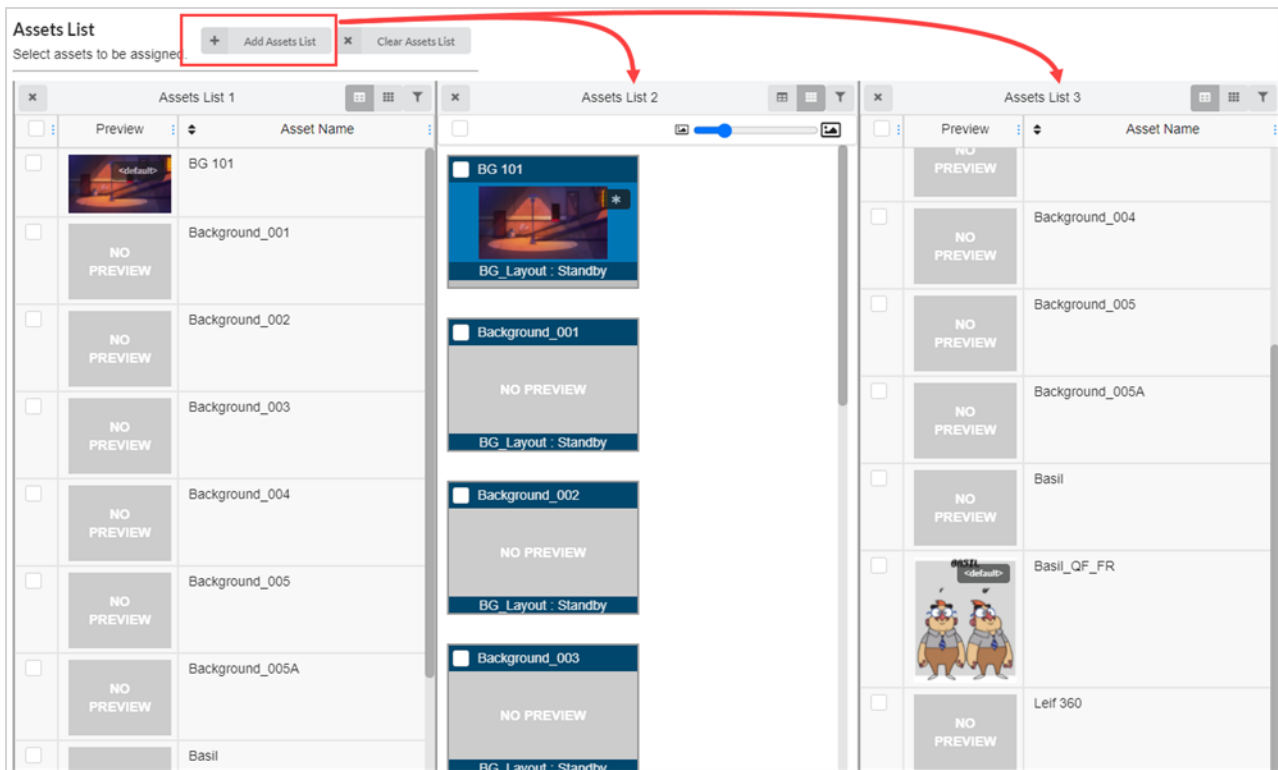
Browsing and Finding Assets

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.

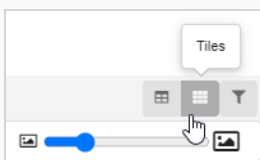


It is also possible to have several lists of assets in the Assembly page, each one taking a part of the space reserved to the assets list. Each list can have its own unique search filters and display settings.

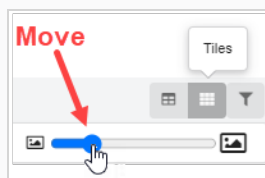


How to change the size of thumbnails in the assets list

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.



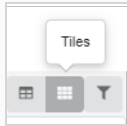
How to change the display mode of the assets list

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

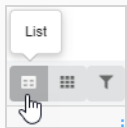
The Assembly page opens. The Asset List panel appears to the right.

2. Do one of the following:

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



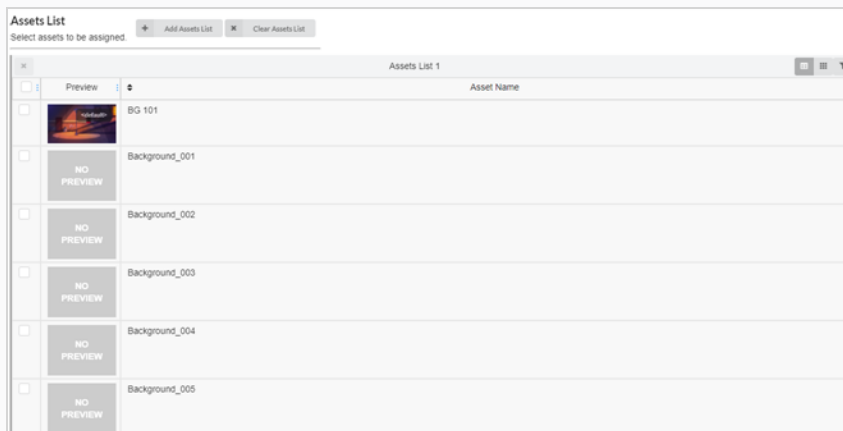
- To view the Asset List in list mode, click **List**.




How to filter assets in the assets list

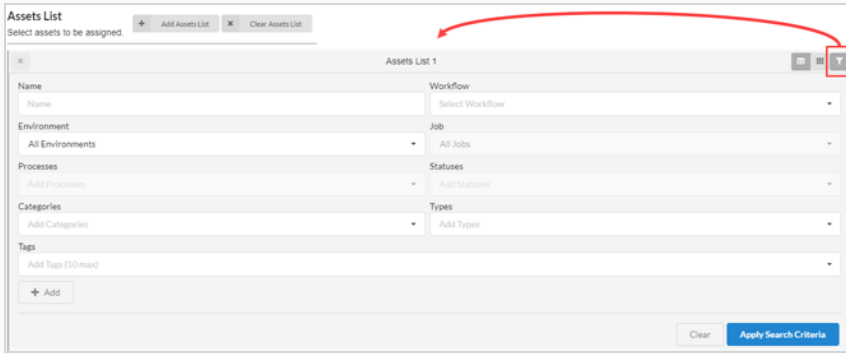
1. In the top menu, select **Assets > Assembly**.

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.

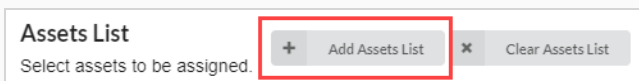
The search panel appears below the toolbar.

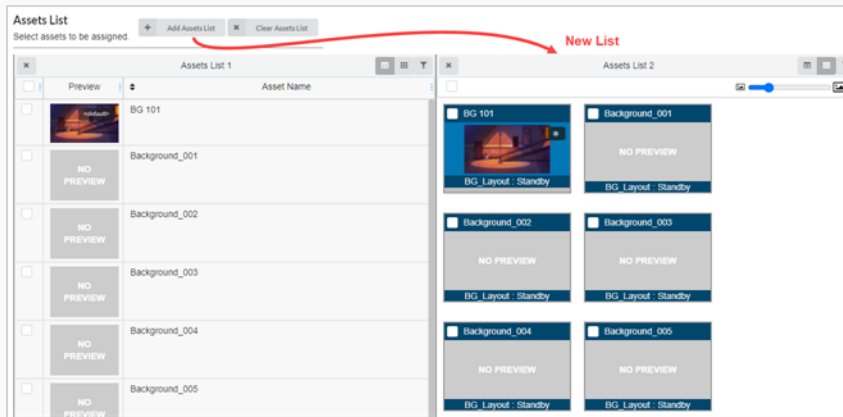


3. Do one or several of the following to filter the list of assets to the assets you want to assemble:
 - In the Name field, type in the name, or part of the name, of the asset you are searching for.
 - In the Workflow drop-down menu, select the workflow associated with the asset you are searching for.
 - 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.





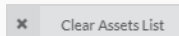
3. To rename an asset list, click anywhere at the top of the list around the current name. The text box can now be edited.
4. Type in a new name for the asset list in the text box, then click anywhere outside of the text box. The asset list has now been renamed.

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

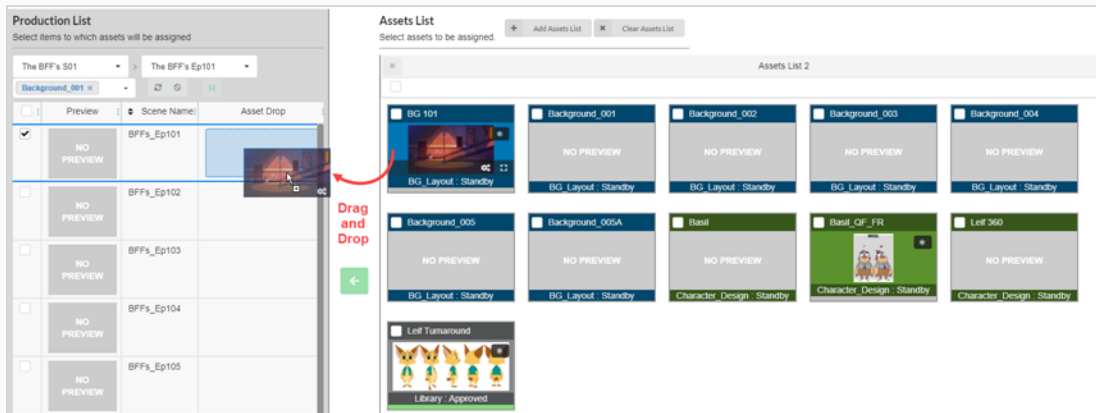
You can assemble assets by associating assets with the environments, jobs, and scenes in which they are used. If an asset is only used in a few scenes, it can be assembled to those scenes; if it is only used in a few episodes, it can be assembled to said jobs; if it will be used throughout an entire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

How to assemble one asset at a time

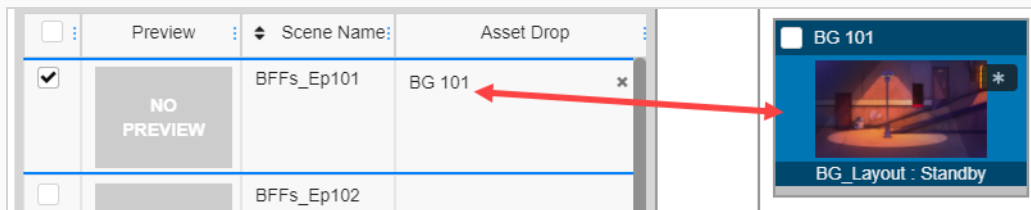
1. In the top menu, select **Assets > Assembly**.

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.

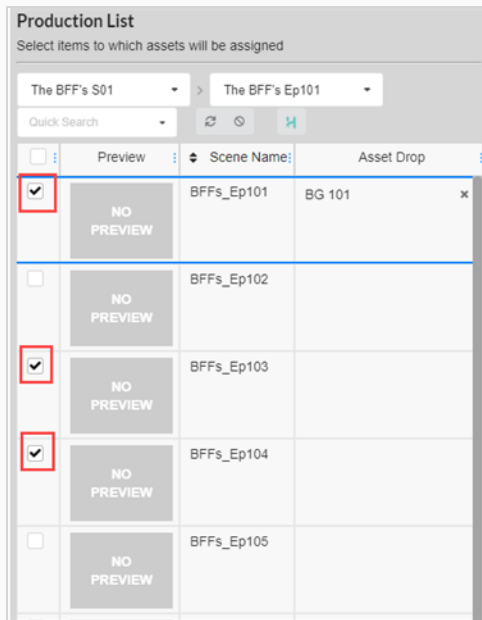


How to assemble multiple assets at once

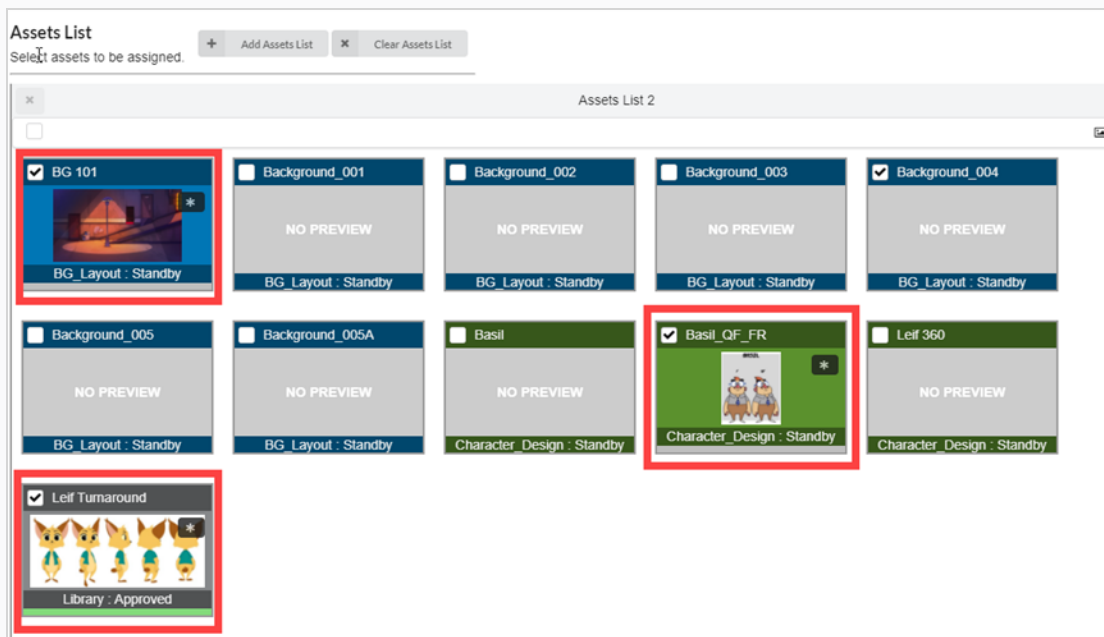
1. In the top menu, select **Assets > Assembly**.

The Asset List opens.

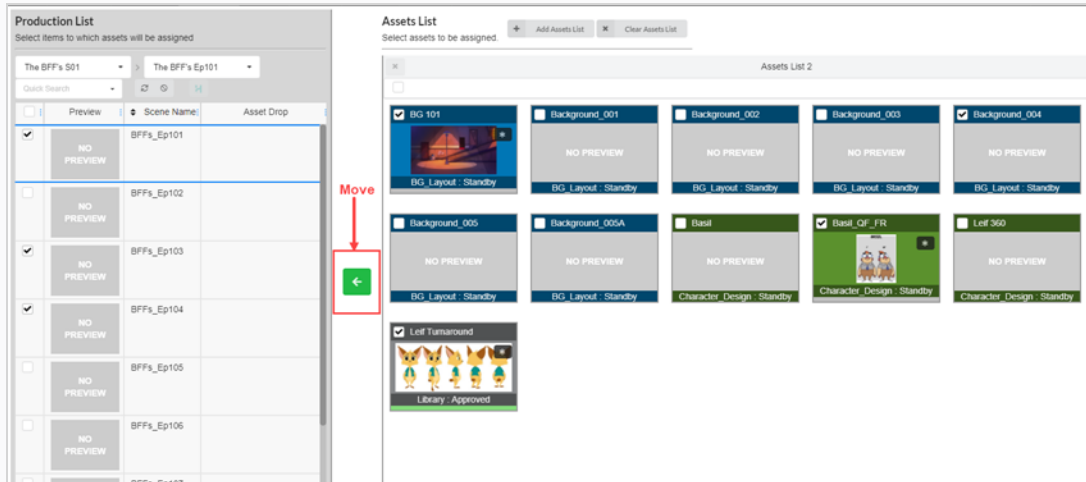
2. Locate the environment/s, job/s, or scene/s you want to associate the asset to from the production List—see [Searching Production List](#).
3. Select the item by checking the checkbox on the far left column of each item you wish to associate the asset to.



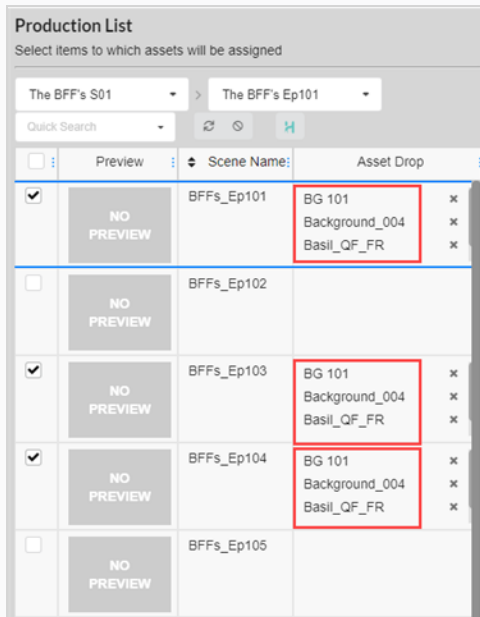
4. Locate the asset you want to associate to an environment, scene or job from the Assets List.
5. Select the asset by enabling the checkbox on the far left column of each asset you want to associate to an item.



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.

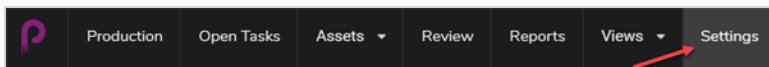
The asset is removed from the Asset Drop column.

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.

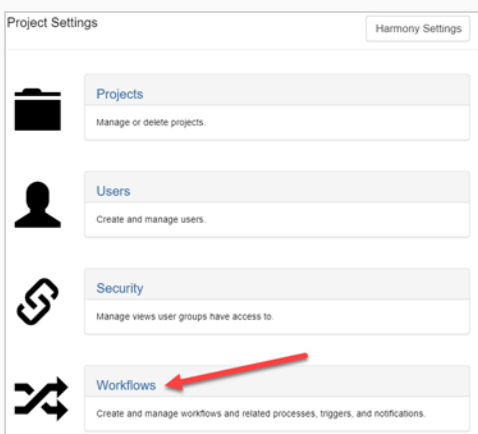
How to add a Progress node to a workflow

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



The Project Settings are displayed.

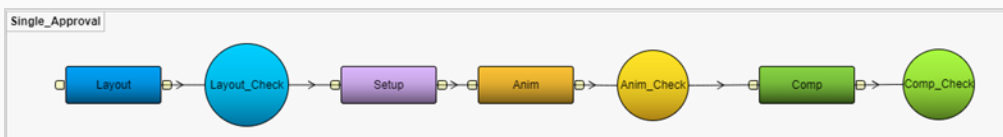
2. Select **Workflows**.



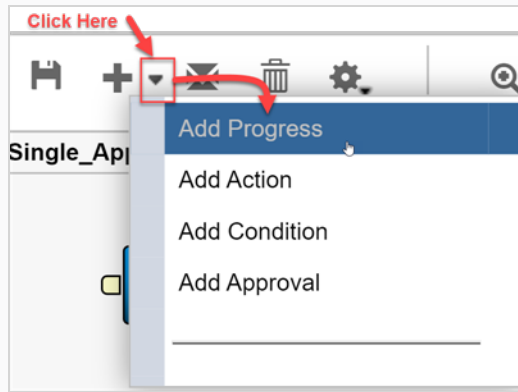
The Workflow tab opens.

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

The workflow appears in the editor.



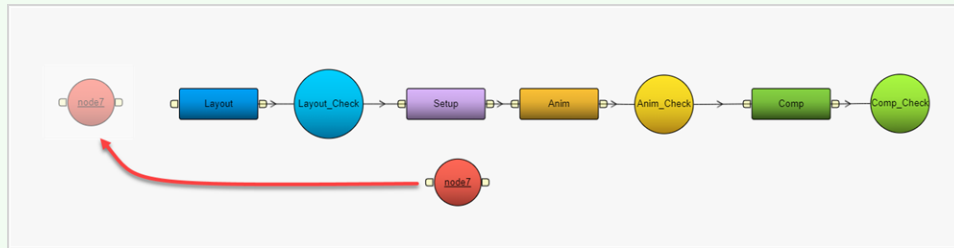
4. Click on the drop-down arrow **BESIDE** the Add Process button.
5. Select **Add Progress**.



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.



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

Chapter 9: About Harmony Integration

Producer can be used independently from other Toon Boom software. However, there is a high level of integration possible for a studio using Harmony as an animation software and even more so when using Harmony database. This chapter will cover the aspects of synchronization between Producer and Harmony database as well as the increasingly popular setup to work remotely.

Working Remotely

Working from home is an increasingly popular trend that has advantages as well as challenges. Smooth data transfer and proper versioning will go a long way to help maintain efficiency.

When working with a Harmony Database in a studio, the scenes and assets are located on the server and the users can edit them directly. With Internet connections varying in quality, this is not practical when working remotely and it is best to transfer the scenes or assets locally to work on them with Harmony Standalone.

To accomplish this, the Harmony scenes need to undergo these operations in order:

Being Checked-out, Exported, Compressed, Uploaded to a cloud exchange folder, Downloaded to the remote client, Decompressed, Worked on, Saved locally, Rendered (with the rendered preview pushed to Producer for approval), Compressed, Uploaded to a cloud exchange folder, Downloaded to the server, Decompressed, Imported in the Database and Checked-in.

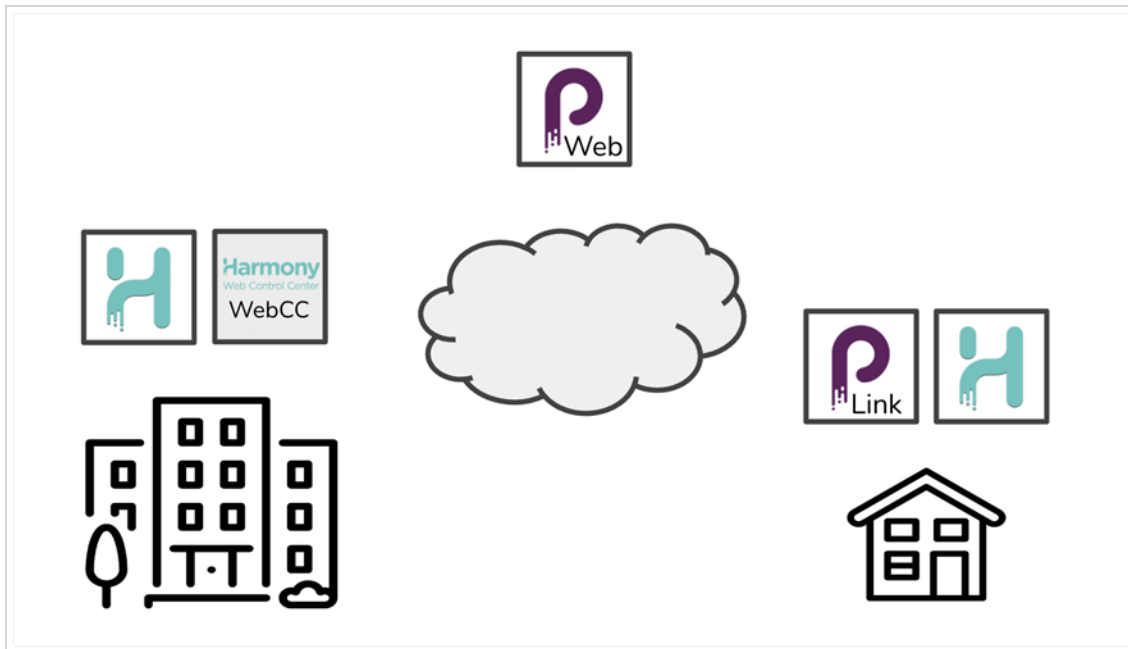
Producer will play a key role in simplifying the above process so that the end-user will only have a few clicks to do.

Configuring Access

For the scenes to transition smoothly between the Harmony server and the remote client, we will need to configure a few applications and establish a few exchange folders.

The applications involved in the exchange process are the following:

- Harmony Server (at the studio)
- WebCC (at the studio)
- Producer (in the cloud)
- Producer Link (at home)
- Harmony Standalone (at home)



Harmony Server

The Harmony Server is at the studio, hosting the database. In the context of working in offline mode, it will handle user requests for exporting/importing scenes and checking scenes in and out.

WebCC

Installed on the Harmony server (or on a Harmony client) at the studio, this application will handle all communication between Producer and Harmony. It will be responsible for regularly querying a message queue (amqps) from Producer. It needs to be set up to point to the correct Producer address. There are several configuration options.

Producer

The users are typically making requests through the Producer web application. When operations need to be done on the Harmony server (such as exporting a database scene), Producer will leave a message for WebCC. If an operation is requested on the local machine (such as decompressing a file or opening a scene in Harmony), Producer will launch the local application Producer Link.

Producer Link

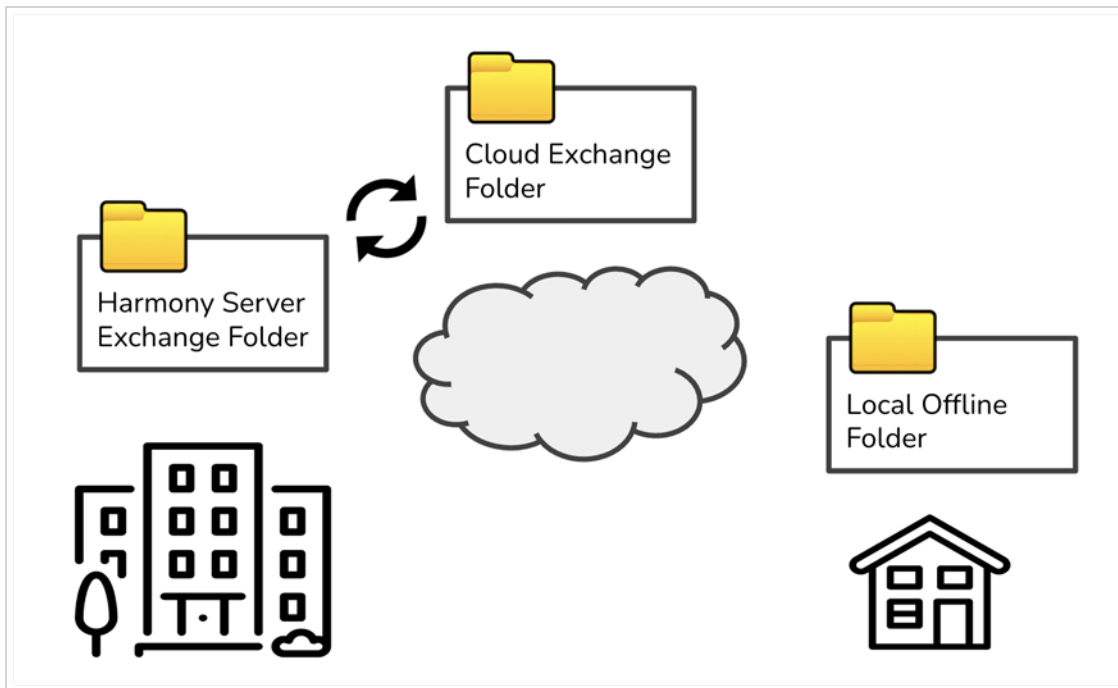
This local desktop application is a complement of the Producer web application. It is used to run various local operations that are not permitted by a web application (any tasks requiring direct access to edit local files, such as decompressing a file). We also use Producer Link to set up exchange folders, workspaces and other important configuration.

Harmony Standalone

In the context of working from home with Producer and Harmony database scenes, we will have to adapt Harmony Standalone by installing the snapshot scripts. These scripts should be installed by every home user and will considerably simplify the process of updating the Harmony database after local work has been completed.

The exchange folders needed are as follow:

- Harmony Server Exchange Folder (at the studio)
- Cloud Exchange Folder (in the cloud)
- Local Offline Folder (at home)



Harmony Server Exchange Folder

Located on the Harmony server, this folder exists by default in /USA_DB/exchange. Scenes that are exported from the Harmony database will appear here. This folder will need to be synchronized with the Cloud Exchange Folder. The synchronization is typically accomplished through a cloud storage service, such as Google Drive or DropBox.

Cloud Exchange Folder

This folder is a cloud replica of the Harmony Server Exchange Folder. It will contain subfolders with the Harmony usernames of the people exporting and importing scenes (username/exported/ and username/importing). These subfolders will need to be shared and mounted locally for each home user.

Local Offline Folders

This is where database scenes are stored and decompressed on the client machine while they are being worked on remotely.

Setting up the Cloud Exchange

The Harmony server exchange folder needs to be prepared and configured so that remote users can synchronize their exported scenes and files via a cloud service. By default, this exchange folder is located on the Harmony file system under `/USA_DB/exchange`. This is where all exported and imported scenes will be temporarily stored for every Harmony user.

The default location of the exchange folder can be customized when launching the WebCC service with the option `-exchange "/path/to/exchange folder"`.

Once the Harmony server and WebCC are up and running, it is now time to synchronize the content of the exchange folder with a cloud service. For this example we will use Google Drive.

How-to share the Harmony Server Exchange Folder on the Cloud

As a studio system administrator, you need to share the Harmony server exchange folder through a cloud storage service.

1. Download and install the Google Drive application on the host of the Harmony server exchange folder.
2. Using the Google Drive interface, add your Harmony Server Exchange Folder (`/USA_DB/exchange`) to the list of folders to be synchronized with Google Drive.

NOTE

The exchange folder can either be created within the Google drive file structure or individually added to it for synchronization.

Sharing cloud exchange access with individual remote users

When everything is configured server side, a system administrator will need to share access with all remote users. It is recommended to specifically and individually share the Harmony user exchange subfolder (Cloud Exchange Folder/`userName/`) and not the full access to the exchange folder itself. This will ensure each user only downloads and synchronizes their own files and scenes.

1. First, the exchange subfolder for every home user needs to be created. This can be done in one of two ways:
 - a. Manually: You can find the list of Harmony users on the Harmony server in `/USA_DB/users/`. Create these user folders directly under the Cloud Exchange Folder. You should end up with a structure similar to this:

Cloud Exchange Folder/
 - └ Andres/
 - └ Barbara/
 - └ Jonathan/
 - b. Automatically: When users are exporting a Harmony Database Scene, either through WebCC, Harmony Control Center or Producer, the Harmony user exchange folder will be created.
2. From the Google Drive web Interface, select each Harmony user exchange folder (Cloud Exchange Folder/`userName/`) and share it with the appropriate user's email.

How-to mount my Harmony user exchange subfolder

As a remote Harmony user, you need to mount the Harmony user exchange subfolder that was shared with you. You have likely received an email informing you that a system administrator has shared a folder with you.

1. Download and install the Google Drive application on your home computer.
2. Using the Google Drive web interface, find the Harmony user exchange subfolder that your system administrator has shared with you (under: "Shared with me").
3. Right-click on the folder and select "Add a shortcut to My Drive".
4. Right-click on the folder and select specify that this folder needs to be accessible offline.

Once the above is completed, you should look into configuring Producer Link to work remotely on a Harmony Database.

Exporting and Managing Scenes Offline

Once the setup for working remotely has been completed, the user has the possibility to initiate the exporting and opening of scenes directly from the Producer web interface. If needed, the local desktop application Producer Link will open automatically to assist the user in completing the appropriate operations.

Exporting Scenes Offline

The operation of exporting scenes from the Harmony Database can be combined with the actions of checking out the scene and opening it remotely. However, you may simply export scenes to prepare them for a later usage. This is what will be discussed here.

NOTE

Before attempting to export a scene, please be sure that Producer Link is set up correctly. - See [Setting up the cloud exchange](#) and Setting up Producer Link.

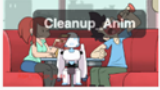


How to Export a Scene Offline from the Scene List

1. From the Production page, enter an environment by doing one of the following:
 - Select it from the Environment drop-down list
 - Double click on an Environment
2. Enter a job by doing one of the following:
 - Select it from the Job drop-down list
 - Double click on a Job
3. Highlight a scene (by clicking on it)

NOTE

At the moment, it is only possible to export one scene at a time.

The highlighted scene (the one surrounded by blue lines) will be exported, regardless of which scenes are selected via their checkboxes.

<input type="checkbox"/>	110_001		
<input type="checkbox"/>	110_002		
<input type="checkbox"/>	110_003		

4. Click on the More button and select Export Offline.

The screenshot shows the Producer 22 interface with the following elements:

- Top navigation: Kure-EnvMain01 > KureJob01 > All Scenes from Current Job
- Quick Search: [Search Box]
- Buttons: Add Scenes, Write Notes, Upload Files, Submit for Review, More (highlighted with a red box), and a Harmony icon.
- Table: A table with columns for Preview, Layout, Setup, Anim, and Comp. Each cell contains a dropdown menu with options like Standby and Unassigned.
- Dropdown Menu: A list of actions including Save New View, Show retired scenes, Activate scenes, Shift Scenes, Import CSV, Export CSV, Delete scenes (highlighted in red), Edit Tasks, Add Custom Fields, Synchronize with Harmony, Show synchronization logs, and Export Offline (highlighted with a red box and a red arrow).

5. (Optional) [Modify the export](#) options to suit your needs.
6. Click on the Export button.

The 'Export Offline' dialog box contains the following information:

- Producer Name:** SceneName
- Harmony Name:** Env: EnvironmentName Job: JobName Scene: SceneName
- Options:** Audio x, Element x, Timing x, Stage x, Palette x, Scene Palette x
- Export Scene:** The selected scene will be sent to Harmony for processing.
- Buttons:** Cancel and Export > (highlighted with a red box)

How to Export a Scene Offline from the Asset List

1. From the Asset Manage page, Highlight an asset (by clicking on it).

NOTE

The asset must be synchronized with a Harmony Server.

At the moment, it is only possible to export one asset at a time.

The highlighted asset (the one surrounded by blue lines) will be exported, regardless of which assets are selected via their checkboxes.

2. Click on the More button and select Export Offline.
3. (Optional) Modify the export options to suit your needs.
4. Click on the Export button.

How to Export a Scene Offline from the Open Task

1. From the Open Tasks page, Highlight a scene by clicking on it.

If the scene is synchronized with Harmony, the “Export Offline” button will appear.

2. Click on the “Export Offline” button.

The Export Offline dialog appears.

3. (Optional) Modify the export options to suit your needs.
4. Click on the Export button.

Export Offline

Producer Name	SceneName		
Harmony Name	Env: EnvironmentName	Job: JobName	Scene: SceneName

Options

Audio ×
Element ×
Timing ×
Stage ×
Palette ×
Scene Palette ×
▼

Export Scene

The selected scene will be sent to Harmony for processing.

Cancel

Export >

How to Modify the Export Options

When exporting a scene offline from the Harmony database, the user can select what should be exported along with the scene. The user can choose to add elements that may be exterior to the scene itself, such as an Environment Palette. Similarly, the user may decide that he does not need everything and choose to remove elements from the export.

By default, the following options are set:

- Audio
- Element
- Timing
- Stage
- Palette
- Scene Palette.

To add export options, click on the downward arrow at the end of the option lists to expand the drop-down and select all the options you want to add.

The screenshot shows the 'Export Offline' dialog box. It has a title bar 'Export Offline'. Below the title bar, there are two rows of labels and values: 'Producer Name' with 'SceneName' and 'Harmony Name' with 'Env: EnvironmentName', 'Job: JobName', and 'Scene: SceneName'. Below this is an 'Options' section containing a horizontal list of buttons: 'Audio x', 'Element x', 'Timing x', 'Stage x', 'Palette x', and 'Scene Palette x'. To the right of this list is a downward-pointing arrow, which is circled in red. Below the options is a section titled 'Export Scene' with the text 'The selected scene will be sent to Harmony for processing.' At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Export >' on the right.

To remove export options, click on the “x” next to it.

This screenshot is identical to the one above, showing the 'Export Offline' dialog box. However, in this version, the 'x' next to the 'Palette' button in the 'Options' section is circled in red, indicating that it is the element being targeted for removal.

WARNING

Do not remove the Stage option as it would not be possible to open the scene afterwards.

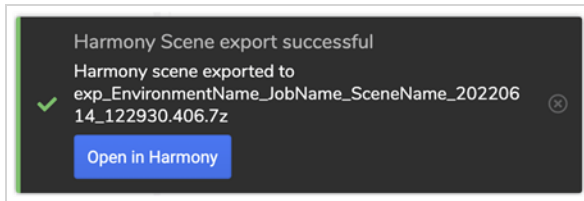
Here is a detailed description of each of the options:

Annotation	The different drawings created while drawing in the Annotation columns.
Audio	The content of the Audio directory.
Element	The contents of the Element directories. (tvg drawings or other file format imported as Elements in Harmony)
Timing	The contents of the Timing directories.
Stage	<p>The *.xstage, *.aux and other files that are necessary to open the scene.</p> <div data-bbox="451 856 1403 982" style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <p style="text-align: center;">WARNING</p> <p style="text-align: center;">This option should always be selected!</p> </div>
Pallette	The PALETTE_List file. The Palette list is a file listing every palette used for the scene and their location on the browser.
Scene Pallette	The palette-library of the scene level.
Job Pallette	The palette-library from the job level. When you select the job level, the palette-library in lower-level directories will also be exported. Every exported job palette will be placed within the folder named palette-library available under sceneName > jobs > Digital.
Env Pallette	<p>The palette-library from the environment level. When you select the environment level, the palette-library in lower-level directories will also be exported.</p> <p>Every exported environment palette will be placed within the folder named palette-library available under sceneName > environments > Digital.</p>
Backup Pallette	The palette-list file which is necessary for the scene to know which palettes to use. In most cases, it should be selected as well as the Scene Palette option.
Library	Templates created at the selected levels.
Scene Library	Templates created at the scene level.

Annotation	The different drawings created while drawing in the Annotation columns.
Job Library	Templates created at the job level.
Env Library	Templates created at the environment level.
Other	All other directories and files in the scene's data structure. For example, some studios will place within the scene folder their After Effect, Photoshop or Premiere project used for the scene.
Outside Drawings	If the Stage option is selected, it is possible to select the Get Outside Drawings option to copy drawings into the scene folder that is referred to by the Timing columns and their Element (Drawing) nodes.

Analyzing the Outcome of an Export

A Successful export will result in this pop-up message, offering you to open the scene with Harmony:



For an export to be successful, the following conditions must be met:

- WebCC service is running (in the studio).
- Scene, Job and Environment are synchronized.
- Producer Link's settings are properly set.
- The user is connected to the cloud storage application.

Here is a list of the most common failures that could occur following the export of a scene.

Results	Pop-up Messages	Likely cause
Failed export		Scene, Job or Environment is not synchronized, thus they are not available.
Unfinished export		<p>One or several of the following reasons:</p> <ul style="list-style-type: none"> • WebCC service is not running. • Server is slow and takes time to process the request. • Too many requests are being processed at the same time.


Opening Offline Scenes

There are multiple ways to open a Scene remotely.

- Open directly with the “Open in Harmony” button.
- Open a scene right after an export via the pop-up message.
- Open a scene later, using Producer Link.

All these methods will be discussed in detailed How-tos below. Whichever method you use, [the “Open Offline Scene” dialog](#) of Producer Link will be displayed.

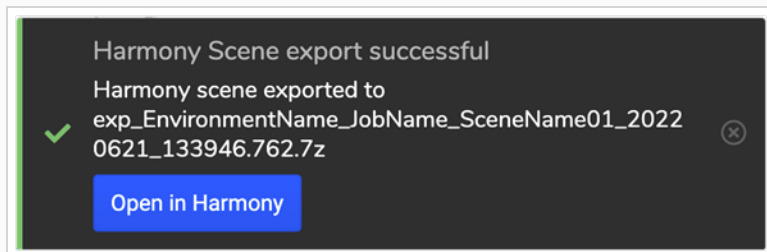
How to open a Scene Directly with the “Open in Harmony” button

1. If you have configured your Producer Link to “Open Scenes in Offline Mode”, the “Open in Harmony”  button will behave accordingly. If the scene has already been exported, it will open the default version of the latest export. If the scene has not yet been exported, it will proceed to export it right away and then, when it becomes available, it will unzip it and open the current version.

How to open a scene right after an export via the pop-up message.

As long as the pop-up message of a successful export is not closed, it is possible to open a scene from the Open in Harmony button available within the pop-up.

1. [Export a scene offline](#).
2. Click on the Open in Harmony button available on the pop-up message.



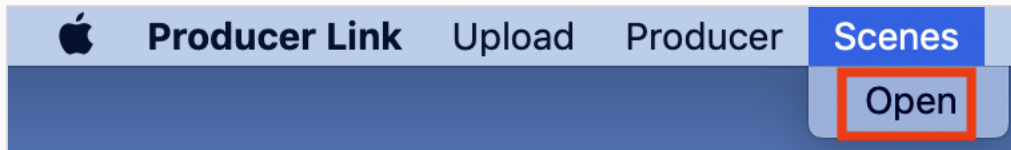
The Producer Link Open Offline Scene dialog opens.

3. Open the scene from the Open Offline Scene dialog.

How to open a scene later, using Producer Link

At any time, the user can have access to his exported scenes within the Open Offline Scene dialog of Producer Link.

1. Launch Producer Link.
2. From the Top Menu, go to Scenes > Open.

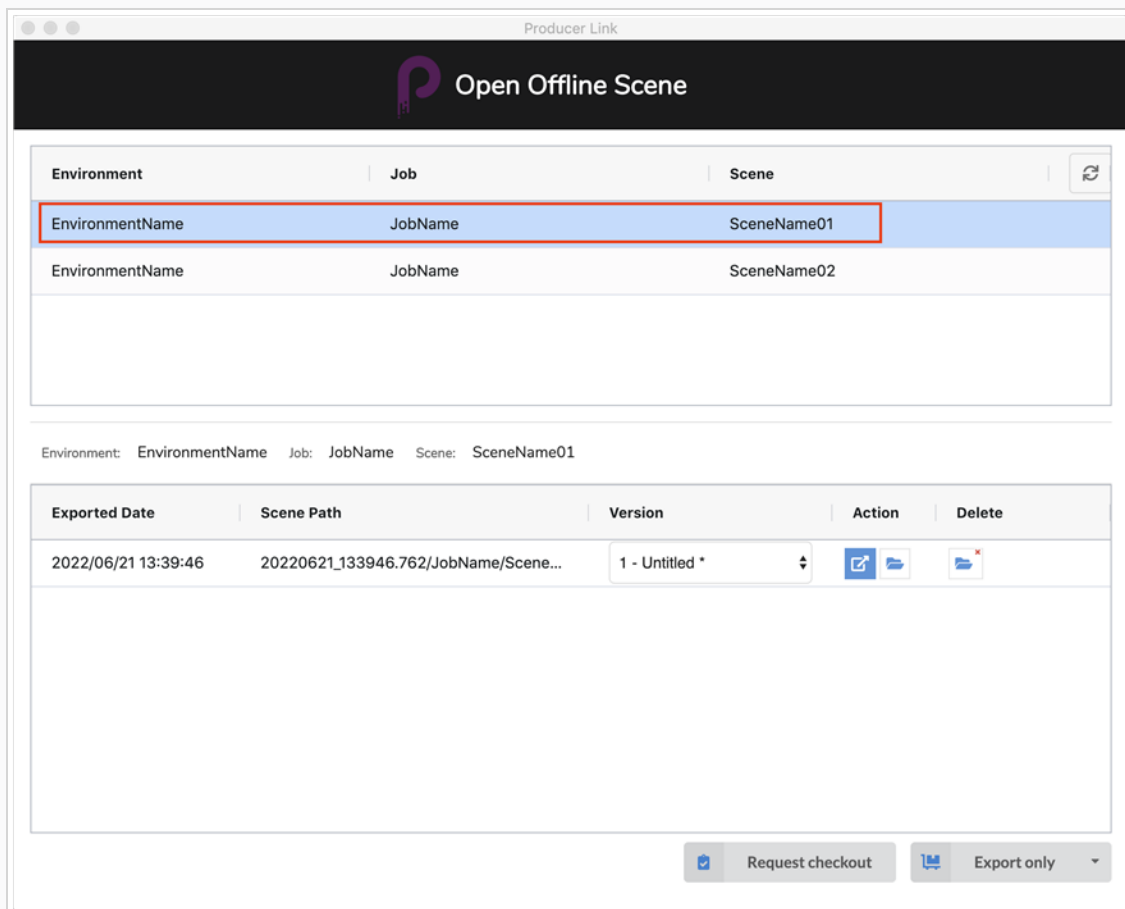


The Producer Link Open Offline Scene dialog opens.

3. Open the scene from the Open Offline Scene dialog.

How to open a scene from the Open Offline Scene dialog


1. In the top section, click on the scene you want to open.

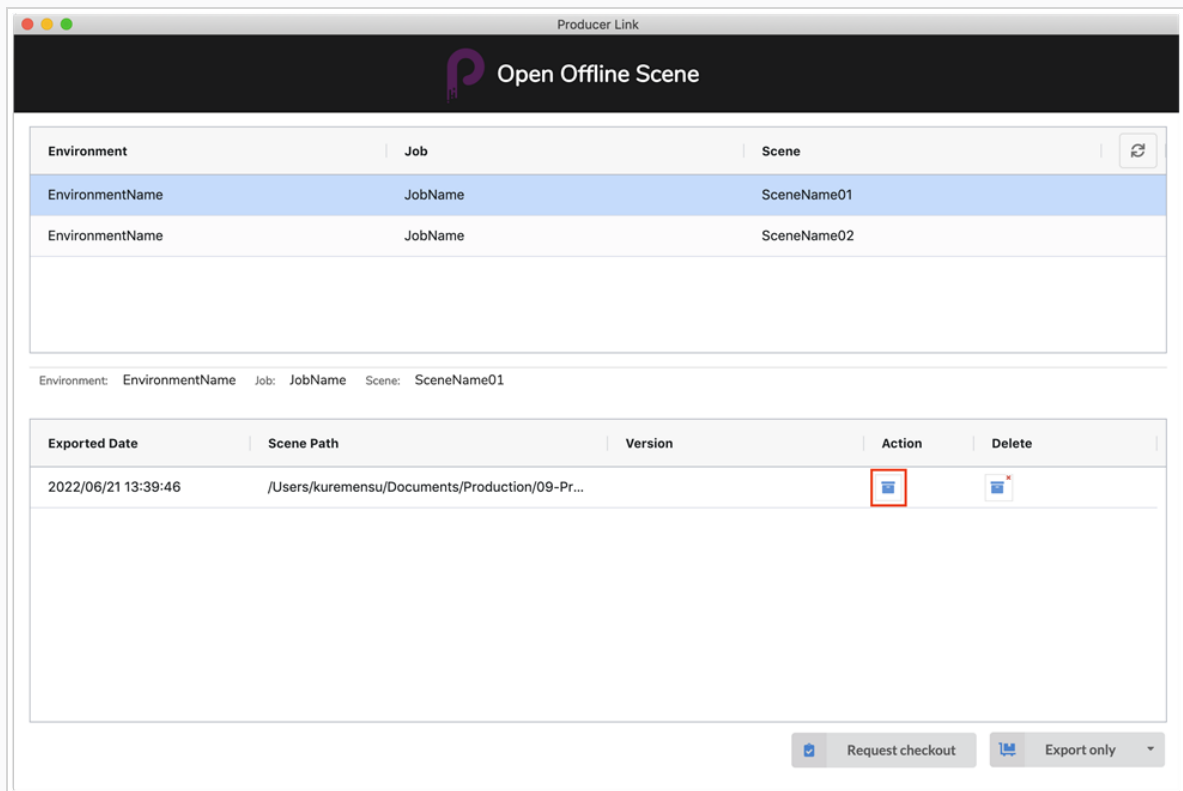


Once the scene is selected, the information regarding the export will be displayed in the lower section, allowing various possible actions depending on the status of the scene.

NOTE

If more than one export has been done for the selected scene, there will be multiple rows available in the lower section, the most recent export being listed at the top of the list.

2. Click on the  button to unzip and open the file.

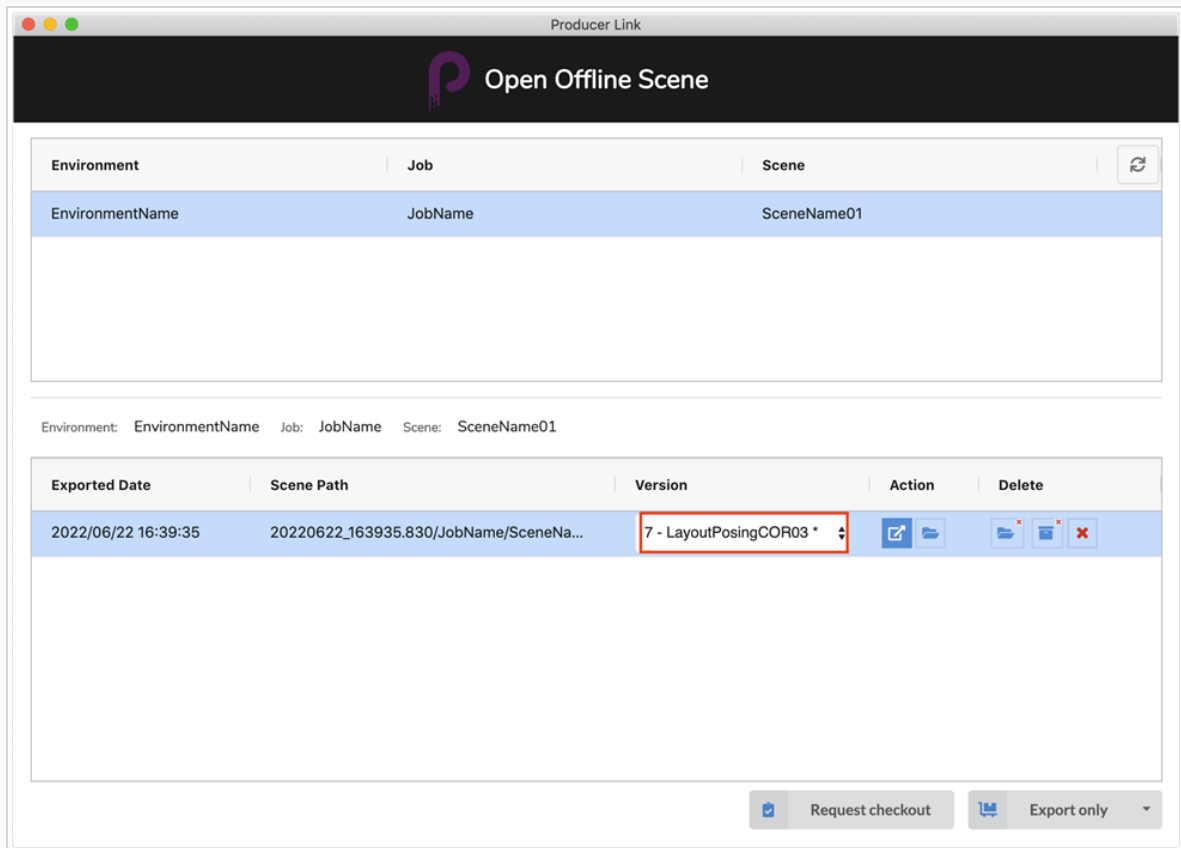


Once the scene is unzipped, other actions will become available.

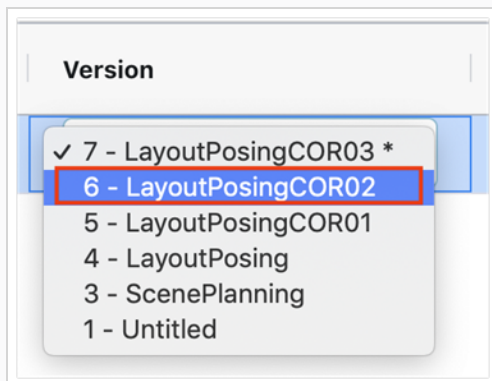
How to select a particular scene version

Just like Harmony, Producer Link will always show the current version by default. If you would like to open a different version, here is the procedure:

1. Click on the version drop-down.



2. Select the scene version you would like to open.



NOTE

The current database version is indicated by an asterisk (*). The current version will be updated when the scene is uploaded back to the database.

How to check out a scene

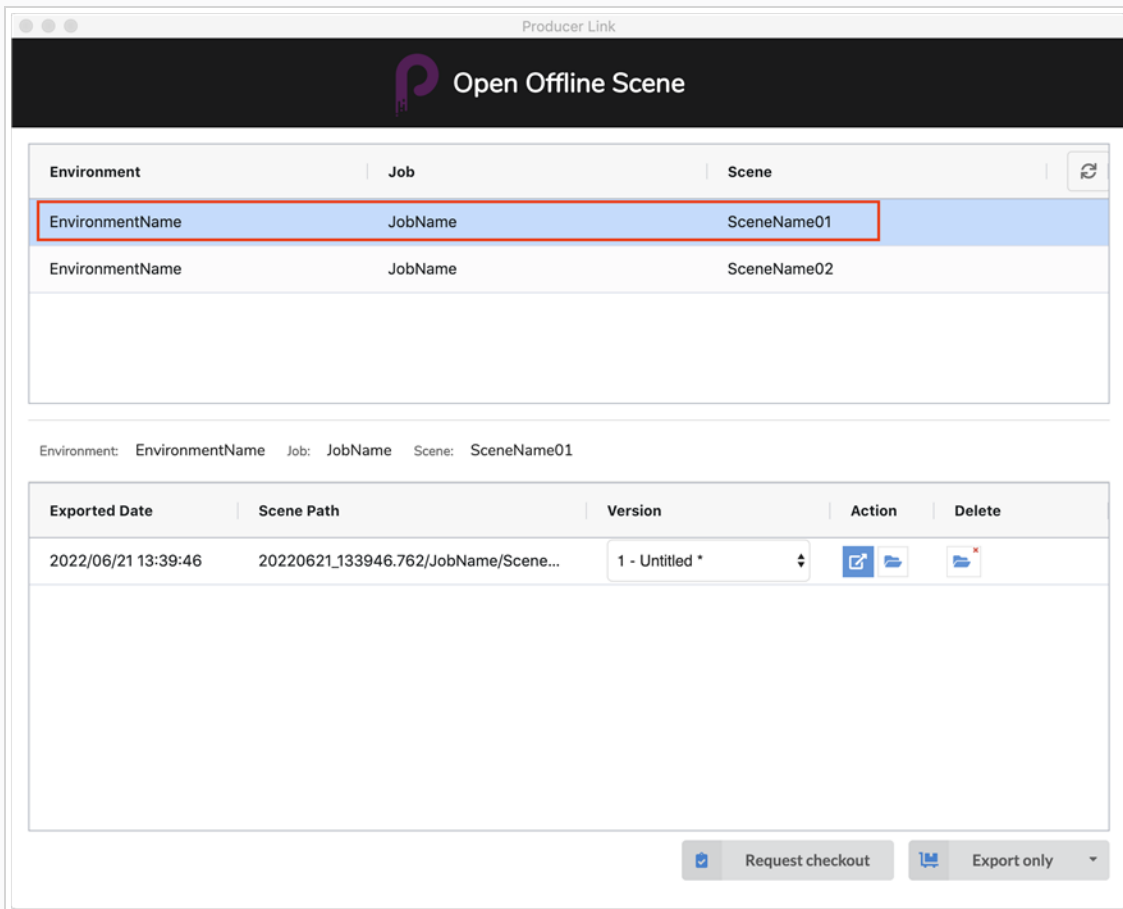
There are 2 situations in which a user may want to check out a scene.

- A scene has already been exported but has not been checked out yet.
- The user is about to request a scene export and would like to check out the scene at the same time.

Both situations are handled in the “Open Offline Scene” dialog of Producer Link. Here is [how you can access it](#).

Checking out an already exported scene

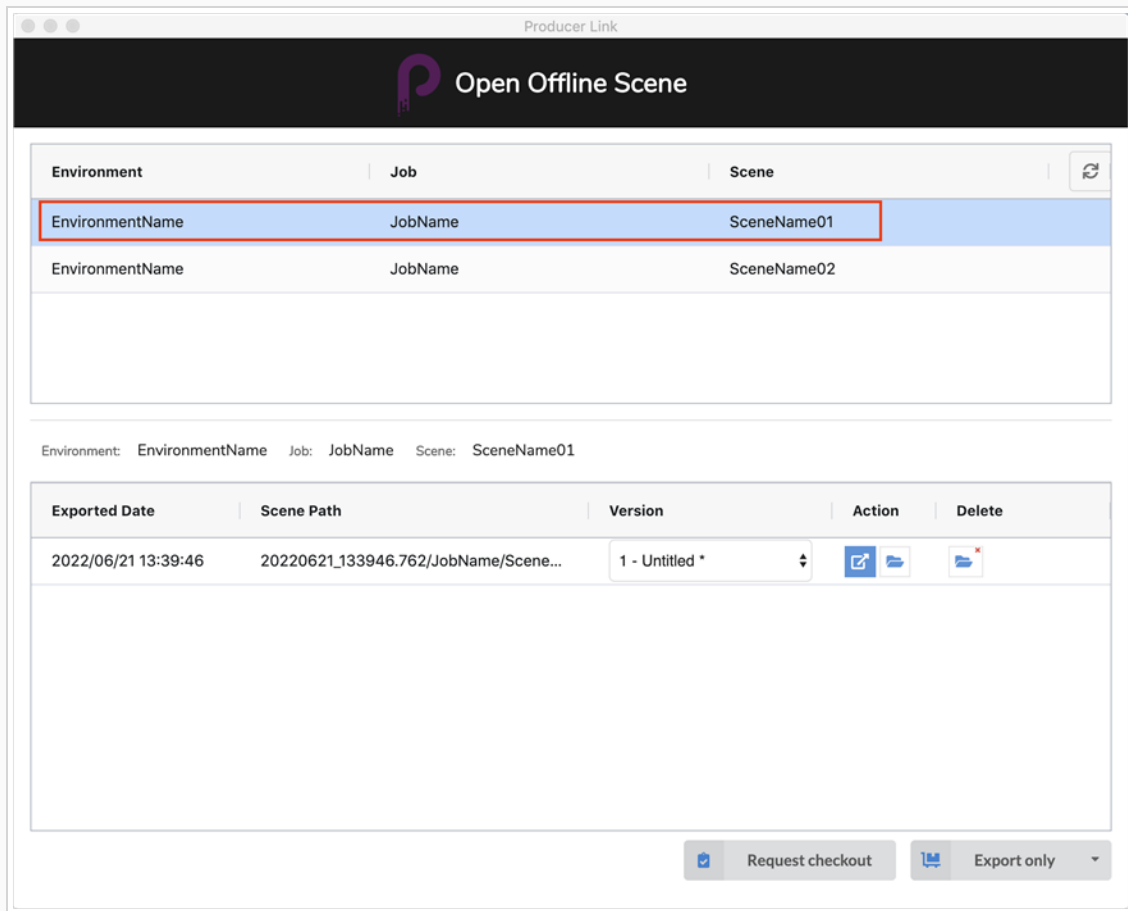
1. In the top section, click on the scene you want to check out.



2. Click on the Request checkout button.

Checking out a scene while making an export request at the same time

1. In the top section, click on the scene you want to export and check out.







Producer Link

Open Offline Scene

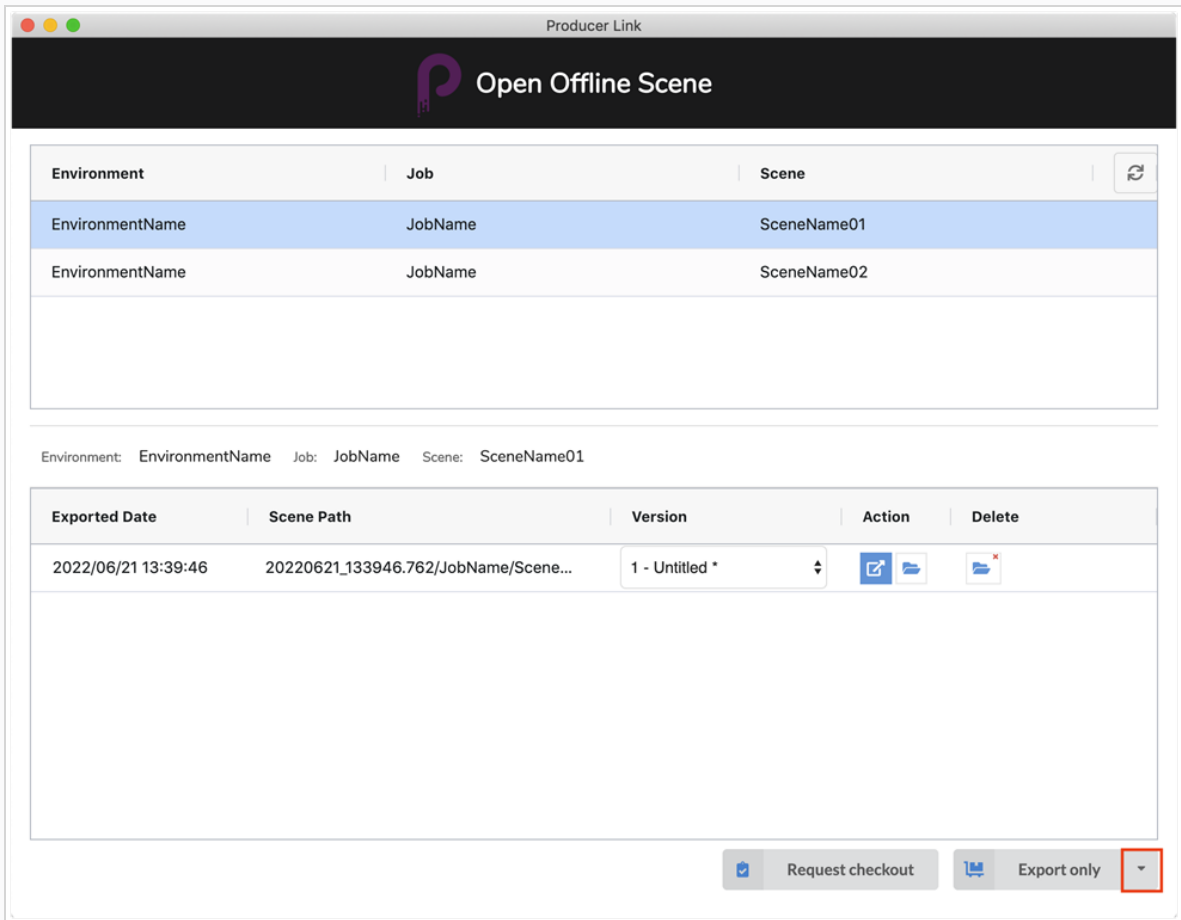
Environment	Job	Scene	
EnvironmentName	JobName	SceneName01	
EnvironmentName	JobName	SceneName02	

Environment: EnvironmentName Job: JobName Scene: SceneName01

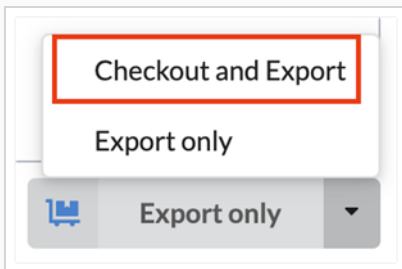
Exported Date	Scene Path	Version	Action	Delete
2022/06/21 13:39:46	20220621_133946.762/JobName/Scene...	1 - Untitled *		

 Request checkout  Export only ▾

2. Click on the downward arrow next to the Export only button to open the drop-down menu.




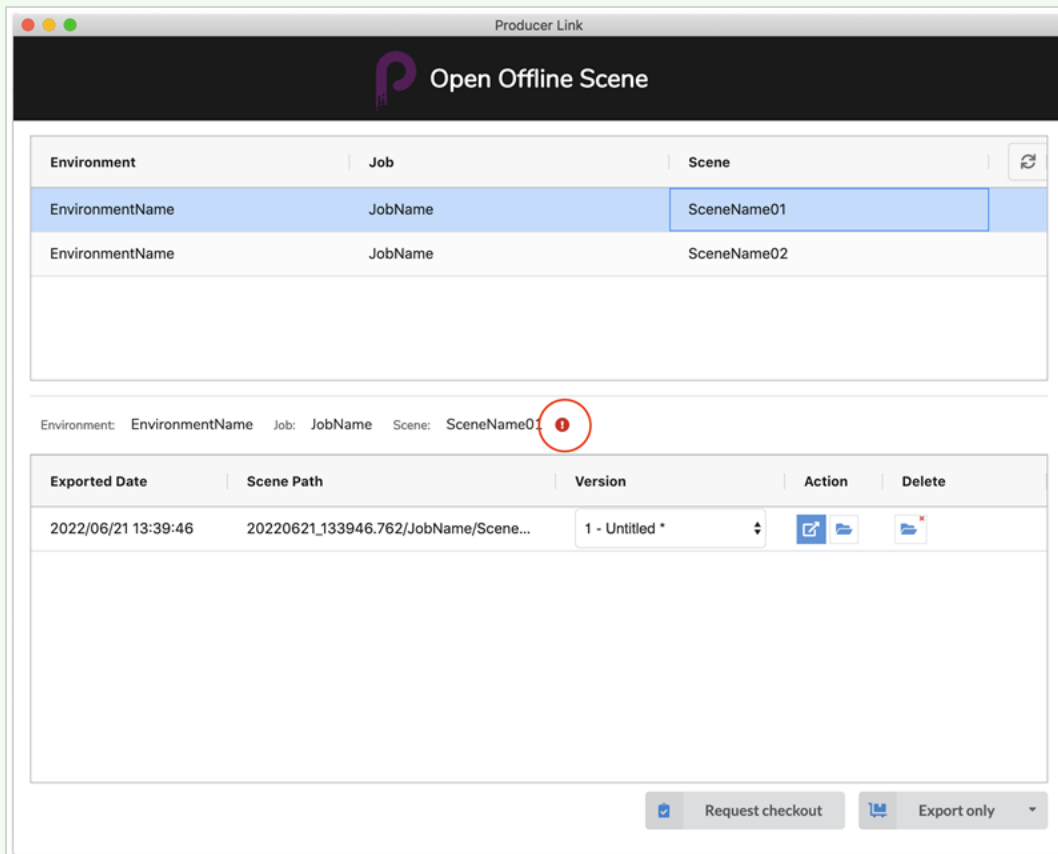
3. Select the Checkout and Export option.







NOTE
 You can change the default value of the Export button to be either “Export only” or “Check out and Export”. This can be done in Settings of Producer Link.



NOTE

If an error occurs while trying to check out the scene, a warning icon  will appear next to the scene name. Hover over the icon to display a more detailed error message.



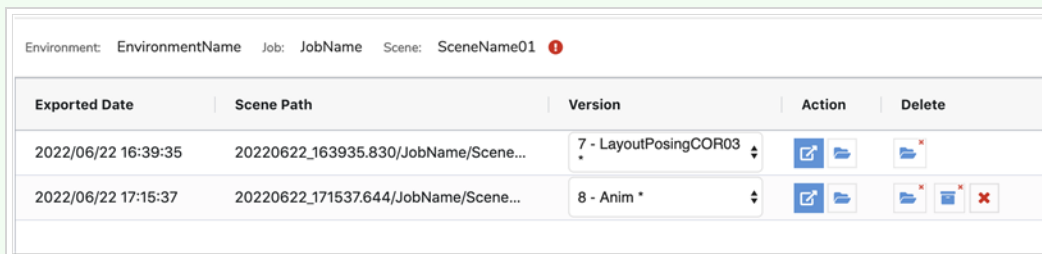
Environment: EnvironmentName Job: JobName Scene: SceneName01 


Exported Date	Scene Path	Version	Action	Delete
2022/06/21 13:39:46	20220621_133946.762/JobName/Scene...	1 - Untitled *	 	








 Request checkout  Export only

NOTE

If the scene was exported more than once, every export will be listed in the lower section. It will be important to look closely at the export date to ensure you are using the right one.




Environment: EnvironmentName Job: JobName Scene: SceneName01 

Exported Date	Scene Path	Version	Action	Delete
2022/06/22 16:39:35	20220622_163935.830/JobName/Scene...	7 - LayoutPosingCOR03	 	
2022/06/22 17:15:37	20220622_171537.644/JobName/Scene...	8 - Anim *	 	 


About the Open Offline Scene Dialog

The Open Offline Scene dialog of Producer Link reflects the exports made by the user. It makes it easy for the user to access all of his exported scenes and manage them while they are offline. Every scene version will be accessible for each scene.

Here is a description of all the areas of the dialog.

Icon	Name	Description
Exported Scene List		
	Environment	Environment name to which the scene belongs on the Harmony database.
	Job	Job name to which the scene belongs on the Harmony database.
	Scene	Exported scene name.
	Refresh	Lets the user refresh the contents of the exported scene list.
Selected Scene		
	Exported Date	Represents the date and time of the export from Producer. If there are more than one export made for the scene, the more recent one will appear on top of the list. The exported date is also used to define the name of the 7z file created from the export.

Icon	Name	Description
	Scene Path	Provides the path of the *.xstage file within the exported scene folder.
	Version	Lets the user select from a drop-down menu which scene version he wants to open. The latest version is displayed by default. The current version is marked by an asterisk (*).
	Open in Harmony	Lets the user open the scene in Harmony offline mode.
	Open Folder	Lets the user open the folder where the *.xstage file is.
	Delete Scene Folder	Deletes the unzipped folder.
	Delete 7z File	Deletes the *.7z file created from the export.
	Delete All	Deletes all files related to this scene.
	Request Checkout	Lets the user request a checkout for the selected scene and ensures that no one else can

Icon	Name	Description
		modify it until a check-in is done.
	Export Only	This button provides 2 different actions: Export Only: Lets the user request another export of the selected scene. Checkout and Export: Lets the user request another export and checkout the selected scene .

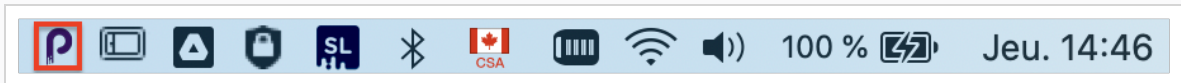
NOTE

The Open Offline Scene dialog cannot be loaded if the Open Scenes in Offline mode option is disabled. - See Configuring Producer Link.

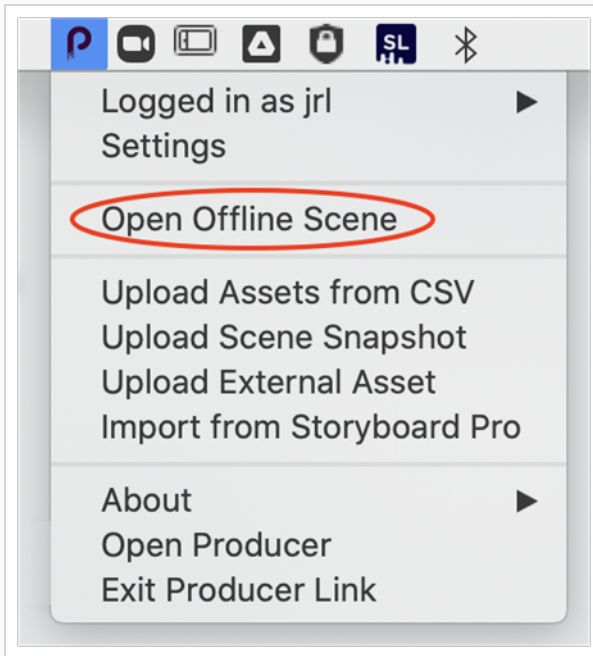
How to access the Open Offline Scene dialog from the Producer Link Icon

On MacOS:

1. In the top Status bar, right-click on the Producer Link icon.

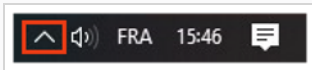


2. Select Open Offline Scene.



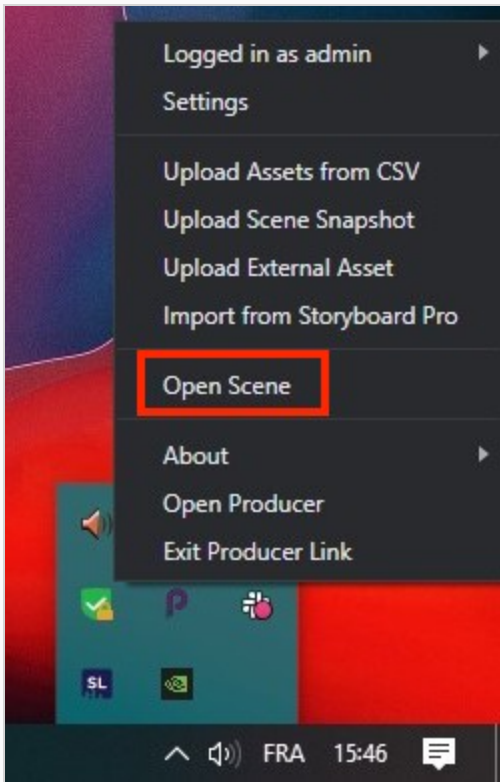
On Windows:

1. In the bottom Status bar, click on the arrow button to expand the list of available applications.



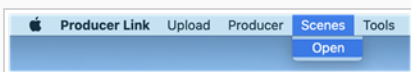
2. Right-click on the Producer Link icon.

3. Select the Open Scene.



How to access the Open Offline Scene dialog from the Producer Link top menu

1. In the Producer Link top menu, click on the Scenes menu
2. Click on Open

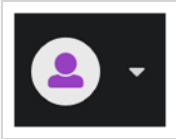


Uploading Work

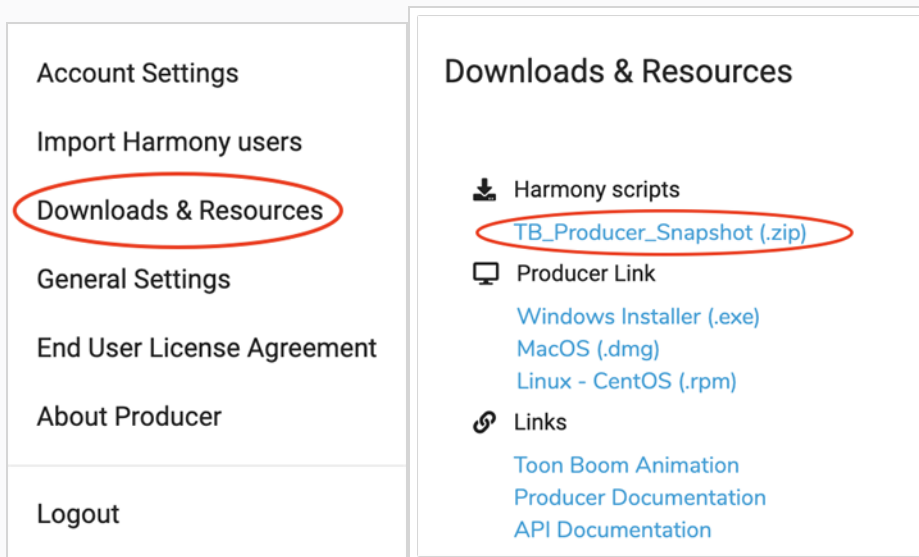
After you have completed the work you had to do on an offline scene, it is now time to render it, to submit it for approval, to log in the hours you spent on it and to push the result back to the server. Fortunately, all of these operations can be combined in one, using the Harmony snapshot scripts.

How to install the Harmony Scripts for Harmony Standalone

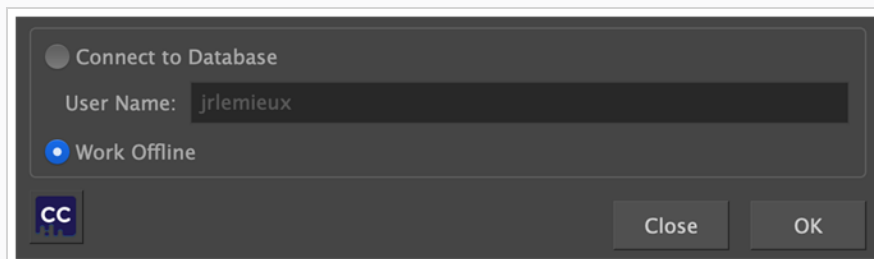
1. From Producer, click on the user dropdown at the Top Right of the black Menu bar.



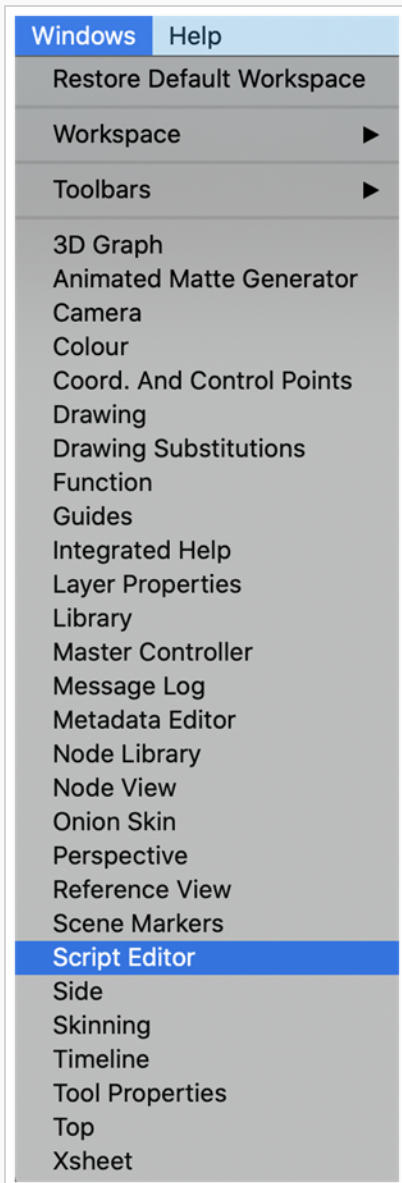
2. Download the scripts from the "Downloads and Resources" the Producer page.



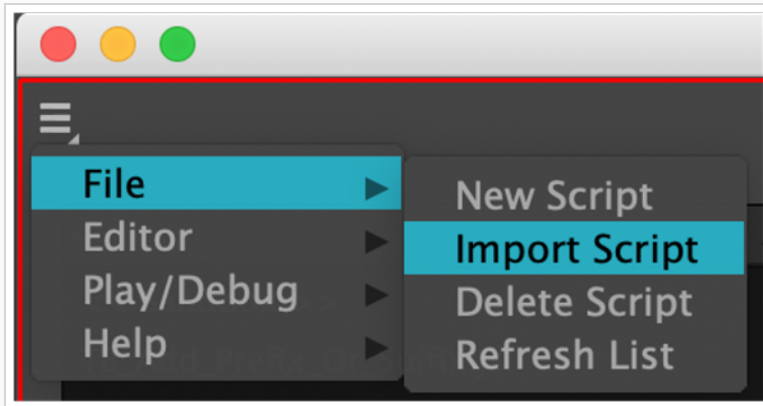
3. Double-click on the downloaded .zip to decompress it:
4. Open a Harmony scene offline to configure Harmony Standalone.



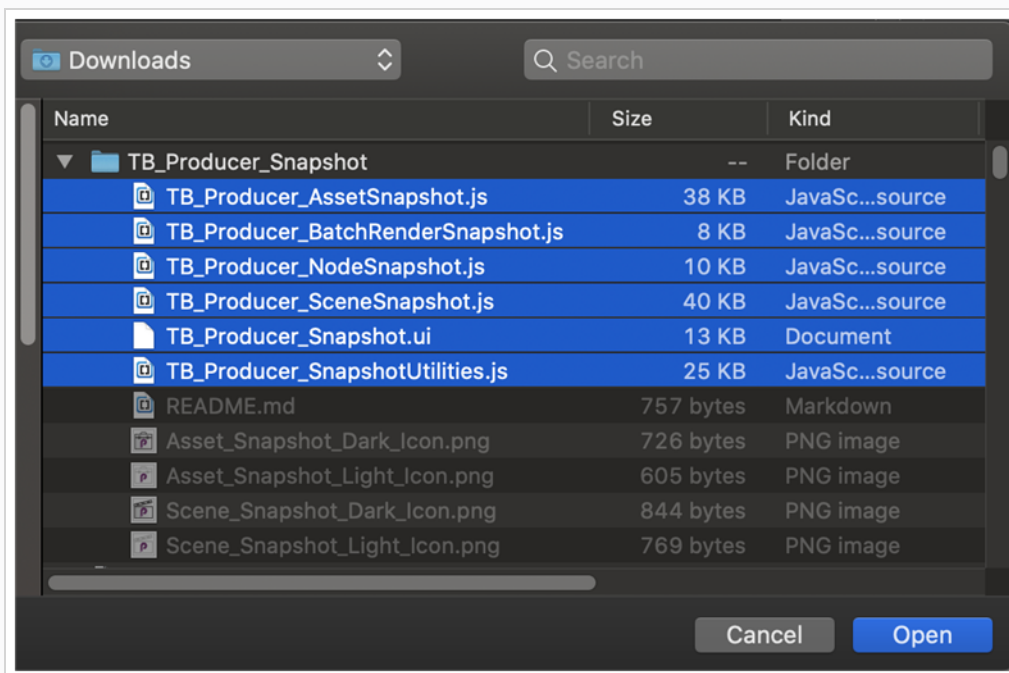
5. In Harmony, under "windows", open the "Script Editor".



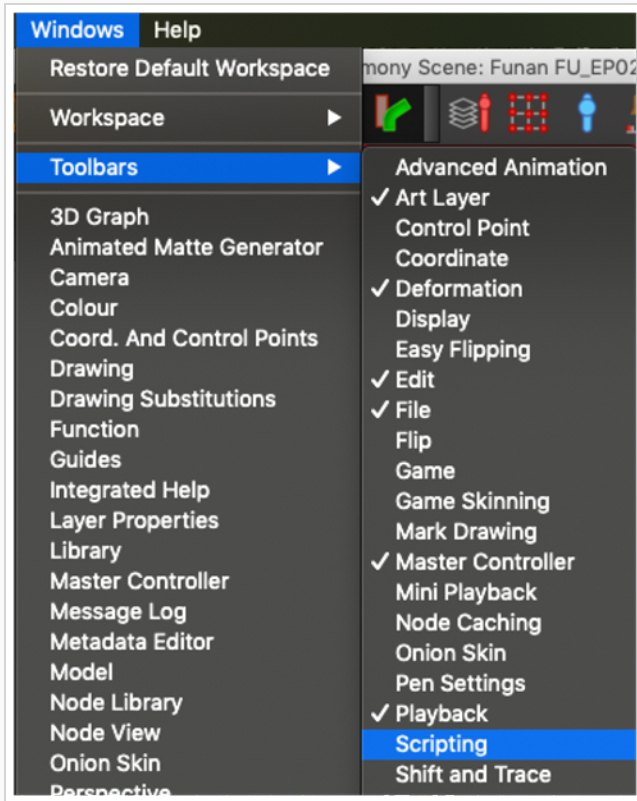
6. In the Script Editor menu (top left), go to File, Import Script:



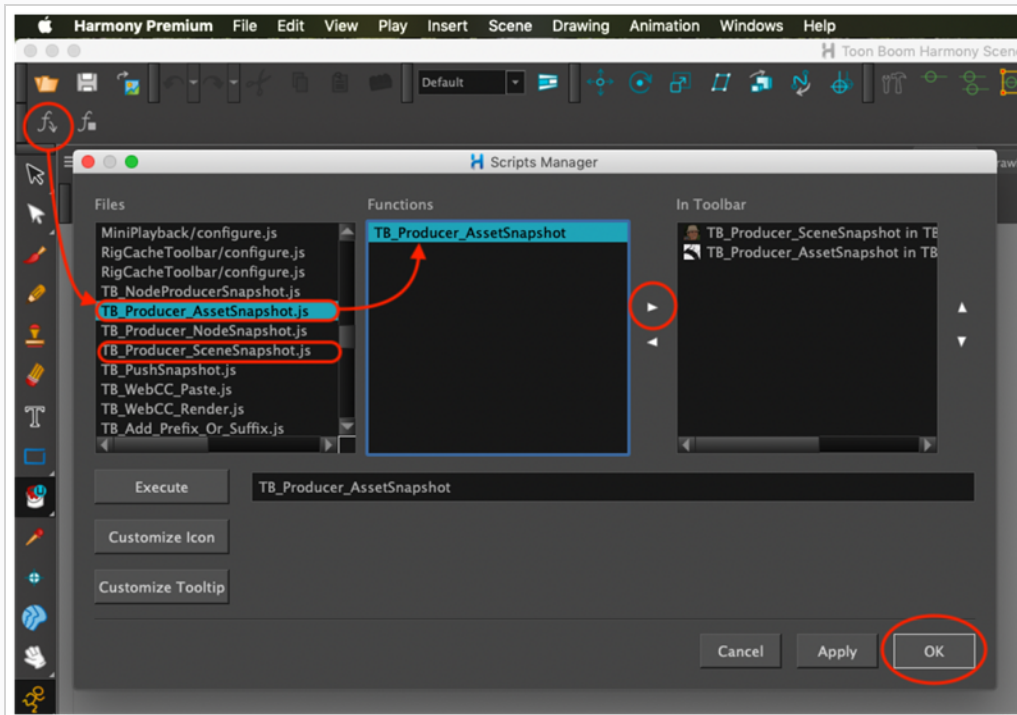
7. Browse to the decompressed scripts and import the six files.



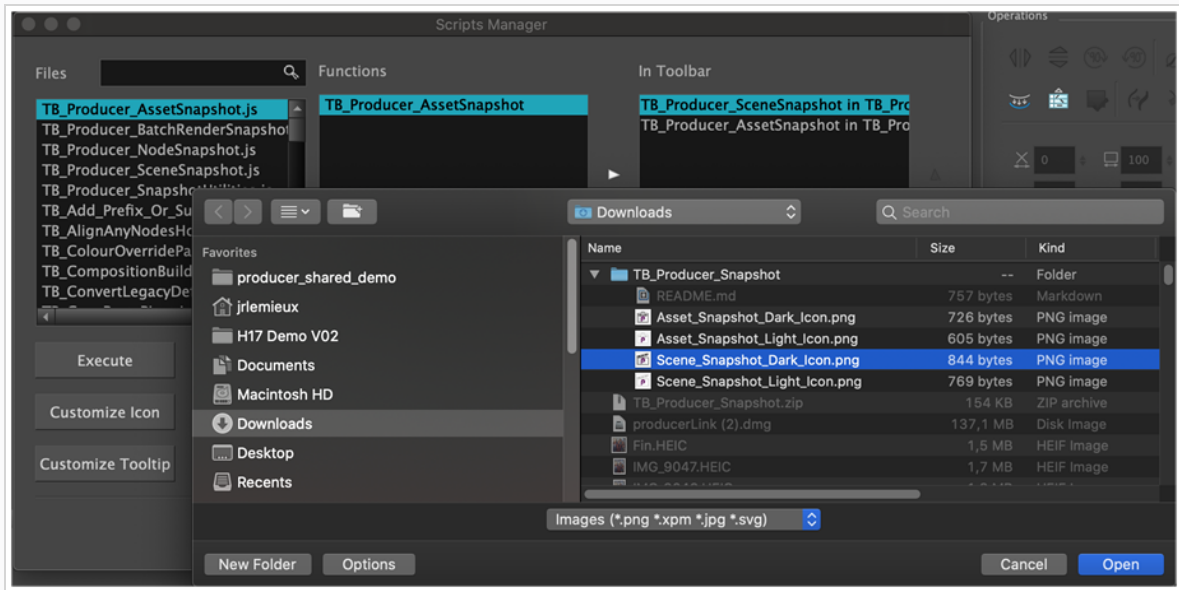
8. You should answer "User" six times to the question "Where would you like to save ...".
Then follow the procedure to add the scripts in Harmony:
9. Add the script toolbar.



10. Add the TB_Producer_SceneSnapshot & TB_Producer_AssetSnapshot scripts.



11. Using the “Customize Icon” feature, upload the provided icons to easily distinguish the two scripts.



12. The Scripts can now be launched from the Harmony Standalone by clicking on the appropriate icons.



How to update the Harmony Scripts for Harmony Standalone

If the Harmony scripts have to be updated, you can simply replace the old scripts with the latest ones. You should find the scripts to be replaced in the following location:

On Windows:

C:\Users\[username]\AppData\Roaming\Toon Boom Animation\Toon Boom
Harmony Premium\[version]-scripts

On MacOS:

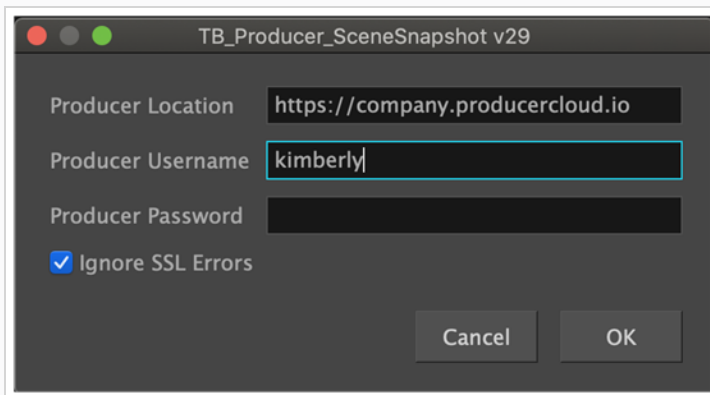
/Users/[username]/Library/Preferences/Toon Boom Animation/Toon
Boom Harmony Premium/[version]-scripts

How to upload work using the snapshot scripts

1. Launch the TB_Producer_SceneSnapshot.js script, using the SceneSnapshot icon.



2. If your script is not logged in, you will have to enter the address of your Producer Web, your username and password.



3. In the Section titled “Scene to Render and Upload”, validate the following scene information, starting with the Project.
 - Project
 - Environment
 - Job
 - Scene

TB_Producer_SceneSnapshot v29

Scene to Render and Upload

Project: Kuremensu

Environment: EnvironmentName

Job: JobName

Scene: SceneName01

Render and Upload Preview Movie to Producer

Select Process: Layout

Set Status to: Standby

Render Preview Movie at Half Resolution

Hours Worked Today (optional)

Hours:

Upload Scene to Harmony Database

Upload and Update Database Scene

Scene is not checked out

Keep the scene checked out

Checkin scene

Exchange: ucer/WebCCExchange

NOTE

If the selected project does not contain this scene, an error message will appear and every other field will be grayed out.



Pick the correct project from the dropdown list to resolve the issue.

4. In the Render and Upload Preview to Producer, set the following options:
 - Select Process
 - The snapshot of the scene you are uploading will be labeled as a snapshot of this process.
 - (Optional) Set Status
 - The Status of the selected Process will be set accordingly in Producer.

NOTE

The option available within the Select Process and Set Status to are defined in Producer by the workflow.

5. (Optional) Enter the amount of hours worked on that scene in that offline session.
6. (Only the first time) Set up the exchange folder path by clicking on the Change button.

NOTE

In the Exchange textfield, you must enter **/exchange_path/username**

The exchange path is the same as the one set up within the Settings page of Producer Link. - See Configuring Producer Link.

So, if the whole exchange folder was shared with you (ex: /Some/Path), you need to add your username: /Some/Path/username.

However, if only your specific user subfolder was shared with you (ex: /Some/Path/username), you can use it as such.

7. Check "Upload and Update Database Scene", to push your changes to the Harmony server.

Scene to Render and Upload

Project: Kuremensu

Environment: EnvironmentName

Job: JobName

Scene: SceneName01

Render and Upload Preview Movie to Producer

Select Process: Layout

Set Status to: Standby

Render Preview Movie at Half Resolution

Hours Worked Today (optional)

Hours:

Upload Scene to Harmony Database

Upload and Update Database Scene

Scene is not checked out

Keep the scene checked out

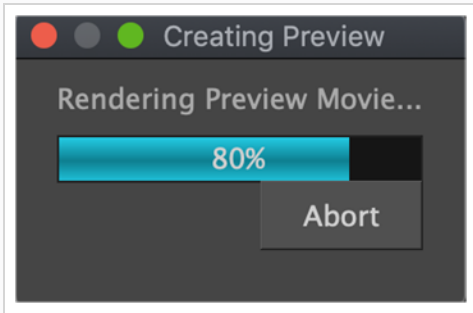
Checkin scene

Exchange: ucer/WebCCExchange Change

Logout Cancel OK

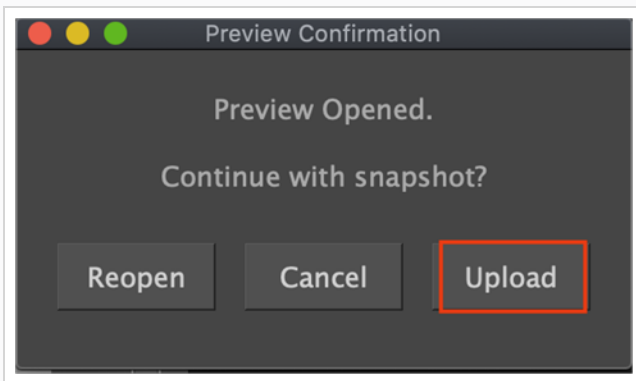
8. Click on the OK button.

The Create Preview progress bar appears.

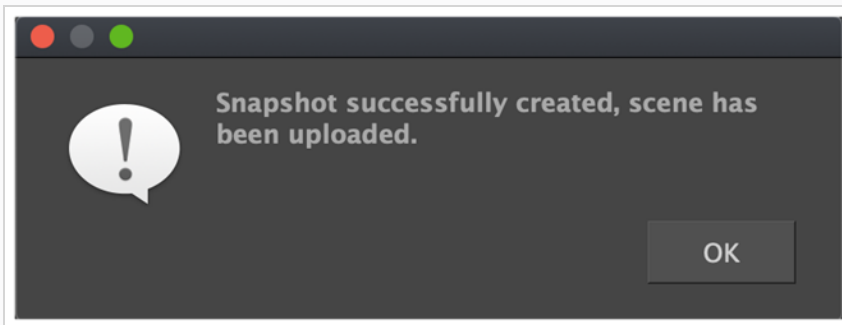


Once the render is completed, a movie preview opens and a dialog appears.

9. Click on the Upload to send the snapshot (preview) to Producer.



If the upload is successful, you will get a confirmation.



Updating Snapshot Scripts in Harmony

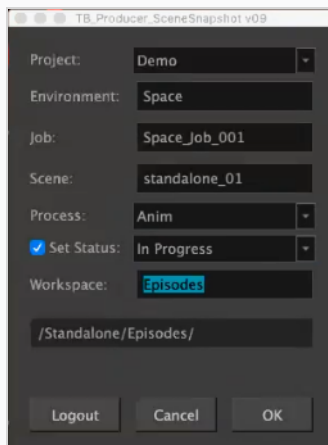
In Harmony you must install the snapshots scripts provided by Toon Boom. There will be two types of scripts to install. One is the Scene Snapshot scripts, they other is the Asset Snapshot scripts. The scripts allow Harmony to be connected to Producer.

How to upload a scene snapshot from your scene:

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

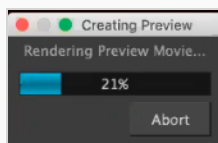
The TB_Producer_SceneSnapshot window opens.

2. Enter in the information for this scene. The first 4 fields are mapped to the Project > Environment > Job > Scene.



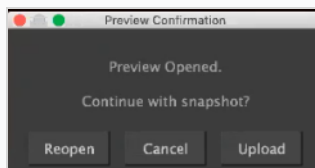
3. In the Process drop-down menu, select the process.
4. Set the process/task status that you wish to be updated in Producer.
5. Click **OK**.

The Create Preview progress bar appears.

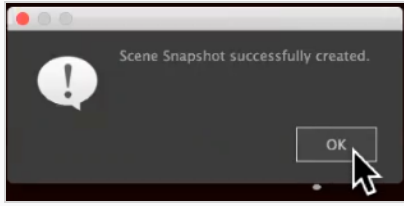


Once finished, the Preview Confirmation window opens.

6. Click **Upload** to send the snapshot (preview) to Producer.



Harmony lets you know that your preview has been successfully created.



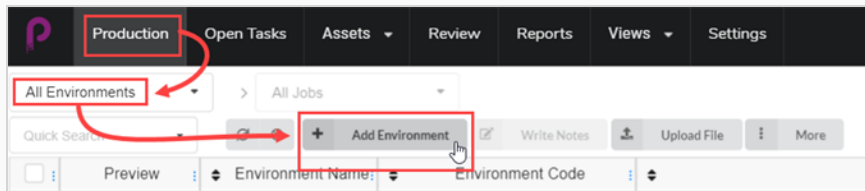
About Harmony Synchronization

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

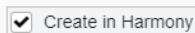
To create a new environment in Producer and add it to the Harmony server you must follow these steps:

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.

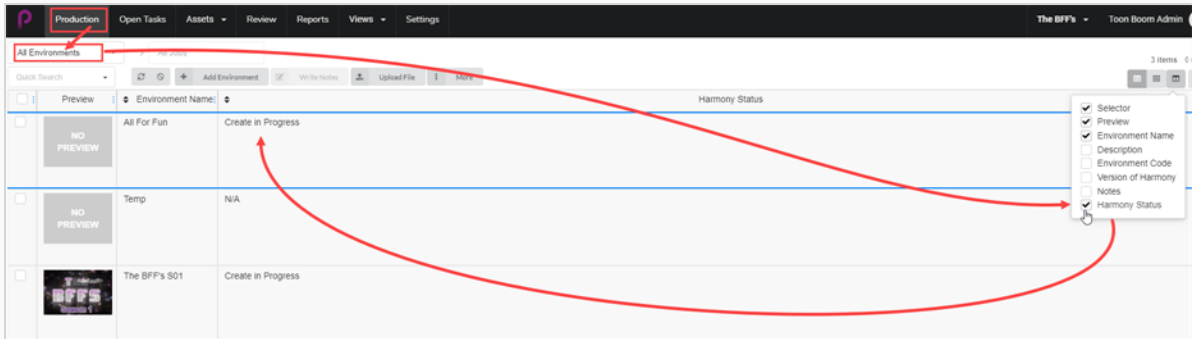



7. Click in the Environment field. The environment name is automatically regenerated. If there are spaces in the name, they will automatically be replaced by underscores. Harmony doesn't allow spaces in names.

 A screenshot of the 'Create Environment' dialog box. It has a 'Name' field with 'All For Fun' and a red arrow pointing to it with the text 'Create a name.'. Below is a 'Description' field. A checked 'Create in Harmony' checkbox is shown. Underneath, the 'Environment' field contains 'All_For_Fun' and the 'Version of Harmony' field is empty. A red box highlights the 'All_For_Fun' text. At the bottom, a red note states: 'Name is generated automatically. Harmony cannot have spaces in names, must use underscore. Producer will automatically use them in the name'. There are 'Cancel' and 'Create Environment >' buttons.

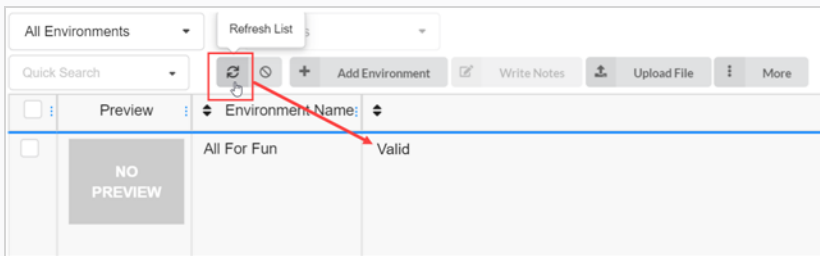
8. In the Version of Harmony field, you can optionally enter the version of Harmony being used.
9. In the Add a default thumbnail box, you can optionally drag and drop a file that will be used at the environment's Preview image. This can also be done at a later time.

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**.



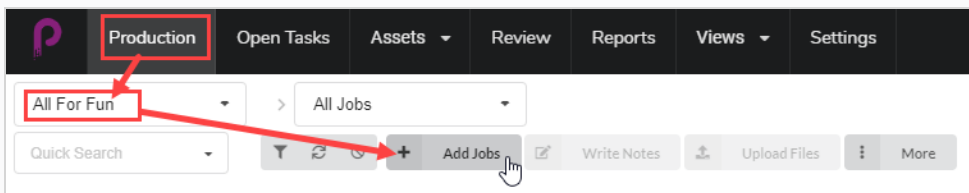
12. Go to the Column Selector  and check the Harmony Status box.
13. Hit the **Refresh** button.

The Harmony Status is updated to Valid. 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.

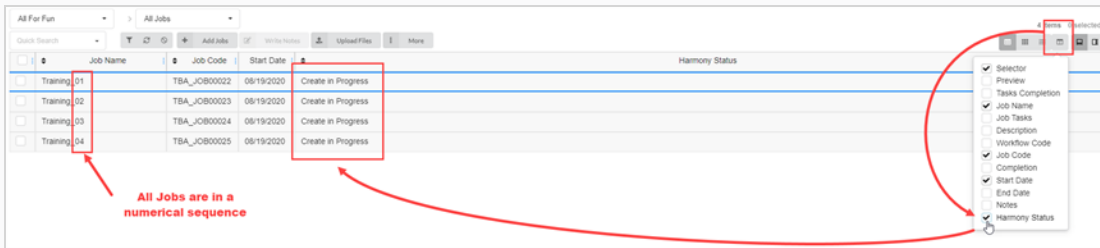
6. If you entered a value greater than one for the Number of jobs, in the Days between jobs field, enter the number of days you would like in the production schedule between jobs. This will affect the production schedule Gantt chart.
7. In the Name field, type in the name of the first job.

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.

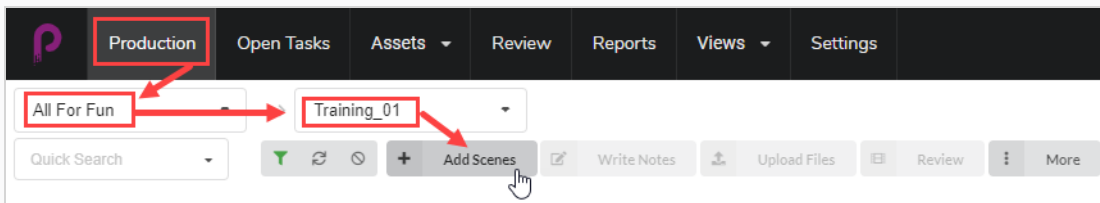


16. Hit the **Refresh** button.

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.

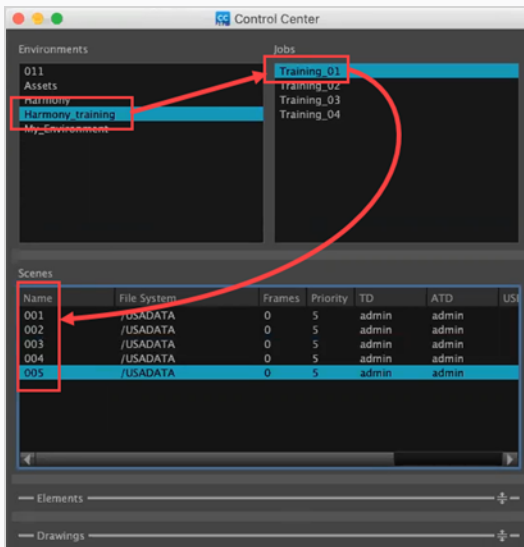
14. Click **Create Scene**.
The new Scene is sent to the render queue.
15. Go back to the Production page, selected environment and job.
16. If the Harmony Status column is not displayed, go to the Column Selector  and check the Harmony Status box.
The status indicates Create in Progress. All the scene 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

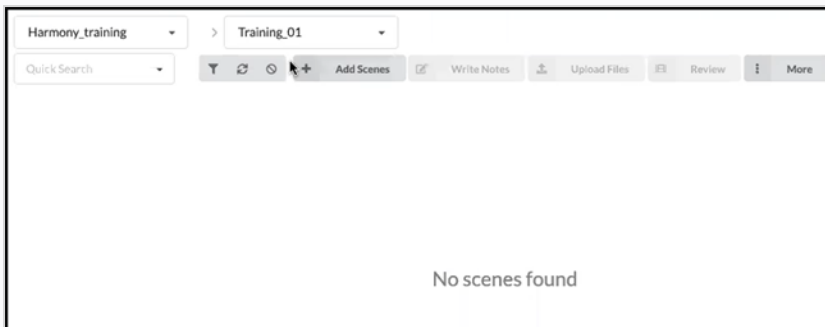
NOTE

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

1. In your Harmony Server, create your scenes.

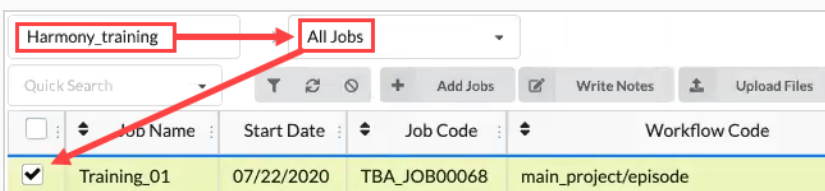


2. Once the scenes are created in Harmony, go back to Producer and in the main menu, select **Production**.
3. In the Environment and Job drop-down menus, select the environment and job you would like to populate with scenes created in Harmony.

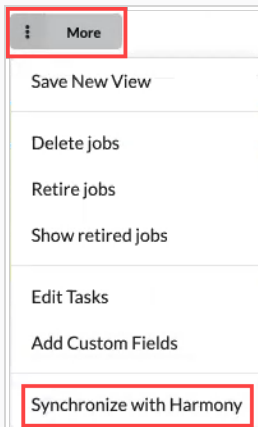


No scenes will be visible yet.

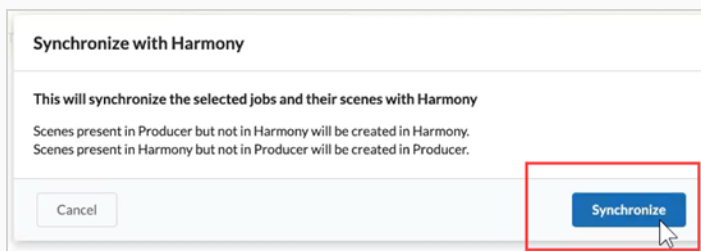
4. In the Jobs drop-down menu, select **All Jobs**.
5. From the list of jobs that appear, select the jobs for which created scenes in Harmony by checking their checkboxes.



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.

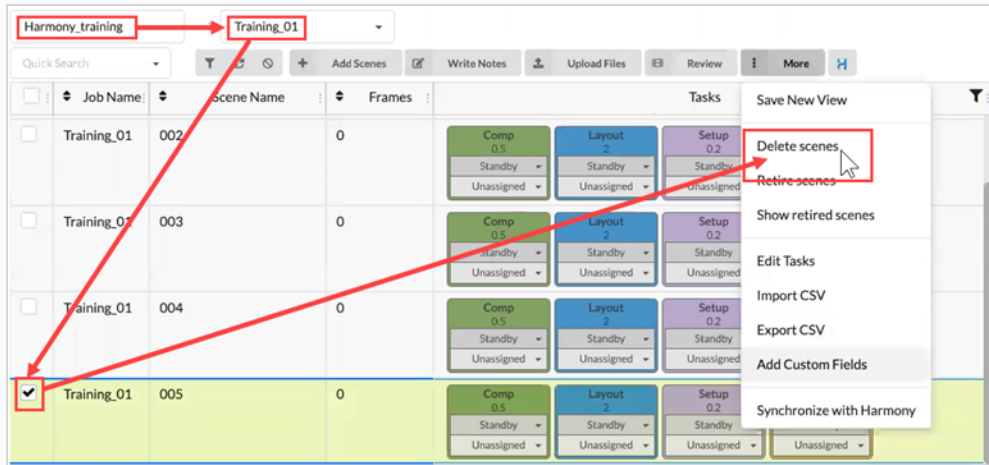
Harmony_training		Training_01						
Quick Search				Add Scenes	Write Notes	Upload Files	Review	More
Job Name	Scene Name	Frames	Tasks					
Training_01	001	0	Comp 0.5 Standby Unassigned	Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned		
Training_01	002	0	Comp 0.5 Standby Unassigned	Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned		
Training_01	003	0	Comp 0.5 Standby Unassigned	Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned		
Training_01	004	0	Comp 0.5 Standby Unassigned	Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned		

NOTE

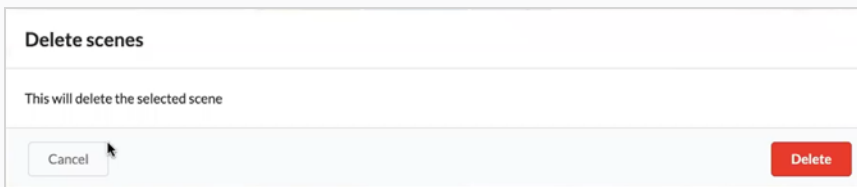
Syncing with Harmony will also update the frame counts to those set in Harmony.

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.

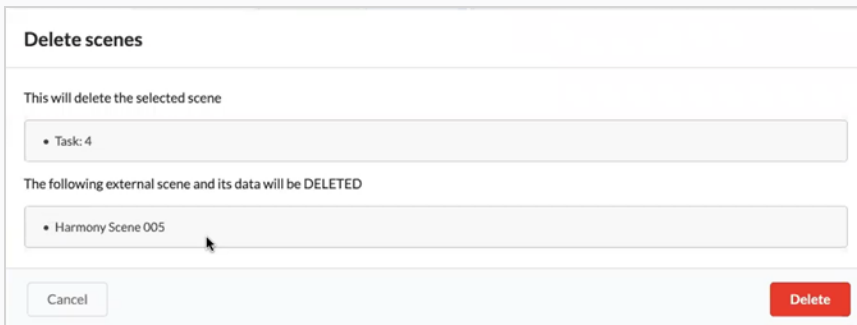


The Delete scenes dialog box opens.



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.

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

<p>Producer_Link</p>	<p>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.</p>
<p>cli_workspaces</p>	<p>Setup through Producer link, the file /Users/user_name/.producer/cli_workspaces has to reflect the local access path to folders storing assets.</p>
<p>workspaces.json</p>	<p>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.</p>
<p>TB_Producer_A AssetSnapshot.js</p>	<p>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)</p>
<p>WebCC</p>	<p>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.</p>

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 the PSD file).

The screenshot shows the 'Create Asset' dialog box. On the left, there is a 'Drop Files Here' area with a cloud icon and a button 'Add a default thumbnail'. The 'Name' field is filled with 'bg_02'. Below the name field, there are two radio button options: 'Harmony scene asset' (unchecked) and 'Harmony Standalone' (checked and circled in red). Underneath, there are two input fields: 'Workspace Id' with the value 'Assets' and 'Relative Path' with the value 'bg_02'.

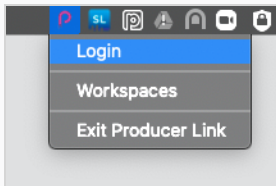
4. Check the **Harmony Standalone** option box.
5. In the Workspace ID field, specify the workspace ID—see [About Sending Assets to Harmony \(Baking\)](#).
6. In the Relative Path field, enter the end of the path extension. The relative path relates to where the asset is located within the workspace.
7. In the Workflow drop-down menu, specify the workflow by choosing one from the list.

The screenshot shows the 'Add Asset' dialog box. At the top, there are three dropdown menus: 'Type' set to 'Image', 'Category' set to 'Bg', and 'Workflow' set to 'Background'. Below these is a 'Tags' section with an 'Add tags' dropdown. The 'Assembly' section contains two 'Environment' dropdown menus, both set to 'Select an environment'. At the bottom right, there is a blue 'Add asset >' button with a red arrow pointing to it.

8. Click on the **Add Asset** button.
The PSD file is now available in Harmony.

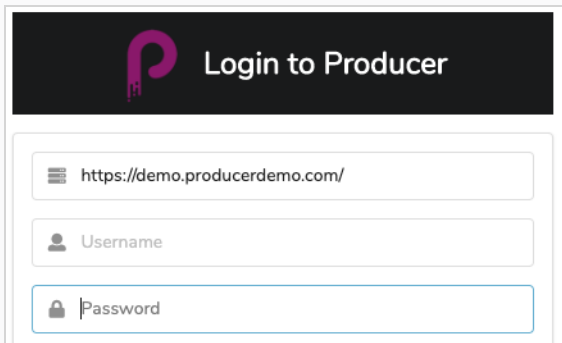
How to create a snapshot and add a preview image of the PSD

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

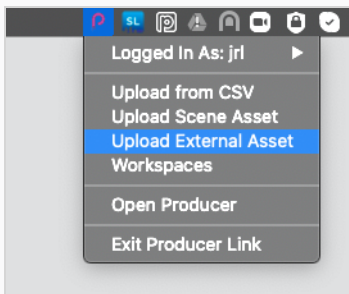


The Login to Producer dialog box appears.

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.

External Asset Upload

Project: test

Asset Name: bg_02

Process: BG_Final_Check

Source: Choose or Drop External Asset File. Choisir un fichier bg_02.psd

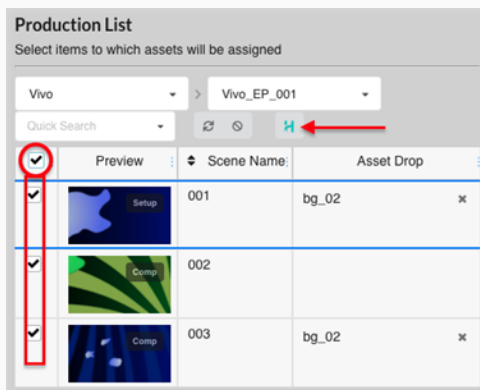
Preview: Choose or Drop Preview File. Choisir un fichier bg_02.jpg

Create Snapshot

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.



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 [Creating Assets](#).

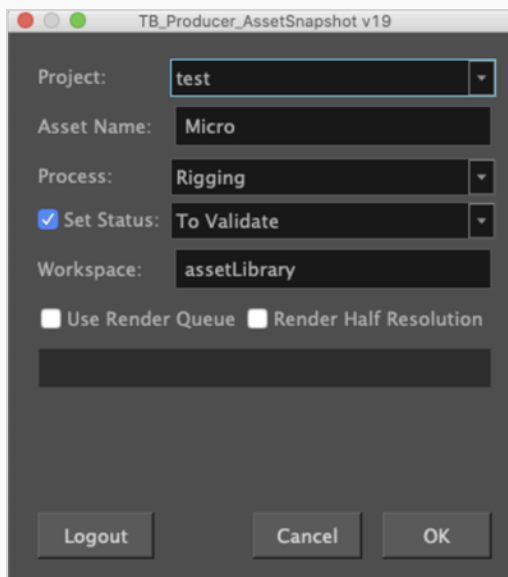
This creates a new asset in Producer and a new scene in Harmony that will be used to build this asset.

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.

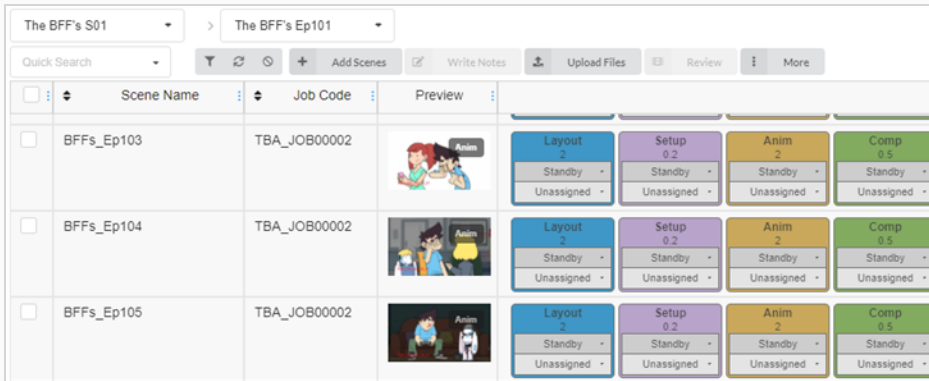
Creating a Temporary Review Session

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.



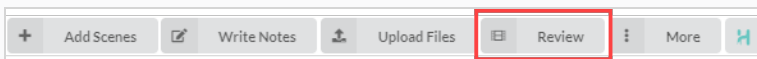
2. In the far-left column, enable the checkbox for each scene that you want to review.

NOTE

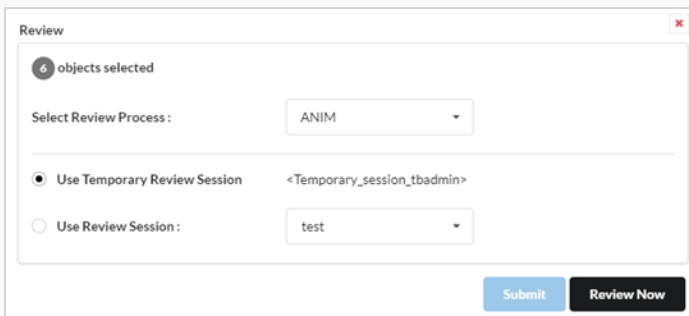
You can only review scenes that have a playable movie preview. Scenes with a movie preview will have a thumbnail and a Play button underneath their thumbnail.



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



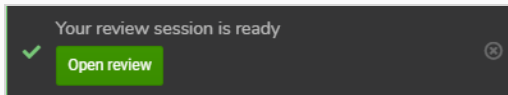
The Review dialog box opens.



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.

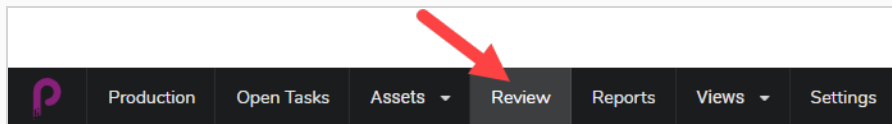


Creating a Permanent Review Session

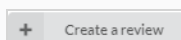
You can create a review session from the Review page, then populate it with scenes from the Production page. You can create as many permanent review sessions as needed.

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**.

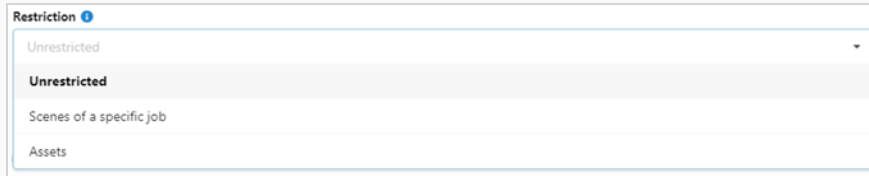


The Create a Review dialog box opens.

A screenshot of the 'Create a review' dialog box. It contains the following fields and controls:

- Name**: A text input field with a red asterisk and placeholder text 'Name of the review'.
- Assignee**: A dropdown menu with 'Assignee' selected.
- Restriction**: A dropdown menu with 'Unrestricted' selected and an information icon.
- Date**: A date input field with '2020-08-14' and a calendar icon.
- External review**: A toggle switch that is currently turned off.
- Buttons**: 'Cancel' and 'Add' (with a checkmark icon).

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

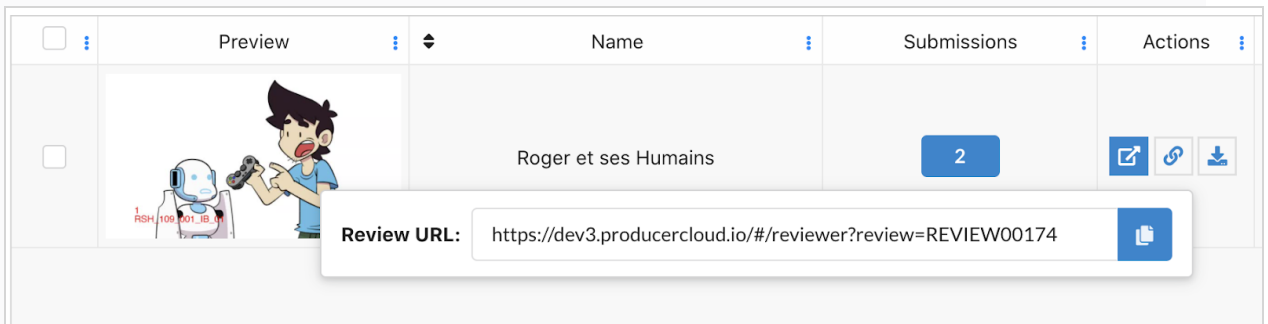
Once your session is created, you must add scenes to it.

Sharing Review Session

After a review session has been created, you may want someone else to access it specifically. To do this, you will need to make sure the recipient has access to Producer. Please see section on [Creating Users](#).

How to share a review session

1. In the Review List, under the of the Actions column, click icon to generate a Review URL for the corresponding review session.
2. Click on the blue Copy icon to copy the displayed URL to the clipboard.
3. Send that URL to the remote user whom you would like to review this session.



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.

The BFF's S01		> The BFF's Ep101							
Quick Search				+	Add Scenes	Write Notes	Upload Files	Review	More
<input type="checkbox"/>	Scene Name	Job Code	Preview	Layout	Setup	Anim	Comp		
<input type="checkbox"/>	BFFs_Ep101	TBA_JOB00002		Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned	Comp 0.5 Standby Unassigned		
<input type="checkbox"/>	BFFs_Ep102	TBA_JOB00002		Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned	Comp 0.5 Standby Unassigned		
<input type="checkbox"/>	BFFs_Ep103	TBA_JOB00002		Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned	Comp 0.5 Standby Unassigned		
<input type="checkbox"/>	BFFs_Ep104	TBA_JOB00002		Layout 2 Standby Unassigned	Setup 0.2 Standby Unassigned	Anim 2 Standby Unassigned	Comp 0.5 Standby Unassigned		

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**.

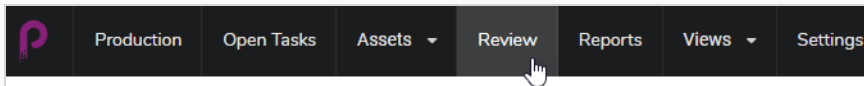
A notification appears in the bottom-right corner of the page indicating that the session is being updated. When the notification disappears, the session is ready for review.


Filtering a Review Session

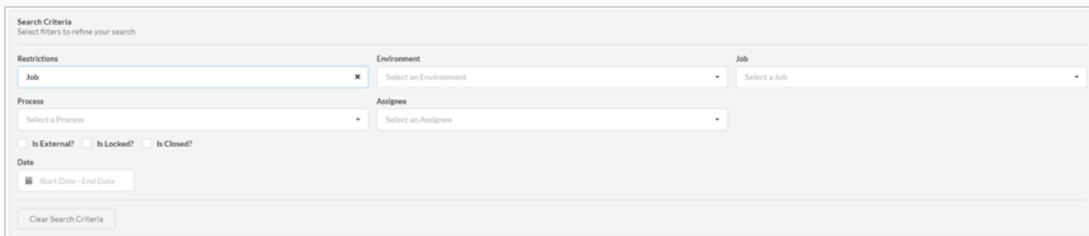
If you have a lot of review sessions and you need to find a specific one, you can filter the sessions in the list using keywords from their descriptions. You can also choose to only view sessions of a certain type, or sessions within a specific range of dates.

How to filter sessions

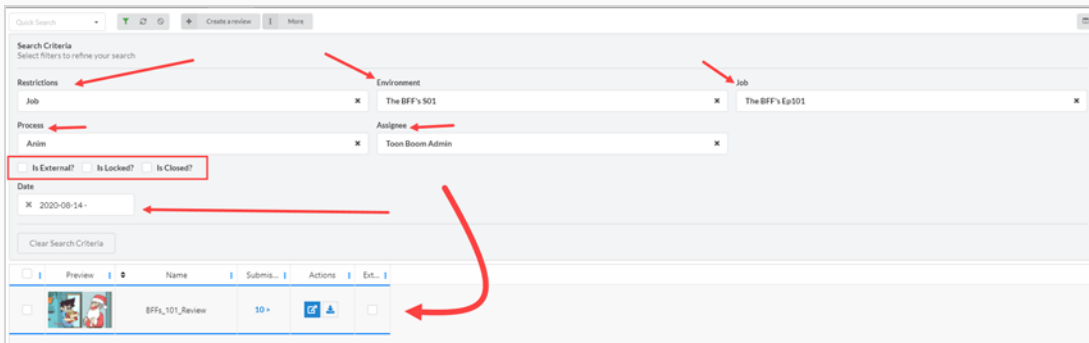
1. In the top menu, click **Review**.



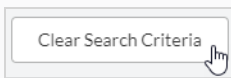
2. In the Review page, click the Toggle Search Panel  button at the top right of the page. The Search Criteria panel opens.



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.



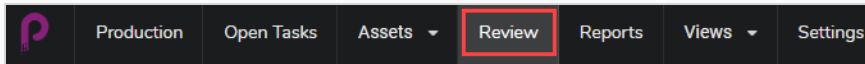
All of the sessions are displayed in the session list.

Editing a Review Session

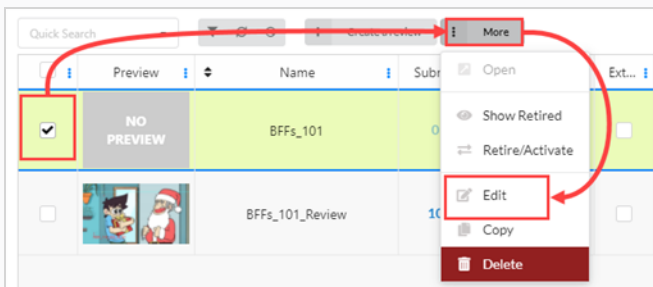
Once a session is created, you can edit its name, assignee, restriction, date and if the review is external.

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.

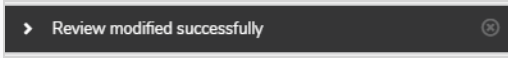
 A screenshot of the 'Edit review' form. It has a title 'Edit review' with an edit icon. The form contains the following fields:

- Name**: A text input field containing 'BFFs_101'.
- Assignee**: A dropdown menu with 'Assignee' selected.
- Restriction**: A dropdown menu with 'Unrestricted' selected.
- Date**: A date picker field showing '2020-08-14'.
- Three checkboxes: 'External review', 'Locked review', and 'Closed review', all of which are currently unchecked.

 At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Edit' on the right.

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.



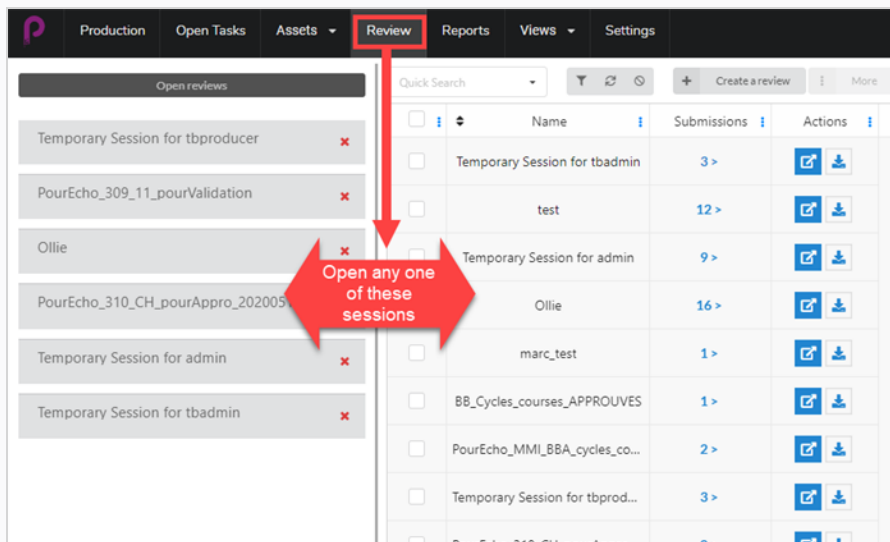
Opening a Review Session

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.

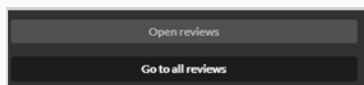
You can open multiple review sessions at once. Each session you open will appear in the Open reviews panel at the far left of the page.

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.

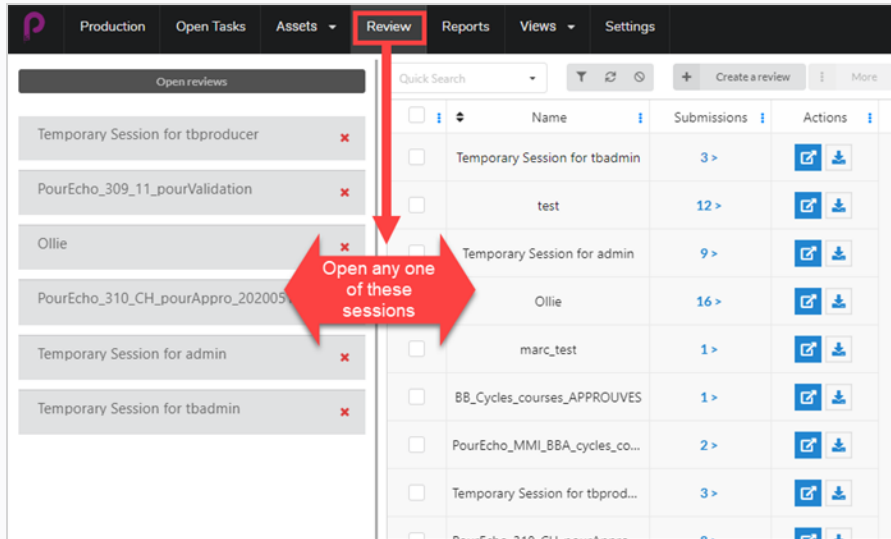
Returning to the Session List and Switching Sessions

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

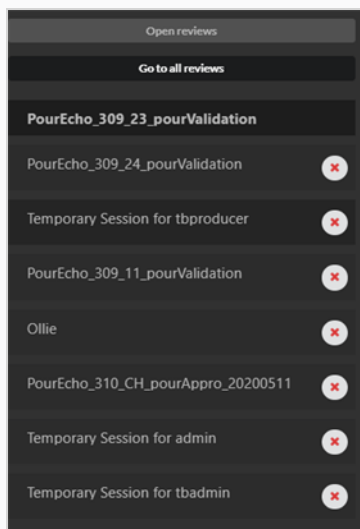
How to return to the session list

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

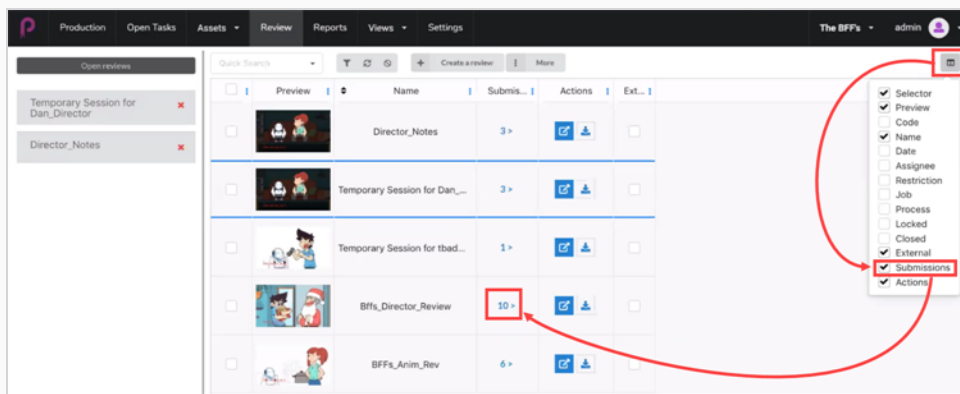
1. Make sure you are in the review session list to edit.
2. Select **Go To All Reviews**.
3. In the Column Selector on the far right, make sure that the Submission column is checked.

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.

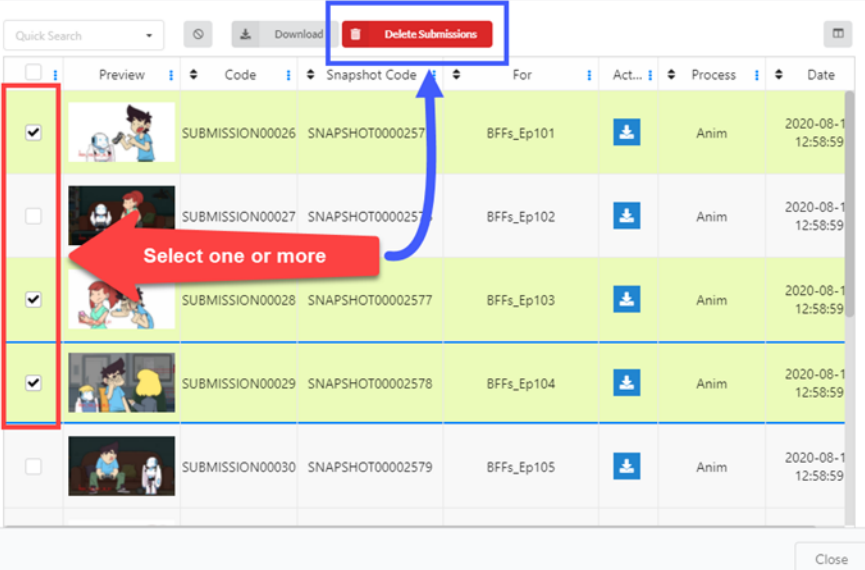
5. Select one or more you wish to delete and then click **Delete Submissions**.

☰ Submissions for Bffs_Director_Review [REVIEW00007]

Quick Search [] [] Download [] Delete Submissions []

<input type="checkbox"/>	Preview	Code	Snapshot Code	For	Act...	Process	Date
<input checked="" type="checkbox"/>		SUBMISSION00026	SNAPSHOT0000257	BFFs_Ep101		Anim	2020-08-1 12:58:59
<input type="checkbox"/>		SUBMISSION00027	SNAPSHOT0000257	BFFs_Ep102		Anim	2020-08-1 12:58:59
<input checked="" type="checkbox"/>		SUBMISSION00028	SNAPSHOT00002577	BFFs_Ep103		Anim	2020-08-1 12:58:59
<input checked="" type="checkbox"/>		SUBMISSION00029	SNAPSHOT00002578	BFFs_Ep104		Anim	2020-08-1 12:58:59
<input type="checkbox"/>		SUBMISSION00030	SNAPSHOT00002579	BFFs_Ep105		Anim	2020-08-1 12:58:59

Close



NOTE

This will not delete the scene from Producer.

Deleting a Review Session

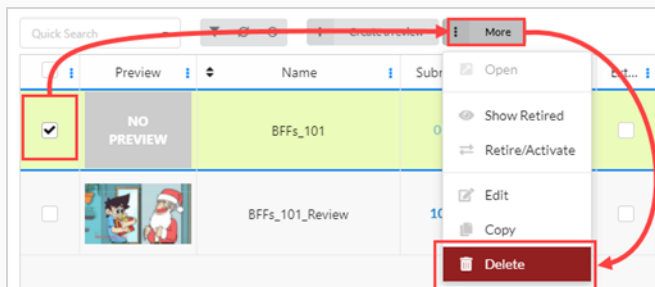
Deleting a session will permanently erase it and it will not be accessible again.

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.

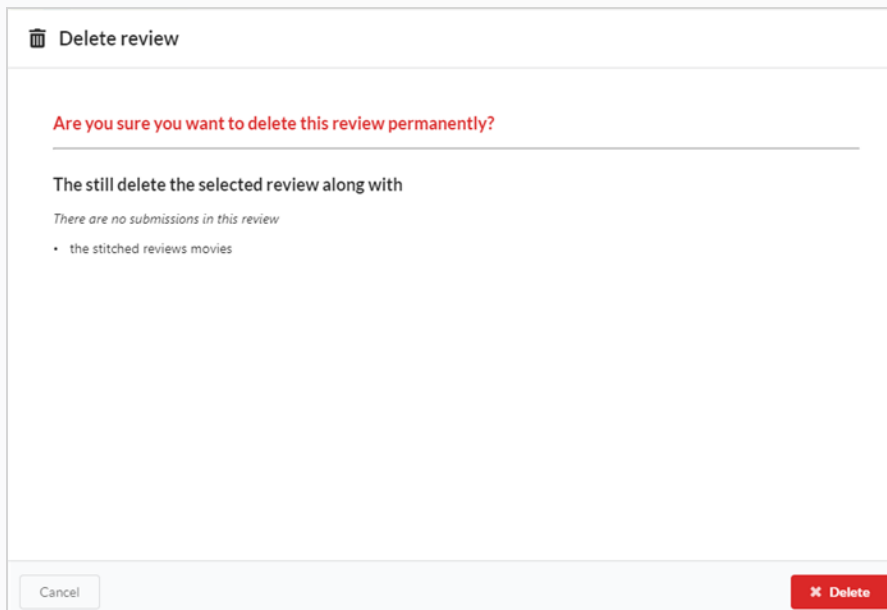
How to delete review sessions

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.

▶ Review deleted successfully 

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 Review Session

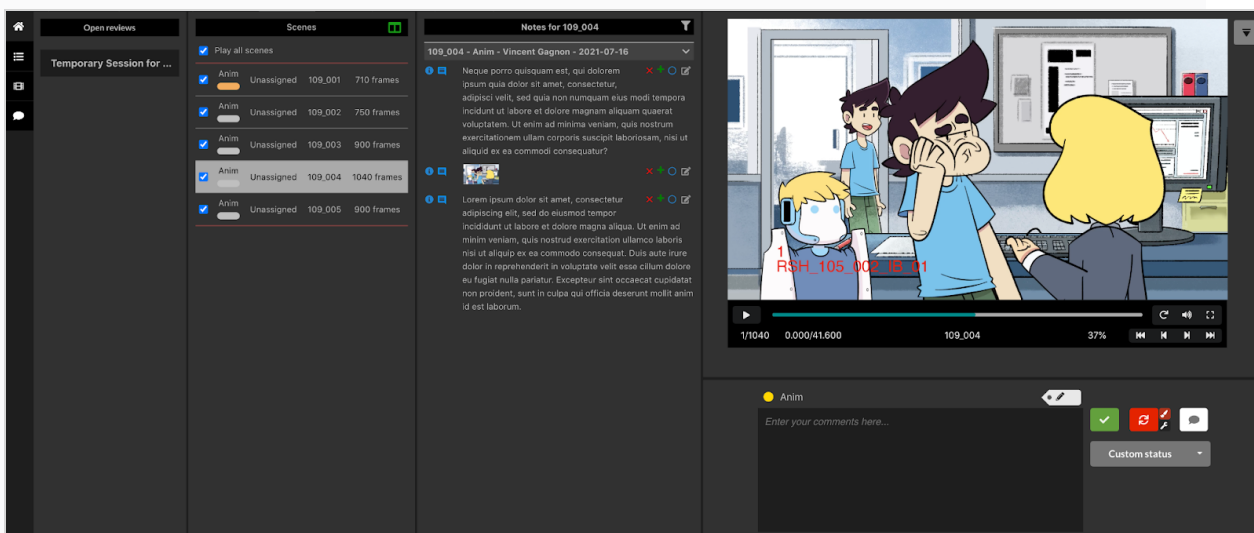
Notes can be added to scenes in a review session to make comments and suggestions, request corrections, point out details or otherwise communicate important information about a scene to project collaborators.

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.



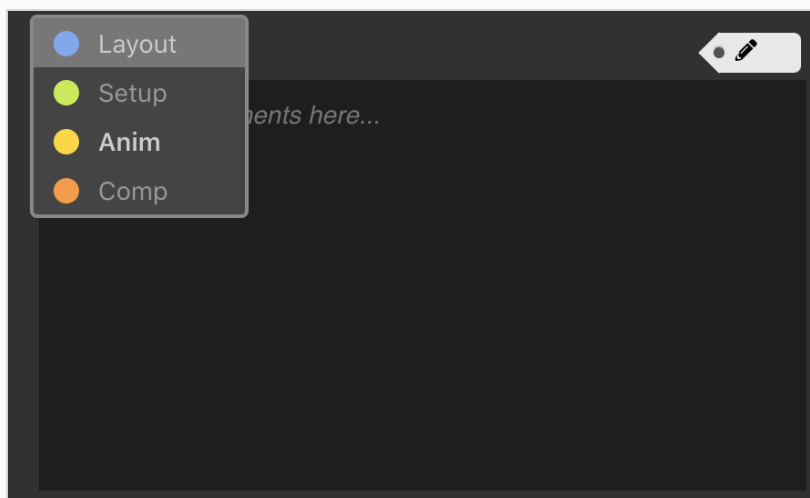
2. In the Scenes column, select the scene to which you want to add a note or scroll horizontally in the Timeline below the preview area, select the exact frame where you want to add a comment.

Scenes				
<input checked="" type="checkbox"/>	Play all scenes			
<input checked="" type="checkbox"/>	BFFs_Ep103		900 frames	36.000 sec
<input checked="" type="checkbox"/>	BFFs_Ep104		1040 frames	41.704 sec
<input checked="" type="checkbox"/>	BFFs_Ep105		900 frames	36.131 sec
<input checked="" type="checkbox"/>	BFFs_Ep106		600 frames	24.103 sec

3. If you want to leave a note for a different process than the pre-selected process of this review, select a new process by clicking on the coloured pill, above the comment box, on the left.

NOTE

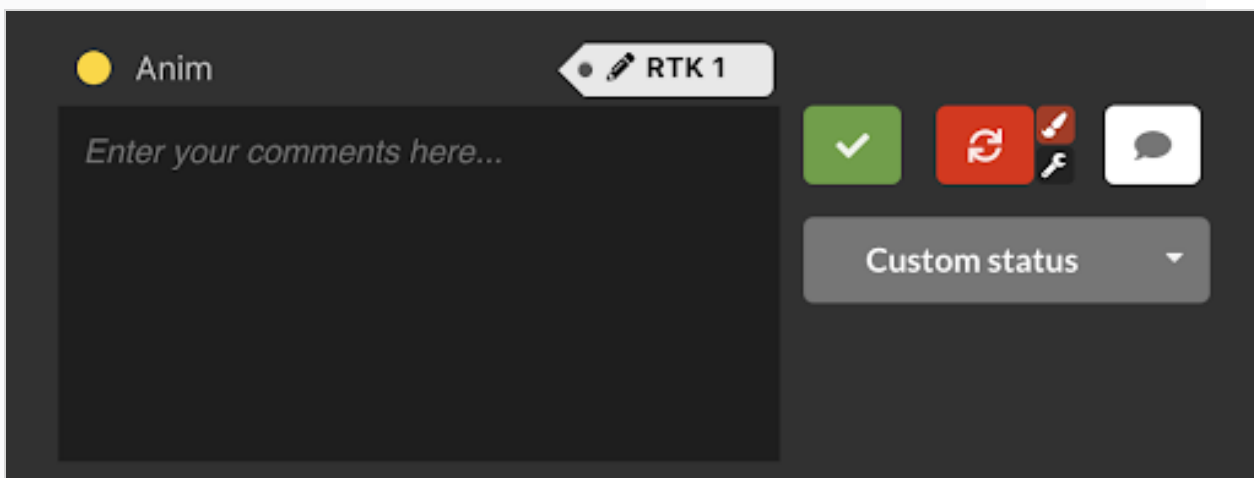
This step is OPTIONAL.







4. On the top right of the comment box, you may want to edit the “Note Tag”. This tag allows you to later arrange notes per review session. For example, all of today’s review sessions notes can be tagged with “Retake 1”.



5. Type your note in the comment box.



There are 4 options to register your comment:



-  **Approve Scene:** Sets the scene review process to Approved in Producer and logs your comment with the approval.
-  **Save Note as a Comment:** Your note will appear as a comment in the context of the current process.
-  **Revise Note:** This will set the scene review process to Retake (or Revise) and will save your note as the explanation.
 - Optional: You can check the brush to mark an “Artistic Retake” or the wrench to mark a “Technical Retake” (or both).
-  **Set a Custom Status:** Select a custom status using the down arrow. Once the desired status is displayed, click on it to set the review process of the scene to this status and save your comment along.

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.

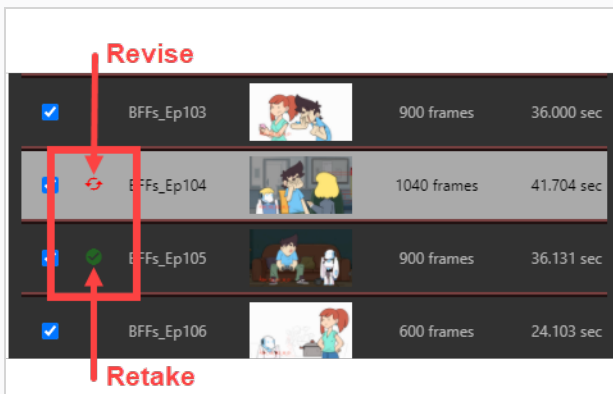
4. In the top right, click the Display drawing toolbar  button.
The drawing toolbar appears.
5. You can use the following tools in the drawing toolbar to draw over the frame:
 - Use the Pen  tool to draw on the frame.
 - Use the Arrow  tool to draw arrows.
 - Use the Box  tool to draw rectangles and 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.

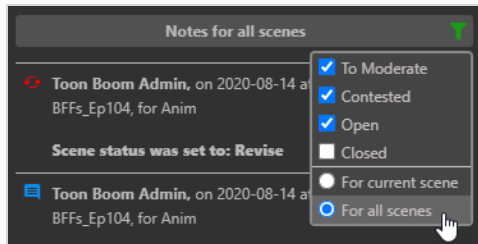
The approval note appears in the Notes column. In the Scenes column, a green checkmark appears on the left of the scene.

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.

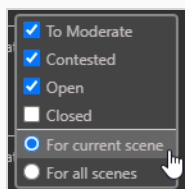


- Click the title of the Notes list.

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.

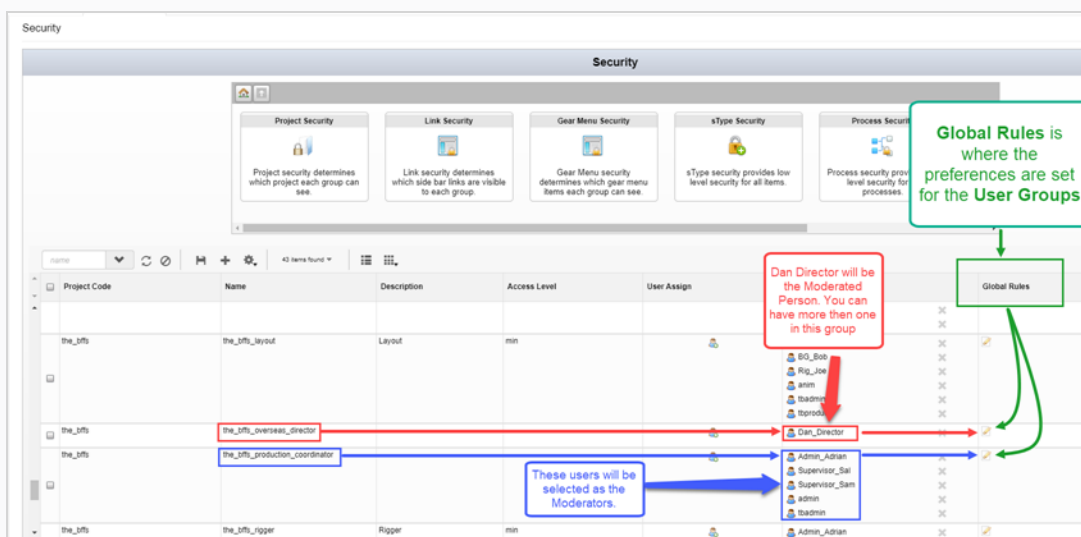
Moderating Notes



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.

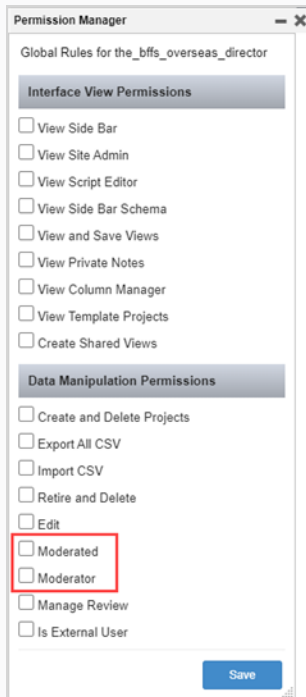
Once the Moderators and the Moderated are in place, notes from the moderated will have to be screened by the moderators of the production.

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**.

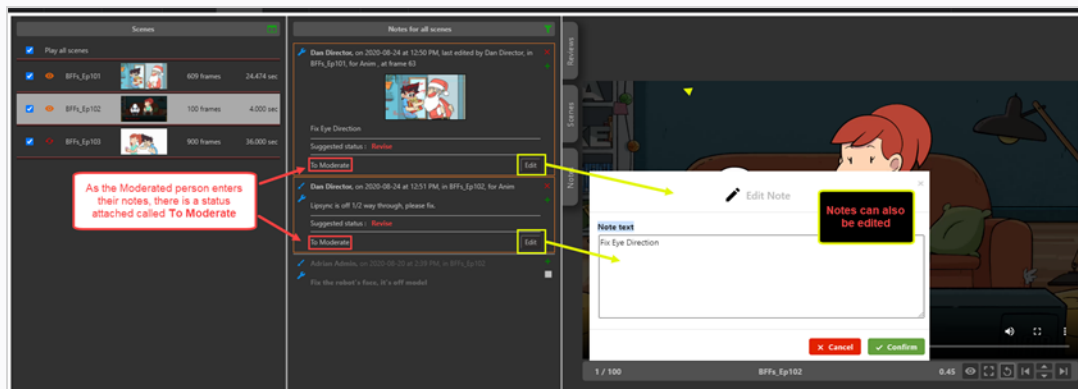


3. Find the group in the production you wish to be the Moderator or the Moderated.
4. If you need to add or subtract names from those groups, in the User Assign tab, select the User  icon .
The Assign Users to Group dialog box opens.
5. Use the check box to add or remove users from the associated group, then click **Save**.
6. In the Global Rules column, select the Edit  icon.
The Permissions Manager dialog box opens.

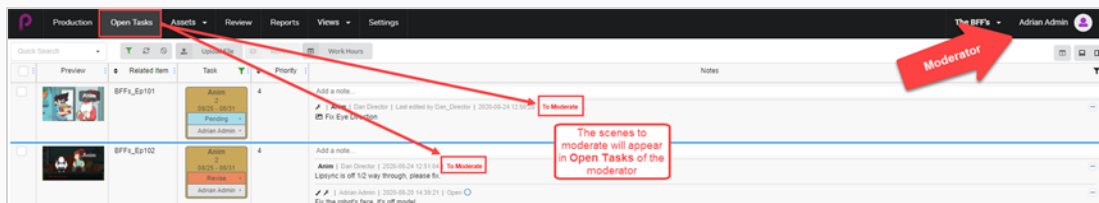


7. In the Data Manipulation Permissions section, check the **Moderator** and **Moderated** checkboxes.
8. Click **Save**.

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.

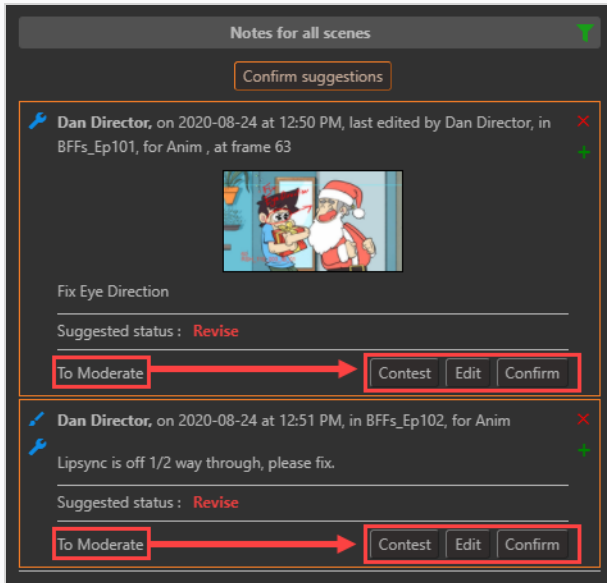


How to view and moderate notes

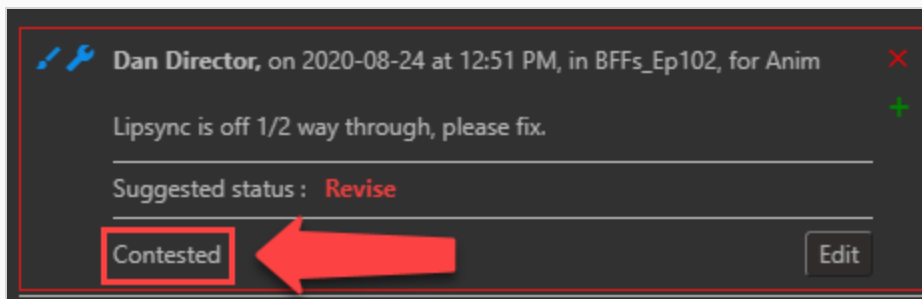
1. In the main menu, select **Review**.
2. In the Review tab, in the Open Reviews section, select a review.

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  button appears.

NOTE

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

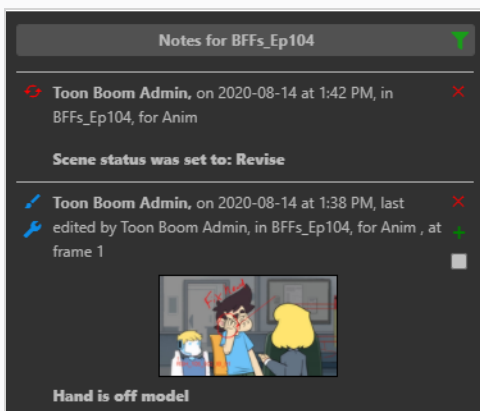
Closing and Reopening Notes in the Review Session

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.



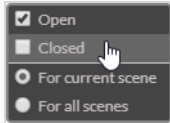
NOTE

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.

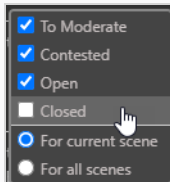
How to reopen a note

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.



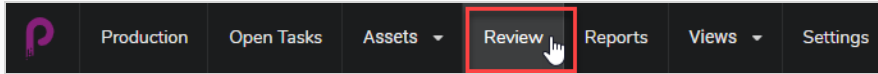
All closed notes will now be hidden from view.

Downloading Reviews

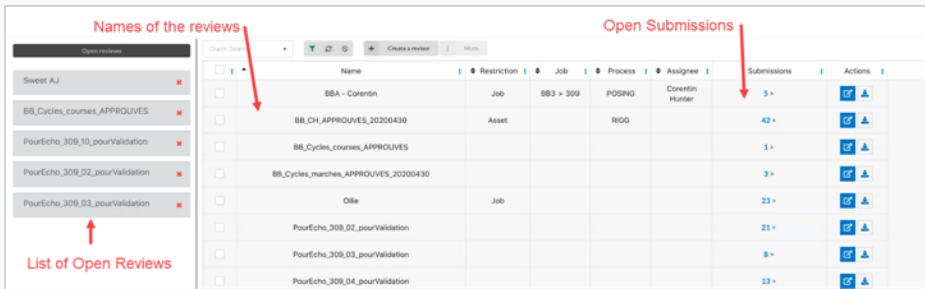
Producer gives you the ability to download the reviews on your local machine.

How to download reviews

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

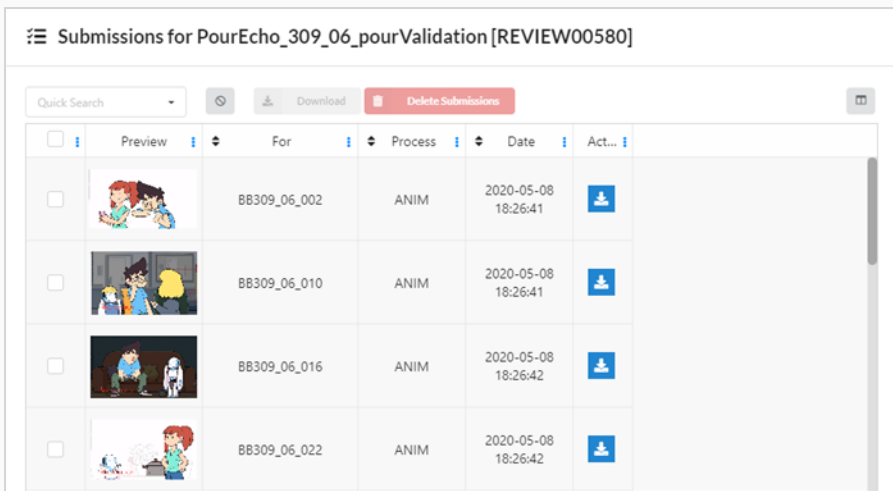


You will then see Open Reviews, Names of the Reviews and Open Submissions.

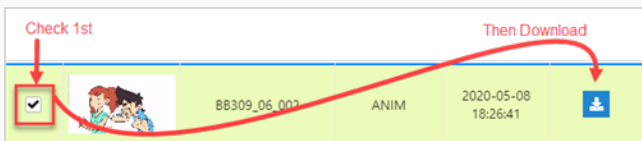


2. To view a submission, click on the number in the submission column.

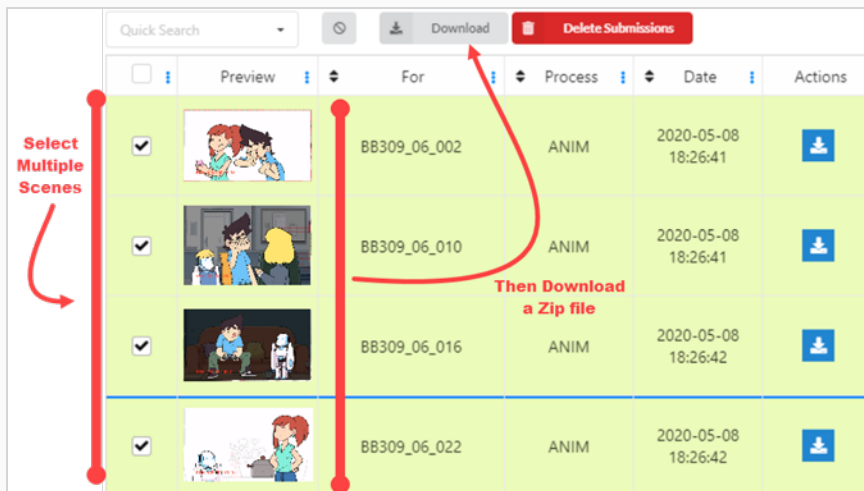
The Submission window opens.



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.



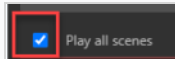
- You can also download multiple scenes at the same time into a Zip folder. Select all the scenes you wish to download and then click on the Download button above the entries.



- 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.

- In the Scenes area, check the select all boxes or select the individual videos you wish to have stitched together.

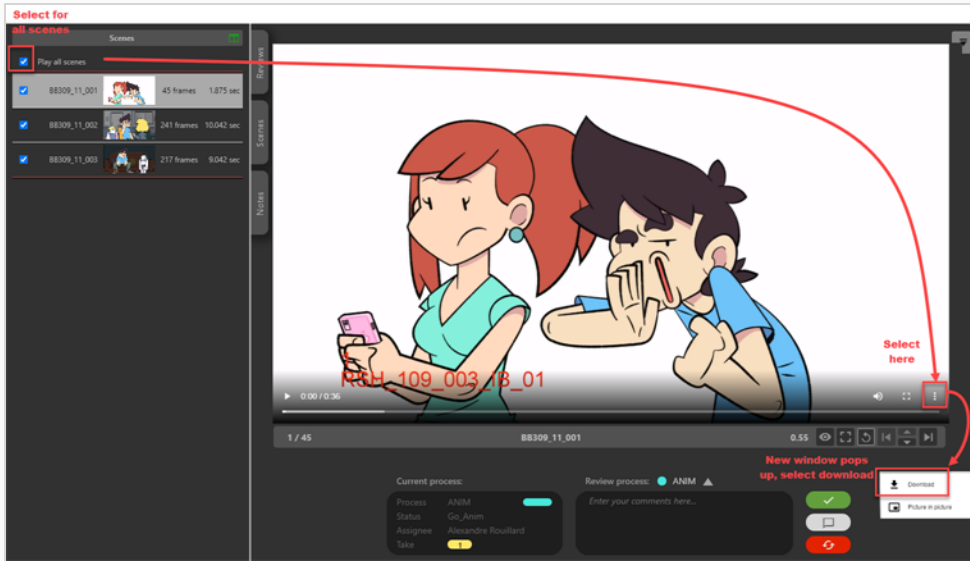


- In the Play window, select the more options button to the bottom right of the screen.



A new window opens.

- 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.

Scenes	Reviews
<p>Play all scenes</p> <p>BFFs_Ep101 6,080 sec</p> <p>BFFs_Ep102 100 frames 4,000 sec</p> <p>BFFs_Ep103 900 frames 36,000 sec</p> <p>BFFs_Ep104 1040 frames 41,704 sec</p> <p>BFFs_Ep105 900 frames 36,131 sec</p> <p>BFFs_Ep106 600 frames 24,103 sec</p> <p>BFFs_Ep107 991 frames 39,753 sec</p> <p>BFFs_Ep108 1170 frames 46,905 sec</p> <p>BFFs_Ep109 520 frames 20,898 sec</p> <p>BFFs_Ep110 609 frames 24,474 sec</p>	<p>All these red lines mean there will be a problem stitching together</p>

Chapter 11: About Importing from Storyboard Pro

This procedure will allow you to create all the scenes in Producer and import the animatic and meta-data directly from Storyboard Pro.

Importing from Storyboard Pro

This section explains how to export data from Storyboard Pro and import it in Producer.

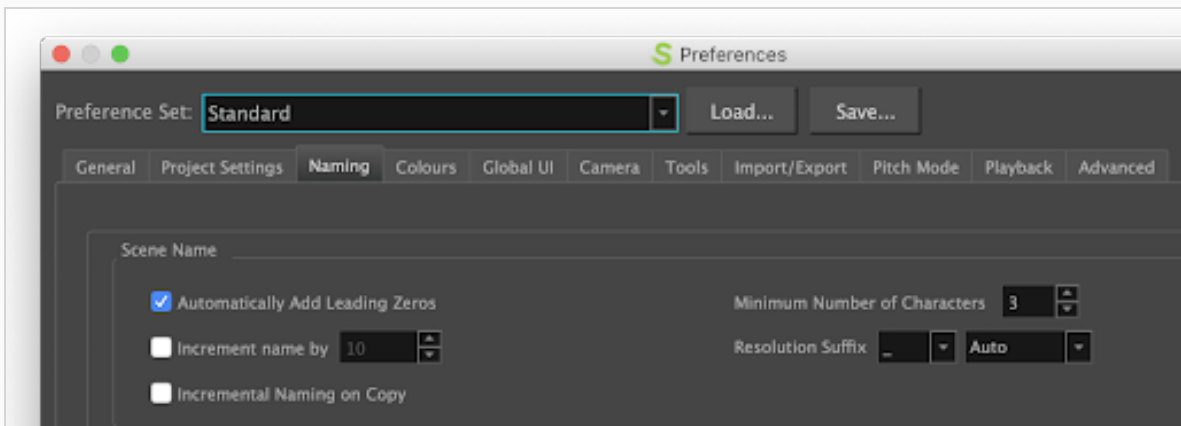
How to export data from Storyboard Pro

There are 3 steps to export your data:

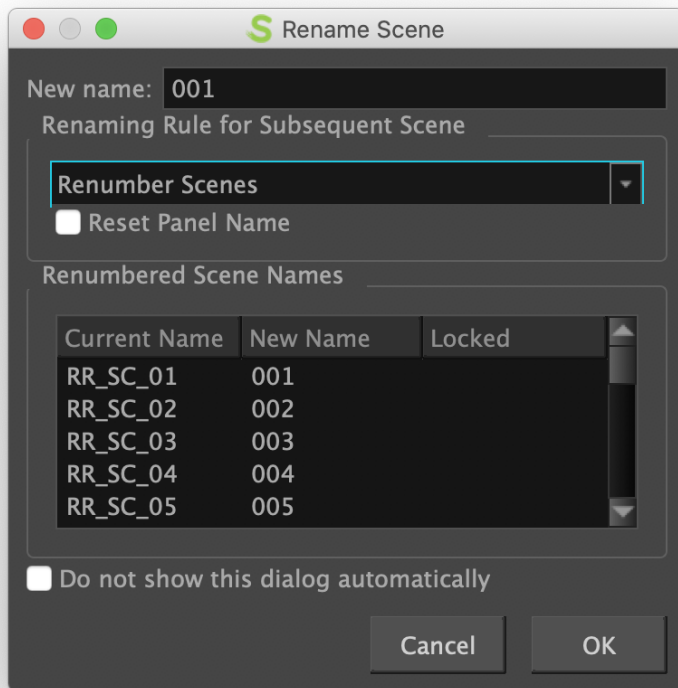
- Add leading Zeros
- Export CSV from Storyboard Pro
- Export Movie files from Storyboard Pro

Add leading Zeros

1. Go to Preferences > Naming tab, select Automatically Add leading Zeros.
 - In Storyboard Pro, make sure your scenes are named with leading zeros (for example: 01, 02, 03 or 001, 002, 003 and not simply 1, 2, 3)
 - Enter the Minimum Number of Characters.



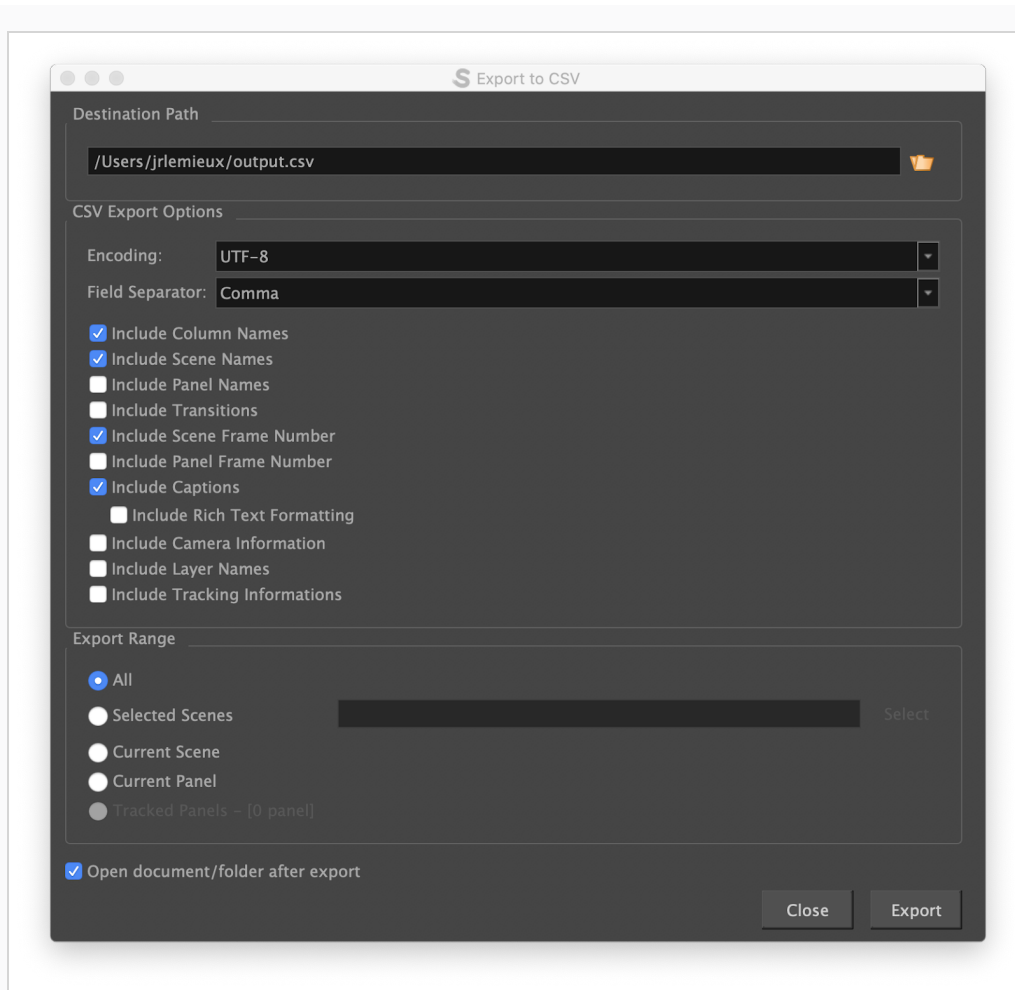
- In the Top menu, click Storyboard and select Rename Scene.



- Save your SBP project.

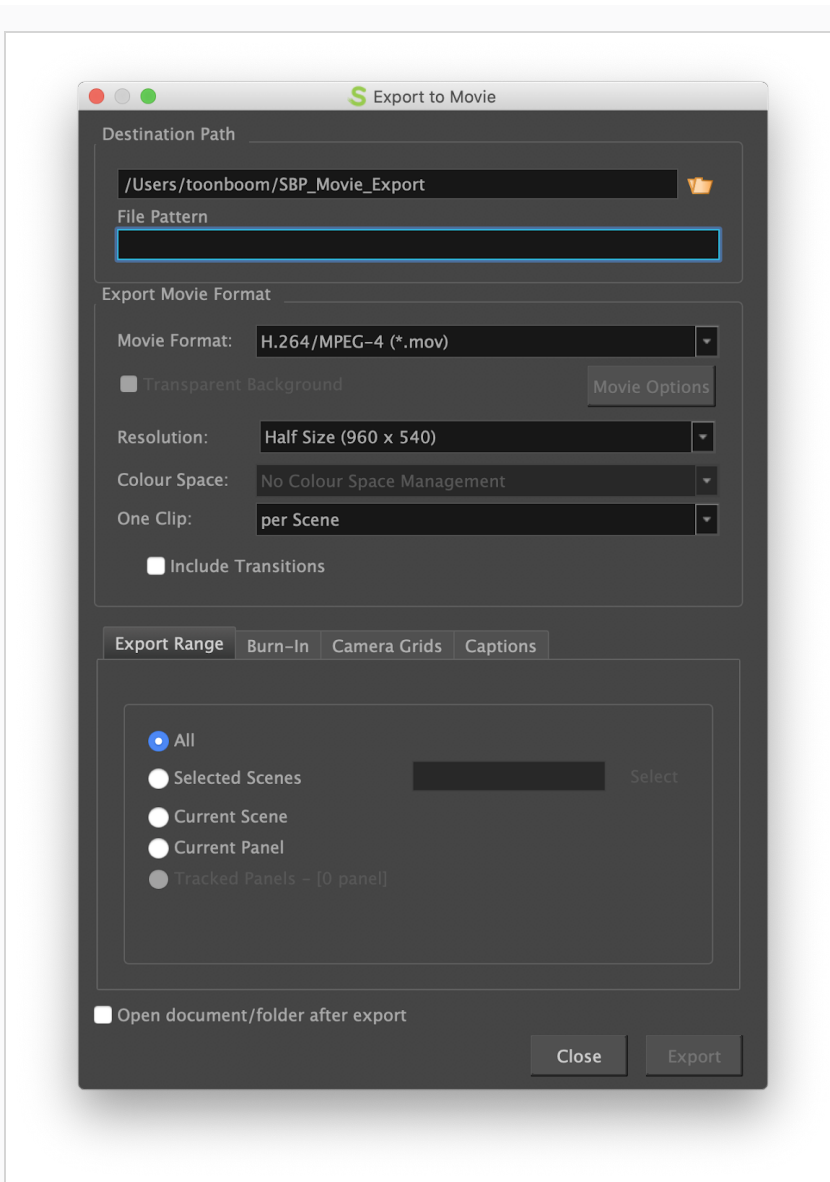
Export CSV from Storyboard Pro

1. From Storyboard Pro, choose *File / Export / CSV*
2. Uncheck the “Transitions” option
3. Click Export



Export Movie files from Storyboard Pro

1. From Storyboard Pro, choose *File / Export / Movie*
2. Fill in the Destination Path
3. Leave the File Pattern field blank
4. In One Clip field, select per Scene from the drop-down list
5. Click Export



How to import Storyboard Pro data in Producer

1. Determine which workflow process will be used.

We recommend that you create a process "Animatic" in your scene workflow.

Animatic	Layout	Setup	Anim	Comp
Standby ▼	Standby ▼	Standby ▼	Standby ▼	Standby ▼
Unassigned ▼	Unassigned ▼	Unassigned ▼	Unassigned ▼	Unassigned ▼

2. Use "Import from Storyboard Pro" in Producer Link.

NOTE

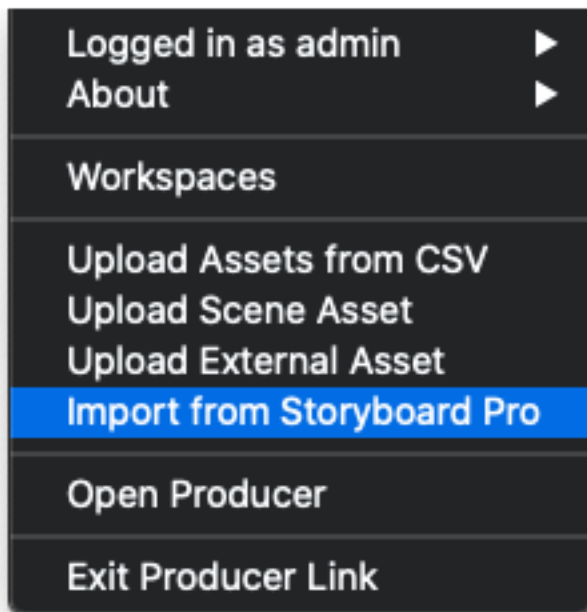
Please see [How to download Producer Link](#) for more information on downloading the Producer Link.

3. Open the Producer Link application.

TIP

If your Producer Link is not already connected to Producer, make sure to use the login function.

4. From the menu, select Import from Storyboard Pro.

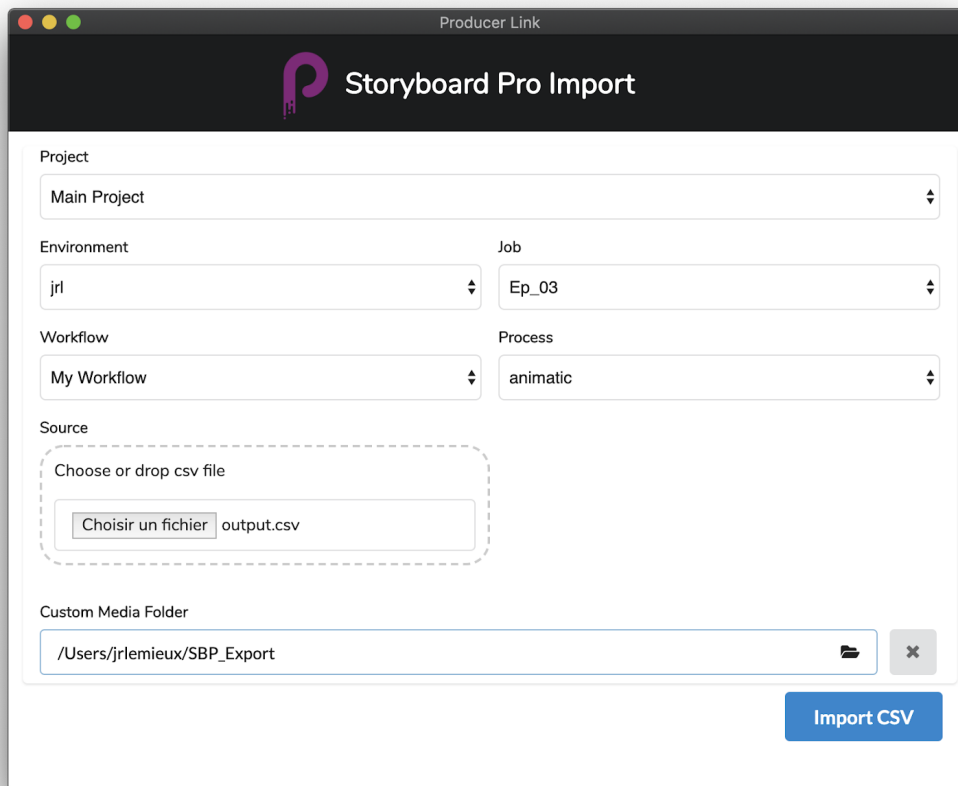


5. Fill all the fields.

NOTE

If you have created an animatic process, select “Animatic” from the drop-down list.

6. Click “Import CSV”.

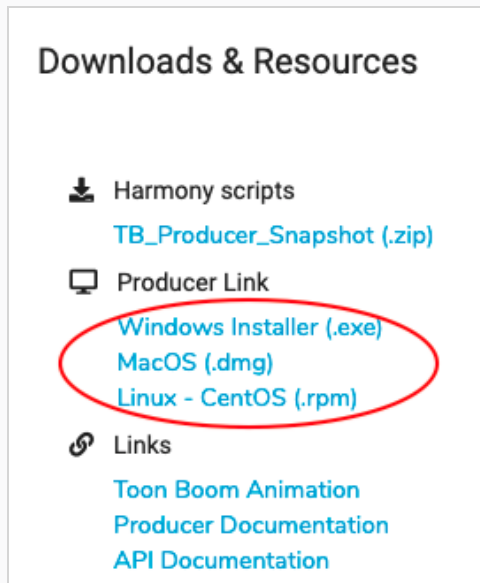
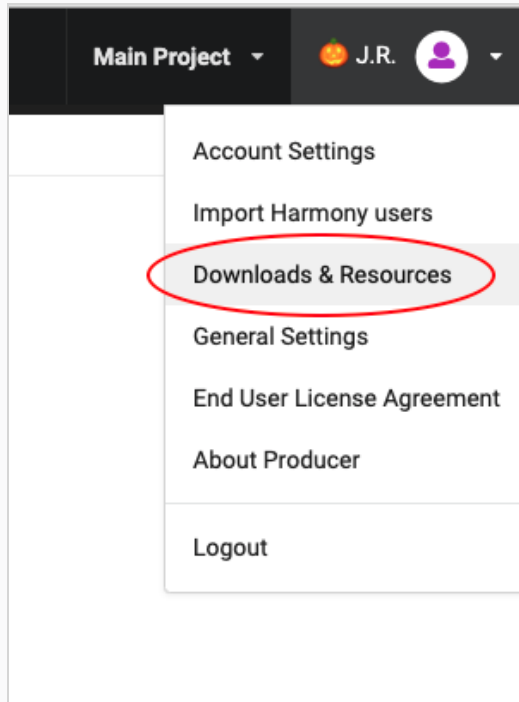


You can monitor the import process by scrolling down. In Producer, refresh your Production page to see the new scenes.

How to download Producer Link

To download the Producer Link, you can follow the steps below.

1. Select "Downloads & Resources" from the menu.



2. Click the Producer Link file for your platform.

Chapter 12: About Reports

Reports can be used to keep a track of multiple aspects of the production.

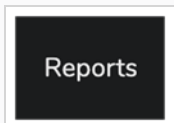
Workload Manager

Keeping track of how much work everyone has on their plate is an important part of a supervisor’s duties. An artist can get overwhelmed or late when tasked with too big of a workload. On the other hand, artists can end up waiting for work if too little has been assigned to them.

The Workload Manager is a tool specifically designed to address this need.

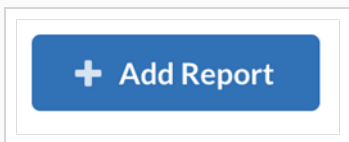
How to generate a Workload Report

1. In the main menu, select Reports



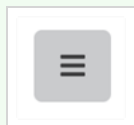
From here, you can either open an existing Workload report that was previously saved (from the list of reports in the sidebar) or you can create a new report. This is what we will do here.

2. From the left panel, click on the “+ Add Report” button, to clear any previous reports that may be displayed.

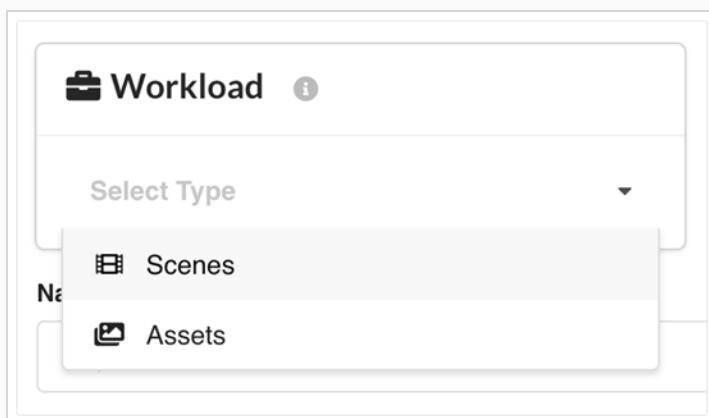


NOTE

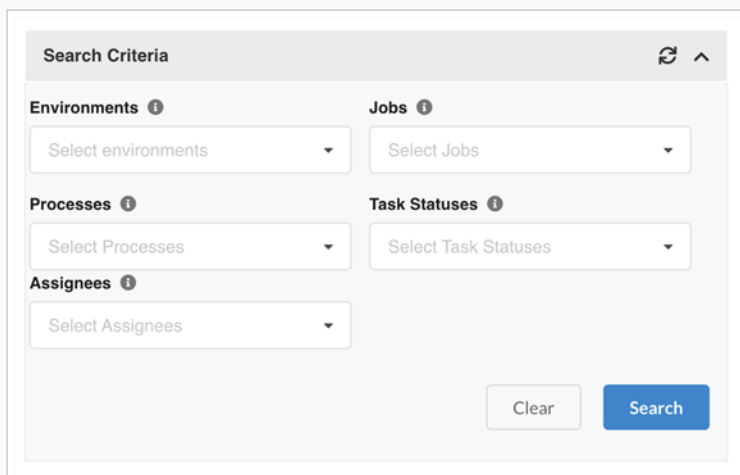
You may hide the sidebar, to maximize the report area. you can always bring it back later, the same way you are hiding it, by clicking on the “Show or hide sidebar” button (the “burger” icon).



3. From the “Workload” report box, select the type of workload you are interested in. You can choose from “Scenes” or “Assets”.



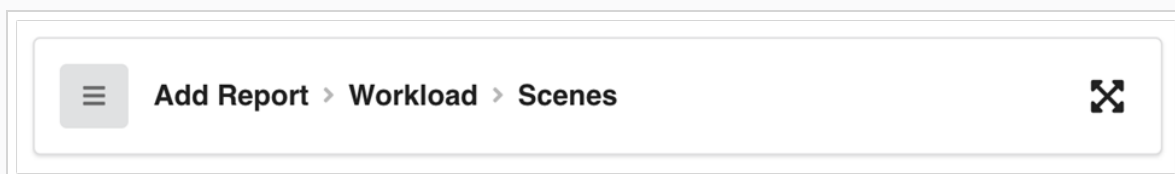
4. From the “Search Criteria” section, restrict the search to your liking. You can choose to focus on a specific environment or on some particular processes or on a given team or on a combination of these criteria. Press the “Search” button when you are ready to proceed.



How to analyze a Workload Report

1. First, it can be a good idea to use the “Distraction free mode” also known as the “Zen mode” to focus on the two main section of Workload Report:
 - a. Report Data
 - b. Reassign Selection

To do so, click on the expanding four arrows icon at the top right.



2. Now, you can analyze the report data. Here is a sample and description of the various areas.

	1	2	3	4	5	6	7
1	KEY ASSIGNEE ⚙						
2	JOB ⚙	PROCESS GROUP ⚙	PROCESS ⚙	STATUS ⚙			
3	SCENE ⚙	▶ Layout	▶ Setup	▶ Rough_Anim	▶ Cleanup_Anim	▶ Compositing	▶ Render
4	▶ (Unassigned)	27	24	28	28	27	24
5	▶ Carina Allen	1	0	0	0	0	0
6	▶ Charlie Simmons	1	0	0	0	0	0
7	▶ Francisco Cruz	0	0	1	0	0	0
8	▶ Frank Banner	0	19	0	0	4	0
9	▶ Jade Jonah	9	4	2	3	0	0
10	▶ Joe Grey	1	0	9	3	4	0
11	▶ Jonathan Lemon	15	0	2	2	0	0

- Vertical headers description:
 - Key assignee: This first column lists the assignees of the various manual tasks.
 - Job: Clicking on the triangle icon preceding an assignee will expand to show the names of the jobs containing tasks assigned to that user.
 - Scene: Clicking on the triangle icon preceding a job name will expand to show the names of scenes within that job that are assigned to that user.
- Horizontal headers description:
 - Process group: The name of the various groups of processes included in this report.
 - Process: Clicking on the triangle icon preceding a process group will expand to show the names of all the processes of that group.
 - Status: Clicking on the triangle icon preceding a process will expand to show the statuses of the various tasks.
- Top row of data: Listing the number of scenes (or assets) that are unassigned for each Process group.
- Data: Displayed on white cells is the number of scenes (or assets) assigned to the given user listed in the leftmost column. In the above example, we understand that user Frank Banner has 19 Setup tasks and 4 Compositing tasks assigned to him.

Key concepts:

- **Key assignee:** Key assignee varies from regular assignee in that they refer to the assignees of manual tasks (ie not approval tasks). Consider the example below:

	1	2	3	4
1	KEY ASSIGNEE ⚙️	PROCESS GROUP ⚙️	PROCESS ⚙️	STATUS ⚙️
2	JOB ⚙️	▼ Layout		
3	SCENE ⚙️		▶ Layout	▶ Layout_check
6	▼ Charlie Simmons	1	1	1
7	▼ RSH_110	1	1	1
8	110_002	1	1	1

The first column on the left lists Charlie Simmons as the key assignee. Because Charlie’s information has been expanded to display which scenes are assigned to him (line 8), we know that the process Layout of scene 110_002 is assigned to Charlie. However, the Layout_check (an approval process) of the same scene is most likely assigned to someone else (a supervisor). Still it is listed on the same row since the key of that list is key assignee, the assignee of the manual task.

- **Process group:** A process group is generated automatically and comprises a manual process and all the approval processes immediately following it in its workflow. The group is named after its manual process. Consider a workflow made up of the following seven processes (where the processes in italic are approval processes).

Layout, *Layout_check*, *Layout_app*, Setup, *Anim*, *Anim_check* and *Anim_app*

This workflow would be divided in 3 process groups:

- **Layout:** Layout, *Layout_check*, *Layout_app*
- **Setup:** Setup
- **Anim:** *Anim*, *Anim_check* and *Anim_app*

A process group can be expanded into its constituent processes simply by clicking on the triangle icon preceding it.

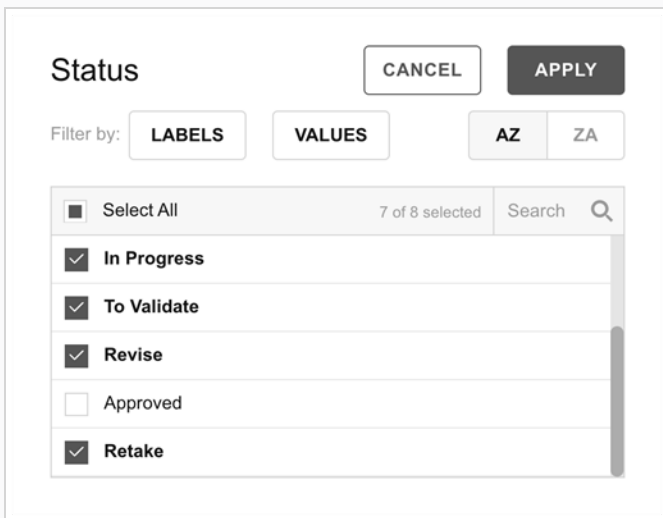
How to filter data in the Workload Report

Once a Workload report is generated, it is possible to filter its data without using the Search Criteria (which would fetch new data from the database). This can be done using the gear icon next to any of the headers.

1. Click on the Status gear icon, for example.



- From the list of Statuses, remove the ones you would like to filter out. For example, removing “Approved” and “To Validate” would leave only tasks that have not yet been completed. Click Apply to confirm the filtering.



- Note how the Status header now has a funnel icon to indicate that it is being filtered.



NOTE

As opposed to the Search Criteria, the filters applied through the gear icons are not saved with the reports. They are temporary by nature.

How to reassign tasks using the Workload Manager

Once you generated a workload report and analyzed its data, you can now proceed to make adjustments to the workload by reassigning tasks.

- For this example, let’s have a single process and a single status as search criteria. Say “Rough_Anim” and “Pending”

Search Criteria ↻ ^

Environments ⓘ **Jobs** ⓘ

Roger_et_ses_humains ✕ Select Jobs

Processes ⓘ **Task Statuses** ⓘ

Rough_Anim ✕ Pending ✕

Assignees ⓘ

Select Assignees

Clear Search

2. Looking at the Report Data, I can tell that Jade has 8 scenes to do while Jonathan has only 1.

	1	2	3	4
1	KEY ASSIGNEE ⚙			
2	JOB ⚙	PROCESS GROUP ⚙	PROCESS ⚙	STATUS ⚙
3	SCENE ⚙	▶ Rough_Anim		
4	▶ (Unassigned)	1		
5	▶ Jade Jonah	8		
6	▶ Jonathan Lemon	1		

3. Clicking on the 8 scenes of Jade will bring up the details of these scenes in the “Reassign Selection” section below.

Reassign Selection ^

Reassign to ⓘ Reassign Cancel Changes Apply Changes

<input type="checkbox"/>	Ass...	Environ...	Job	Scene	#Frames	Actual D...	Planned ...	Process	Status	Status D...	Status By
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_009	520	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_010	609	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_011	60	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_012	60	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_017	60	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_018	60	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_019	60	0	0	Rough_Anim	Pending	2021-12-15	jrl
<input type="checkbox"/>	Jade Jonah	Roger_et_se...	RSH_109	109_020	60	0	0	Rough_Anim	Pending	2021-12-15	jrl

4. Clicking on the scenes you would like to reassign. Note that you can use Control-click (Command-click on Mac) to select multiple entries.

Ass...	Environ...	Job	Scene	#Frames
Jade Jonah	Roger_et_se...	RSH_109	109_009	520
Jade Jonah	Roger_et_se...	RSH_109	109_010	609
Jade Jonah	Roger_et_se...	RSH_109	109_011	60
Jade Jonah	Roger_et_se...	RSH_109	109_012	60
Jade Jonah	Roger_et_se...	RSH_109	109_017	60
Jade Jonah	Roger_et_se...	RSH_109	109_018	60
Jade Jonah	Roger_et_se...	RSH_109	109_019	60
Jade Jonah	Roger_et_se...	RSH_109	109_020	60

- From the Dropbox, pick the name of the user to whom you would like to reassign these scenes and click the Reassign button.

Reassign to ⓘ

Jonathan Lemon
▼

Reassign

The changes are immediately reflected in the Report data, showing that 5 scenes would now be assigned to Jonathan, if you were to go ahead and commit these changes.

5	▶ Jade Jonah	4
6	▶ Jonathan Lemon	5

- You could now continue to reassign various tasks to balance the workload of everyone. Once you are happy with the changes, click on “Apply Changes”.

Apply Changes

◀
4 uncommitted reassignments

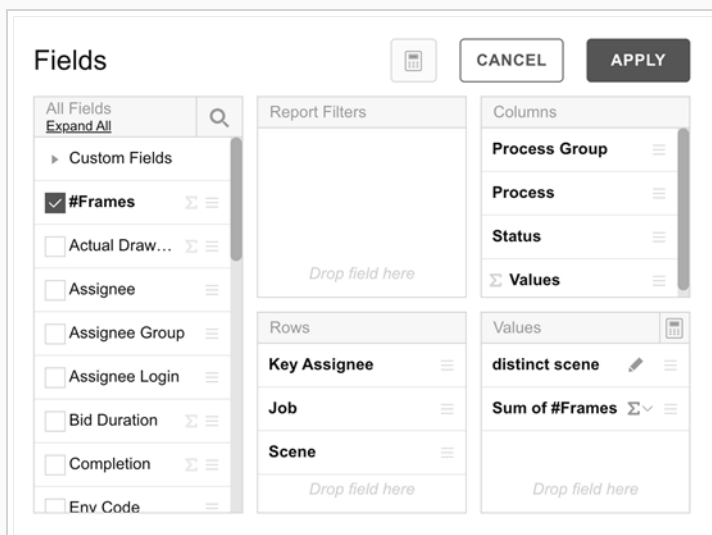
How to customize your Workload Report

Like all Producer reports, you can customize the workload manager. As an example of customization, we will choose to add the number of frames to the number of tasks and we will use conditional formatting to highlight higher tasks numbers. We will then save this report so it can easily be reused at a later time.

- After generating a report, click on the “Fields” icon at the top right of the Report data section. (Note that this icon does not appear in the “Distraction Free mode”)

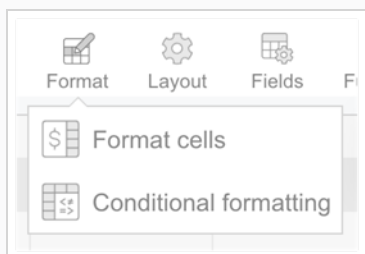


- From the All Fields list on the left, drag the “#Frames” into the “Values” box at the bottom right. Click Apply.

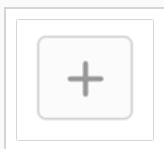


The Report data now shows the number of frames next to the number of tasks.

- Now, click on “Format” and then “Conditional Formatting”.



- Click on the “+” icon to add a condition.



- On the first line, for “Value”, select “Distinct scene”. Then select “Greater than or equal to” and enter the number “5”.

Conditional formatting + CANCEL APPLY

Value:

Format: A 73,93 ×

- Next, click on the letter “A” to configure the format. For this example, click on Highlight, select the colour orange and click Apply.

TEXT HIGHLIGHT

CANCEL APPLY

- Click Apply to confirm the conditional Formatting. Number of tasks greater than or equal to 5 are now highlighted, making it easy to spot a heavy workload.

4	▶ (Unassigned)	1	520
5	▶ Jade Jonah	4	700
6	▶ Jonathan Lemon	5	1 780
7	▶ Toon Boom Admin	2	1 770

- Now to save this report for usage at a later time, you simply need to name the report (at the top, just above the Search Criteria Section) and press the “Save” button.

Name *

Rough Anim Workload Save

Share this report Shared Globally ▼

The report will now appear in your list of reports in the sidebar. It has been saved with your customization.

Sharing Reports

This procedure will allow you to share the report to a user or group of users.

How to share reports

1. In the main menu, select Reports.
2. In the left panel, select a report from the section “My Reports”
3. In the main section, select the option “Share this Report”

The report can be shared globally, to a specific user or group of users.

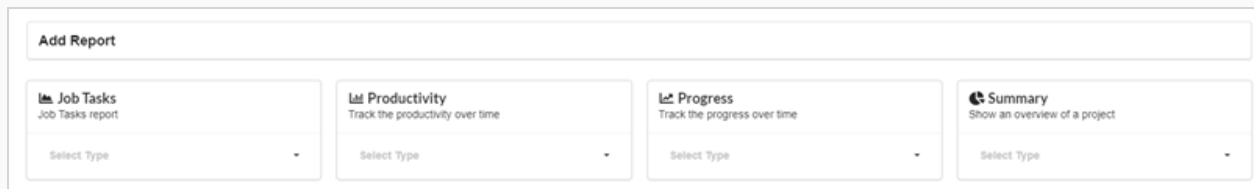
Shared reports will be displayed in the left panel under the section “Shared with me”

Exporting Reports

This procedure will allow you to export the data so that you may use it in another software, such as a spreadsheet.

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).

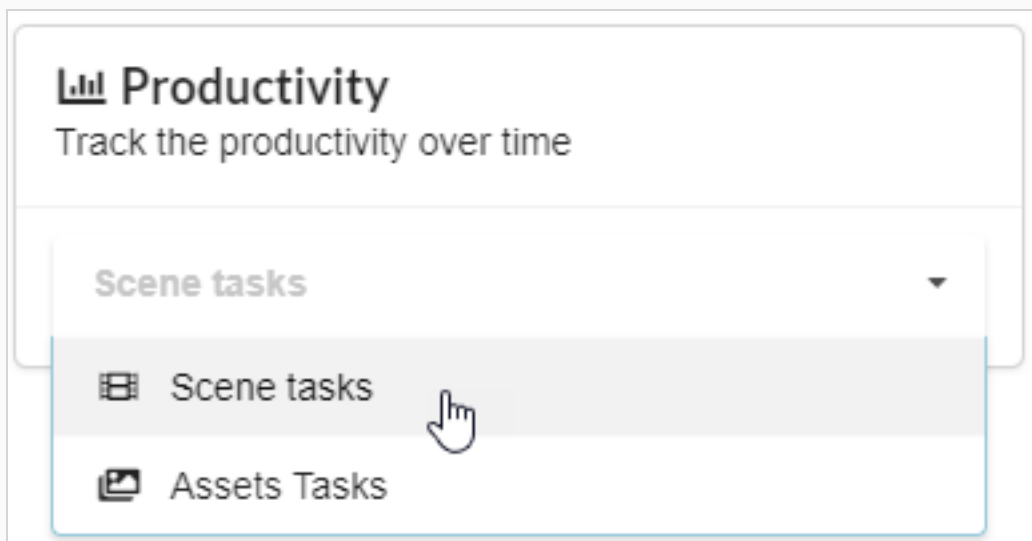


The screenshot shows a 'Add Report' section with four report options, each with a 'Select Type' dropdown menu:

- Job Tasks**: Job Tasks report
- Productivity**: Track the productivity over time
- Progress**: Track the progress over time
- Summary**: Show an overview of a project

3. Select a specification of the report from the drop-down list.

The report options/types appear.



The screenshot shows the 'Productivity' report configuration screen. The 'Scene tasks' dropdown menu is open, showing the following options:

- Scene tasks
- Assets Tasks

4. In the Name field, enter the name of the report.

Add Report > Summary > Assets Tasks

Job Tasks
Job Tasks report

Select Type

Productivity
Track the productivity over time

Select Type

Progress
Track the progress over time

Select Type

Summary
Show an overview of a project

Assets Tasks ←

Name * ←

BFF's Asset Summary 08/18/2020 Save

Search Criteria

Environment ←

The BFF's S01 X

Jobs

Select a Job

Asset Processes

Select Processes

Assignees

Select Assignees

Task Statuses: Select Task Statuses

Status date: Select a date

Clear Search ←

5. Click Save.

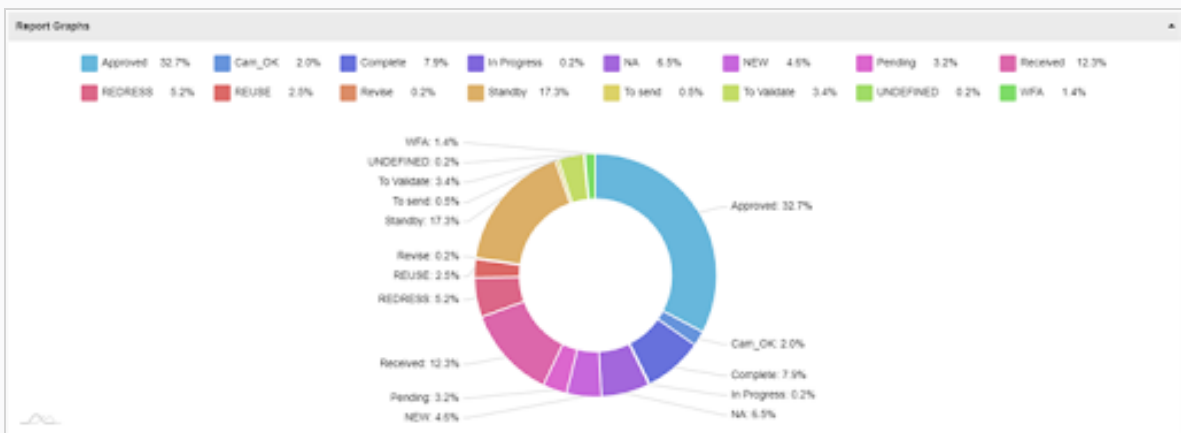
The report is saved in the Saved Reports column on the left.

Report Data

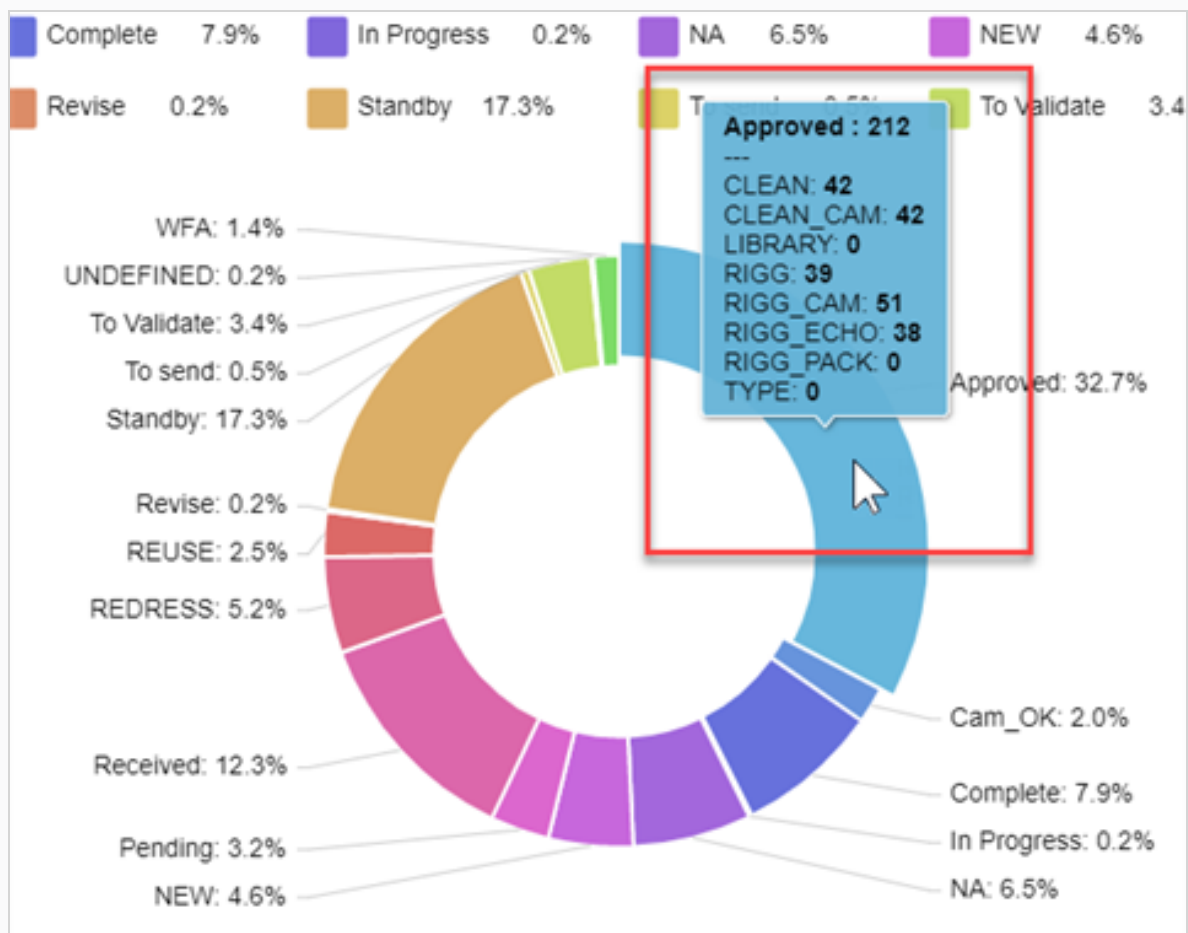
Connect Open Save Export Format Options Fields Fullscreen

ASSIGNEE All

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1	PROCESS													
2	STATUS	CLEAN	CLEAN_CAM	LIBRARY	RIGG	RIGG_CAM	RIGG_ECHO	RIGG_PACK	TYPE	Total Count of process				
10	Received	0	0	0	0	0	0	0	0	0	0	0	0	0
11	REDRESS	0	0	0	0	0	0	0	0	34				34
12	REUSE	0	0	0	0	0	0	0	0	16				16
13	Revise	0	0	0	0	0	0	1	0	0				1
14	Standby	0	20	30	2	21	30	1	0	0				112
15	To send	0	0	0	0	0	3	0	0	0				3
16	To Validate	14	0	0	0	0	0	0	0	0				22
17	UNDEFINED	0	0	0	0	0	0	0	0	1				1
18	WFA	0	0	0	0	0	0	9	0	0				9
19	Grand Total	01	01	01	01	01	01	01	01	640				



You can hover your mouse over different areas of the graph to see additional information.



- In the Search Criteria section, use the drop-down menu to select specifics that you would like to find in the generated report.
- Click 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 in the Saved Reports column. You can use the Search feature at any time to search for specific data from any generated report.

- In the Report Data section, click Export >To CSV to export a CSV file of a particular report.

Report Data

Connect Open Save **Export**

ASSIGNEE All ⚙

	1		
1		PROCE	
2	STATUS	⚙	CLEAN
10	Received		
11	REDRESS		
12	REUSE		
13	Revise		

Print
To HTML
To CSV
To Excel
To Image
To PDF

A .csv document downloads.