

With permission, you can create new campaigns, media types, and jobs. You must create the campaign first, and then create its media types, and then create the jobs for each media type.

**Note:** You must complete all required information during project creation. You can change some required data later. You can enter or change the optional data at any time.

If you assign the team members for the campaign, they are automatically copied to the same roles in the campaign's media types. The media type's team members are automatically copied to the media type's jobs. You can change team members at any level when creating the project or afterwards.

After creating a campaign, media type, or job, you can change the information, schedule the workflow, add notes, and upload documents. See *Working with Campaign Overview & Summary Screens* and *Scheduling Projects*.

## A note about preproduction & production templates

Schedules are divided into three sections: preproduction, production, and postproduction. Preproduction tasks might include loading the production schedule, preparing for the project, and scheduling and holding meetings. Production tasks represent the functions required to produce the work of the project. Postproduction tasks include activities such as completing an assessment form, archiving the creative files, and closing out the job, media type, and campaign.

Your administrator has created workflow templates that insert the standard tasks for the each project level. When you create a campaign, media type, or job, you can select the template for both the preproduction and production tasks. If you don't select a preproduction template, the application automatically uses a default template.

After creating a project, you can revise the tasks and load other templates. See *Scheduling Projects*.

**Create Campaign Screen**

Do not create campaign. Create campaign.

Clear Form Create

\* - Required Field

Campaign Type: [dropdown] \*  
Fiscal Year: 2008 [dropdown] \*  
Campaign Name: [text] \*  
Promotion Begin Date: [calendar] \*  
Production Due Date: [calendar] \*  
Preproduction Template: [dropdown]  
Campaign Description: [text]

Season: [dropdown] \*  
Phase: [dropdown] \*  
Promotion End Date: [calendar]

Production Template: [dropdown]

Clients [Add] [Remove]

Name	Cost Center	Labor GL	Contact Name	Billable	Labor Amount
[Empty rows]					

Billable:  Yes  No Bill Monthly:  Yes  No

Est Campaign Budget: [text]  
Est Project Budget: [text]  
Default Distribution: [dropdown]  
Capital Project Number: [text] [Select] [Clear]

Notes: [text]

Team Members [Load Team]

Project Initiator: [dropdown] Project Owner: [dropdown]

Annotations:  
- Enter or select values for fields.  
- Assign clients.  
- Assign billing options.  
- Assign users.

## CREATING A CAMPAIGN

When you create a campaign, the application automatically:

- Assigns an alphanumeric project "number" that begins with a three-letter designation based on the campaign type.
- Adds the campaign to the database.
- Sets the campaign's status to In Progress.

- Adds the tasks from the selected or default templates to the campaign's preproduction workflow and/or production workflow.
- Assigns any selected users to the appropriate tasks in the workflows.


After you create a campaign, you cannot change:

- The campaign type
- The campaign number

A maximum of four clients can be assigned to each campaign, but those clients can be changed for each media type or job within the campaign. You are not required to assign clients at the campaign level.

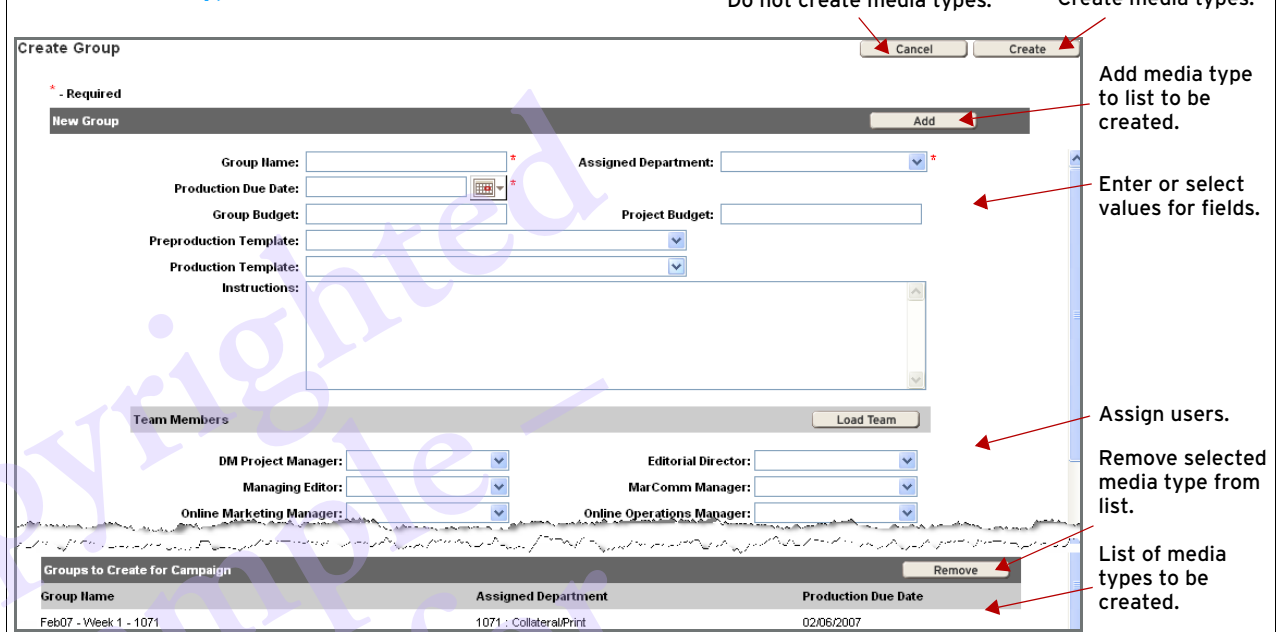


## To create a campaign

- 1 Click the Workspace tab.
- 2 Click Create Campaign on the Workspace menu bar.
- 3 On the Create Campaign screen, complete all required fields (marked with an asterisk \*) and appropriate optional fields.
- 4 To set dates, click  next to a date field, and then select a date.
- 5 From the Preproduction Template and the Production Template drop-down lists, select the workflow templates. (Optional)
- 6 In the Clients section, select the client(s) who will work on the campaign:
  - a) Click the Add button.
  - b) In the Clients window, click a letter at the top to list clients whose names begin with that letter, or click All to list all clients.
  - c) Click a client name. The client appears in the Clients section of the Create Campaign screen.
  - d) Repeat steps a through c to add more clients.
  - e) For each client, from the drop-down list in the Contact Name column, select a contact for that client. (Required)
  - f) When you are finished adding clients, choose the time calculation method in the Labor Amount column, then adjust the numbers in the far right column as necessary.

**Note:** If you add more than one client, and choose a Fixed labor amount for one, at least one other client must have a Balanced labor amount.
- 7 To remove a client from the list:
  - a) Highlight the client by clicking a blank space on its row.
  - b) Click the Remove button on the Clients header.
- 8 If the campaign or any of its media type or jobs will be billable to clients:
  - a) Next to Billable, select Yes.
  - b) Next to Bill Monthly, select Yes to bill the work each month; select No to bill on a particular date.

## Create Media Type Screen



Do not create media types.      Create media types.

Cancel      Create

\* - Required

New Group      Add

Group Name: \*      Assigned Department: \*

Production Due Date: \*      Project Budget:

Group Budget:      Production Template:

Preproduction Template:      Instructions:

Team Members      Load Team

DM Project Manager:      Editorial Director:

Managing Editor:      MarComm Manager:

Online Marketing Manager:      Online Operations Manager:

Groups to Create for Campaign      Remove

Group Name	Assigned Department	Production Due Date
Feb07 - Week 1 - 1071	1071 : Collateral/Print	02/06/2007


Add media type to list to be created.

Enter or select values for fields.

Assign users.

Remove selected media type from list.

List of media types to be created.

- c) If you selected No, click  next to Bill Date, and then select a date on which to bill the project.
- 9 Complete the rest of the client and billing information fields as needed.
- 10 In the Team Members section, select users from each drop-down list.
 

Or

Load a team of users:

  - a) Click the Load Team button.
  - b) In the Teams window, click a team name. The user names assigned to the team appear in the Team Members section of the Create Campaign screen.
- 11 Click the Create button. The campaign is created, and its Campaign Overview screen opens.

The Campaign Overview screen provides access to the campaign's data, user assignments, and files. This screen also lists the campaign's media types and their jobs. See *Working with Campaign Overview & Summary Screens*.

## CREATING MEDIA TYPES


You can create one or more media types for a campaign. The application automatically:

- Assigns an alphanumeric project "number" based on the number assigned to the campaign.
- Adds the media type(s) to the database.
- Adds tasks from the default or selected templates to each media type's preproduction workflow and, optionally, its production workflow.
- Sets each media type's status to In Progress.
- Assigns any team members inherited from the campaign or selected during media type creation.

After you create a media type, you cannot change:

- The media type's type
- The media type number



You create media types only from the Campaign Overview screen. This screen opens when you first create a campaign. You can also open the Campaign

Overview screen by clicking  on the Search Results, My Projects, My Tasks, or in the Campaign Information section of a project's Summary screen.


A maximum of four clients can be assigned to each media type, but those clients can be changed for each job within the media type.

See *Working with Campaign Overview & Summary Screens* for details on the Campaign Overview screen. See *Searching for Campaigns, Media Types, & Jobs* for details on the My Projects and Search Results screens.

### To create media types

- 1 On the Campaign Overview screen, click  next to the campaign's name in the left column.
- 2 On the pop-up list, click Create Media Type(s).
- 3 On the Create Media Type screen, complete all required fields and the optional fields for which you have information.
- 4 From the Preproduction Template and the Production Template drop-down lists, select the workflow templates. (Optional)
- 5 To set dates, click  next to a date field, and then select a date.
- 6 In the Clients section, select any additional client(s) who will work on the media type:
  - a) Click the Add button.
  - b) In the Clients window, click a letter at the top to list clients whose names begin with that letter, or click All to list all clients.
  - c) Click a client name. The client appears in the Clients section of the Create Media Type screen.
  - d) Repeat steps a through c to add more clients.
  - e) For each client, from the drop-down list in the Contact Name column, select a contact for that client. (Required)
  - f) When you are finished adding clients, choose the time calculation method in the Labor Amount column, then adjust the numbers in the far right column as necessary.

**Note:** If you add more than one client, and choose a Fixed labor amount for one, at least one other client must have a Balanced labor amount.

- 7 To remove a client from the list:
  - a) Highlight the client by clicking a blank space on its row.
  - b) Click the Remove button.
- 8 If the media type or any of its jobs will be billable to clients:
  - a) Next to Billable, select Yes.
  - b) Next to Bill Monthly, select Yes to bill the work each month; select No to bill on a particular date.
  - c) If you selected No, click  next to Bill Date, and then select a date on which to bill the project.
- 9 If the media type and all of its jobs will *not* be billable, next to Billable, select No.
- 10 Complete or change the rest of the client and billing information fields as needed.
- 11 If the media type and its campaign have duplicate roles, users assigned to the campaign are assigned to the media type by default. To change these, or if the media type roles are different:
 

In the Team Members section, select users from each drop-down list.

Or

Load a team of users:

  - a) Click the Load Team button.
  - b) In the Teams window, click a team name. The user names assigned to the team appear in the Team Members section of the Create Media Type screen.
- 12 Click the Add button on the New Media Type header. The media type appears in the Media Types to Create section at the bottom of the screen.
- 13 Repeat steps 3 through 12 to add more media types.
- 14 To remove a media type before creating it:
  - a) In the Media Types to Create section, highlight the media type by clicking a blank space on its row.
  - b) Click the Remove button.
  - c) In the confirmation message, click OK. The media type is removed from the list and will not be created.
- 15 When done, click the Create button. All listed media types are now created, and you return to the Campaign Overview screen.

## CREATING JOBS


You can create one or more jobs for a media type. The system automatically:

- Assigns an alphanumerical project "number" based on the number assigned to the campaign.
- Adds the job(s) to the database.
- Adds tasks from the default or selected templates to each job's preproduction workflow and optionally its production workflow.
- Sets the job's status to In Progress.
- Assigns any team members inherited from the campaign and media type or selected during media type creation.

After you create a job, you cannot change:

- The job name
- The job type
- The job number



You create jobs only for an existing media type and only from the Campaign Overview screen. This screen opens when you first create a campaign. You can also open this


screen for any campaign by clicking  on the Search Results, My Projects, My Tasks, or in the Campaign Information section of a project's Summary screen.


A maximum of four clients can be assigned to each job.

See *Working with Campaign Overview & Summary Screens* for details on the Campaign Overview screen. See *Searching for Campaigns, Media Types, & Jobs* for details on the My Projects and Search Results screens.

### To create jobs

- 1 On the Campaign Overview screen, click  next to the campaign's name in the left column to list the media types.
- 2 Click  next to the media type for which you want to create the jobs.
- 3 On the pop-up list, click Create Job(s).
- 4 On the Create Job screen, complete all required fields and the optional fields for which you have information.

- 5 From the Preproduction Template and Production Template drop-down lists, select the workflow templates. (Optional)
- 6 To set dates, click  next to a date field, and then select a date.
- 7 In the Clients section, select any additional client(s) who will work on the job:
  - a) Click the Add button.
  - b) In the Clients window, click a letter at the top to list clients whose names begin with that letter, or click All to list all clients.
  - c) Click a client name. The client appears in the Clients section of the Create Campaign screen.
  - d) Repeat steps a through c to add more clients.
  - e) For each client, from the drop-down list in the Contact Name column, select a contact for that client. (Required)
  - f) When you are finished adding clients, choose the time calculation method in the Labor Amount column, then adjust the numbers in the far right column as necessary.

**Note:** If you add more than one client, and choose a Fixed labor amount for one, at least one other client must have a Balanced labor amount.
- 8 To remove a client from the list:
  - a) Highlight the client by clicking a blank space on its row.
  - b) Click the Remove button.
- 9 If the job will be billable to clients:
  - a) Next to Billable, select Yes.
  - b) Next to Bill Monthly, select Yes to bill the work each month; select No to bill on a particular date.
  - c) If you selected No, click  next to Bill Date, and then select a date on which to bill the project.
- 10 If the job will *not* be billable, next to Billable, select No.
- 11 If the job has roles that match the media type or its campaign, users assigned to these roles at the media type or campaign level are assigned to the job by

default. To change these, or if the job roles are different:

In the Team Members section, select users from each drop-down list.

Or

Load a team of users:

- a) Click the Load Team button.
  - b) In the Teams window, click a team name. The user names assigned to the team appear in the Team Members section of the Create Media Type screen.
- 12 Click the Add button on the New Job header. The job appears in the Jobs to Create for Media Type section at the bottom of the screen.
  - 13 Repeat steps 4 through 12 to add more jobs. Remove any jobs that you don't want to create.
  - 14 To remove a job before creating it:
    - a) In the Jobs to Create section, highlight the job by clicking a blank space on its row.
    - b) Click the Remove button.
    - c) In the confirmation message, click OK. The job is removed from the list and will not be created.
  - 15 When done, click the Create button. All listed jobs are now created, and the Campaign Overview screen reopens.

## DUPLICATING PROJECTS

You can create a campaign, media type, or job by duplicating an existing project at the same level and for the same campaign or media type. The new project includes the following information from the original project:

- Campaign's project type. You cannot change the type.
- Project information, instructions, and description
- Workflow, except for any successive iterations of approval groups
- Important dates
- Notifications
- Users assigned to the Team Members sections and those assigned directly to tasks
- Labor cost information

The project does *not* contain the following from the original project:

- Project number
- Production due date
- Any subordinate media types or jobs
- Uploaded documents
- Notes
- Hard cost information
- Completed assessments

**Note:** You cannot select the Preproduction or Production workflow templates for the new project. All unassigned tasks have the roles set in their task templates and do not reflect any role changes made in the original project.

A duplicate job appears on the Campaign Overview screen with the Pending icon


### To duplicate a campaign

- 1 Open the Campaign Summary screen (see „Opening a Summary screen,“ on page 3).
- 2 From the Action drop-down list, select Duplicate. The Duplicate Campaign screen opens.
- 3 Change the campaign name and any other information as needed.
- 4 Complete any blank required fields, such as the Production Due Date.
- 5 Click the Create button. The Campaign Overview screen opens for the new campaign.

### To duplicate a media type

- 1 Open the Media Type Summary screen (see „Opening a Summary screen,“ on page 3).
- 2 From the Action drop-down list, select Duplicate.
- 3 On the Duplicate Media Type screen, change the name and any other values you want to change.
- 4 Complete any blank required fields.
- 5 Click the Create button. The Campaign Overview screen opens.

### To duplicate a job

- 1 Open the Campaign Overview screen (see "Opening the Campaign Overview screen" in *Working with Campaign Overview & Summary Screens*).
- 2 Click  next to a campaign, media type, or job name in the left column.
- 3 On the pop-up list, click Duplicate. The Duplicate Projects screen opens.
- 4 Check the jobs you want to duplicate. You can check more than one job, or you can check a media type or campaign to check all the jobs it contains.
- 5 Click the Duplicate button. The Campaign Overview screen opens. Each duplicate job appears in the left column, with the Pending icon next to it.
- 6 To change a duplicate job:
  - a) Open the job's Summary screen. See "Opening a Summary screen" in *Working with Campaign Overview & Summary Screens*.
  - b) Make any changes needed.
  - c) On the pop-up list, click Show Job Summary.
  - d) Change the information as needed.
  - e) Click the Save button.

### SENDING PROJECT EMAIL

After creating a project, you can send an email message to any users. The system provides a default message and custom messages written by your organization. All messages provide basic information about the project, its project manager, and a link for the recipient to log into the system to view the project's summary.

The default message provides basic project information. You can write your own text in the Comments field.

### To send a project email

- 1 Open the project's summary screen (see "Opening a Summary screen" on page 3).
- 2 Click the Send Email button. The Project Email window opens.
- 3 From the Email Type drop-down list, select the type.
- 4 Change the Email Subject if needed.
- 5 Enter your text in the Comments field.
- 6 To send the note to specific users or to all users who have the same role:
  - a) Next to the Users/Roles field, click the Select button.
  - b) In the Roles window, click ► to expand a role.
  - c) Click a role, company, division, or user name. All users referenced by the role, company, division, or name appear in the Recipients list.
- 7 To send the note to a predefined distribution list:
  - a) Click the Select button next to the Distribution List field.
  - b) In the Distribution List window, click a list name. The users and external addresses on the list appear in the Recipients list.
- 8 To send the note to an email address not included in the Campaign Management database:
  - a) In the External Email field, enter an email address.
  - b) Click the Add button. The address appears in the Recipients list.
- 9 To remove a recipient from the list:
  - a) In the Recipients list, highlight the name(s) and/or address(es) you want to remove.
  - b) Click the Remove button.
- 10 Click the Send Email button. A message is displayed while the email is being sent.
- 11 Send the note with a different comment to others, or click the Close button to return to the previous screen.

### CHANGING THE PROJECT

If you made errors while creating a project, you can correct most of them from the appropriate Summary screen (with permissions). You cannot change the project's number or the campaign's or media type's type. You cannot move a job to another media type or a media type to another campaign. See *Working with Campaign Overview & Summary Screens*.

Each campaign, media type, and job is a project with at least one scheduled task in the workflow. The workflow consists of three segments: preproduction, production, and postproduction. Each segment contains tasks that are assigned to users or roles and that have due dates.

- Preproduction tasks typically include assigning users to the job, concept and kick-off meetings, and setting the schedule.
- Production tasks include activities required to meet the goals of the job, such as designing, approving the work, and producing the final ad, Web page, and so forth.
- Postproduction tasks include archiving files to the Content Management application, compiling final costs for the client, completing assessment questionnaires, and retiring the project.

Depending on how your company has structured your projects, you might schedule workflows only at some

levels, such as only for jobs. The procedures for scheduling at any level are the same.


Your administrator has defined templates for all the types of work that your company manages in the Campaign Management application. The templates insert a workflow that you can use as is or change for the current project. During project creation, you can select the preproduction and production templates. If you don't select a preproduction template, the application inserts the default template. If you don't select a production template, you can load a template or create the workflow using the Schedule screen. You create a postproduction workflow only on the Schedule screen and only after the production workflow has been saved.

You can load multiple templates, add new tasks, and remove tasks in any of the workflow segments.

## OPENING THE SCHEDULE

The Campaign Management application is typically configured to include a scheduling task in the preproduction workflow. The task might be called something like "Set Schedule" or "Load Production Template." You might receive an email when it's time to schedule a project.

A scheduling task provides two special features:

- Allows a user to set the schedule for a project without having permission to change schedules at any other time.
- Provides a shortcut icon  to open the Schedule screen from the My Tasks screen for this task.

If you have permission to change schedules, the shortcut icon is also available for all projects on the My Tasks screen, the My Projects screen, and the Search Results screen.

**Schedule Screen**

Change date. View all notes. Save & keep open. Undo changes & close. Save & close.

View Notes Apply Cancel Save

Job Number: SPR610-00003 Job Description: Web Pages: Spring Phase 6 2010 Creation Date: 11/12/2007

Segment	Calculation	Start Date	Last Task Due Date	Segment Due Date	Completed Date
Preproduction	Forward from Start Date	11/12/2007	11/12/2007		11/13/2007
Production	Forward from Start Date	12/12/2007	12/26/2007	03/01/2010	
Postproduction	Forward from Start Date				

Preproduction Tasks Production Tasks Postproduction Tasks

Create Group Create Task Remove Move Up Move Down Load Template

Task Name	Assigned To	Completed By	Duration	Due	Complete	Status
Overall Workflow Group				01/22/2008		In Progress
Persistent & AdHoc Tasks				01/22/2008		In Progress
Primary Workflow				12/26/2007		In Progress
Job Spec Sheet Approval (1)				12/17/2007		In Progress
Complete Job Spec Form	Client		4	12/17/2007		In Progress
Approve Job Spec Form	Project Owner		0	12/17/2007		In Progress

Change user assigned to this task. Adjust duration or due date.

Set production schedule calculation method.

Indicates the current workflow.

View Preproduction workflow.

Group a set of tasks.

Expand all groups in workflow.

Approval task group.

Click to change the task.

Project creation date.

Production Due Date set during project creation.

Create a task from a task template.

Delete the selected task.

Move the selected task up or down a row.

Add a workflow from a workflow template.

Recalculate dates when duration or due date changes.


Shortcut to set status.




You can also open the schedule from a project's Summary screen and from the Campaign Overview screen.

To search for newly created projects and set their schedules, see *Searching for Campaigns, Media Types, & Jobs*.

### To open the schedule from My Tasks

- 1 Click the Workspace tab.
- 2 On the Workspace menu bar, click My Tasks.
- 3 On the My Tasks screen, click  next to the project's number. The Schedule screen opens.


### To open the schedule from My Projects

- 1 Click the Workspace tab.
- 2 On the Workspace menu bar, click My Projects.
- 3 On the My Projects screen, click  next to the project's number. The Schedule screen opens.


### To open the schedule from a project's Summary

- On a project's Summary screen, click the Edit button on the Schedule/Current Task section header.

### To open a schedule from Search Results

- 1 Use Basic Search or Advanced Search to find the project.
- 2 On the Search Results screen, click  next to the project's number. The Schedule screen opens.

### To open the schedule from the Campaign Overview

- 1 On the Campaign Overview screen, click  on the same row as the campaign, media type, or job whose Schedule screen you want to view.
- 2 On the pop-up list, click Edit <Campaign, Media Type, Job> Schedule. The Schedule screen opens.

## CALCULATING THE SCHEDULE

### About the workflow segments and dates

Each workflow segment has its own date calculation method, start date, last task due date, segment due date, and completed date:

- **Preproduction**  
Schedule is always calculated forward from the start date, which is the project's creation date. The due date is calculated from the creation date plus the durations of the tasks in this segment.
- **Production**  
Schedule can be calculated forward from the start date or backward from the last task's due date. You set the start date if calculating forward and the end date if calculating backward. The other date is calculated from your date plus the durations of the tasks in this segment.
- **Postproduction**  
Schedule is always calculated forward from the start date, which you must set. The due date is calculated from the start date plus the durations of the tasks in this segment.

The start date of a segment can overlap with the previous segment's last task due date. However, the first task in a segment becomes active only when the last task of the previous segment completes.

**Note:** If a workflow segment contains an approval group, the application calculates due dates with the assumption that all predicted iterations will take place. See "Creating an approval group" on page 6.

### Weekends

Weekends are excluded in all schedule calculations.

### Production calculation methods

You can select one of the following methods for calculating the production schedule:

- **Forward from Start Date**  
The application calculates the due dates of the tasks from your selected production start date. If a task completes ahead of schedule, the next task is activated earlier but keeps its original due date.

- **Forward w/ Accelerated Date Calculation**  
The application calculates the due dates of the tasks from your selected production start date. If a task completes ahead of schedule, the due dates of the remaining tasks are recalculated from the date of the last completed task. The first adjusted due date is shown in bold blue text to indicate the schedule was accelerated.
- **Backward from Due Date**  
The application calculates the due dates of the tasks from your selected date for the last task in the segment. You can change the last task's due date on the Schedule screen.


### Task due dates

By default, each task's due date is calculated from the due date of the previous task (or the start date of the segment) plus the current task's duration.


When using a forward calculation method, you have the option to set a due date for any task. The due dates for subsequent tasks are then based on the set due date.

## Calculating the schedule


### To calculate the production schedule from a start date

- 1 On the Schedule screen, click the Production Tasks tab to make it the active tab.
- 2 Next to the Production segment, select Forward from Start Date from the drop-down list in the Calculation column.
- 3 In the Start Date column, click , and then select a start date.


### To calculate the production schedule from the last task's due date

- 1 On the Schedule screen, click the Production Tasks tab to make it the active tab.
- 2 Next to the Production segment, select Backward from Production Due Date from the drop-down list in the Calculation column.
- 3 In the Last Task Due Date column, click , and then select the last task's due date.

### To accelerate the production schedule



- 1 On the Schedule screen, click the Production Tasks tab to make it the active tab.
- 2 Select Forward - Accelerated from the drop-down list in the Calculation column next to the Production segment.
- 3 To set or change the date (whichever is appropriate), click  in the Start Date column, and then select the start date.

### To calculate the postproduction schedule

- 1 On the Schedule screen, click the Postproduction Tasks tab to make it the active tab.
- 2 In the Start Date column, click , and then select the start date.

### To adjust and recalculate any schedule

You can change durations and set due dates (if using a forward calculation method) for multiple tasks before recalculating the schedule.

- 1 In the Duration column of the Schedule screen, enter a new number of days.
- 2 To set a task's due date for a forward calculation method:
  - a) Click  next to the date in the Due column.
  - b) Click  next to the date in the Due column, and then select the date.
- 3 Click  at the top of the Due column to update the due dates.

## Saving Schedule Changes

As you work with the schedule, save your changes frequently.

**Note:** You must save all new tasks before you can view the task's summary or complete the task in the schedule.

### Last task and production due dates

If you changed the last task's due date to be later than the production due date, a warning message is displayed. You can cancel the save and adjust the schedule so the last task is due earlier than or on the production due date, or you can continue and save the changes. Continuing

the save sends a production due date exceeded notification if this notification is assigned to the project. The notification contains a link to the project's Summary screen where you can adjust the production due date so the project is due later than or on the last task due date.

### To save changes and keep the Schedule open

- Click the Apply button.

### To save changes and close the Schedule screen

- Click the Save button.

### To remove all changes made since the last save

- 1 Click the Cancel button.
- 2 In the confirmation message, click OK. The Schedule screen closes.

## CREATING THE WORKFLOW

Loading a workflow template is the quickest way to create tasks for a project. Your company has templates for your most common project types. The template inserts a set of tasks, which you can delete or reorganize. You can add tasks and load other project templates.

**Note:** The project's workflow is not linked to the templates used to create it. Changing a workflow template later does not affect existing project schedules.

### Loading a workflow template

When selecting a workflow template, the application lists only the templates whose type matches the currently open tab (segment) on the Schedule screen. For example, if the Postproduction Tasks tab is the active tab, only postproduction templates are available.


On the Load Template screen, you can:

- View all templates for the selected tab.
- Filter the list to show only the templates that belong to a particular category.
- Filter the list to show only the templates that belong to the current project's type. For instance, if your project is a campaign, only the templates for that campaign type—Seasonal, Non-Seasonal, or Single Job—will be displayed.

**Note:** When you load a template to an active parallel task group or at the end of a completed workflow, at least one new task becomes active when you save the schedule. Task activation notifications are sent to the user(s) assigned to the task or to the task's role. If users are assigned via the Team Members section of the project's Summary screen, they are automatically assigned to the new tasks, and only the appropriate task owner receives the email notice. To avoid sending unnecessary emails, be sure that users are assigned to any active task(s) before saving the schedule. See "To assign a user to tasks on the Schedule screen" on page 9.

### To load a workflow template

- 1 On the Schedule screen, click the tab for the segment (Preproduction, Production, or Postproduction Tasks) where you want to insert the tasks.
- 2 If tasks are listed, highlight the row *above* the location for the new template by clicking a blank space on its row. If you don't highlight a row, the template's tasks are added to the end of the workflow.
 

**Tip:** To add a template after a group, highlight the group rather than a task within the group.
- 3 Click the Load Template button. The Load Template screen opens.
- 4 To shorten the template list, select Filter by Category, and then select a category from the drop-down list; or select Filter by Project Type.
- 5 If you selected a group on the Schedule screen, the Load Template into Selected Group option is visible and checked. To place the template *after* the selected group, clear the check mark from this option.
- 6 Highlight the template you want to load.
- 7 Click the Load button.
- 8 If the template contains fixed-date milestones, a message notifies you to adjust these dates for the current project:
  - a) Click OK in the message.
  - b) Click  in the Due column of the milestone task (highlighted in pink), and then select the date for the milestone.
- 9 Review and organize the tasks listed on the Schedule screen as needed.

## About tasks

You can only add tasks by selecting a task template that defines the basic information about the task, such as the assigned role, duration, document types, and statuses. You can change the information from the template, except for the document types and statuses.

**Note:** Changing the document types and statuses in a task template affects all noncompleted tasks based on the template. Any other changes to a task template do not affect existing tasks.

## Task Owners

The recommended approach for assigning users to tasks is to assign the task templates to appropriate roles. When a task template is added to a project, the user assigned to the role in the Team Members section of the project's Summary screen is automatically assigned to the role's tasks in the workflow. If the role is reassigned in the Team Members section, the tasks are reassigned appropriately in the workflow.

If needed, you can assign tasks to users when adding a new task or on the Schedule screen. Reassigning the corresponding role in the Team Members section, however, overwrites the assignment made at the task level.

See "Assigning a user to a task" on page 8 and *Managing Campaigns, Media Types, & Jobs*.

## Document types

The document types control whether the user can upload or view files in this task. If the template specifies that a document type is required, the task cannot be completed until the user uploads a file of the required type. All task types, except Auto-Complete, Approval, and Milestone, enforce this requirement. If a document type is required for an Approval task, the user must add a markup note before completing the task.

The administrator can update a task template at any time to allow or require document types for noncompleted tasks in existing workflows.

## Task Type

The task type controls the behavior of the application when a task becomes active or is completed.

Type	Description
Approval	<ul style="list-style-type: none"> <li>When the task is in an approval group, a failed status can insert another iteration of the group's tasks, another template of tasks, or no additional tasks. An approved status can also insert another template of tasks. See "Creating an approval group" on page 6.</li> <li>If the task requires a document type, the user must add a markup note to complete the task.</li> </ul>
Archive Assets	Transfers the selected files and data from the project to the Content Management database.
Assessment	Provides a link from the task to an assessment questionnaire, which the user must fill in before completing the task.
Assign Team	Inserts a Team Members section in the Task Summary screen to allow the task owner to assign users to the current project.
Auto-Complete	Creates a placeholder task to fill time within a schedule. Completes automatically when its duration expires. Does not enforce a required document upload.
Basic and Design	Provides the basis of all other task types; can allow or require files to be uploaded. Use either type when no additional task features are needed.
Email	Provides features to set up and send an email message when the task completes.
Milestone	Signifies a time-critical event within the schedule. Completes automatically when the specified date is reached or when it becomes active if the preceding tasks complete early. Date can be based on prior tasks (dynamic) or on the calendar (fixed). Fixed dates must be set when the milestone is used in a project. A milestone task does not enforce a required document upload.

Type	Description
Project Sleep	Places the project in sleep mode until the task's duration expires. The project's status is set to Sleeping, the project does not appear in search results unless you search for its status, and the task appears on the Auto-Complete tab of the task owner's My Tasks screen.
Schedule	Inserts the schedule icon next to a project number on the My Tasks screen to let the user quickly open the Schedule screen. This type allows a user to change a schedule without the edit permission.

## Important Dates

A project's Summary screen contains an Important Dates section that lists the task names determined to be important for the project. For example, you can share key dates or milestones with a client or vendor without exposing the detailed workflow.

You can specify any task as an important date task, either in the task template or when the task is added to a workflow. When a project's workflow contains an important date task, the task's label appears in the Important Dates section with its scheduled due date and status. When the task is completed, the completion date appears in this section.

## Estimated Task Cost

You can calculate the cost of a task using:

- Per Hour Role – Uses the hourly rate defined for the role assigned to the task's template.
- Per Hour – Uses the hourly rate assigned to the template or the task.
- Fixed Rate – Uses the dollar amount that you enter in the template or the task.

The Per Hour Role rate is set in the definition of the role and cannot be changed when adding a task. If the rate changes in the role definition, all task templates to which the role is assigned are updated automatically, and all new tasks based on the template will use the new rate. Existing tasks continue to use the previous rate.

**Note:** If you change the role assignment when adding a task, the Per Hour Rate does not change. It still uses the role rate assigned to the task's template.

## Organizing task templates

You can organize the list of templates in the Task Templates window by selecting one of the following:

- **Task Name** – Default; templates are listed alphabetically.
- **Task Type** – Templates are listed hierarchically by their task type.
- **Role** – Templates are listed hierarchically by their assigned role.

## Adding a task to the workflow

You can add tasks after the currently active task or to the currently active parallel group. A task added to the active parallel group becomes active when you save the schedule. To avoid sending unnecessary email notifications to other users, make sure that the new tasks are assigned to users either automatically through the Team Members section of the project's Summary screen or manually when you add the task.


### To add a task

- 1 On the Schedule screen, click the tab for the segment in which you want to work.
- 2 Highlight (by clicking a blank space on its row) the task row *above* the location where you want to add the new task. If you don't highlight a row, the task is added to the end of the workflow.
 

**Tip:** To add a task after a group, highlight the group rather than a task within the group.
- 3 Click Create Task.
- 4 If you selected a group on the Schedule screen, the Add Task to Selected Group option is visible and checked. To add the task *after* the selected group, clear the check mark from this option.
- 5 Next to the Task Template field, click the Select button.
- 6 In the Task Templates window, select a View By option: Task Name, Task Type, or Role. (See "Organizing task templates" above for more information.)
- 7 If you selected the Task Type or Role view, click ► next to the task types or roles to see the list of templates for them.

- 8 Click the name of the task template. The values from the template appear on the Create Task screen.
- 9 In the Task Name field, enter a descriptive name for the task.
- 10 If users are assigned in the Team Members section of the project's Summary screen, you can:
  - Leave the task assigned to a role.

Or

  - Select a user to assign to the task:
    - a) Next to the Assigned to field, click the Select button.
    - b) In the Roles window, click ► to expand a role, company, and, if necessary, a division, until you find the user name.
    - c) Click the user name to assign the task to that user and return to the Create Task screen.
- 11 On the Create Task screen, change the rest of the information as needed.
- 12 If this task is going to be billable, make sure Billable is checked. If this task *is not* billable, clear the Billable checkbox.
- 13 To show this task in the Important Dates section of the Summary screen:
  - a) Check Important Date.
  - b) In the Label field, enter the text that appears on the Summary screen.
- 14 If the task is a Fixed Date milestone, click  and then select the date:
- 15 For non-milestone tasks, enter the number of days allotted for the task in the Duration field. If you set the duration to zero, the task is due the same day as the previous task in the schedule. It cannot be the first task in the schedule or in a task group. See "Rules for zero-duration tasks" later on this page.
- 16 Complete the other fields and notifications as needed. See "Adding email notifications to a task" on page 8.
- 17 Click the Done button. The Schedule screen appears with the new task added to the workflow.
- 18 To save your changes, click the Apply button—to save the new task(s) and remain on the Schedule screen—or the Save button—to save the new task(s) and return to the previous screen.

## To move a task


- 1 On the Schedule screen, highlight the task(s).
- 2 Click the Move Up button or the Move Down button.

## To remove a task from the project

- 1 On the Schedule screen, highlight the task(s).
- 2 Click the Remove button.

## Rules for zero-duration tasks

To schedule multiple tasks for the same day, set the duration to zero for the second and successive tasks on that day. In general, the application assigns the due date of the previous task to a zero-duration task.

The icon  appears next to a task's due date on the My Tasks screen to notify a user that other tasks are due on this same day and are dependent on this task being completed in a timely manner.

### Do not place:

- A zero-duration task first in the production workflow, postproduction workflow, or sequential task group.
- Multiple zero-duration tasks at the start of the production workflow when calculating the schedule backwards from the production due date.
- A zero-duration task in a parallel group.

## Creating task groups

You can group tasks. The workflow does not advance until all tasks in the group are completed.

### Types of groups

- A **parallel group** contains tasks that are done concurrently. All tasks become active ("in progress") at the same time.
- A **sequential group** contains tasks that are done in sequence, just as the main workflow. One task at a time becomes active. You can use a sequential task group inside a parallel group.

- An **approval group** contains tasks for creating and then approving materials. The application can insert a workflow template based on a failed or approved status for the approval task(s) in the group. The group's scheduled duration is based on the predicted number of iterations to reach approval. See "Creating an approval group" later on this page.

### Creation options

You can select tasks or groups to be grouped, insert a group within an existing group, or create an empty group.

If you select tasks or a group name on the Schedule screen, the Create Task Group screen provides options for handling the selected task(s) or group:




- Create Group from Selected Tasks and Groups** includes the selections in the new group.
- Add New Group to Selected Group** inserts the group within the selected task's group or the selected group.
- Clearing the check marks from both options creates an empty group outside the selected group.


### To group tasks

- If needed, highlight the tasks or groups to be grouped.
- Click the Create Group button.
- On the Create Task Group screen, enter a name for the group.
- Check the type of group: Parallel or Sequential, or see "Creating an approval group" later on this page.
- Check one or none of the Creation Options. See "Creation options" on this page.
- Click the Done button. The group name appears in the schedule.
- On the Schedule screen, click the Apply button or the Save button to save the group.

### To view the tasks in the group

The arrow next to a group name indicates the type of group:

	Parallel group
	Sequential group
	Approval group

- Click the arrow to display the list of tasks in the group.
- Click the arrow again to hide the group's tasks.
- Click  in the Task Name column heading to expand or collapse all groups.

### To add new tasks to a group

- Highlight the group or a task within the group by clicking a blank space on its row.
- Click Create Task. Follow the steps in "Adding a task to the workflow" on page 5.
- If you selected the group name, check the Add Task to Selected Group option.

### To move a task into a group

- Click the arrow next to the group name to expand the group's task list.
- Highlight the task(s) to be moved to the group.
- Click the Move Up button or the Move Down button until the selected tasks appear indented beneath the group name.

### To move a task out of a group

- Click the arrow next to the group name to expand the group's task list.
- Highlight the task(s) in the group.
- Click the Move Up button or the Move Down button until the tasks are no longer indented beneath the group.

### To remove a group

Removing a group that contains tasks deletes both the tasks and the group. To retain the tasks when removing a group, first move the tasks from the group.

- Highlight the group by clicking a blank space on its row.
- Click the Remove button.
- In the confirmation message, click OK.

## Creating an approval group

An approval group contains tasks for creating and approving materials. It allows additional tasks to be inserted into the workflow upon the approval or failure of the approval task(s) within the group. For example, failing an approval task can insert tasks for revising and reapproving the materials.

The scheduled duration of the group is based on the predicted number of iterations to reach approval. You can send notifications to selected users if the group fails, succeeds, or exceeds the expected number of iterations.

### Failed actions

When a user marks an approval task in the group with a failed status (such as Concept Failed or Art Changes Required), the application can take one of three actions:

- No Failed Action** – No additional tasks are inserted, and the workflow after the group continues as usual.
- Duplicate Group** – The application reinserts all tasks in the approval group.
- Load Template** – The application inserts a new template of tasks as the second and successive iterations of the approval group. For example, the task to revise the materials may have a much shorter duration than the task to create them. If the new template contains an approval group, you should clear the option "Load in Current Group" to place the new group outside the failed approval group; otherwise, the schedule may contain a cascade of approval groups.

### Approved action

The application can also insert a new template of tasks when all the approval tasks in the group are approved. For example, if the approval task is a decision to continue or stop the project, you can select the No Failed Action and a template for the Approved Action. Failing the approval task means stopping the project, and the application would advance to the usual tasks at the end of the project; approving the task means continuing the project, and the application inserts the tasks for producing the project.

### To create an approval group

- 1 If needed, highlight the tasks you want to group.
- 2 Click the Create Group button.
- 3 On the Create Task Group screen, enter a name for the group.
- 4 Next to Group Type, check Approval.
- 5 If you selected tasks or a group on the Schedule screen, check or clear the creation options. See "Creation options" on page 6.
- 6 Select a failed action. See "Failed actions" on page 6 on this page for a description of the options.
- 7 If you selected the Load Template failed action:
  - a) From the Load Template drop-down list, select the workflow template.
  - b) Clear the Load in Current Group option if the new template contains an approval group.

Or

Leave this option checked to place the template's tasks and groups as the second iteration of the failed group.
- 8 To insert new tasks when the approval tasks are approved, select a workflow template from the Approved Action drop-down list.
- 9 If the failed action is either Duplicate Group or Load Template, enter your expected number of review/revise cycles in the Predicted Iterations field. This number is for scheduling and notification purposes.
- 10 Set up notifications as needed:
  - "To load an approval group notification template" on this page.
  - "To manually add approval group notifications" on this page.
- 11 Click the Done button to create the group and return to the Schedule screen.
- 12 Click the Apply button to save your group and remain on the Schedule screen.
 

Or

Click the Save button to save your group and return to the previous screen.

### To load an approval group notification template

You can load a predefined set of notifications.

- 1 On the Create Task Group screen, click the Load Template button on the Notifications header.
- 2 On the Load Notification Template screen, highlight the template to load by clicking a blank space on its row.
- 3 Click the Load button. The notifications from the template are listed on the Create Task Group screen.
- 4 Click the Done button to return to the Schedule screen.
- 5 Click the Apply button to save the new notification(s) and remain on the Schedule screen.
 

Or

Click the Save button to save the new notification(s) and return to the previous screen.

### To manually add approval group notifications

- 1 On the Create Task Group screen, click the Add button on the Notifications header. The Add Notification screen opens.
- 2 From the Notification Type drop-down list, select the type of notification to be sent.
- 3 Next to Who to Notify, select the type of user to receive the message (required):
  - To select a user assigned to the project, select Current Team Member, and then select the user's role from the drop-down list.
  - To select a user outside the team, select Select User/Role, and then click the Select button. In the Roles window, select a role or click ► to expand a role, company, and, if necessary, a division, until you find the user name. Click the name of a role or user. If you select a role, all users with the selected role will receive the email.
  - To select a predefined group of users and non-users, check Select a Distribution List, and then click the Select button. In the Distribution List window, click a list name.
- 4 Click the Add button. The notification appears in the Defined Notifications list.
- 5 Repeat steps 2 through 4 for additional notifications.

- 6 To remove a notification:
  - a) Highlight the notification in the Defined Notifications list by clicking a blank space on its row.
  - b) Click the Remove button on the Defined Notifications header.
- 7 Click the Done button to return to the Create Task Group screen.
- 8 Click the Done button to return to the Schedule screen.
- 9 Click the Apply button to save the new notification(s) and remain on the Schedule screen.
 

Or

Click the Save button to save the new notification(s) and return to the previous screen.

## REFINING TASK DEFINITIONS

After you add a task and save the changes to the schedule, you can change most of the information for a non-completed task. The available statuses and document types must be changed in the task's original template.

**Note:** You cannot change a task without first saving the schedule.

### Adjusting task data

- 1 On the Schedule screen, click the name of the task.
- 2 On the Task Summary screen, click each header to display the fields, or click the Show All button.
- 3 Change the information as needed.
- 4 Click the Done button to return to the Schedule screen.
- 5 Click the Apply button to save the new task(s) and remain on the Schedule screen.
 

Or

Click the Save button to save the new task(s) and return to the previous screen.

## Adding email notifications to a task

A notification sends an email message at a specified task event:

- The task is now active.
- The task is late.
- The milestone is met.
- The milestone is late.
- The task owner changes.
- The archive asset task has an error.

For missed milestone and late task messages, you can set when the first message is sent and the frequency for sending reminder messages. For example, you might want to remind the task owner about a late task everyday, but notify the project manager only after a week. These emails are combined into one message per person per day.

To send the notification to more than one user or role, create multiple notifications or use a distribution list.

### To load a notification template

You can load a predefined set of notifications.

- 1 On the Task Summary screen, click the Load Template button on the Notifications header.
- 2 On the Load Notification Template screen, highlight the template to load by clicking a blank space on its row.
- 3 Click the Load button. The notifications from the template are listed on the Task Summary screen.
- 4 Click the Done button to return to the Schedule screen.
- 5 Click the Apply button to save the new notification(s) and remain on the Schedule screen.  
Or  
Click the Save button to save the new notification(s) and return to the previous screen.

### To add a notification manually

- 1 On the Schedule screen, click the task name.
- 2 On the Task Summary screen, click the Notifications header to view existing notifications.

- 3 Click the Add button on the Notifications header. The Add Notification screen opens.
- 4 From the Notification Type drop-down list, select the type of notification to be sent.
- 5 Next to Who to Notify, select the type of user to receive the message (required):
  - To select the user assigned to the task, select Current Task Owner.
  - To select a user assigned to the project, select Current Team Member, and then select the user's role from the drop-down list.
  - To select a user outside the team, select Select User/Role, and then click the Select button. In the Roles window, select a role or click ► to expand a role, company, and, if necessary, a division, until you find the user name. Click the name of a role or user. If you select a role, all users with the selected role will receive the email.
  - To select a predefined group of users and non-users, check Select a Distribution List, and then click the Select button. In the Distribution List window, click a list name.
- 6 If you selected the Late Task or Missed Milestone type, enter the Frequency for sending repeat notifications and the Start Delay (the number of days after the task's due date).
- 7 Click the Add button. The notification appears in the Defined Notifications list.
- 8 Repeat steps 4 through 7 for additional notifications.
- 9 To remove a notification:
  - a) Highlight the notification in the Defined Notifications list by clicking a blank space on its row.
  - b) Click the Remove button on the Defined Notifications header.
- 10 Click the Done button to return to the Task Summary screen.
- 11 Click the Done button to return to the Schedule screen.

- 12 Click the Apply button to save the new notification(s) and remain on the Schedule screen.  
Or  
Click the Save button to save the new notification(s) and return to the previous screen.

### To change a notification

- 1 On the Schedule screen, click the task name.
- 2 On the Task Summary screen, click the Notifications header to expand it.
- 3 Click the type of notification you want to change.
- 4 On the Edit Notification screen, make your changes.
- 5 Click the Done button.

### To remove a notification

- 1 On the Schedule screen, click the task name.
- 2 On the Task Summary screen, click the Notifications header.
- 3 Highlight the notification you want to delete by clicking a blank space on its row.
- 4 Click the Remove button.
- 5 Click the Done button.

## Assigning a user to a task

The recommended method for assigning users is through the Team Members section of a project's Summary screen. The Assign Team task type also populates the Team Members section. See *Managing Campaigns, Media Types, & Jobs*.

When users are assigned in the Team Member section, they are automatically assigned to their tasks when you add a task or load a workflow template.

You can assign a user to selected tasks on the Schedule screen. However, if a change is later made to the corresponding role in the Team Members section, your changes on the Schedule screen will be overwritten.

If the task is assigned to a role, the user will be assigned to all other tasks in the project that are assigned to the same role. If the task is assigned to another user, the new user will be assigned to only this task.

**Note:** With permission, you can override the task's role assignment to assign a user from another role. The Show All Roles option in the Roles window lists all roles and their users.

### To assign a user to tasks on the Schedule screen

- 1 On the Schedule screen, click the entry in the Assigned To column for the task.
- 2 In the Roles window, click ► to expand the role until you see the list of users.
- 3 Click a user's name to assign the user. The user's name appears in the Assigned To column.

## COMPLETING YOUR SCHEDULED TASK

If you have a schedule task, assign a completed status to allow the workflow to advance to the next task. To add a note to this task, see *Working with Your Tasks*.

You can complete a task from the My Tasks screen and from the Schedule screen. If you change the duration when you complete a task from the Schedule screen, the application recalculates the due dates of the remaining tasks.

### To complete the schedule task from My Tasks

- 1 If the Schedule screen is still open, click the Save button.
- 2 On the Workspace menu bar, click My Tasks.
- 3 On the My Tasks screen, click the In Progress link in the Status column for your scheduling task.
- 4 In the Task Status drop-down list of the pop-up window, select a completed status.
- 5 Enter the number of hours and minutes you spent on this task.
- 6 If the Status Note field appears:
  - a) Enter a note that explains your status.
  - b) Clear the check mark if you don't want your note to propagate to the next task.
- 7 Click the Save button. The task is marked completed and removed from your list of active tasks.