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Proof Manager

Software version 3.23

Studio User Manual

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www.pent.net
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Proof Manager

Studio User Manual

Table of Contents:

Section 1: Getting Started

Login to the system

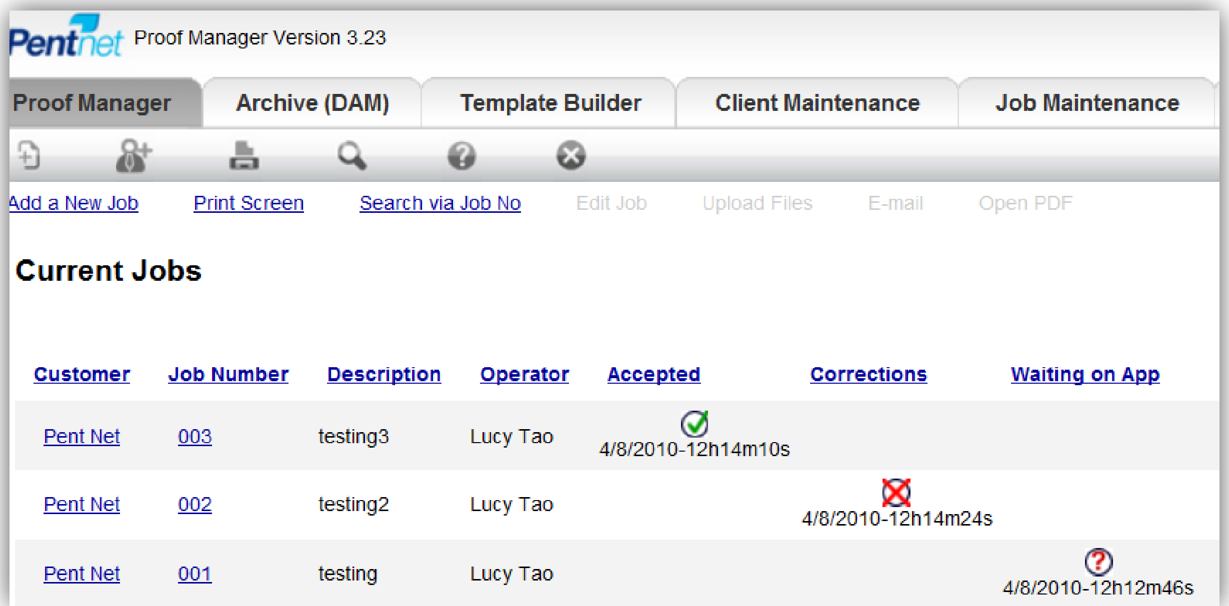
To login to the Proof Manager Studio site:

1. Open the PM Homepage provided by Pent Net.
2. Enter the login name and password.
3. Click on *Submit*.

Section 2: Proof Manager

Current Jobs

After logging in you will see the *Current Jobs* screen.



This screen lists the current jobs. Every job is on a separate line showing the following titles:

1. **Customer –** The company name associated with that login
2. **Job Number –** The unique code chosen by the studio should be consisting of: letters, numbers, underscore only.
3. **Operator (or Client) –** Display name of the studio/client which created this job.
4. **Description –** Job description entered by studio.
5. **Accepted –** Status for jobs approved by client (with time and date of approval).
6. **Corrections –** Status for jobs with corrections marked by client (with date and time of mark-ups sent to studio).
7. **Waiting on App –** Status for jobs submitted to client and waiting on client action (with date and time of submission).

NOTE: Each job can only be in 1 of the 3 states: Accepted, Corrections, Waiting on App. Each option will also show a time and date stamp recording when the action occurred.

To search for jobs, click on the underlined headings under Current Jobs. For example:

1. Click on *Customer* to search via customer name.
2. Click on *Job Number* to search via job number.

3. Click on *Description* to search via description.
4. Click on *Accepted/Corrected/Waiting on App* to search via status date.

NOTE: Searches are case sensitive and partial searches are available. For example if you have two jobs one named PN-103 and the other PN-100, if you click on Job Number and type in PN, both jobs will appear. If you wish to search for all jobs that have been accepted in April 2006, click Accepted, type in 4/2006 and then click submit.

The commands on the *Current Jobs* screen do the following (a job must be selected by clicking on the corresponding customer name):

1. **Add a New Job –** (Please refer to Section 4: Job Maintenance.)
2. **Print Screen** – Lists all current jobs on one page.
3. **Search Via Job No** – Searches all jobs via job number.
4. **Edit Job –** Enters the job details screen.
5. **Upload Files** – Uploads graphics into the thumbnail or attach files to the job.
6. **Email** – Link to send email to the client.
7. **Open PDF** – Generates the PDF of the job.

The active buttons or shortcut keys do the following:

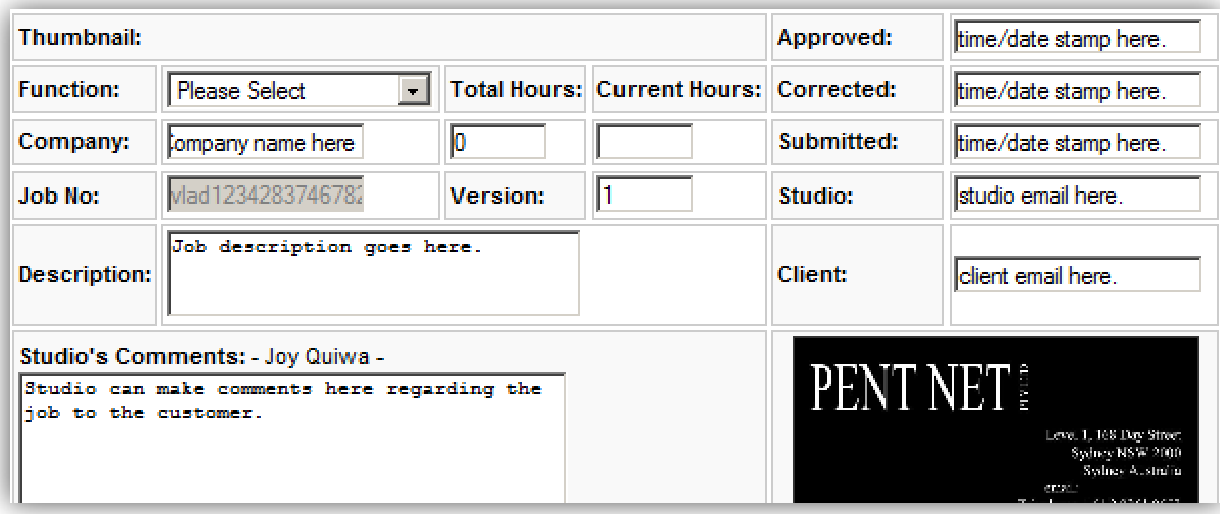
1. Add a new job.
2. Add a new client.
3. Lists all current jobs on one page.
4. Search via Job No.
5. Help screen.
6. Log out of Proof Manager.

NOTE: You MUST log out of proof manager using the last active button. If you close the window without clicking of this button, it will be 15 minutes before you can log in again.

Detailed Job View

To view and edit a job:

1. From the *Current Jobs* screen, click on a job number.



Thumbnail:				Approved:	time/date stamp here.
Function:	Please Select	Total Hours:	Current Hours:	Corrected:	time/date stamp here.
Company:	ompany name here	0		Submitted:	time/date stamp here.
Job No:	vlad1234283746782	Version:	1	Studio:	studio email here.
Description:	Job description goes here.			Client:	client email here.
Studio's Comments: - Joy Quiwa - Studio can make comments here regarding the job to the customer.				PENT NET	

On this screen you can change and add the following text fields:

1. **Company Name –** Will be auto-populated when the job is first created but can be changed manually prior to submission to client.
2. **Description**
3. **Version –** The system has automatic version control so every time a job is submitted, the system adds 1 to the version number.
4. **Studio Comments –** Enter comments here for the client.
5. **Current Hours –** Input the amount of time spent working on this job. This time will be added to the Total Hours field when the job is submitted to the client.
6. **Studio Email –** Will be auto-populated when the job is first created but can be changed manually prior to submission to client.
7. **Client Email –** See above.

NOTE: It is also possible to upload new graphics or attach files to the current job via *Upload Files*. Please see the *Upload Files* section in this manual for full details.

Once you have finished making changes, click on the *Submit New Artwork* button to write these changes to file. This automatically:

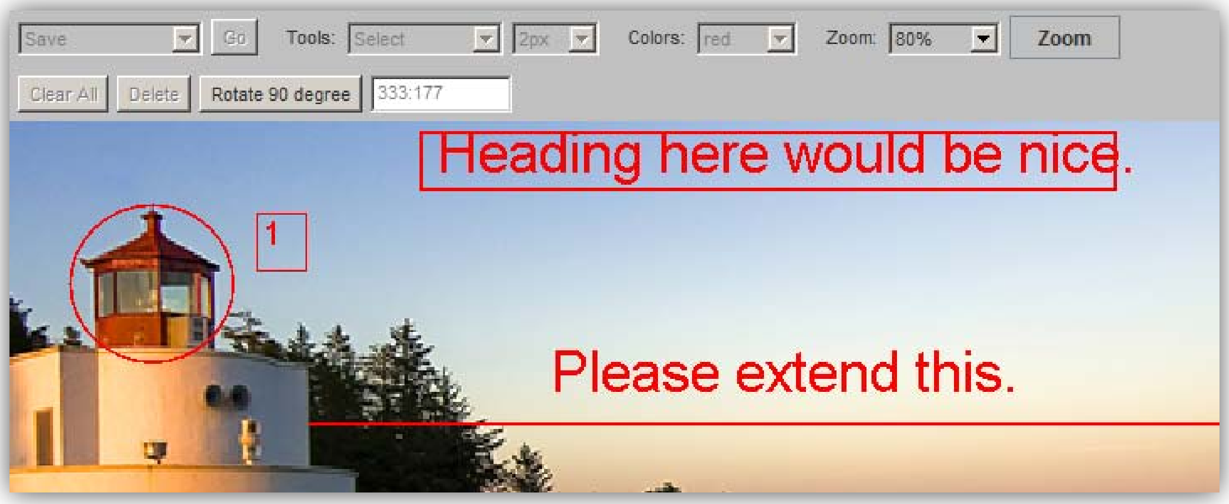
1. Adds 1 to the current version.
2. Records the current time and date.
3. Changes the state of the job to *Waiting on App* in the *Current Jobs* screen.

NOTE: Make sure you click on *Submit New Artwork* immediately after you change any of the text fields, otherwise these changes will not be recorded.

The commands on the *Detailed Job View* screen do the following:

1. **Back to Job List** – Takes you back to *Current Jobs* screen.
2. **History** – List of all versions the current job has been through.
3. **Upload Files** – Upload or attach files to the current job.

To view the full graphics with the customer's comments overlaid, click on the graphics thumbnail located at the bottom right hand corner of the *Detailed Job View* screen.
This will open up the *Artwork Detail* screen with the customer's corrections in red as per the figure below.



The commands on the *Artwork Detail* screen do the following:

1. **PDF**– Opens in a new window the PDF image file without corrections.
2. **Print Preview Version** – Opens in a new window a ready-to-print PDF version of the image file with customer corrections.
3. **Clients Dot Points** – Opens a text version of all the customer's corrections.

Insert Graphics (without Advanced Drawing Tools)

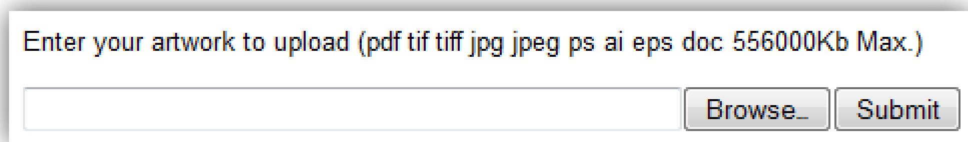
To insert graphics do the following:

1. Click on a *Customer Name*.
2. Click on *Upload Files*.
3. Type in the following fields:
   - **Small** – Image size in dpi (PDF) or pixels (jpeg, tiff) for the small view
   - **Medium** – Image size in dpi (PDF) or pixels (jpeg, tiff) for the medium view
   - **Large** – Image size in dpi (PDF) or pixels (jpeg, tiff) for the large view
   - **Type** – Image file type. Choices are JPEG, PDF, TIFF.

NOTE: For other file types please contact Pent Net.

4. Click on *Submit* to see the *Upload Artwork* screen below.

NOTE: If you choose *Attach* this does not create a thumbnail but merely attaches your chosen file to the other files list in the detailed job screen.



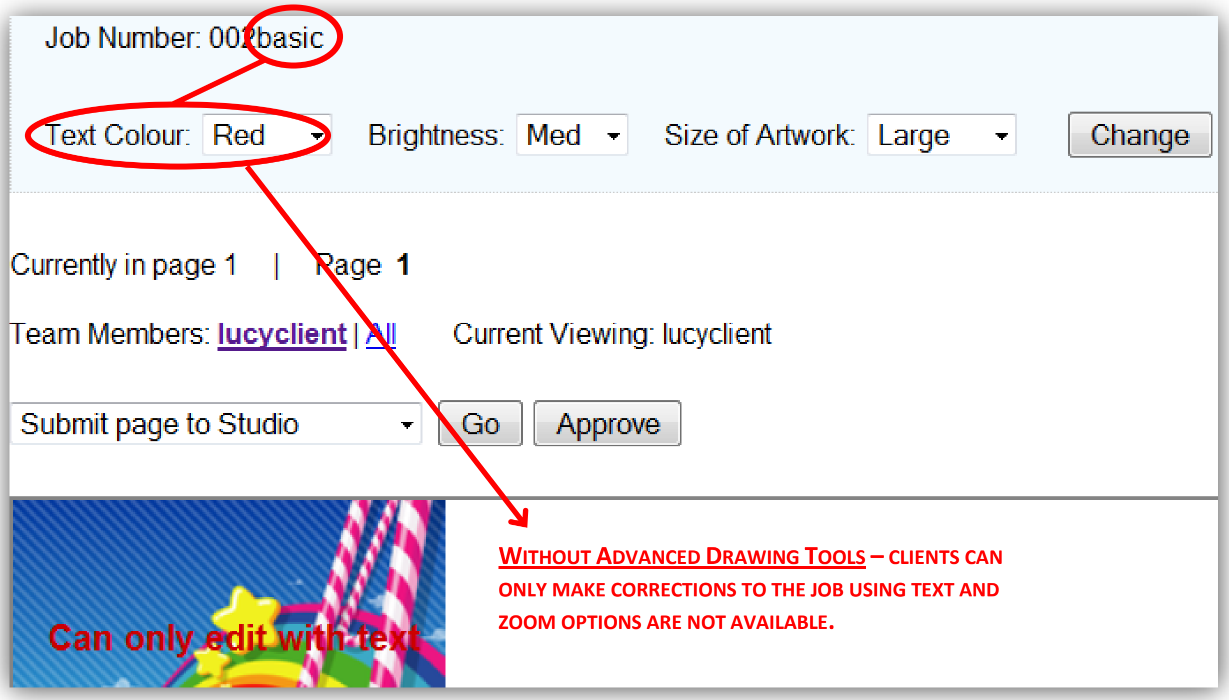
5. Click on *Browse* and choose a graphic file to upload from your computer.
6. Click on *Submit.*
7. Click on *Confirm Upload.*
8. Click on *Submit New Artwork* to submit the proof to the client.
9. Choose whether to send an alert email to the client by selecting/deselecting the checkbox.
10. Click on *Submit*.
11. Click on *Back to list* to return to *Current Jobs* screen.

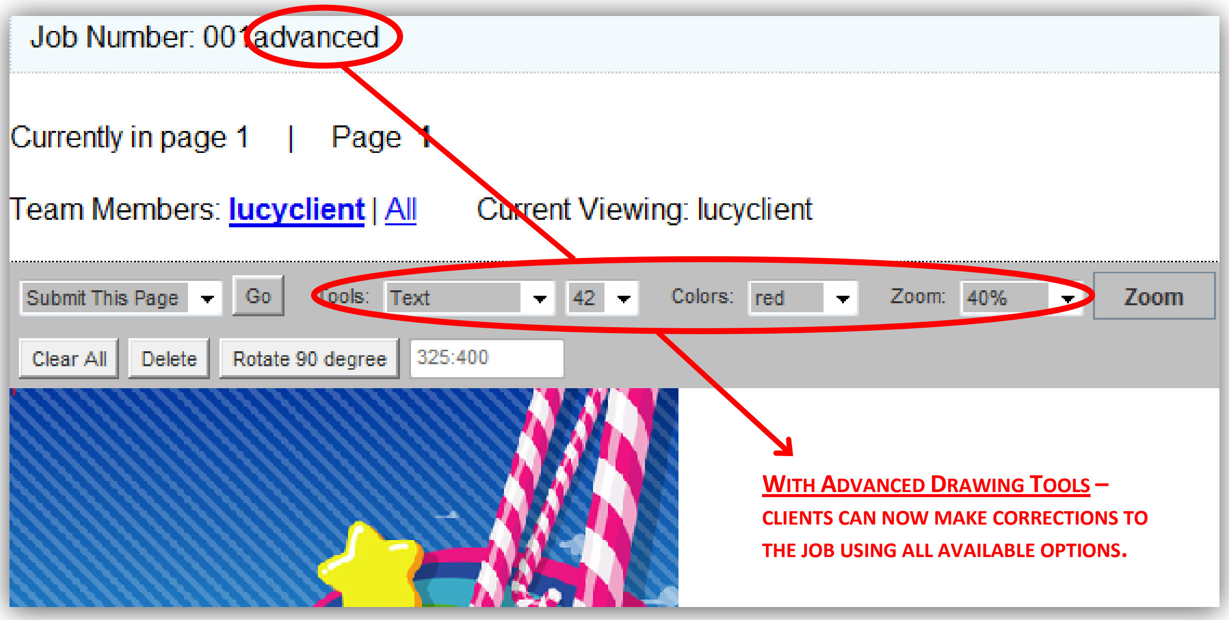
Insert Graphics (with Advanced Drawing Tools)

To insert graphics do the following:

1. Click on a *Customer Name*.
2. Click on *Upload Files*.
3. Type in the following fields:
   - **Size** – Image size in dpi (PDF) or pixels (jpeg, tiff).
   - **Type** – Image file type. Choices are JPEG, PDF, TIFF.
4. Follow through steps 5-11 from: Inserting Graphics (without Advanced Drawing Tools).

Difference between Basic and Advanced Drawing Tools

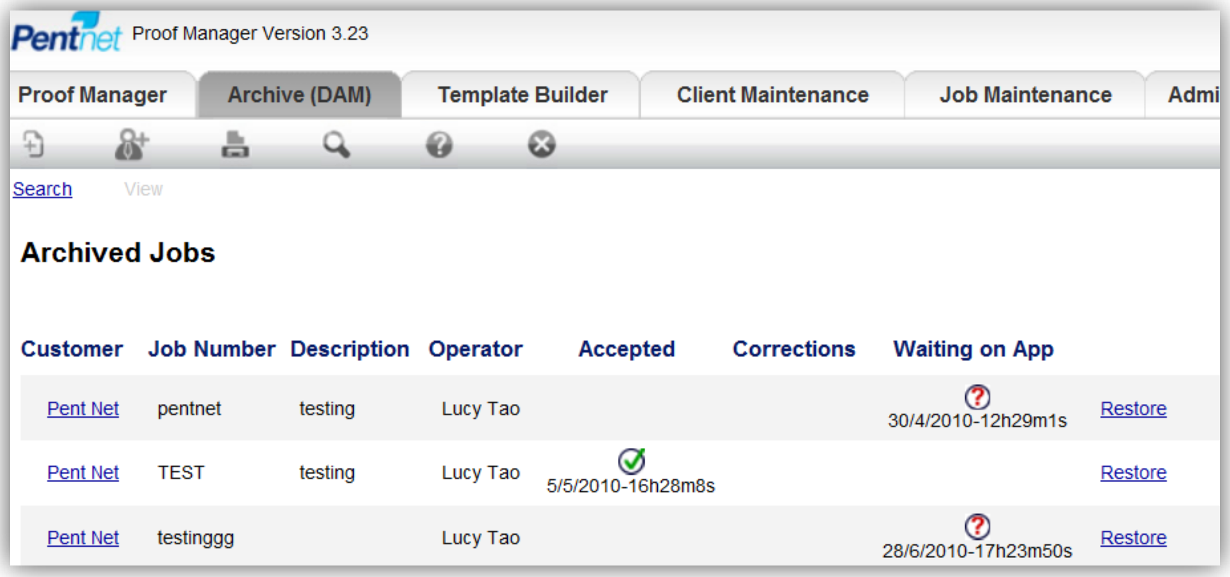




Section 3: Archive (DAM)

Archived Jobs

Under the *Archive (DAM) tab*, you will see the *Archived Jobs* screen.



This screen lists all archived jobs. Every job is on a separate line showing the following titles:

1. **Customer –** The company name associated with that login
2. **Job Number –** The unique code chosen by the studio should be consisting of: letters, numbers, underscore only.
3. **Description –** Job description entered by studio.
4. **Operator (can be Client) –** Display name of the studio which created this job.
5. **Accepted –** Status for jobs approved by client (with time and date of approval).
6. **Corrections –** Status for jobs with corrections marked by client (with date and time of mark-ups sent to studio).
7. **Waiting on App –** Status for jobs submitted to client and waiting on client action (with date and time of submission).

Search Archived Jobs

To search through archived jobs:

1. Click on *Search*.
2. Input your search terms in ONE field only.
3. Search either via: job number, customer name or description.

View/Download an Archived Job

1. Click on the customer name corresponding to the job.
2. Click on *View* located just under the tab.
3. In the job details screen, click on the thumbnail to view the job in an applet.
4. Click on *Download File* to download a PDF version of the file.

Restore an Archived Job

1. Click on *Restore* corresponding to the job.
2. Once the job is restored, you will land in the Job Maintenance screen with that job highlighted.
3. The job will also now appear under the current jobs screen as the most recent job.

Section 4: Client Maintenance

Add a New Client

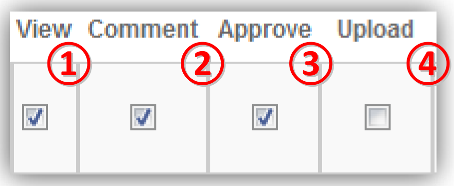
To add a new client:

1. Click on *Add Client* in the command bar.
2. Enter the necessary information in the text fields.
3. Choose a banner from the drop down list.
4. Click on *Submit*.
5. Click on *Submit Email* to send a notice to the client's email address.
6. Click on *Return to Client Maintenance* to edit a client's permissions.

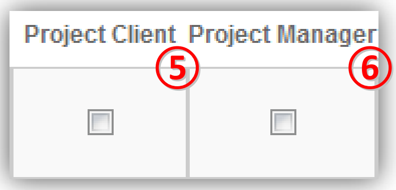
Edit Client Permissions

To manage a client's permissions:

1. Select a client and click on their login name.
2. Click on *Edit* in the command bar.
3. In the next screen, there are 15 checkboxes to select or deselect in order to set permission for a client to:

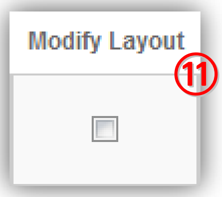


1. View jobs.
2. Comment on jobs.
3. Approve jobs.
4. Upload files to the studio.

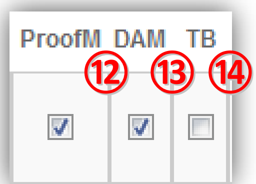


5. Become a Project Client.
6. Become a Project Manager.

7. Receive emails for All Events
8. Receive emails for Approvals
9. Receive emails for Comments
10. Receive emails for Revisions



11. Modify the layout of template builder jobs.



12. Allows the client to view Proof Manager jobs.
13. Allows the client to access Digital Asset Management.
14. Allows the client to access template builder.

Delete a Client

To delete a client:

1. Select a client by clicking on their login name.
2. Click on the *Delete* link corresponding to that client.

Section 5: Job Maintenance

Add a New Job

To add a new job:

1. Click on the *Add New Job* active button on the screen.
2. Select either proof or template from the drop down list.
3. Enter in all necessary information.
4. Click on *Add Job*.
5. It should now appear as the first job in your *Current Jobs* screen.

Delete a Job

To delete a job:

1. Click on *Delete/Archive* link corresponding to the job you want to delete.
2. Click on *Delete* to confirm.

Archive a Job

To archive a job:

1. Click on *Delete/Archive* link corresponding to the job you want to archive.
2. Click on *Archive* to confirm.
3. If you have purchased the DAM module, an archived job is available to your clients for reorder or repurpose under the Client Digital Asset Management module.

The commands on the *Job Maintenance* screen do the following:

1. **Edit Job –** Allows you to edit the: company, description, version, login and operator of an existing job (a job must be selected).
2. **Clone Job** – Allows you to clone a job by changing to job number (a job must be selected).
3. **Job Report** – Generates a job report in text form.
4. **Time Report –** Generates a time report in text form.
5. **Batch Upload** – If this function is purchased, the Batch Upload button process all files in the drag and drop hot folder.
6. **Clear Studio Logs** – Choose a login name and click on *Clear*. This will eliminate the need to wait 15 minutes if a studio user has not logged out properly.
7. **Mail Log** – Generates a list of all the emails sent through Proof Manager in text form.
8. **Import Data 1/2** – Imports external data into the Proof Manager system.

Section 6: Admin

Send Email to all Clients

1. Click on *Send Email to all clients*.
2. Select or deselect clients by clicking on the box beside the client's name located to the left side of the screen.
3. Enter the necessary information in the email template.
4. Click on *Send Email*.

Client Banner

1. Click on *Client Banner*.
2. Click on *Browse* and choose a banner to upload from your computer.
3. Click on the *Upload* button.
4. Click on the *Client Maintenance Tab*.
5. Select a client.
6. Click on *Edit*.
7. In the following screen, select your uploaded banner image from the drop down list.
8. Click on *Update*.

NOTE: Our default banner sizes are 65 pixels x 3000 pixels. This is to ensure that most screen resolutions will view the banner properly. Images of a smaller size will automatically be tiled across the banner area so your banner would keep repeating itself. We advise that your banners have the logo on the left and a single colour is chosen for the background as the page does not automatically resize banners and will cut off any graphics/designs according to screen resolutions.

New Client Settings

To change client settings:

1. Click on *New Client Settings*.
2. Select or deselect the boxes under each setting.
3. To delete all changes click on *Reset*
4. To save all changes click on *Update*.

NOTE: Once you click on *Update* you cannot reset your changes.

Studio Email/Password

To change studio name and email:

1. Click on *Artwork related Email/Studio Passwords*.
2. Make all desired changes.
3. Click on *Submit Change*.

Upload Signature

1. Click on *Upload Signature*.
2. Click on *Browse* and choose a jpeg file to upload from your computer.
3. Click on *Upload*.

Language

This contains a comprehensive list of the text labels for the system interface that you are able to customise. In the *Customised* text field, input your desired changes and click on *Change*.

Section 7: Brand Manager Workflow

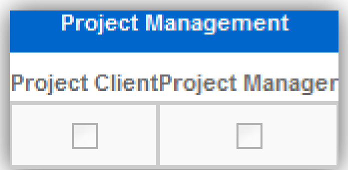
An extension of Proof Manager

The Brand Manager module is an extension of Proof Manager – it allows the studio to assign a template to a group of clients with one client (the “Brand Manager”) designated as the funnel between the project group and the studio. Essentially, the Brand Manager module is an extension that further supports and encourages online collaboration between team members.

Client levels: Proof Manager, Project Manager, Project Client

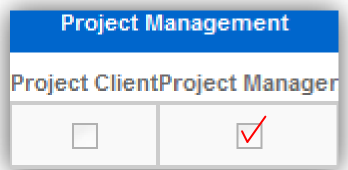
Under client maintenance, every client can be set either set as a:

Proof Manager



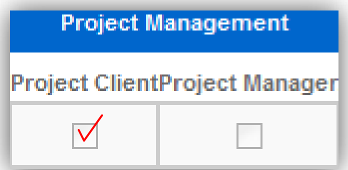
Leave both checkboxes empty.

Brand Manager



Select the checkbox under “Project Manager”.

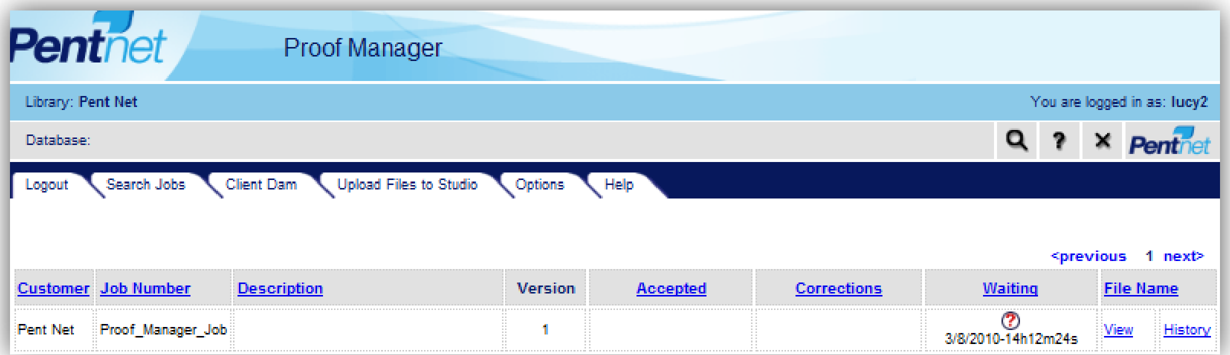
Sub-Member



Select the checkbox under “Project Client”.

Proof Manager

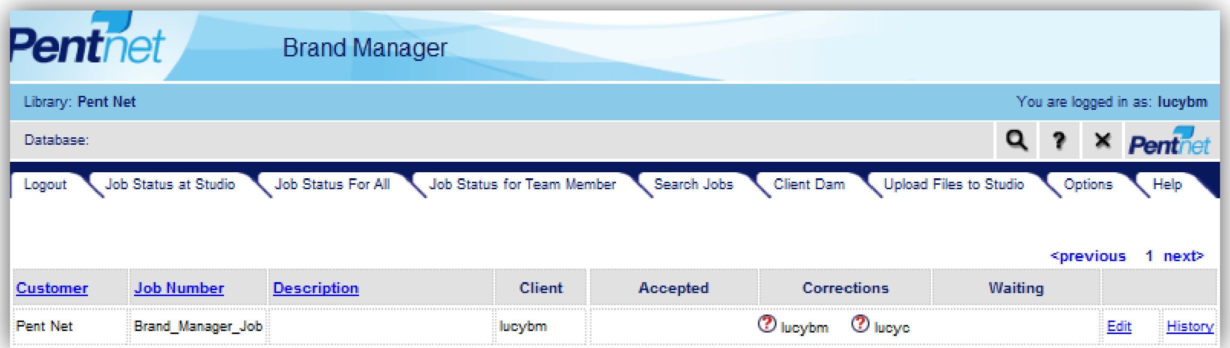
The login screen:



1. Can view, comment and approve jobs.
2. Any changes submitted by the Proof Manager will directly be sent to the studio.
3. Job status changes are simultaneous between the Proof Manager and studio screens – once the proof manager submits a correction, the studio will be alerted.

Brand Manager [Project Manager]

The login screen:

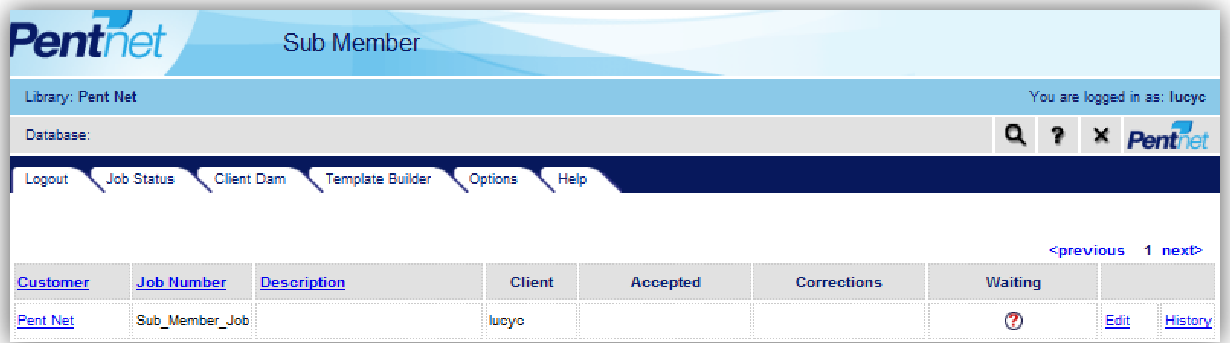


1. Screen displays a merged status field, showing the status of all team members.
2. Possess all the permissions of a Proof Manager along with the ability to view the comments and mark-ups of ALL Sub-Members attached to a job.
3. Has the ability to send comments and mark-ups to team members only without alerting the studio.
4. Acts as the funnel between the studio and team members – only the Brand Manager can submit changes to the studio and affect the job status on the current jobs screen.

NOTE: Brand Managers cannot make changes/markups on team members' screens – only has the permission to view other members' corrections.

Sub-Members [Project Client]

The login screen:



1. Can view, comment and approve jobs – but comments/markups/approvals will only alert the Brand Manager and have no effect on the job status on the studio side.
2. Has the ability to view comments and markups of all members attached to the job.