



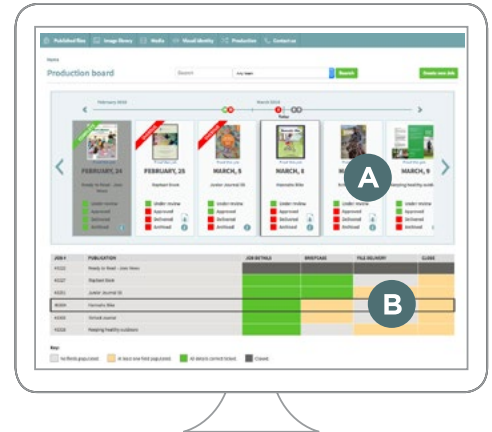
Uview Production Board

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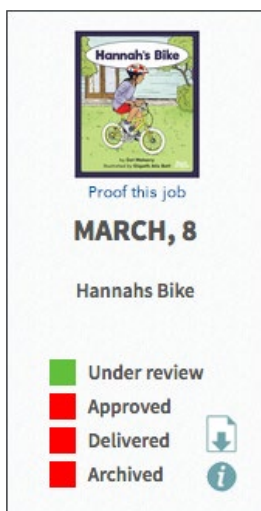
Uview Production Board Overview

The Uview Production Board gives administration teams a comprehensive view of current live work that is being reviewed. It also gives the designer the ability to save and archive documents with a job and deliver and archive the approved file.



- A** The job tickets on the timeline give you a snapshot of a proof, and where it is at in the sign-off process.
- B** The job table below are tabs where you can fill out information about the job, keep track of time, deliver the final approved file, and close and archive the job.

Job tickets



Job tickets display live information about the job. Below is a list of what is displayed, and their functions:

- **Thumbnail/image** - a link that takes you to the reviewing platform.*
- **Due date** - when the job is to be completed by.
- **Title** - title of the document.
- **Under review** - highlighted green when the file is under review.
- **Approved** - highlighted green when the file has been approved.
- **Delivered** - highlighted green when the approved file has been delivered.
- **Archived** - highlighted green when the job has been closed and archived.
- **Download icon** - view or print the current unapproved version.
- **Info icon** - displays who the designer, approver, and reviewers are, who the proof is waiting on, and what version the proof is up too. A **NUDGE** button is also available to notify people that they still need to finish reviewing.

NB: A Uview user will only see jobs they are associated with on the production board. If you are an administrator, you will see all your organisations jobs. However, even as an administrator, you may not have access to review all the proofs.

* You only have access to review a job if you have been assigned as a designer, reviewer, or an approver.

Job table

JOB #	PUBLICATION	JOB DETAILS	BRIEFCASE	FILE DELIVERY	CLOSE
4022	Ready to Read - Jane News				
4027	Pushcart Book				
4029	Junior Journal 30				
4034	Junior Journal 30				
4080	School Journal				
4084	Reading Healthy outdoors				

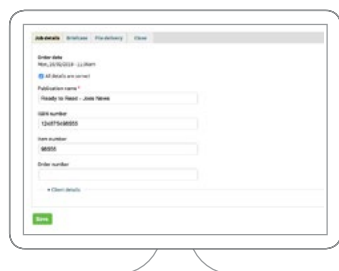
The job table allows you to store job information about the job. You can upload files to the briefcase, deliver the approved file, and close and archive the final design files.

- **Job details** - is where you can enter job and client information.
- **Briefcase** - gives you the ability to upload files relating to the job, such as database spreadsheets, quotes, and any other information you may want to store and archive with the job.
- **File delivery** - allows you to deliver the final approved file once it has been approved by the reviewers and approver. There is also instruction and a link on how to withdraw an approval.
- **Close** - is where you upload the final design files to archive, once the job is complete.

NB: 'Job details' and 'Briefcase' cells are default green when a new job is started. The 'File delivery', and 'Close' tabs automatically turn green upon sending or closing. When the job is closed and archived, all cells and job ticket turn grey.

Job tabs and their function

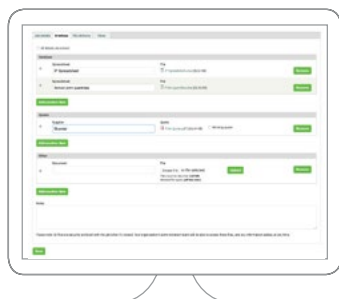
The production job tabs is where you go to add any information about the job while the job is in the reviewing process, and to deliver and archive the file when the job is approved.



Job details

The Job details tab allows you to fill out client, and job information relating to the job or project.

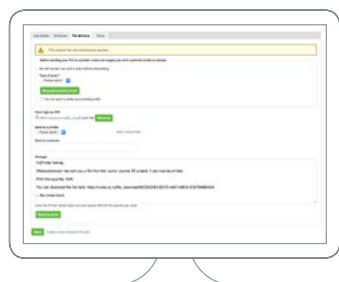
NB: The Job Details tab is default green on the production board table when you start a new job. The 'all details are correct' is ticked.



Briefcase

The Briefcase allows you to upload files, and take notes relating to the job or project. The files you might want to upload may include database spreadsheets, quotes from suppliers, or any other documents you want to archive with the job.

NB: The Briefcase tab is default green on the production board table when you start a new job. The 'all details are correct' is ticked.



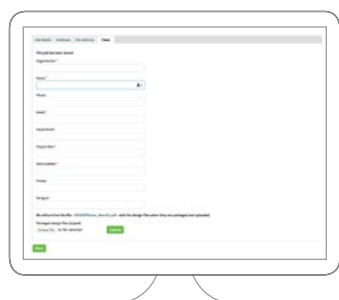
File delivery

When the proof has been approved, the file is delivered to the File delivery tab. You can request Uview to print a hard proof by selecting the proof type, filling out the delivery details, and clicking on [Request printed proof](#) . If you don't want a hard proof, you can skip this step and send the file directly to your selected printer, or client.

The file delivery tab is also where you go to withdraw an approval, see page 8.

For more about the process when a printed proof is requested, see the Q&A section on page 9 for more information.

NB: You can edit the message that includes the download link, and attach any file from the briefcase when you send your file to your printer.



Close

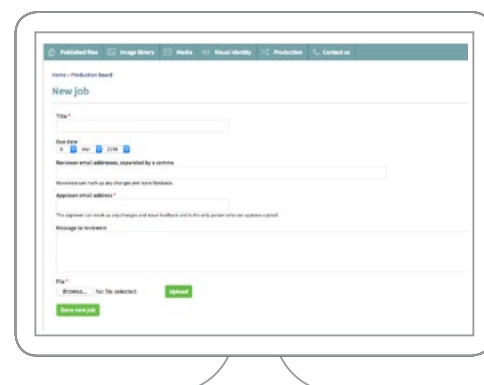
When the job is complete, and all the job table cells are labeled green on the production board, the designer will know to upload the packaged design files in the Close tab. When the upload has finished and all mandatory fields are filled out, click on the [Save](#) button, and your archived files will be sent to Uview for archiving and uploading to Published files.

NB: The Close tab will automatically save and close upon completion.

Starting a new job

If you have a job ready to go, simply click on the [Create new job](#) button on the production board. You will then be asked to fill in the following:

- Title
- Due date
- Reviewer(s) – usually a client(s) or an editor
- Approver – usually the project manager
- Message to reviewers - a message to everyone
- File upload



When adding reviewers and approvers, enter their email address. Both reviewers and approvers are notified via email when it is their turn to review the job.

You can have as many reviewers as you like, but only one approver. If you are seeking approval from only one person, add them as the [Approver](#). See page 6 for more information about the process, and reviewer/approver roles.

Once you have finished filling out the fields, and uploaded your high resolution print ready file, click on the [Save new job](#) button. Thats it! Your job has started!

Starting a job from 'Published files'

If you want to make changes to an already archived job in Uview, and have it reviewed on the production board, you will need to retrieve the files from Uview and add the job to Studio jobs.

Firstly, locate the job in 'Published files' and click on the 'Add to cart' button, and then click 'Checkout'.

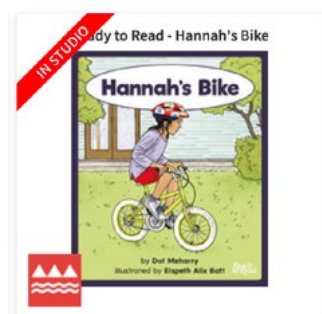
On the right of the resource you will see several options, click on the following:

Order Items				
	TITLE	TYPE	DESCRIPTION	FORMAT
	Ready to Read - Hannah's Bike	Publication	312037-061	<input type="checkbox"/> High resolution images <input checked="" type="checkbox"/> Native design files <input type="checkbox"/> Print ready PDFs <input type="checkbox"/> Send to Uview for changes <input checked="" type="checkbox"/> Send to your studio for changes <input type="checkbox"/> Other

You will be asked who to send the design files to, and who will be involved in the reviewing process.

The fields for the design files are mandatory, but if you are not sure who the reviewers will be at this stage, don't worry, you can add their email addresses in later in Studio jobs.

Once you click 'Submit order' Uview will be notified to retrieve the archived design files and send a download link to the person outlined. The job itself will be sent to 'Studio jobs', under 'Production' in your main menu. When the designer is ready they can then add in the necessary reviewing information, (if not there already), and upload the print ready file to start the reviewing process.



When a job has been ordered for changes and sent to 'Studio jobs', the job in 'Published files' will no longer be available to order, it will be marked as 'In Studio'. The resource will only become available again when the job has finished the reviewing process and been closed, and archived.

When closed and archived the new design files are sent to Uviews archive portal where the job is processed, re-archived, and updated in 'Published files'.

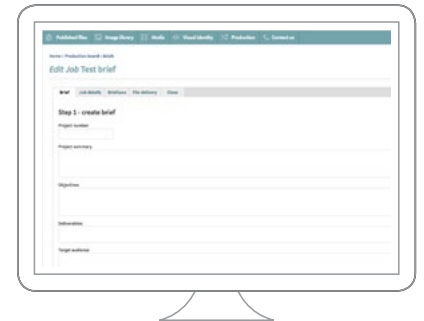
NB: If only 'Native design files' are ordered, the resource will be marked as 'Unavailable' on Uview. The resource will only become available again when new files are uploaded via the Uview archive portal.

Briefs

Creating a brief allows the production team, and persons involved in the project to organise information about the new job before it goes to the designer.

It gives you the chance to fill out important information about the job required, such as Project Summary, Objectives, Deliverables, and Target Audience. From the brief tab the designer can then start the approval process.

To start a new brief go to [Production > Briefs](#) from the main menu and click on the [Create new brief](#) button. The only information you need to start a brief at this stage, is the title.



Step 1 - create a brief

Once you click [Save as brief](#) you will be redirected to your brief where you can start adding in the necessary requirements for the job.

As you add information to the brief, be sure to click 'Save'.

Steps 2 - add people

Add the email addresses of the people who will be involved in the reviewing process and add the delivery date of when the final approval must be made by. For more information about reviewers and approvers, go to page 6 of this guide.

Steps 3 - start job

When the brief is complete, notify your designer and they can review the brief and start the design process. When the designer is ready to upload the file (or files) for reviewing, they can complete **Step 3** by uploading to start the reviewing process.

From this point the brief will close and the files for review will be moved to the production board.

Who has access to the brief?

- [Uview Administrators](#) have full access to the brief.
- [The Approver](#) has access to the brief and also has the ability to edit and upload documents.
- [Designers](#) can also access the brief, but they cannot edit the information. They do however have access to **Step 3**, the file uploading section to start the approval process.

Q&A - Can external suppliers access the brief? and start the approval process?

Access can be given to external contractors, e.g. designers, so long as they have a Uview login, and you have assigned them to a "Supplier enhanced" role. Only then can they access the brief and start the reviewing process.

The approval process and guidelines

Once the **designer** has started a job via the Uview Production Board or by starting it from a brief, the **reviewers** will be notified via email to review the proof and mark up any changes.

When they have finished and clicked the finished button, the **approver** is then notified to check the proof.

The **approver** can then lock the proof so no more alterations can be marked up. They can then check over the comments made, and send the TO-DO list back to the **designer**. This process is repeated until the proof is approved.

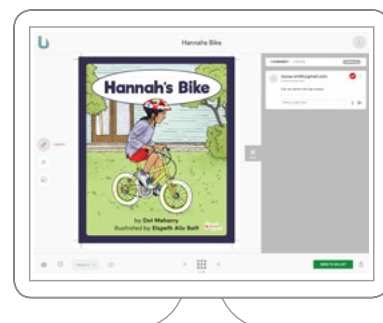
Q&A - What's the difference between the designer, reviewer and approver?

- The **designer** starts the job, and uploads new versions to the file after others have reviewed.
- The **reviewer** marks up any changes on the proof and sends their alterations to the approver.
- The **approver** marks up changes, and sends all the reviewers changes back to the designer. The approver is the only person who can give final approval on a proof.



Receiving a proof

When you receive a proof invitation email, click **View Proof**.

We will automatically create your account and keep you logged in. If you change your browser or device you originally used to view the proof, you will be asked to log in – but don't worry, click forgot password on the login screen to set a password for yourself that you will remember.




Adding a comment (Reviewers and Approver)


To add a comment, select the red pen  tool on the left and highlight where you want the change. Type in a message on the card, and send using the green dart icon .

If you are wanting to raise a question with another reviewer, approver, or the designer, simply type the "@" symbol in the message. A drop down list of everyone involved in the job will be displayed, and you can select the person, or persons you want included in the message.

When you are finished, click the green **Finished** button.

Returning a TO-DO list (Approver)



When reviewers are finished reviewing the proof, and comments have been added, it is time for the approver to return a list of comments to the designer as marked red to-dos. .

Open the proof and select lock for review - this takes the red pen  away from other reviewers so they can not add further comments.

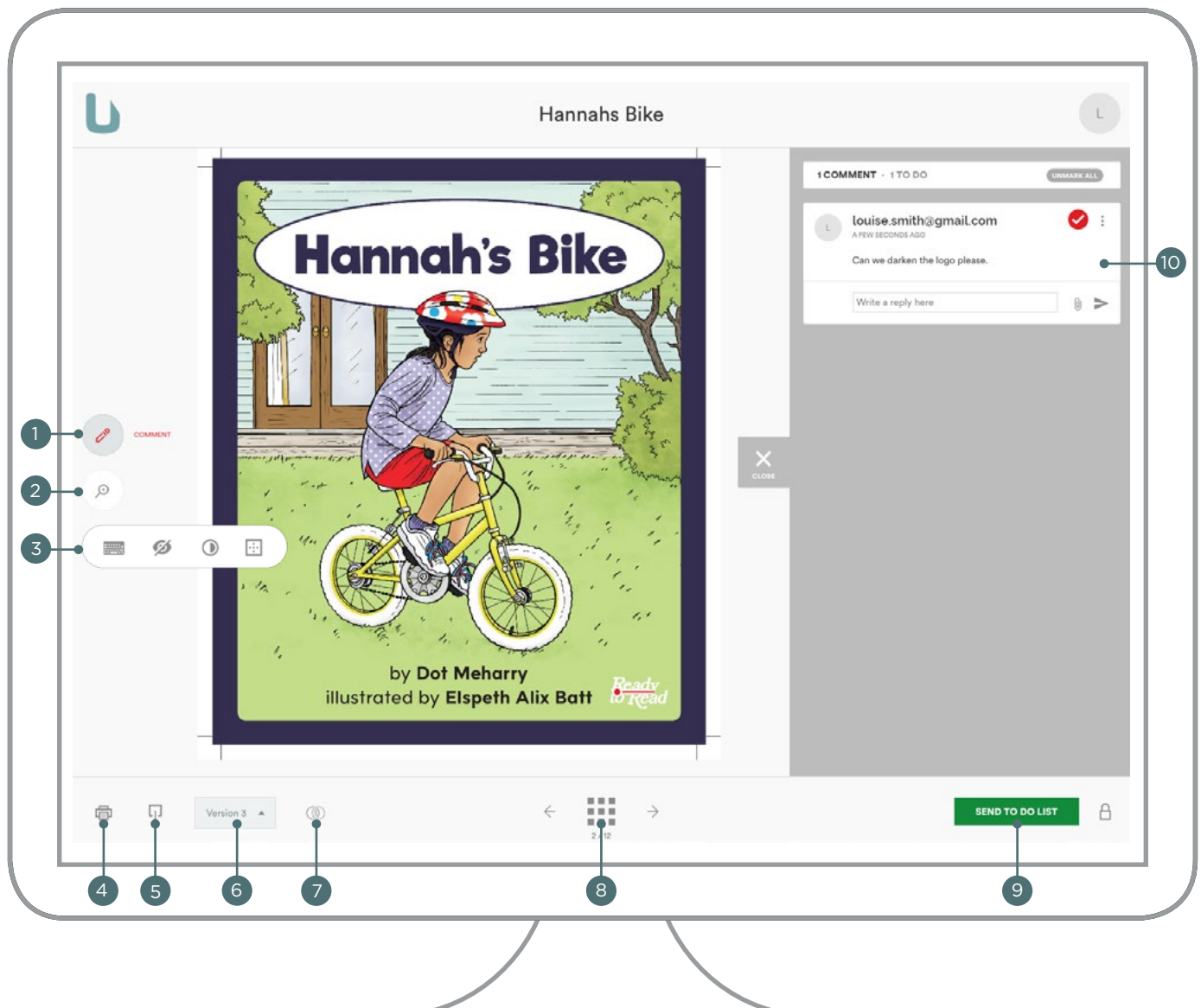
NB: Mark each comment is a red to-do . Comments you don't want actioned leave gray .

When you have finished reviewing, and checked other comments, click the green **Send To-Do List** button. If there are no To-Dos, and you want to approve the file, click the green **Approved** button.

Requested changes (Designer)

When your reviewers and approver have finished marking up their changes, you will receive an email with a link back into Pageproof. As you make the changes in your design application mark all the red to-dos  as a green done . When you have finished, upload the new file and the process will start again.

Reviewing platform



- 1 Comment Tool - to add a comment, select the red pen tool, click on the proof and write your comment. Use the @ symbol in your comment to mention another reviewer.
- 2 Zoom Tool - click the zoom icon to view the proof in more detail, or rotate the proof.
- 3 Magic Tools - click here to view tools to enhance your user experience.
- 4 Print comments - click here to print out comments made for that version.
- 5 Download file - click here to download the current file.
- 6 Version number - here you can view the current or previous versions with all the previous comments.
- 7 Compare - here you can compare the different versions of the document, and using Smart compare you can overlay the versions to highlight where the changes were made.
- 8 File pages - click here to view all the pages in the document, or use the left and right arrow keys to scroll through page by page.
- 9 Action button - if you are a reviewer a **FINISHED** button will be displayed. If you are an approver a **SEND TO DO LIST** or **APPROVED** button will be displayed depending if there are changes to be made.
- 10 Comments - all comments are displayed down the right hand side. Clicking on the comment card will take you to where the comment was made. You also have the option of uploading attachments to the comment, for example a new link.

Q & A

Below are some questions and answers you may have which will help you learn about Uview. If anything is unclear about the online reviewing process, this short video may help as well. ([view here](#))

How many reviewers and approvers can I have?

You can have as many reviewers as you like, but only one approver. If there is only one person reviewing the job, simply put them as the approver.

Do the reviewers and approvers have to be registered Uview users?

No, reviewers and approvers **do not** need to be registered Uview users to review or approve a job.

For print jobs, why do I need to upload high resolution files for review?

For printed resources, you must upload the high resolution print ready file to be reviewed, as this will be the file that is sent to the printer from the 'File delivery' tab once approved.

Why can't I access a proof?, it says "Oops. You're not on this proof."

You only have access to a proof if you are assigned as the designer, reviewer, or approver of the job.

Why can't I see the Production Board table?

Administrators and Staff Enhanced roles are the only users who can view and access the table.


How do I use the proofing page, I'm not sure what to do?

When you have your proof open, simply click on the pen tool on the left. When it is red, you can highlight where you want the change, type in a message on the card, and send using the green dart icon. Once you have finished reviewing, click on the 'Finished or Send To Do List' button. For more help, see the Reviewers Guide on the Production Board, or page 6 of this document.


How do I upload a new version after I have made the requested changes?

Once you have worked through all the changes and ticked them off in Pageproof, simply click on the 'Add new version' button at the bottom. The system will then take you back into Uview to upload a new version.

How do I withdraw an approval? or upload a new file after it has been approved?

Go to the Uview production board, find the resource, and click on the 'File delivery' tab. Here you will find the 'Withdraw approval' button and some instruction on the process, clicking on this button will take you to your proof. Click on the information icon on the left will bring up the job settings and workflow. This cog icon  when clicked will bring up the option you need to withdraw the approval.

NB: It is very important at this stage when withdrawing the approval to make sure you leave a message to the approver explaining why you are withdrawing. Once the approval has been withdrawn close your browser tab and wait for changes to be marked up by the approver.

If you need to upload a new file straight away, click the cog icon  options again and click 'Upload a new version'. You will be taken to an area where you can drag and drop your new file.



What do I need to supply when closing a job?

In the Close tab you will need to fill out the fields required and attach a zip file of the packaged design files. Packaged design files include, design files, fonts, and links. You also have the option of archiving just the final file as well, but it is safer to archive the complete job for piece of mind.

What file types can I upload for proofing?

Files from Adobe Acrobat PDF, Microsoft Word, Power Point, Excel, and Adobe Photoshop are all supported. You can also upload Video and Audio files, mp3, mp4, mov, and avi.

How do I assign a new designer or owner to a job?

If you are the current designer you can do this by clicking on the information button , under 'These people own the proof' click on the add icon  and add the new designers emails address. The new owner will be notified and they can then take over the job.

If the current designer is unavailable, and you need to remove them from the job, you can contact Uview and we can assign the new designer for you.

How do I send another invitation to a reviewer, to review a proof?

If a reviewer or approver cannot find the email they received to review the proof, you can utilise the **NUDGE** tool on the Production Board. Hover over the information icon on the job ticket, wait for it to load, and nudge that person. They will receive a reminder and the link they need to access the proof.

How do I bypass a reviewer in the approval process?

If a reviewer is unavailable to review a proof, or they are not responding to any review requests by nudging, you can utilise the SKIP tool in the reviewing platform. Click on the information icon in the reviewing platform of that job and skip or remove that person.

What happens when I request a Uview printed proof?

You may want your client to view a printed sample before final signoff and before sending to print. Uview has three options available. **Roomproof**, **Dylux**, or a **Digital mockup**.

Digital mockup: This proof is a digitally printed mockup, or sample of what your job will look like once printed and bound.

Roomproof: This proof is printed on a high quality coated satin stock giving you an accurate example of what your job will look like off the printing press. These are printed out as readers spreads.

Dylux: This proof is printed on an uncoated matt stock, and is good for checking content rather than image quality. These are also printed out as readers spreads.

After you select which proof you want, you will be asked who we are sending the proofs too. Click on the Request printed poof button and a representative will contact you with a cost for this proof before proceeding.

Your organisation may already have an agreed rates card, if this is the case we will get the proof started straight away.

When you request a proof, the approved file becomes unavailable to send to print in the file delivery tab. You can only send to print once the proofs have been approved.

On the right is a sample of what the label on your proof will look like when you receive it.

No changes to the proof?

You can now locate your file on the Uview production board, click on the file delivery tab and click **“Approve printed proof”**, and sent to print.

Changes to the proof?

If there are changes at the hard proof stage, your client needs to mark these up on the proofs and return them to the designer. The designer will then need to ‘Unapprove’ the proof on the Uview Production Board, take in the changes and return the proofs to the client for final sign-off.

Take these steps:

Step 1 - go to the Uview Production Board and locate your job.

Step 2 - click on the ‘File delivery’ tab.

Step 3 - click **“Unapprove printed proof”**.

(At this point the approved file that was used to create the proof is removed from the file delivery tab).

Step 4 - take in the requested changes that are marked on the proof.

Step 5 - print out the pages that have the changes and staple them to the corresponding page.

Step 6 - return the proofs to your client for final sign-off.

NB: If the changes are minor, it may not be necessary for the client to return the proof to the designer, a PDF of the change emailed to the client may be sufficient. Either way, it is **imperative** that the designer clicks the **“Unapprove printed proof”** button before taking in any changes.

Once you have final approval from your client, upload the new final print ready PDF to the ‘File delivery’ tab, and ‘Save’. You can then send your file to the printer.

Printed proof label

An example of process

The example below of a Uview job in production from start to finish, is a guide only. There will always be internal processes that will be different from organisation to organisation, this is a guide only.

Please note, if a brief is not required, the designer would start the job at **Step 5**.

Step1 - A production team member (Sarah), starts a brief.

Step2 - Sarah fills out any relevant brief information, (**Step 1** in the brief), and includes who the approver and reviewers are, and who the designer will be, (**Step 2** in the brief).

Step3 - The Approver, who gives final sign off on the job can also edit the brief, outlining such things as Project summary, Objectives, and Deliverables, and can supply the designer with any necessary documents needed for the design.

Step4 - Sarah notifies the Designer that the brief is ready, and that they can start with the design.

Step5 - The Designer, when ready, uploads the final high resolution, print ready pdf and starts the approval process.

Step6 - The assigned reviewers, approver, and designer, work through the approval process using the Pageproof system.

Step7 - Meanwhile Sarah works through the Production Board table, uploading important documents into the Briefcase, and adding any other relevant job information in the other available tabs.

Step8 - When final approval has been given via Pageproof, the high resolution print ready pdf file is then delivered to the 'File delivery' tab on the Production Board.

Step9 - Sarah delivers the high resolution, print ready pdf file to the printer using the 'File delivery' tab. (A Uview printed proof can also be requested at this stage, see Page 9).

Step10 - Once the job has been printed and signed off, the job is now ready to be closed and archived. The designer can then upload the design files to the 'Close' tab to close the job.

Some jobs don't require the design files to be uploaded, so in this case Sarah also has the option of just archiving the final PDF.

NB: If a Uview printed proof was requested in **Step 9**, and there were changes to be made to the proofs, the designer would need to 'Unapprove' the printed proof on the production board before taking in the requested changes.

See '**What happens when I request a Uview printed proof?**' in the Q&A section on Page 9 for more information.