# Uview Production Board

Contents

V6.0

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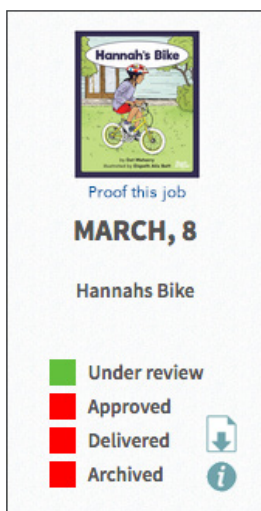
Job tickets display live information about the job. Below is a list of what is displayed, and their functions:

- **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.
- 🔽 - view or print the current unapproved version.
- ℹ️ - 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.

Note: 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

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.

Note: '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 job tabs on the production board is where you go to add further information about the job while it is in the reviewing process. It is also where you go to deliver and archive the file once the job is approved.
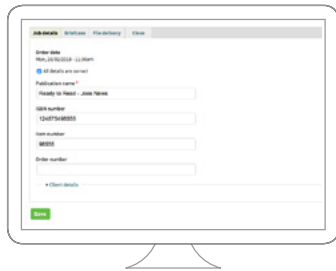
Job details

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

Note: The Job Details tab is default green on the production board table when you start a new job.
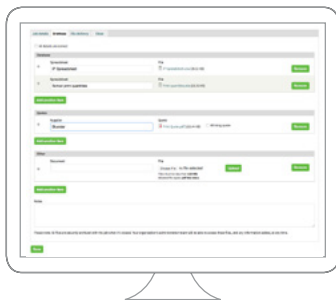
Briefcase

The Briefcase allows you to upload files, and add 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.

Note: The Briefcase tab is also default green on the production board table when you start a new job.
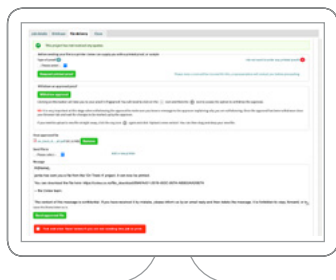
File delivery

When the proof has been approved, the file is delivered to the 'File delivery' tab. Here you can request Uview to print a hard proof (a physical printed proof), withdraw the approval, or send the approved file to a printer.

If you don't want to select any of those options you can simply tick the available red box and click 'Save'.

For more about the process when a printed proof is requested, see the Q&A section on page 15 for more information.

Note: 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 for archiving. After uploading the files and entering the details, click on the '**Save'** button. Your archived files will be sent to Uview for archiving and uploaded to your Published files.

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

Starting a new job for review

If you have a new job ready for review, simply click on the **Create new job** button on the production board, you will then be asked to fill in the following information:

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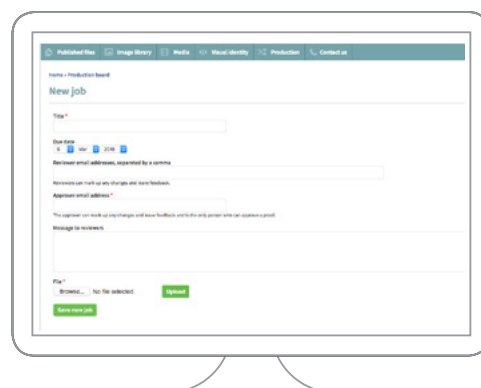
When adding reviewers and approvers, enter their email address. Both reviewers and approvers are notified via email when it is their turn to review the job.

You can have as many reviewers as you like, but only one approver. If you are seeking approval from only one person, just add them as the **Approver**. (See page 12 for more information about the process, and information regarding reviewer and approver roles).

Once you have finished filling out the fields, upload your high resolution print ready file, then click on the **Start review process** button.

Thats it! Your job has started, and is now being reviewed in Pageproof.

Note: Once you have started the review, your job moves onto the production board. This is where you can track your jobs progress in the review process, see who has and hasn't reviewed the job, and see if the job is overdue or completed.

More information can be found on page 2 of this guide.
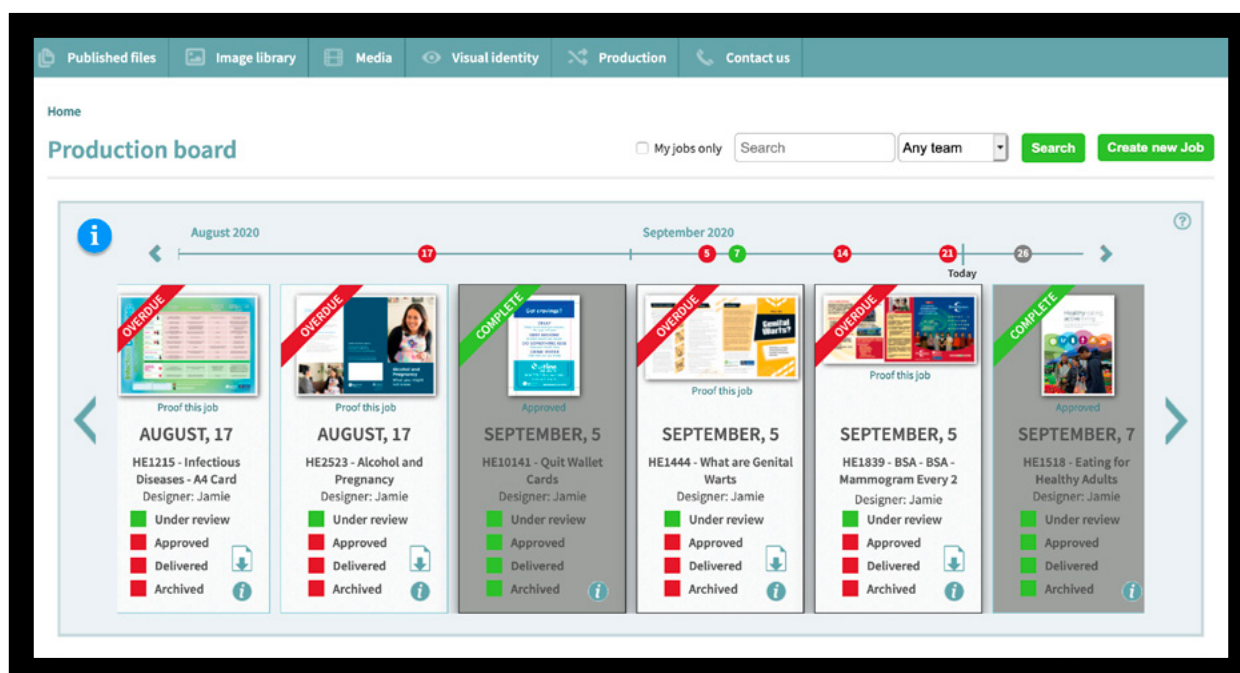
Ordering design files on Uview to make changes

Step 1

Once you have found the resource that requires changes on Uview simply add it to your 'Cart' and go to 'Checkout', you will then see the below window. From here simply tick the box "Send to your studio for changes" and fill out the necesssary fields.

1 - Design file delivery - This is where you need to tell Uview who is going to receive the design files. This person is usually the designer but could also be the content owner of the resource or someone who is managing the project.

2 - Designer, Reviewers and Approver - Here is where you would add the email addresses of who is going to design, review and approve the file online. You may not have all the information about the job at this stage, you may not even know who the designer will be, if you don't, thats fine, at least you are logging the job into the system and getting the design files retrieved.

Note: Here you can also upload the changes for the designer to take in, and leave a message that the reviewers will receive when the job is started.

When you click **'Save'** the file will move to **"Studio jobs"**. Studio jobs is a holding pen of jobs that need work done, an area where you can add more information about the job until the designer is ready to make the changes and start the review process.

Step 1 - Outcome

Receiving design files from Uview

The image below is the email that is forwarded to the person outlined to receive the design files. They can download the design files from the link provided, see the Uview information about the job and see the changes required if they were included.
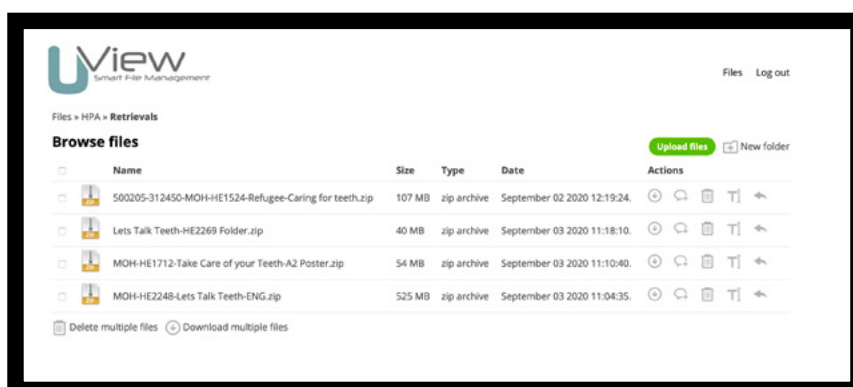
This job information, including the file of the changes, can also be viewed in studio jobs:
https://uview.co.nz/proofs/studio-jobs
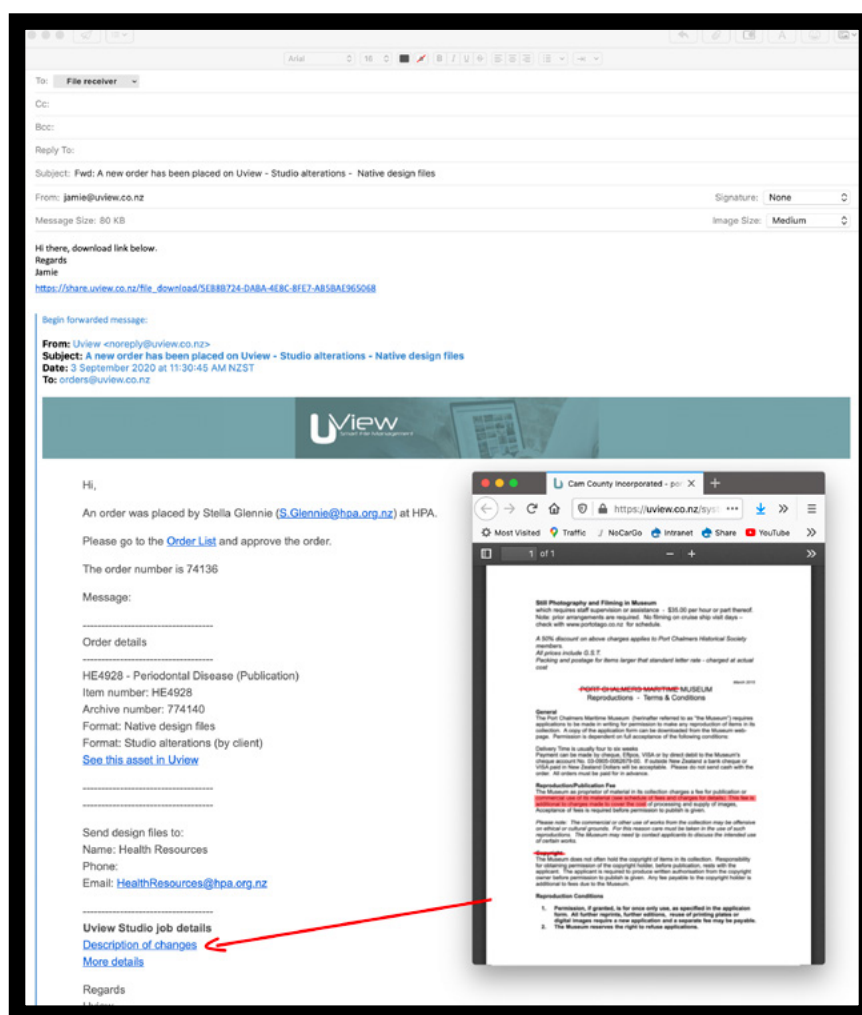
The design files requested are avialable via the download link, but are also available on your Uview SHARE site www.share.uview.co.nz
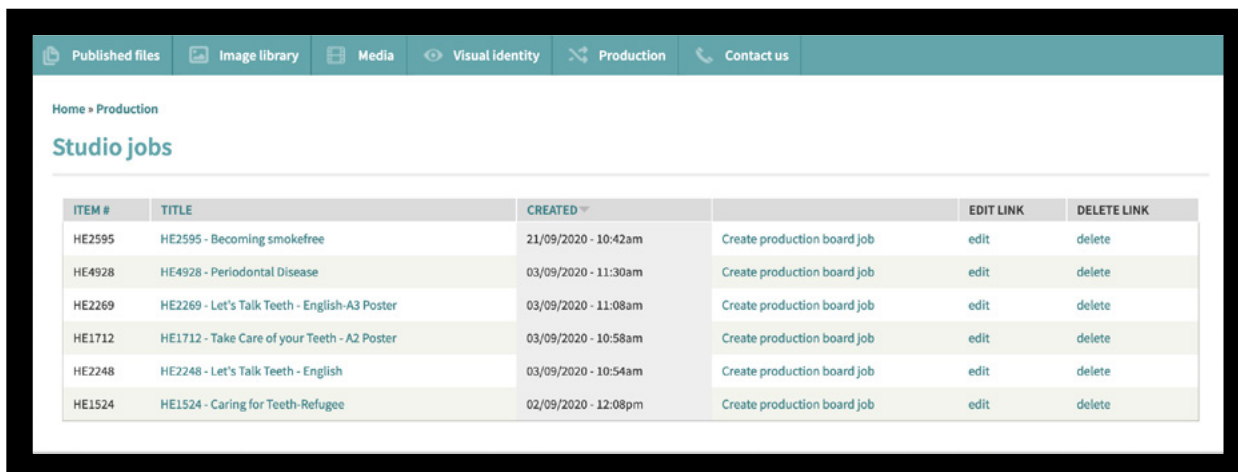
Note: The files, and download link, are only available on the SHARE site for 14 days.

Step 2

Starting the review process from Studio jobs

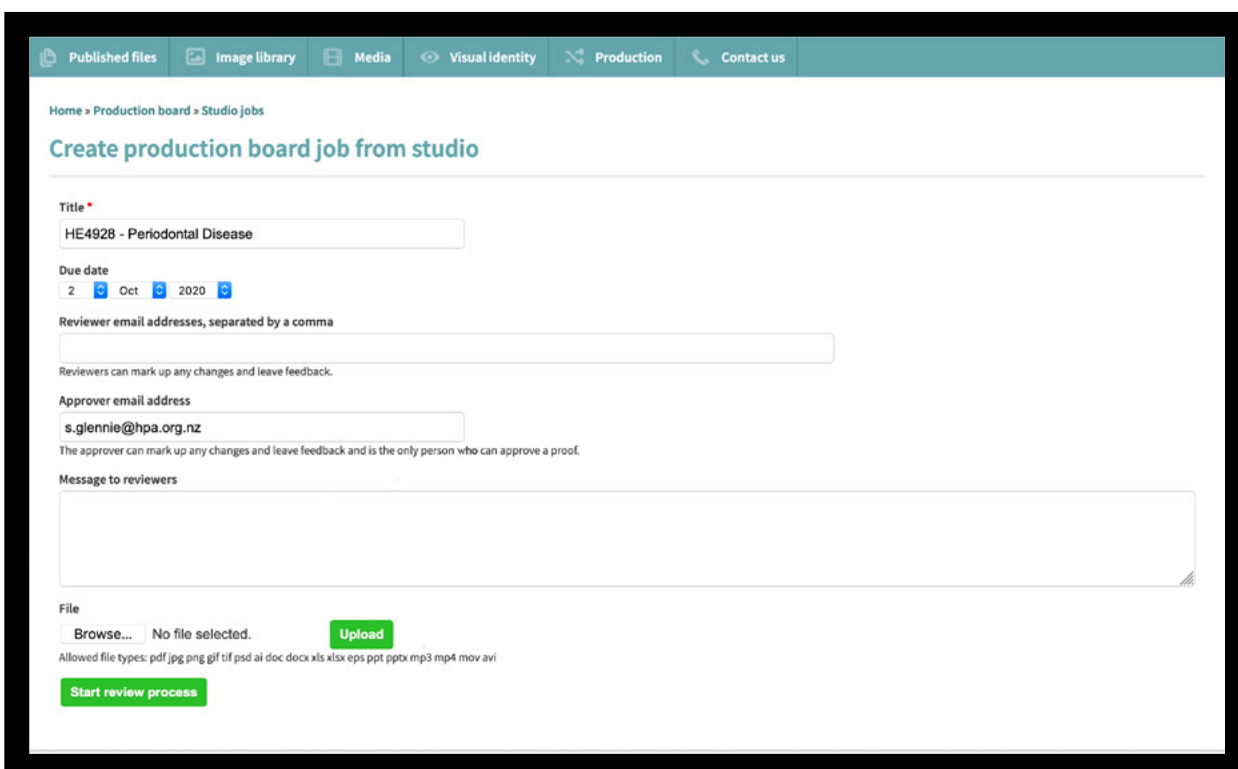Designer starts the online reviewing process by locating the job in **"Studio jobs"**.

Locate the job and click on **"Create production board job"**.

If changes were supplied the designer would upload the new updated version. If no changes were supplied the designer would upload the current version to allow the reviewers and approver to mark up the initial changes.

Note: Don't forget to leave a message for the reviewers and approver, just to remind them what they need to do.

Once you upload your file and click on 'Start the review process' your file is uploaded to Pageproof, and the job is moved from "Studio jobs" to the Production board.

Step 3

Reviewing

Once all reviewers have approved the PDF on Pageproof the approved file is delivered to the **"File delivery"** tab on the Uview Production board, (highlighted in red below).

Note: Pageproofs job is now complete, and the file has moved back to Uview.

The designer is notified and then needs to do two things:

1 – Deliver the file to the printer via the 'file delivery' tab, (step 4).

2 – Close and archive the deisgn files to Uview, (step 5).

For more information about reviewing in Pageproof, go to page 12.

Step 4

File delivery tab

When the file in Pageproof is approved it gets delivered to the 'file delivery' tab on the Production board, from here there are several options.

1 - Request printed proof - Uview can deliver to you a printed sample of your proof. If clicked fill out the delivery instructions, the person who is going to receive the proofs. (Contact us for a rates card)

2 - Withdraw approval - Clicking this link will take you to your proof in Pageproof, where you can then withdraw the approval to send the online proof back to the approver.

3 - Remove - If you want to remove the approved PDF, and upload another, click 'Remove', upload a new file, and then click "Save". This will provide you with a new download link for the file.

4 - Send the file to the printer - Here you can send the file to a printer, or to someone else. They receive a download link and the message below. The message box can be edited if you wish, but do not edit the download link. When ready, click "Send approved file".

5 - Tick and save - Use this option if you are not sending the file to anyone, the tick and save option will bypass all of the above.

Step 5

Close tab

The Close tab is pretty straight forward. Simply fill out the necessary fields, upload the web version, and the zipped design files and click **"Close this job"**. (The approved high res PDF is automatically attached).

Note: The item number field is critical, this is your item/product code for the resource. Uview will search the database to see if this job already exists on Uview, if it does, you will be prompted to tell us whether we are overwriting the existing file in your Uview published file library.

Don't worry, we still hang onto all designed versions in our 'Vault', the overwriting only applies to what is displayed on the website.

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 when the files are ready for review.

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.
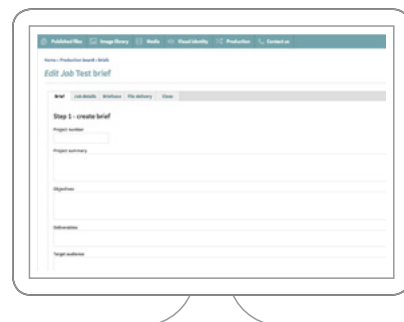
Step 1 - create a brief

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.

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 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**.

Pageproof automatically creates an account for you and keeps you logged in. If you change your browser or device you originally used to view the proof, you will be prompted to set a password.
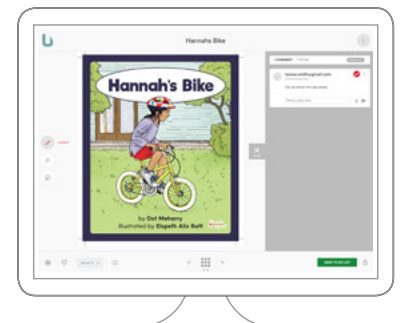
Adding a comment (Reviewers and Approver)

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 to receive 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.

Note: Mark each comment is a red to-do ✅ . Comments you don't want actioned mark 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 recieve 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
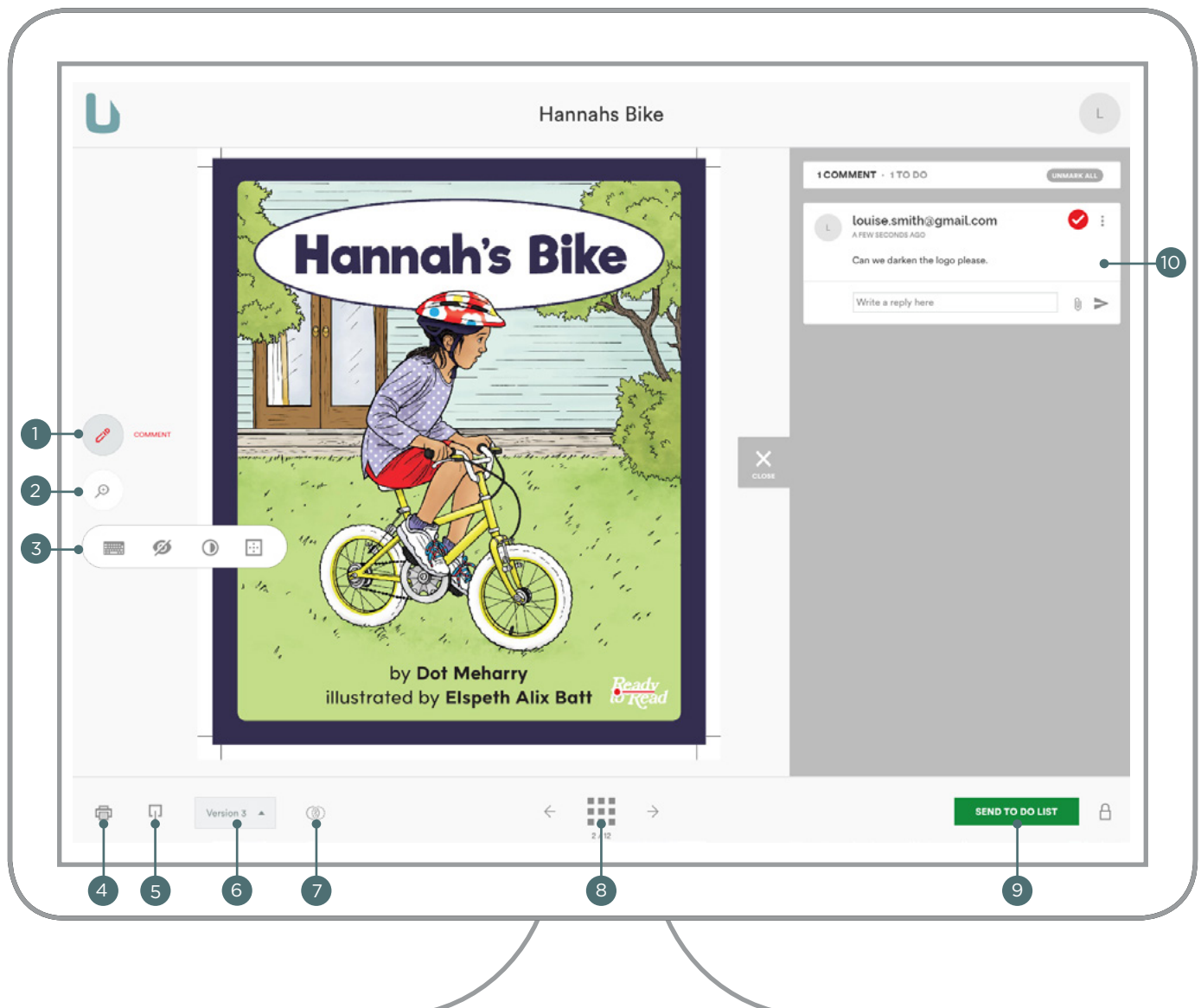
1. **Comment Tool** - to add a comment, select the red pen tool, click on the proof and write your comment. Use the @ symbol in your comment to mention another reviewer.

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

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. If you ask to be added to the proof the request will go through to the designer.

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 cog icon ⚙ at the bottom and follow the prompts to upload the new file.

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 instruiction 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.

Note: 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. Below 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 to return the printed proof to the client, a PDF of the change emailed to the client may be sufficient. Once you have approval simply 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

Note: It is **imperative** that the designer clicks the **"Unapprove printed proof"** if the printed proofs come back with changes, and the designer must remember to upload the new approved version once sign-off has been given.