Producer

Toon Boom Producer

User Guide

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About Producer

With increasing global demand for original animated content, and productions being produced from different sites worldwide with more and more work from home, there is a growing need for tools that ensure efficient production development. Studios everywhere have relied on spreadsheets and DIY solutions to help keep teams aligned, and move productions forward along timelines and within budgets.

Producer 22 provides real-time access to the progress of your animated features and series, making it easier to manage global production processes. Track tasks, assets, scenes, production progress, team management, efficiencies across departments, reporting and more. Plus, Producer seamlessly integrates with the software your team needs to get the job done including Storyboard Pro and Harmony.

Our all-in-one production management and tracking tool provides global visibility of your studio's activities, giving you access to up-to-date information and enabling you to make the best decisions at the right time.

Benefits

- Measurable increases in studio production efficiency
- On-time and on-budget feature and series delivery, enabling massive savings
- Real-time visibility of full production pipeline for quick and efficient decision making
- Reporting for all levels of studio management
- User-friendly interface makes learning easy
- Backed by the industry's leading 2D animation software company who understands the needs of global studios
- We are accessible, with support and our community being our focus — a leader in 2D animation for over 25 years
- Seamless integration with industry-leading 2D animation production (Harmony) and storyboard software (Storyboard Pro)
- Multi-production environment in one global platform
- Advanced potential for team collaboration, effective communications and task delegation

Features

- Customizable workflows, user profiles and roles
- User-friendly interface
- Dashboards and detailed reporting
- Job task reports
- Progress report
- Team productivity reports
- Access to in-app analytics and graphs
- Graphical scene status dashboard
- Customizable & Automated triggers
- Advanced filtering of projects, tasks, scenes, searches and more
- Versioning
- Potential for multi-production tracking
- Scheduling & gantt charts
- Central Hub for connectivity of every team member
- Notes and annotations
- Task, scene and asset assignment
- Asset categorization, labeling and tags for simplified search
- Thumbnails and preview videos for easy access
- Assets assembly and scene set up in Harmony
- Third-party software integration
- Batch import and export to CVS
- Advanced reporting: task reports, progress reports, team productivity, and more
- Multi-language interface (English, French, Spanish, Japanese, Standard Chinese)
- Available for deployment on premises or on the cloud

User Guide

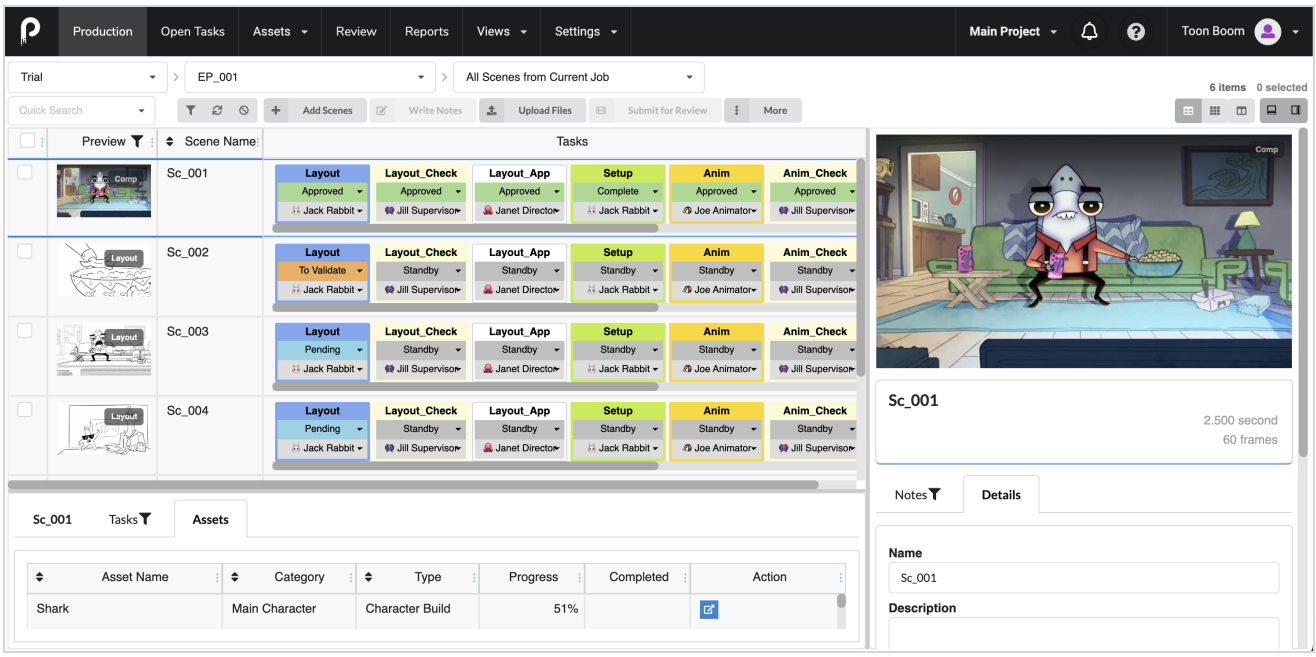
The following guide explains how to use all the core functionalities of Producer. It is addressed to all kinds of project contributors, depending on the task they wish to accomplish.

Chapter 1: Producer Interface

Overview

Producer aims to help studios manage their productions from start to end, and offers functionalities for managers, supervisors and artists alike.

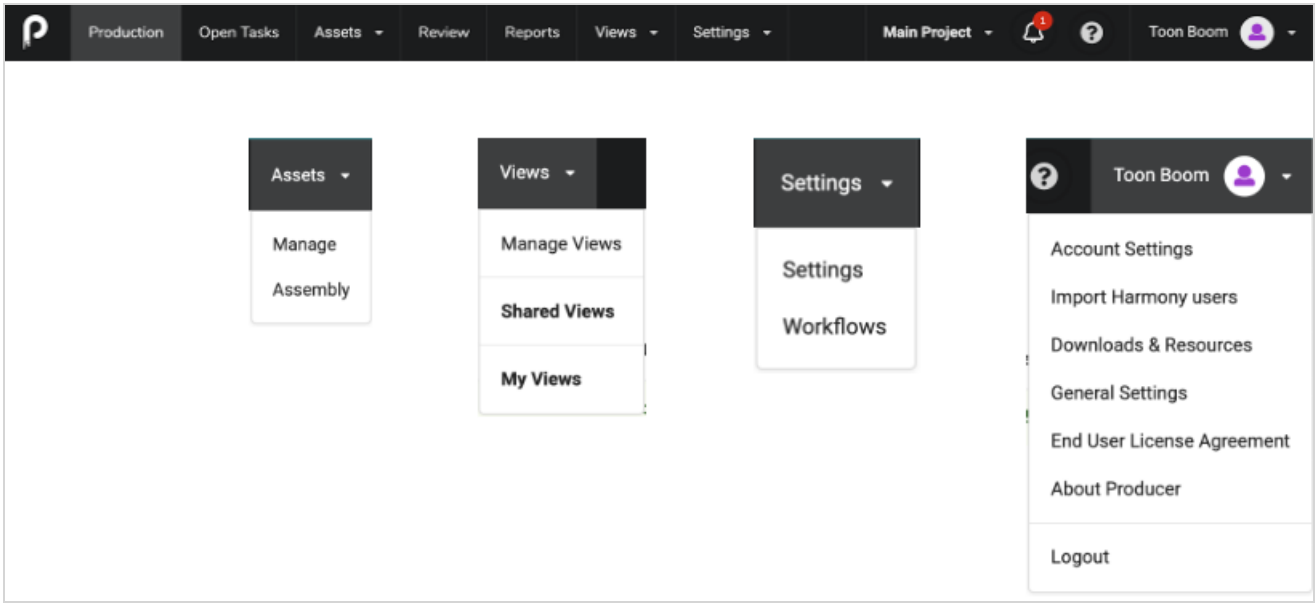
Access to Producer is protected by a login screen. After logging in, its main interface consists of a main navigation bar at the top, and a contents section underneath.



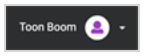
Top Level Navigation

You can navigate the main sections and features available in Producer through its top navigation bar.

> **NOTE**
>
> Users will have access to different pages and menu items based on their level of permissions — see Creating Users.



Page	Description
	Displays the list of Producer Projects. Different projects can have specific permissions, workflows, and connect to separate Harmony servers.
Production	Allows supervisors and directors to manage workloads and track the progress of episodes, scenes,and tasks.
Open Tasks	Allows a user to see the work assigned to them, update their tasks, and log work hours.
Assets > Manage	Allows supervisors and directors to track asset tasks and manage assets.
Assets > Assembly	Allows supervisors to associate assets to different environments, jobs, or scenes, and to actually assemble those assets into Harmony Server Scenes.
Review	Allows supervisors and directors to review submitted scenes and assets, approve tasks, add

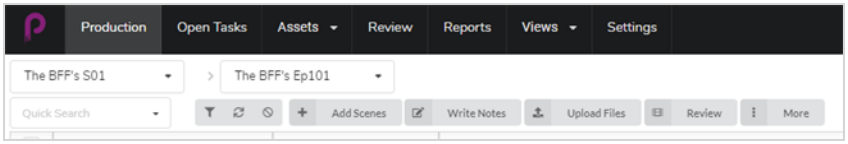
Page	Description
	notes, and send work for retake.
Reports	Allows supervisors, directors, and producers to analyze data and progress through a variety of customizable reports.
Views	Allows users to create and share custom views with custom columns.
Settings	Allows administrators to configure Producer by creating users, setting permissions and groups, and managing projects.
Settings > Workflows	Allows administrators to configure the current project's workflows.
Project Selector	Allows users to quickly switch between projects.
	User Notification Feed.
	Link to Producer Documentation
	Allows users to access standard options (Personal Settings, Logout, About, Downloads & Resources...) as well as administrator specific settings (General Settings, Importing Users from Harmony)

NOTE

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

Production Toolbar

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

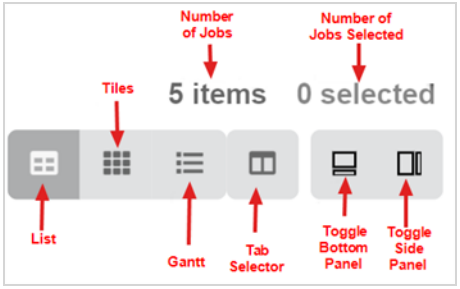


Search and Filtering Tools

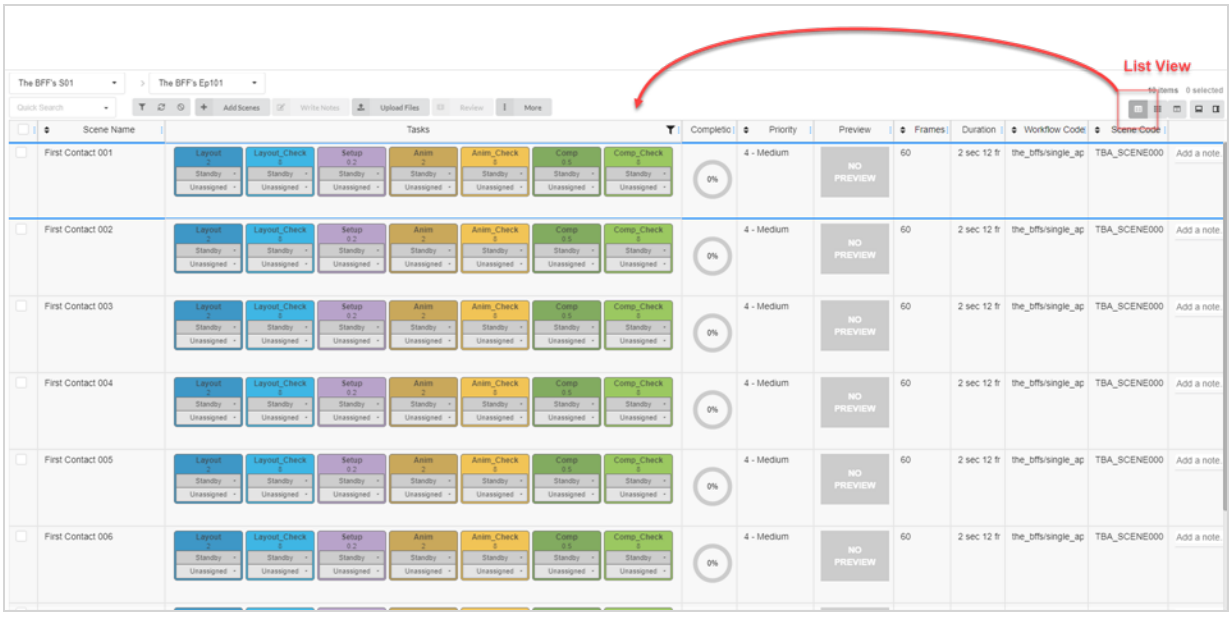
You can use the Search field and filtering tools to only display scenes and assets matching specific criteria.

View Tools

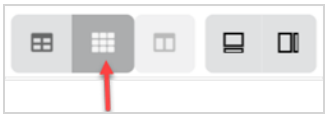
You can change the display style of the Production and Asset tables to include more or less information. For example, you can open the detail side panel or change the view style to thumbnails.

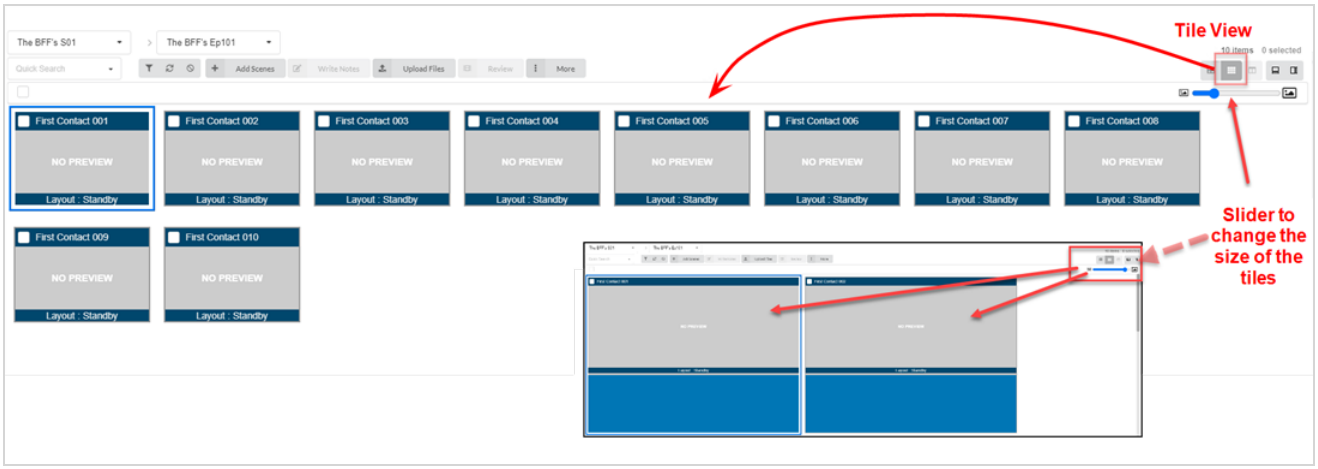


List button



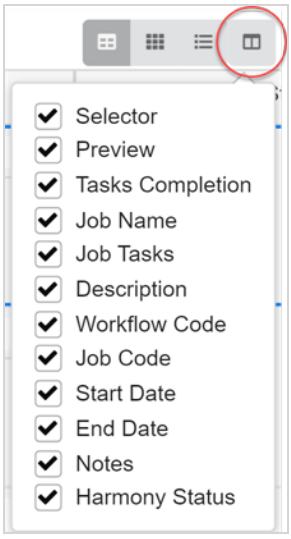
Tiles button





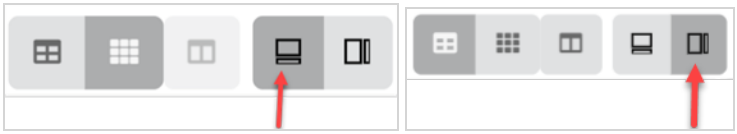
Column Selector

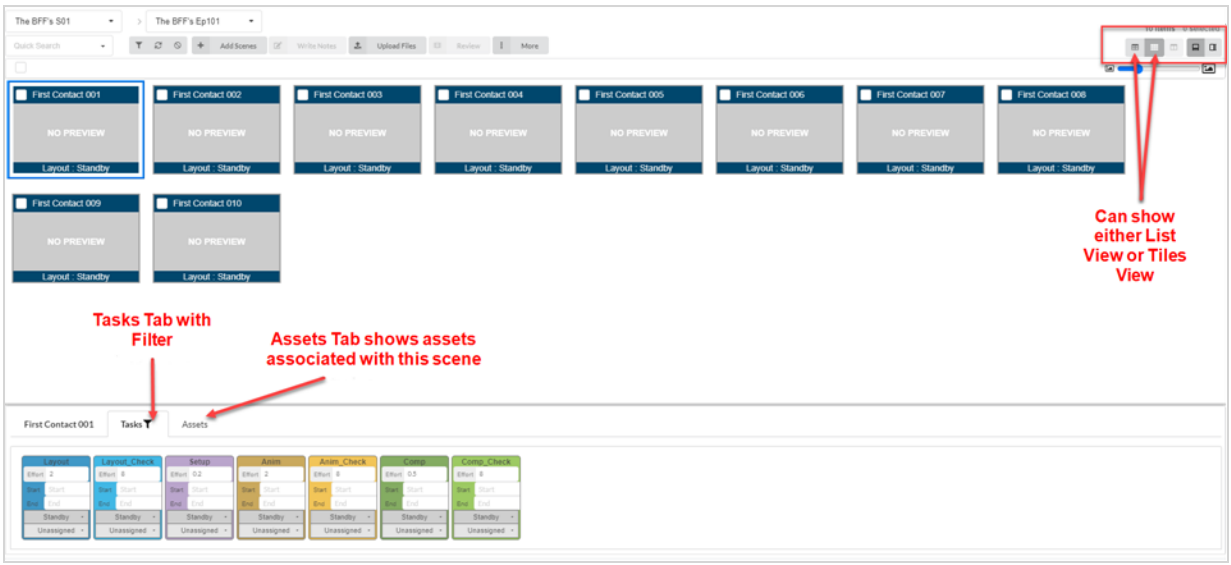
With the Column Selector you can choose how many columns are displayed in your main list. Uncheck the boxes on the ones you wish to hide.

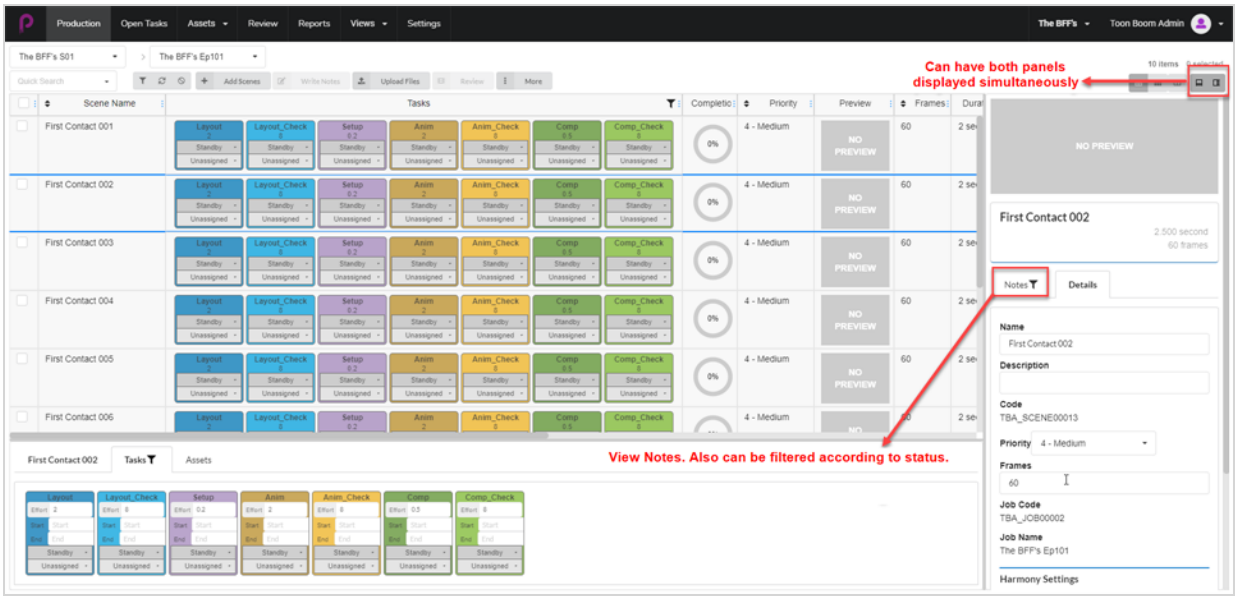


Toggle Bottom and Side Panels

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

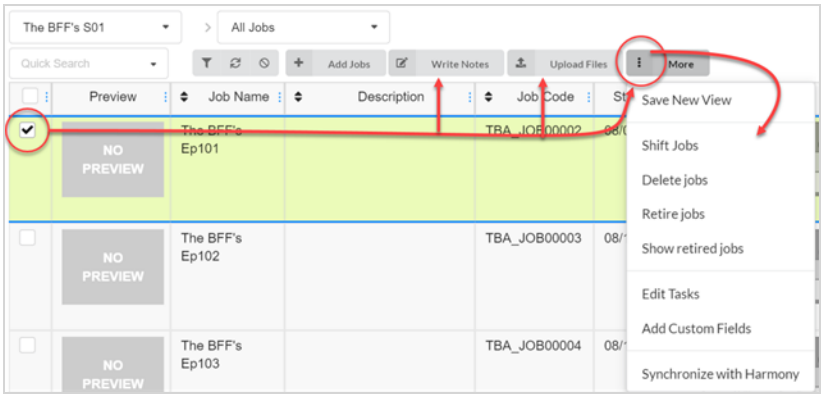






Additional Options for Selected Items

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

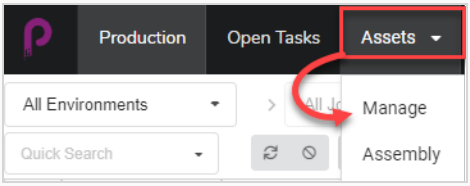


Adding and Removing Columns

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

How to add and remove columns

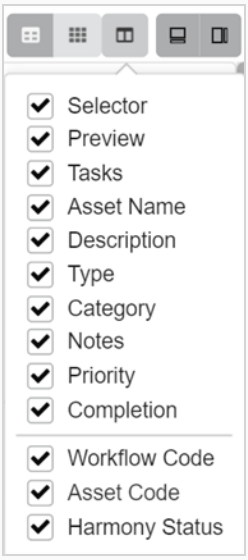
1. In the top menu, click **Production** or **Assets > Manage**.



   The assets list opens.

2. In the toolbar in the top-right corner above the assets list, click on the Manage Columns icon.

   A menu appears with all the available column options for the asset list. Columns that are currently displayed in the list are checked, and those that are hidden are unchecked.



3. Check each column box that you wish to add, and uncheck each column box that you wish to remove.

   When adding columns, the newest column added will by default appear on the right.

> **NOTE**
>
> You should always keep the Selector column enabled. This column contains a checkbox for each asset, allowing you to perform certain actions and select several assets simultaneously.

Creating Views

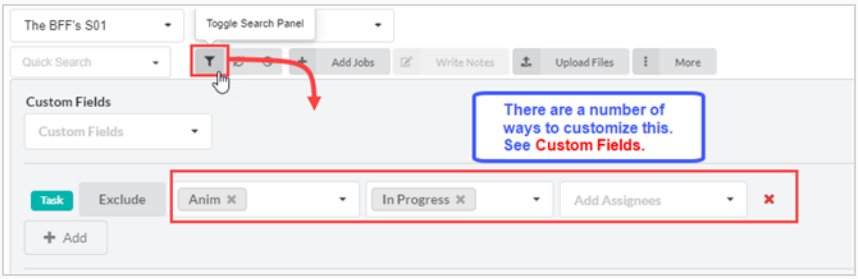
You can create custom views and share them with users to display the Production or Asset list using a specific set of columns and filtering options. You can create as many views as needed.

How to save a custom view

1. Select **Production** or **Assets > Manage**.
2. From the page toolbar, click on the Column Selector icon.
3. Check or uncheck any boxes of columns you wish to display or hide.

   > **NOTE**
   >
   > The order of the tabs will be displayed from left to right as you check the boxes in that order. You can edit this later by grabbing the name in the column header and sliding it left or right to switch the order.

   More custom fields can be entered using the Toggle Search Panel.

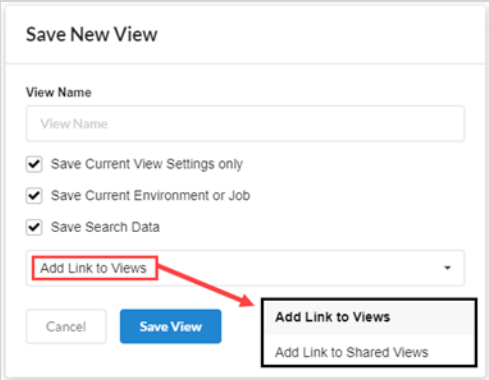
   

4. When finished, in the page toolbar, go to **More > Save New View**.

   The Save New View window opens.

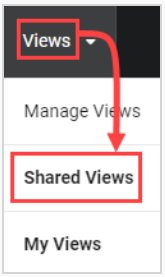
5. In the Name field, type in a name for the new view.
6. Check or uncheck the following options:
   - **Save Current View Settings Only**: saves the columns and ordering of columns in the view.
   - **Save Current Environment or Job**: save the current location of the view.
   - **Save Search Data**: saves the search data.
7. In the drop-down menu, select one of the following:

- **Add Link to Views**: adds the link to views that you can only see.
- **Add Link to Shared Views**: adds a link that everyone in the production can see and use.

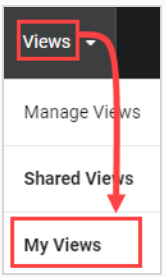


8. Click **Save View**.

   Under Shared Views in the Views tab you will see the shared views from the current production.



   Under My Views from the Views tab you will see your personal saved views from the current production.

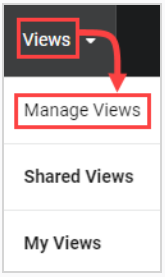


Managing Views

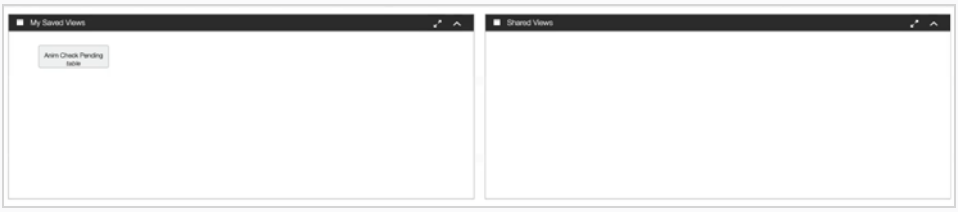
Once you have created custom views, you can manage them to remove them or manage the sharing settings.

How to manage views

1. Select **Views > Manage Views**.

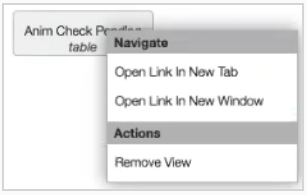


   My Saved Views and Shared Views appears.

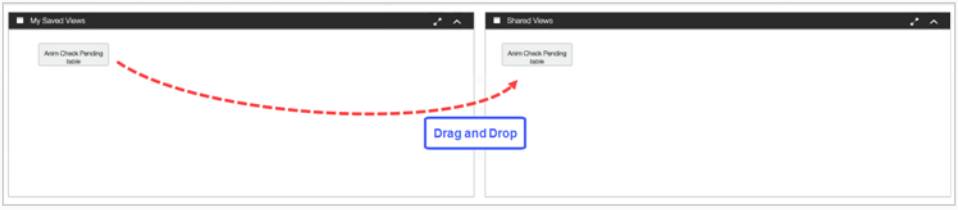


2. In the Saved Views section, right-click on a saved view.

   The option menu opens. If you click directly on a saved view, it will open immediately.



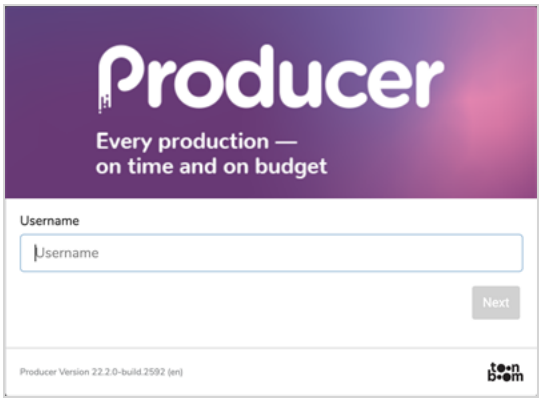
3. You can drag and drop saved views into the Shared Views section for everyone in the production to see and use.



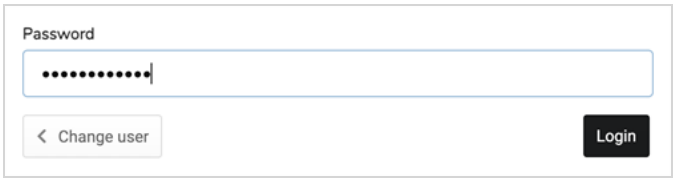
Login

Access to Producer main interface is protected by a login screen, which allows logging in directly using Producer credentials, or using Single Sign-On service.

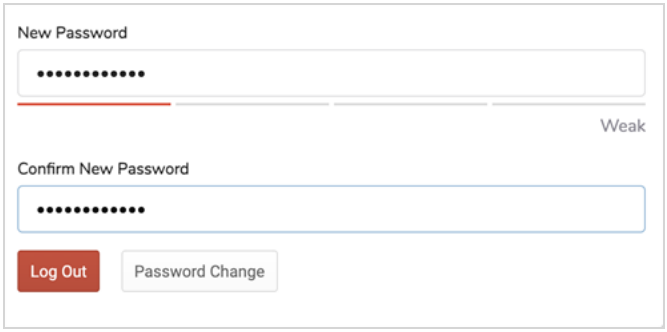
1. When entering Producer, user is asked to enter their username.



2. The next screen will either prompt the user for their password, or redirect them to a Single Sign On service. Press tab or click on the “password” field and enter your password, then hit the Login” button.



3. Upon first successful login, user will be asked to change their Producer password.



NOTE

Even when Single Sign-On is used, users will still be requested to set their Producer password.

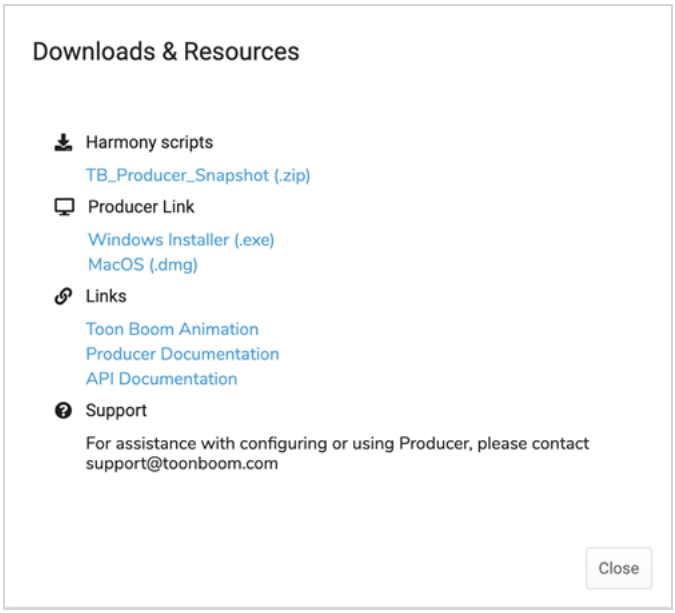
Logout

After a certain time of inactivity, users will be logged out automatically.

To logout manually, go to the main navigation Top Right Dropdown and select Logout.

User will be brought back to the login screen.

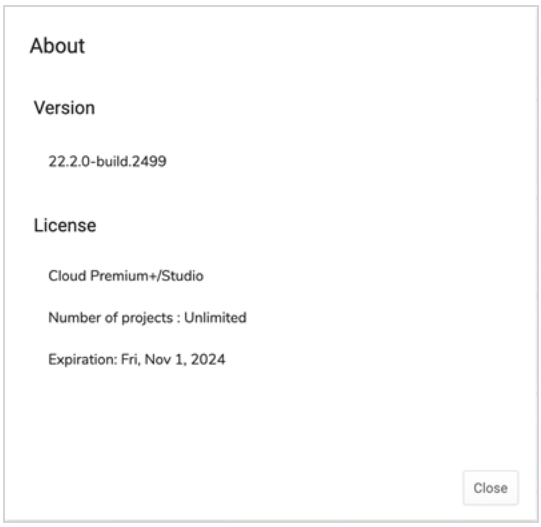
Downloads and Resources



About

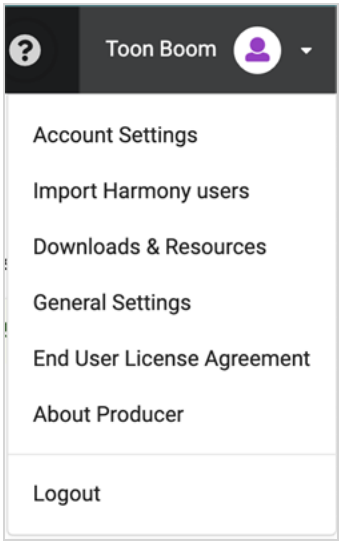
This screen displays information about Producer:

- Current Version
- License Type and expiration

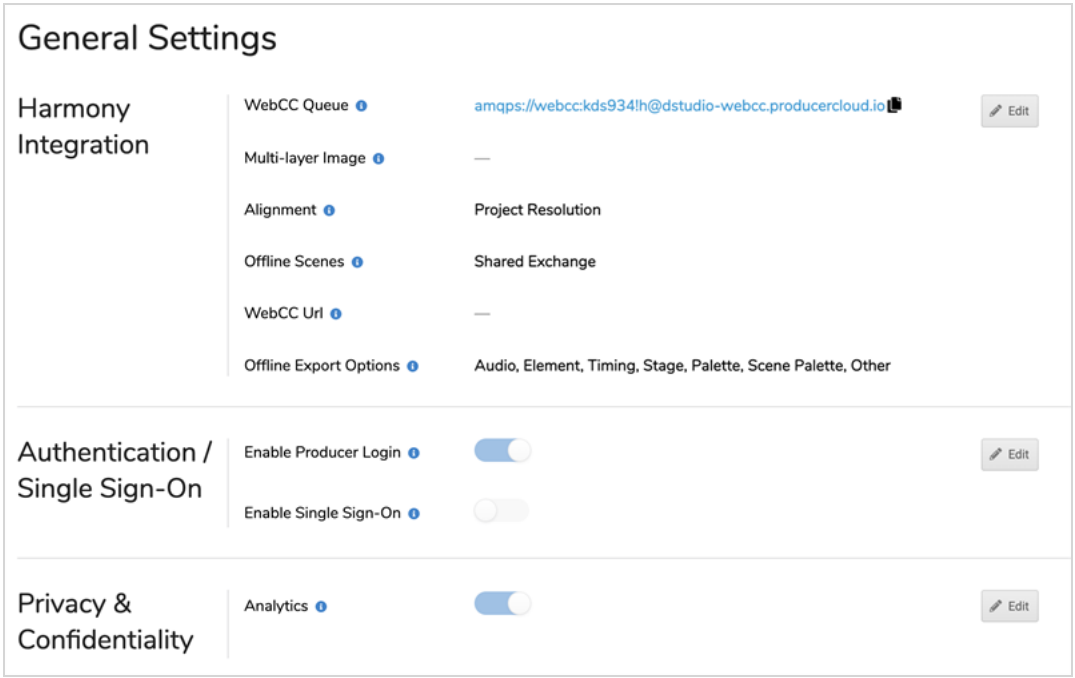


General Settings (Administrator)

Privileged users (administrators) may view and configure a certain number of site or project wide settings from the main navigation bar > Top Right dropdown > **General Settings**.



These settings are not available to normal users.



Harmony Integration

Harmony Integration allows configuring preferences when interacting with Harmony.

These settings may be configured per Producer project.

This allows Producer to interact with different Harmony servers, should the need arise.

Option	Description
WebCC Queue	This is the communication channel between Producer and Harmony, and is used as WebCC startup parameter. Refer to Chapter 9.1 - Working with Harmony Database for more information on configuring WebCC.
Multi-layer Image	This option is used when assembling multi-layer image assets (such as .psd files) in Harmony. Depending on the chosen option, Harmony will either create a single image, or multiple images based on layer names when copying or pasting the asset in Harmony scenes. Refer to Chapter 8 - Assembly for more information.
Alignment	This option is used when assembling assets in Harmony. Available options: project resolution, fit, pan. Refer to Chapter 8 - Assembly for more information.
Offline Scenes	This option is used for exporting or importing offline scenes when working remotely. It specifies how files will be synchronized between remote users and Harmony server (WebCC). Options: • **Shared Exchange**: choose this option if files are synchronized via a file sharing mechanism (like a network file system, or Cloud storage solution (Google Drive, Dropbox...). • **Direct WebCC Connection**: choose this option if a direct communication with WebCC is enabled. Refer to Chapter 9.2. Harmony Integration - Working Remotely.
WebCC Url	When Offline Scenes Exchange mode is set to Direct WebCC Connection, specify the url address of WebCC. This address must be accessible to the users working remotely, and it is highly recommended that it is used through a Virtual Private Network. If Shared Exchange option is chosen, this field may be left empty. Refer to Chapter 9.2. Harmony Integration - Working Remotely.
Offline Export Options	This specifies the default options used when exporting a scene while working remotely.

Option	Description
	These options will be used when clicking on the “Open In Harmony” button from the Production, Assets or Open Tasks pages, or when exporting from Producer Link. These options can be overridden from the More > Export Offline dialog. To export scripts or master controllers, make sure “Other” option is selected.

Authentication / Single Sign-On

Authentication settings are set globally, and are the same for all projects and users.

Three authentication modes are supported in Producer:

- Producer Built-In Login/Password
- OpenID Connect (OIDC)
- Security Assertion Markup Language (SAML)

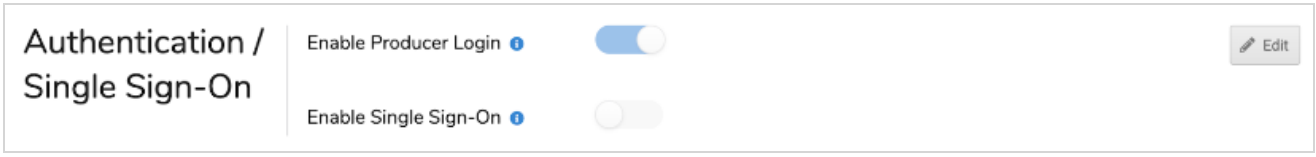
OIDC and SAML are two widely used protocols which allow authorizing users to use an application (in this case: Producer) via an external authentication and identity provider service.

NOTE

OIDC is usually much simpler and straightforward to configure. If available, we recommend using it. SAML, although also widely used, is more complex and not as well standardized. Setting up an OIDC or SAML Identity provider is not covered in this document.

Producer Built-In Login

To enable Producer Login, simply ensure that the option is selected.

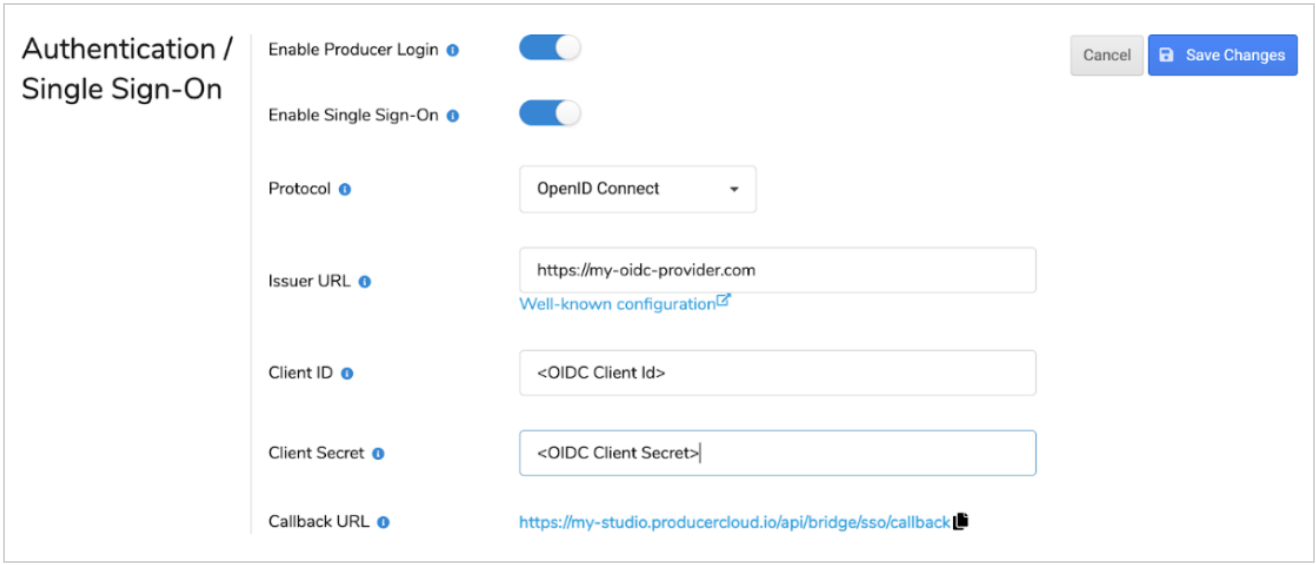


NOTE

Producer Login cannot be disabled if no Single Sign-On method is specified. Even if disabled, Producer login and password will still be used in Producer Link and Harmony Scripts.

OpenID Connect (OIDC)

Before proceeding, verify with Producer's Customer Service and your own IT department that the chosen provider is supported.

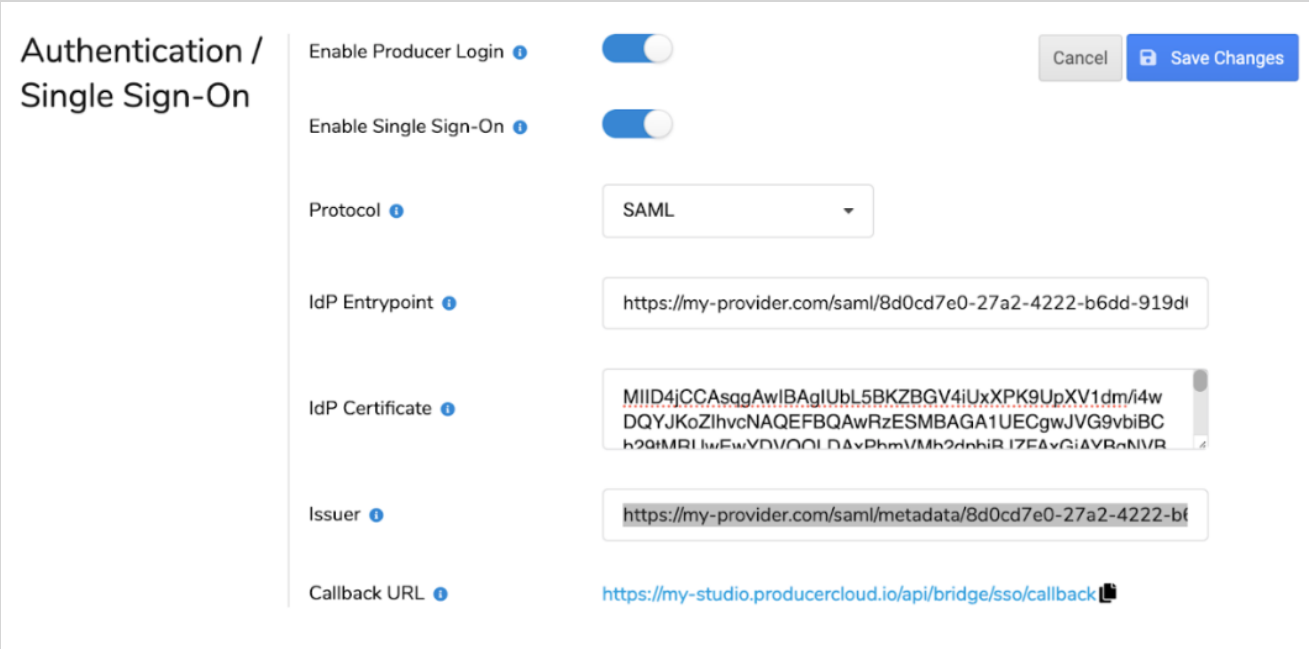


Option	Description
Protocol	Single Sign-On protocol: OIDC or SAML
Issuer URL	OIDC provider issued. This URL is the base address of the OIDC service provider (and should be retrieved from this service). If properly configured, the Well-known configuration link underneath should open a valid file containing addresses (endpoints) to perform various operations.
Client ID	OIDC provider issued. Copy this option from your OIDC provider configuration.
Client Secret	OIDC provider issued. Copy this option from your OIDC provider configuration.
Callback URL	Producer issued. Add this url to the list of authorized callback urls in your OIDC provider configuration. Once authenticated by the OIDC service, clients will be redirected to this Producer url, and authenticated in Producer.

IMPORTANT

The same email address must be set in Producer and in the OIDC service provider to allow authentication.

SAML

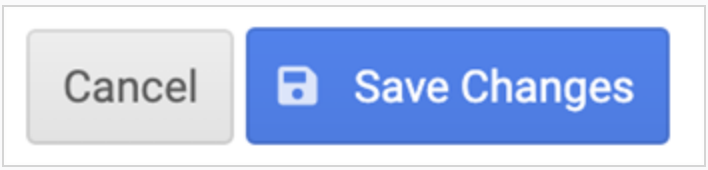


Option	Description
Protocol	Single Sign-On protocol: SAML
IdP Entrypoint	SAML provider issued. Identity Provider (IdP) entrypoint URL.
IdP Certificate	SAML provider issued. Identity Provider (IdP) base 64 encoded certificate. Must be entered on a single line.
Issuer	A unique identifier shared between Producer and SAML Identity Provider (IdP). It may be issued by IdP, or you may choose your own.
Callback URL	Producer issued. Add this url to the list of authorized callback urls in your SAML provider configuration. Once authenticated by the SAML service, users will be redirected to this Producer url, and authenticated in Producer.

How-To

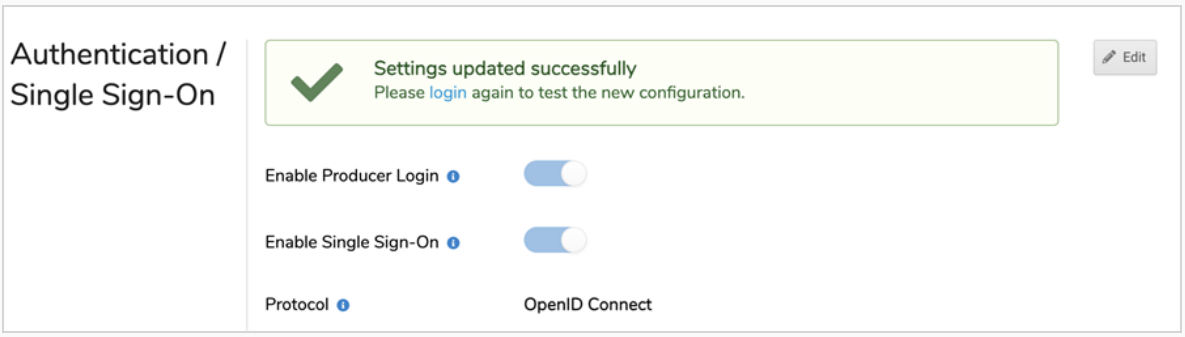
Enable OIDC in Producer

1. Click on the “Edit” button
2. Enable Single Sign-On
3. Protocol: Select OpenID Connect.
4. Fill-in OIDC provider issued settings: Issuer URL, Client ID, Client Secret
5. Copy Producer Callback URL and add it to your OIDC provider administration interface list of callback URLs
6. Click on “Save Changes” button

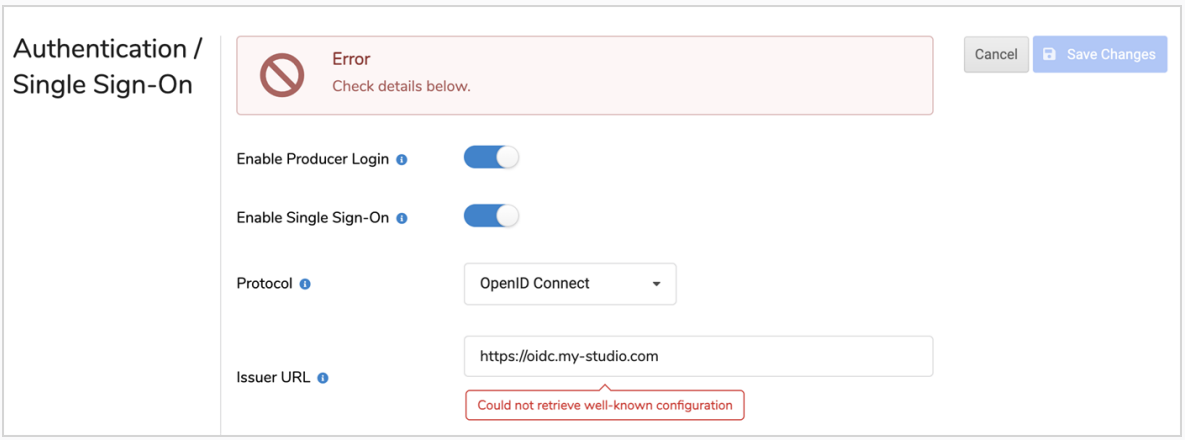


(To cancel, click “Cancel”...)

7. Click on “Save Changes” button.
8. Upon successfully saving, administrator will be asked to verify the new login settings. See Validating Single Sign-On configuration.

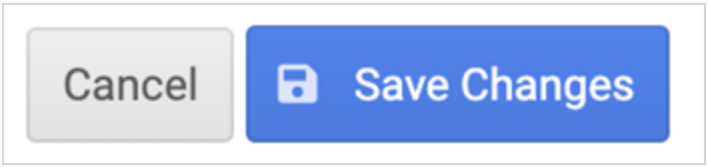


If an error is encountered, an error will be displayed instead:



Enable SAML in Producer

1. Click on the “Edit” button.
2. Enable Single Sign-On.
3. Protocol: Select SAML.
4. Fill-in SAML provider issued settings: Entrypoint, Certificate (and potentially: Issuer).
5. Copy Producer Callback URL and add it to your SAML provider administration interface list of callback URLs
6. Click on “Save Changes” button



(To cancel, click “Cancel”...)

7. Click on “Save Changes” button.
8. Upon successfully saving, user will be asked to verify the new login settings. See Validating Single Sign-On configuration.

   Any error filling in or saving settings will be displayed on screen.

Validate Single Sign-On Configuration

1. Upon clicking on the login link, the administrator will be redirected to Producer Login page. After filling-in their username, they will be prompted for their Producer password, or given the option to use Single Sign-On.

2. Click on “Single Sign-On” button. User should be redirected to the chosen Single Sign-On Service. If successful, user will be automatically logged in Producer.
3. After a successful login, the administrator may go back to the General Settings page and disable Producer Login.

> **NOTE**
> The same login options apply to all users, except administrators.

Privacy & Confidentiality

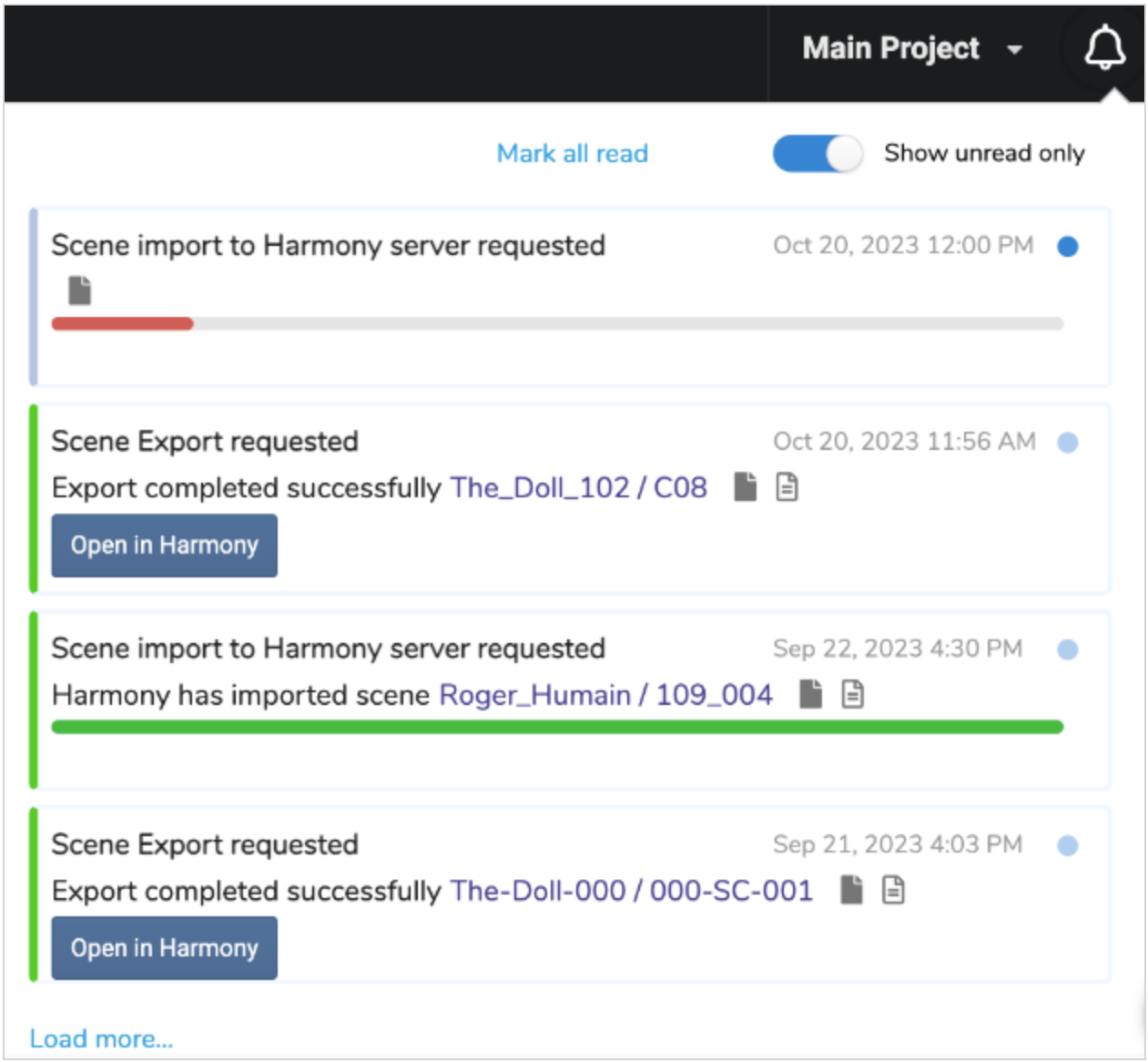
A single setting is currently available.

Option	Description
Analytics	Authorizes tracking of users actions in Producer Web Interface and Producer Link. This option is enabled by default. No personal information is recorded. Refer to Toon Boom End User License Agreement and general policies for more information.

Notification Feed

A Notification Feed is accessible from the main navigation bar and identified by a bell icon . Whenever new notification events occur, a badge will appear on the bell .

Clicking on the bell will clear that badge and display a list of notifications.



Option	Description
Show Read-Only	Allows users to filter between read and unread notifications.
Mark All Read	Marks all notifications as read. Should an entry receive an update, it will be marked as

Option	Description
	updated.
Load More	Located at the bottom left corner, allows retrieving additional (older) updates beyond the initial view.

Individual Feed Entry:

The feed will be dynamically updated with new information as it becomes available during the course of an export or import operation.

Option	Description
Read Status	Clicking on the circle icon will toggle the status between read (plain) and unread (blank/outline). When an update is received, the circle will appear half-filled.
Log	If a log is available for the operation, it will be accessible by clicking on the plain “file” icon.
File	When requesting an export, hovering this icon will display the name of the exported file.
Progress bar	The progress bar indicates, when appropriate, which stage the operation is at. For instance: • when assembling assets into scenes, how many scenes have been processed (out of the total)

Actions

The Notification Feed is currently focused on providing Harmony integration related status updates:

- Offline scene export and import
- Assembly
- Harmony users import

Harmony Scene Export Request

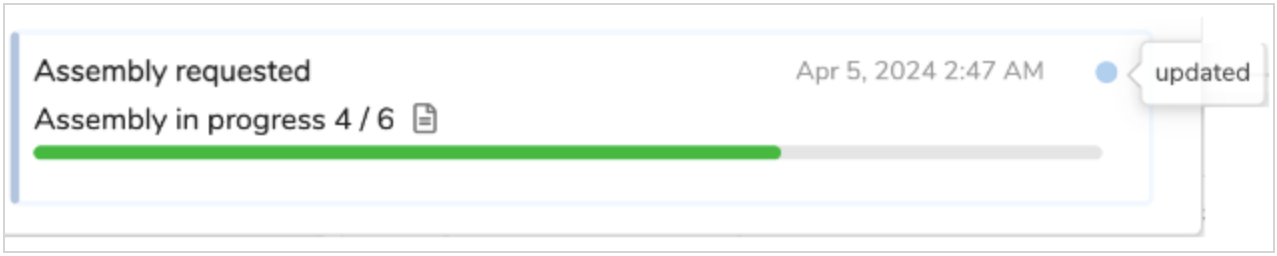
After issuing an export request, the feed will follow the progress of the request. An “Open in Harmony” button is generated once WebCC has finished processing the export (although, in some cases, the file may not be available yet to the remote user). Hovering the file icon will display the file name and clicking on the log will pop up the export log, including WebCC response.

Harmony Scene Import Request

Similarly, when an import request is made, the Notification Feed provides updates details of the import process.

Harmony Assembly

Each time an assembly request is sent, that request will be tracked and updated whenever a new update is received. The log will display a detailed status for each asset.



Chapter 2: Users and Permissions

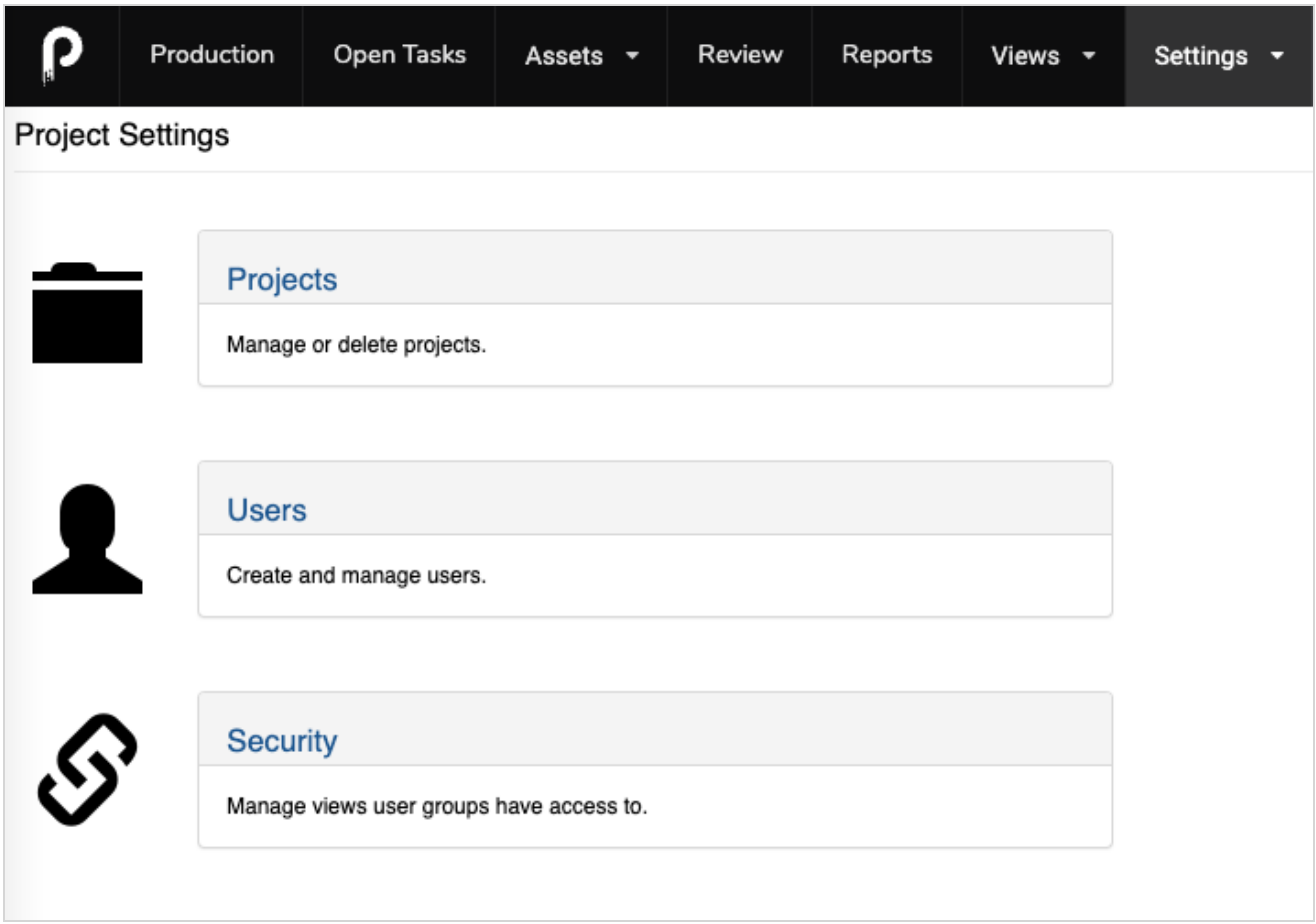
Anyone using Producer on a regular basis should have their own login credentials. This allows permissions control as well as task assignment and effective communication within Producer. Note that the permissions are handled through groups, for better efficiency. A user can be part of many groups and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

A group has two primary functions. First, it serves to assign permissions to its members, within the context of a project. Second, groups can be used to facilitate task assignments. For example, if you specify that the Animators group are the usual assignees for the task “animation” then the animation supervisor will only have to choose among users that are part of the Animators group when assigning an animation task.

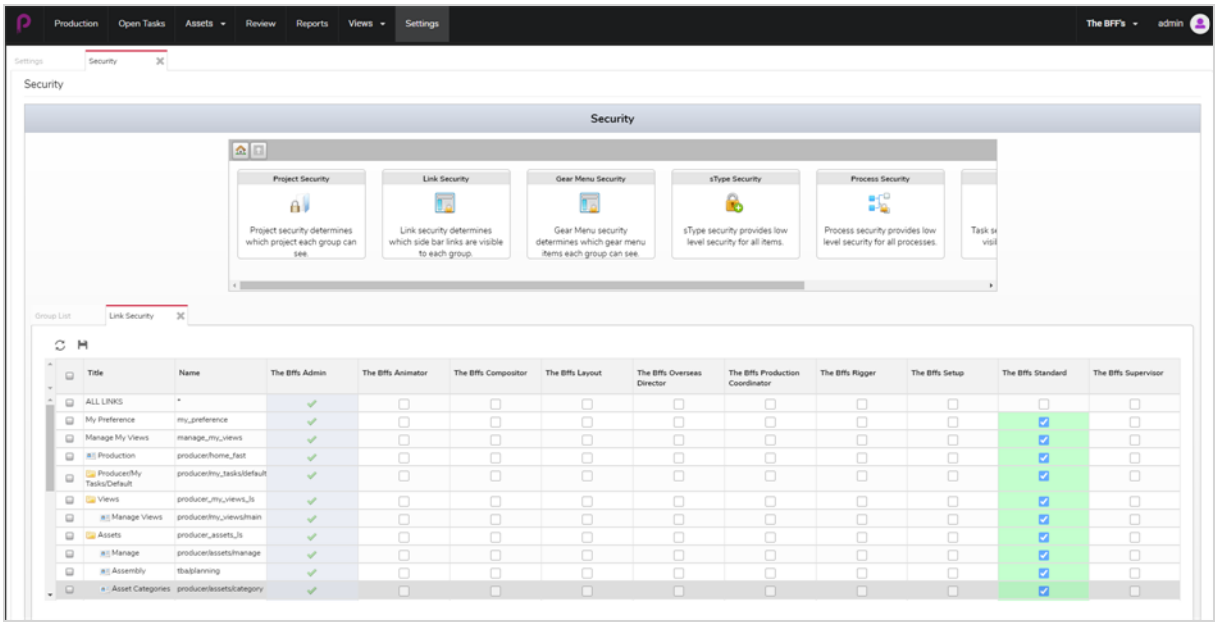
NOTE

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

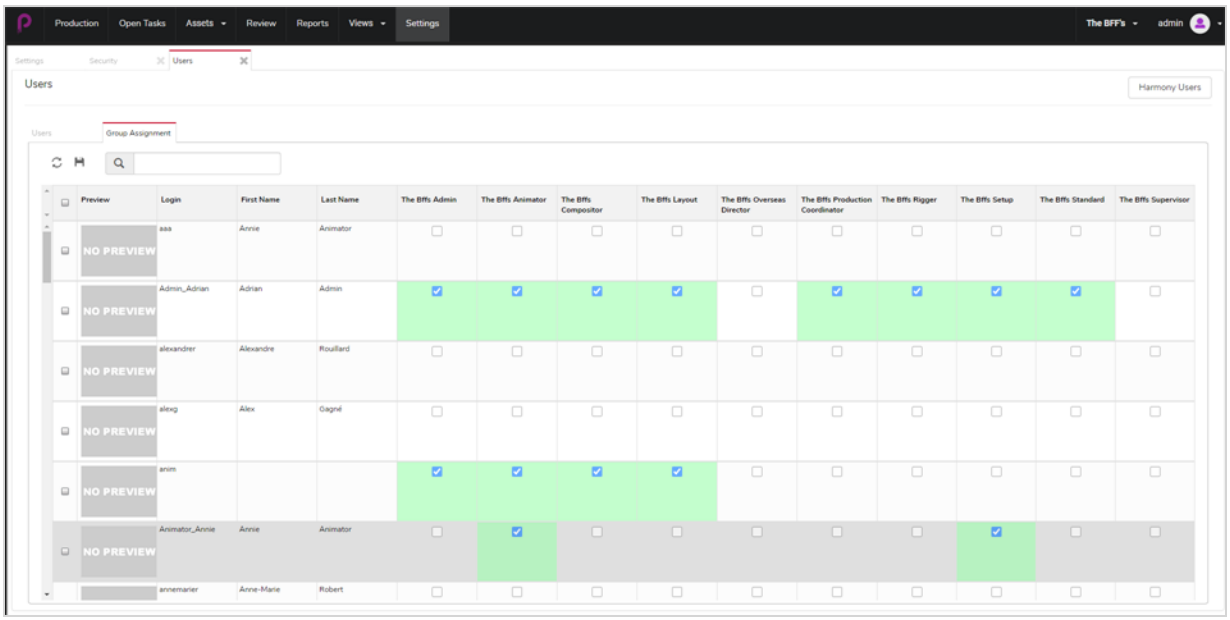
Users, groups, and permissions can be accessed via the Settings page.



The Security section allows the Admin user to set permissions for groups, page access, project access, task access, and menu item access such as creating, deleting, or archiving.



The Users section allows the Admin user to create new users and assign them to groups.

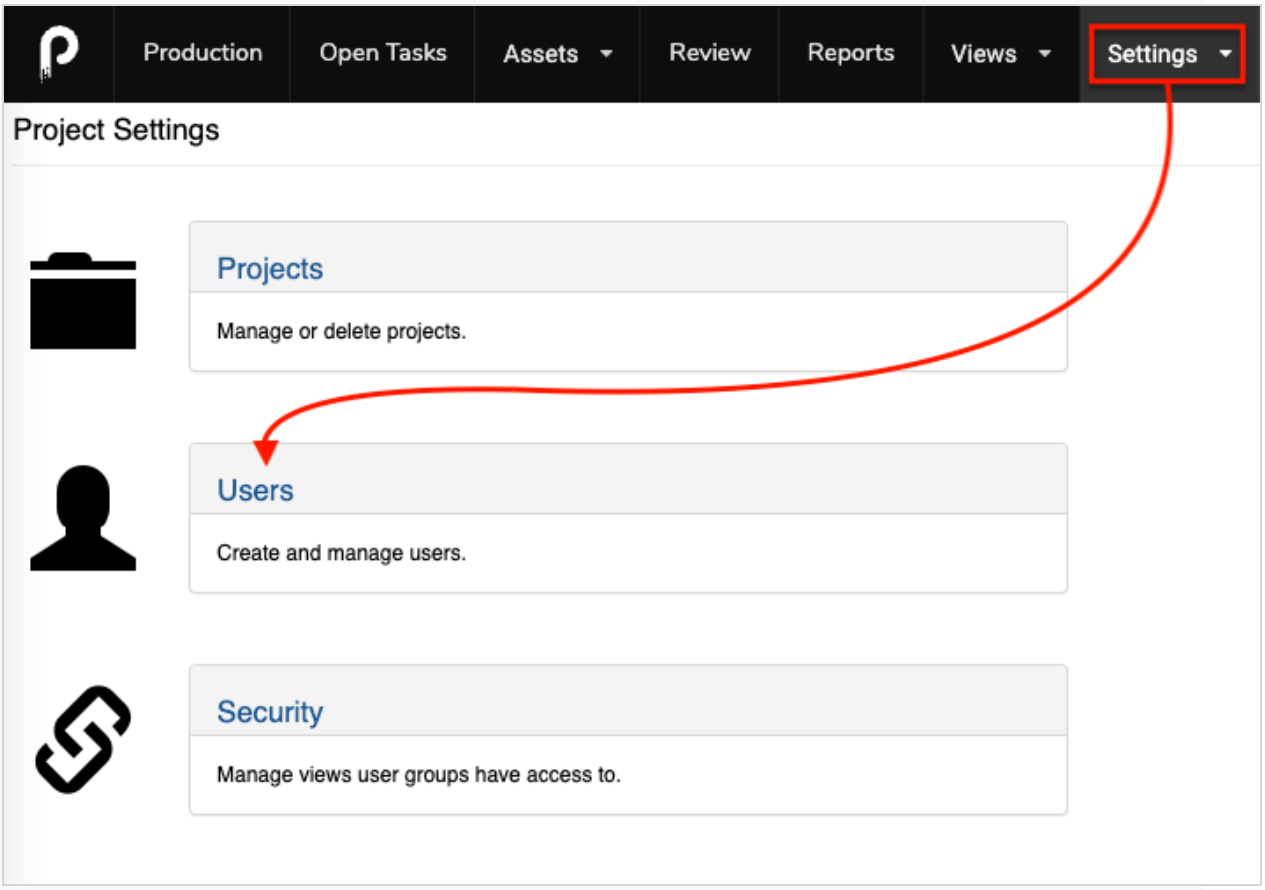


Creating Users

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

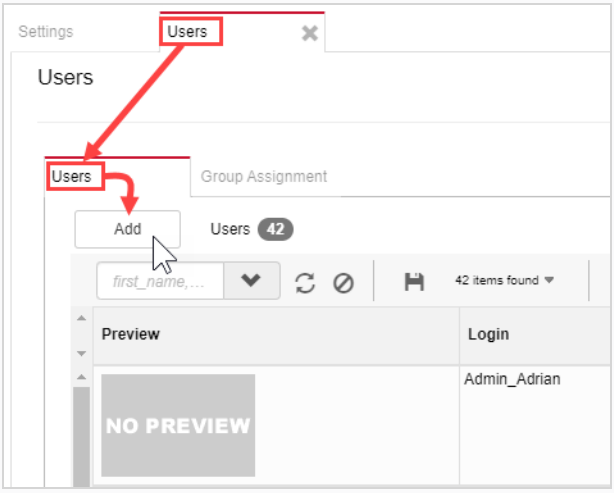
How to add a user

1. In the main menu, click on **Settings**.
2. In the Settings tab, select Users.



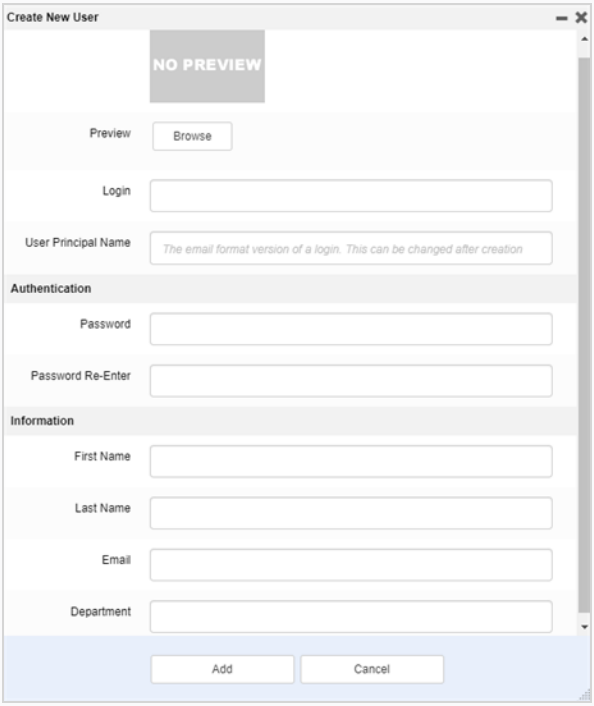
   The Users tab opens.

3. In the second User tab, click on the **Add** button.



The Create New User window opens.

4. Enter all the information for the new user.



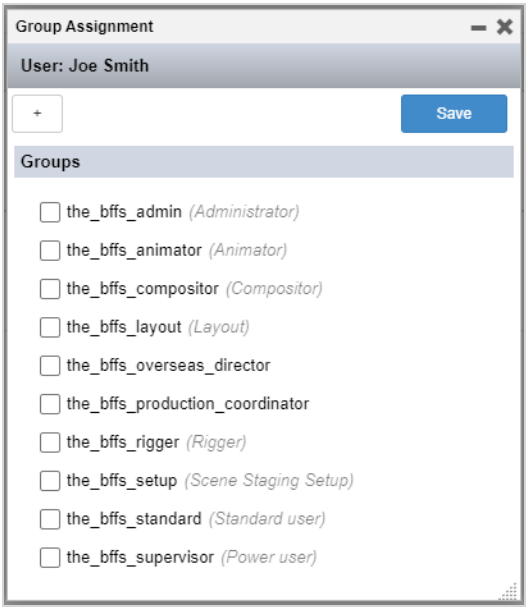
5. When finished, click the **Add** button.

Editing and Adding Users to Groups

Once a new user is created, they can have their preferences created or changed. They can be found on the same user page. Within that you can change or view preferences/groups as well as view metadata.

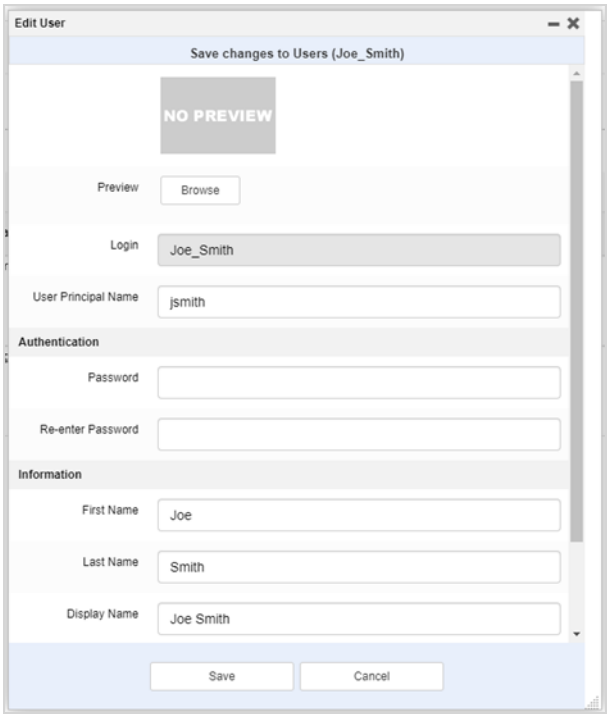
Groups

Add the user to specific groups within the production. Each group has a different set of restrictions.



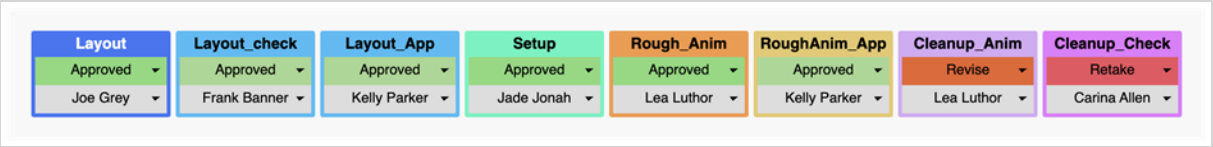
Edit User

Allows you to edit the user profile and login credentials.

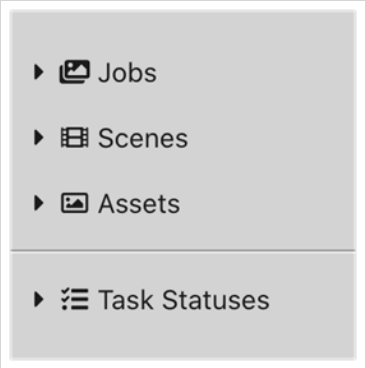

Edit User
Save changes to Users (Joe_Smith)
NO PREVIEW
Preview
Browse
Login
Joe_Smith
User Principal Name
jsmith
Authentication
Password
Re-enter Password
Information
First Name
Joe
Last Name
Smith
Display Name
Joe Smith
Save
Cancel

Chapter 3: Workflows

In Producer, production tracking is based on workflows. It is a multi-stage process usually involving several different software. While there are commonalities, most animation studios will develop their own pipelines. These custom pipelines can easily be reproduced with Producer's workflow editor. When talking about the process of a studio, the terms "workflow" and "pipeline" are often used interchangeably; however, we always use "workflow" when referring to the actual node structure in Producer. Each "node" represents a process to be completed. These processes will become individual production tasks that will be assigned to artists and supervisors.



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



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

Producer comes with some ready-made workflows, however it is recommended that you use these as templates to create your own. Workflows are specific to projects, however they can be exported and imported from one project to another.

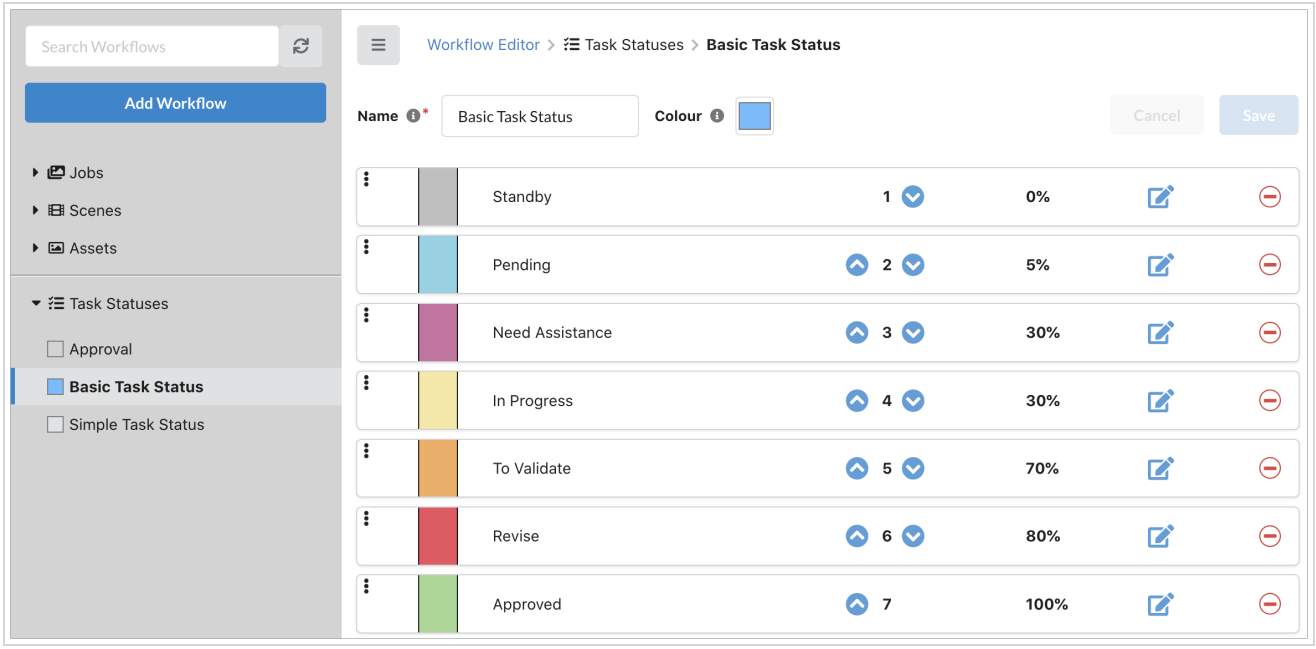
Workflows are blueprints to eventually create actual tasks that can then be assigned and tracked.

Task Status Workflows

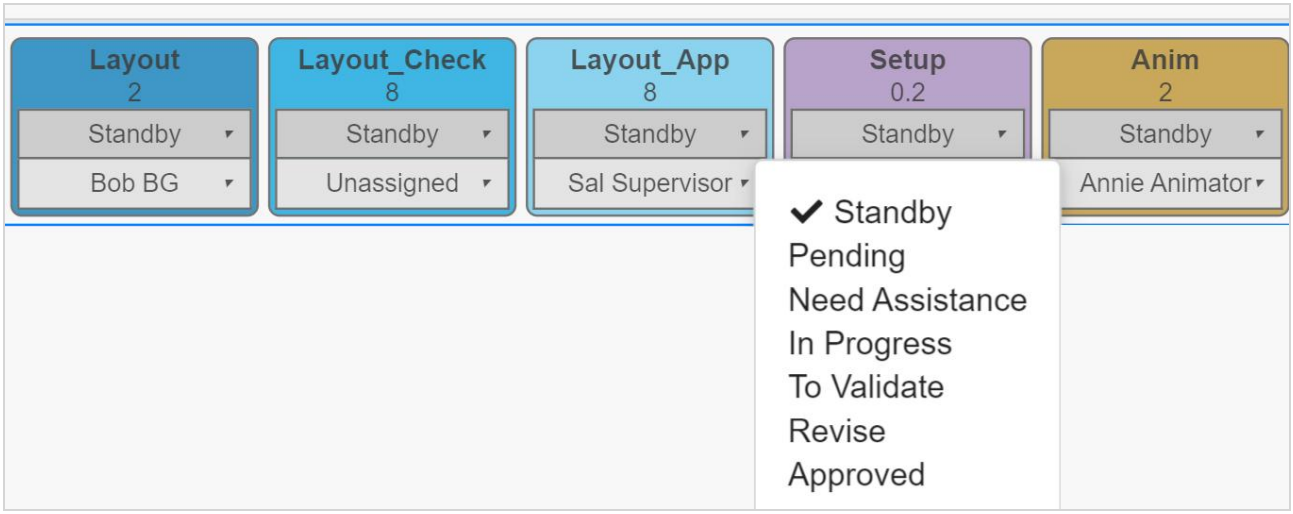
A task status workflow has a particular property. It's a workflow that can be applied to the task of another workflow. It provides different statuses for that task, letting users know the progress of that task.

> **NOTE**
>
> To find out how to link a task status workflow to a task—see Configuring Processes.

In the Basic Task Status workflow (a workflow that comes with Producer), there are seven possible options: Standby, Pending, Need Assistance, In Progress, To Validate, Revise, Approved.



In the Production or Assets > Manage tab, when a user clicks on a task status, a drop-down menu lets them choose or update the status of that task.



Included Workflows

Here is the list of workflows that are included with Producer, along with a brief description for each.

Episodes

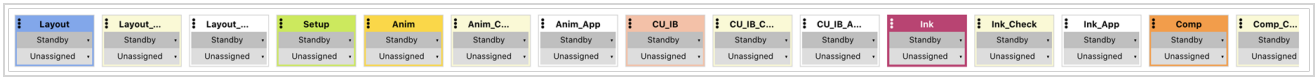
Workflow to track jobs such as episodes of a TV series.

Basic

Workflow to track scenes in a simple manner.

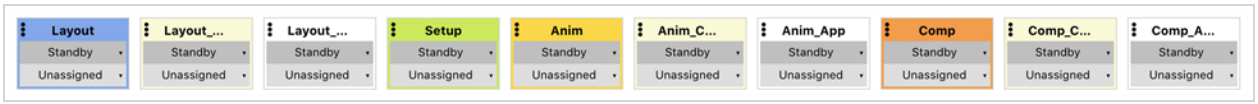
Complete

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



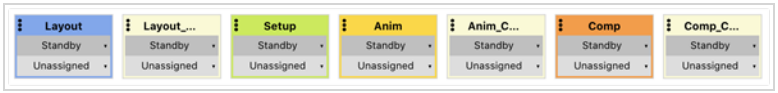
Double Approval

Workflow to track scenes, where the two approval stages are required for each necessary step in the process.



Single Approval

Workflow to track scenes, where a single approval stage is required for each step in the process.



BG

Workflow to track the creation of bitmap backgrounds.

Character

Workflow to track the building of digital puppets (also known as character rigs).

Prop

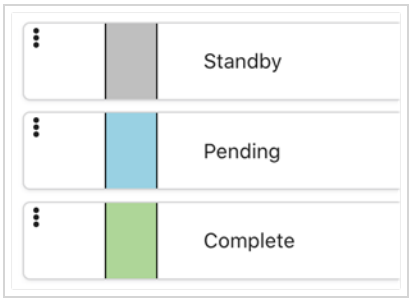
Workflow to track the building of digital props.

Basic Task Workflow

Basic Workflow providing statuses for the tasks of the other workflows.

Simple Task Workflow

Simple Workflow providing statuses for the tasks of the other workflows. It is meant to track something that is completed without any type of revision or approval (ie: task done).



Approval

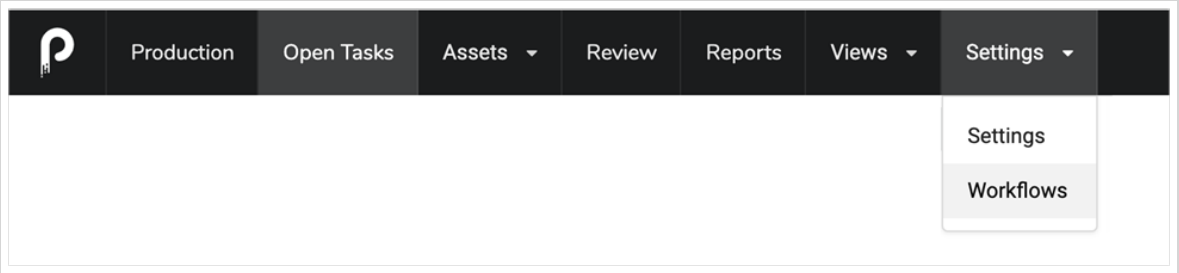
This workflow provides typical statuses for approval processes.

Duplicating Workflows

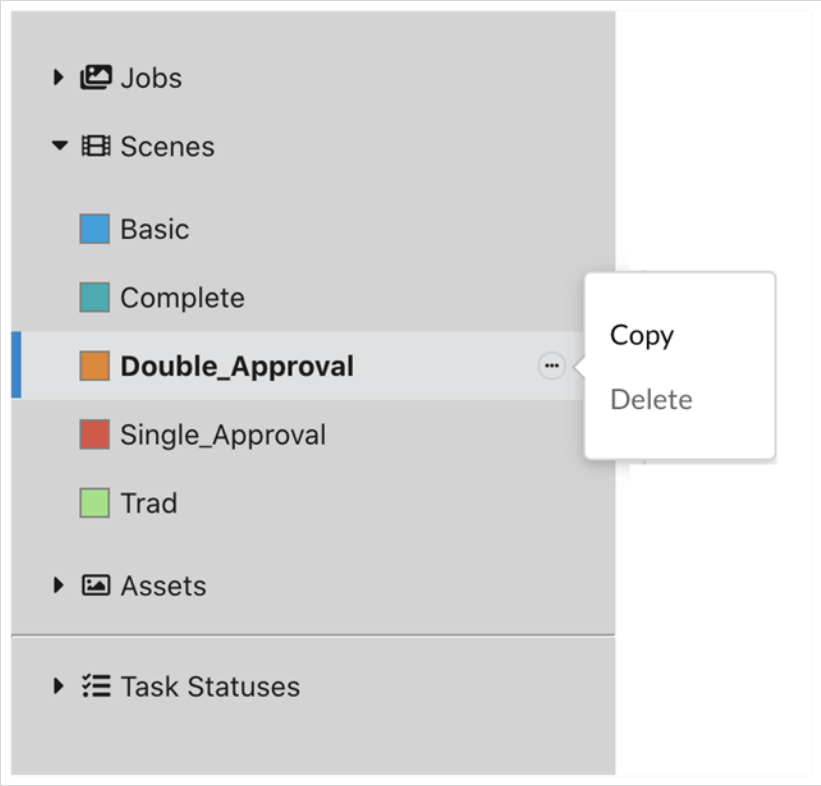
The workflows that are provided with Producer are useful templates to create your own. It is NOT recommended to use them directly as they may be updated and modified in future versions. Instead, duplicate and modify them to match your own pipeline.

How to duplicate workflows

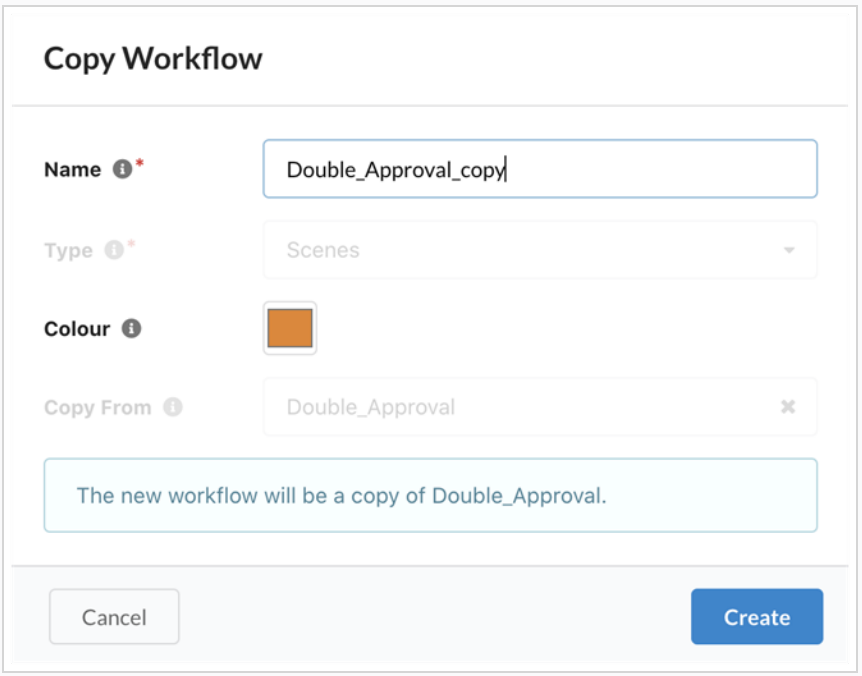
1. In the main menu, select **Settings** and then **Workflows**.



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



The Copy Workflow Details dialog box opens.



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

Creating Workflows

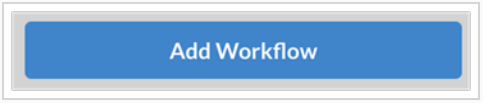
How to create a workflow

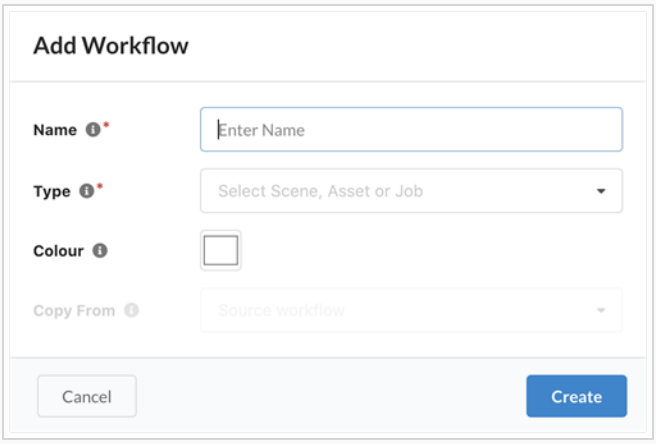
1. In the main menu, select **Settings > Workflows**

   The Workflows tab opens.

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

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





   The **Add Workflows** dialog opens.

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

NOTE

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

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

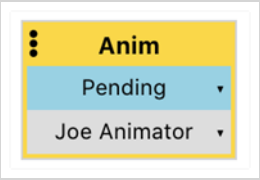
   Next, you will want to add Processes to your workflow. Check out the section on Creating Processes.

Processes

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

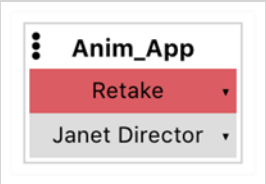
Manual

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



Approval

The Approval Process is used when work created during a manual process needs to be reviewed by a supervisor. The supervisor will then update the status to Approved or Retake. Several approval processes can follow one another.



You can attach triggers and notifications to both Manual and Approval processes so that when a specific action is performed, such as assigning a task or status change, another action can be performed, such as sending a notification to a user.

Asset Progress

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

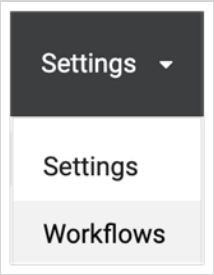
Adding Processes to Workflows

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

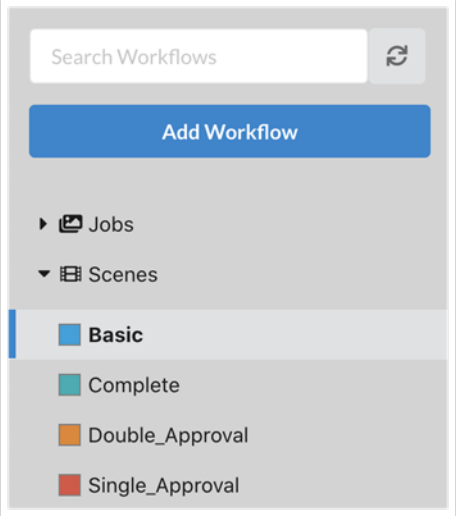
How to add processes to workflows

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

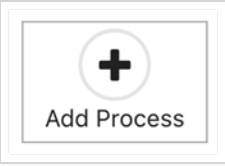
1. In the main menu, select **Settings** > **Workflows**.

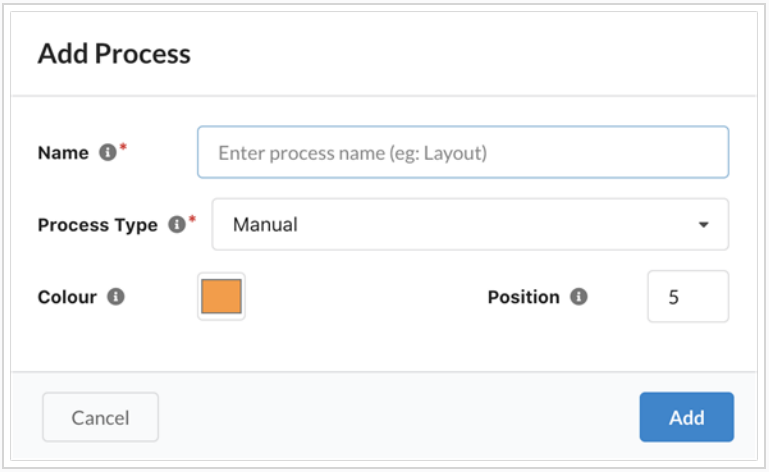


2. From the left pane, select the workflow for which you would like to add a process.



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





The Add Process dialog opens.

4. Type the name of the process.

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

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

Check Configuring Processes to learn how to further configure the process you just created.

Configuring Processes

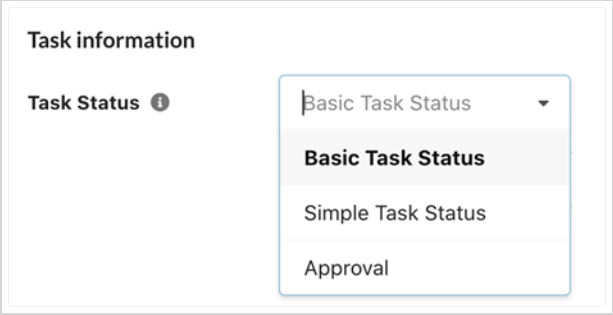
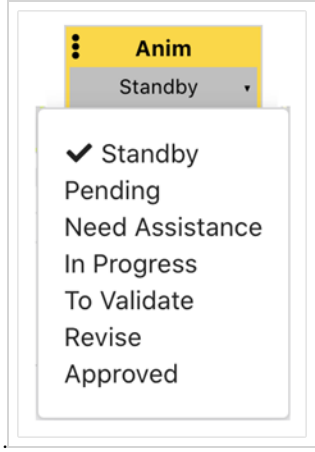
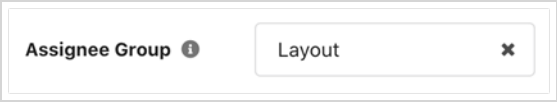
Different types of processes can be configured in different ways. However some configuration options are available for several types of processes. Here is a descriptions of all the options available:

In the Basic Information area:

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

In the Task Information area:

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

Option	Description
	 The Task Status options of that workflow become instantly available as a drop-down menu in the sample task above. 
Assignee Group	Set an **Assignee Group** to restrict the assignment of these tasks to members of a specific group. This is especially useful if there are many users. 
Completion	Set a number from 0 to 100 to represent the overall progress of the item (job, scene or asset) once this manual task is completed. For example, if a scene is considered 20% completed when the layout is finished, set the “Completion” value of the manual process “Layout” to 20.
Duration	Use this field to specify how many days are needed to complete all the tasks of this process for the whole job. This will set the default value to calculate the due date for the production schedule that can be seen in the GANTT chart. Note that the due date can later be modified per task.
Effort	Use this field to specify how many hours a task should typically take. This can be used to measure performance and track costs when compared to worked hours. Note that the effort

Option	Description
	can later be adjusted for specific tasks.
Take/Retake	This field will determine whether to keep a track of “Takes" or "Retakes”. For example, a task process will typically track a Take number whereas an approval process will typically track a Retake number. You can also set the initial Take or Retake value. To determine when the Take or Retake number will increment, you will set behaviours. To view the current Take or Retake number in the Production page, you will have to edit the column options.

The Asset Progress have different configuration options:

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

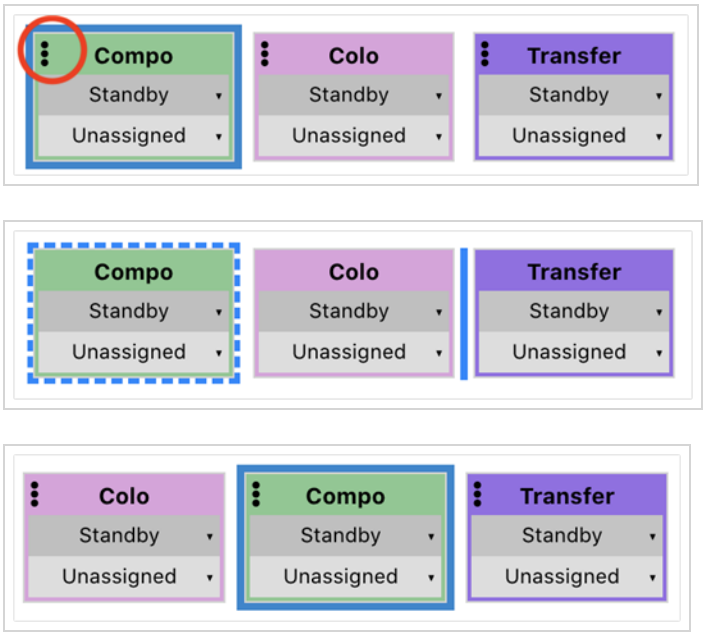
Moving Processes

There are two ways to change the order of processes.

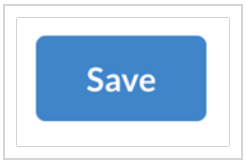
You can do it by changing the value of position:

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

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



Both methods require that you save the changes.



NOTE

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

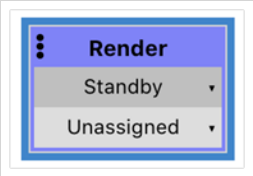
Deleting Processes

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

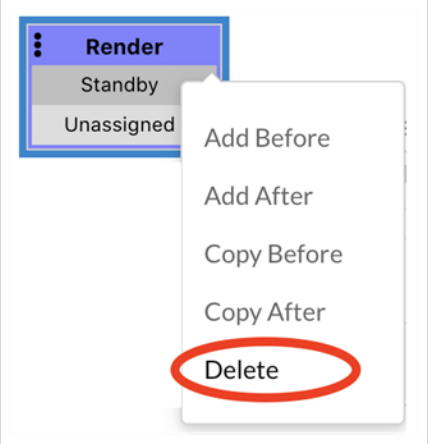
How to delete processes

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

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



3. Select "Delete".



4. Press the blue "Save" button to confirm.

NOTE

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

Behaviours

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

Typical behaviours for a manual process would look like this:

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

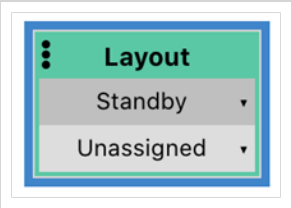
Before creating a behaviour, you must first create a custom workflow—see Creating Workflows or Duplicating Workflows. It is interesting to note that duplicating a workflow will also duplicate its behaviours.

NOTE

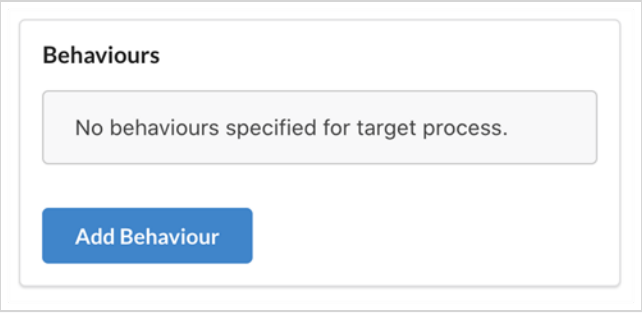
Behaviours used to be called Triggers in older versions of Producer.

How to create a behaviour

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

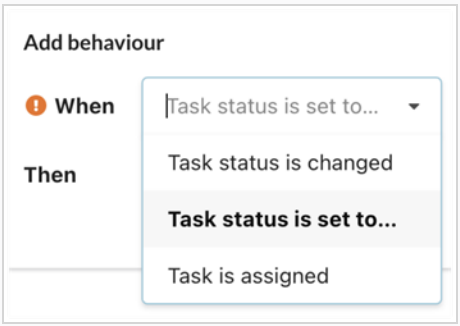


2. In the panel below, click on “Add Behaviour”.

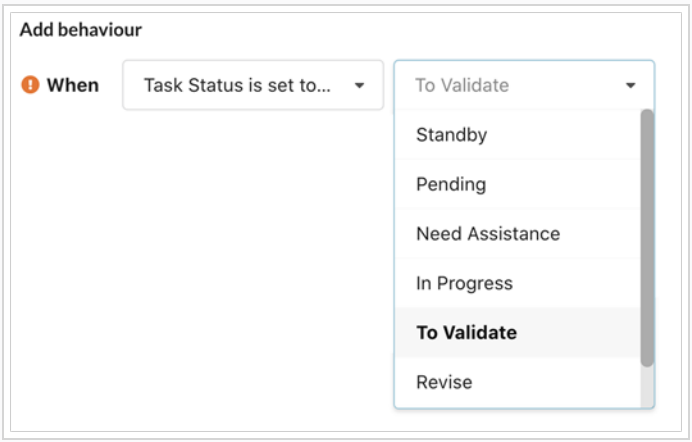


3. Set up a condition by using the drop-down after “When”. Three possible actions are listed:
    a. Task Status is changed...
    b. Task Status is set to...

c. Task is assigned...



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

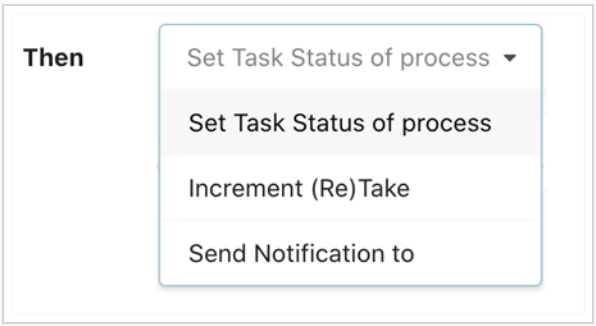


5. You can now set the Action resulting from the condition being met. Next to “Then”, use the drop down to pick one of 3 possible actions:

   a. Set Task Status of Process

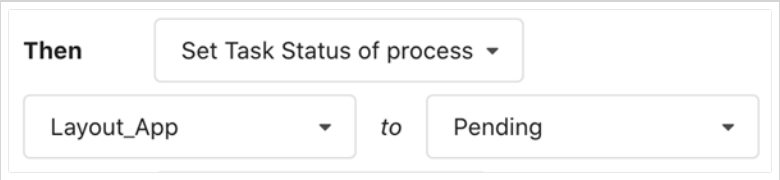
   b. Increment (Re)Take

   c. Send Notification to



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

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

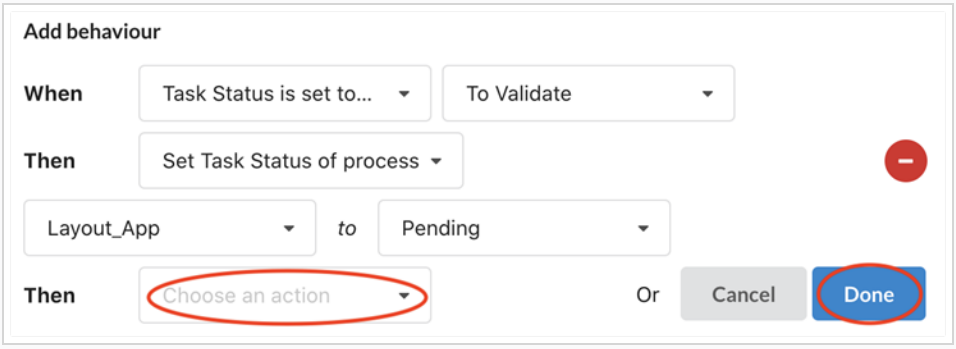


> **NOTE**
>
> When selecting a process, you can either pick a specific process by name or you can use a relative process such as *Next* or *Previous* process. While relative processes can be useful in that they are easier to copy and reuse later with minimal maintenance, it is important to remember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

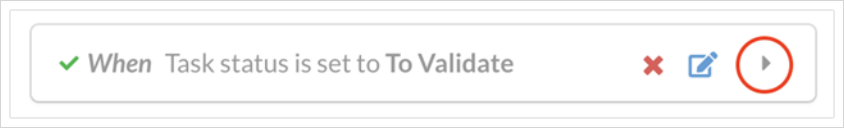
    b. In the case of “Increment (Re)Take”, you nneed to select which process will increment the value of “Take” or “Retake”, depending on which value this process is tracking.

    c. In the case of “Send Notification to”, you can select one or multiple contacts to be notified. They can be users or groups of users. The notification can also be sent to the task assignee directly.

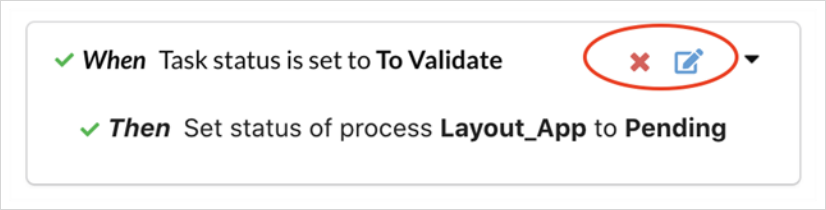
7. Now that a first action has been specified, you can either confirm the behaviour with the “Done” button or specify more actions to be executed when the above condition is met. To do so, simply use the dropdown next to the last “Then” and redo step 5 and 6.



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



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



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

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

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

Common behaviours for manual processes:

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

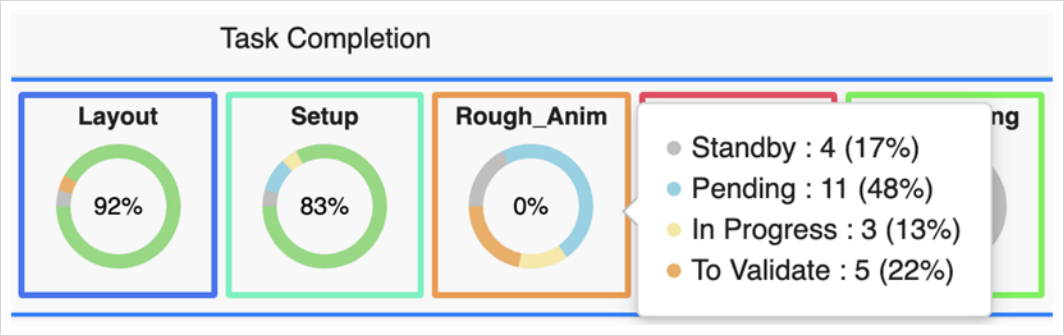
Common behaviours for approval processes:

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

Adding Overview Processes to Job Workflows

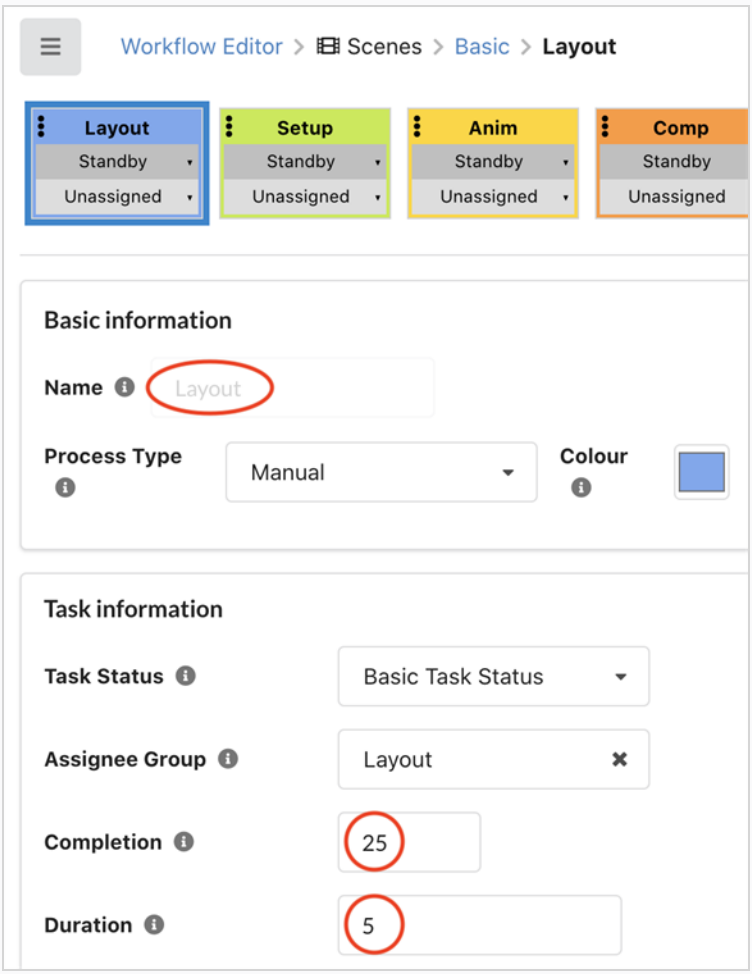
While a Job workflow is keeping track of tasks that are relevant to the whole job (such as writing the script or generating the storyboard), it is also possible to be informed of the cumulative statuses of scene tasks contained within a job by adding “Overview” processes. An overview process will look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

Task Completion Overview

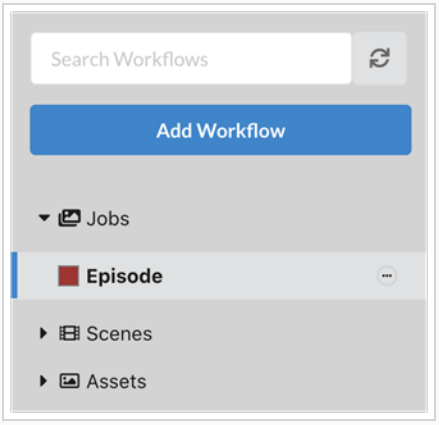


How to add an Overview Process to a Job workflow

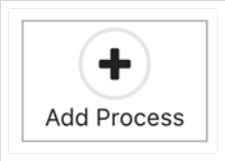
1. In the Workflow Editor, open up the Scene Workflows containing the Processes you are interested in tracking. Identify these processes, noting the exact spelling of their names, the values of completion and duration. The colour can also be useful.



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

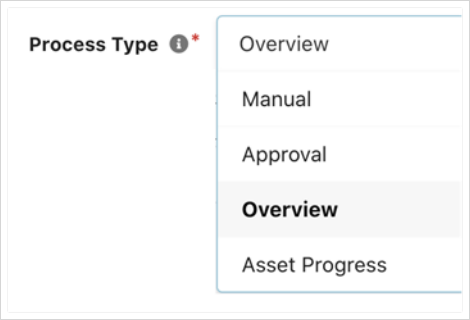


3. Click on the Add Process button



(The Add Process dialog appears)

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



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

NOTE

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

About Completion:

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

About Duration:

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

Chapter 4: Production

The Producer structure is divided as follows:

- Project
    - Environments
        - Jobs
            - Scenes

Environments are a collection of jobs. Typically, environments are used to separate the seasons of an animated series, or to separate animation series themselves.

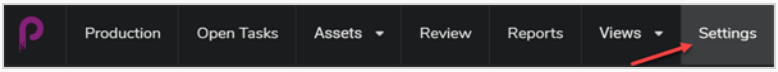
Jobs are a collection of scenes. Typically, jobs are used to separate the episodes of an animated series.

Creating Projects

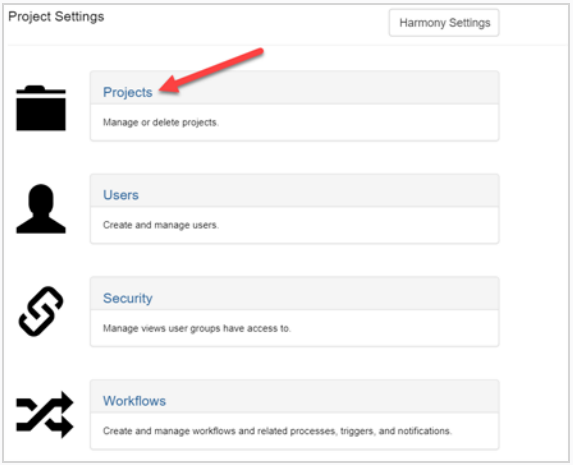
Creating a project is the first step to creating and housing environments, jobs and scenes.

How to create a project

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



The Project Settings are displayed.

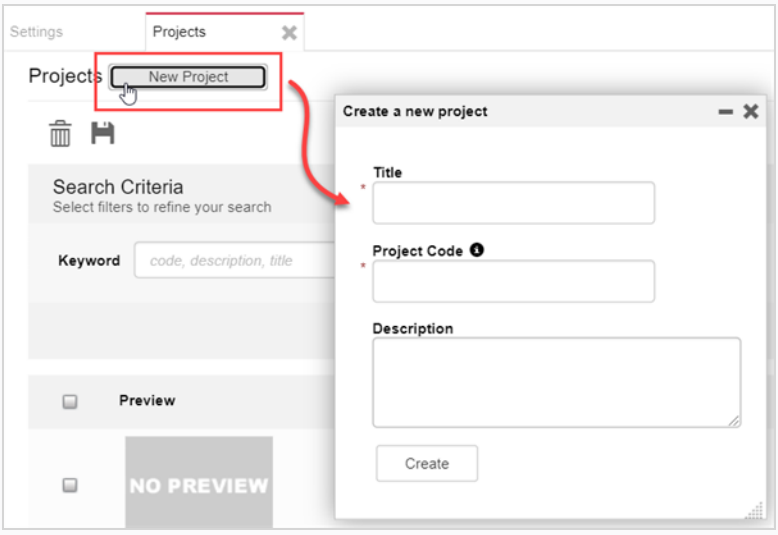


2. In the Project Settings tab, select **Project**.

   The Projects tab opens.

3. In the Projects tab, click on the **New Project** button.

   The Create a new project window appears.



4. In the Title field, enter the title of the project.
5. In the Project Code field, enter the project code.

   IMPORTANT

   The project code is a very important key that will tie many components of the project together. The project code must contain only alphanumeric characters [A-Z]/[0-9] and only an '_' as a separator.

6. Click on the **Create** button.

   A status bar appears. When it reaches 100% the Go to New Project and Close buttons appear.

7. Click on the **Go to New Project** button.

   The project appears.

Creating Environments

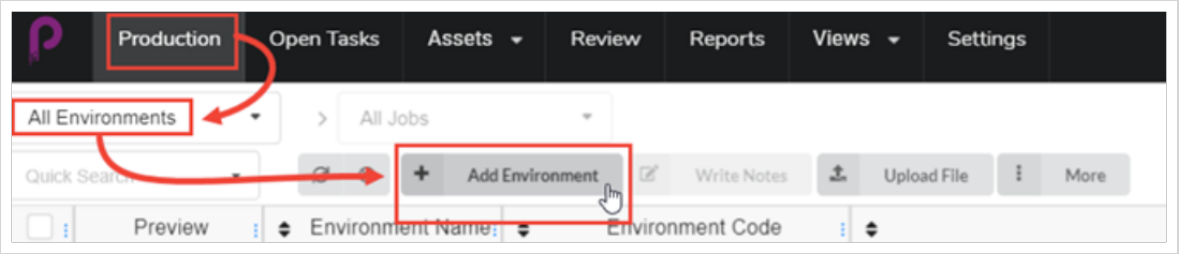
Environments are a collection of jobs, each of which is a collection of scenes. Typically, environments are used to separate the seasons of an animated series, or to separate animation series themselves. Special environments can also be created to store scenes containing character models and assets for a series.

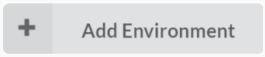
A new project does not have any environments. To start creating the structure of a project, environments must be manually created by a user with administrative privileges. A project can have as many environments as needed.

Users with the appropriate privileges can add, edit, retire, and delete environments.

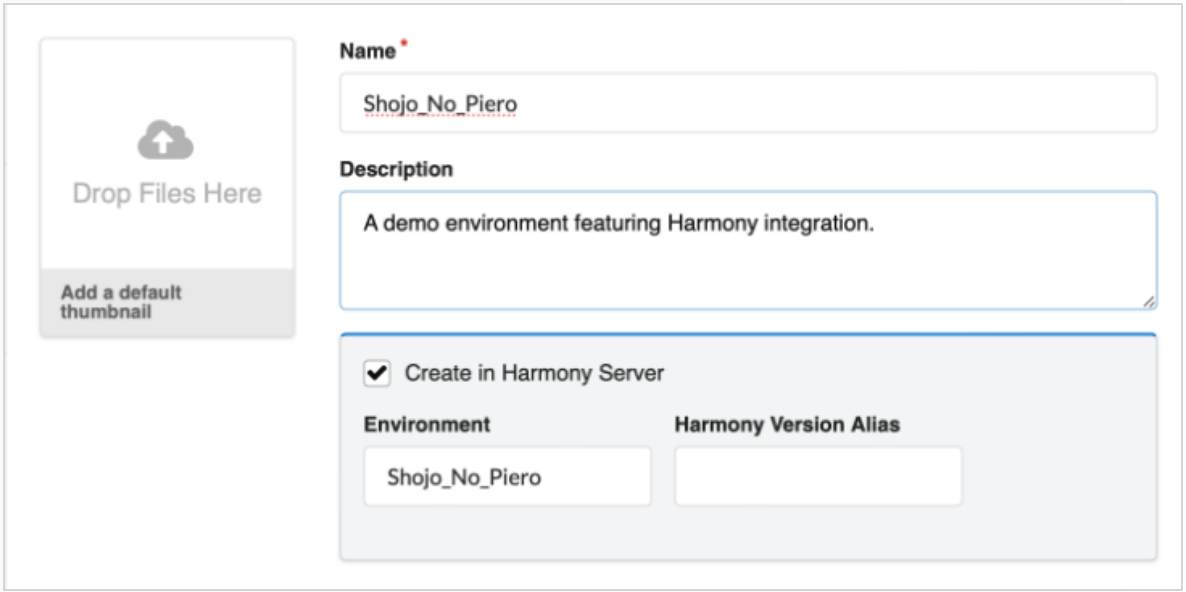
How to create an environment

1. In the main menu, select **Production**.
2. In the Environments drop-down menu, select **All Environments**.



3. Click on the Add Environment  button.

4. The Create Environment dialog opens.



- **Name:** Type in the name of the new environment.
- **[Optional] Description:** Optionally, add a description of the new environment.
- **Add a default thumbnail** box: you can optionally drag and drop a file that will be used at the environment's Preview image. This can also be done at a later time.
- **[OPTIONAL]** Check the **Create in Harmony Server** checkbox.
    - The Harmony **Environment** is automatically generated from the ***Name*** field but can be overridden. If there are spaces in the name, they will automatically be replaced by underscores. Harmony doesn't allow spaces in names.
    - **Harmony Version Alias:** You can optionally enter a label identifying a version of Harmony (See Producer Link Settings page)

NOTE

Check the **Create in Harmony Server** option box if you are using Harmony Server and want to create or register the environment in Harmony database. Do NOT check this option if not using Harmony Server.

Refer to Harmony Synchronization section for more information.

5. Click on the **Create Environment** button.

   The environment appears in your project.

Creating Jobs

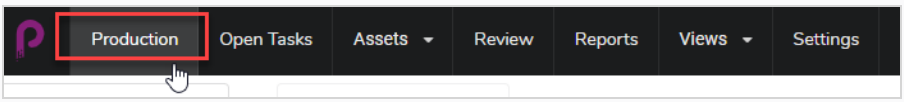
Jobs are a collection of scenes. Typically, jobs are used to separate the episodes or other segments of an animated series.

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

Users with the appropriate privileges can add, edit, retire, and delete jobs, and all users may search, open, and view jobs.

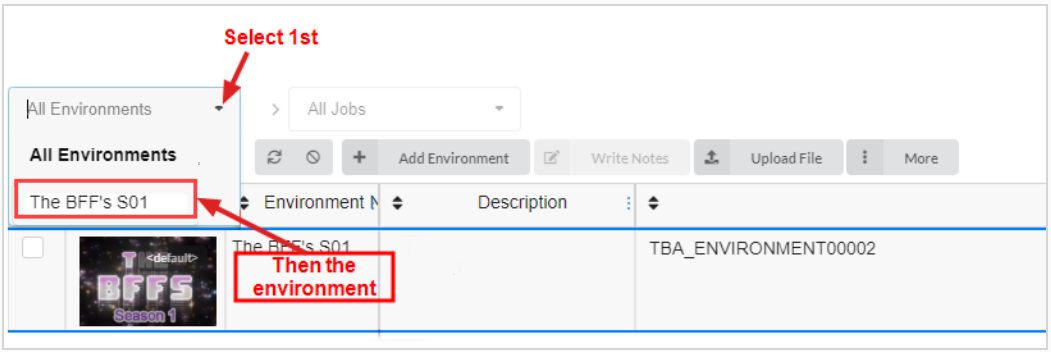
How to create a job

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

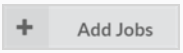


   The Production tab opens.

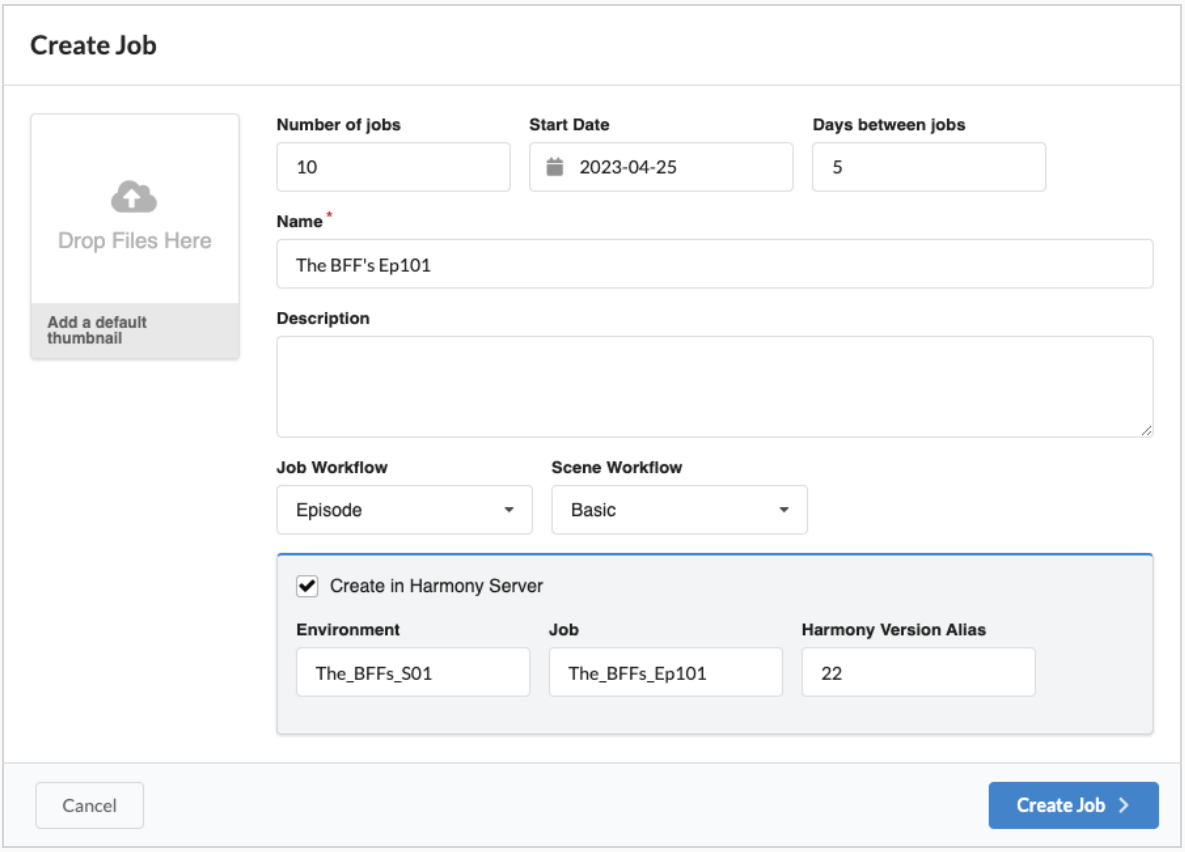
2. In the All Environments drop-down menu, select the environment you are looking for.



3. Once in the environment, click on the **Add Jobs** button.



4. The **Create Job** window appears.



- **Number of jobs:** enter the number of jobs you wish to create.
- **Start Date:** click on the calendar icon to select a start date for the first job.
- **Days between jobs:** If you entered a value greater than one for Number of jobs, enter the number of days you would like in the production schedule between jobs. This will affect the production schedule Gantt chart.
- **Name:** type in the name of the first job.

> **NOTE**
>
> If you create more than one job, it is important to add a number to the end of the name, as the other jobs will use the same name plus subsequent number.

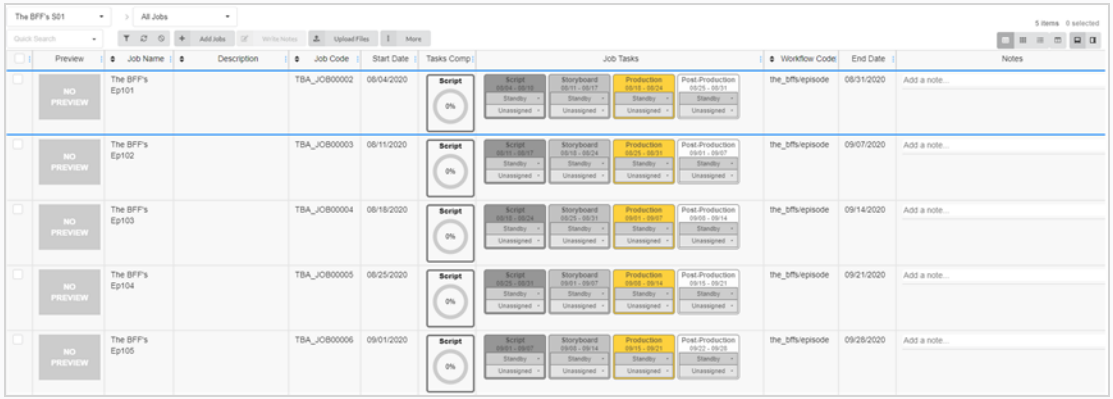
- **[Optional] Description:** Add a description of the job.
- **Job Workflow** and **Scene Workflow** drop-down menus: find the job and scene workflows that you would like to associate with the new jobs

- **[Optional]** Check the **Create in Harmony Server** checkbox if you want to create Harmony files directly to the Harmony Server (if connected).
    - The **Environment** field is automatically set from the parent Harmony environment. It can be overridden here to point to an alternate Harmony environment, but the environment will **not** be created in Harmony.
    - The **Job** field is automatically set from the one entered into the Name field. Spaces will be replaced by underscores.
    - **Harmony Version Alias:** You can optionally enter a label identifying a version of Harmony (See Producer Link Settings page)

> **NOTE**
>
> Check the Create in Harmony option box if you want to create Harmony files directly to the Harmony Server (if connected). Do NOT check this option if your scenes will be created in Harmony Standalone.

5. Click on the **Create Job** button.

Your job page will look something like this:

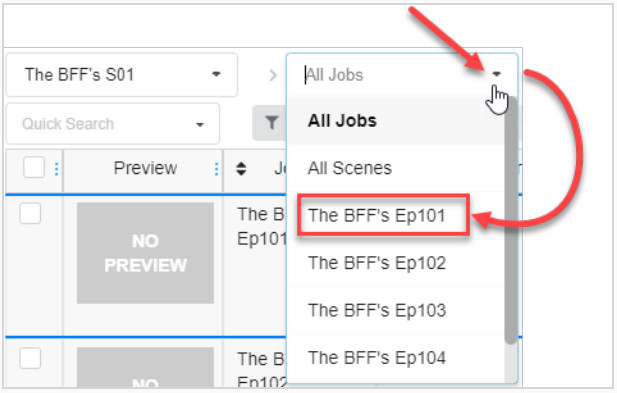


Creating Scenes

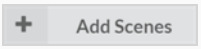
Once you've created an environment and jobs for your project, you can start to populate your job with scenes.

How to create a scene

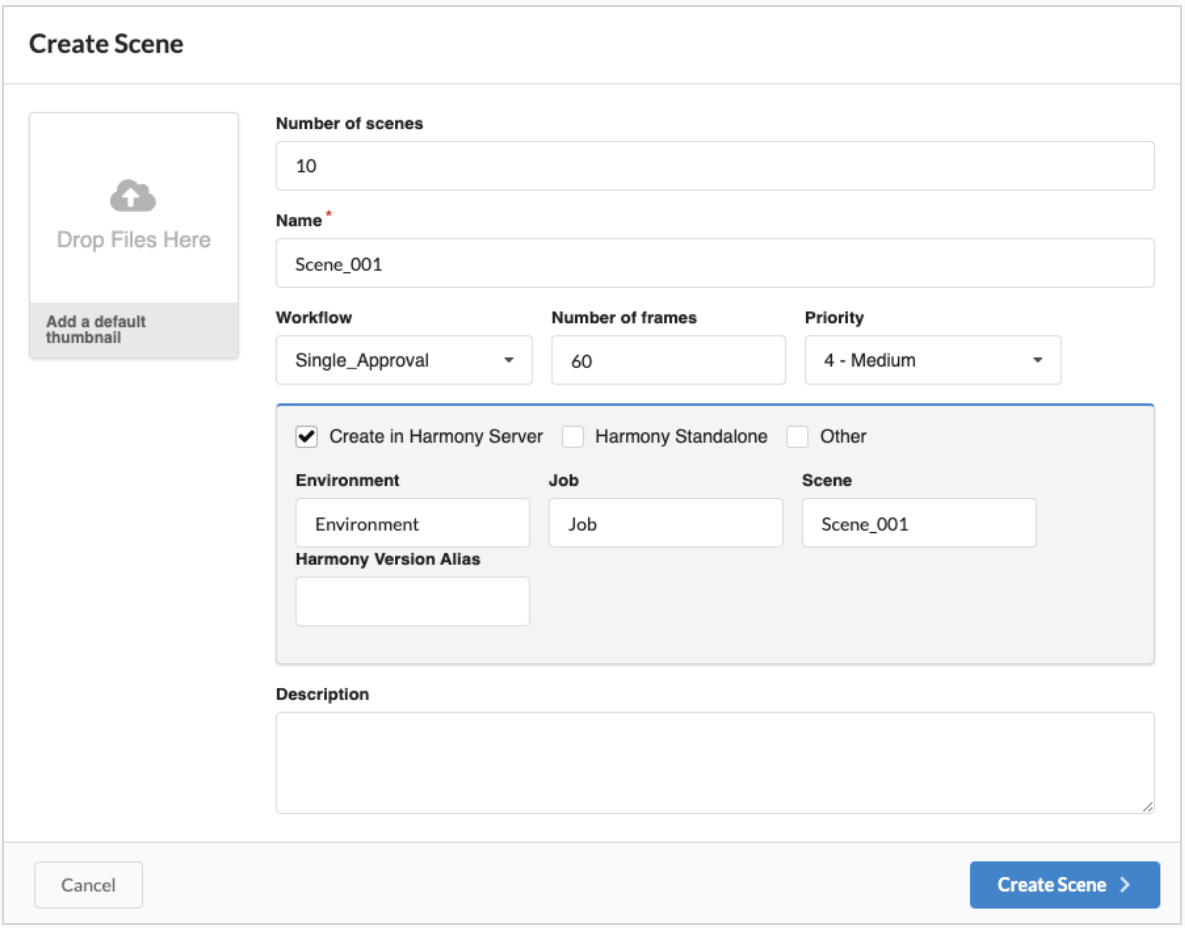
1. In the Production page, from the list of jobs, double-click on the job you would like to create scenes for. Alternatively, go to the Jobs drop-down menu and select a job from the list.



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



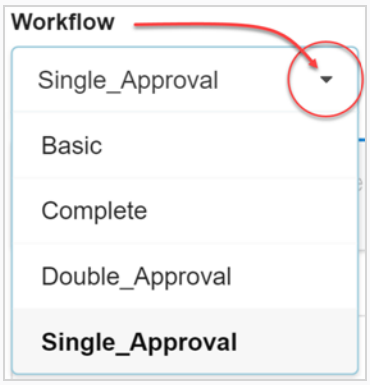
3. The Create Scene window appears.



- **Number of scenes:** Enter the number of scenes you wish to create.
- **Name:** Type in the name of the first scene.

> **NOTE**
>
> If you create more than one scene, it is important to add a number to the end of the name, as the other scenes will use the same name plus the subsequent number.

- **Workflow** drop-down: select the workflow you would like to associate with the new scenes.

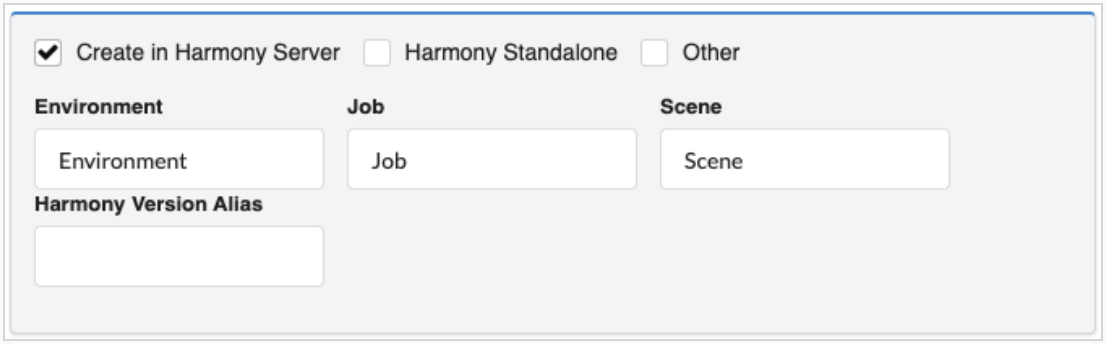


- **Number of frames:** enter a numerical value for the number of frames that you would like automatically created for each scene.
- **Priority** drop-down: select the priority (No priority, 1 - Critical to 5 - Low) for the new scenes.
- **[Optional] Description:** optionally add a description for the scene

4. **OPTIONAL:** Link the scene to an actual file by selecting one of the three proposed options:

   a. **Create in Harmony Server**: Link a Harmony Scene asset by checking the box.

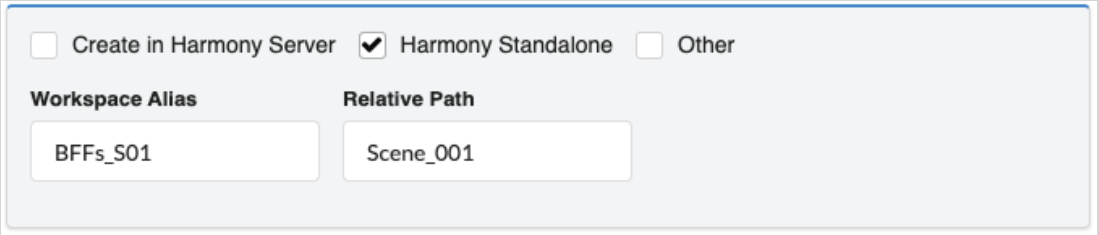
   Fill in the Environment name, Job name, Scene name and Harmony Version Alias, if applicable.



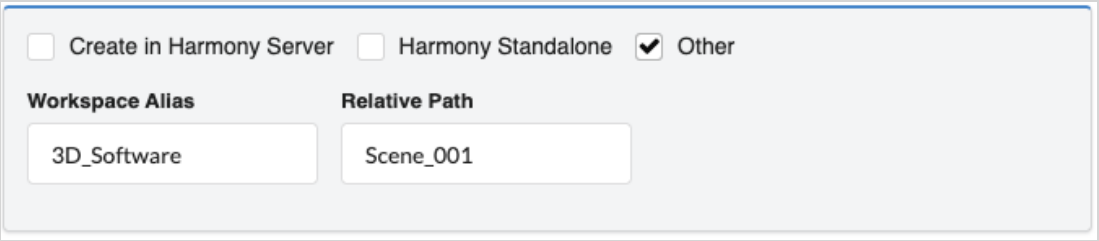
> **NOTE**
> This will create the scene on the Harmony Server, but the Environment and Job must already exist in Harmony. If the scene already exists in Harmony, this will simply link to that scene.

   OR

b. **Harmony Standalone**: Links to a scene from a standalone version of Harmony. Fill in a Workspace Alias and Relative Path.



c. **Other:** Links to another type of scene from a third party software.



5. Click the **Create Scene** button.

   The scene(s) are added to your job.

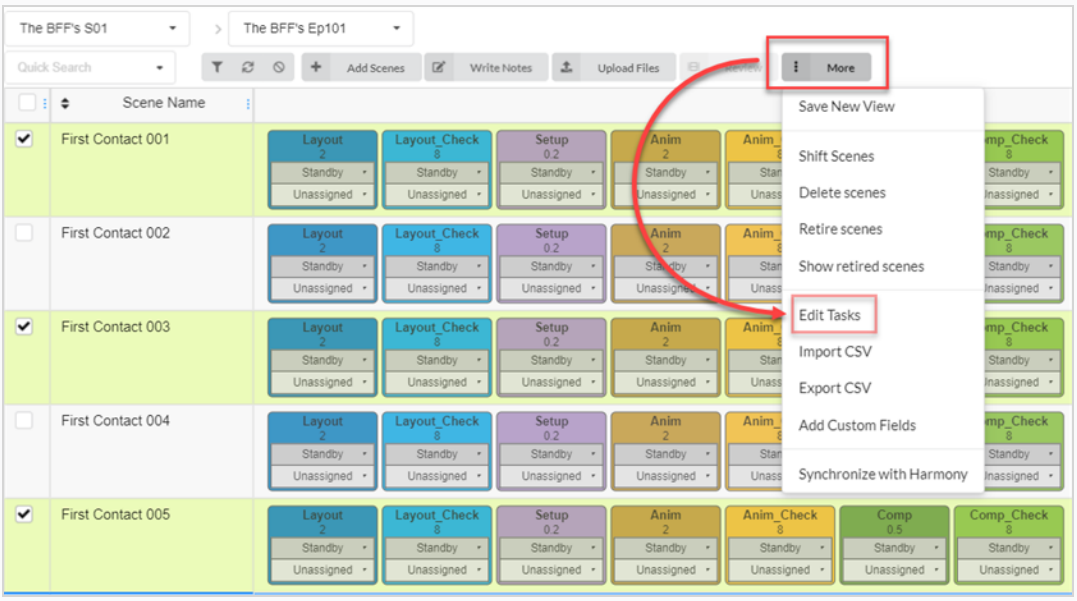
Editing Tasks

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

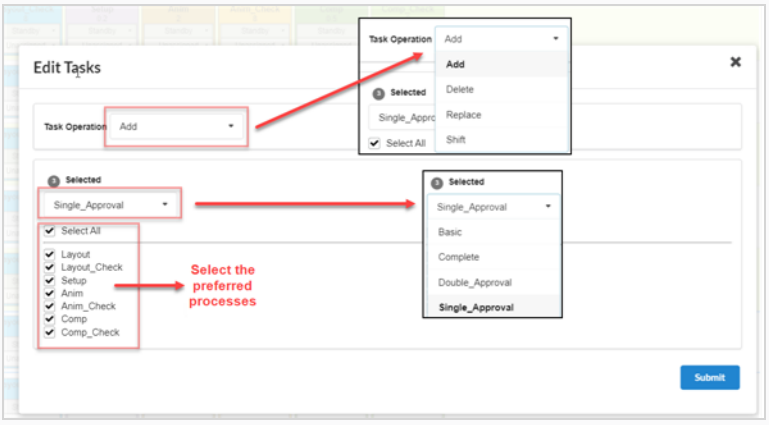
How to edit a task

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

   The tab is populated.
3. From the list, select the assets to edit by checking their checkboxes.
4. In the tab toolbar, select **More** > **Edit Tasks**.



The Edit Tasks window appears.



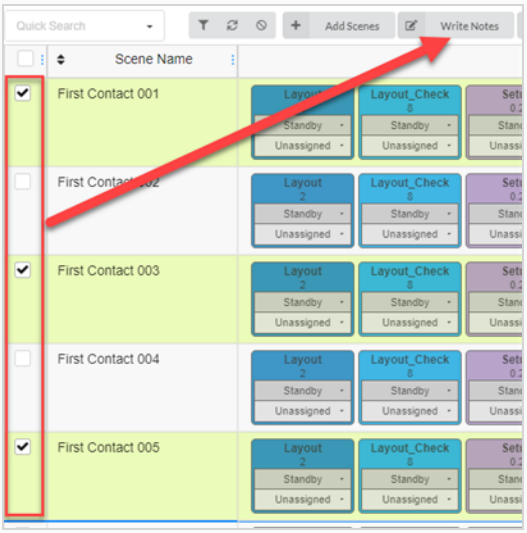
5. In the Task Operation drop-down menu, select one of the following:
    - **Add** - To add missing tasks to selection
    - **Delete** - To delete existing tasks from selection
    - **Replace** - To replace some or all tasks for the selection
    - **Shift**
6. In the Selected drop-down menu, change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

Writing Notes

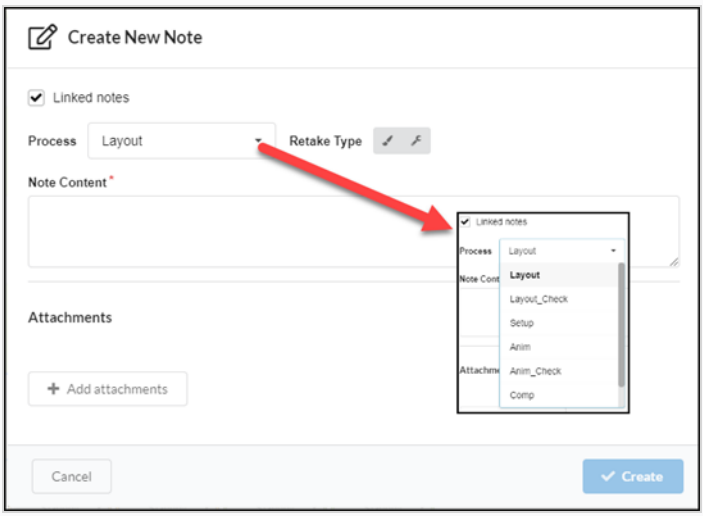
The Write Notes feature allows you to create notes on one or multiple scenes that have been selected.

How to create a note

1. In the top menu, select either **Production** or **Assets > Manage**.
2. From the drop-down menus, located under the main menu, bring up a list of environments, jobs or scenes.
3. From this list, select which you would like to add notes to by checking their corresponding check box.
4. In the tab toolbar, click on the **Write Notes** button.



The Create New Note dialog box appears.

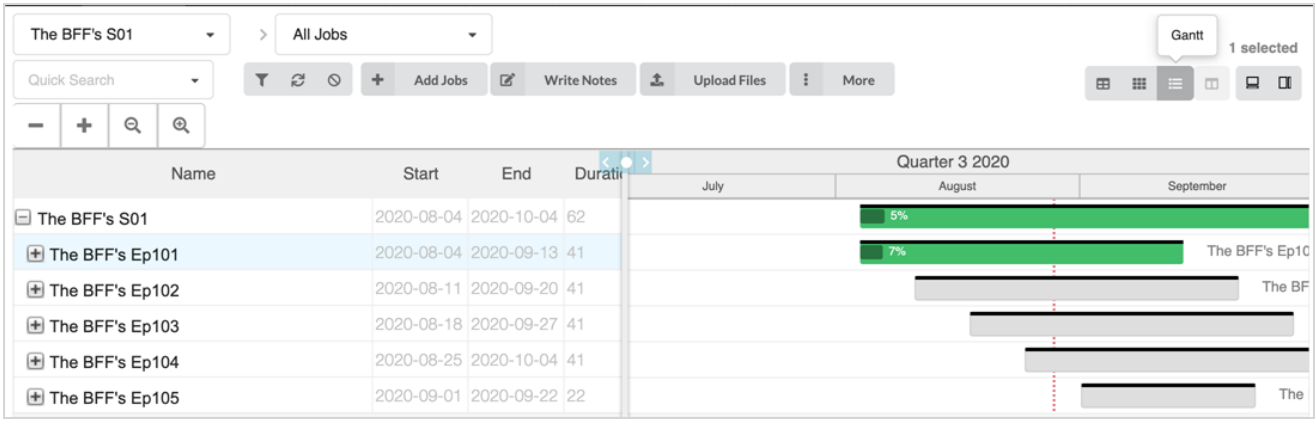


5. Check the Link notes option if you want changes in one note to automatically update in the other notes for all the assets you selected.
6. In the Process drop-down menu, select the task/process in the worklfow that you would like to add the note to.
7. Select the retake type (ie: artistic, technical, or both).
8. In the Note Content field, type in your note.
9. Click on the Add attachments button if you would like to add an attachment.
10. Click the **Create** button.

    The note is added to the selected assets.

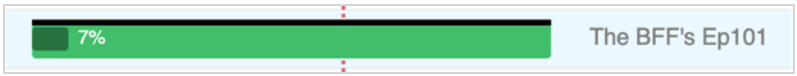
Gantt Charts

A Gantt chart is available from the Production page under All jobs of any environment. It can be displayed by switching layout type along List and Tiles views.

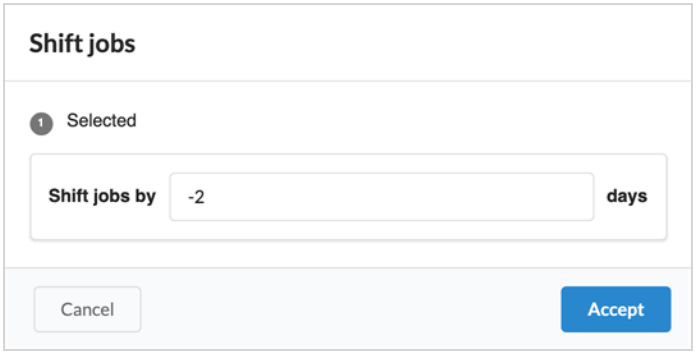


The Gantt chart lists all current jobs and their tasks for the selected environment. It can be collapsed to have an overview of when jobs should start and end over time or it can be fully expanded to display all tasks for every job. Every row displays the name, duration (in days), start and end dates for the environment, it's jobs and all tasks from their workflow.

On the right side, there is a timeline and progress bar for each row, it will turn from grey to green when tasks start getting approved or completed. There is also a completion % that indicates the progress for each task, every job and the environment itself.



If a job needs to be shifted over in time, simply highlight the desired job and click on More in the menu above the table, then select Shift Jobs. In the Shift Jobs window, simply select the number of days it will be shifted over (jobs can be shifted in the future or in the past, using positive or negative values).



Scene Focus View

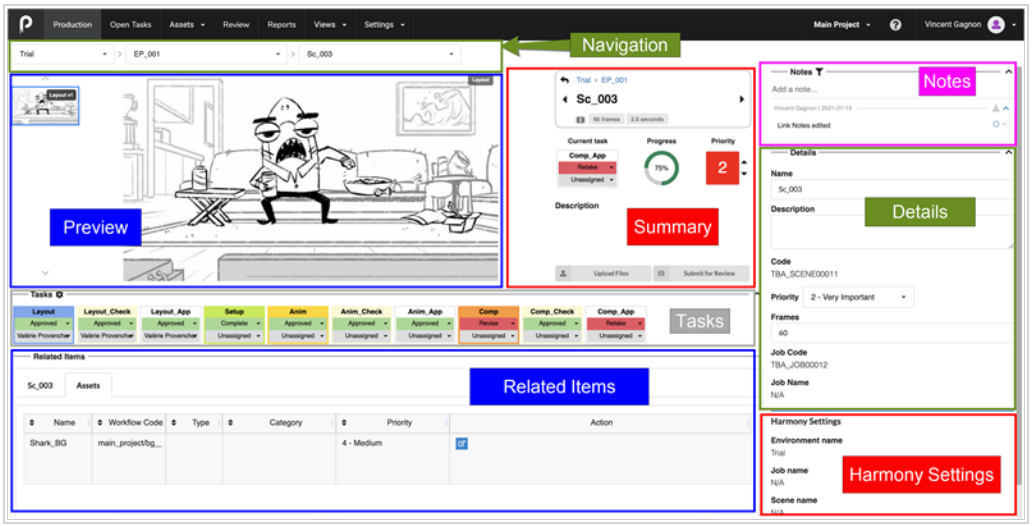
This section provides the details related to a scene (Status, Assignee, Notes, Associated Assets) so that one can focus on that given scene without being distracted by the information of other scenes, as may be the case when viewing multiple scenes in the production page.

How to access Scene Focus View

Do one of the following:

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

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



The Scene Focus view is divided in multiple sections:

Option	Description
Navigation	Allows you to select a specific scene to focus. You can also exit the focus view, by selecting a Job/Episode in the second drop-down list. Refer to Focus View Navigation Section for more information.
Summary	Displays the name of the scene and provides information on the current process, its Status and Assignee. It also displays useful information such as the overall progress of the scene, the completion of the Assets associated

Option	Description
	with this scene, the current priority and the description. You can perform the following two actions here: • Upload Files • Submit for Review
Preview	The Preview of the latest snapshot is prominently displayed and can be played back.
Tasks	Below the Preview section, the Tasks section shows all the tasks related to the selected scene. It is possible, if you have the rights, to edit the status and assignee directly from here.
Related Items	This section is located at the bottom left. It will list any assets associated with the current scene. Double-clicking on a line or clicking on the icon will bring forth the Focus View for that associated asset. Refer to the Associated Asset Focus View section.
Notes	This section is similar to the one you would find in the side panel of any Production Page. It will list all the Notes related to the current scene and allows you to enter new Notes.
Details	This section is similar to the one you would find in the side panel of any Production Page. It will list all the Details of the current scene and allows you to edit them.
Harmony Settings	This section provides the environment, job and scene name details used for the Harmony server integration. The names can be modified using the “Edit External Reference” button.

Focus View Navigation

In the example below, the associated asset Wizard_BG was selected from the Production page’s Daredev_01_001 scene.

Clicking on Daredv_01_001 will bring the user back to the scene’s focus view.

Clicking on Daredv_01 will bring the user back to the scene list for that job

Clicking on Daredevil will bring the user back to the job list for that environment

Clicking on the back arrow will bring the previous level (same as clicking Daredv_01_001)

Selecting the right/left arrows will bring the next/previous asset in the scene's associated assets.

Associated Asset Focus View

In a Scene Focus View, double-clicking on an associated asset (or clicking on the open icon) brings that asset's Focus View.

Sections below to add to Asset and Open Tasks

In an Asset Focus View, double-clicking on an associated scene (or clicking on the open icon) brings that scene's Focus View.

In an Open Tasks Focus View, double-clicking on an associated scene or asset (or clicking on the open icon) brings that item's Focus View.

NOTE

It is not possible to access another level of recursion (ie: double clicking on a scene in an asset focus view does not navigate to a Scene Focus View etc).

Chapter 5: Assets

Assets are typically any component of a production use to produce scenes and track in Producer. This can include character sheets, model references, character rigs, backgrounds, music, and more.

Producer can track the progress and location of all your assets.

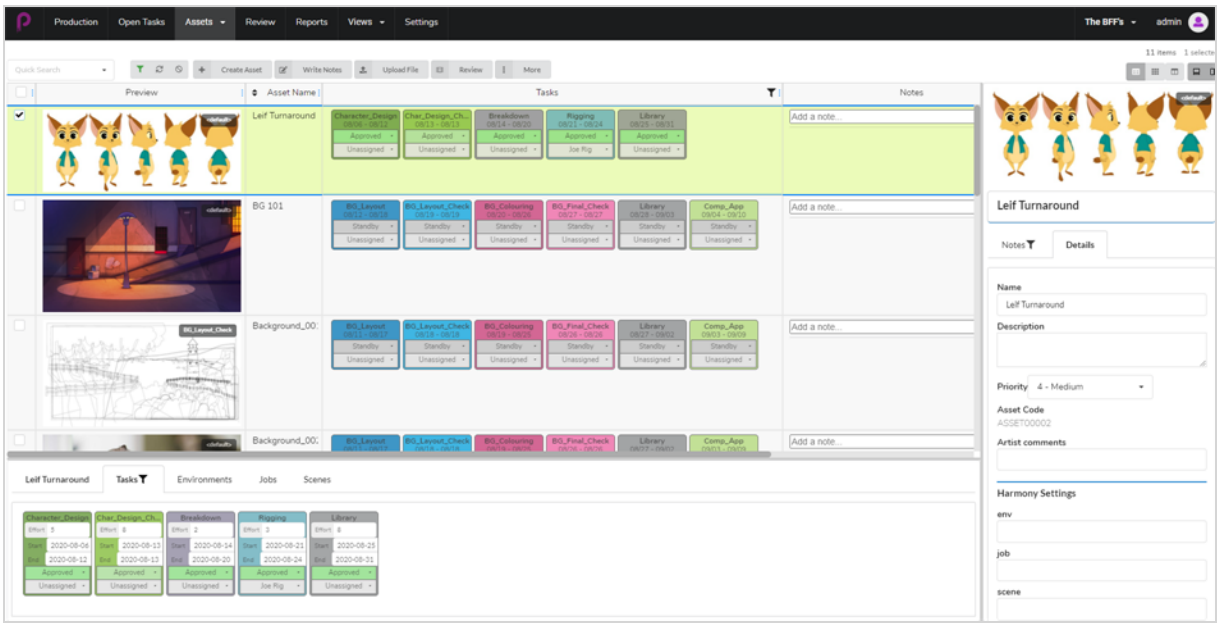
Assets can be sorted one of two ways:

- **Categories**: Asset categories are a way of classifying assets based on the purpose of an asset within a production, such as characters, backgrounds, props, and more.
- **Types**: Types can be used to categorize the type of file, such as a PNG, JPEG, MOV, MP4, GIF, PSD, or PDF.

The following image types are supported for assets: PNG, JPEG, GIF, BMP, TGA, TIFF, PSD, AI, PDF, MP4, MOV.

Interface

An asset has many properties and attributes. By default, the Asset page only displays some information about each asset in the asset list.



To display more information on an asset, depending on the type of information you want to see, you may have to:

- Add a column containing this information to the asset list.
- Select a specific asset, then open either the side panel or the bottom panel to view more information about it.

Columns in the asset list can display the following information:

- Selector
- Preview
- Tasks
- Asset Name
- Description
- Type
- Category
- Notes
- Priority
- Completion

- Workflow Code
- Asset Code
- Harmony Status

The side panel displays the following information:

- Preview thumbnail
- Name
- Description
- Priority
- Asset Code
- Notes
- Harmony Settings: environment/job/scene/harmony version

The bottom panel displays the following information:

- Tasks
- Environments
- Jobs
- Scenes

The following table lists each type of information about an asset, and which method will display it:

Information	Description	Asset List	Side Panel	Bottom Panel
Preview	The preview thumbnail for the asset.	Preview column	Side panel	N/A
Tasks	A step in a workflow.	Tasks column	N/A	Tasks tab
Asset Name	The display name of the asset.	Name column	Details tab	N/A
Description	The description of the asset.	Description column	Details tab	N/A
Asset Type	Categories can be used to identify the purpose of an asset.	Asset type column	N/A	N/A

Asset Category	Types can be used to categorize the file type.	Category column	N/A	N/A
Notes	All the notes that were added to the asset.	Notes column	Notes tab	N/A
Priority	A rank indicating the importance of a given asset.	Priority column	N/A	N/A
Open Harmony	If Producer has been configured to synchronize with Harmony, you can click this button to open the asset directly in Harmony.	Open Harmony column	N/A	N/A
Completion	A progress wheel tracking the percentage of the asset that has been completed.	Completion column	N/A	N/A
Workflow Code	The type of workflow being used for the asset.	Workflow Code column	N/A	N/A
Asset Code		Asset Code column	N/A	N/A
Scene Asset Code	If a scene has been converted to an asset, this is the code of the asset it is linked to.	Scene Asset Code column	Side panel	N/A

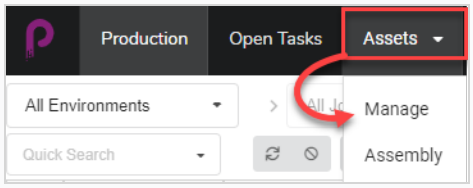
Creating Assets

Upload scripts, characters, backgrounds and 3D models to help visually assist your task workflow.

Users with administrative privileges can create one or more assets at a time.

How to create assets

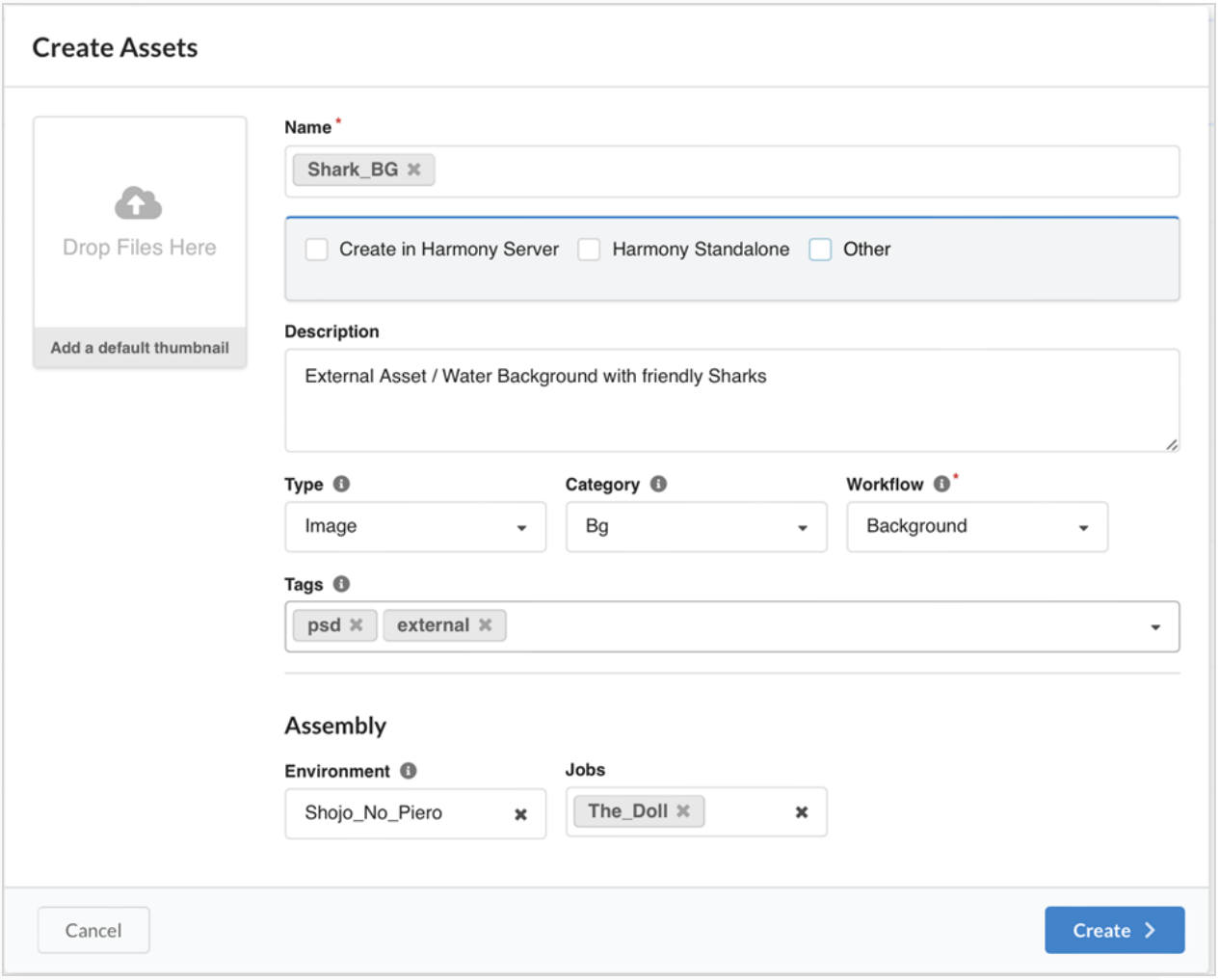
1. In the top menu, click **Assets > Manage**.



   The assets list opens.

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

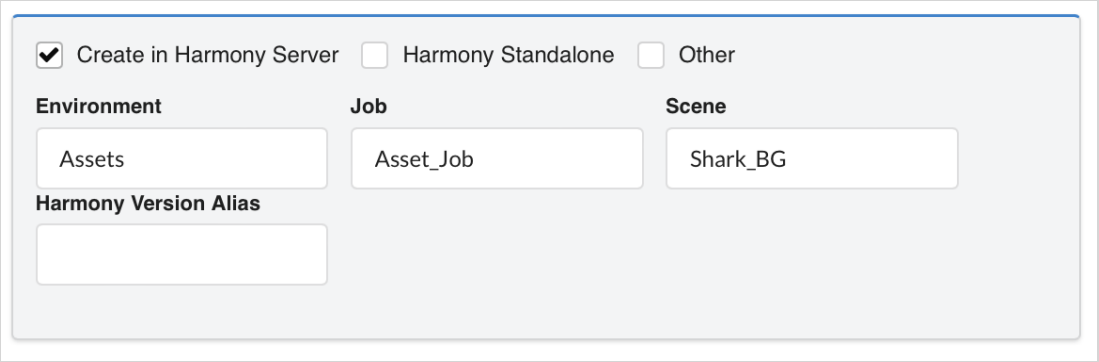
   The Create Asset dialog box appears.



3. Upload a thumbnail for your asset by clicking and dragging your file into the Drop Files Here box.
4. In the Name field, type in a name for your new asset. It must be unique or else an error will occur.

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

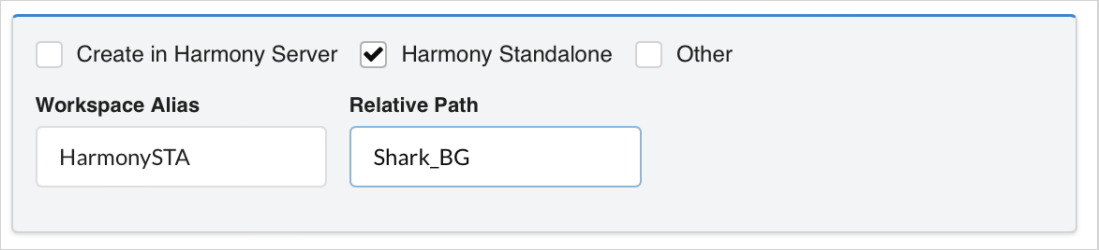
5. OPTIONAL: Link the asset to an actual file by selecting one of the three proposed options:
    a. **Create in Harmony Server**: Fill in the Environment, Job, Scene and Harmony Version Alias fields to link the asset from an existing Harmony scene.



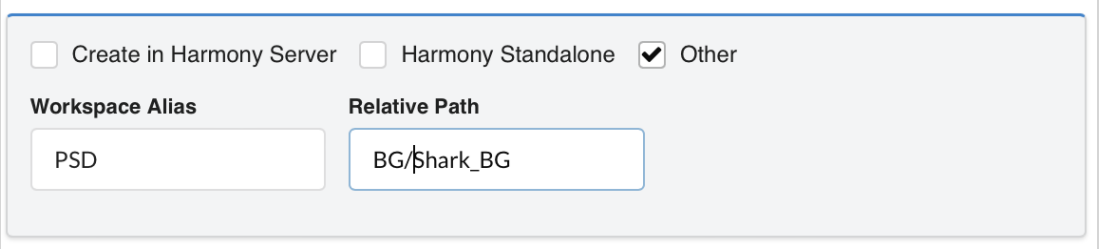
NOTE

This will create the scene on the Harmony Server, but the Environment and Job must already exist in Harmony. If the scene already exists in Harmony, this will simply link to that scene

b. **Harmony Standalone**: Links to an asset from a standalone version of Harmony.



c. **Other**: Links to another type of asset from a third party software.



TIP

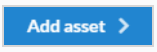
An external asset is an asset which is not a Harmony Scene. It can be any type of file, such as an image (psd or other), a sound file. Producer only needs to know where that file is located. **Producer Link** may be used to upload snapshots for these assets.

6. In the Description field, type in a description for the asset.
7. In the Type drop-down menu, select what type (3D Model, Image, etc.) of asset you intend to upload.
8. In the Category drop-down menu, select a category (Bg, Main Character, etc.) for the asset type .
9. In the **Workflow** drop-down menu, select your workflow (background, character or prop).

   > **NOTE**
   >
   > This field is mandatory.

10. In the Tags field, type any words you would like to associate with the asset that can later be used in searches. Hit **Enter** after typing each tag to validate it.
11. In the Assembly section, from the Environment drop-down menu, select an environment.

    The Jobs drop-down menu is enabled.
12. In the Assembly section, from the Jobs drop-down menu, select a job.
13. To save your new assets, click the Add Asset button.

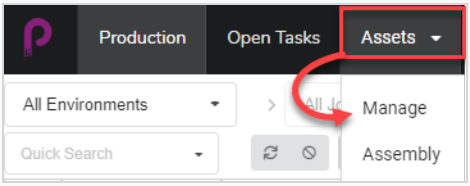
    Your assets are now available in the asset list.

Searching for Assets

If you have a lot of assets and you need to find a specific asset, you can filter the assets in the list using keywords from their descriptions. You can also choose to only view assets associated with specific environments, jobs or based on the specific process, status or user they are assigned to.

How to search for assets using keywords

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

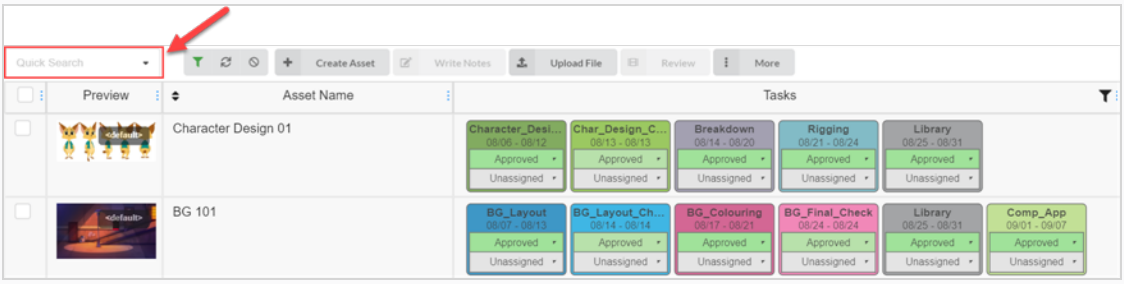


The asset list opens.

> **TIP**
>
> To include retired items in your search results, in the toolbar above the asset list, click More and, in the pop-up menu, select **Show Retired** Items.

2. In the toolbar above the asset list, click in the Quick Search field and type in all or part of the name of the asset you would like to find. Hit the **Enter** key to initiate the search.

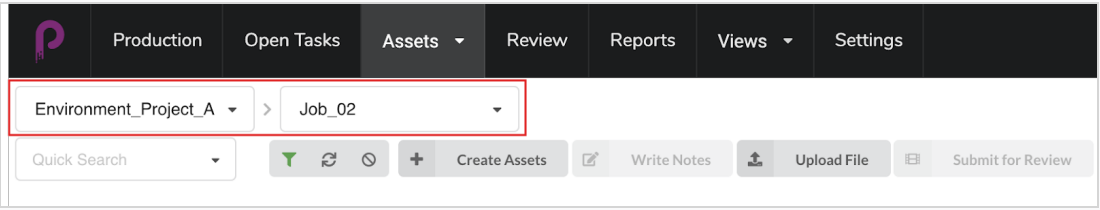
> **TIP**
>
> When an asset is created, the creator had the option to associate certain words with the asset (tags)—see Creating Assets. These tags are usually descriptive of the asset and can now come in handy when doing a search.



Assets containing your search term appear.

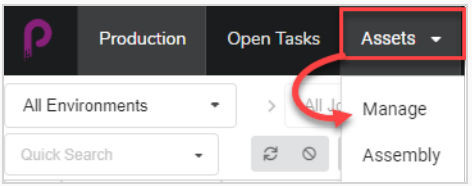
3. You can repeat this step to add several search terms. Only assets containing all of your search terms in their name will appear in the list.

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



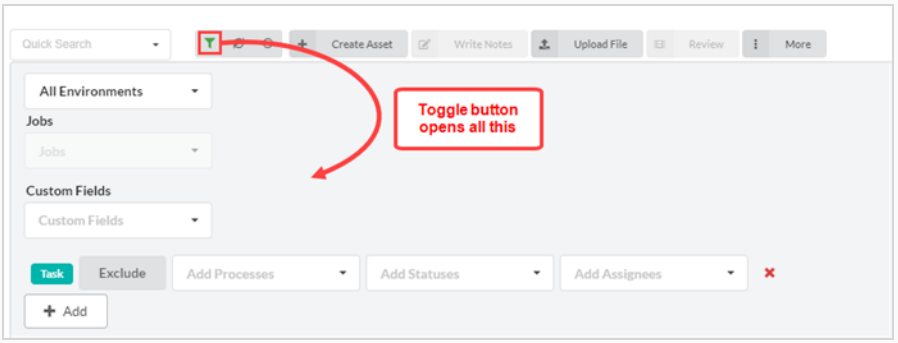
How to filter assets by their tasks, statuses and assignees

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



The assets list opens.

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



The search panel appears.

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

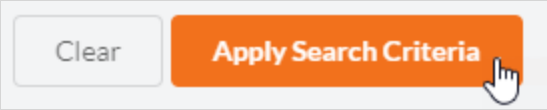
   The Jobs drop-down menu is enabled.

4. Use the Jobs drop-down menu and Custom Fields fields to continue refining your search. If you need more filters or a different set, click on the Add button to bring up the Add Processes, Add Statuses and Add Assignees drop-down menus. You can use this second set of filters to exclude, rather than include, additional information by clicking on the Exclude button.

   Use some or all of these filters at your discretion.

   You can add several items from any of these categories by clicking on the Add button to create another row of the same filters. An example of where this might be useful is when you need to search for 2 different processes assigned to the same person.

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

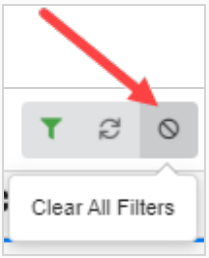
   

   The assets that match your search appear in the asset list.

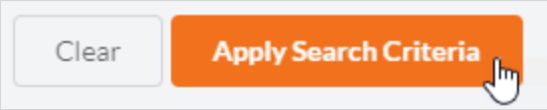
How to clear search terms and filters

Do one of the following:

- Click the ✖ on all search terms in the Quick Search text box.
- Hit the Backspace key to remove the last search term until all the search terms have been erased.
- In the toolbar at the top of the assets list, use the Clear All Filters button

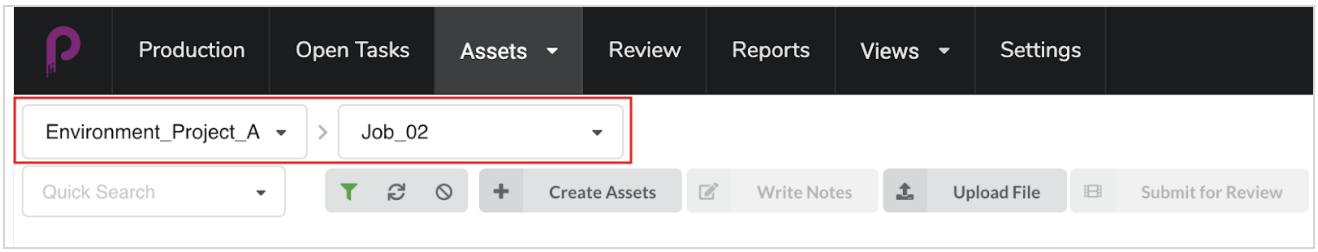
- At the bottom of the Search Panel, click on the **Clear** button.

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

Navigating Assets

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

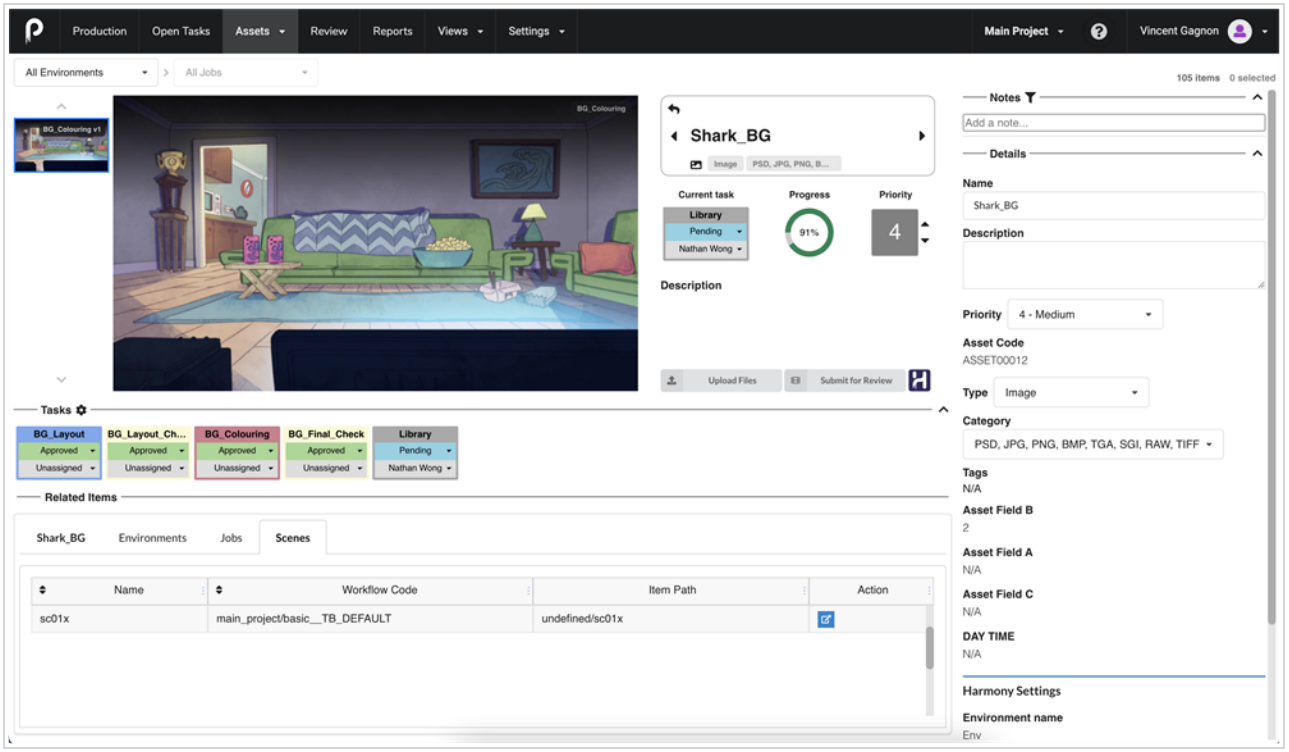


NOTE

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

Asset Focus View

To access the asset focus view, simply double click any asset from the list.



Associated Scene Focus View

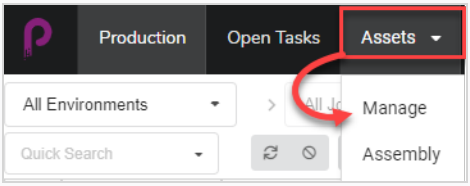
In an Asset Focus View, double-clicking on a Related Items (or clicking on the open icon) brings that scene’s Focus View.

Editing an Asset

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

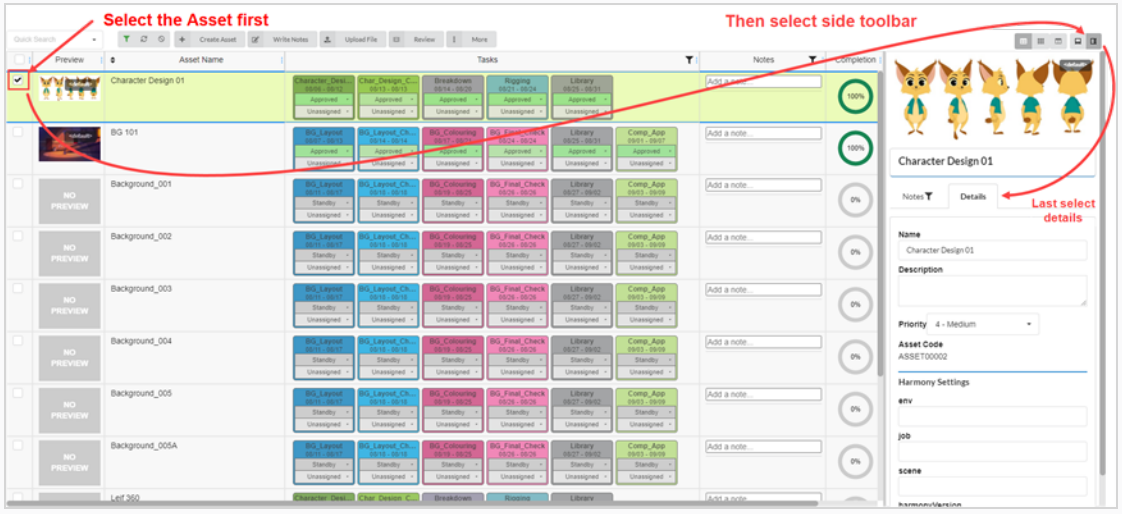
How to edit the name and description of an asset

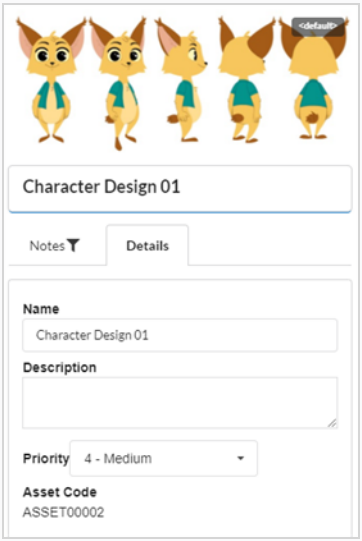
1. In the top menu, click **Assets > Manage**.



   The assets list opens.

2. In the asset list, click on the check box of the asset you wish to edit.
3. If the side panel is not visible, in the toolbar at the top-right corner of the asset list, click the Toggle Side Panel button to display it.
4. In the side panel, select the Details tab.





5. To rename the selected asset, in the Name field, type in a new name.
6. To update the description of the asset, in the Description field, type in a new description.
7. To change the priority of the selected asset, from the Priority drop-down menu, select a new priority.
8. To save your changes, click anywhere outside the side panel.

   A toaster notification (pop-up) appears in the bottom-right corner of the page, indicating that the asset is being updated. When the toaster notification disappears, the asset changes are saved.

Deleting an Asset

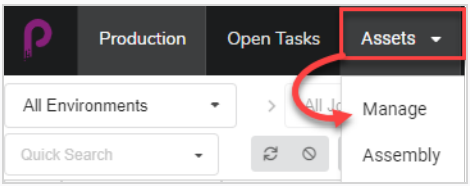
Assets can be permanently deleted.

NOTE

Deleting an asset will delete all of its tasks, previews(uploads) and assembly data. Deleted items will be permanently lost, and cannot be restored.

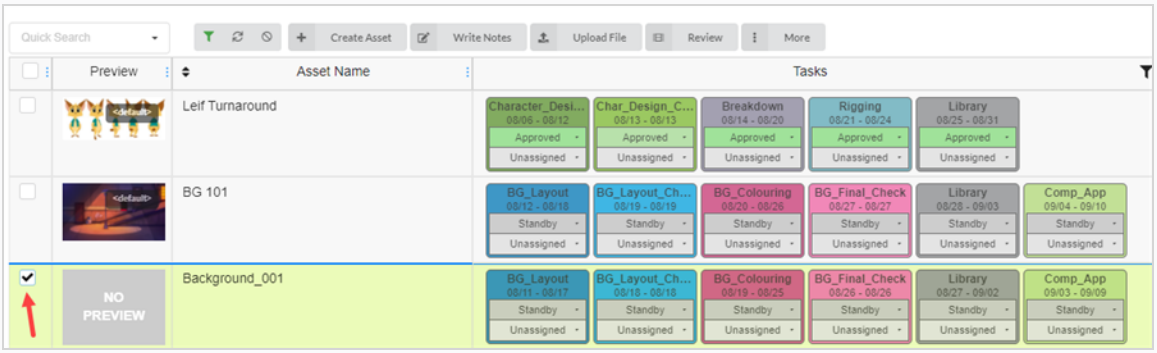
How to delete assets

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

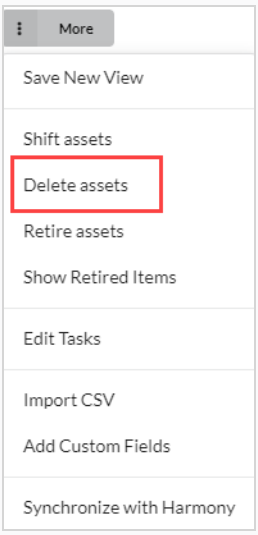


   The Asset list opens.

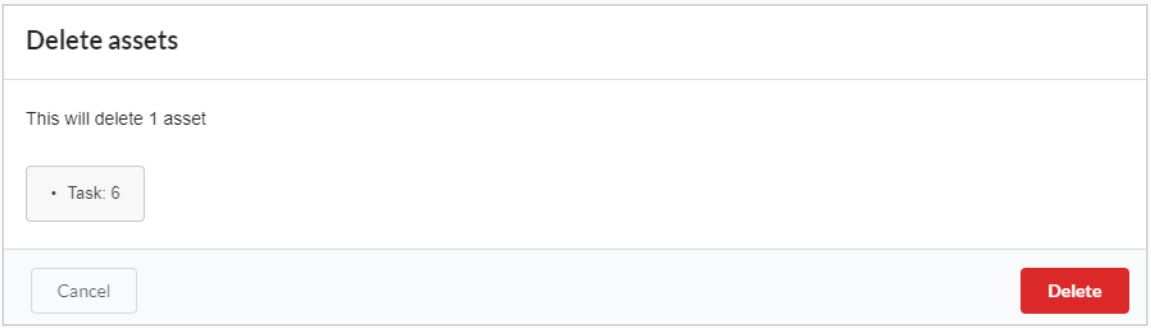
2. In the Asset list, enable the checkbox on the far left column of the item you wish to delete.



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



The Delete Assets dialog box opens.



4. In the confirmation prompt, click **Delete**.

   The asset has now been deleted.

Adding a Preview Image for an Asset

You can add or change a preview image of any asset that appears in the Preview column in the asset list. This can be done from either the Assest > Manage tab or the Production tab.

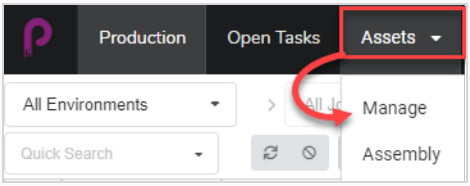
The following image types are supported for preview images: PNG, JPEG, GIF, BMP, TGA, TIFF, PSD, AI and PDF.

If you upload a movie clip (MP4 or MOV) as a preview, the first frame of the movie will automatically be set as the image. You will be able to play the clip from the Preview column.

For an animated GIF or video file, the first frame will automatically be set as the preview image. You will NOT be able to play these files.

How to add or change a preview image

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

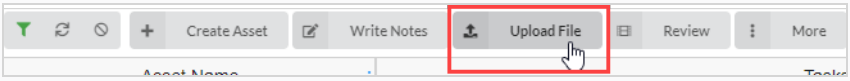


   The assets list opens.

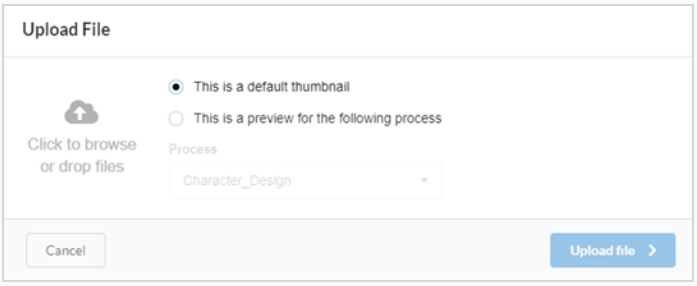
   OR

   In the top menu, click on the **Production** tab.

2. Use the All Enviroments and/or All Jobs drop-down menu filters to bring up the desired asset(s).
3. Click the check box of the asset whose thumbnail you wish to change.
4. In the toolbar above the asset list, click on the **Upload File** button.



   The Upload File dialog box appears.

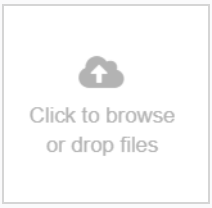


5. Select one of the following options:

- **This is a default thumbnail** to upload an image or movie clip (MP4 or MOV) that will be a visual reference for all the tasks in the selected row.
- **This is a preview for the following process** to associate an image or movie clip (MP4 or MOV) with a specific task in the selected row.

  When selecting this option, the Process drop-down menu is enabled. Select the task you want to associate with the preview image from this list. After the file is uploaded, the name of the task will appear near the corner of the thumbnail.

6. To upload an image, either click on the Click to browse button or drag and drop the file over it.



7. Click the **Upload File** button.

   The selected image/movie clip appears in the Preview column.

> **TIP**
>
> To view the full-size image/movie clip, click on the Open the image in a new tab icon that appears when you hover over the bottom of the preview image.

Downloading an Asset Movie Clip

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

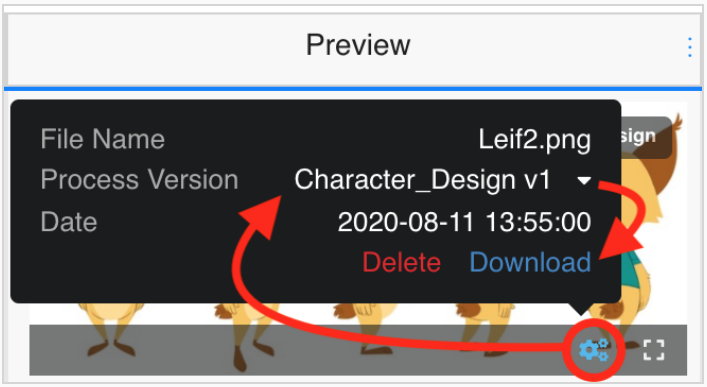
How to download an asset movie clip

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

   The assets list opens.

2. If the Preview column is not displayed, in the toolbar above the assets list, enable it from the Column selector button.

3. Hover your mouse cursor over the Preview thumbnail and click on the gear icon.



   A black dialog box appears.

4. Click on the **Download** option.

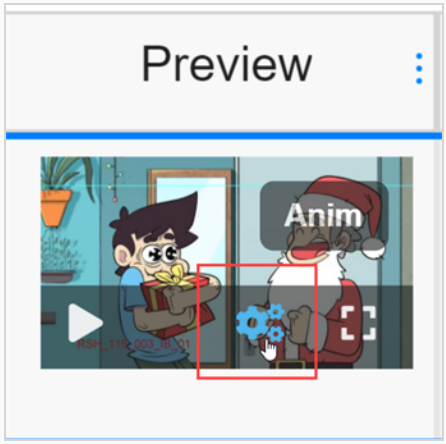
   The movie file is downloaded to your computer.

Viewing Preview Image Versions

Producer gives you the ability to view different Preview images and movie clips associated with a certain Environment/Job/Scene/Task.

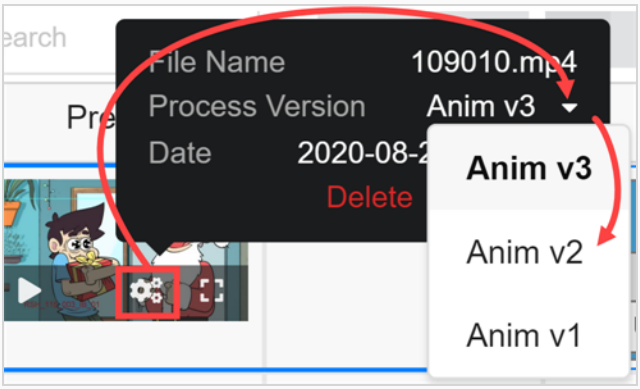
How to view different versions of Preview images and movie clips

1. Hover your mouse over a Preview image.



   A menu bar appears.

2. Click on the gear icon.



   An information and dialog box appears.

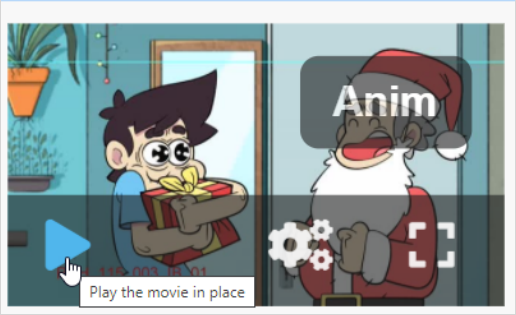
3. In Process Version, click on the down arrow.

   If different image or movie clip options exist, they appear in the drop-down list. Select the one you wish to view.

   If a Preview images or movie clip was uploaded for the global environment, it has the naming convention <default> + version number. If an image or movie clip was associated with a specific task during the upload process, it has the naming convention "task name" + version number—see

Adding a Preview Image for an Asset. In this example, the movie clip is associated with the Anim task and has 3 versions available.

4. If the image is a still frame from a movie clip, click on the play button to preview the movie clip.



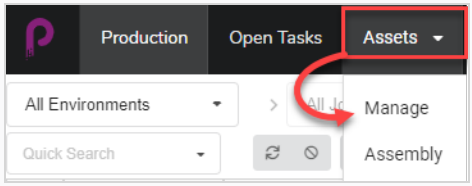
5. If you would like to see a full-size version of the image or movie clip, click on the Open the image in a new tab icon.

Replacing Asset Tasks

If your Producer database has several asset workflows, you can change an asset's workflow by replacing all of the asset tasks with the tasks of a different workflow.

How to replace asset tasks

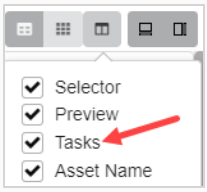
1. In the top menu, select **Assets > Manage**.



   The asset list opens.

2. Ensure the Tasks are visible by doing one of the following:

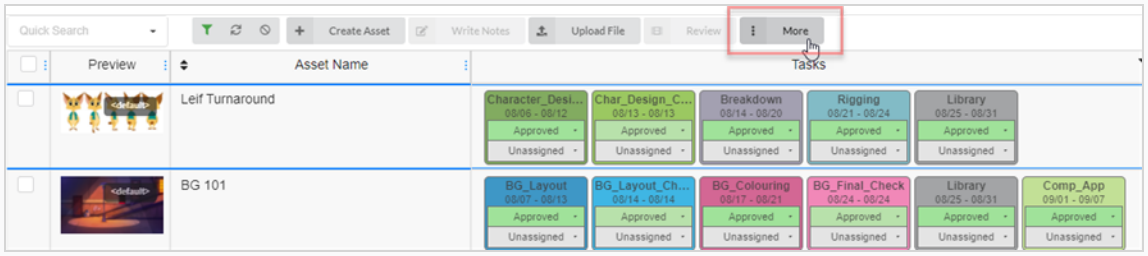
   - In the toolbar in the top-right corner, click on the Manage Columns icon, and ensure the checkbox next to the Tasks column option is checked.



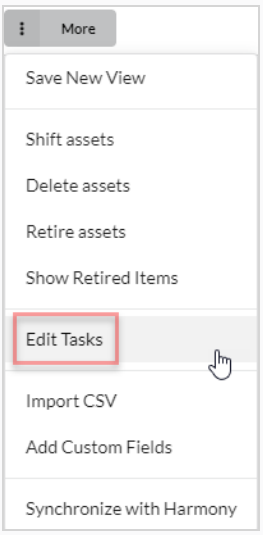
   - Select the asset in the asset list and, in the toolbar in the top-right corner, ensure the Toggle Bottom Panel button is clicked and the bottom panel is visible. Then, in the bottom panel, select the **Tasks** tab.

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

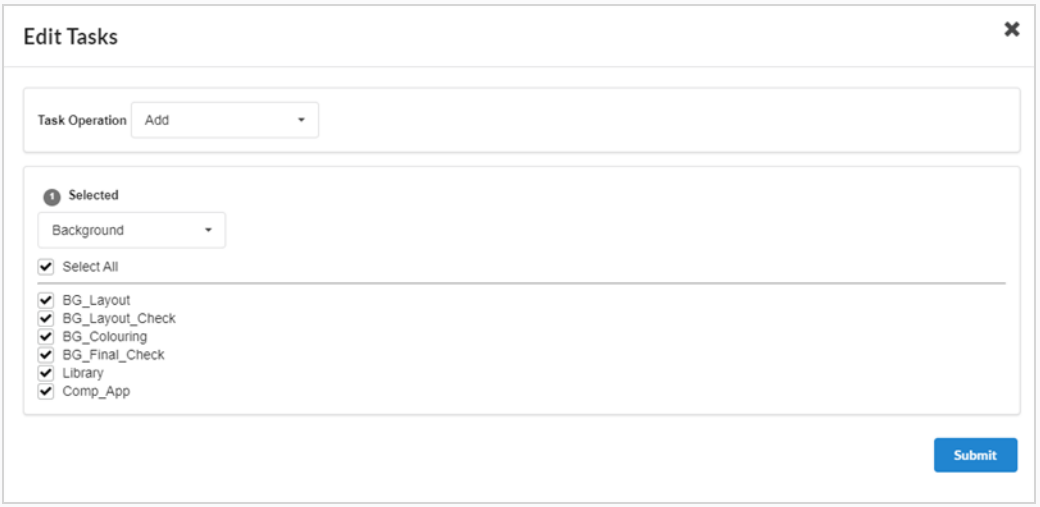
4. In the toolbar above the asset list, click on the **More** button.



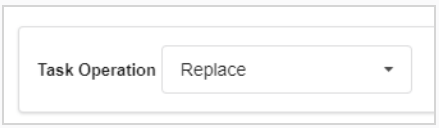
5. From the More drop-down menu, select **Edit Tasks**.



The Edit Tasks dialog box appears.

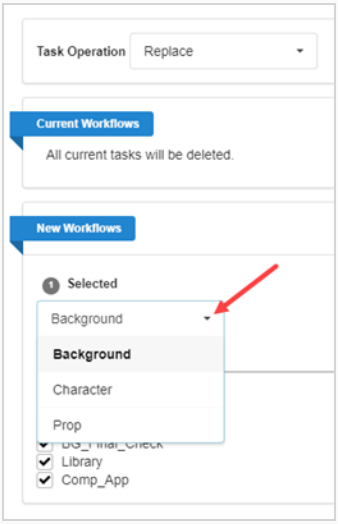


6. In the Task Operation drop-down menu, select **Replace**.

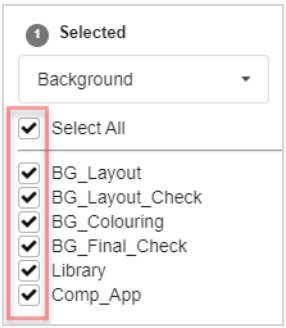


> **NOTE**
>
> All replaced tasks will lose their current assignees and statuses. If you select **Add** instead, missing tasks are added and existing ones are untouched—see Adding Tasks .

7. In the drop-down just below, select the workflow you wish to use.



8. By default, all the tasks in the selected workflow will be checked. If you want the selected asset(s) to only take some of the tasks in the selected workflow, uncheck the tasks that you wish to exclude.



9. Click the Confirm button.

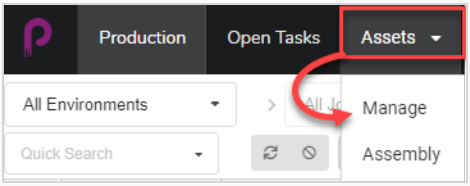
A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

Adding Tasks

When an asset is created with a workflow, all of that workflow's tasks are added to it by default. It is possible to remove specific tasks from an asset's workflow, as well as to add back tasks that were previously removed.

How to add asset tasks

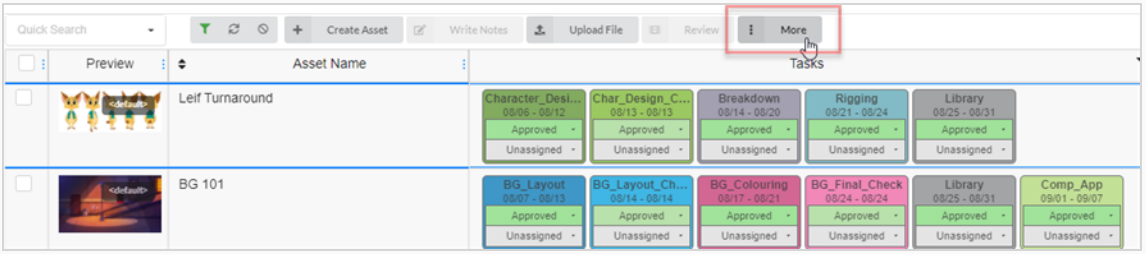
1. In the top menu, select **Assets > Manage**.



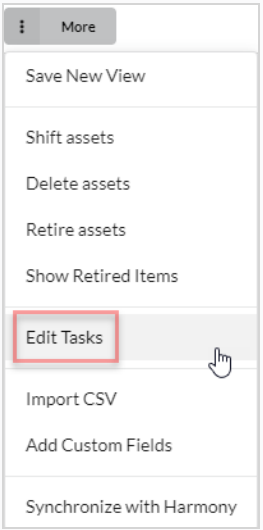
   The asset list opens.

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

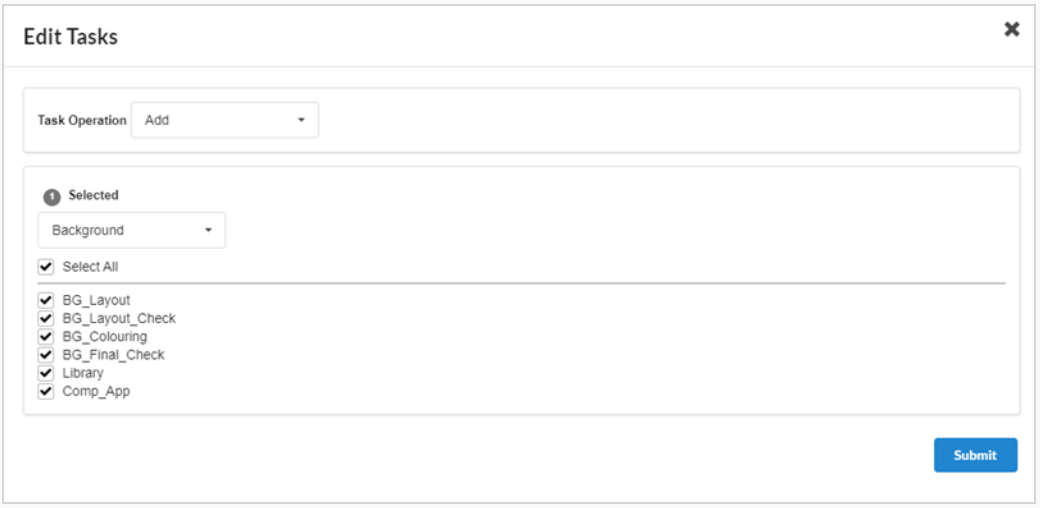
3. In the toolbar above the asset list, click on the **More** button.



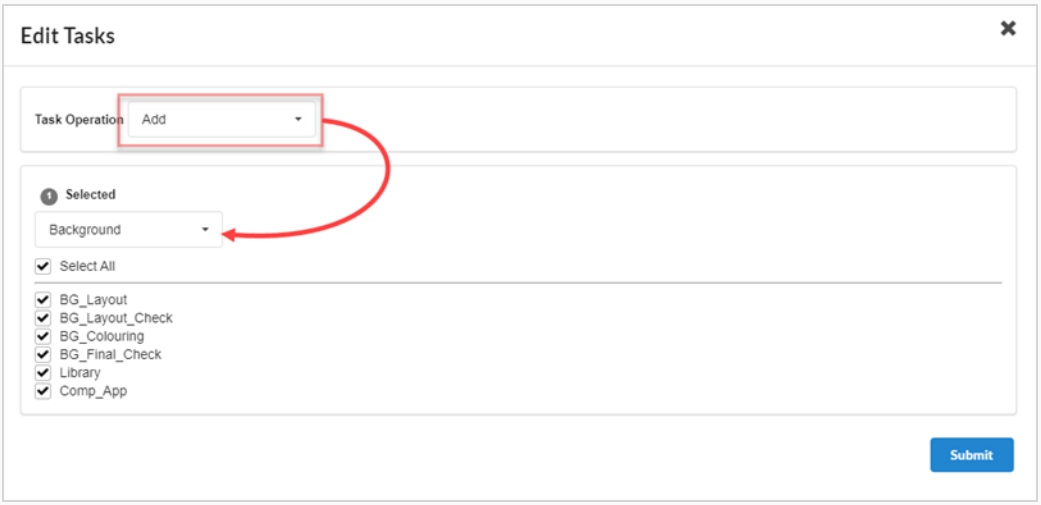
4. From the More drop-down menu, select **Edit Tasks**.



The Edit Tasks dialog box appears.



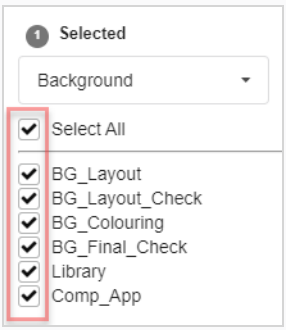
5. In the Task Operation drop-down menu, select **Add**.



6. In the Selected drop-down menu, select the workflow you wish to use.

> **NOTE**
>
> An asset can only have one workflow, and can only have tasks from its assigned workflow. If you select a different workflow than the one that is currently assigned to the asset, tasks from the asset's old workflow will be removed, unless a task with the same name exists in the new workflow.

7. Check the checkbox for each task you wish to add. If you want to add all of the selected workflow's tasks, check **Select All**.



8. Click the Confirm button.

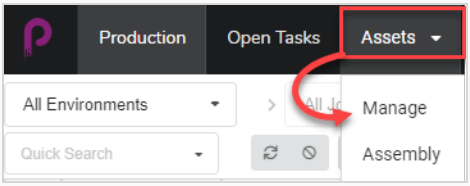
A toaster (pop-up) notification appears, indicating that the tasks for the selected items are being replaced. When the toaster notification disappears, tasks from old workflows have been removed from all the selected assets, and tasks from new workflow have been added.

Removing Tasks

When an asset is created with a workflow, all of that workflow's tasks are added to it by default. It is possible to remove specific tasks from an asset's workflow, as well as to add back tasks that were previously removed.

How to remove asset tasks

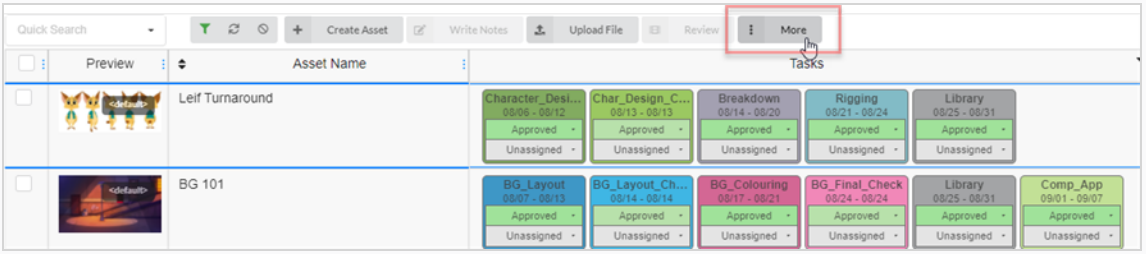
1. In the top menu, select **Assets > Manage**.



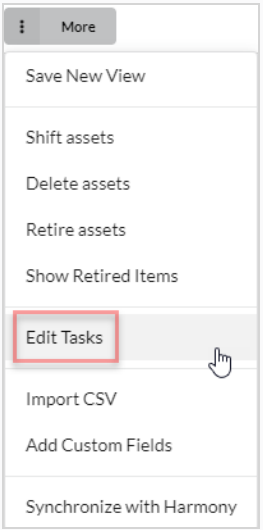
   The asset list opens.

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

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

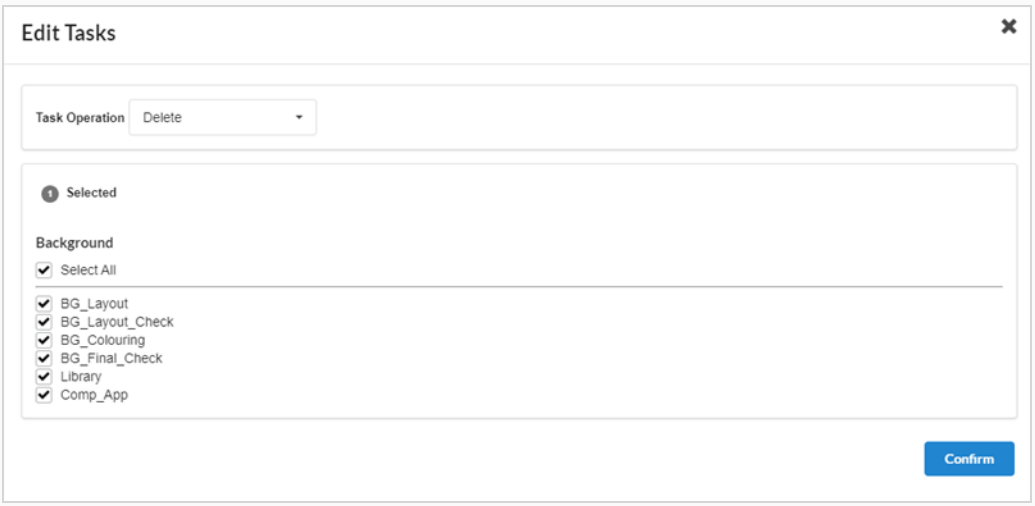


4. From the More drop-down menu, select **Edit Tasks**.



The Edit Tasks dialog box appears.

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



6. By default, all the tasks in the asset's workflow will be checked and marked for deletion. If you only want to delete some of the selected asset's tasks, uncheck all the tasks that you want to keep.
7. Click the Confirm button.

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

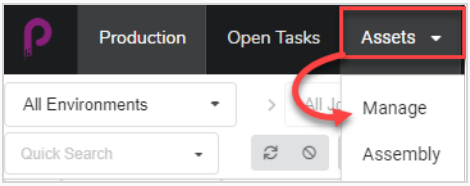
> **NOTE**
>
> You can add back the tasks that were removed from an assets workflow—see Adding Tasks .

Retiring Assets

When an asset is no longer needed, retiring it will hide it from view without deleting it. Retired assets can still be viewed and reactivated if needed—see Activating Retired Assets.

How to retire assets

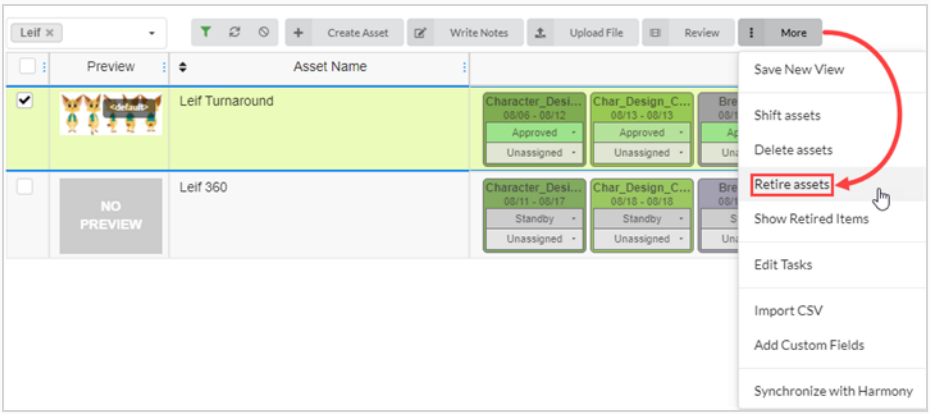
1. In the top menu, select **Assets > Manage**.



   The Asset list opens.

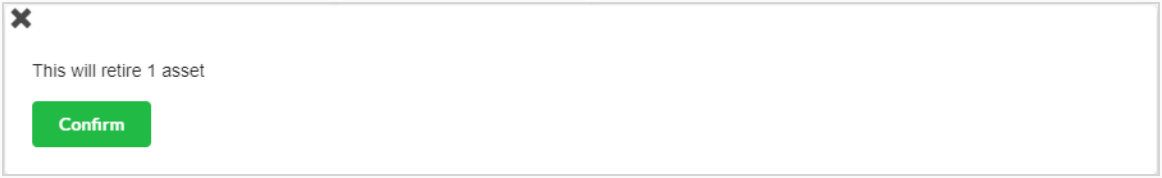
2. Click on the asset whose information you would like to view.
3. Enable the checkbox on the far left column of each asset for which you want to retire.

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



   The Confirm dialog box opens.

5. Select **Confirm**.



   The retired assets is now hidden from view.

Viewing Retired Assets

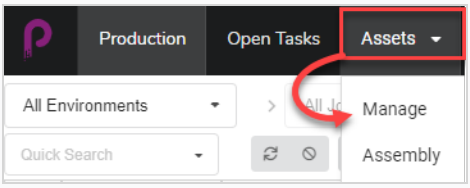
Assets that have been retired are hidden from the Production page, but can be viewed if needed.

NOTE

To retire assets, see Retiring Assets.

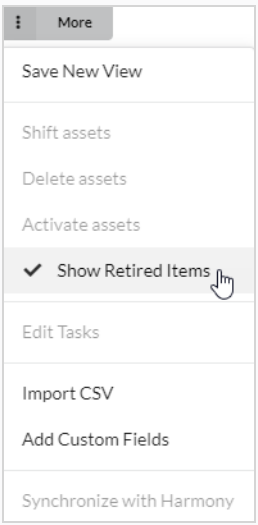
How to view retired assets

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

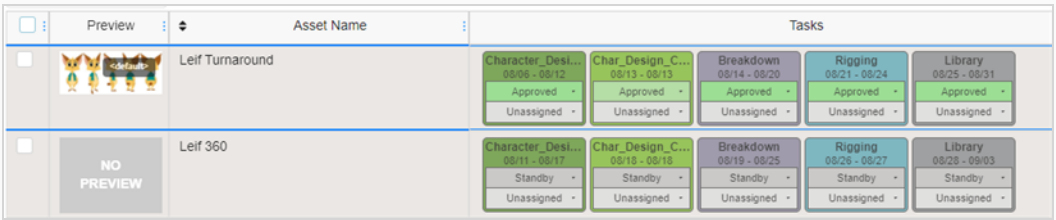


   The Asset list opens.

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



   Retired items appear.



NOTE

To hide retired assets, in the toolbar above the asset list, select **More**. A checkmark will be visible beside Show Retired Items. Select **Show Retired Items** to disable it.

The retired elements are now hidden from view.

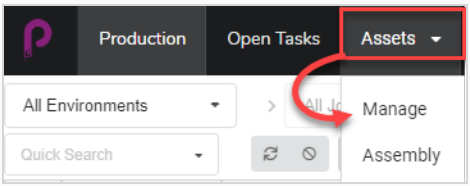
Activating Retired Assets

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

> **NOTE**
>
> To retire assets, see Retiring Assets.

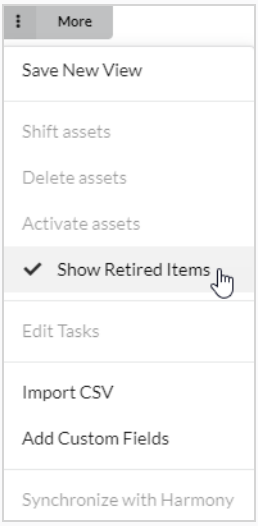
How to restore retired assets

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

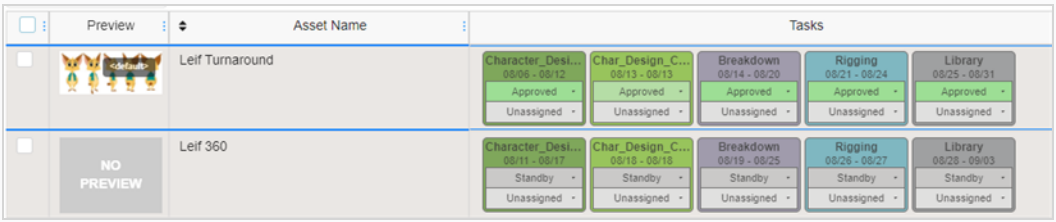


   The Asset list opens.

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

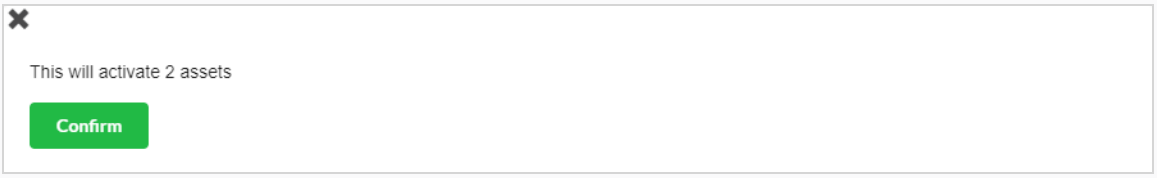


   Retired items appear.



3. Select the Assets you wish to Activate by using the check box to the far left of the screen.
4. Select **More > Activate Assets**.

5. In the confirmation prompt, click **Confirm**.



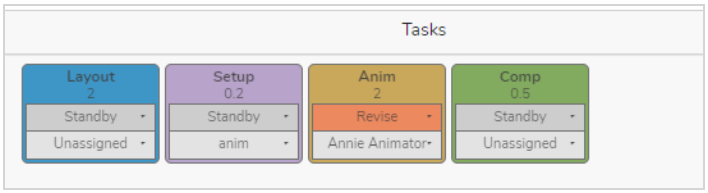
The retired assets are now visible in the asset list.

Chapter 6: Monitoring the Workload

Tasks are at the heart of tracking your production with Producer. They can can be automatically created when new scenes are added or they can be created manually. Tasks are the practical form of the processes that make up workflows.

Tasks have different possible statuses and can be assigned to different users.

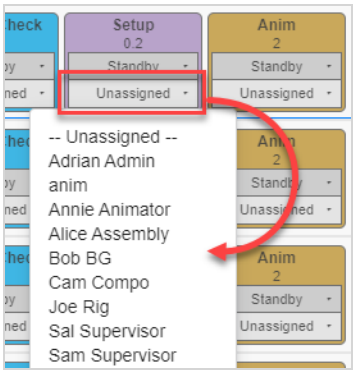
Tasks are usually created automatically because workflows have a default setting to automatically create tasks. When you create an item, such as a scene or an asset, and you select a workflow using the auto-create setting, all the processes of this workflow will be converted into actual tasks for this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



Assigning Tasks

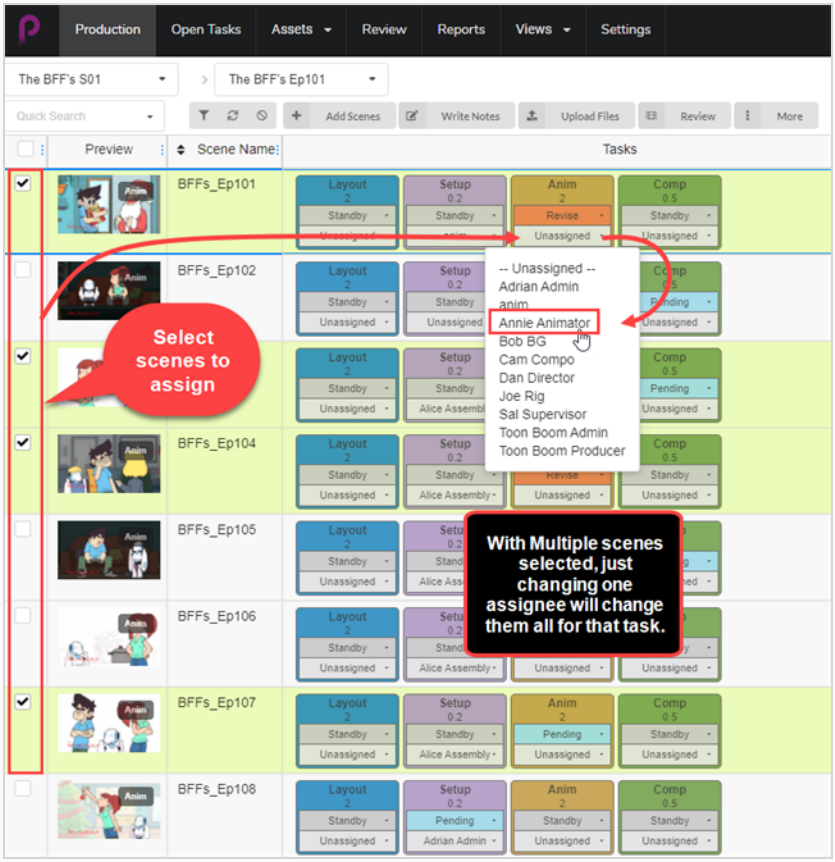
Each Task in any Workflow can be assigned to a specific user.

To assign multiple tasks to a particular user you can select one scene at a time and change to the required user or use the check boxes on the side of the screen and select the box of the designated scenes to be assigned. and in the Task in the Unassigned drop down menu select the appropriate user.



How to assign a task

1. In the top menu, select **Production** or **Assets > Manage**.
2. Select the environment and job containing the scenes to assign.
3. In the column corresponding to the task, in the Assigned drop-down menu (bottom), set the asset/task owner.
    - To assign multiple tasks at the same time, in the left-most column, enable the check box for all the scenes to assign and then assign the task owner.

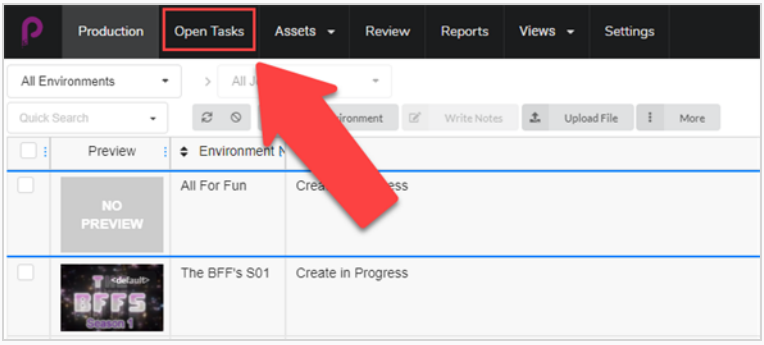

Production
Open Tasks
Assets
Review
Reports
Views
Settings
The BFF's S01
The BFF's Ep101
Quick Search
Add Scenes
Write Notes
Upload Files
Review
More
Preview
Scene Name
Tasks
BFFs_Ep101
BFFs_Ep102
BFFs_Ep104
BFFs_Ep105
BFFs_Ep106
BFFs_Ep107
BFFs_Ep108
Select scenes to assign
-- Unassigned --
Adrian Admin
anim
Annie Animator
Bob BG
Cam Compo
Dan Director
Joe Rig
Sal Supervisor
Toon Boom Admin
Toon Boom Producer
With Multiple scenes selected, just changing one assignee will change them all for that task.

Checking Open Tasks for Work and Notes

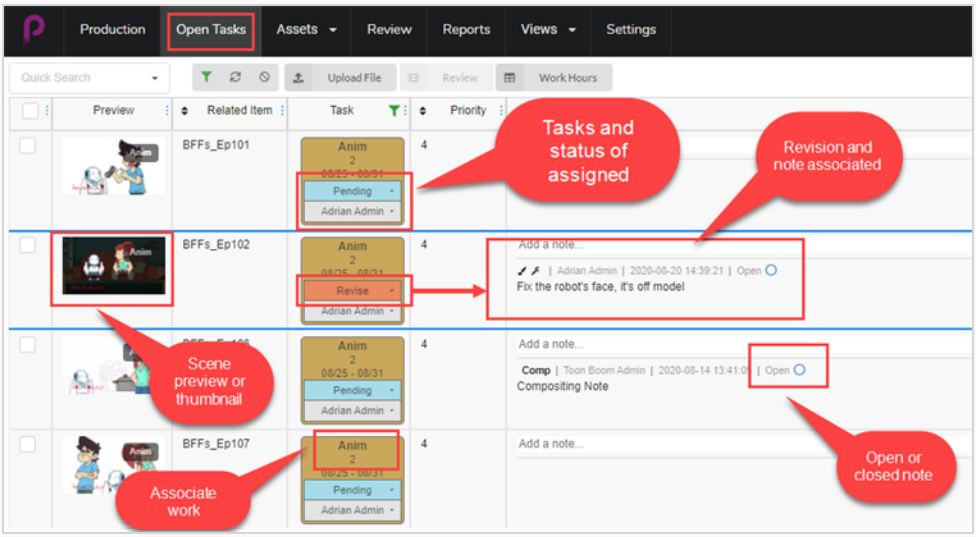
In Producer, every user receives their own unique login credentials. The individual users will have a predetermined limit of access to Producer depending on their duties within the animation pipeline. Every user will have the ability to check for Tasks and Notes that have been specifically assigned to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

How to check Open Tasks for work and notes

1. In the top menu, select **Open Tasks**.



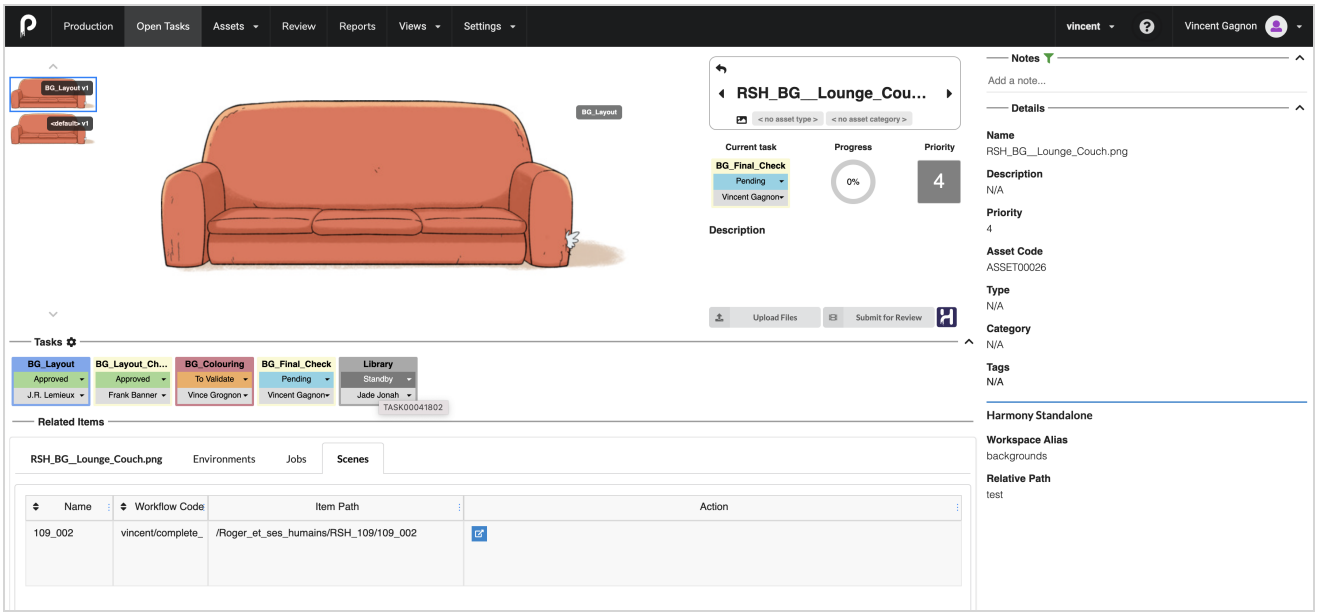
2. In the Open Tasks view, use the search toolbar to filter work and update tasks.



Open Tasks Focus View

This section provides the details related to any scene or asset so that one can focus on that given task without being distracted by the information of other open tasks.

To access the asset focus view, simply double click any asset from the list.



Associated Scene or Asset Focus View

In a Scene or Asset Focus View, double-clicking on a Related Items (or clicking on the open icon) brings that scene or asset Focus View.

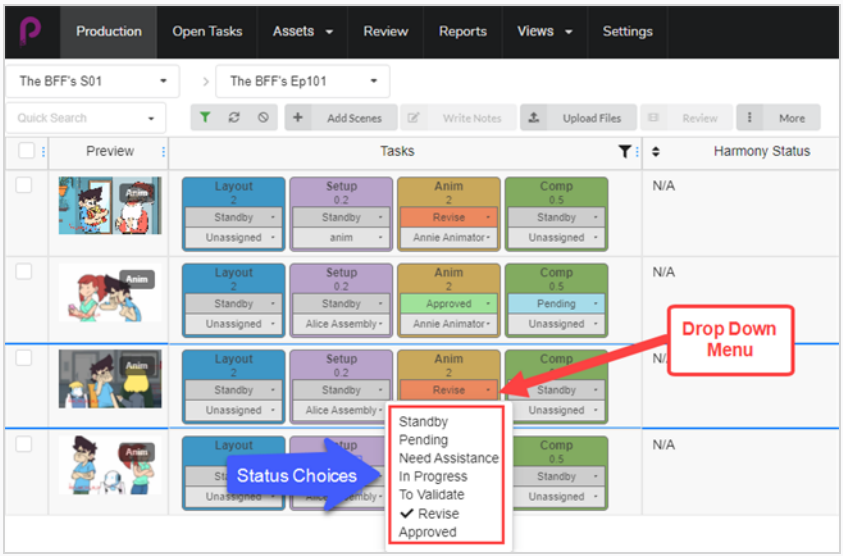
Updating Status Manually

In the Production, Open Tasks, and Assets views, you can set the status for various tasks.

How to update a status

1. In the top menu, select **Production**, **Open Tasks** or **Assets > Manage**.
2. Select the environment and job containing the status to update.
3. In the column corresponding to the task, in the Status drop-down menu (top), set the asset/task status.
    - To set multiple statuses at the same time, in the left-most column, enable the check box for all the scenes to update and then set the new status.

> **NOTE**
>
> You can change it depending on the workflow of the production and your need within that workflow. Depending on how the workflow is set up there could be some triggers involved with other statuses.



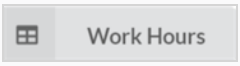
Logging Work Hours

Producer allows users to track work by hours. In the Open Tasks view, a user can log the hours worked on each task on specific dates.

How to log work hours

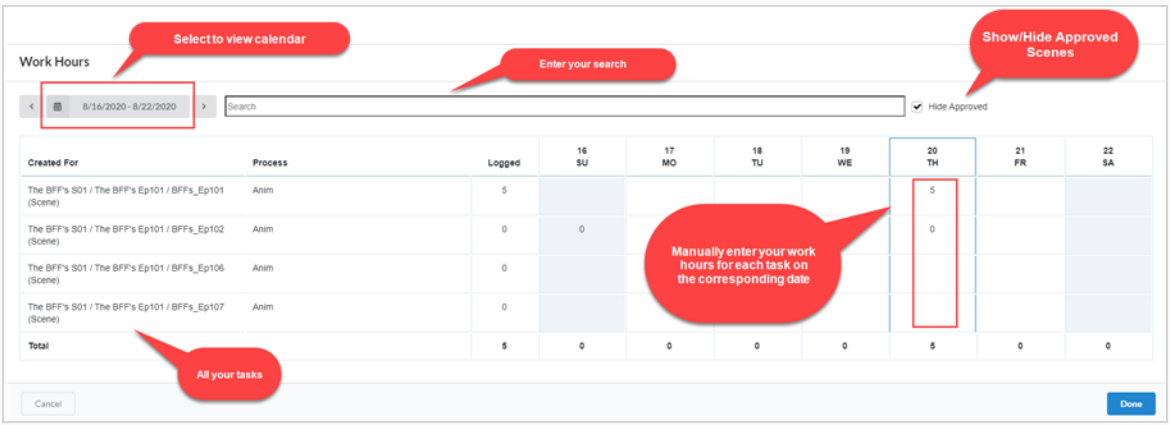
1. In Open Tasks, click on the **Work Hours** tab at the top of the task window.

   The Work Hours window opens.

2. Here you can select a number of options.

   - In the Date Range field, select the date range.
   - Use the Search toolbar to search for a particular task.
   - Enable or disable the Hide Approved option to hide all approved work.
   - For each task, enter the number of hours worked in the corresponding day field.

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

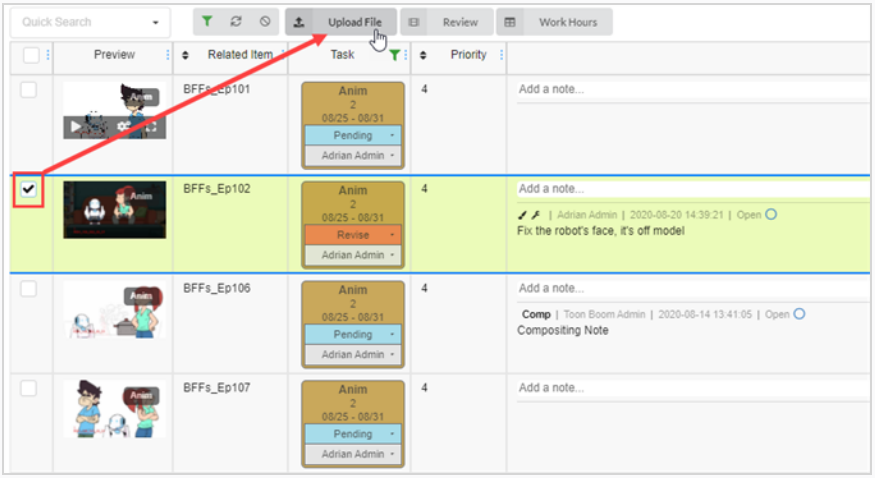
Uploading and Updating Snapshots

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

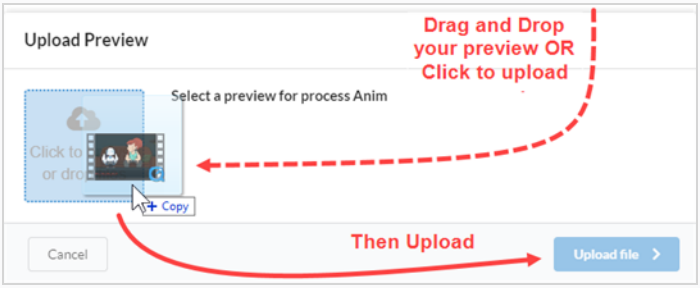
If Producer is integrated with Harmony, you can push the asset snapshot automatically from Harmony using a script.

How to upload a snapshot manually

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



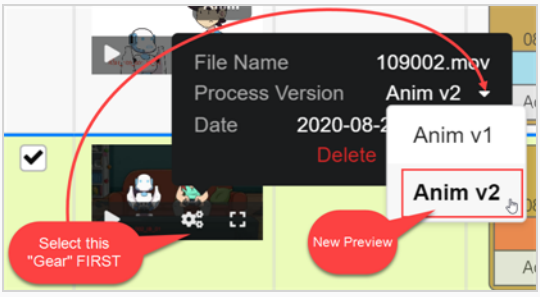
The Upload Preview window opens.



3. In the Upload Preview window, you can either drag and drop your new preview or click and upload it.
4. Select **Upload**.
5. In the Image area, select the Gear icon that appears when you hover your mouse over the window.

   A new window opens.

6. Here you can view the old preview and the new one. Producer automatically makes the latest upload the default preview.

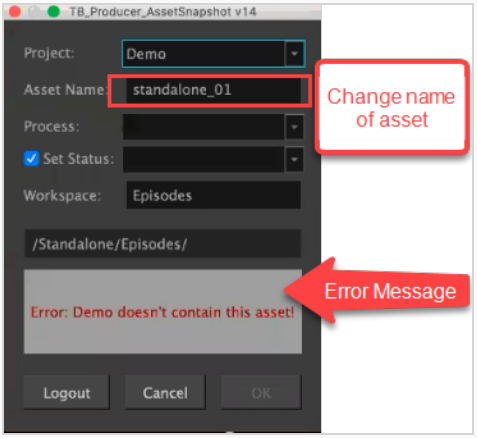


How to upload an Asset snapshot from a Harmony scene

1. In Harmony, select the Asset Snapshot script within the asset scene you wish to upload.

   A new window opens.

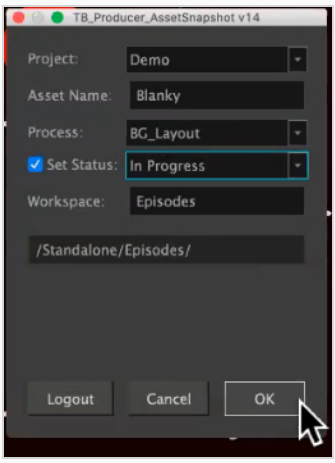
2. The window may display an error at first because it associates the scene name as an asset. Enter in proper asset name.



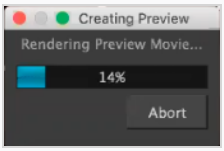
   Harmony then communicates with Producer to recognize the Process you have in place.

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

4. Click OK.

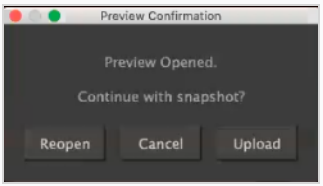


A new window will open showing the progress in Rendering Preview.

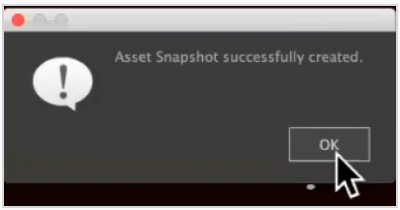


The Preview Confirmation dialog box opens.

5. Select **Upload**.

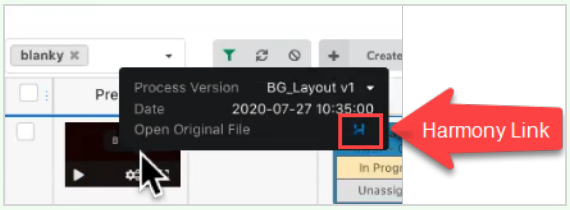


A confirmation window opens.



NOTE

If you view your asset in Producer, they will have a Harmony icon in the preview window linking directly to the original Harmony file.

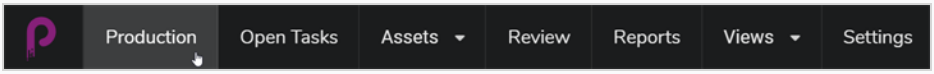


Verifying a User's Workload

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

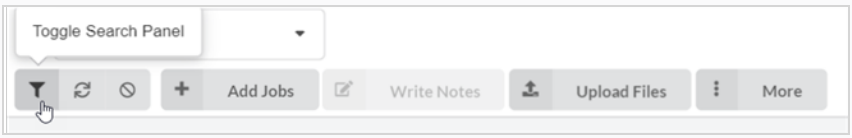
How to filter the production table

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

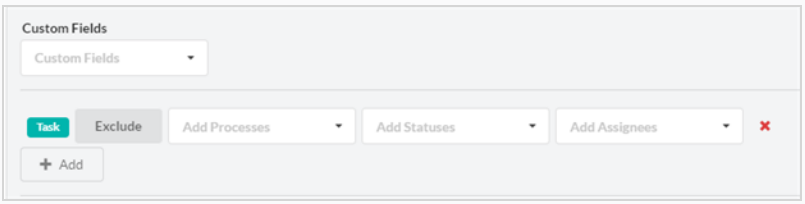


   The Production page opens.

2. Select the Environment for which you want to see the workload and assignments.
3. Click on the Toggle Search Panel button at the top.

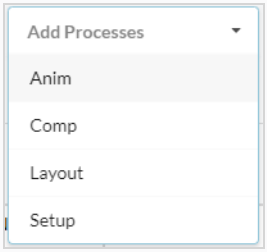


   The Custom Fields window opens.

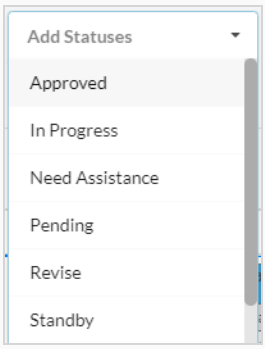


4. Click the Add + option to add more custom fields as well as use the existing fields to Exclude any of the selections.

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

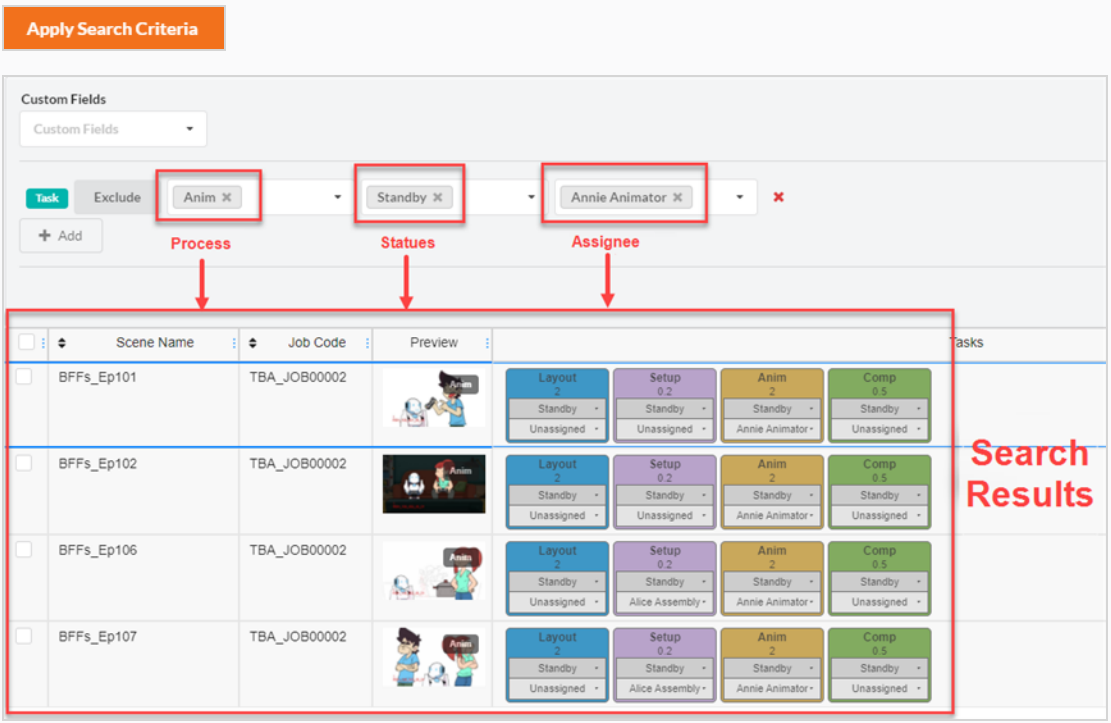


   - In the Add Statues, depending on the workflow you selected you get a drop down window similar to this:

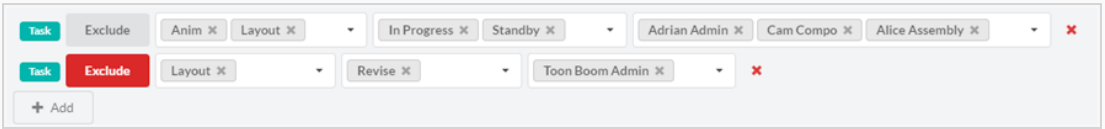


- And in the final drop-down, Add Assignees, it is limited to the users assigned for this particular production.

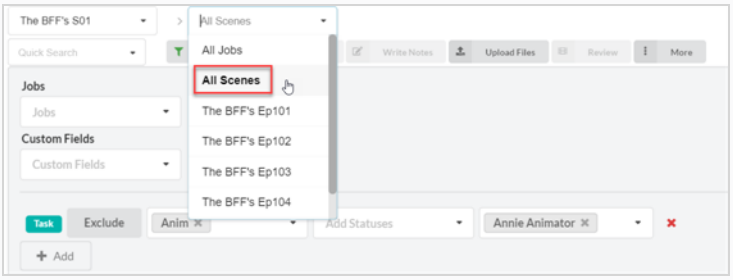
5. When ready, select **Apply Search Criteria** in the bottom right corner of the window.



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



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

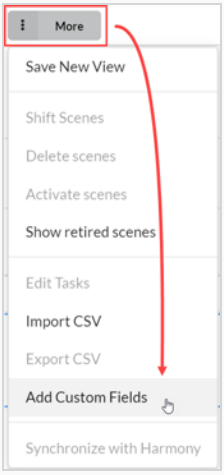


Creating Custom Fields

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

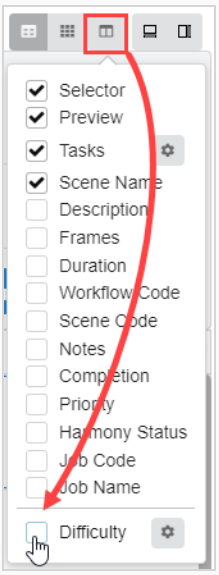
How to create custom fields

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

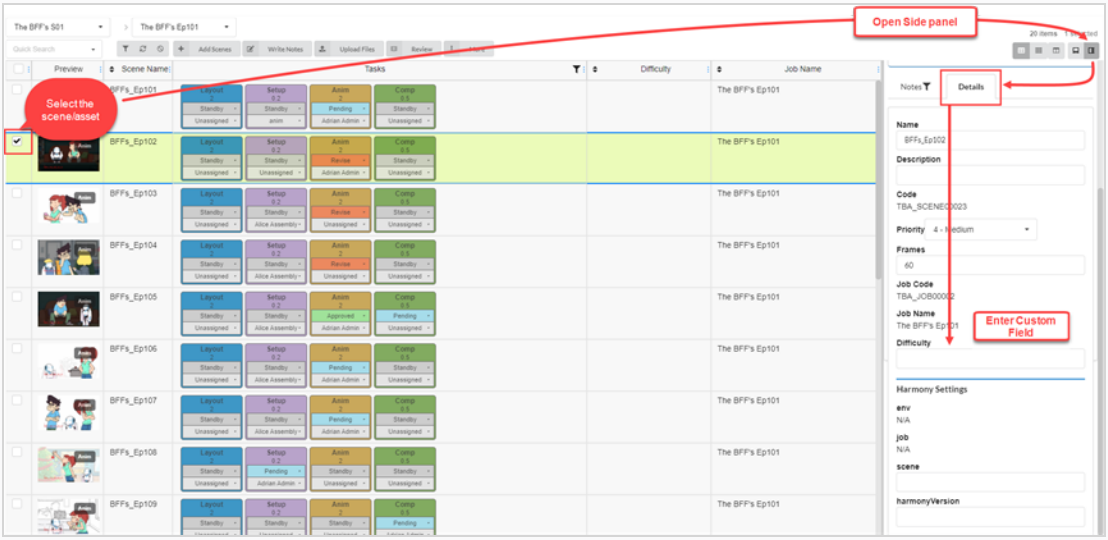


   The Add a Custom Field window opens.

2. In the Name field, enter the name of the new custom field.
3. In the Description field, you can add an optional Description.
4. Click **Create**.
5. Open the Field Selector, and check the new custom field.



6. To modify the new custom field, select the scene or asset for which you wish to edit the custom field value.
7. Open a side panel and select **Details > your custom field**.



Your entry now appears in the custom field.

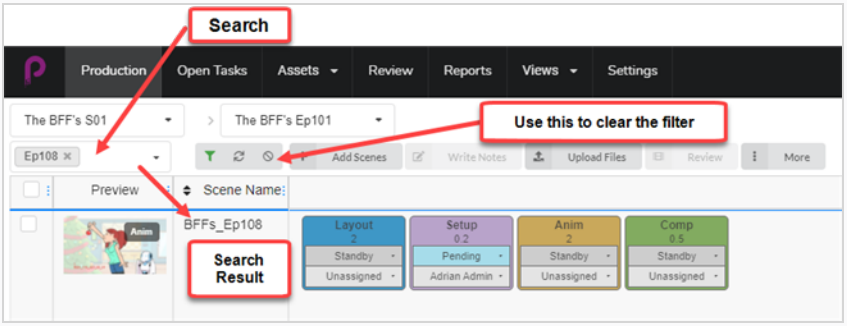
> **NOTE**
>
> Everyone in the production will be able to view the custom field. Only certain users will have the ability to add them.

Searching in Producer

In Producer there is a Quick Search located in the Production, Open Task, Assets and Review views. This can be used to quickly find a environment, scene, asset, or numerous other items.

How to search in Producer

1. In the Quick Search field, type a keyword to filter the production table.
2. When done, beside the search field, click the Clear Filter button.



Chapter 7: CSV Import and Export

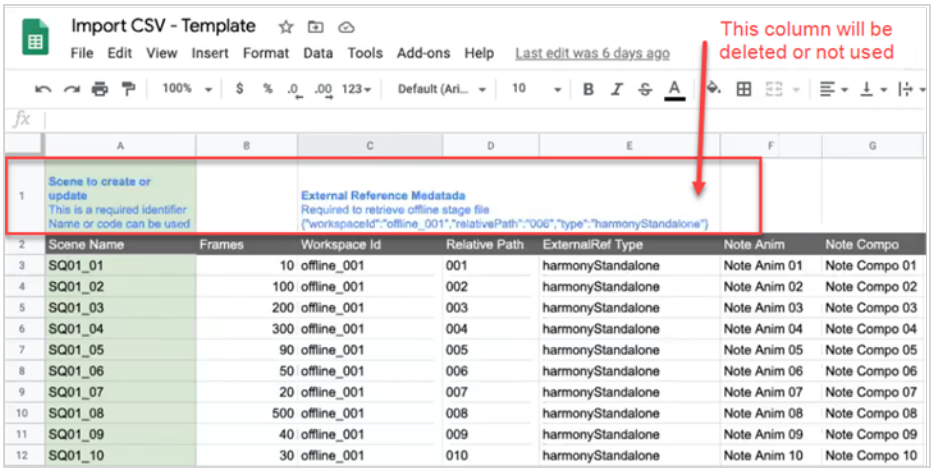
Import CSV files in Toon Boom Producer to automatically create empty assets, scenes, jobs, and environments and populate additional fields such as Description, Name, and, Note.

Export CSV files from Toon Boom Producer to gather information such as asset lists and details.

Creating a CSV File

Before creating your CSV file, review the notes below:

- When creating the data in the spreadsheet application, set numbers with padding as Text format to preserve the preceding zeros.



	Scene Name	Frames	Workspace Id	Relative Path	ExternalRef Type	Note Anim	Note Compo
3	SQ01_01	10	offline_001	001	harmonyStandalone	Note Anim 01	Note Compo 01
4	SQ01_02	100	offline_001	002	harmonyStandalone	Note Anim 02	Note Compo 02
5	SQ01_03	200	offline_001	003	harmonyStandalone	Note Anim 03	Note Compo 03
6	SQ01_04	300	offline_001	004	harmonyStandalone	Note Anim 04	Note Compo 04
7	SQ01_05	90	offline_001	005	harmonyStandalone	Note Anim 05	Note Compo 05
8	SQ01_06	50	offline_001	006	harmonyStandalone	Note Anim 06	Note Compo 06
9	SQ01_07	20	offline_001	007	harmonyStandalone	Note Anim 07	Note Compo 07
10	SQ01_08	500	offline_001	008	harmonyStandalone	Note Anim 08	Note Compo 08
11	SQ01_09	40	offline_001	009	harmonyStandalone	Note Anim 09	Note Compo 09
12	SQ01_10	30	offline_001	010	harmonyStandalone	Note Anim 10	Note Compo 10

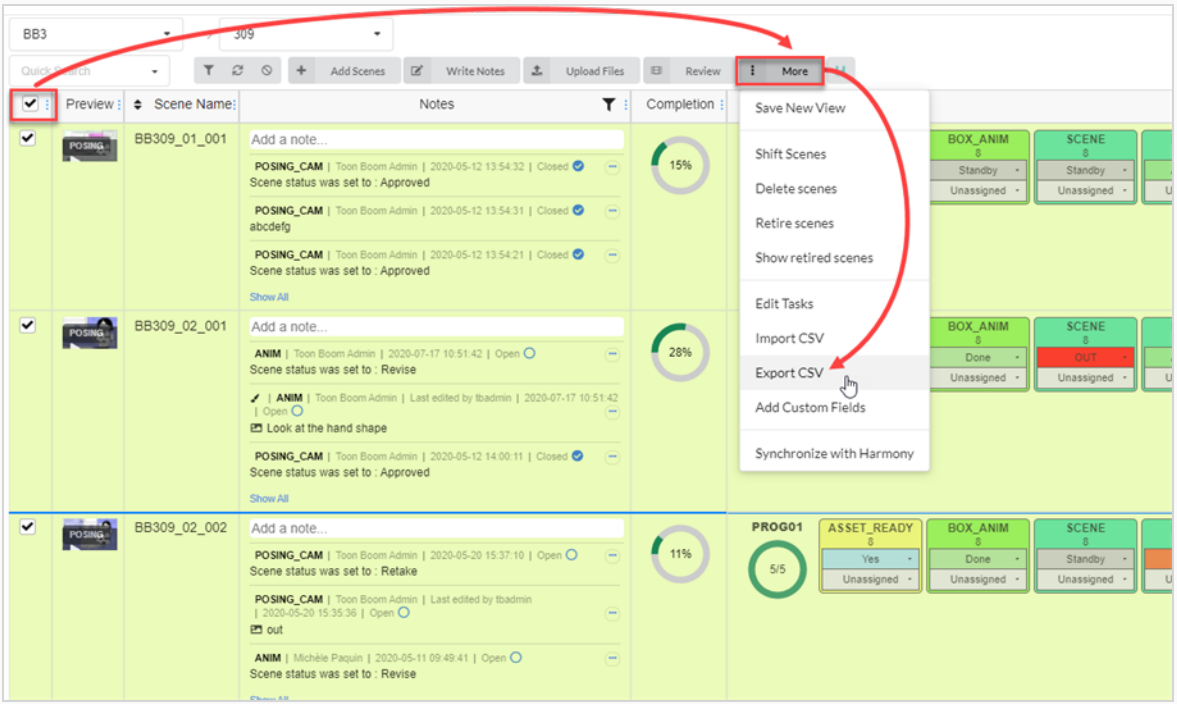
- You are responsible to avoid doubling the asset and scene names in your spreadsheet. Producer will not accept duplicate names and will suggest skipping the problematic entries.
- 2-bit characters and special characters can be imported via CSV file upload only. It will not work by copying and pasting data directly in the Producer Import CSV dialog box.
- Create your CSV file as a UTF-8 format (8-bit Unicode Transformation Format) to support special characters.
- When creating a sample header row for your columns, use the exact Producer column name to automatically match the data. You will be able to reassign the columns directly in Producer before completing the import process. Use name in lowercase for the scene or job name to be assigned to the Name column.
- To create scenes, you need to add a column containing the matching Job code. For more information, see Displaying the Environment and Job Codes.
- To create jobs, you need to add a column containing the matching Environment code. For more information, see Displaying the Environment and Job Codes.

Exporting CSV File

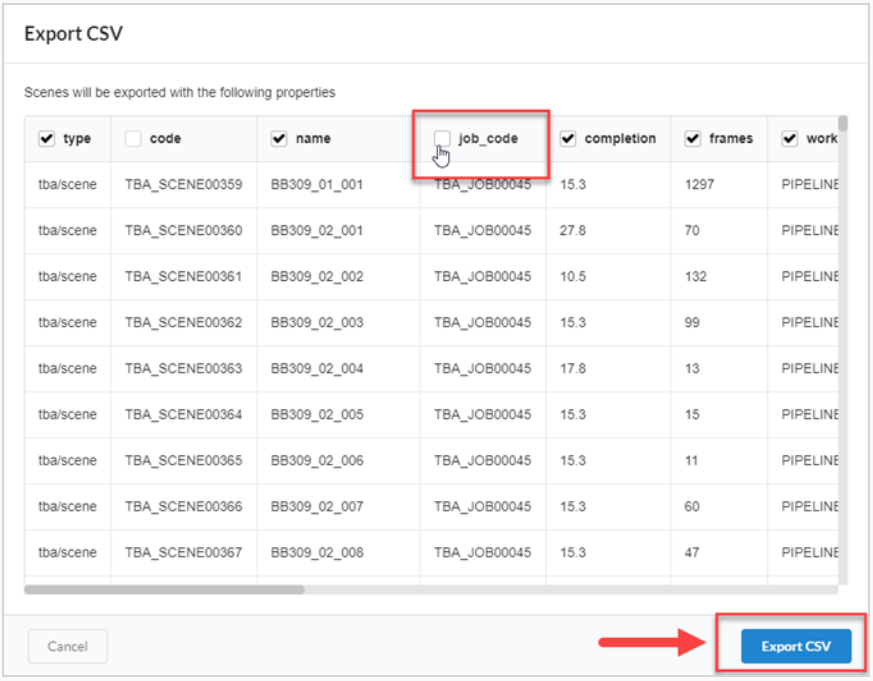
Producer allows you to export/import data through CSV files.

How to export a csv file

1. In the main menu, select **Production**.
2. From the Environment and Job drop-down menus, select an environment and job.
3. In the list of scenes, select one or several scenes from which you would like to export notes by checking their respective checkbox.
4. In the Production tab toolbar, select **More > Export CSV**.



The Export CSV window appears.



5. Check or uncheck the column checkboxes to select which categories you would like to appear in your exported CSV file.
6. Click **Export CSV**.

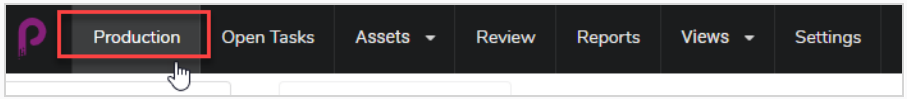
   A CSV file automatically downloads.

Displaying the Environment and Job Codes

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

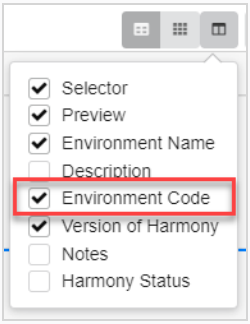
How to display the Environment code:

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

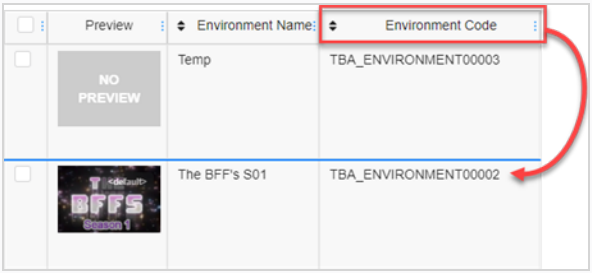


2. Use the Environments drop-down menu, under the main menu, to navigate to an environment list.
3. In the Production toolbar, click on the Column Manager icon.

4. In the Column Manager, enable the **Environment Code** column.

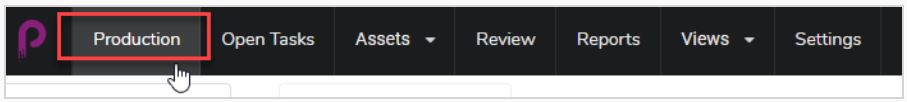


The Environment Code column appears in the list of environments.



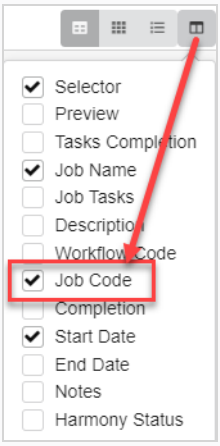
How to display the Job code:

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

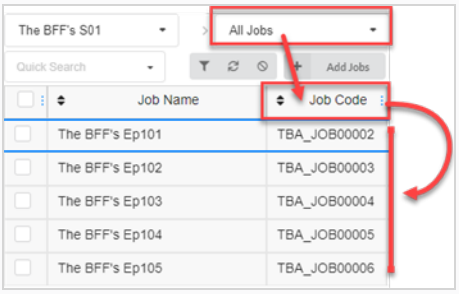


2. Use the Job drop-down menu, under the main menu, to navigate to a job list.
3. In the Production toolbar, click on the Column Manager icon.

4. In the Column Manager, enable the **Job Code** column.



The Job Code column appears in the list of jobs.

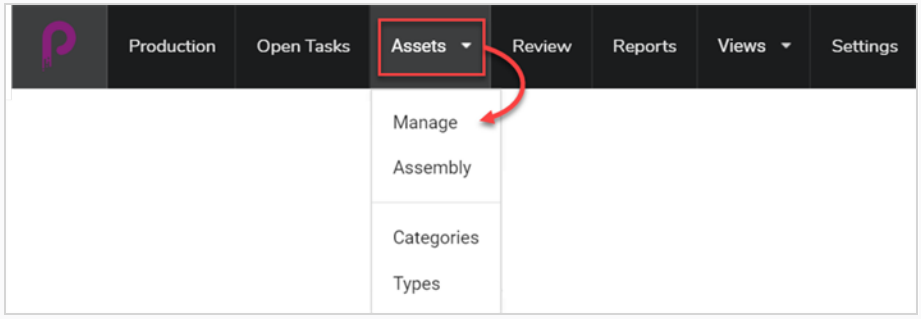


Uploading a CSV File and Copy/Pasting Data

When your data is ready, you can import it in Producer. You can also copy and paste your data directly from your spreadsheet to the Producer Import CSV dialog box without creating a CSV.

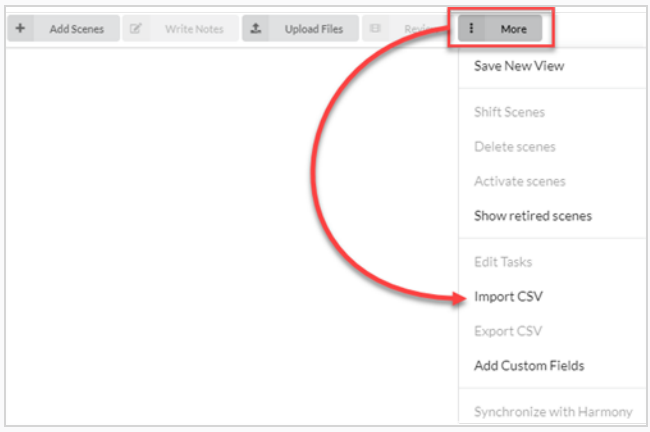
How to upload a CSV file or copy data from a CSV file:

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

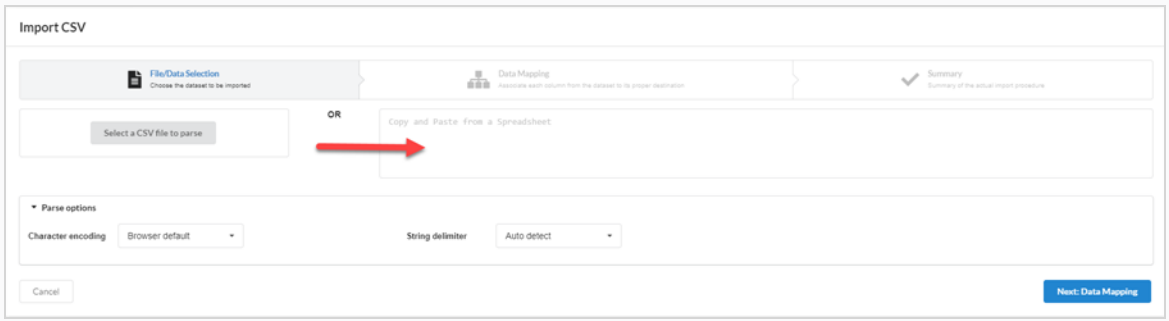


   Or navigate to the Environment, then to the Job where you want to create items from your CSV data.

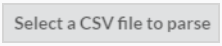
2. Click on the **More** tab and select **Import CSV.**



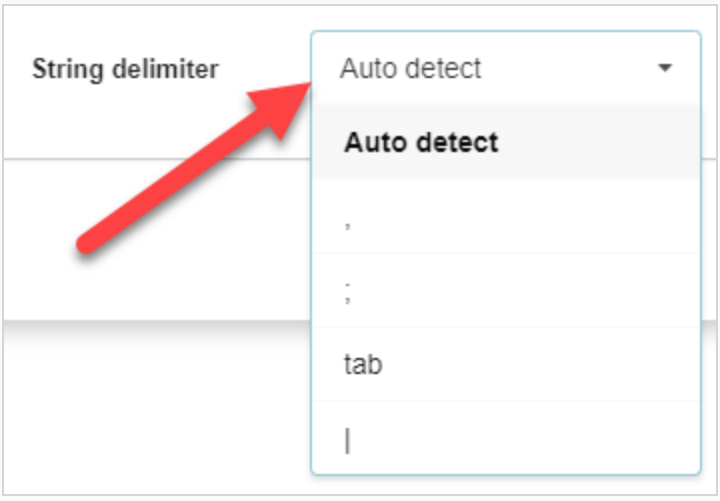
   The Import CSV dialog box opens.



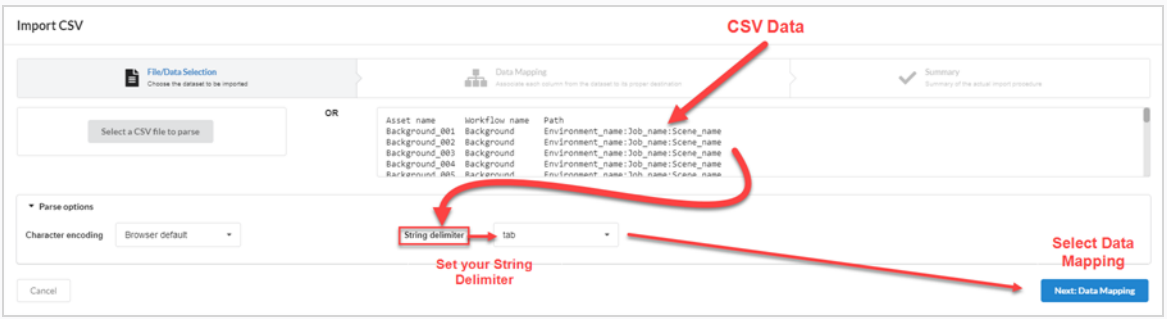
3. In the Import CSV dialog box (if a CSV is already created), click on the Select a CSV file to parse button and browse for your CSV file. Alternatively, you can paste it into the Copy and Paste from a Spreadsheet area.



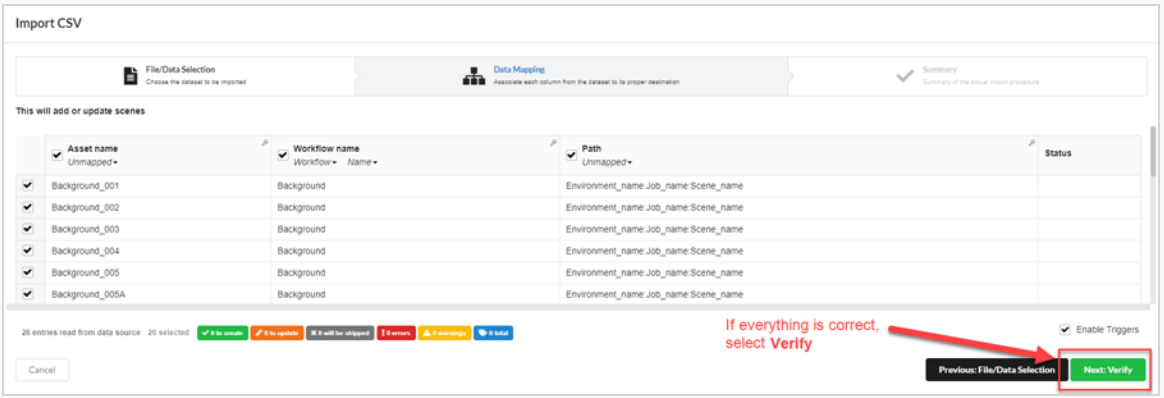
4. Set up your String Delimiter to **Auto detect**.



5. Click on the **Next: Data Mapping** button.

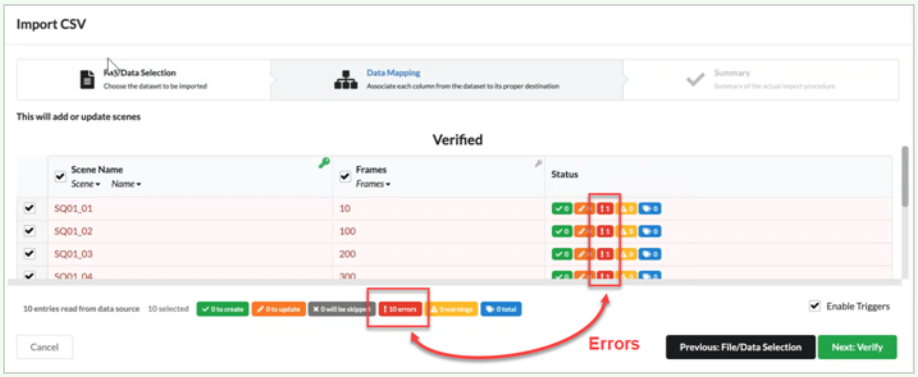


6. Click on the **Next: Verify** button.



NOTE

If the CSV file format doesn't match the default value, Producer will display a warning.



Chapter 8: Assembly

Assembly is the process of associating assets with environments, jobs and scenes that require those assets so as to track which assets must be completed before work on these environments, jobs and scenes can begin. An asset can be assembled with as many environments, scenes and jobs as needed, and environments, jobs and scenes can be assembled to as many assets as needed.

Whether you associate an asset with a scene, job or environment can depend on how much it is used. For example:

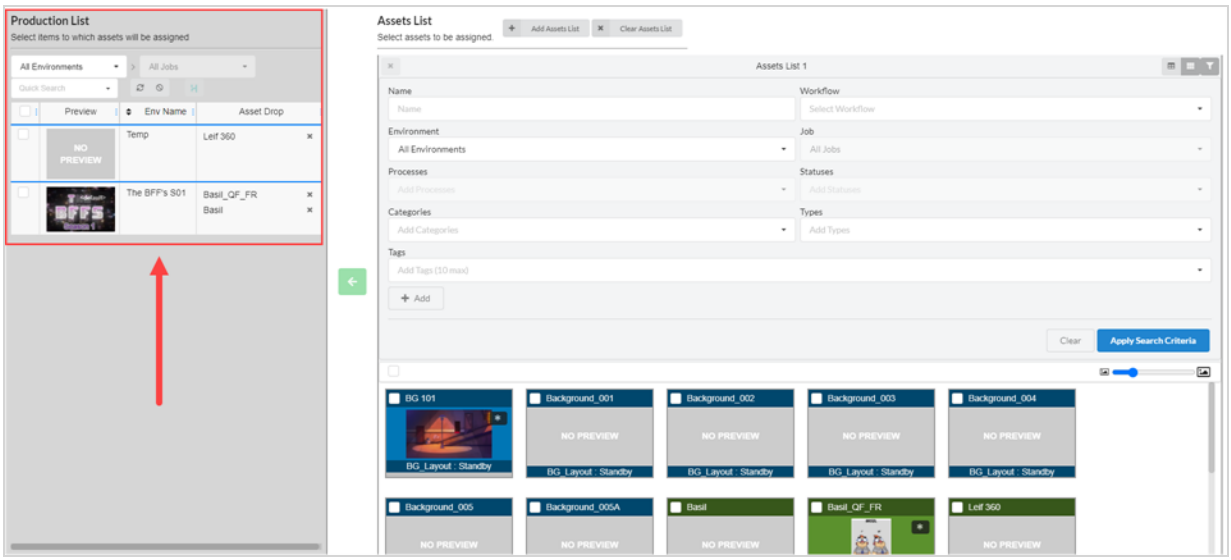
- If an asset will only be used in one or a couple scenes in an episode, it makes sense to assemble it with each scene in which it is used.
- If an asset is to be used throughout one or a few episodes, it makes sense to assemble it with each job representing each episode in which it is used.
- If an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

Assets that have been assigned to scenes can be viewed from the Production page. In the Job Tasks column for a given scene, the progress process wheel will display the number of assets assigned to it in the centre, and the completion percentage in the wheel.

The Assembly page also allows you to search and filter assets.

Navigating and Searching the Production List

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



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

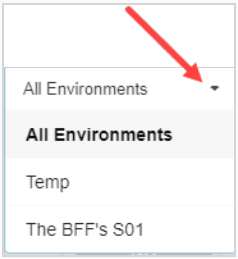
How to search the production list

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

   The Assembly page opens and the Production List panel appears to the left.

2. In the Production List panel, navigate to the production item with which you want to assemble assets:

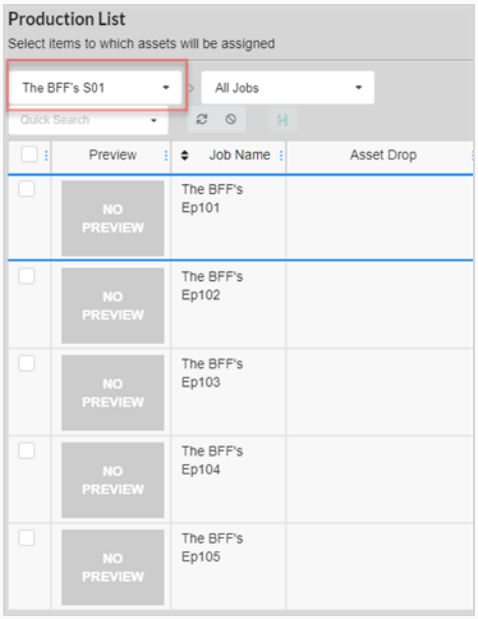
3. To assemble assets to an environment, in the environments drop-down in the Production List panel, select **All Environments**.

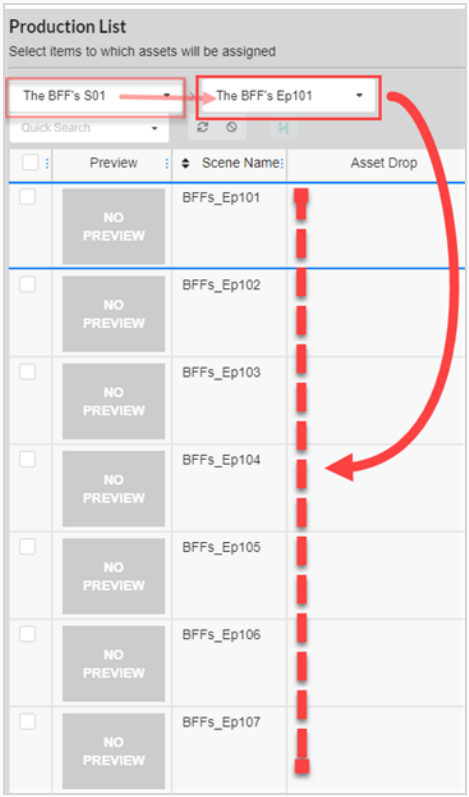
4. To assemble assets to a job, in the environments drop-down menu, select the environment containing the job you want to assemble assets with.

5. To assemble assets to a scene:

    - in the environments drop-down menu, select the environment containing the scene you want to assemble assets with.



    - In the Job drop-down menu, select the job containing the scene you want to assemble assets with.



6. To filter the listed items based on keywords, in the Quick Search text box, type in all or part of the name of the environment, job or scene you want to find. Then hit the Enter key to add what you typed to your search terms.

   Only items containing your search term appear in the list.

   > **NOTE**
   >
   > You can repeat this step to add several search terms. Only items containing all of your search terms in their name will appear in the list.
   >
   > You can remove a search term by clicking on the Close icon in the search terms box. You can also press Backspace to delete the last search term.

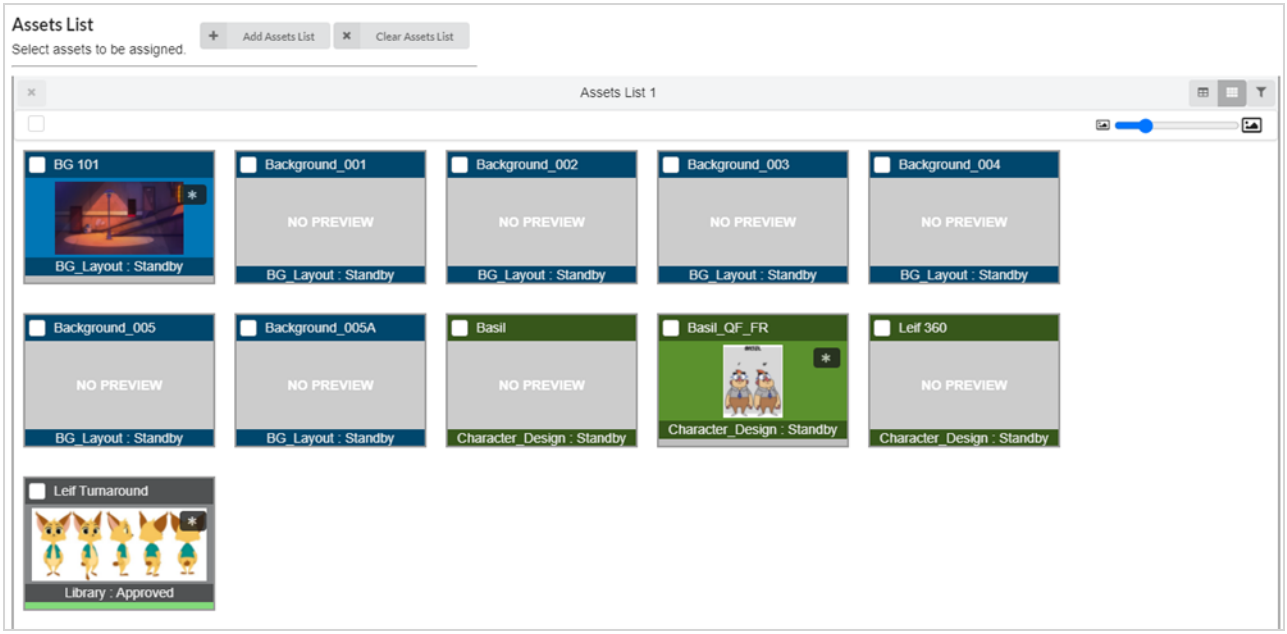
7. To list all items again, do one of the following:

   - Click the Remove icon on all search terms in the text box or hit the Clear all filters button.
   - Press the Backspace key to remove the last search term until all the search terms have been erased.

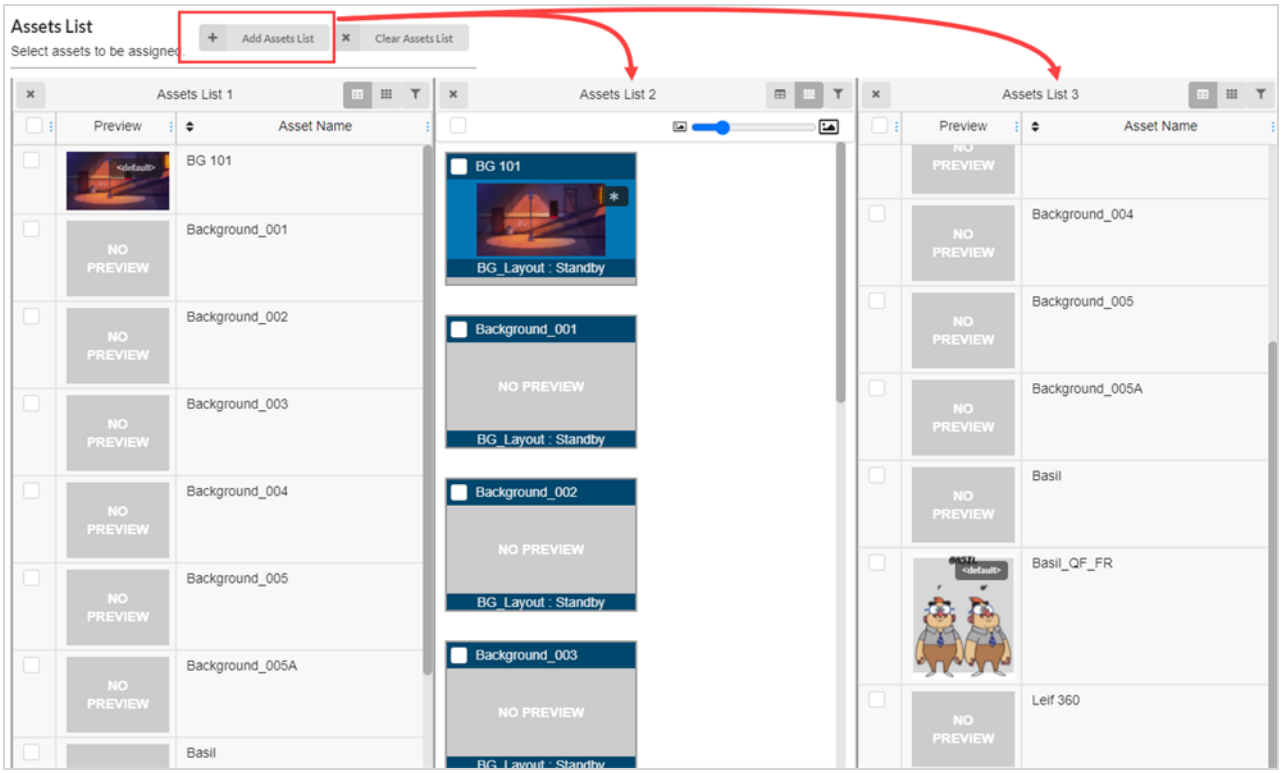
Browsing and Finding Assets

The second step to assembling assets with environments, jobs or scenes in your production is to find the assets you want to associate to the items in the Production List.

When you open the Assembly page, the list of all the assets for your project is displayed in the right area, in a panel labelled Assets List. If you don't have a lot of assets, you can simply scroll through your assets and find the assets you want to assemble. Otherwise, you can use the extensive set of search and display options to find the right assets.



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

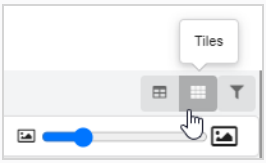


How to change the size of thumbnails in the assets list

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

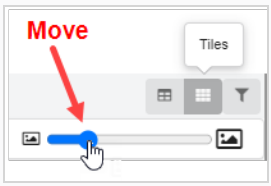
   The Assembly page opens. The Asset List panel appears to the right.

2. Ensure the Asset List is in tile mode by clicking the Tiles icon.



3. To change the size of the assets:

4. Click and hold the icon in the middle of the slider, then drag it to the left to make the icons smaller, or right to make the icons larger.



How to change the display mode of the assets list

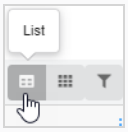
1. In the top menu, select **Assets > Assembly**.

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

2. Do one of the following:

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

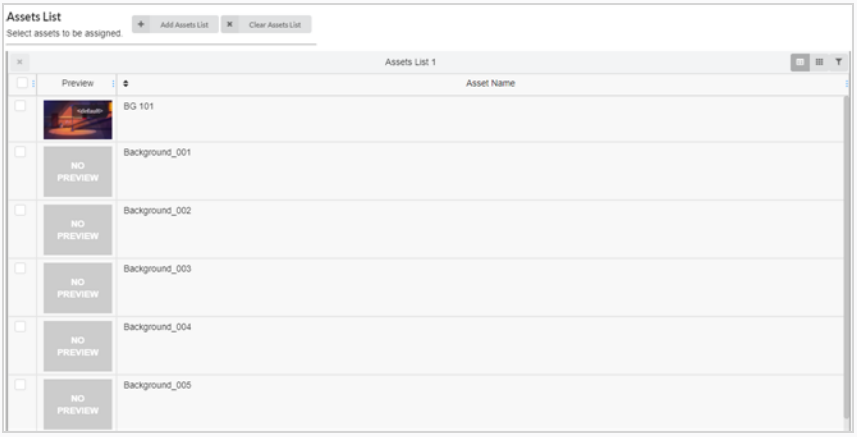
   - To view the Asset List in list mode, click **List**.

How to filter assets in the assets list

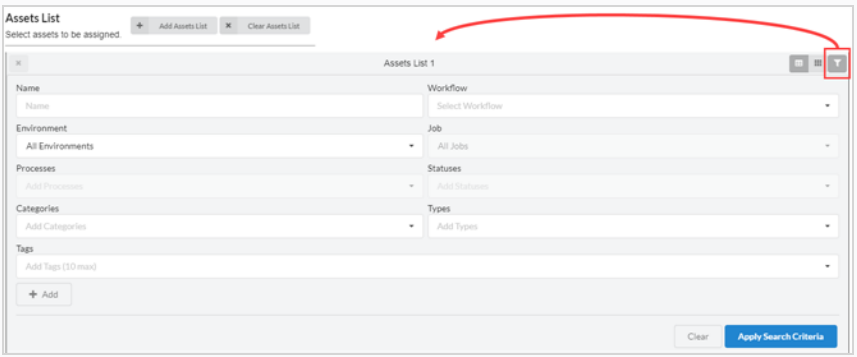
1. In the top menu, select **Assets > Assembly**.

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

2. In the top-right corner of the Assets List panel click the Toggle Search Panel icon.

   The search panel appears below the toolbar.



3. Do one or several of the following to filter the list of assets to the assets you want to assemble:
    - In the Name field, type in the name, or part of the name, of the asset you are searching for.
    - In the Workflow drop-down menu, select the workflow associated with the asset you are searching for.
    - If the asset you are searching for was already assembled with an environment, in the Environments drop-down menu, select the environment the asset you are searching for is associated with.
    - If the asset you are searching for was already assembled with a job, in the Jobs drop-down menu, select the job for the asset you want to search for.
    - If the asset you are searching for was assigned a specific process, in the Process field, select the process assigned to the asset you are searching for.
    - In the Statuses field, select the status for the asset you want to search for.
    - In the Categories field, select the category for the asset you are searching for.
    - In the Types field, select the type for the asset you want to search for.
4. Click Apply Search Criteria at the bottom of the search toolbar.

    The assets that match your criteria appear in the list of jobs.
5. To display all assets again, click the **Clear** button at the bottom of the search panel.

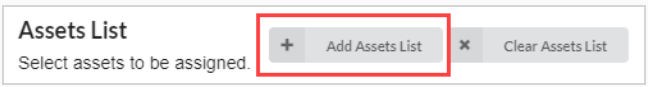
    All of the assets are now displayed in the asset list.

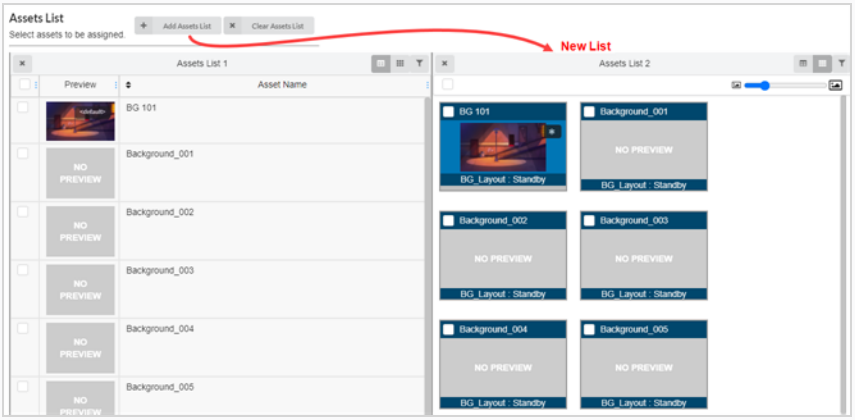
How to add an assets list

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

    The Assembly page opens. The Asset List panel appears to the right.
2. At the top of the Asset List, select **Add Assets List**.

    An additional asset list appears on the right.





3. To rename an asset list, click anywhere at the top of the list around the current name.

   The text box can now be edited.

4. Type in a new name for the asset list in the text box, then click anywhere outside of the text box.

   The asset list has now been renamed.

How to remove an assets list

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

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

2. If there is more than one asset list, click on the Remove ✖ icon to the top left of the asset list you wish to remove.

   The asset list has now been removed.

How to remove all extra assets list and reset the first assets list

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

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

2. If there is more than one asset list, select **Clear Assets Lists** at the top of the Asset List page.

   All but the original asset list are removed.

Assembling

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

How to assemble one asset at a time

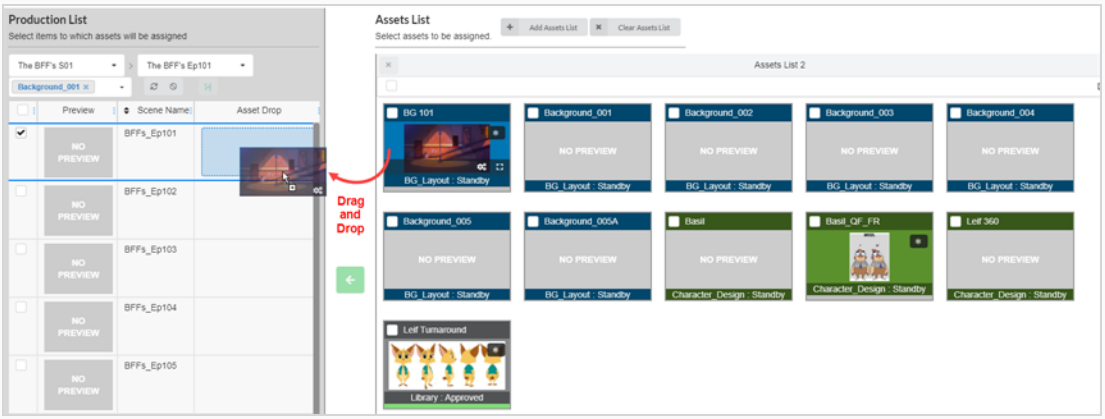
1. In the top menu, select **Assets > Assembly**.

   The Asset List opens.

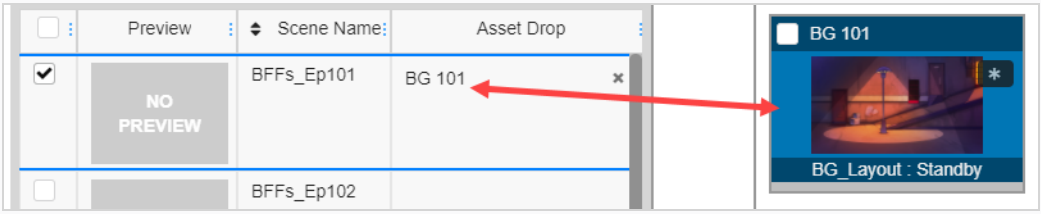
2. Locate the environment/s, job/s, or scene/s you want to associate the asset to from the production List—see Searching Production List.

3. Locate the asset you want to associate to an environment, scene or job from the Assets List.

4. Click the asset you wish to assign, and drag it over to the Asset Drop column to the item you wish to assign it to.



   The asset is now listed in the Asset Drop column.



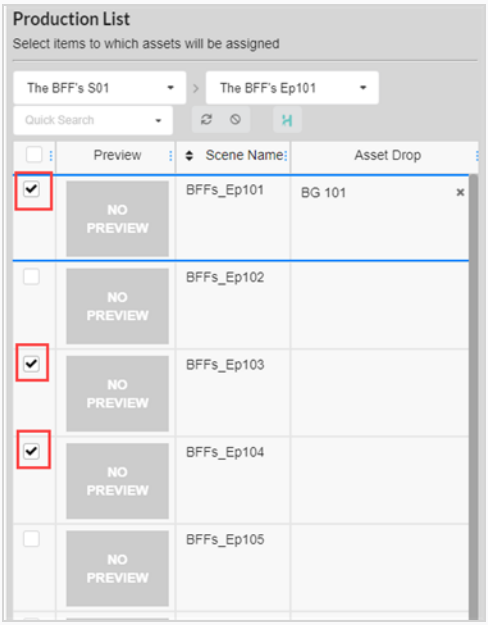
How to assemble multiple assets at once

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

   The Asset List opens.

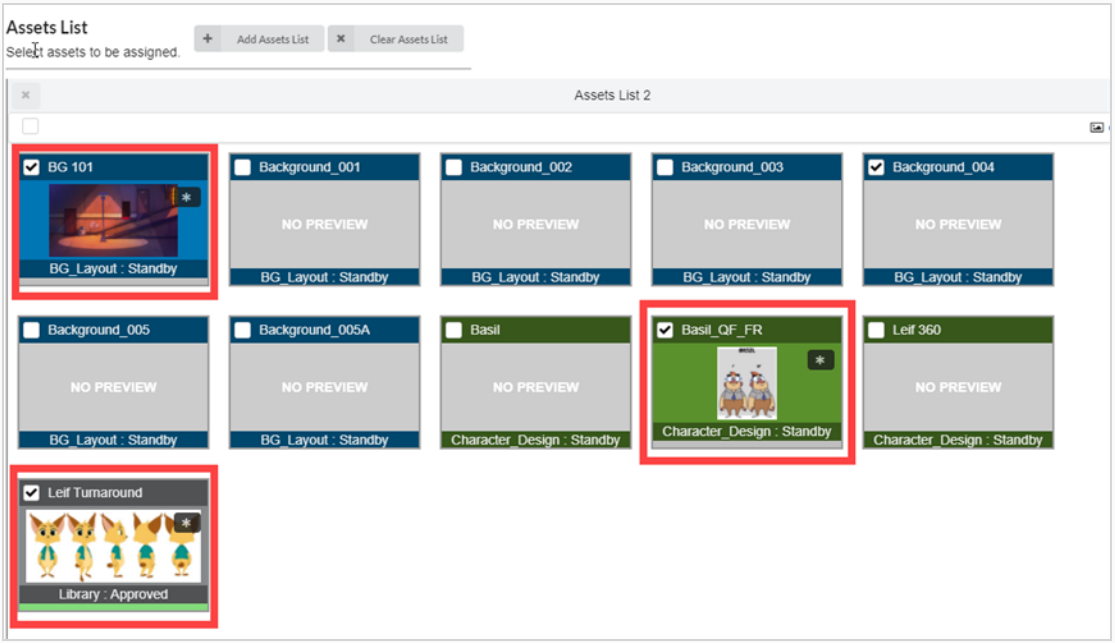
2. Locate the environment/s, job/s, or scene/s you want to associate the asset to from the production List—see Searching Production List.

3. Select the item by checking the checkbox on the far left column of each item you wish to associate the asset to.

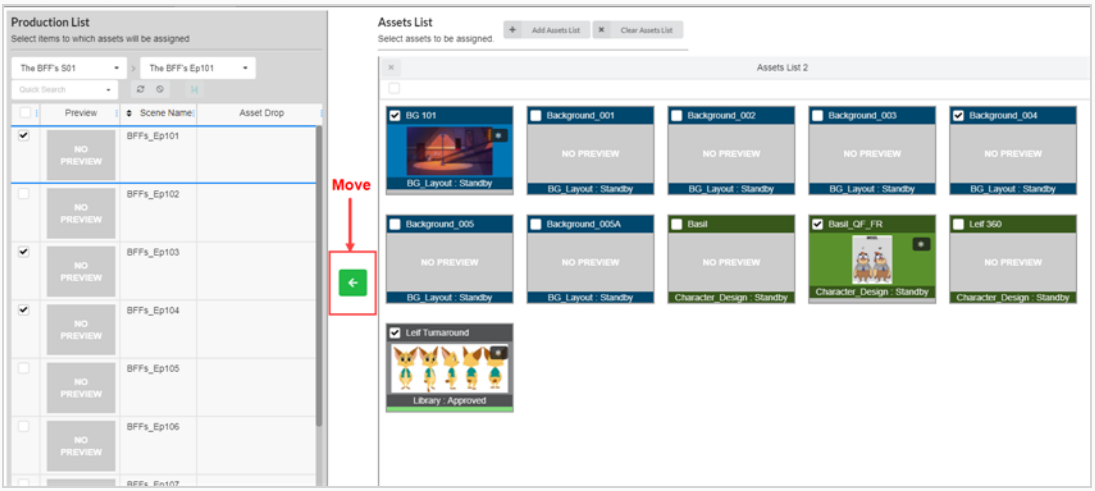


4. Locate the asset you want to associate to an environment, scene or job from the Assets List.

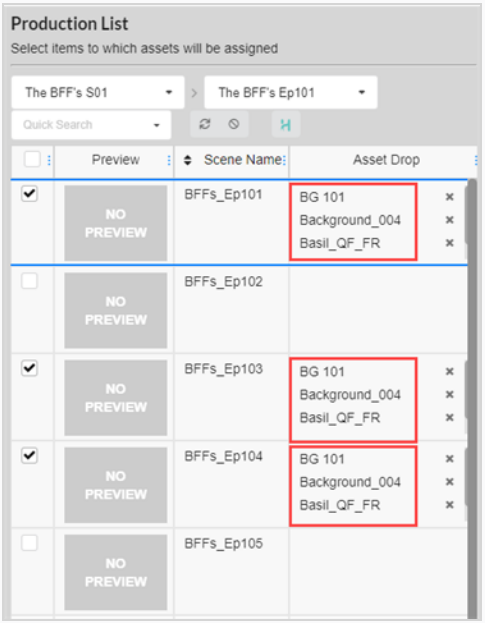
5. Select the asset by enabling the checkbox on the far left column of each asset you want to associate to an item.



6. Click the **Move** button to associate the assets to the items.



The assets are now listed in the Asset Drop column.



Disassembling

Assets that have been associated with environments, jobs and scenes can be disassociated at any time by disassembling them.

How to disassemble assets

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

   The Asset list opens.

2. In the Assets list, locate the environment, scene or job you want to disassemble.
3. In the Asset Drop column, click the Remove ✖ icon on the asset you want to disassemble.

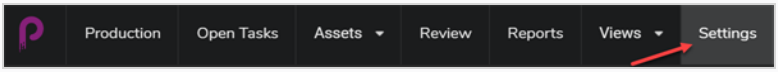
   The asset is removed from the Asset Drop column.

Checking the Asset Progress in a Scene Workflow

From a scene workflow, you can check the asset creation progress by adding a Progress process. This node will track the percentage of completion of the assets assigned to the scene.

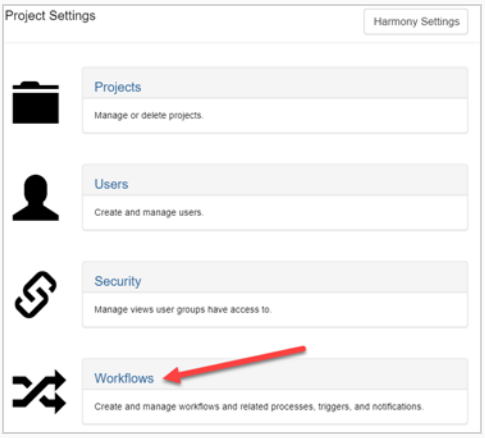
How to add a Progress node to a workflow

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



   The Project Settings are displayed.

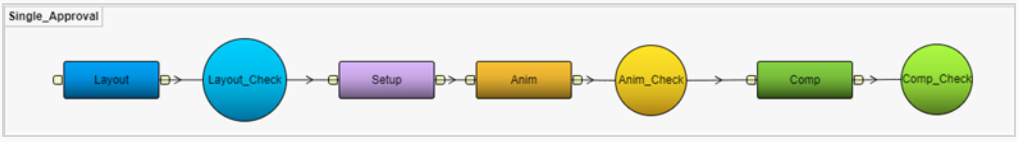
2. Select **Workflows**.



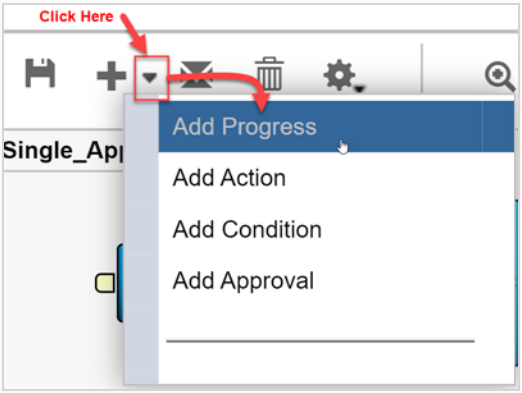
   The Workflow tab opens.

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

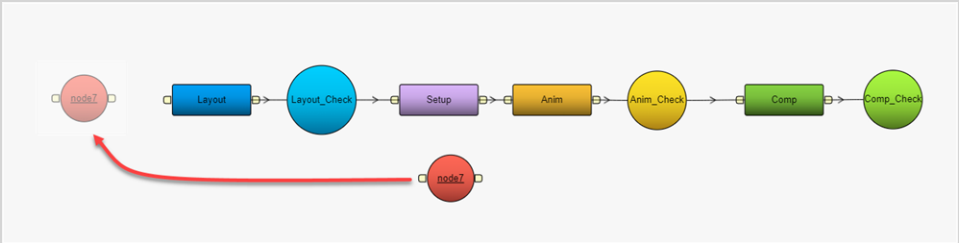
   The workflow appears in the editor.



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

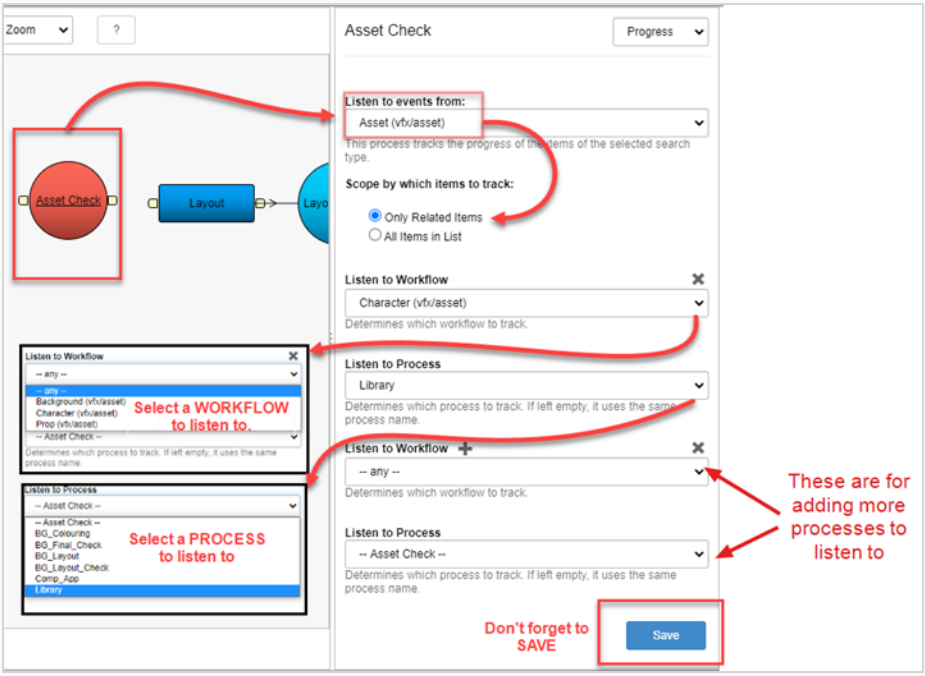


The new node is added to the workspace.

> **NOTE**
>
> Producer reads everything linearly, so the new node must be placed to the left of the Workflow.
>
> 
>

6. Rename your node to reflect the purpose, In this case, **`Asset Check`**.
7.
> **NOTE**
>
> To rename any node, either right-click and select **Rename** or press Ctrl/Cmd Click on the node.

8. Select the Asset Check progress node.
9. In the Properties view's Listen to events from field, select the Asset or any type of element you would like this to track in your workflow. You can track multiple items.



10. To save the changes to the process, click the Save button.

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

Chapter 9: Harmony Integration

Producer can be used independently from other Toon Boom software. However, there is a high level of integration possible for a studio using Harmony as an animation software and even more so when using Harmony database.

This chapter will cover the aspects of Producer integration with Harmony, with a special focus on synchronization between Producer and Harmony database, assembling assets into Harmony scenes (aka Baking) as well as the increasingly popular setup to work remotely. A specific section is dedicated to Producer Harmony Scripts, covering their general interface and usage scenarios (Working with Database, offline or standalone scenes).

Working with Harmony Database

NOTE

This section is intended for more advanced users (administrators and power users) who can configure Harmony Server and have advanced permissions in Producer.

This section describes how Producer inter-operates with Harmony Database, and the various integrations available to the users.

The following topics will be discussed:

- How Producer and its components interact with Harmony.
- How to configure Harmony (WebCC) to work with Producer.
- Harmony-Producer synchronization features
- assembling (baking) assets into Harmony scenes

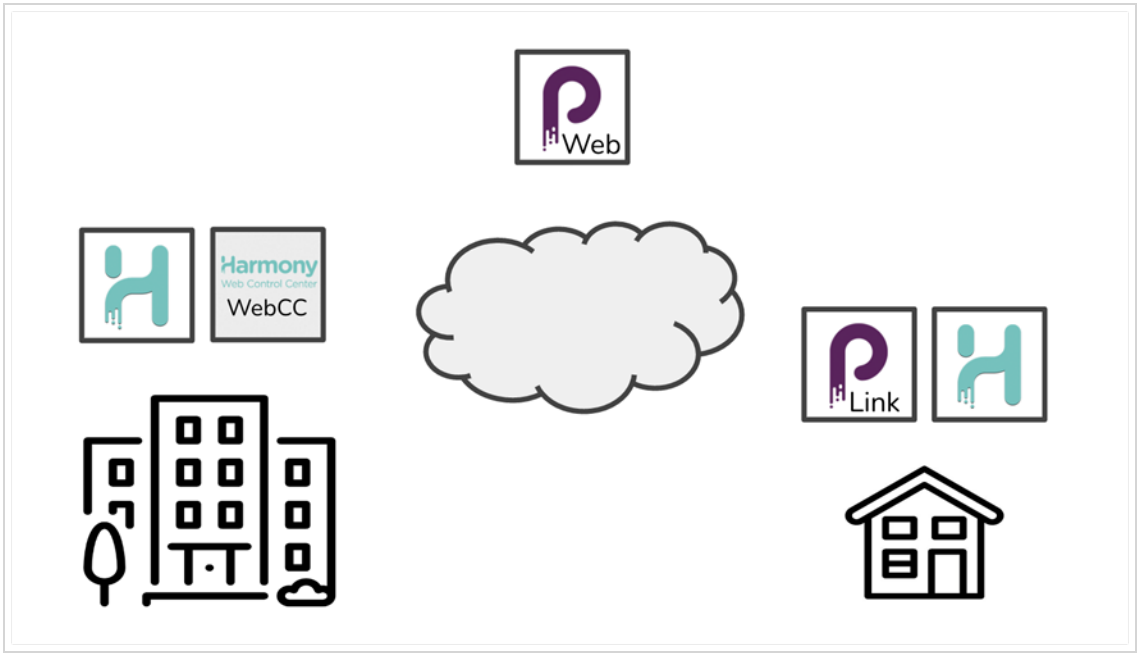
You may also have a look at the following topics:

- Working from Home
- Harmony Scripts

Topology

For Producer to inter-operate smoothly with Harmony Server and its users, we will need to configure the following applications.

- Producer (in the cloud)
- Harmony Server (at the studio)
- WebCC (at the studio)
- Producer Link (on the users' machines, at the studio or at home)
- Harmony Client (on the users' machines, at the studio or at home)



The applications involved in the exchange process are the following:

Producer: A web based application usually hosted in the cloud. It acts as a one-stop interface to keep track of the production while at the same time synchronizing with Harmony Server. Users are typically making requests through Producer web interface. Producer then handles requests and communicates with Harmony Server.

Producer Link: Installed on the users' machines, this desktop application is a complement of the Producer web application. It is used to perform operations that are not permitted by a web application (any tasks requiring direct access to edit local files, such as decompressing a file). We also use Producer Link to configure workspaces (used by Harmony Scripts as well as for uploading assets to Producer), or set up exchange folders when working remotely.

Harmony Server: Located at the studio, Harmony server hosts the Harmony Database. It communicates with Producer via a communication queue between Producer and Web Control Center (WebCC).

WebCC: Installed at the studio, WebCC handles all communications between Producer and Harmony. Communication with Producer is handled via a dedicated message queue. Messages are posted to this queue and processed asynchronously, so that no operation becomes blocking. WebCC needs to be started with specific configuration options to communicate with Producer, for synchronization operations, assembly, as well as for remote (Working From Home) setups.

Harmony (Client): Installed on the users' machines, Harmony is used to work on scenes. Harmony Scripts bundled with Producer can be installed to update a scene state in Producer directly from Harmony. When working remotely, Harmony Scripts also take care of uploading the scene changes back to the server.

Configuring WebCC

In order to perform operations in Harmony, Producer needs to establish a communication channel with Harmony Web Control Center (WebCC).

Communication between Producer and WebCC is done through a **message queue** which is configured in Producer. In short:

- Producer sends a message (such as creating a scene) to its outgoing queue to WebCC.
- WebCC, which monitors that queue, reads the message, and proceeds with the command. Once completed, it sends the result of the operation to a response queue, which is monitored by Producer.
- Producer reads and processes that response (for instance, it may send an update to Producer Web interface to inform the user that the requested operation has completed)

In addition, WebCC will require workspaces to be configured in order to assemble assets into scenes.

When Working Remotely.

Please note that when Working from Home, an **Exchange Folder** will also need to be configured.

WebCC startup options

NOTE

This section only describes WebCC configuration options related to Producer.

For information about how to configure and start WebCC, refer to Harmony Documentation WebCC Installation Guide.

Option	Description
-producerAMQP <WebCC Queue>	Address of Producer message queue (can be found in Producer top right menu > General Settings > WebCC Queue a. Copy the "WebCC Queue" address (use the "Copy to clipboard" icon). b. Add this to WebCC startup options, e.g: -producerAMQP amqs://xyz:abcd@mystudio.producercloud.io
-producerCodes <list of producer project codes>	When working with multiple Harmony Databases, add **-producerCodes** parameter followed by the list of Producer project codes to be associated with the selected Harmony instance.

Option	Description
	This is a more advanced (and optional) setting which requires configuring **multiple projects** in Producer, where each Producer project will write to a specific message queue, and each WebCC instance will point to one or more Producer projects. For instance: • Harmony Server 1 => -amqpUrl xyz:abcd@mystudio.producercloud.io -producerCodes main_project,project_2 • Harmony Server 2 => -amqpUrl xyz:abcd@mystudio.producercloud.io -producerCodes main_project,project_2
-exchange <path to exchange folder>	The "Exchange" folder is a folder where WebCC will deposit exported scenes, and users will upload scenes to be updated. If not specified, the default location (/USA_DB/exchange) will be used. It can be useful to change it: • when packages are transferred via a shared folder (synchronized between the server and the remote users) and Producer **Offline Scenes** setting is set to "Exchange Folder". • when space in /USA_DB/ is an issue.
-exportFolder <path to zip folder>	The "Export" folder is a temporary location where exported scenes are compressed, and uploaded packages are uncompressed before importing the scenes. If not specified, the default location (/USA_DB/zip_folder) will be used. This option location may be changed if space in /USA_DB/ is an issue.
-jwtExpiry	When Producer Offline Scenes setting is set to "Direct WebCC connection", determines the time

NOTE

When working remotely, WebCC cannot be started with the **-noAuth** option.

Workspaces

Producer makes use of **workspaces** to keep track of production resources locations. WebCC uses those workspaces when assembling assets into scenes.

A workspace is typically defined by an **alias**, associated to a real path on the filesystem.

WebCC reads the list of workspaces from /USA_DB/workspaces.json file, which can be generated manually or using Producer Link.

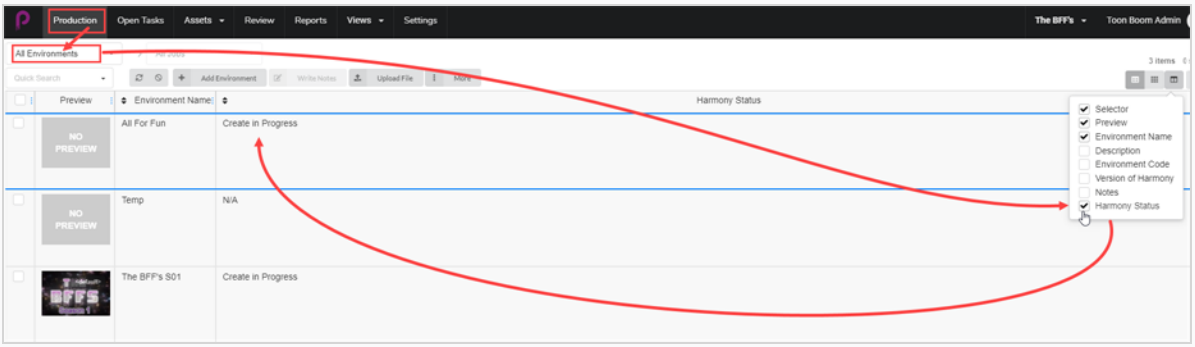
Harmony Synchronization

How to view Harmony Synchronization status

> **NOTE**
>
> Harmony Status is available in the Production Page for Environments, Jobs and Scenes, as well as in the Assets > Manage page.

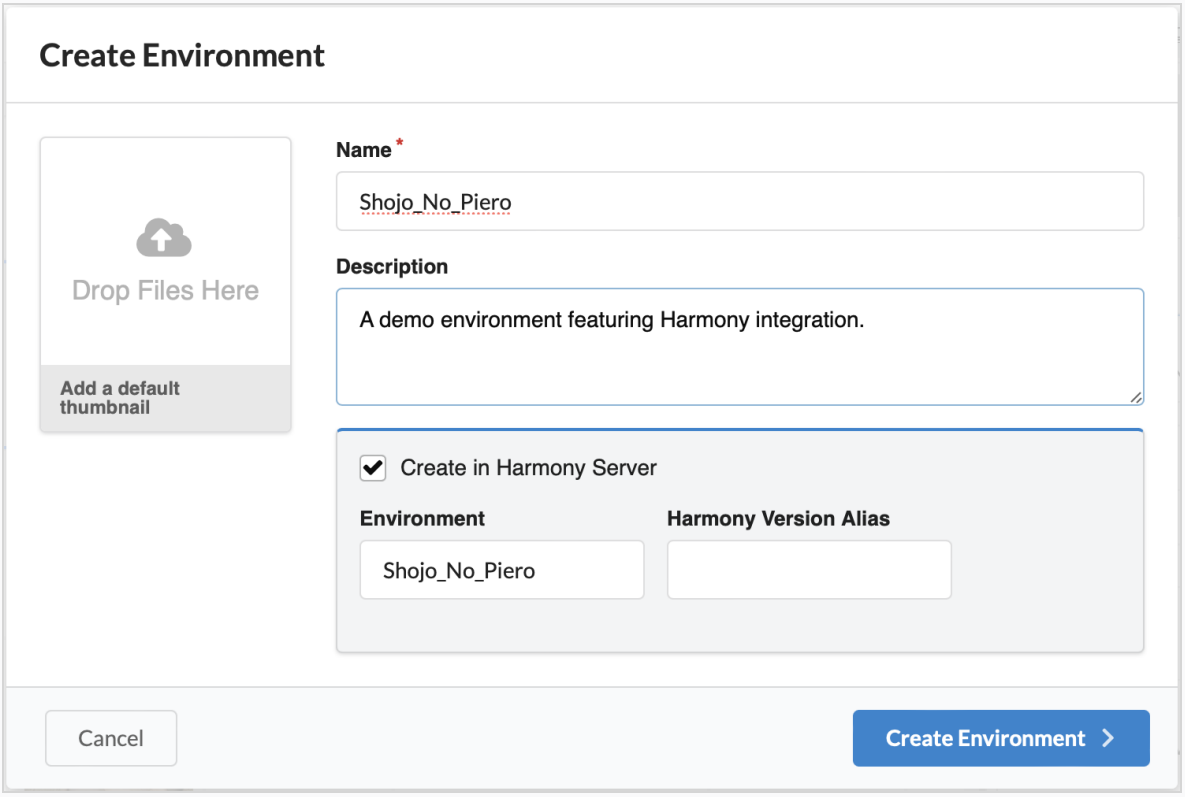
In the **Table view**, go to the **Column Selector** and check the **Harmony Status** box.

This activates the **Harmony Status** column in the table.



How to create environments in Producer and Harmony Server

1. Follow the instructions in Production > Creating Environments, and select the “Create in Harmony Server” checkbox:
    a. The Harmony **Environment** is automatically generated from the ***Name*** field but can be overridden. If there are spaces in the name, they will automatically be replaced by underscores. Harmony doesn’t allow spaces in names.
    b. **Harmony Version Alias:** You can optionally enter a label identifying a version of Harmony (See Producer Link Settings page).

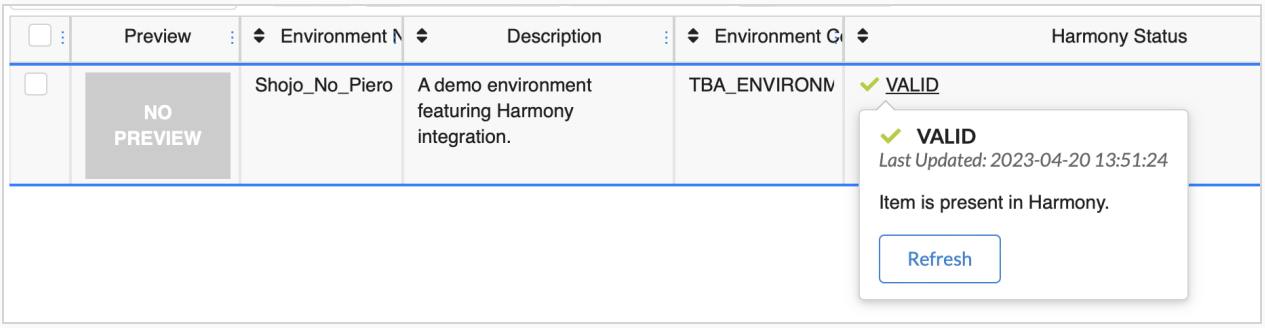


2. Click on the **Create Environment** button.

   The new environment will be sent to the WebCC queue for creation.

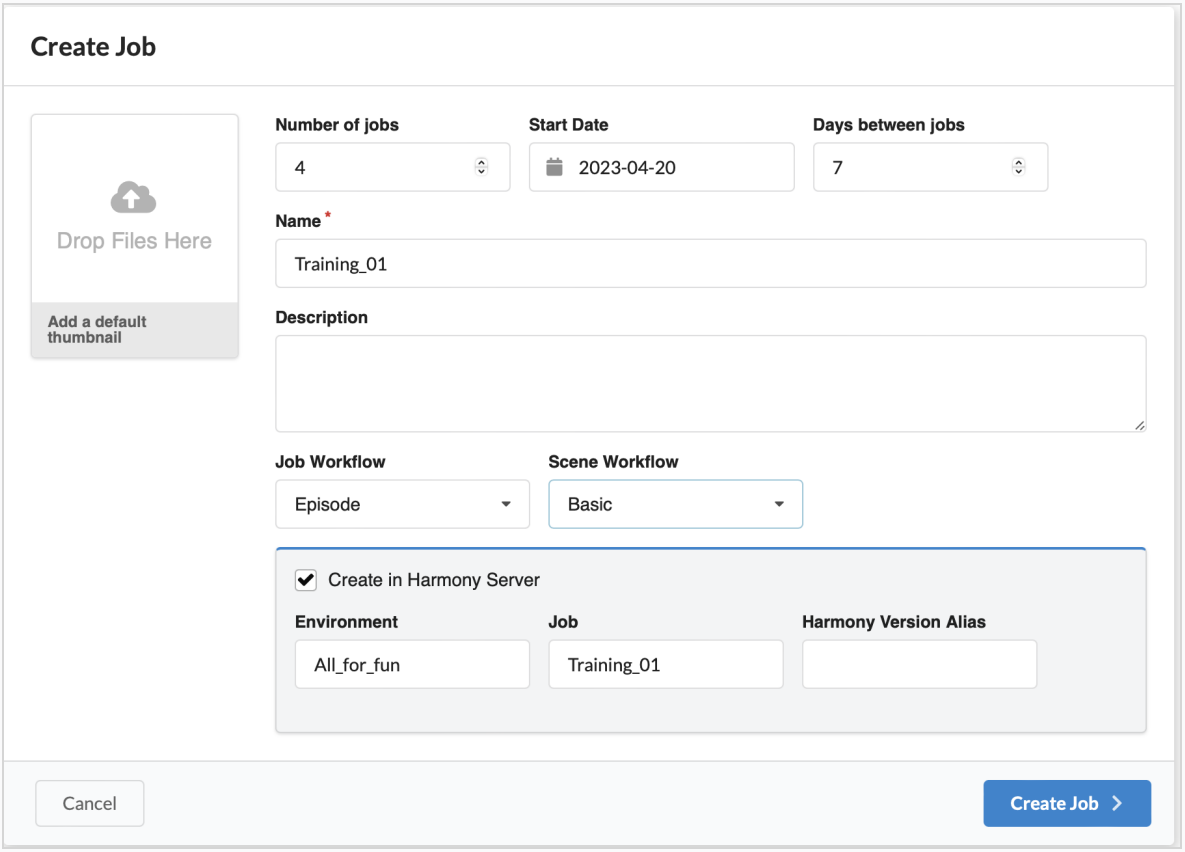
3. Go back to the **Production** > **All Environments**.
4. The **Harmony Status** indicates **"Create in Progress"**.
5. Hit the **Refresh** button or wait for the status to update on its own.

After a while the Harmony Status is updated to **VALID**. Clicking on the link will display information regarding the operation. The new environment now appears in the Harmony Server or will remain in the queue until there is a proper connection to the Harmony Server.



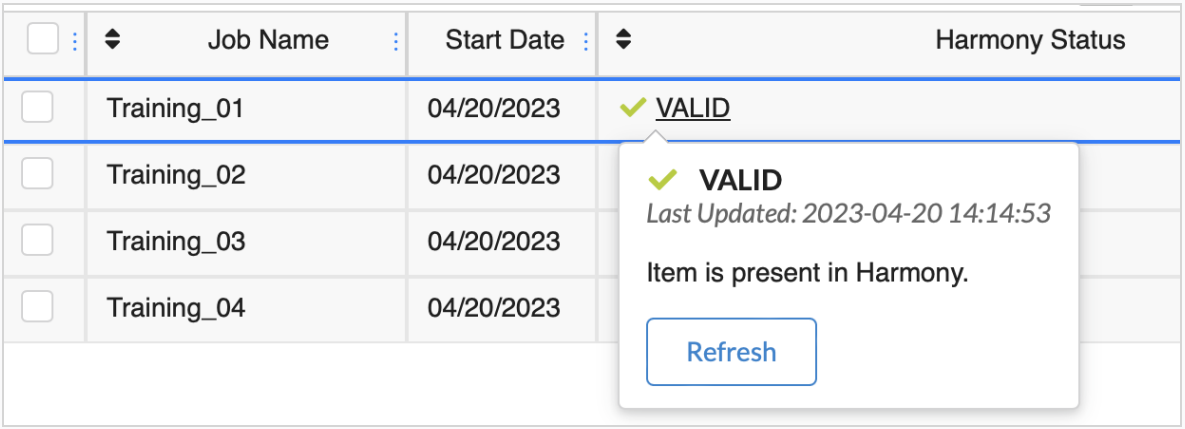
How to add jobs from Producer into Harmony Server

1. Follow the instructions in Creating Jobs, and select the “Create in Harmony Server” checkbox:
    a. The **Environment** field is automatically set from the parent Harmony environment. It can be overridden here to point to an alternate Harmony environment, but the environment will **not** be created in Harmony.
    b. The **Job** field is automatically set from the one entered into the ***Name*** field. Spaces will be replaced by underscores.
    c. **Harmony Version Alias:** You can optionally enter a label identifying a version of Harmony (See Producer Link Settings page).



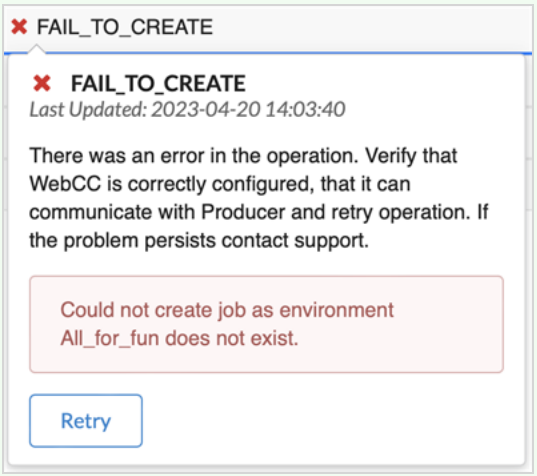
2. Click the **Create Job** button.
3. The list of jobs is quickly updated (hit the Refresh button if isn’t) while the new job creation request is sent to the **WebCC queue**. All the jobs have a sequential numerical order.

    The **Harmony Status** indicates “**Create in Progress**” and should quickly change to “VALID”, and appear in Harmony Control Center.



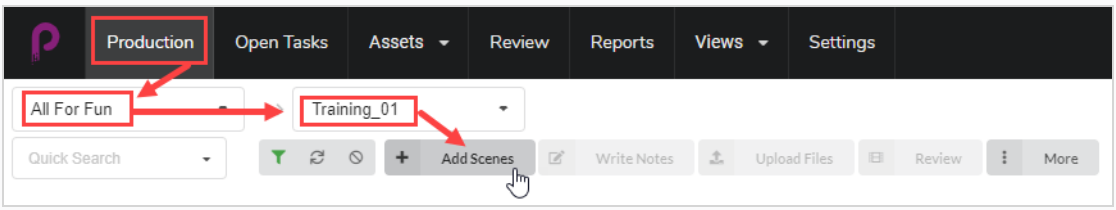
NOTE

- **Harmony Status** will stay in "Create in Progress" until the request has been processed by WebCC. The job creation request will remain in WebCC queue until a proper connection is established and until processed.
- In Harmony, Job names are **unique**.
- If an error occurs, **Harmony Status** will change to "FAIL_TO_CREATE" and display the reason provided by WebCC.



How to add scenes from Producer into Harmony Server

1. Follow the instructions for Creating a Scene.



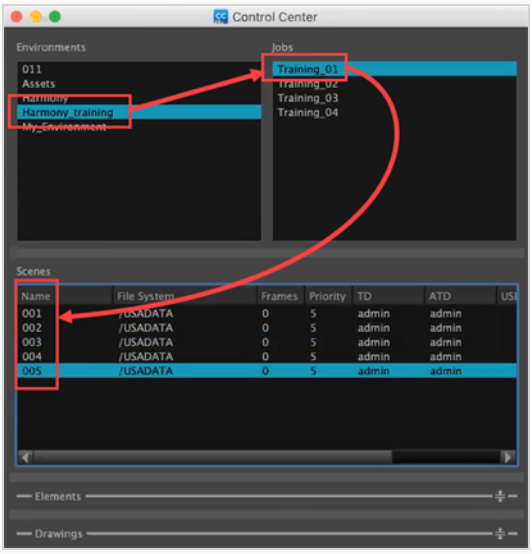
   - Check the **Create in Harmony Server** checkbox.
     - The **Environment** and **Job** fields are automatically populated from the parent job information. They can be overridden manually, but the environment and job will **not** be created in Harmony.
     - The Harmony **Scene** name is automatically generated from the one entered into the Name field. Spaces will be replaced by underscores.
     - **Harmony Version Alias:** You can optionally enter a label identifying a version of Harmony (See Producer Link Settings page)
2. Click **Create Scene**.
3. The list of scenes is quickly updated (hit the Refresh button if it isn't) while the new scene creation request is sent to the **WebCC queue**. All the scenes have a sequential numerical order.

   The Harmony Status indicates "Create in Progress" and should quickly change to "VALID". The scenes should also appear in Harmony Control Center.

How to create scenes/jobs in Harmony and synchronize with Producer

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

1. In your Harmony (Control Center or WebCC), create your scenes.



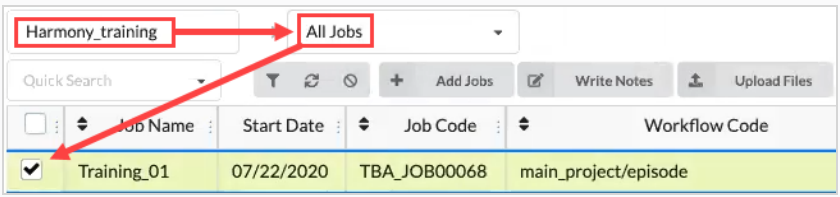
2. Once the scenes are created in Harmony, go back to Producer and in the main menu, select **Production**.

3. In the Environment and Job drop-down menus, select the environment and job you would like to populate with scenes created in Harmony.

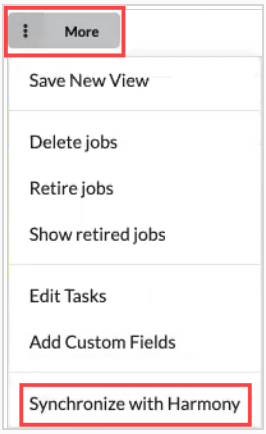
   No scenes will be visible yet.

4. In the Jobs drop-down menu, select **All Jobs**.

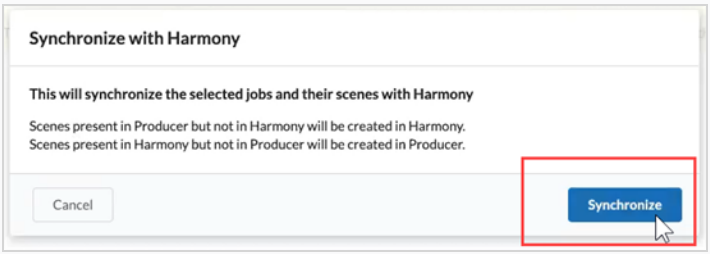
5. From the list of jobs that appear, select the jobs for which created scenes in Harmony by checking their checkboxes.



6. In the Production tab toolbar, select **More** > **Synchronize with Harmony**.

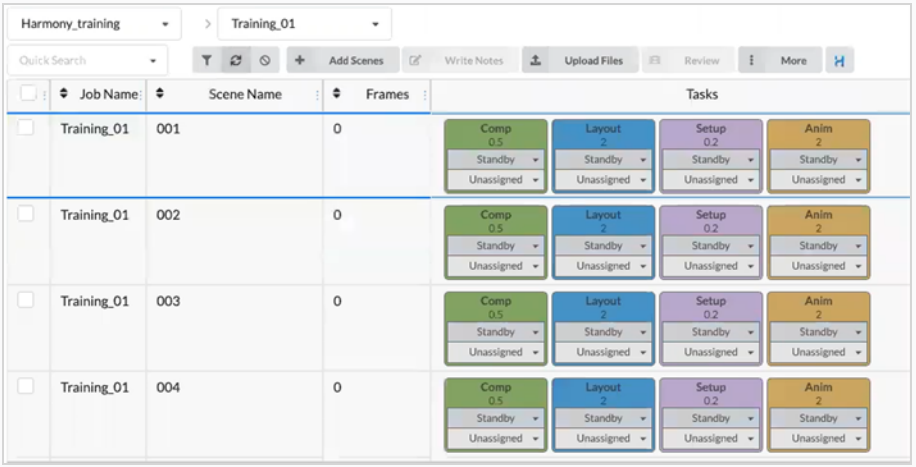


The Synchronize with Harmony dialog box opens.



7. Click on the **Synchronize** button.

The scenes appear in Producer.

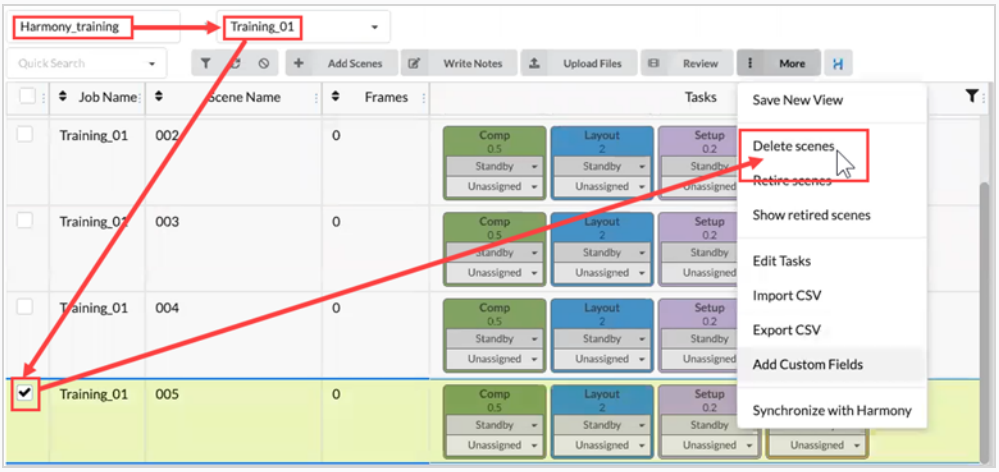


NOTE

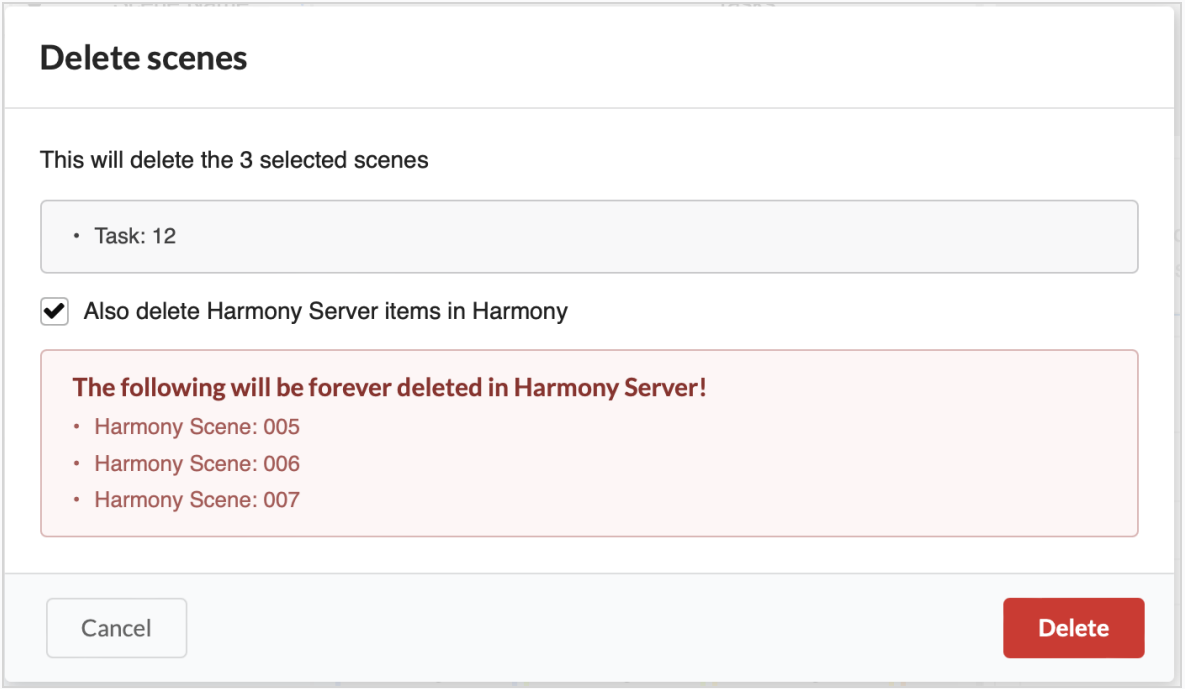
Syncing with Harmony will also update the frame counts to those set in Harmony.

How to sync Harmony with scenes deleted in Producer

1. Select an environment and job
2. Check the box on the left column for each scene you wish to delete. Then go to the More tab and select Delete Scenes.



3. The Delete scenes dialog box opens.



Click on the **Delete** button.

4. The **Delete** request is sent to WebCC's message queue.

Until it's completed, the scene list will keep on displaying the scenes with a Harmony Status to "DELETE_IN_PROGRESS". Once deleted from Harmony, the scenes will be deleted from the scene list in Producer as well.

Assembly and Baking

Assembly refers to the process of associating assets to scenes, and then pushing those assets into their target Harmony scenes in a process referred to as “baking”.

The **first step** in Assembly is to build a list of assets and associate those assets with scenes. This is done in the Assets > Assembly page.

Then, asset **snapshots** containing references to the actual asset files on the filesystem shall be uploaded to Producer, using Harmony Asset Snapshot Script, or Producer Link’s Upload External Asset or Upload Assets CSV.

NOTE

Producer never keeps the actual asset files on its filesystem. Instead, it takes “snapshots” made up of a **preview** and a **reference** to these files on the Studio’s filesystem.

Finally, assets may be copied to their associated scenes directly from Assets > Assembly page by opening the Harmony Bake dialog (button with the Harmony Logo).

In order to properly assemble assets into scenes, communication with WebCC needs to be enabled, and the list of workspaces needs to be defined in /USA_DB/workspaces.json.

Requirements for Baking

WebCC	WebCC is a Harmony application that is able to communicate with Producer. For the baking to work, you have to use WebCC version 17.0.3 or higher.
workspaces.json	Setup manually, the file /USA_DB/workspaces.json specifies which folders can be used to store templates and must also specify the folders containing assets so that Harmony can find these assets and paste them to the scenes.

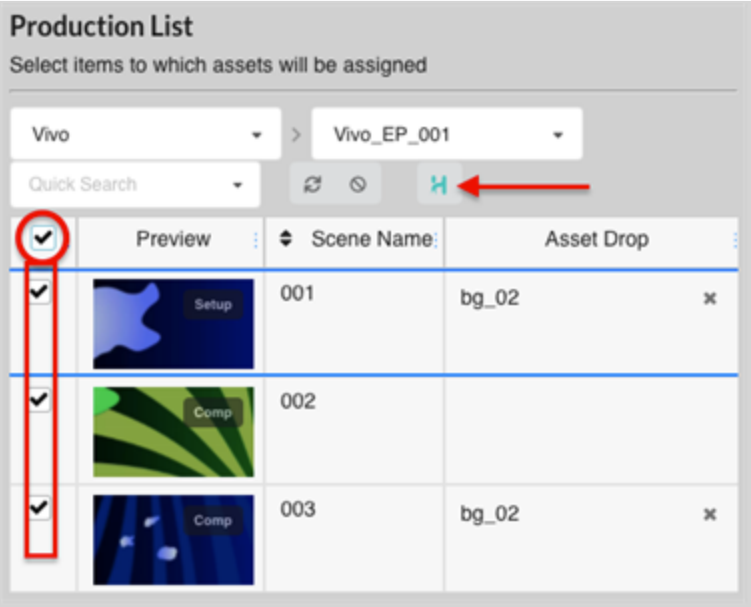
How to bake assets into scenes

1. Create an external asset — see Creating Assets.
2. Upload a snapshot of that asset — see Uploading External Assets in Producer Link or Harmony Scripts.

IMPORTANT

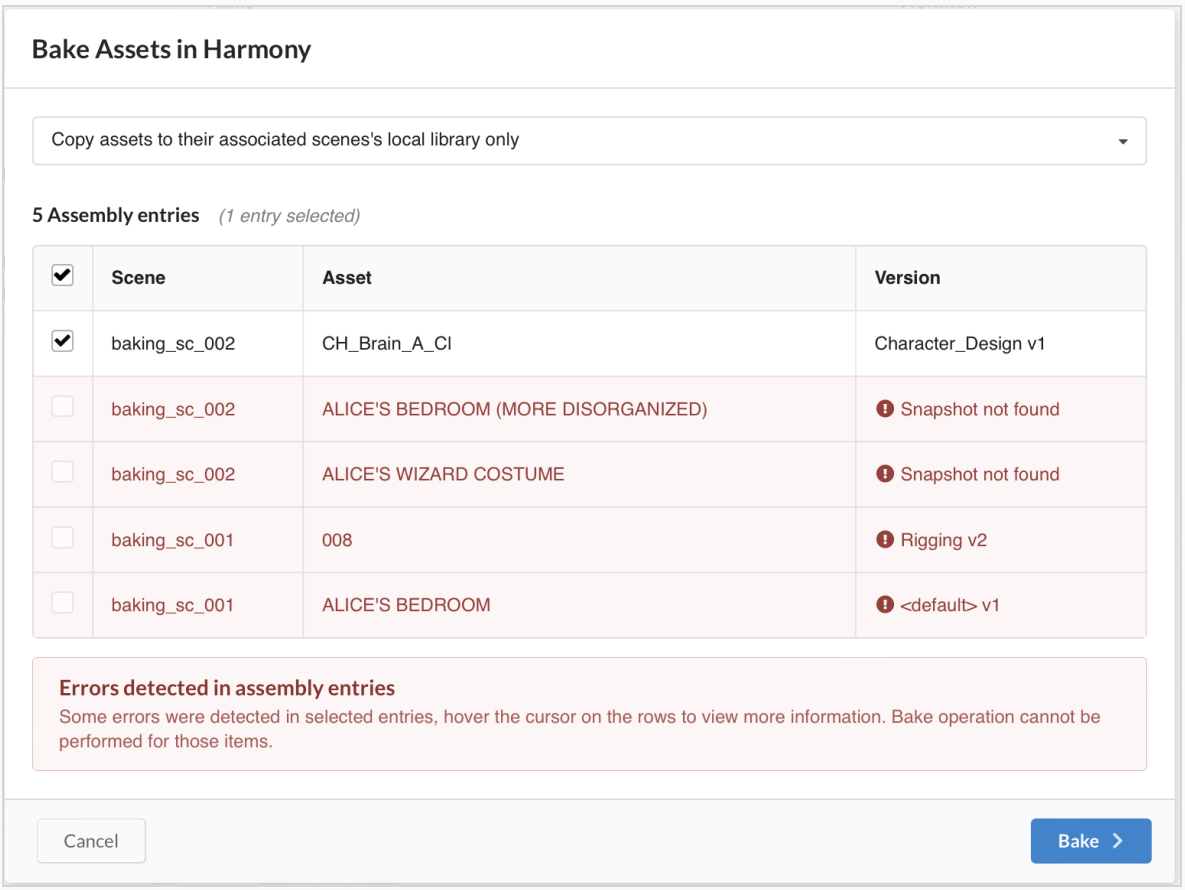
A snapshot uploaded directly from Producer’s “Upload File” dialog will not contain the information necessary to later assemble that asset.

3. Open the Assembly page and navigate to an environment and job's scene list from the Assembly Production list (left pane)
4. Associate the created asset with one or more **scenes** — see Assembling.
5. Select one or multiple scenes to bake.

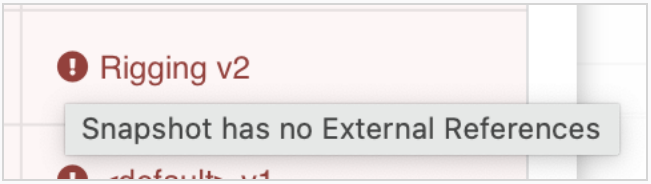


6. Press the **Bake** button

7. The Bake Assets in Harmony dialog box appears, showing a list of assets to be assembled and running a preliminary verification of the assets to be baked.



Only assets with valid snapshots may be submitted for baking. Pre-flight errors will be clearly highlighted. Hovering over the warning icon will provide more contextual information regarding the problem.



8. Click on the drop-down menu to select how you want the asset to be baked.

    - **Copy assets to their associated scene's local library only** (Default)

      This option makes the asset available within the scene without adding it to the timeline and Node view.

    - **Always paste assets into the scene itself**

      This option puts a copy of the asset in the local library of the scene and will add the asset directly to the timeline and the Node view. To protect the work that was done and to avoid

confusion, this option creates a new version of the scene that will be called “producer paste” and this version will become the current version.

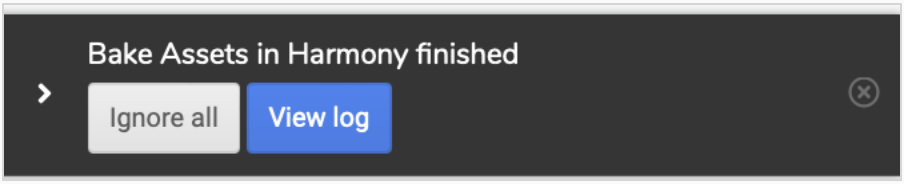
> **NOTE**
>
> The last option that you selected will be set automatically next time you open the dialog.

9. Click on the **Bake** button.

   This will start the baking process.

> **NOTE**
>
> BAKING CAN TAKE TIME!
>
> Baking consists of two separate operations:
>
> - Copying asset files into the scenes’ respective libraries
> - Pasting those assets into the Harmony Scene itself

10. Open the Assembly Logs from the notification Toast.



11. Click on “View Log” to check the status of the operation.
12. Follow the progress and status of the operation from the Notification Feed.

    Hovering over the status should provide more information about the nature of the error.

Working Remotely

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

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

Producer - along with Producer Link and bundled Harmony Scripts - will play a key role in simplifying the process of retrieving a scene to work offline and sending it back to the Harmony Server.

In a remote configuration:

- **Harmony Server** handles user requests for exporting/importing scenes and checking scenes in and out via **WebCC**.
- **WebCC** handles all communication between Producer and Harmony Server. It responds to export requests from Producer by exporting compressed scenes to the users' outbound Exchange folder. It responds to import requests from Producer by monitoring the users' inbound exchange folder and importing the scene back to Harmony once received.
- **Producer Link** handles all operations that need to be performed on the users local machines. It responds to Open Scene requests from Producer and maintains a list of already exported scenes. It takes care of monitoring incoming exported scenes, uncompressing and opening them in Harmony. It is also used to configure workspaces used by Producer Harmony Scripts.
- **Producer** acts as a proxy between the remote user machine (via Producer Link and Harmony Scripts) and Harmony WebCC.
- **Harmony Client**: when working remotely, Harmony will open exported scenes in offline mode, but those scenes will still be recognized as “offline database scenes”. Producer’s Harmony Scripts will offer additional options to upload the modified scene back to Harmony.

In addition, when working with assets, an assets library folder must also be shared between the studio and the user’s machine, so that templates (.tpl) may be saved and later retrieved.

Configuration

When exporting or importing scenes between Harmony and remote users, two modes are available:

- Using an Exchange Folder shared between Harmony server and the remote users
- Using a Direct connection to WebCC

These are configured in Producer General Settings > Harmony Integration.

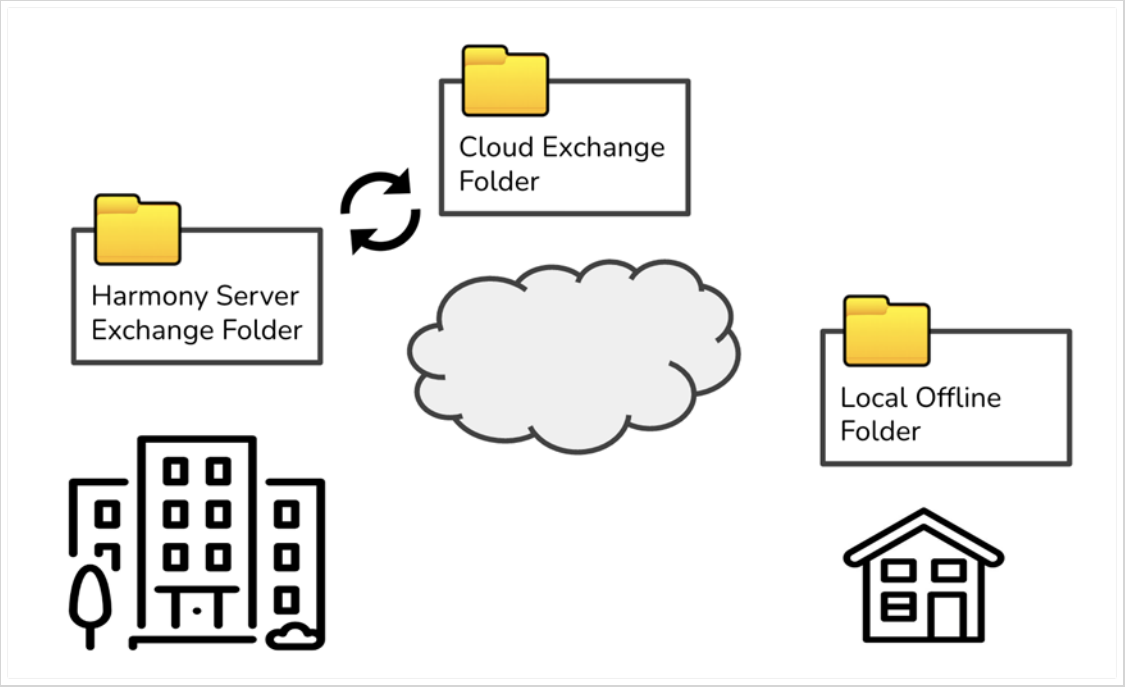
Using a shared Exchange Folder

In this configuration, all scenes export and import packages are saved to a folder (the “Exchange” folder) which is synchronized between Harmony server and the remote users.

This exchange folder can be a shared network drive (using a standard network protocol such as smb, preferably over a Virtual Private Network), or using a Cloud storage and synchronization solution (such as Google Drive, DropBox...).

NOTE

In this configuration, the responsibility of transferring / synchronizing the files is delegated to an external service.



Harmony Server Exchange Folder: This folder contains all files being exported from or imported into Harmony Database. It contains subfolders with the Harmony usernames of the people exporting and importing scenes (username/exported/ and username/importing). These subfolders will need to be shared and mounted locally for each remote user.

This folder exists by default in /USA_DB/exchange, but can be changed to any other folder by setting the -exchange option in WebCC. It may be shared directly with the remote users, or synchronized to a Cloud storage.

Cloud Exchange Folder: When working with an external Cloud storage, this folder contains all imported and exported scenes. It is mounted by both the studio and the remote users (any user need only mount their own dedicated folder).

Local Offline Folder: This is where exported database scenes are decompressed and stored on the remote user's machine.

To use this configuration set Offline Scenes to Shared Exchange in General Settings > Harmony Integration.

Direct File Sharing

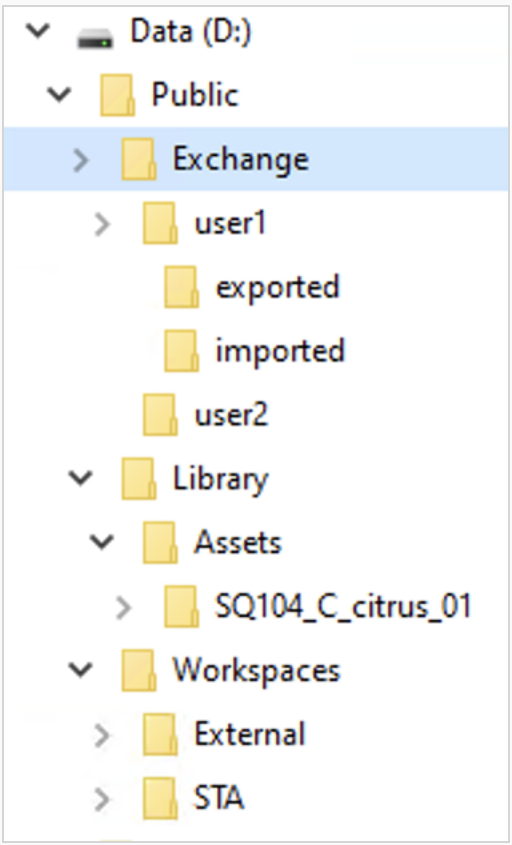
In this configuration, folders are shared directly from the Studio's filesystem, using standard file sharing mechanisms (such as smb).

- The **Scene Exchange folder** for exported/imported scenes is by default located under /USA_DB/exchange. You may consider changing it to a location outside of the /USA_DB folder. Remote users shall then mount this remote folder on their machine.
- Harmony **assets library** is located by default under /USA_DB/library/assets. Likewise, you may consider creating an alternate assets library folder in order to share it with remote users. A workspace shall be added in WebCC's workspaces.json file. Remote users shall mount that folder on their machine and add a workspace pointing to that folder in Producer Link Settings. This is only necessary when working with Asset Snapshot Scripts.

How to share folders on Windows (an example)

There are many ways to organize and share folders over a network. See File sharing over a network in Windows from Microsoft support for detailed instructions.

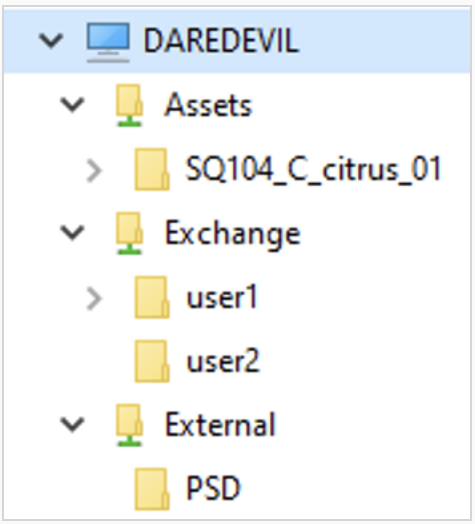
Consider the following, where administrators decided to locate all shared folders on the **D:\Public** drive.



You should minimally:

- Share the D:\Public\Exchange folder. The Exchange folder is initially empty and Harmony will create user folders as it receives export requests.
- If working remotely with Harmony assets, share the D:\Public\Library\Assets to store asset templates.
- If working with external assets, you may share additional folders (Workspaces)

The shared folders will become available in the network drives:



Cloud File Sharing

Shared cloud storage solutions can be leveraged to implement the exchange mechanism between the studio and the remote users. This setup is suitable for organizations which cannot share their internal filesystems, or who are already using a Cloud storage solution as part of their pipeline.

We use Google Drive as an example of how Cloud File sharing may be configured. Other Cloud solutions such as Dropbox or Microsoft suite may be used.

A Google Drive application is installed on both WebCC's side and remote users.

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

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

Once the Harmony server and WebCC are up and running, it is now time to synchronize the content of the exchange folder with a cloud service.

How to share the Harmony Server Exchange Folder on the Cloud

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

1. Download and install the Google Drive application on the host of the Harmony server exchange folder.

2. Using the Google Drive interface, add your Harmony Server Exchange Folder (/USA_DB/exchange) to the list of folders to be synchronized with Google Drive.

NOTE

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

Sharing cloud exchange access with individual remote users

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

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

    Cloud Exchange Folder/

    └ Andres/

    └ Barbara/

    └ Jonathan/

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

How to mount my Harmony user exchange sub-folder

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

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

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

- **Exchange Cloud Folder/** for exchanging scene contents
- **Cloud Assets folder** for asset templates upload

Using Direct WebCC Connection

In this configuration, scenes are exported and imported by downloading or uploading directly from or to WebCC.

To use this configuration set Offline Scenes to Direct WebCC Connection along WebCC Url in General Settings > Harmony Integration.

Offline Scenes	Direct WebCC Connection
WebCC Url	Specify the url address of WebCC. This address must be accessible to the users working remotely, and it is highly recommended that it is used through a Virtual Private Network.

WebCC must be accessible to the remote users through a secure channel (VPN).

As the responsibility of transferring the files is WebCC’s, it may require a more robust configuration to handle the additional load.

Exporting Scenes Offline

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

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

Scenes may be exported **explicitly**, by opening the **Export Offline dialog** from the **More** toolbar button of the Production, Assets, or Open Tasks page or from Producer Link. They may also be exported after clicking on the **Open In Harmony** button after selecting a scene, if no up to date version of that scene is already present on the user's machine.

NOTE

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

Default Export Options

When exporting a scene offline from the Harmony database, some default options are used to select which elements should be exported. These options can be changed for the project from General Settings > Harmony Integration > Offline Export Options dropdown. These will be used when exporting a scene from the Open In Harmony button or from Producer Link.

By default, the following options are set:

- Stage
- Element
- Audio
- Timing
- Palette
- Scene Palette
- Other

Here is a detailed description of each of the options:

Option	Description
Annotation	The different drawings created while drawing in the Annotation columns.

Audio	The content of the Audio directory.
Element	The contents of the Element directories. (tvg drawings or other file format imported as Elements in Harmony)
Timing	The contents of the Timing directories.
Stage	The *.xstage, *.aux and other files that are necessary to open the scene. **IMPORTANT** This option should always be selected!
Palette	The PALETTE_List file. The Palette list is a file listing every palette used for the scene and their location on the browser.
Scene Palette	The palette-library of the scene level.
Job Palette	The palette-library from the job level. When you select the job level, the palette-library in lower-level directories will also be exported. Every exported job palette will be placed within the folder named palette-library available under sceneName > jobs > Digital.
Env Palette	The palette-library from the environment level. When you select the environment level, the palette-library in lower-level directories will also be exported. Every exported environment palette will be placed within the folder named palette-library available under sceneName > environments > Digital.
Library	Templates created at the selected levels.
Scene Library	Templates created at the scene level.
Job Library	Templates created at the job level.
Env Library	Templates created at the environment level.
Other	All other directories and files in the scene's data structure. For example, some studios will place within the scene folder their After Effect, Photoshop or Premiere project used for the scene. This also includes the scene's scripts folder, which contains assets' master controllers.

Outside Drawings	If the Stage option is selected, it is possible to select the **Get Outside Drawings** option to copy drawings into the scene folder that is referred to by the Timing columns and their Element (Drawing) nodes.

IMPORTANT

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

These options may be overridden on a case by case basis from the Export Offline dialog (see below).

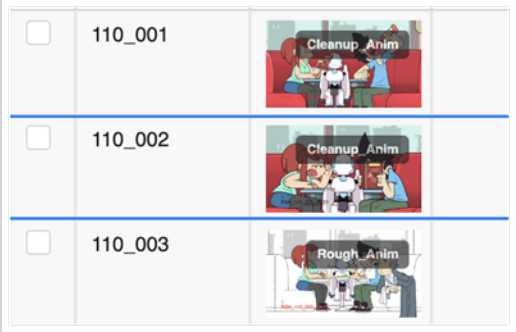
How to Export a Scene Offline from the Scene List

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

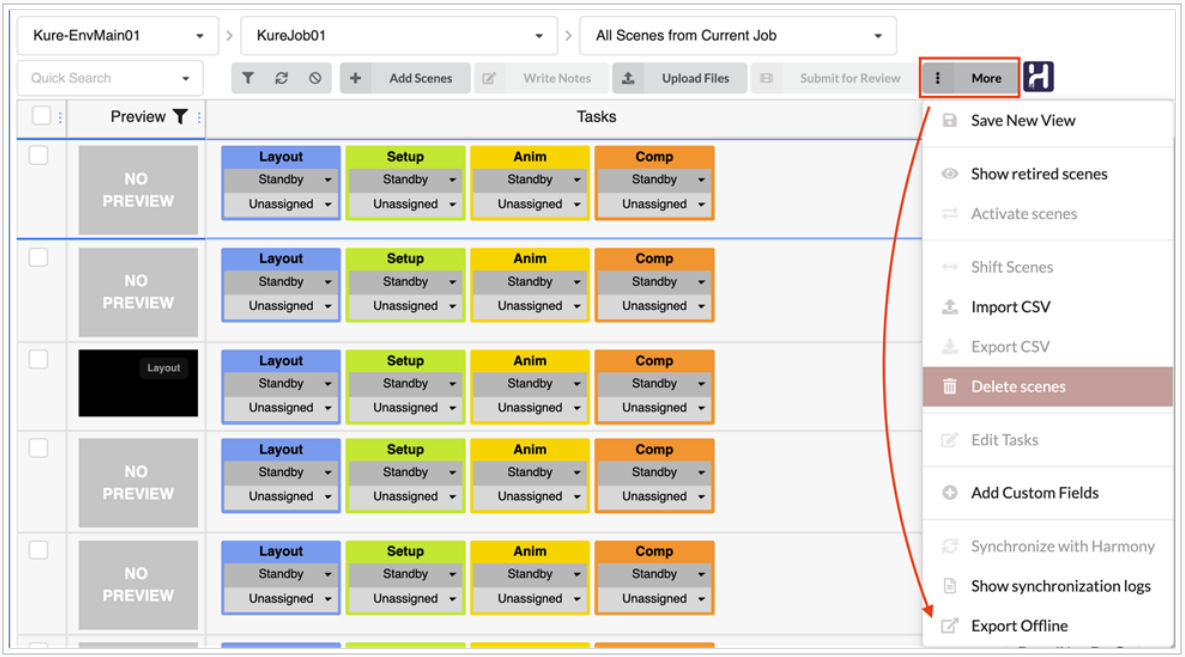
   NOTE

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

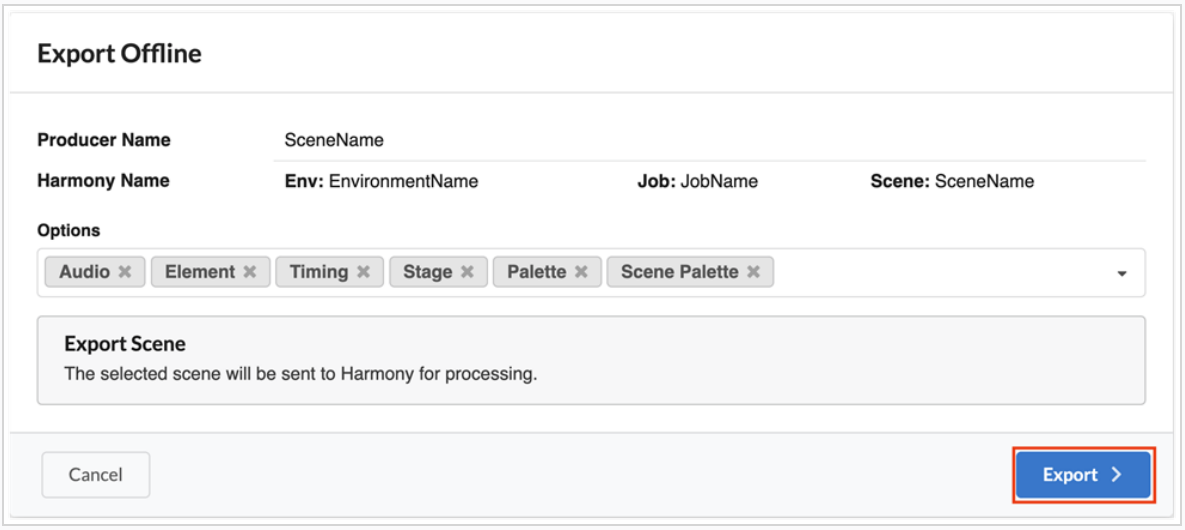
   The highlighted scene (the one surrounded by blue lines) will be exported, regardless of which scenes are selected via their checkboxes.

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



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



How to Export a Scene Offline from the Asset List

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

   > **NOTE**
   >
   > The asset must be synchronized with a Harmony Server.
   >
   > At the moment, it is only possible to export one asset at a time.
   >
   > The highlighted asset (the one surrounded by blue lines) will be exported, regardless of which assets are selected via their checkboxes.

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

How to Export a Scene Offline from the Open Task

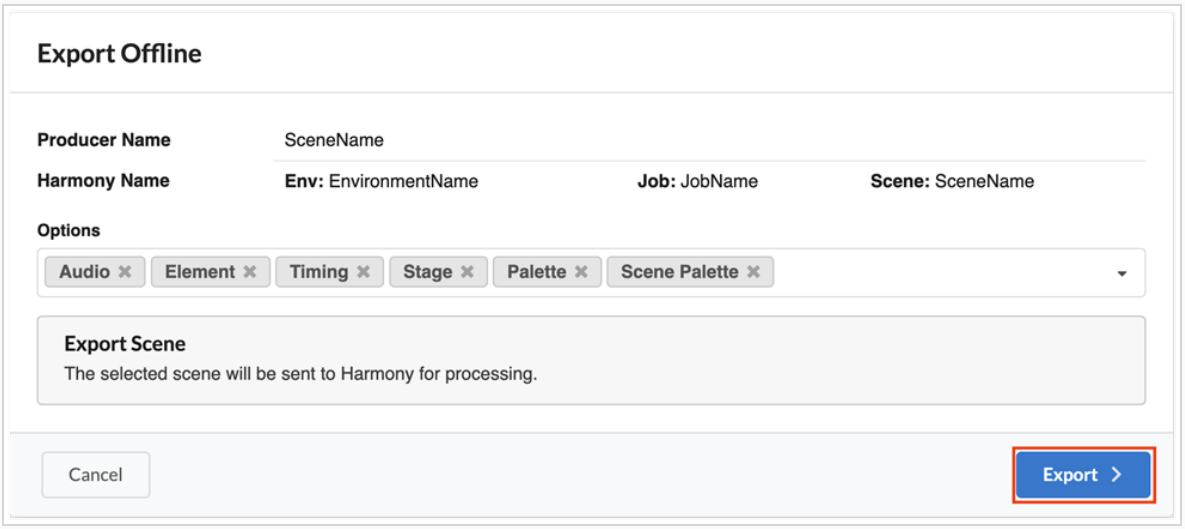
1. From the Open Tasks page, Highlight a scene by clicking on it.

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

2. Click on the “Export Offline” button.

   The Export Offline dialog appears.

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

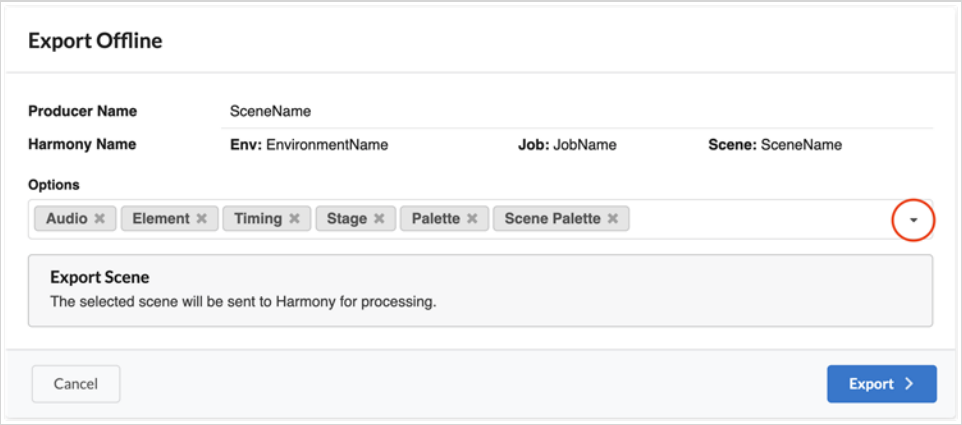


How to Modify the Export Options

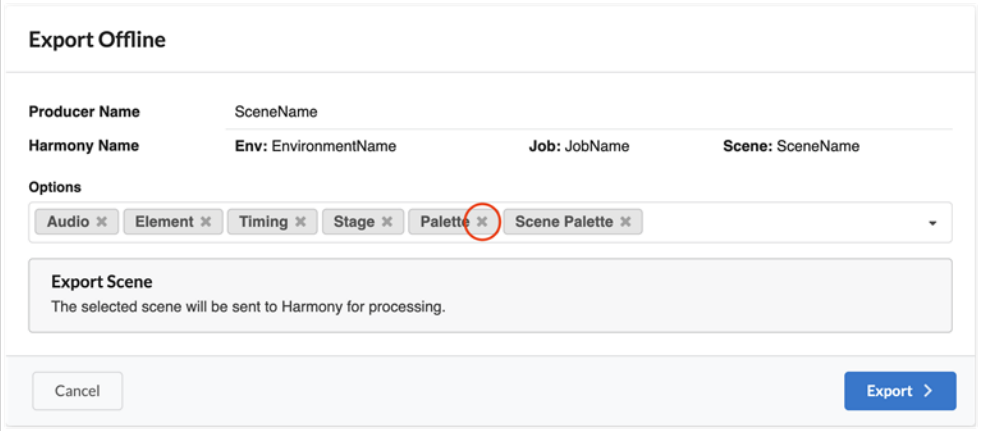
When exporting a scene offline from the Harmony database, the user can select what should be exported along with the scene. The user can choose to add elements that may be exterior to the scene itself, such as an Environment Palette. Similarly, the user may decide that he does not need everything and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

By default, the export options set in General Settings > Harmony Integration > Offline Export Options will be used.

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

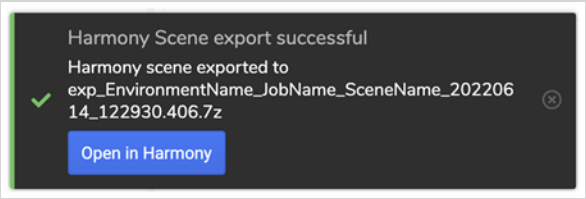


To remove export options, click on the “x” next to it.



Analyzing the Outcome of an Export

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



More importantly, the **Notification Feed** will be updated.

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

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

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

1. **Unfinished export**

   Until the export is completed, the export will show as "In Progress".

   It is normal that an export request takes time to be processed, especially for bigger scenes and if Harmony server is loaded.

   Likely causes:

   a. Server is slow and takes time to process the request.

   b. Too many requests are being processed at the same time.

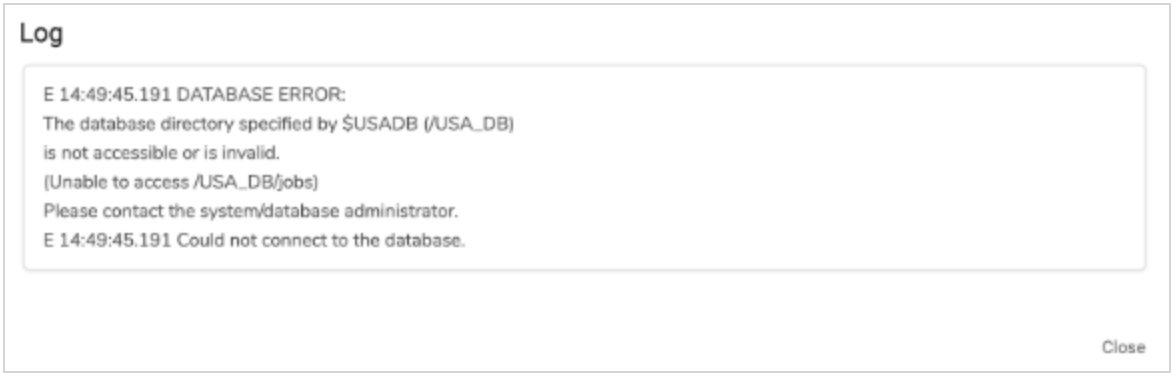
   c. WebCC service is not running

   d. WebCC service is not connected to the Producer queue

2. **Failed Export**

   A failed export will show up as an error in the notification feed.

Clicking on the (log) icon will display a log of the operation, including WebCC log:



Likely causes:

a. Scene, Job or Environment does not exist in Harmony Database

b. Harmony Database not available

c. Database Server (system) error: Disk full, Write permission error, ...

3. **Successful Export, but the scene never opens**

   Likely causes:

   a. While using “Exchange Folder” synchronization mode: WebCC completed the export successfully, but the synchronization (uploading file to the cloud or downloading it to the remote) takes time or is stalled.

   b. The location of the exchange folder is not properly set on the server or user side.

Opening Offline Scenes

NOTE

Opening an offline scene requires installing and configuring Producer Link.

Please refer to Configuring Producer Link and Open Offline Scenes sections.

There are multiple ways to open a Scene remotely.

- Open directly with the “Open in Harmony” button.
- Open a scene right after an export via the pop-up message.
- Open a scene later, using **Producer Link**. We describe a few scenarios here, please refer to Producer Link (Offline Scene) for more complete information.

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

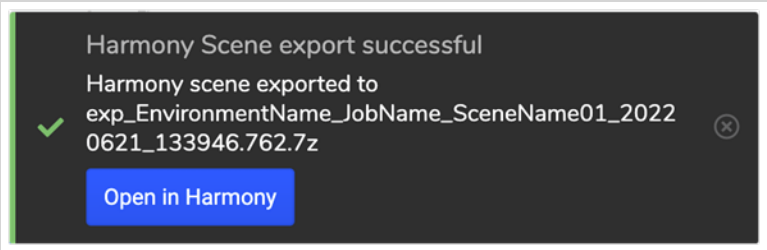
How to open a Scene Directly with the “Open in Harmony” button

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

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

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

1. Export a scene offline.
2. Click on the Open in Harmony button available on the pop-up message or in the Notification Feed:



The Producer Link Open Offline Scene dialog opens.

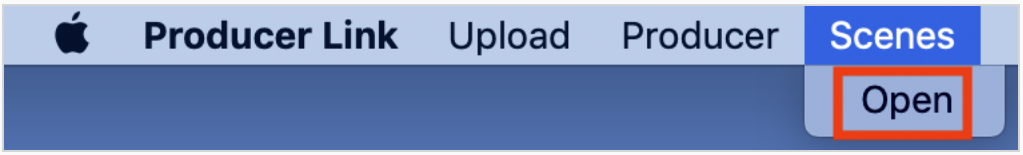
> **WARNING**
>
> Producer displays this message when Harmony informs it that the export request has been processed. However, it might take a little while until the exported package is actually received in the user's exported Exchange folder.
>
> Clicking on this button before the export has been received will instruct Producer Link to wait for this export before opening the scene.

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

How to open a scene later, using Producer Link

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

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

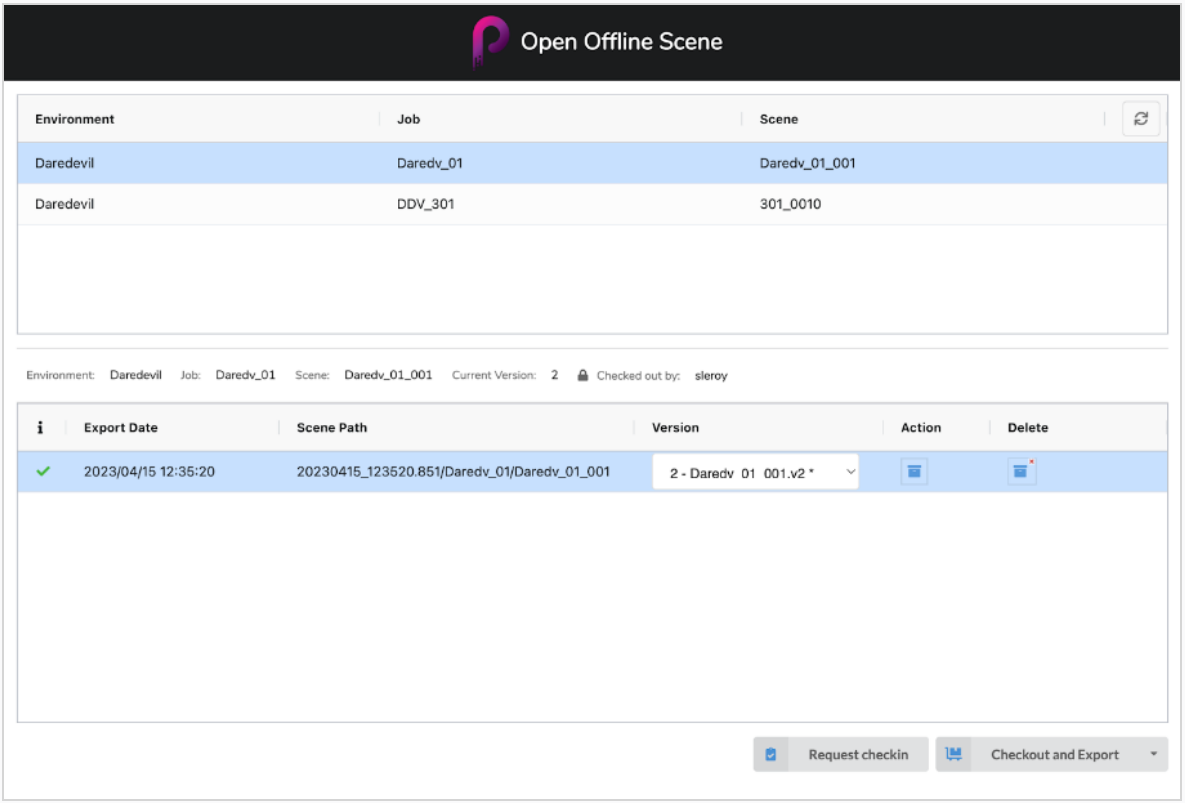


The Producer Link Open Offline Scene dialog opens.

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

How to open a scene from the Open Offline Scene dialog

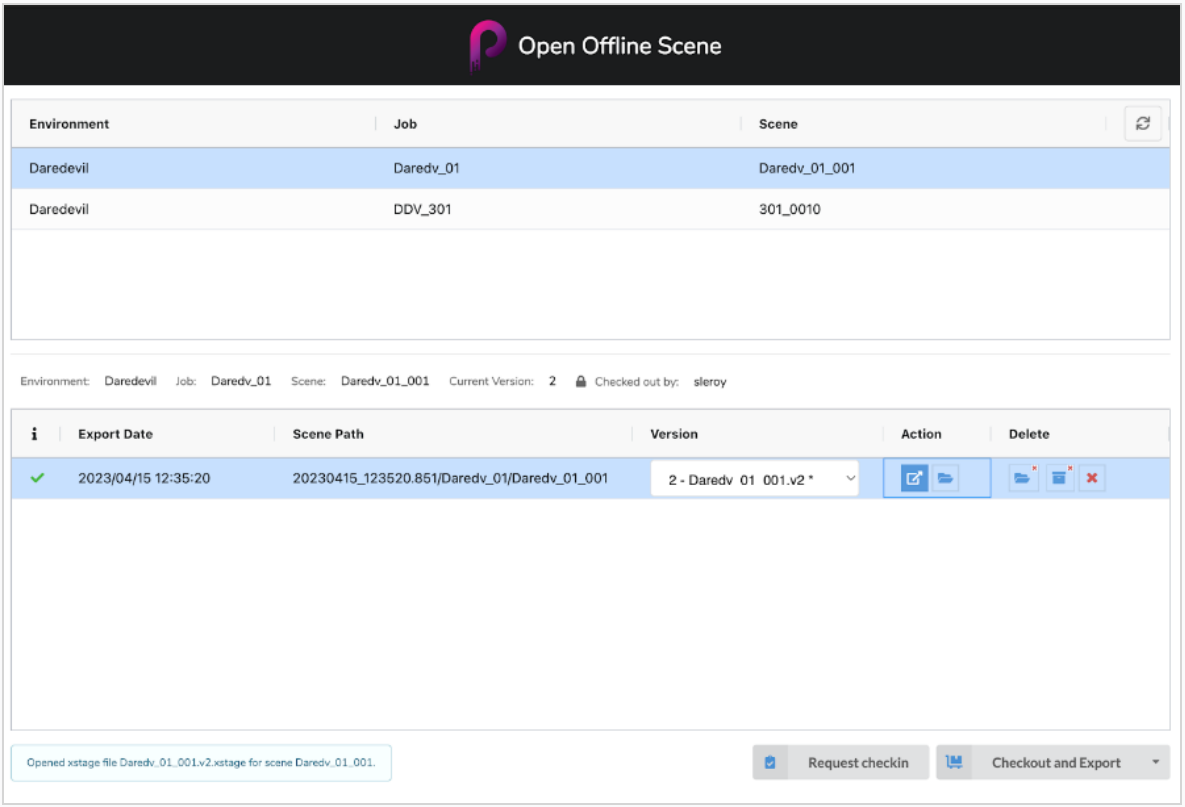
1. In the top section, click on the scene you want to open.



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

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

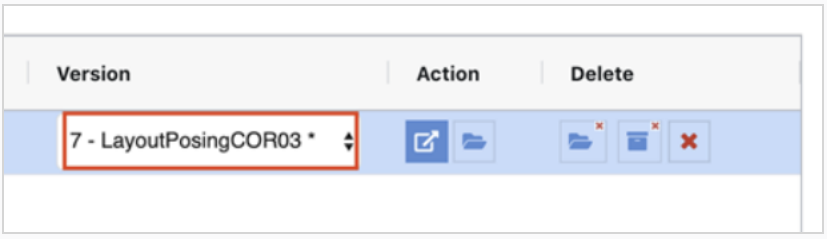
2. Click on the button to unzip and open the file.



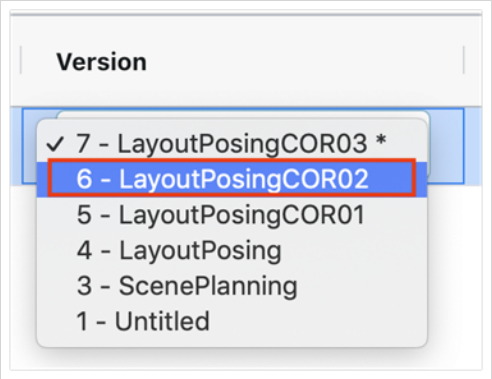
How to select a particular scene version

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

1. Click on the version drop-down.



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



NOTE

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

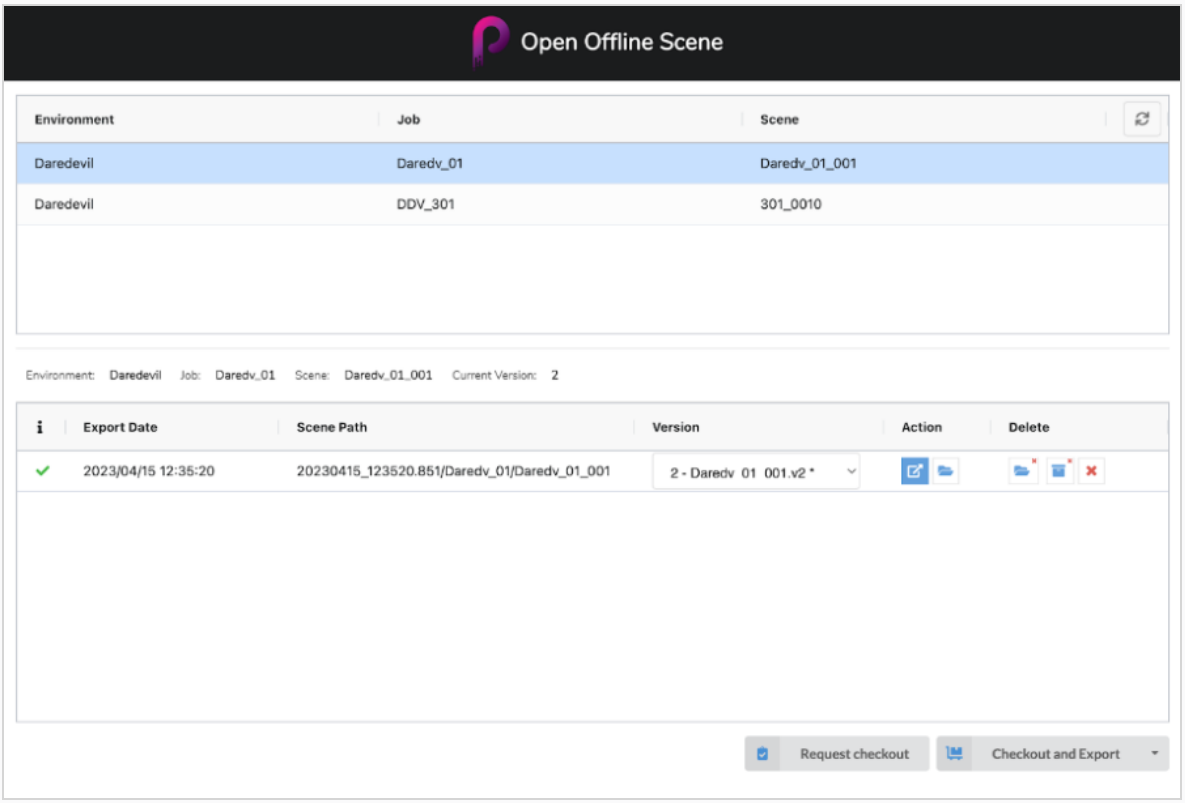
How to check out a scene

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

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

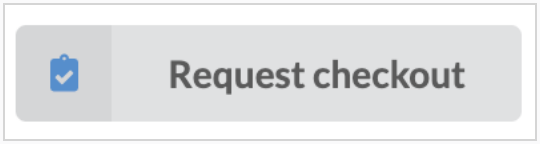
Both situations are handled in the "Open Offline Scene" dialog of Producer Link.

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

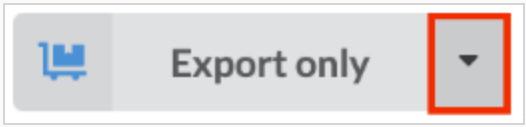


2. Choose one of 2 options:

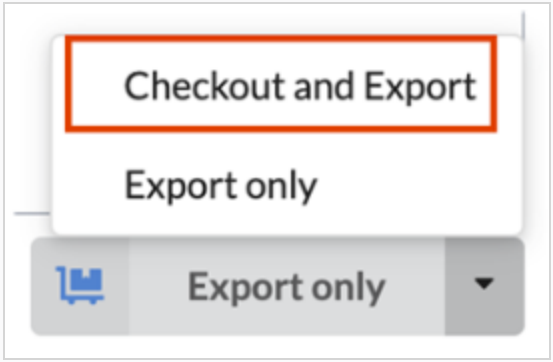
   - Click on the "**Request checkout**" button to simply checkout the scene:



   - Select "**Checkout and Export**" from the right-most dropdown button:



=>

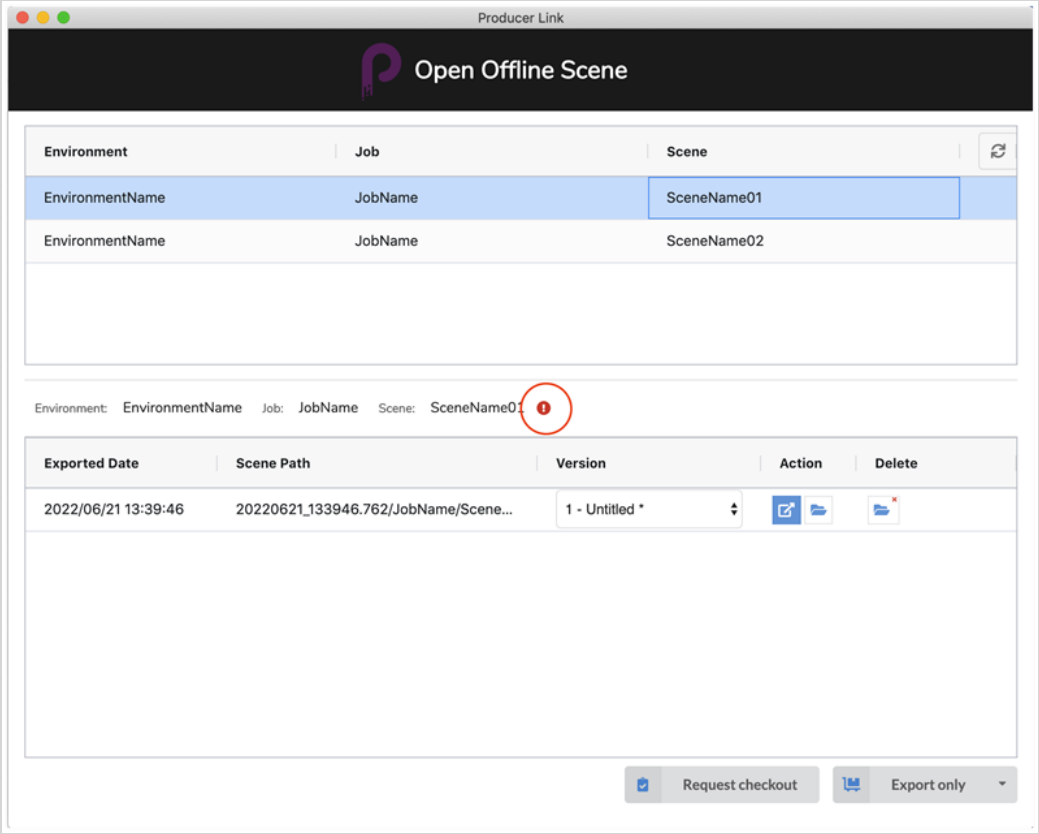


NOTE

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

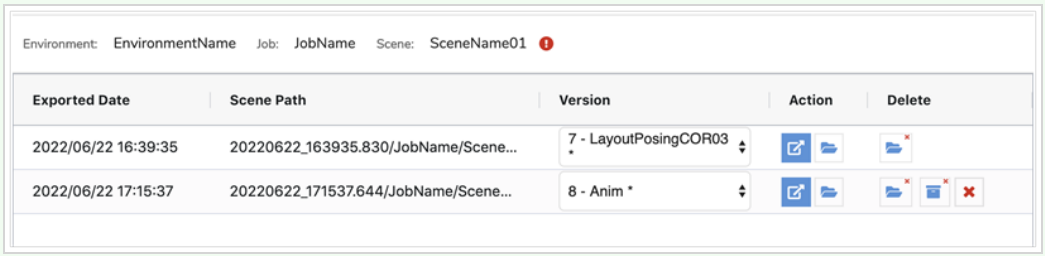
NOTE

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



NOTE

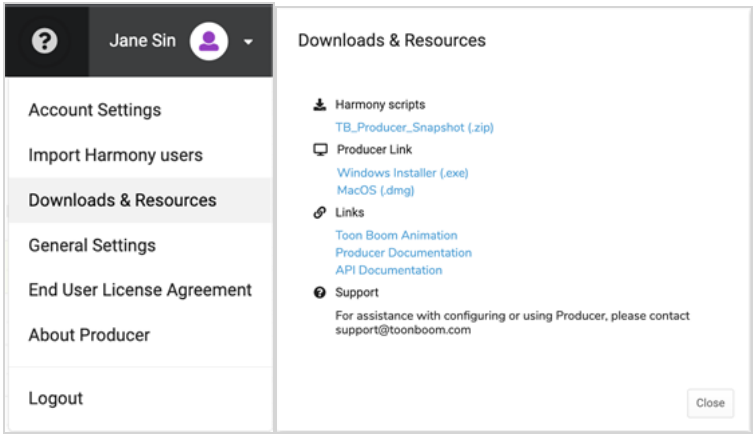
If the scene was exported more than once, every export will be listed in the lower section. It will be important to look closely at the export date to ensure you are using the right one.



Harmony Scripts

Producer offers a set of Harmony scripts which can be used to upload previews and update tasks status in Producer, as well as communicate with Harmony Database.

Those scripts can be downloaded from Producer's User Guide > Downloads & Resources top right menu.



The same scripts are used when working in Harmony Standalone or Database mode (both on site and remotely), with a few variations depending on the usage.

Once uncompressed, the downloaded package contains the following files:

README.md	A simple text file that shortly explains the package contents.
TB_Producer_SceneSnapshot.js	The main script to use when dealing with a Producer **scene**.
Scene_Snapshot_Light_Icon.png	A default (light) icon when setting a shortcut in Harmony for the scene snapshot script.
Scene_Snapshot_Dark_Icon.png	A default (dark) icon when setting a shortcut in Harmony for the **scene** snapshot script.
TB_Producer_AssetSnapshot.js	The main script to use when dealing with a Producer **asset**.
Asset_Snapshot_Light_Icon.png	A default (light) icon when setting a shortcut in Harmony for the **asset** snapshot script.
Asset_Snapshot_Dark_Icon.png	A default (dark) icon when setting a shortcut in Harmony for the **asset** snapshot script.
TB_Producer_Snapshot.ui	Defines the script layout (required by both Scene and Asset scripts).

TB_Producer_ BatchRenderSnapshot.js	A script used only on Harmony Database side when delegating the rendering and uploading the preview to Harmony render farm.
TB_Producer_SnapshotUtilities.js	A utility script (required by both Scene, Asset and Batch render scripts).
TB_Producer_NodeSnapshot.js	A utility script (required by both Scene, Asset and Batch render scripts).

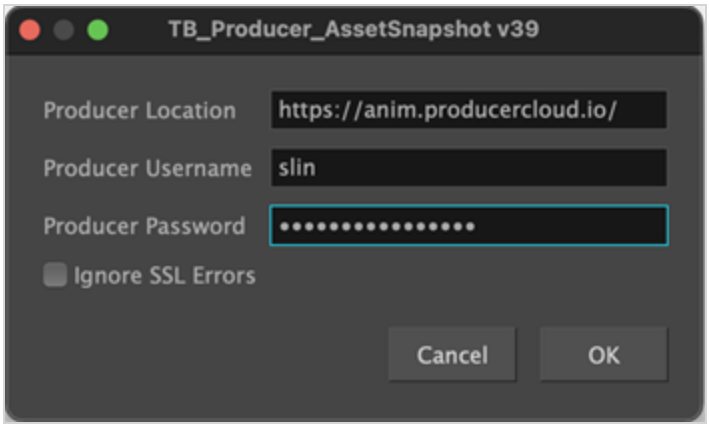
NOTE

Producer Harmony scripts use Harmony's Scripting API whose documentation can be found in Harmony User Guide > Scripting section.

Harmony scripts locations can be found in Harmony User Guide > Scripting > Creating Scripts section.

Interface

Login



Producer Location	The main address of Producer website
Producer Username	Same username as in Producer Login
Producer Password	Same password as used in Producer
Ignore SSL Errors	Check only if connecting to an on-premise version of Producer, using self-signed certificates. Do not check if connecting to Producer Cloud.

NOTE

In order to successfully login to Producer from Harmony scripts, you'll need to first log into Producer's Web Interface from the same machine.

Main Dialog

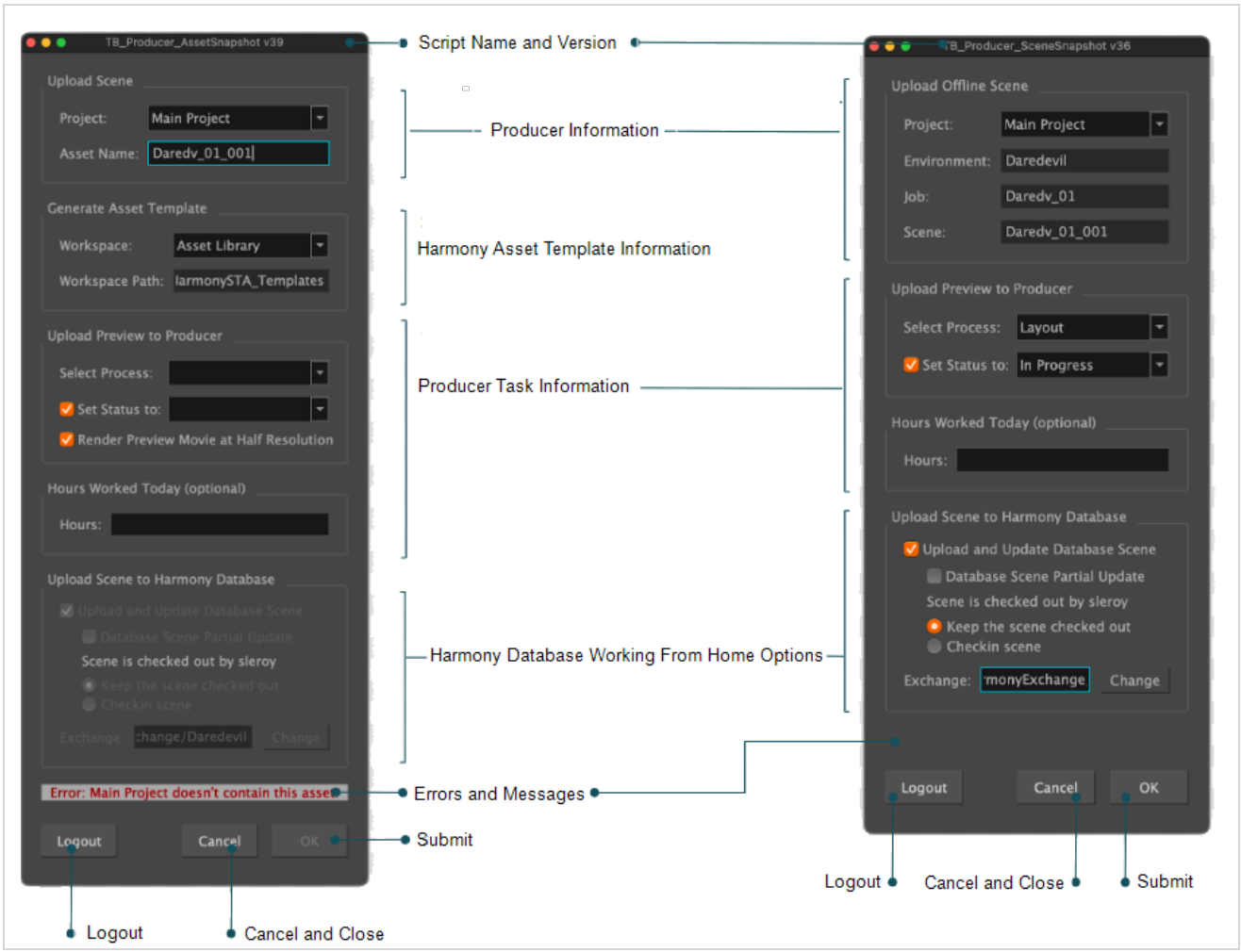
The general layout of the main dialog is the same, whether we deal with a Producer **scene** or **asset**, or work on a Harmony **Standalone** or Harmony **Database** scene (connected directly to the Harmony Server or working remotely).

The following shows the general (and most complex) structure of the main dialog.

NOTE

Although Harmony only deals with **scenes**, one major difference between “scenes” and “assets” is that assets are bundled into **Harmony templates** placed in an **asset library** to be later imported into scenes.

Producer makes a clear distinction between **scenes** and **assets**, to facilitate this association via the assembly process.



1. **Script name and version:** identifies the script being run, and the version of that script:
    - TB_Producer_SceneSnapshot.js for Producer scenes
    - TB_Producer_AssetSnapshot.js for Producer assets
2. **Producer Information**

a. When dealing with Producer **scenes**, this section will show three separate fields for **Producer** environment, job and scene corresponding to the opened Harmony scene.

> **NOTES**
>
> **Harmony Database** environment, job and scene must match Producer's to automatically match Harmony scene in Producer.
>
> When dealing with a **Harmony Standalone** scene, the user will be required to enter Producer's environment, job and scene. These entries will be remembered next time the script is launched.

b. When dealing with Producer **assets**, this section will expose one field, prompting the user to enter Producer's corresponding **asset name**. The script will remember that asset name for the next time it is launched.

3. **Harmony Template Information**

   This section is present when uploading **assets** using **TB_Producer_AssetSnapshot** script.

   The user will be prompted to select a **workspace**, where the Harmony template (.tpl file) shall be saved.

   > **NOTES**
   >
   > The list of workspaces is configured in Producer Link Settings screen. A location to a template library is expected to be present in all configurations, whether you're working with a Standalone, Server or Offline scene.

4. **Producer Task Information:** This section deals more specifically with updating Producer.

   - "Select Process" prompts the user for their assigned task process. A preview (snapshot) of the scene/asset will be generated and uploaded to Producer for that process.
   - (Optional) "Set status to" allows updating the task's status directly from the script
   - (Optional) "Render half resolution" allows generating the preview at half resolution, for faster rendering and previewing (as well as saving space) in Producer
   - (Optional) Work hours: Allows updating hours worked on that task. Work hours will be recorded for the current day.

5. **Harmony Database Working From Home options** will only be displayed when opening an **offline** (remote) Harmony Database scene.

- **Upload and Update database scene**: Check this option if you wish to upload your work to Harmony server. If left unchecked, only Producer will be updated with the preview snapshot and task status update.
- **Database scene partial update**: When selecting this option Harmony will compare local Harmony files to those that were downloaded offline, and only upload the changes to Harmony, resulting in a much faster upload.

IMPORTANT

This option is only available with Harmony >= 22.0.3

Scene is checked out by: Will only be displayed if a scene is currently checked out. The two following options are only available if the scene is currently checked out by the current user.

- **Keep the scene checked out**
- **Checkin scene**

Exchange: This is the location to the Exchange folder (same as Producer Link > Settings > Cloud Exchange Folder). Harmony will create a compressed archive containing all scene artifacts to be updated in Harmony Database in a user specific folder, which WebCC will grab at the other end.

How Tos

Locating Harmony Scripts

For **Harmony Standalone/Offline**:

- Windows: C:\Users\[username]\AppData\Roaming\Toon Boom Animation\Toon Boom Harmony Premium\[version]-scripts
- macOS: /Users/[username]/Library/Preferences/Toon Boom Animation/Toon Boom Harmony Premium/[version]-scripts
- GNU/Linux: /home/[username]/Toon Boom Animation/Toon Boom Harmony Premium/[version]-scripts

For **Harmony Server**, under the following hierarchy:

- User: /USA_DB/users/[username]/Harmony Premium/[version]-scripts
- Job: /USA_DB/jobs/[job_name]
- Environment: /USA_DB/environments/[environment name]
- Global: /USA_DB/scripts

TIP

Harmony Scripts locations can be found in Harmony User Guide > Scripting > Creating Scripts section .

Installing Producer Harmony Scripts

The following procedure applies to Harmony Standalone or Database modes alike.

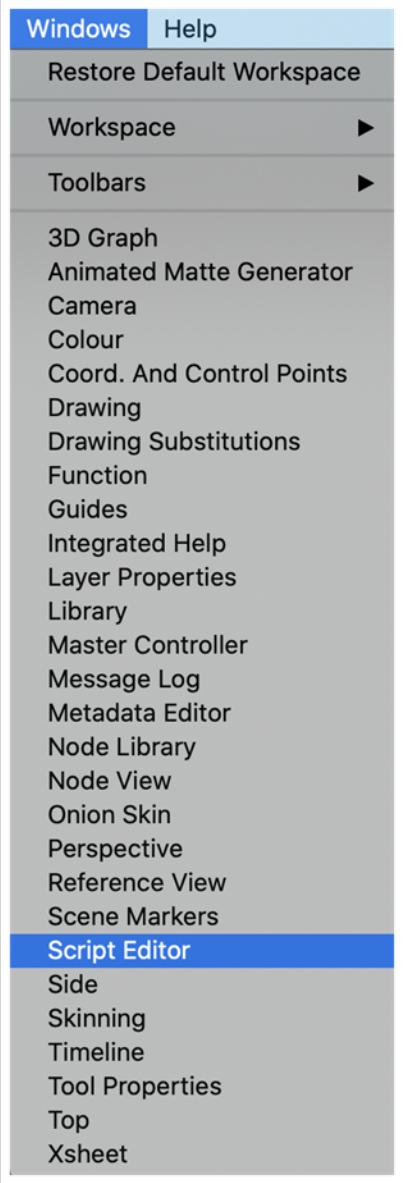
In **Database mode**, it is possible to install the scripts at different levels (Global, environment, job, scene or user level). Installing the scripts at a global level will save Harmony users the trouble of installing the scripts themselves.

After downloading and uncompressing the scripts from Producer:

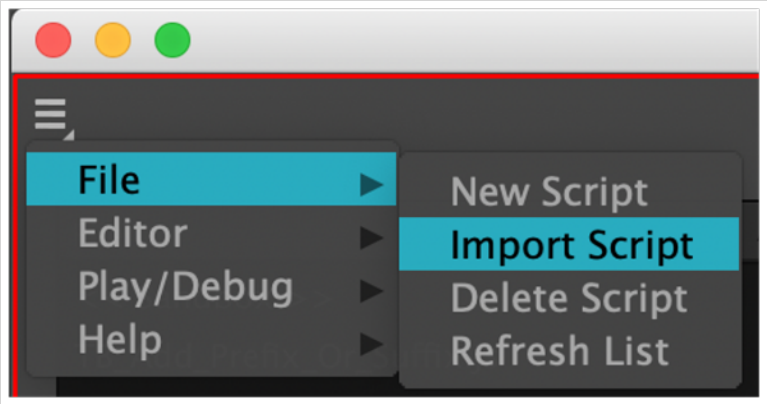
NOTE

An alternative method is to copy the scripts directly into their destination script folder as described in the Updating Scripts section below.

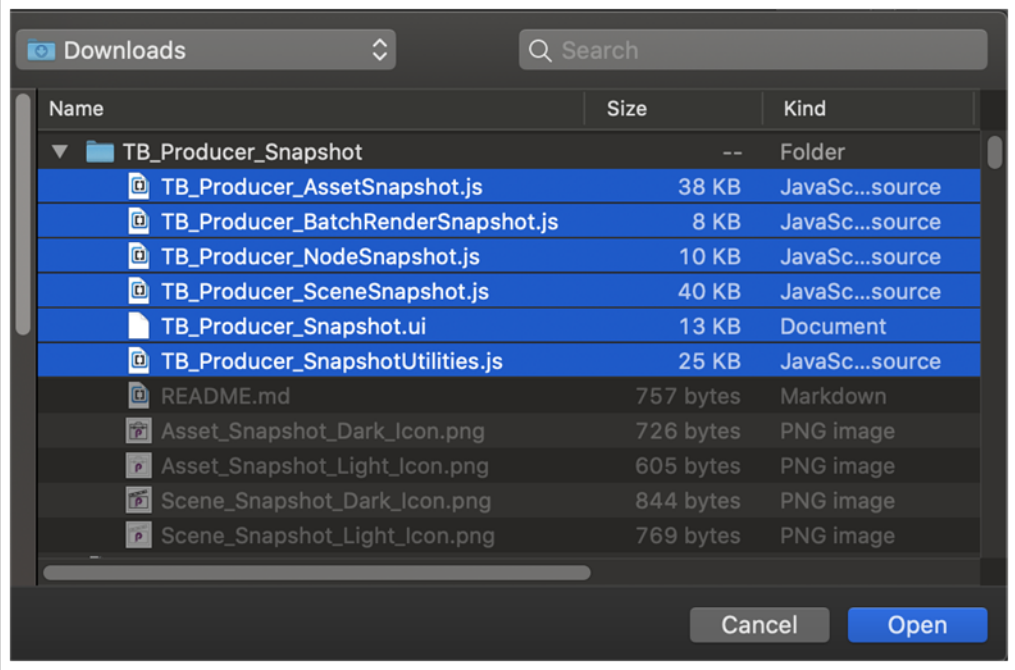
1. Open a scene in Harmony
2. In Harmony, under "Windows", open the "Script Editor".



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



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



NOTE

TB_Producer_BatchRenderSnapshot.js needs only be installed on Harmony server side.

You should answer "User" six times to the question "Where would you like to save ..."

Updating Scripts

If the Harmony scripts have to be updated, you can simply replace the old scripts with the updated ones.

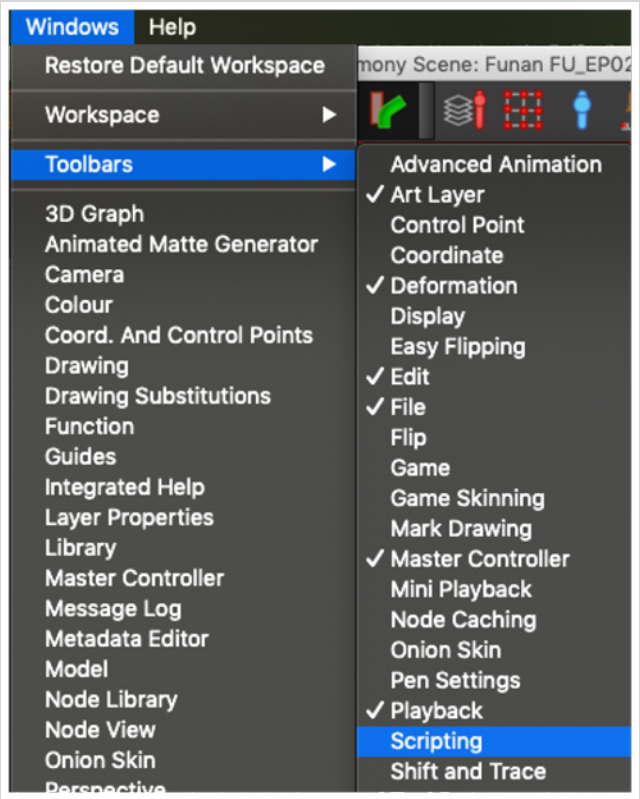
1. Locate the scripts for your Harmony configuration (see Locating Harmony scripts)
2. Uncompress and copy the updated scripts to their destination folder in Harmony.
3. Click on the “Refresh Script File List” in the Script Editor tab.

> **NOTE**
>
> Although Harmony offers an interface to delete scripts , it is not possible to delete all files, and it is therefore simpler to replace them directly and refresh.

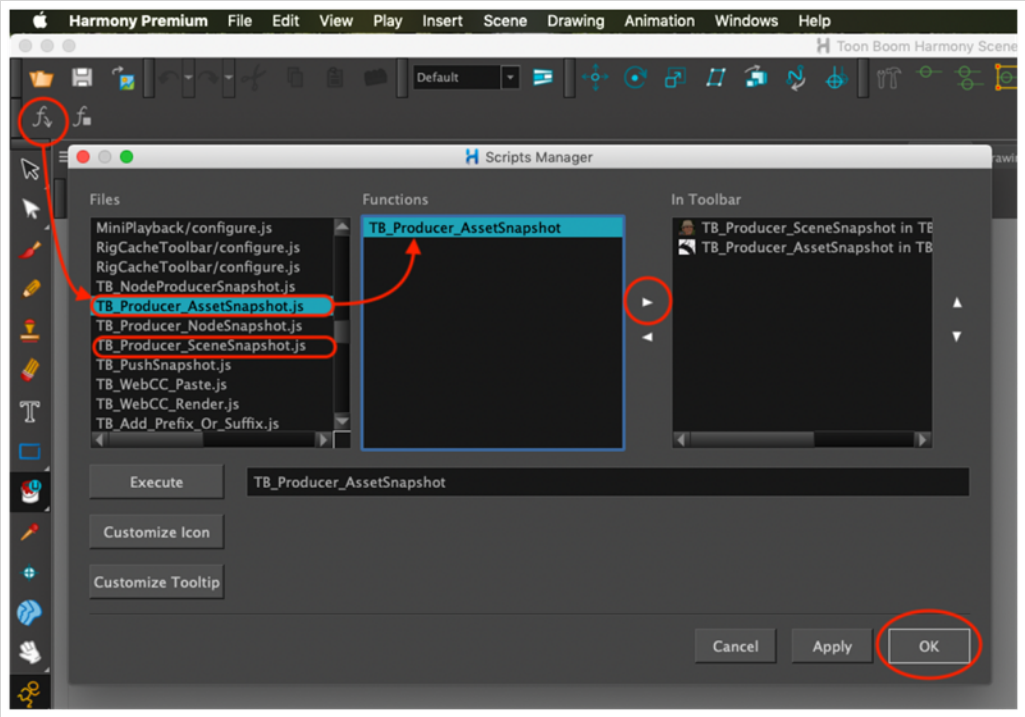
Configuring Shortcuts

After installing Producer scripts, we can set up shortcuts for quick access using Harmony Scripting Toolbar.

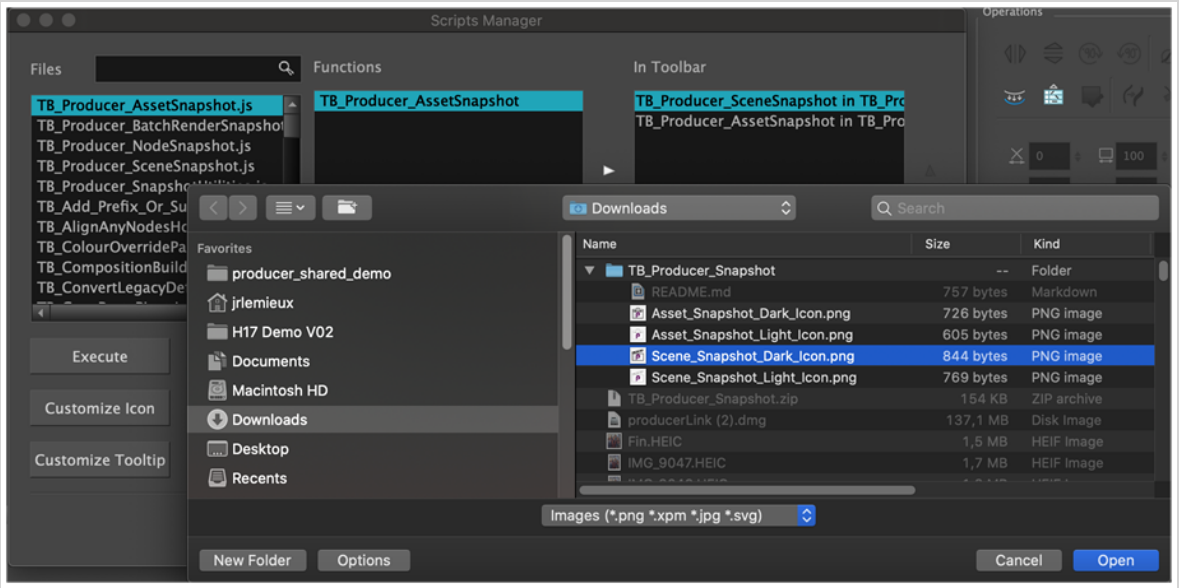
1. Add the script toolbar



2. Add the TB_Producer_SceneSnapshot & TB_Producer_AssetSnapshot scripts.



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



4. The scripts can now be launched from any scene by clicking on the appropriate icons.

After you have completed the work you had to do on a scene, it is now time to render it, submit it for approval, log the hours you spent on it and to push the result back to the server (when working with

Harmony Database). Fortunately, all of these operations can be combined in one, using the Harmony snapshot scripts.

After a standard login procedure, the user will be shown an upload dialog, whose options vary depending on the configuration (scene or asset, Harmony Standalone, Database or Remote), while still remaining very similar.

However, each scenario here will be addressed independently, so that you may refer to the specific case.

Logging In

When starting either TB_Producer_SceneSnapshot.js or TB_Producer_AssetSnapshot.js script, you will first need to login.

1. Log in to Producer **Web** interface.

   This step is necessary to “register” your machine and allow Harmony Scripts to communicate with Producer.

2. Launch either TB_Producer_SceneSnapshot.js or TB_Producer_AssetSnapshot.js script.
3. When prompted, enter the address of Producer (eg: https://your-studio.producercloud.io), your Producer username and password, then click “OK”

You should now be logged in.

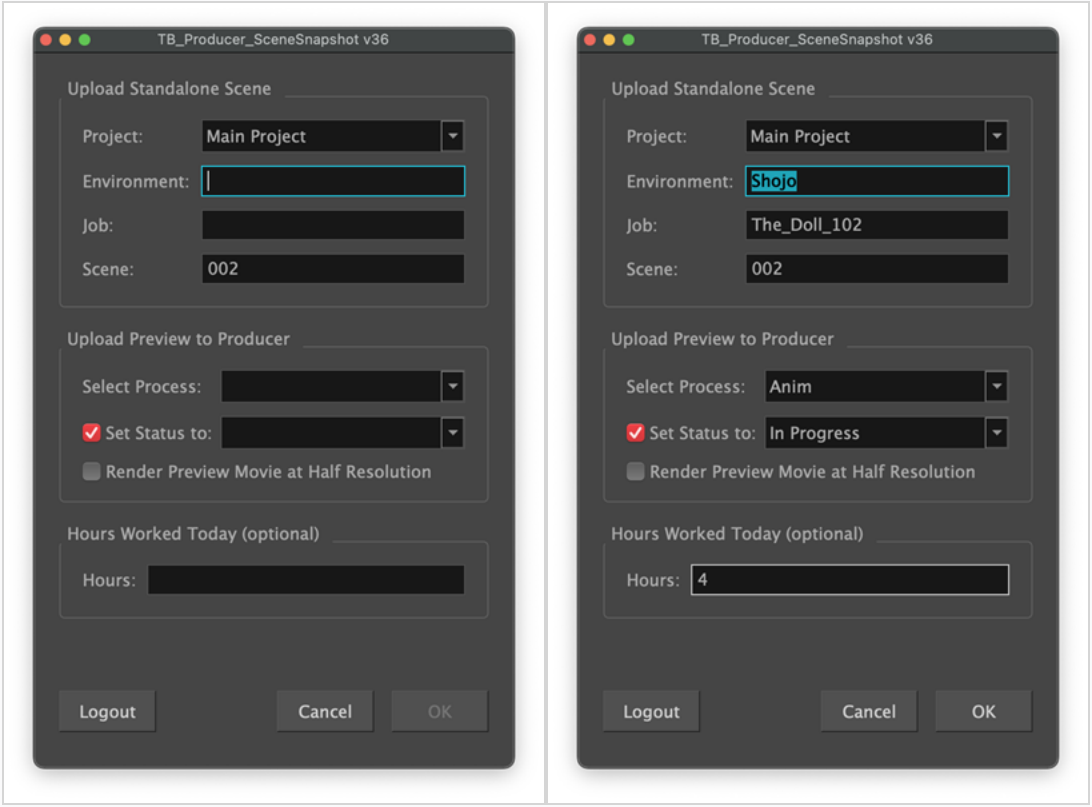
> **NOTE**
>
> You will not be prompted again next time you open the scripts.

Uploading a Standalone Scene

> **NOTE**
>
> Ensure that a valid workspace has been set in Producer Link > Settings page to locate the standalone scene’s path relative to that workspace.

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

2. In **“Upload Standalone Scene”** section, enter the Producer scene information (Project > Environment > Job > Scene), starting with the Project.



NOTE

An error message will be displayed at the bottom of the dialog if the scene cannot be found at the project, environment, job or scene level, and every other field will be grayed out, e.g.:

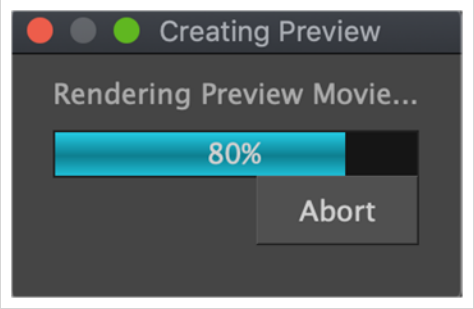
Check the correct information in Producer.

These choices will be remembered the next time you open the scripts (after a successful upload).

3. **“Upload Preview to Producer”:**
    a. Select the task process and (optionally) the new task status.
    b. (Optional) Select whether to render the preview at full or half resolution.
4. (Optional) Enter the number of hours worked on that scene (that day).

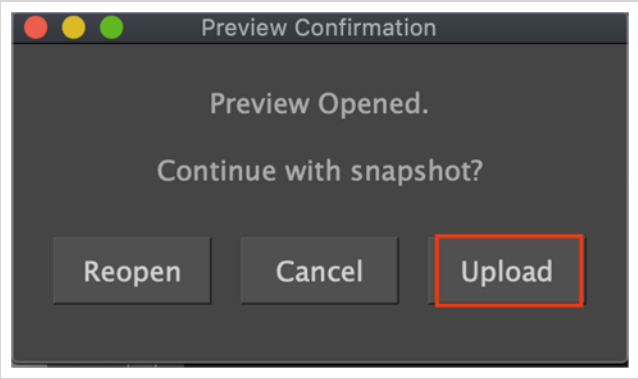
5. Click on the **OK** button.

   The Create Preview progress bar appears.

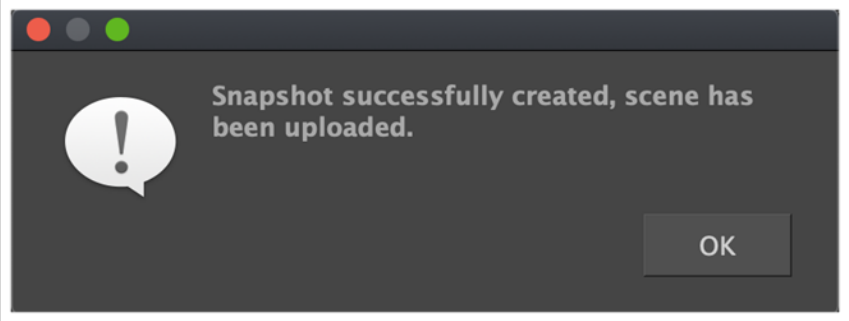


   Once the render is completed, a movie preview opens and a dialog appears.

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



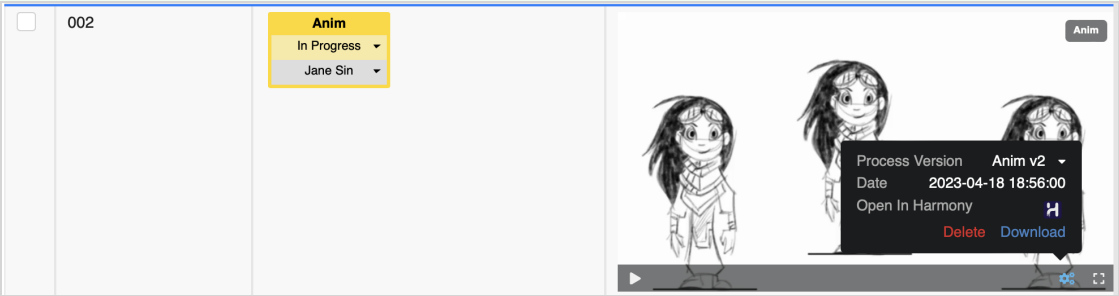
   If the upload was successful, you will get a confirmation.



NOTE

Producer will process the snapshot in the background in order to generate a web-optimized thumbnail and preview.

Once completed, the task will be updated in Producer as well as the uploaded preview.



Provided that the scene workspace has properly been set, the preview details will allow reopening that specific version of the scene.

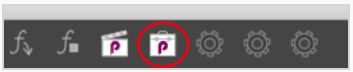
Note that “v2” is the version of the Producer snapshot (i.e.: the second snapshot uploaded for that scene process, and not the Harmony scene version).

Uploading a Standalone Asset

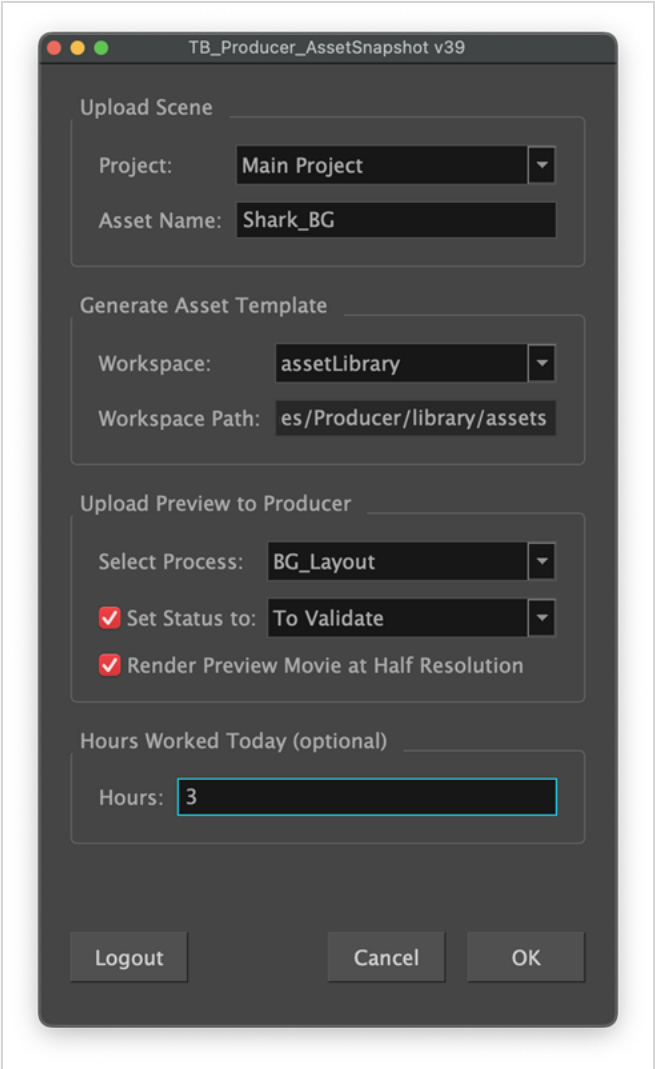
NOTE

Ensure that a valid **workspace** has been set in Producer Link > Settings page to locate the path to the **standalone scene** relative to that workspace, as well as the path to the output **template library**.

1. Launch the TB_Producer_AssetSnapshot.js script, using the AssetSnapshot icon.



2. Login if necessary
3. In “**Upload Scene**” section, enter the Producer **asset** information (Project > Asset Name), starting with the Project.



NOTES

An error message will be displayed at the bottom of the dialog if the scene cannot be found at the project, environment, job or scene level, and every other field will be grayed out, e.g.: "Error: Main Project doesn't contain this asset!"

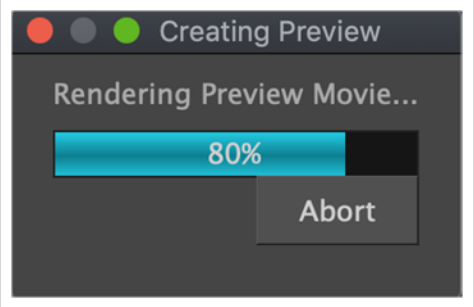
Check the correct information in Producer (Open Tasks or Assets page).

These choices will be remembered the next time you open the scripts (after a successful upload).

4. "**Generate Asset Template**": Select a workspace in the "Workspace" dropdown (The path to that workspace is indicated underneath.

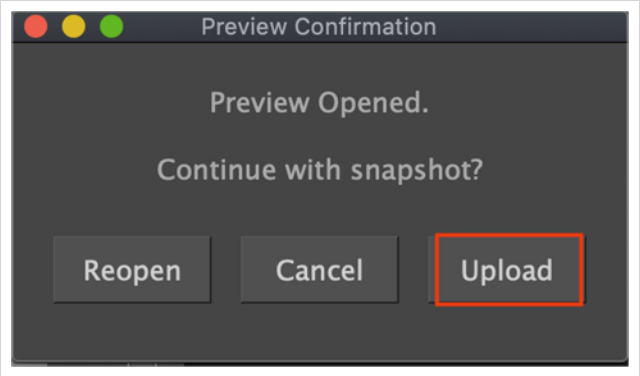
5. Select the Task process and optional status, choose whether to render the preview at full or half resolution.
6. (optional) Enter the number of hours worked on that scene (that day).
7. Click on the **OK** button.

   The Create Preview progress bar appears.

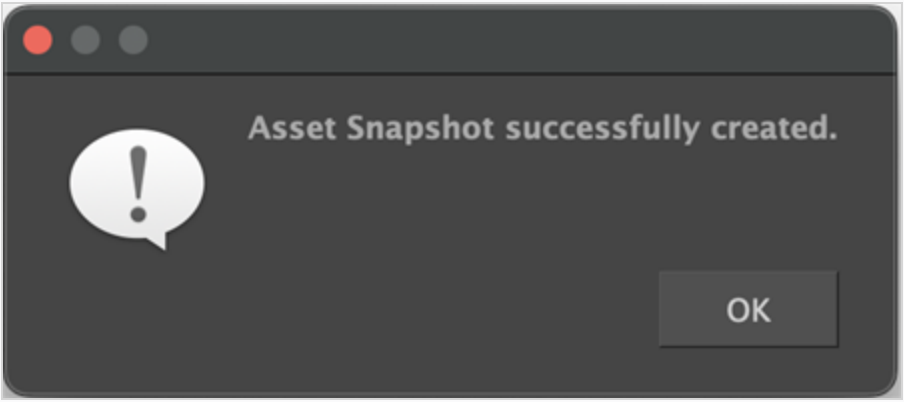


   Once the render is completed, a movie preview opens and a dialog appears.

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



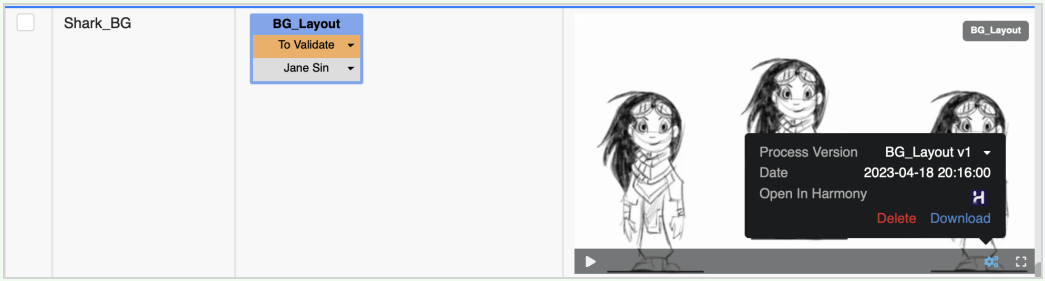
   If the upload was successful, you will get a confirmation.



NOTES

Producer will process the snapshot in the background in order to generate a web optimized thumbnail and preview.

Once completed, the task will be updated in Producer as well as the uploaded preview.



Provided that the **Harmony scene workspace** was properly set, the preview details will allow reopening that specific version of the asset in Harmony (Note that “v1” is the version of the Producer snapshot, i.e.: the second snapshot uploaded for that scene process, and not the Harmony scene version).

Provided that the Harmony **template library workspace** was properly set, the template will be found under <template workspace>/<scene name>/<scene_name>[_number].tpl

Uploading a Harmony Database Scene

IMPORTANT

When working directly with Harmony Database, scripts may be installed at a global level by an administrator. In such cases, users need to configure the shortcut icon directly. Ensure that a valid workspace has been set in the Producer Link > Settings page to locate the path to the **standalone scene** relative to that workspace, as well as the path to the output **template library**.

NOTE

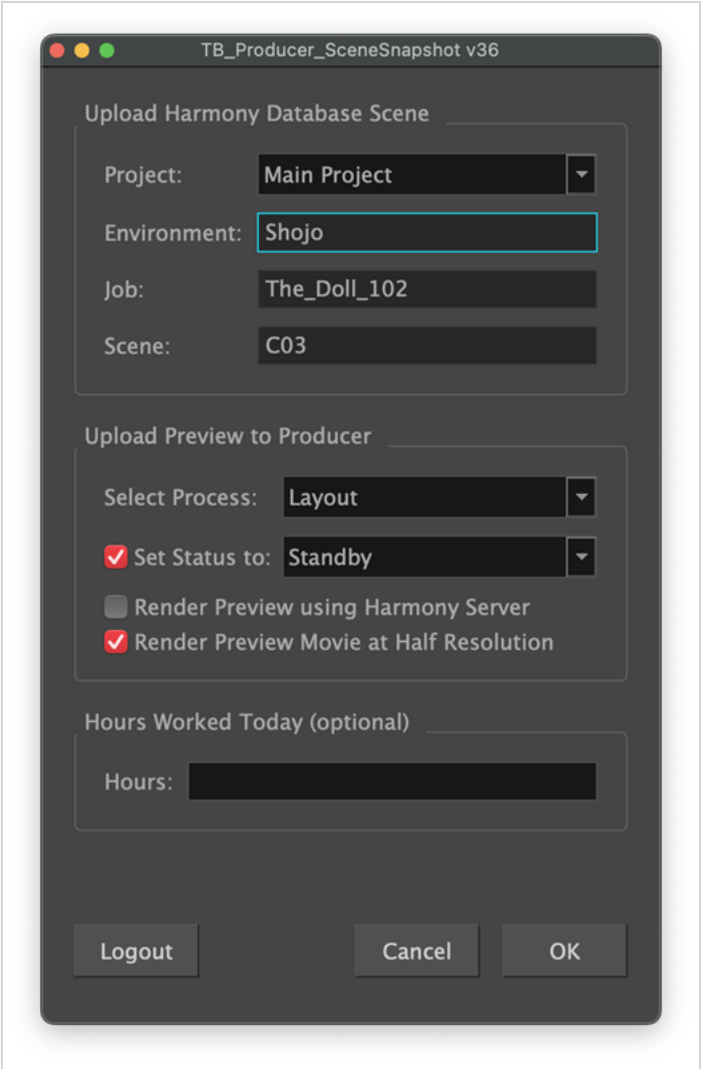
When working directly with Harmony Database, scripts may be installed at a global level by an administrator, or at the user level by the users themselves..An error message will be displayed at the bottom of the dialog if the scene cannot be found at the project, environment, job or scene level, and every other field will be grayed out, e.g.: “Error: Main Project doesn’t contain this asset!”

Check the correct information in Producer (Open Tasks or Assets page).

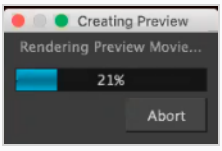
These choices will be remembered the next time you open the scripts (after a successful upload).

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

2. In “**Upload Harmony Database Scene**” section, the Environment, Job and Scene should be automatically populated based on Harmony environment, job and scene

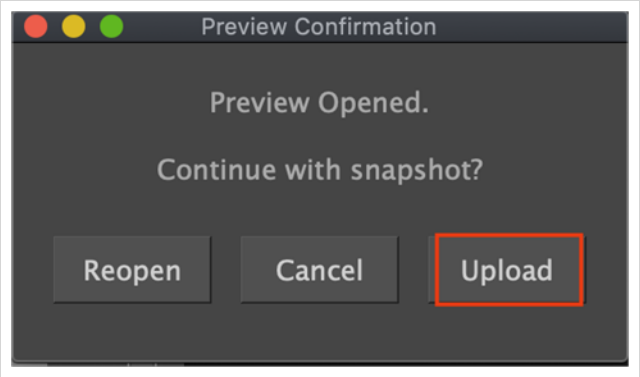


3. Set the Process and Status, as well as work hours
4. Choose whether to Render at full or half resolution
5. Click OK.
6. The Create Preview progress bar appears.

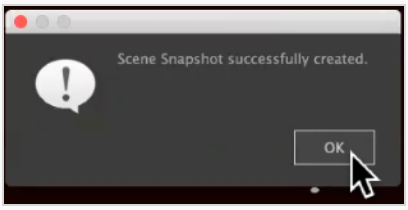


Once finished, the Preview Confirmation window opens.

7. Click Upload to send the snapshot (preview) to Producer.



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



About "Render Preview using Harmony Server"

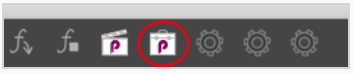
When this option is selected, a confirmation message will be displayed immediately after clicking OK (step 5).

Harmony will take care of rendering the scene preview, uploading the snapshot to Producer and updating the task's status and work hours.

This operation will be performed according to Harmony render queue priority and the user will not be notified of its completion.

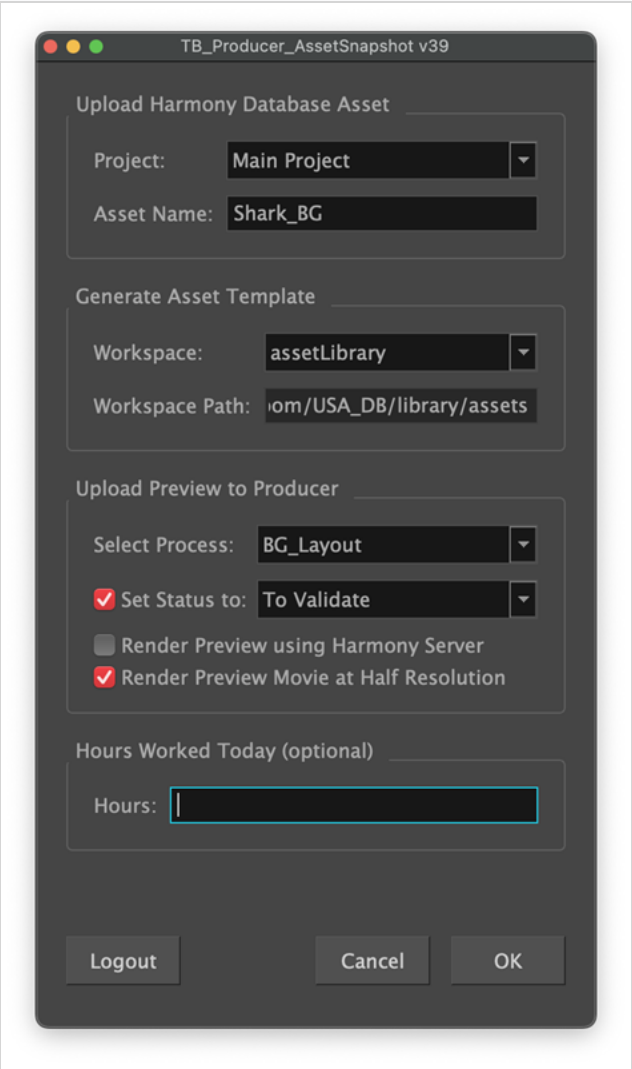
Uploading a Harmony Database asset

1. In Harmony, make sure your Harmony snapshot scripts are installed and launch the TB_Producer_AssetSnapshot script by clicking on its icon.



   The TB_Producer_AssetSnapshot dialog box appears and you may be prompted to login to Producer if you are not already.

2. Complete the login to Producer if necessary.
3. In the TB_Producer_AssetSnapshot dialog box, from the Project drop-down menu, select the project in which you would like to create the template file.



4. In the Asset Name field, type in the name of the asset.
5. In the Process drop-down, select the task/process for which you want to upload this preview of the template.
6. Click on the Set Status checkbox if you would like to set the status of the task/process. If you check this box, from the Set Status drop-down menu, select the status that you would like to update the status of the task/ process to.
7. In the Workspace field, select a workspace where the template (.tpl) for the current scene will be generated and stored. The workspace is defined in /USA_DB/workspace.json.

   If no Workspace is specified, the template will be placed in /USA_DB/library/assets/env_name/job_name/asset_name.
8. Click OK.

A template of the whole scene is generated in Harmony AND preview of the asset is pushed to Producer.

Uploading an Offline Scene

1. Follow steps 1 through 4 of Uploading an Harmony Database scene
2. Choose Harmony Upload Options
    a. If the scene was checked out by the current user, choose whether to check it in
    b. Choose whether to perform a full or partial scene upload.

> **NOTE**
> Partial upload will greatly improve the speed of the update, especially for bigger scenes. It is only available with Harmony 22.0.2 and over.

    c. (Only the first time) Set up the exchange folder path by clicking on the Change button.

> **TIP**
> The exchange path is the same as the one setup within the Settings page of Producer Link.

3. Click OK

Uploading an Offline Asset

1. Follow steps for Uploading an Harmony Database asset

> **NOTE**
> Make sure that the workspace for the template is shared with Harmony Server..

2. Choose Harmony Upload Options
    a. If the scene was checked out by the current user, choose whether to check it in
    b. Choose whether to perform a full or partial scene upload.

NOTE

Partial upload will greatly improve the speed of the update, especially for bigger scenes. It is only available with Harmony 22.0.2 and over.

c. (Only the first time) Set up the exchange folder path by clicking on the Change button.

TIP

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

3. Click OK

Chapter 10: Reviewing

Reviewing is the process of watching, reviewing, approving, and providing retakes to preview movies for scenes submitted by project collaborators after they have completed a task.

Project collaborators are able upload movie previews of the scenes they have worked on in Producer. By loading these movie previews into Producer's review tool, directors, supervisors, and other project administrators are able to do the following:

- Stitch the movie previews of several consecutive scenes into a sequence.
- Play these movie previews
- Stop at, or seek specific frames to examine them
- Add notes to the scene
- Draw annotations over frames in the scene, and add them as attachments to a note
- Approve a scene's task
- Send a scene's task for revisions (retakes)

To use the Review tool, you must create a review session. A session is essentially a container in which you can store a sequence of scenes. Opening the session will load the scenes into the Review tool and allow you to review and annotate them.

There are two types of session:

- **Temporary**: A review session that is created on the go as you send scenes to the review tool from the Production page. Each user can only have one temporary review session. If you already have a temporary review session, creating a new one will overwrite the old one.
- **Permanent**: A review session that is created in the Review tool before sending scenes to it from the Production page. These sessions typically have a specific purpose, such as reviewing the same segment of an episode as its completion progresses. You can create as many permanent review sessions as needed.

NOTE

Reviewing allows you to preview one or several scenes together and is typically used to approve the work of project collaborators on tasks or to send them for revisions. If you only wish to watch the preview movie for a single scene without actually reviewing it, you can play the preview movies for scenes from within the Production page.

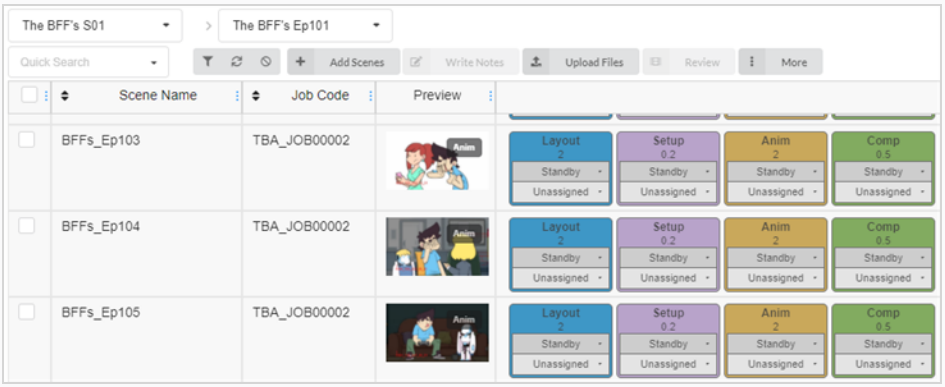
Creating a Temporary Review Session

Temporary review sessions can be created directly from the Production page. Each user can have only one temporary review session at a time, and creating a new one will overwrite the previous one.

How to create a temporary session

1. Open the job in which you want to review one or more scenes.

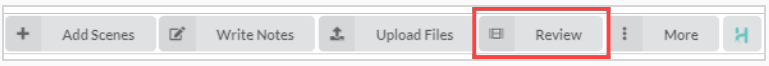
   The Scene list opens.



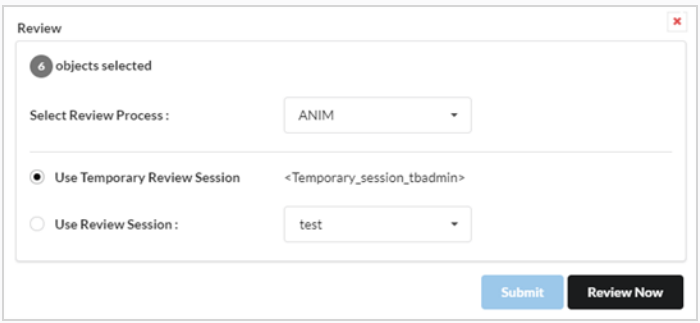
2. In the far-left column, enable the checkbox for each scene that you want to review.

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

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

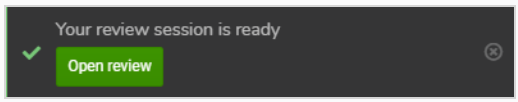


   The Review dialog box opens.



4. In the Select Review Process drop-down menu, select the process (task) that you wish to review. This list will change according to the type of workflow that was created.
5. Select the **Use Temporary Review Session** option.
6. Click Review Now.

   A notification will appear in the bottom-right corner of the interface indicating that the session is ready.
7. Click on Open Review.

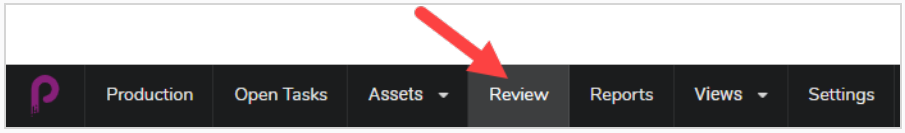


Creating a Permanent Review Session

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

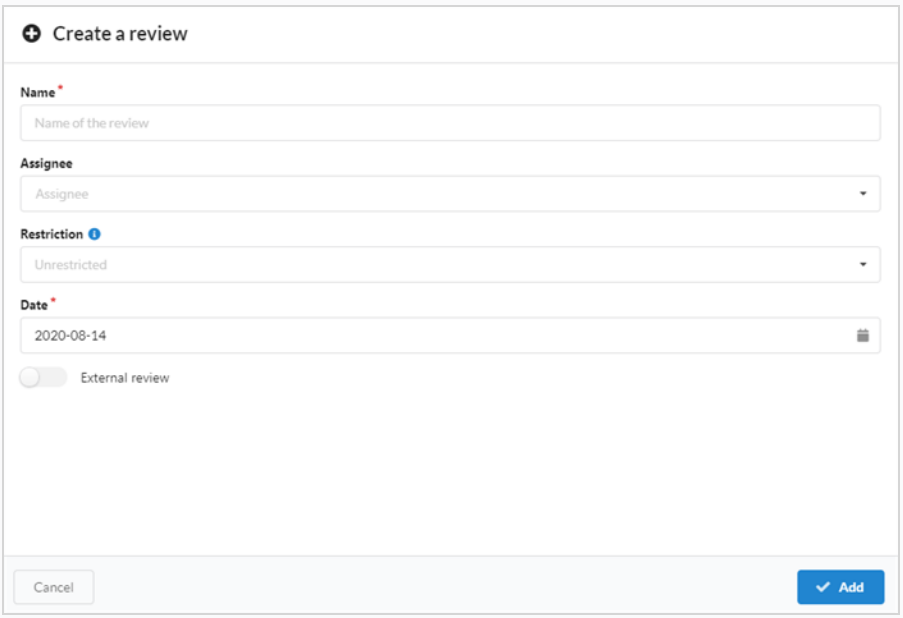
How to create a session

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

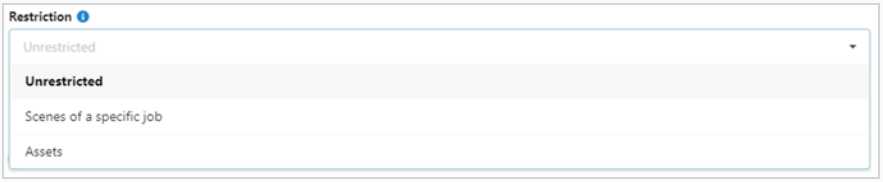


2. In the toolbar at the top of the Review page, select **Create a Review**.

The Create a Review dialog box opens.



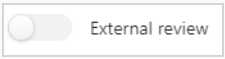
3. In the Name field, name the review session.
4. In the Date field, select the pop-up calendar and the date at which you want the review session to take place.
5. In Assignee field, you can assign the review to a particular user.
6. In the Restriction field, select the type of restriction needed to limits the elements that can be added to this review.



There are three options:

- **Unrestricted**: Anything can be added to the session.
- **Scenes of a Specific Job**: It can be limited to scenes of a specific job which opens more options (Job and Process).
- **Assets**: It can be limited to assets which opens one additional option (Process).

7. To allow external review, enable the **External Review** option. This is added as flag as there is no limitations while using it. It is useful for a client to easily search for reviews meant for them externally.



8. Click **Add**.

The session has now been created.

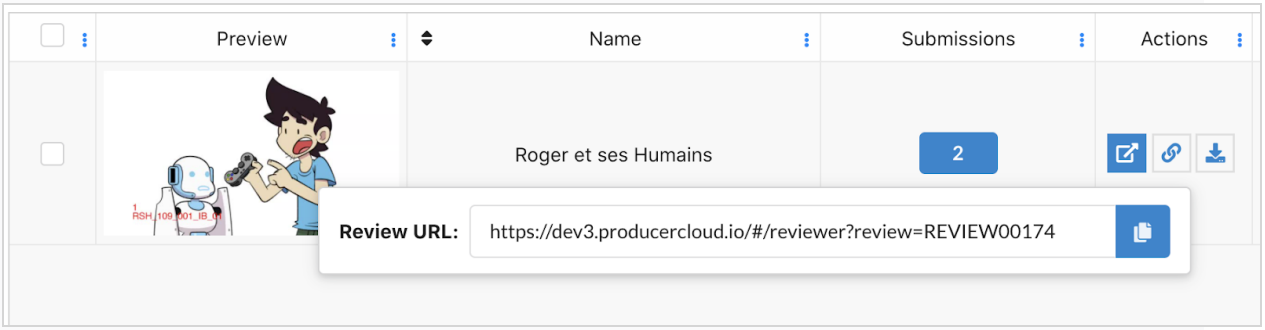
> **NOTE**
>
> Once your session is created, you must add scenes to it.

Sharing Review Session

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

How to share a review session

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



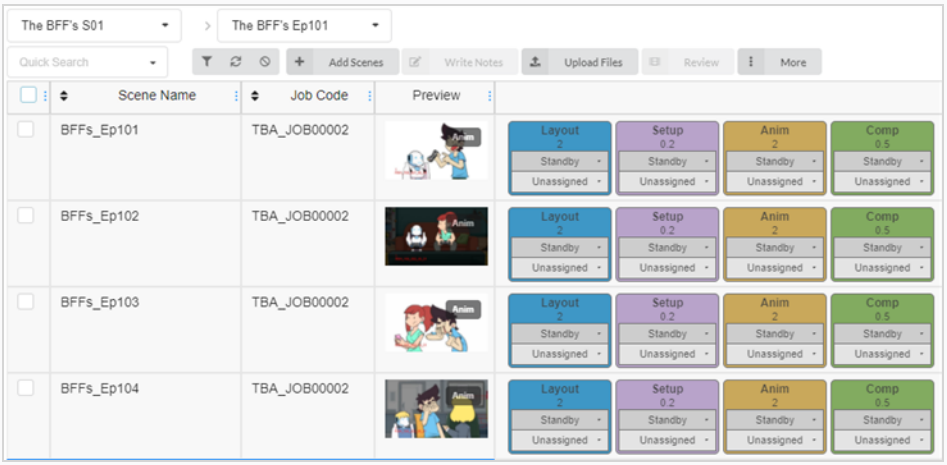
Sending Scenes for Review

Once you have created a session, you can add scenes to be reviewed in it from the Production page. You can add scenes to new sessions, empty sessions, or to sessions that already have scenes in them.

How to add scenes to a session

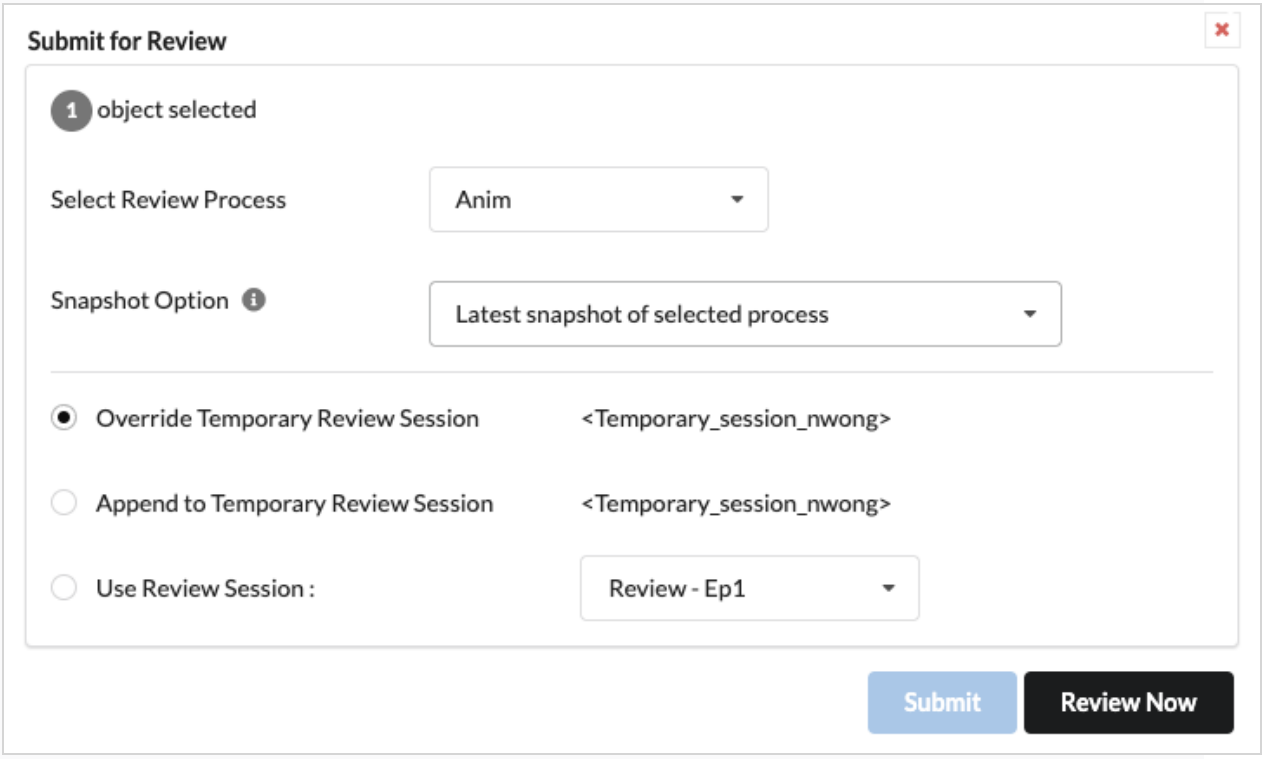
1. Open the job in which you want to review one or more scenes.

   The Scene list opens.



2. Enable the checkboxes on the far left column of the scenes you wish to review.
3. In the toolbar above the scene list, click **Review**.

   The Review dialogue box opens.



4. In the Select Review Process drop-down menu, select the process (task) that you want to review.

   For example, if you want to review the work of a project collaborator on a scene's animation, select the process for "Animation".

5. In the Snapshot Option, choose whether you want to have the latest general snapshot or for the specific process that was selected.

   - **Latest snapshot**: Sends the most recent snapshot, regardless of the process.
   - **Latest snapshot of selected process**: Sends the most recent snapshot if available. Otherwise, it will use the latest snapshot regardless of process.
   - **Latest snapshot of selected process exclusively**: Sends only the most recent snapshot of the selected process and ignores all other snapshots.

6. You can then select where the snapshots will be added.

   - **Override Temporary Review Session**: The current user's temporary session will be deleted and the current selection will become the new content of the Temporary Session.
   - **Append to Temporary Review Session**: Add the snapshots to the end of the current user's temporary session.
   - **Use Review Session**: Choose an existing review session to send the snapshots to.

7. Click **Submit** to send the snapshots and stay on the current page or **Review Now** to go straight to the Review Tool.

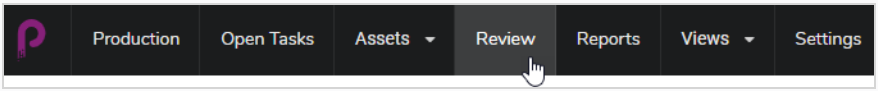
   A notification appears in the bottom-right corner of the page indicating that the session is being updated. When the notification disappears, the session is ready for review.

Filtering a Review Session

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

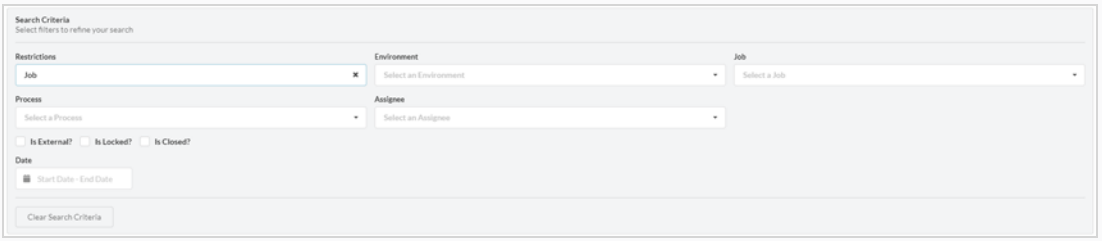
How to filter sessions

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

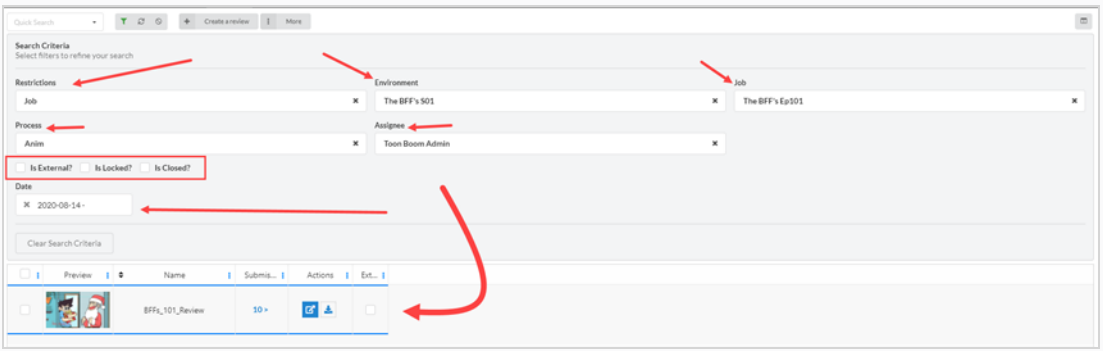


2. In the Review page, click the Toggle Search Panel button at the top right of the page.

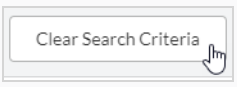
   The Search Criteria panel opens.



3. Select one or many of the search criteria listed. The reviews will automatically populate at the bottom as you enter your criteria.



4. To remove all of your search filters, click **Clear Search Criteria** at the bottom of the search panel.



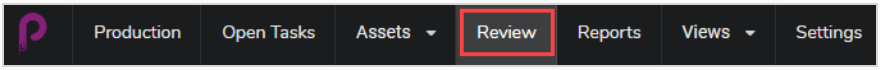
   All of the sessions are be displayed in the session list.

Editing a Review Session

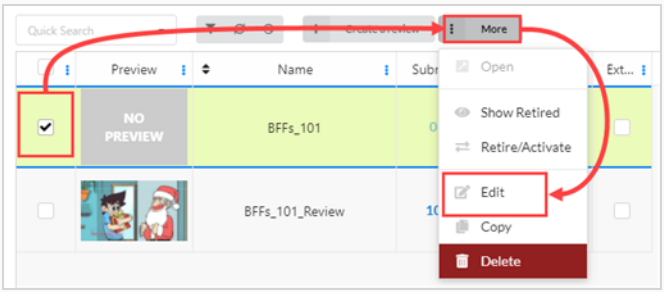
Once a session is created, you can edit its name, assignee, restriction, date and if the review is external.

How to edit a review session

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

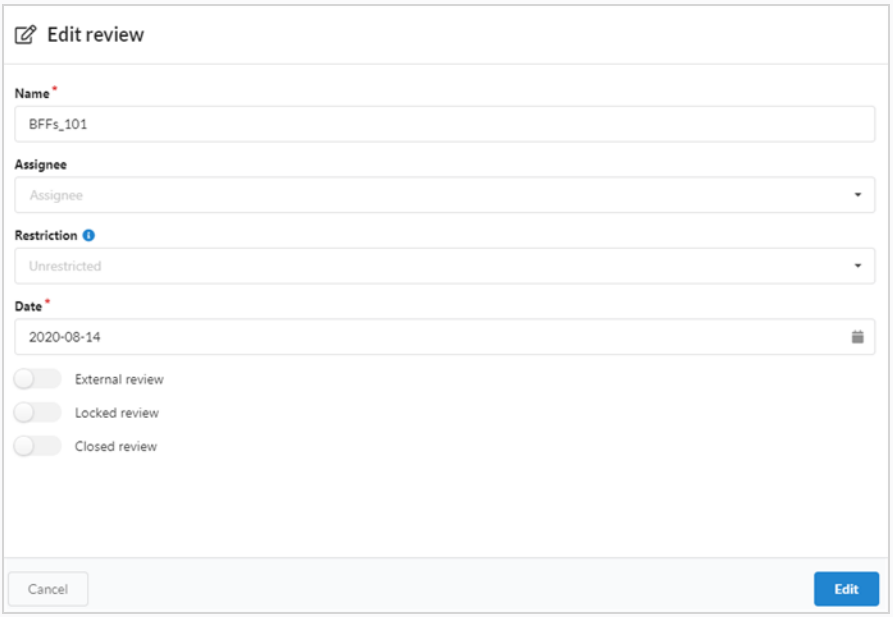


2. In the Review page, check the box on the far left for the review you wish to edit.
3. Select **More > Edit**.



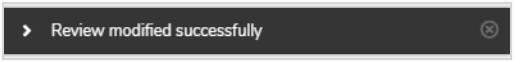
The Edit Review window opens. You can change the name of the review, set or change an assignee, create a restriction, set a date as well as label External/Locked/Closed reviews.

> **NOTE**
>
> The External Review is a simple flag and is only used to help with search results.



4. Click the **Edit** button at the bottom to save your changes.

   A notification appears in the center of the page indicating that the changes are saved.



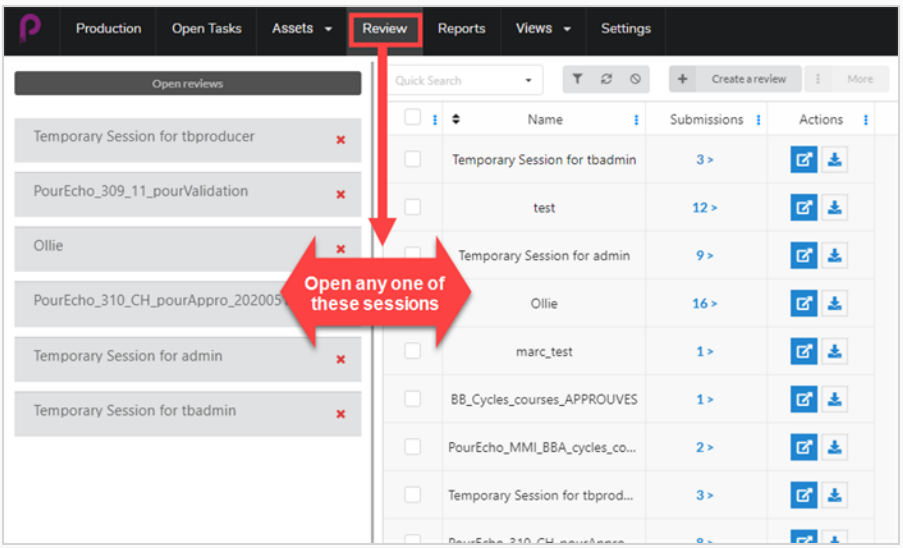
Opening a Review Session

Once a session has been created and filled with scenes, you can open it and play the preview movies for each scene in the session in a single video player. From the Review interface, you can add notes to scenes, draw annotations, approve scenes or send them for revision.

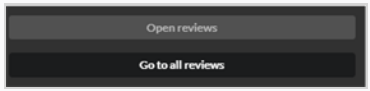
You can open multiple review sessions at once. Each session you open will appear in the Open reviews panel at the far left of the page.

How to open and play a review session

1. In the top menu, click **Review**.
2. In the Review page, select a review session to open.



Once in a review session, a list of one or more reviews opens in the far left column. From here you can return to the All Reviews page.



NOTE

If the column is not visible, click on the Reviews tab in the window to the right.

3. Click on the video player to the right to start playing the movie. The movie will include all the scenes in the review session, stitched together in a single sequence.

NOTE

Movies can only be stitched together if their options/parameters all match (see Delivery section below).

4. While reviewing scenes, you can do the following:

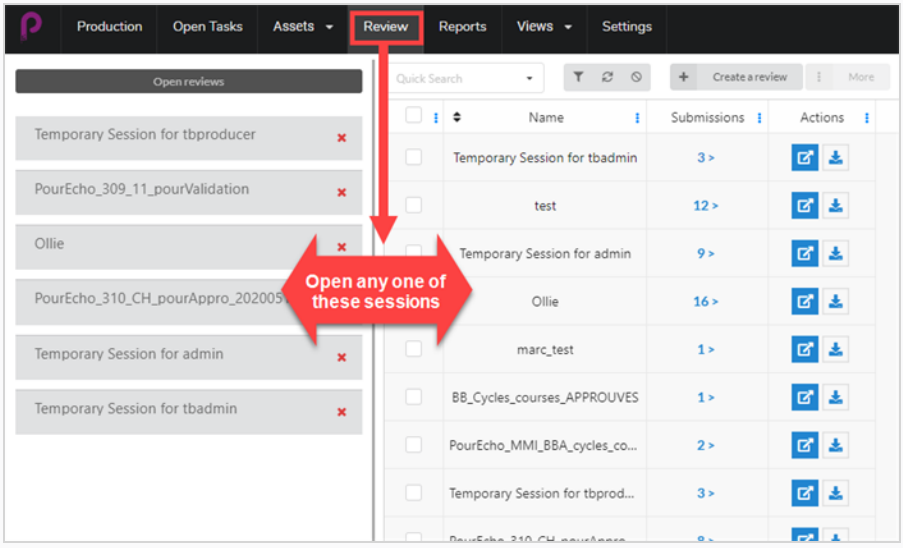
- To pause, resume, mute or adjust the volume of the video, or to skip to a specific part of the video, use the controls inside the video player. Space bar will also work to pause or resume your video.
- If you want to instantly skip to the beginning of a specific scene, select that scene in the Scenes panel to the left.
- To skip to the previous scene, click Show Previous Scene or press the Up key.
- To skip to the next scene, click Show Next Scene or press the Down key.
- To go to a specific frame, pause the movie near the frame you want to see, then click Show Previous Frame or press the Left key to go back one frame, or click Show Next Frame or press the Right key to go forward one frame.
- To hide or display the controls in the video player, click Video controls.
- Click Maximize to hide the Scenes and the Notes panel and expand the video player.
- To enable or disable looping, click the Looping button. When looping is enabled, the player will play the first scene from the beginning after reaching the end of the last scene.

Returning to the Session List and Switching Sessions

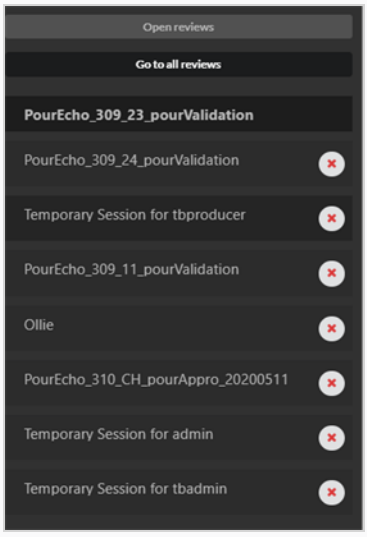
Once you have already opened a session, you can return to the session list using a number of ways.

How to return to the session list

1. Do one of the following:
    - From any page, in the top menu, click **Review**.
    - From the Review Session page, select any open review or any review that was created



- Once in a review session, you can easily switch from one open review to another. On the far left of the page there should be a list of Open Reviews.



- If the list isn't visible, select the Reviews tab in the window to the right.

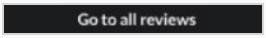
2. From here you can easily switch reviews by selecting the next open review in the column.

Removing Scenes from a Review Session

If you accidentally added extra scenes to a review session, you have the ability to remove them.

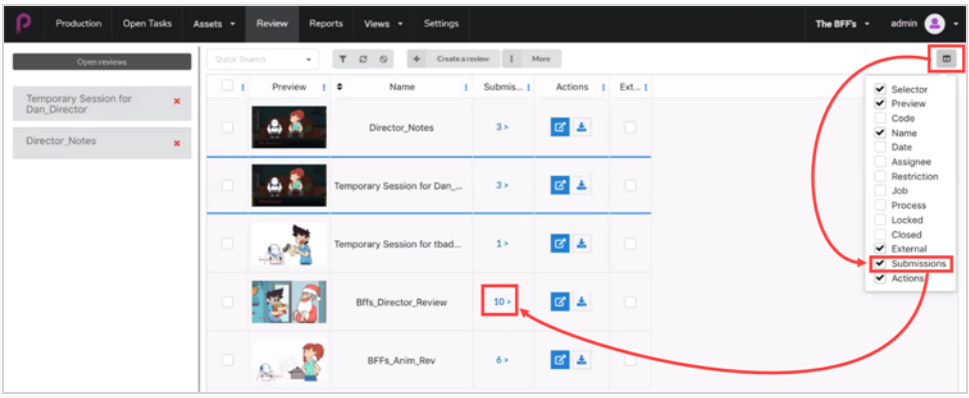
How to remove scenes from a review session

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

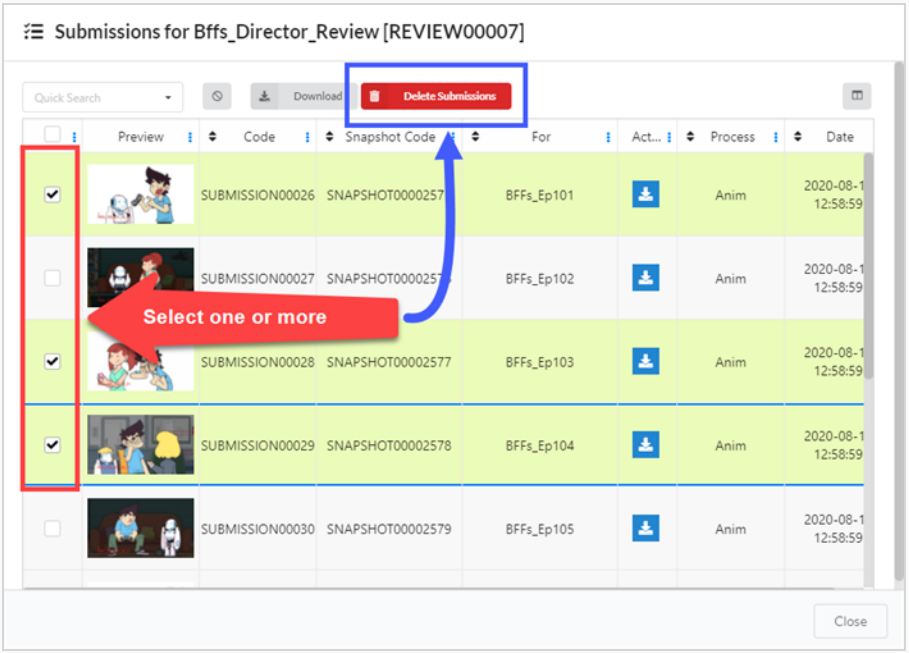
   

   In the column, the number of Scenes/Snapshots that have been submitted appears.
4. Click on the Submission number.

   The Submission window opens.

   In the Submission window, all the snapshots/scenes for the current review are displayed.
5. Select one or more you wish to delete and then click **Delete Submissions**.



NOTE

This will not delete the scene from Producer.

Deleting a Review Session

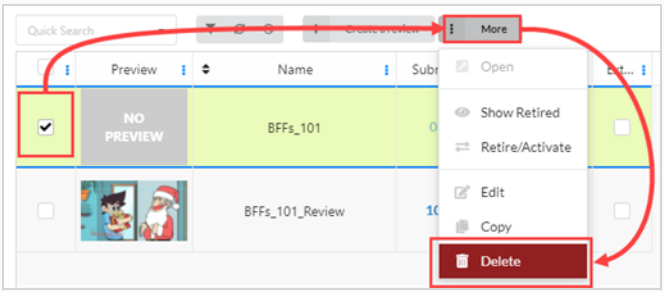
Deleting a session will permanently erase it and it will not be accessible again.

NOTE

Deleting a review session will not delete any of its scenes, nor will it delete any of the attachments or notes created within the session or undo any of the task status changes done within the session.

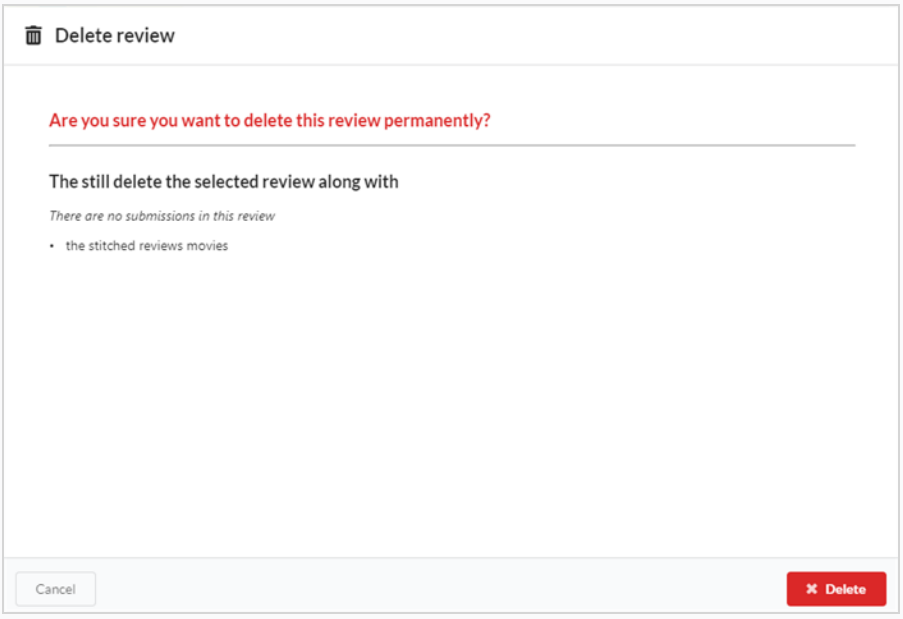
How to delete review sessions

1. In the top menu, click **Review**.
2. In the Review page, check the box on the far left for the review you wish to edit.
3. Select **More > Delete**.

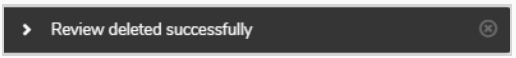


A confirmation prompt opens.

4. In the confirmation prompt, click **Delete**.



A notification appears indicating that the item is being removed from the session.



Playing Preview Movies

You can view the preview movie for any environment, job, scene, or asset in the preview column for that item.

How to play a preview movie

1. Open the job containing the scene you want to preview.
2. Do one of the following:
    - To play the scene's preview movie within its thumbnail in the Production page, click on the Play ▶ button below its thumbnail.
    - To pause the movie within the thumbnail, click on the Stop ■ button.
    - To watch the preview for an item, click on the Play ▶ button, or click in the video player to play the movie.
    - Press the Stop button or the spacebar to start the movie from the beginning.
    - To open the preview movie for a scene in high resolution, click on the Expand ⛶ button below its thumbnail. The preview movie will open in a new tab.

Adding a Note to a Scene in a Review Session

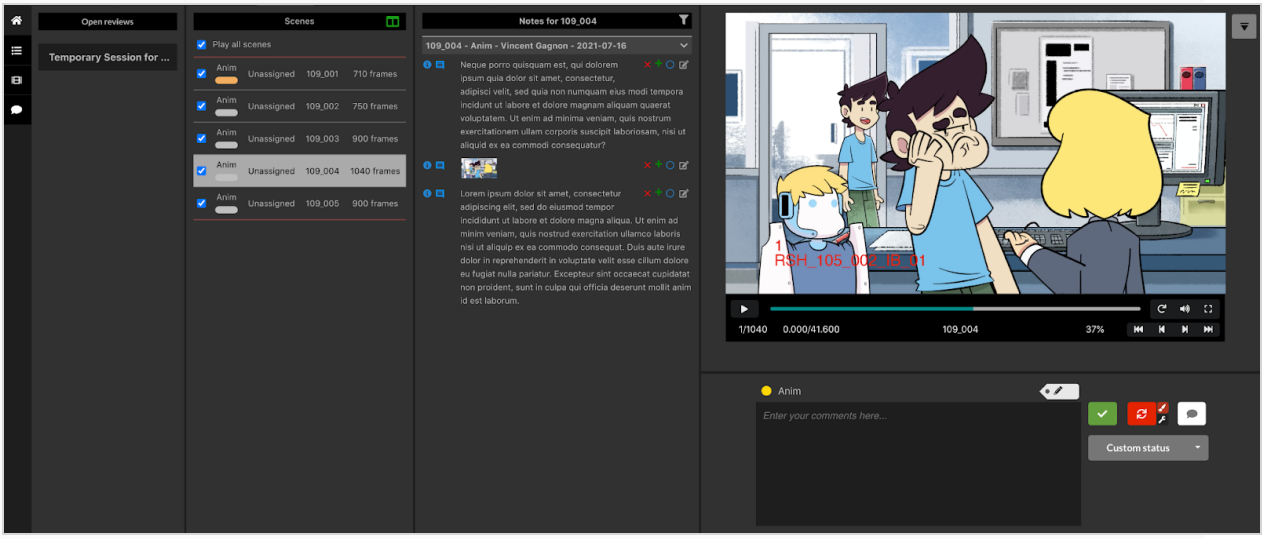
Notes can be added to scenes in a review session to make comments and suggestions, request corrections, point out details or otherwise communicate important information about a scene to project collaborators.

NOTE

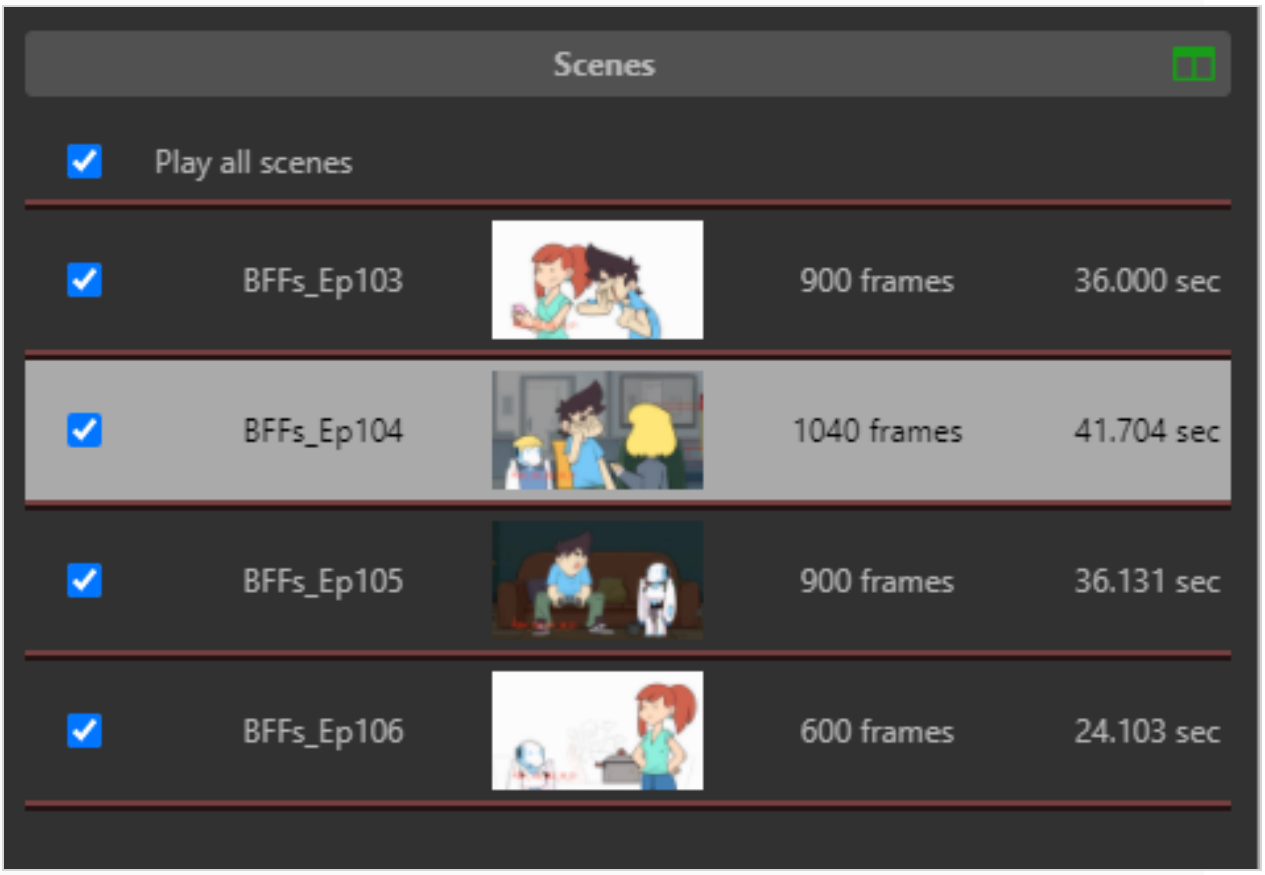
- Scene notes can also be added and viewed in both the Production page and in the My Tasks page.
- It is also possible to draw annotations over a frame in a scene and attach it to a note.

How to add notes to a scene in a review session

1. Open the review session containing the scene you wish to review. There can be 4 different columns open.

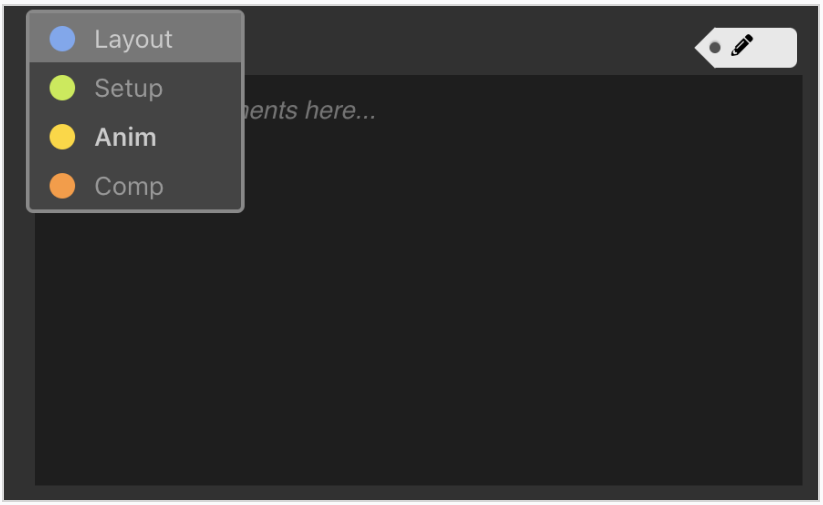


2. In the Scenes column, select the scene to which you want to add a note or scroll horizontally in the Timeline below the preview area, select the exact frame where you want to add a comment.

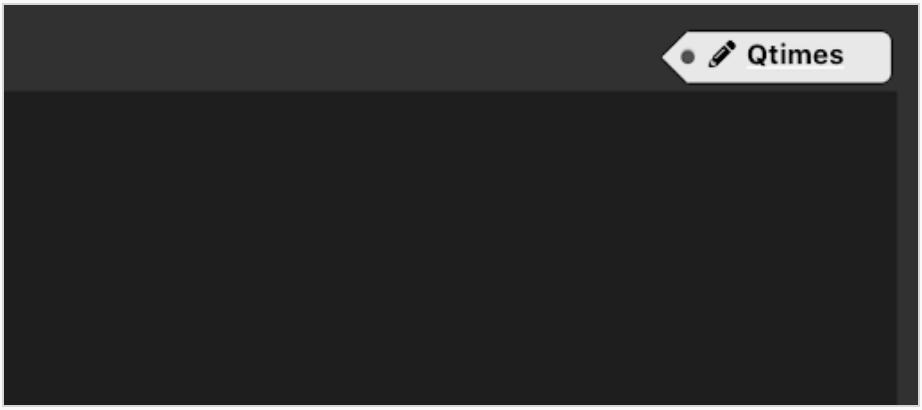


3. If you want to leave a note for a different process than the pre-selected process of this review, select a new process by clicking on the coloured pill, above the comment box, on the left.

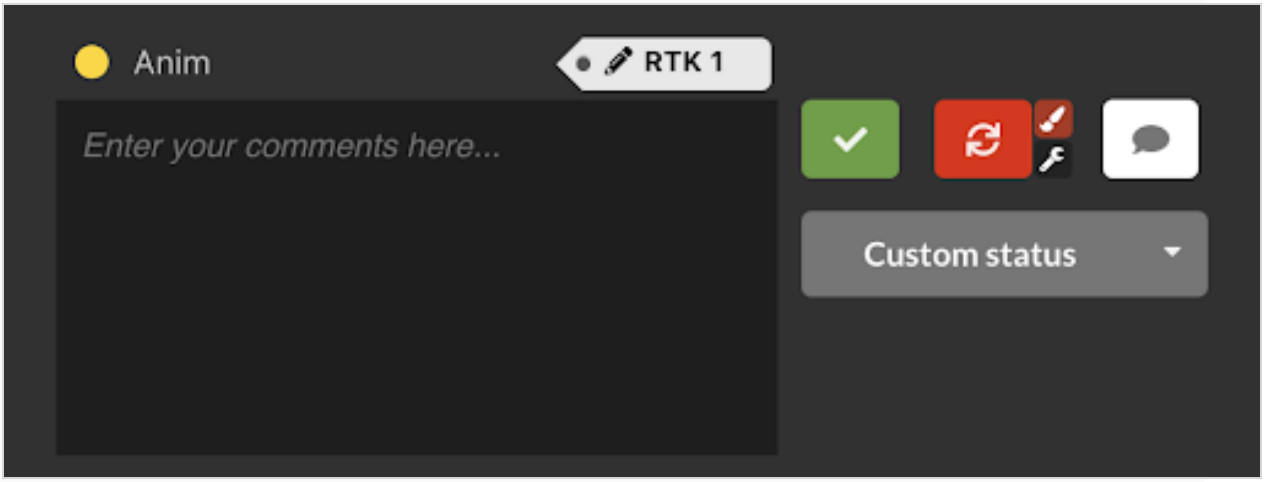
> **NOTE**
>
> This step is OPTIONAL.



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

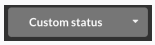


5. Type your note in the comment box.



There are 4 options to register your comment:

- **Approve Scene**: Sets the scene review process to Approved in Producer and logs your comment with the approval.
- **Save Note as a Comment**: Your note will appear as a comment in the context of the current process.
- **Revise Note**: This will set the scene review process to Retake (or Revise) and will save your note as the explanation.
    - Optional: You can check the brush to mark an “Artistic Retake” or the wrench to mark a “Technical Retake” (or both).

- 

Set a Custom Status: Select a custom status using the down arrow. Once the desired status is displayed, click on it to set the review process of the scene to this status and save your comment along.

Drawing Annotations While Reviewing Scenes

The Review tool allows you to freeze on a specific frame in the preview movie, draw annotations over it using a variety of drawing tools, then add this annotation to the scene, as a note.

An annotation is added to a scene as an attachment to a note. They can be viewed from the Review page as well as Production and My Task pages by opening the note attachment.

How to draw annotations

1. Open the review session containing the scene you wish to review.
2. In the Scenes column, select the scene to which you want to add a note.
3. Go to the exact frame to which you want to add an annotation by doing one or several of the following:
    - Play the video up until it is at the right frame, then pause it.
    - To fast forward to the frame you want to annotate, click and drag on the play head and release it when it is at the right frame.
    - To go back one frame, click the Show Previous Frame button under the video player or press the Left key.
    - To go forward one frame or click the Show Next Frame button under the video player or press the Right key.

    NOTE

    For the keyboard shortcuts to work with the video player, you must click inside the Review tool, but outside of the video player.

4. In the top right, click the Display drawing toolbar button.

    The drawing toolbar appears.

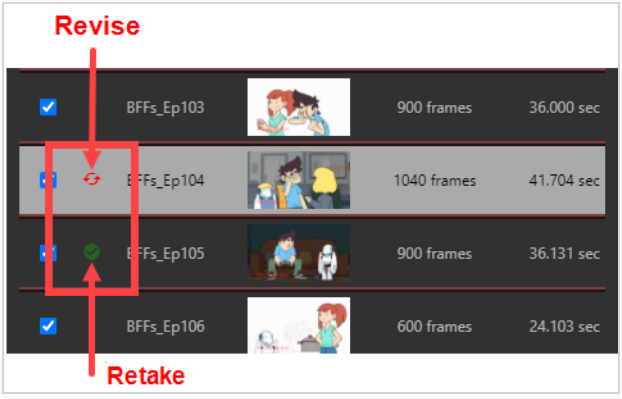
5. You can use the following tools in the drawing toolbar to draw over the frame:
    - Use the Pen tool to draw on the frame.
    - Use the Arrow tool to draw arrows.
    - Use the Box tool to draw rectangles and boxes.
    - Use the Straight Line tool to draw straight lines.
    - Use the Erase tool to erase any drawings..
    - Set the Set Drawing Colour tool to change the colour of your drawing tool.

- Use the Undo Last Drawing tool to undo the last drawing stroke.
- Use the Redo Last Drawing tool to redo the last stroke you undid.
- Use the Clear All Strokes tool to clear all drawings

6. In the Review process drop-down below the preview area, ensure the process for which you want to add an annotation to is selected.
7. Do one of the following:
   - To only add your annotation to the scene without approving it or sending it for revision, click the Save Note button.
   - To add the annotation to the scene and send it for revision, click the Revise Scene button.
   - To add the annotation to the scene and approve it, click the Approve Scene button.

   The note and its annotation will appear in the Notes column in the middle, near the top.

   If you approved the scene or sent it for revisions, an extra note will appear in the Notes column indicating so. The icon next to the scene in the Scenes list will also change to represent its current status.



Sending a Scene in a Session for Revision

When reviewing a scene in a review session, you can send it back to the project collaborator who worked on it to request revisions. You can add a note to specify which revisions are requested, draw annotations over a specific frame in the scene to visually indicate what kind of revisions are needed, or both. You can also indicate whether the requested revisions are technical or artistic.

NOTE

NOTE: Adding a note or an annotation is required to send a scene for revisions.

How to send a scene for revisions with a text note

1. Open the review session containing the scene you wish to review.
2. In the Scenes column, select the scene that you want to send back for revisions.
3. In the Enter your comments here text box, type in the content of your note.

   NOTE

   You must include a note or annotation drawing when sending sessions for revision.

4. Click Revise scene to send the scene for revisions.
5. In the Select the type of revision dialog, choose whether the note is Regular, Artistic, Technical, or Both.

   The status of the scene's current process is set to Retake. The note appears in the Notes column. In the Scenes column, two curved red arrows appear on the left of the scene.

Approving a Scene in a Session

Once a scene has been reviewed and any notes have been implemented, it can be approved.

How to approve scenes

1. Open the review session containing the scene you wish to review.
2. In the Scenes column, select the scene that you want to approve.
3. If you want to add a note while approving the scene, type in the content of your note in the Enter your comments here text box.
4. Click Approve Scene ✓ to approve the scene.

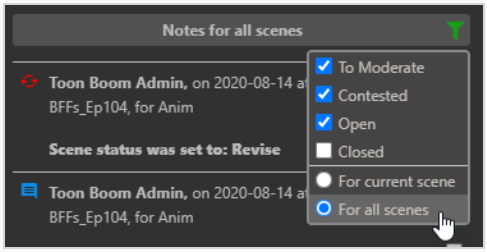
   The approval note appears in the Notes column. In the Scenes column, a green checkmark appears on the left of the scene.

Viewing Notes in a Review Session

In the Review page, you can choose whether to view all notes for the items in a session at once, or to only see the notes for the scene currently highlighted in the Scenes list. Notes are listed from newest to oldest.

How to view notes for all the scenes in a review session

1. View the session whose notes you wish to view
2. Do one of the following:
   - In the Notes column, click the Filter button. In the drop-down menu, click For all scenes.

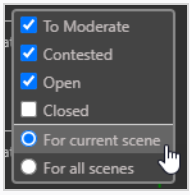


   - Click the title of the Notes list.

   Only notes for all session items will be visible.

How to view only notes for the current scene in a review session

1. To return to only viewing notes for one item at a time, do one of the following:
   - In the Notes column, click the Filter button. In the drop-down menu, click For current scene.



   - Click the title of the Notes list.

   Only the notes for the current item will be visible again.

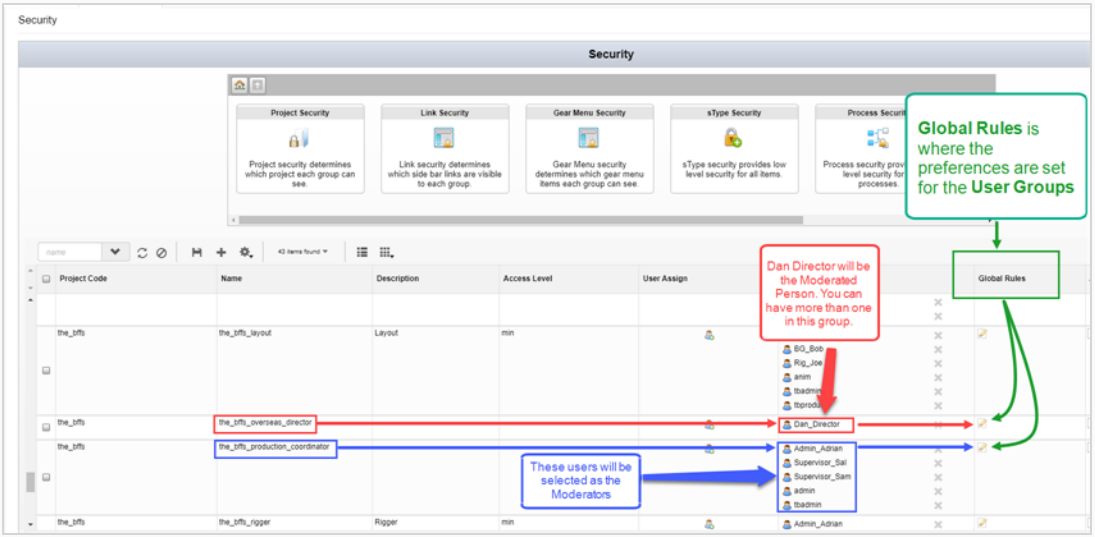
Moderating Notes

For this to work, a user must be tagged as a Moderator and another as a Moderated Person by the administrator. As a Moderated Person, their notes will not reach the general public in the production immediately. They will have to go through a Moderator(s) in order for their notes to get to the rest of the production. This is a safeguard for all involved.

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

How to moderate directors notes

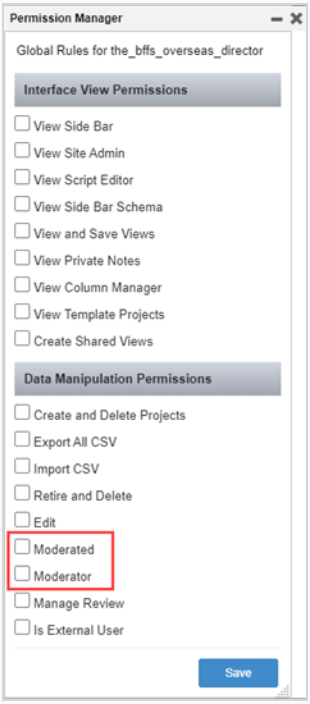
1. To add a user as a Moderator or Moderated Person, in the main menu, select **Settings**.
2. In the Settings tab, select **Security**.



3. Find the group in the production you wish to be the Moderator or the Moderated.
4. If you need to add or subtract names from those groups, in the User Assign tab, select the User icon .

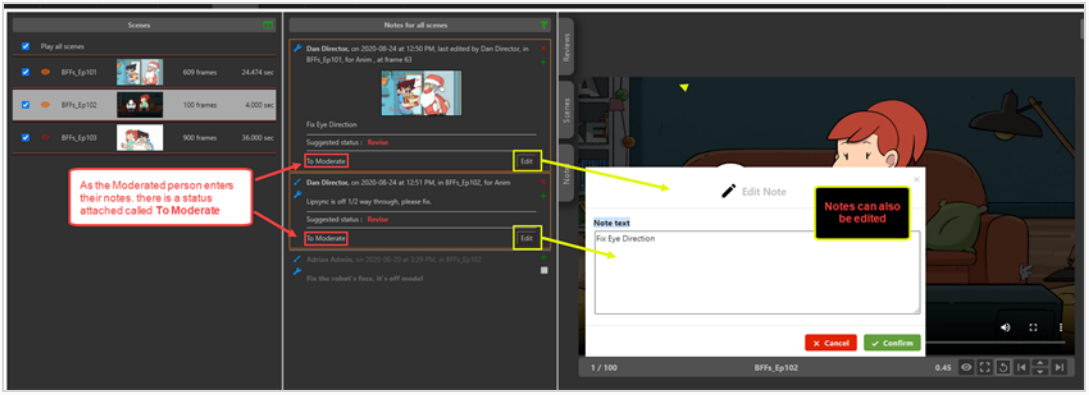
   The Assign Users to Group dialog box opens.
5. Use the check box to add or remove users from the associated group, the click **Save**.
6. In the Global Rules column, select the Edit icon.

   The Permissions Manager dialog box opens.

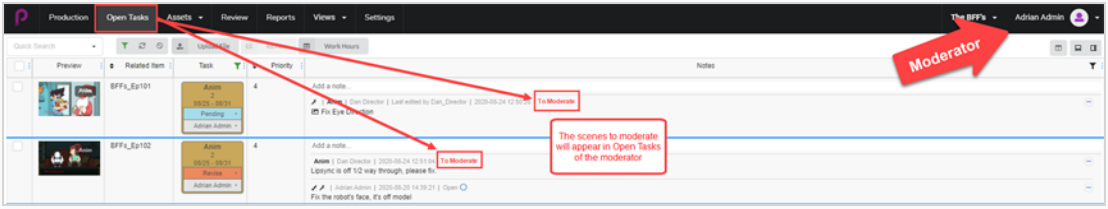


7. In the Data Manipulation Permissions section, check the **Moderator** and **Moderated** checkboxes.
8. Click **Save**.

   Now whenever a Moderated person writes a note—see Writing Notes, the status To Moderate is added within the note. The Moderated has the ability to edit their notes.



The To Moderate Status also appears in the Notes column of the Open Tasks tab for any user designated as a Moderator.

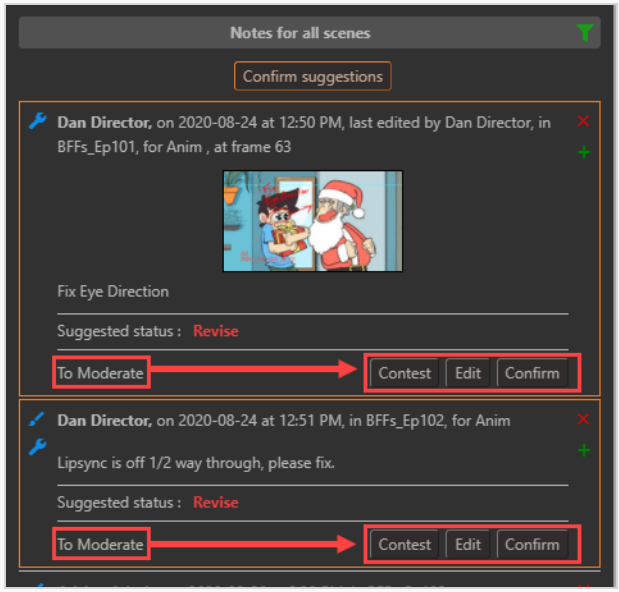


How to view and moderate notes

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

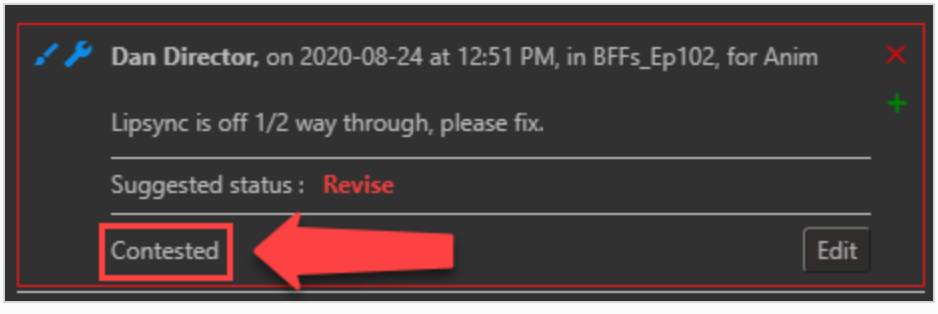
   In the Notes for [scene name] section, the notes to moderate are displayed. The notes are marked in Orange.

   By default you will be able to see one scene at a time. To see all scenes to moderate in this review session, click on the green **Filter notes displayed** icon and select **For all scenes**.



3. Select one of 3 options:

   - **Contest**, if a note is contested, it will NOT appear in Open Tasks of the Moderated person, but will appear in the Notes in the review session.
   - **Edit**, if a note is contested, click on Edit to place a note as to why.



   - **Confirm**, if a note is approved it will appear in full view of the production.

   Alternatively, if you as the Moderator agree with all notes, click on the Confirm Suggestions button to confirm all.

If there is a contested note, the Confirm Uncontested Suggestions

button appears.

NOTE

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

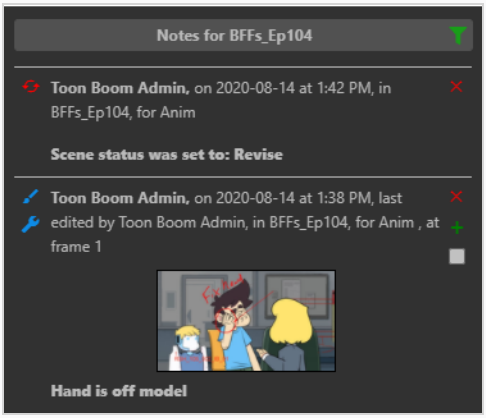
Closing and Reopening Notes in the Review Session

When a note is created, its status is set to Open. Notes can be closed to indicate that they have been acknowledged or tended to, and they can be reopened to indicate that they need further attention.

To avoid cluttering the Notes column, notes that have been closed are hidden by default. It is possible to display them so that they can be viewed reopened if needed.

How to close a note

1. Open the review session containing the scenes for which you want to close or reopen notes.
2. Do one of the following to display the note you want to close:
3. In the Scenes column, select the scene containing the note you want to close.
4. Make the Notes column display the notes for all the scenes in the review session.
5. In the Notes column, find the note you wish to close.



> **NOTE**
>
> All new notes are ☐ Open by default.

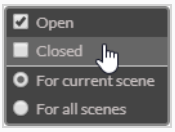
6. To close an open note, check the checkbox in its bottom-right corner.

   The status of the note is be set to ☑ Closed. Unless you enabled displaying closed notes in the Notes column, it will disappear from the Notes column.

How to reopen a note

1. Open the review session containing the scene for which you want to reopen a note.
2. In the Notes column, click the **Search** button.

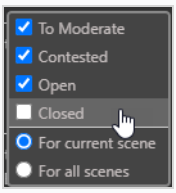
3. In the drop-down menu, make sure **Closed** is checked.



   Closed notes appear in the notes list.

4. Do one of the following to display the note you want to reopen:
   - In the Scenes column, select the scene containing the note you want to close.
   - Make the Notes column display the notes for all the scenes in the review session.
5. Find the note you wish to reopen.
6. To open a closed note, check the checkbox in its bottom-right corner.

   The note will now be Open.
7. To hide the other closed notes, click the Filter button again.
8. In the drop-down menu, uncheck the checkbox next to Closed.



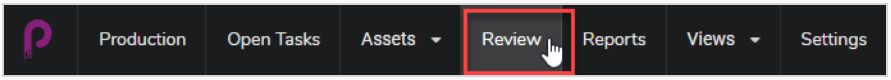
   All closed notes will now be hidden from view.

Downloading Reviews

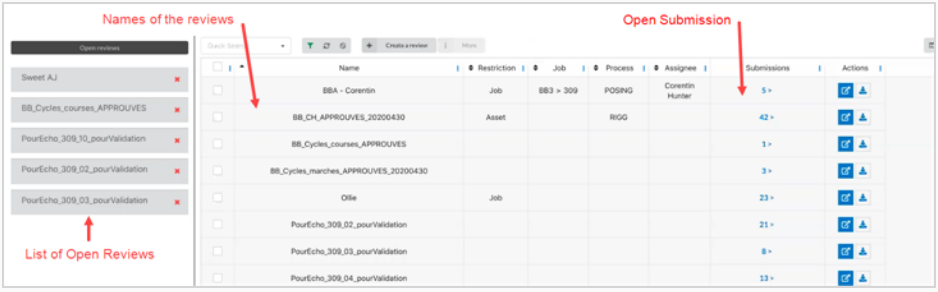
Producer gives you the ability to download the reviews on your local machine.

How to download reviews

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

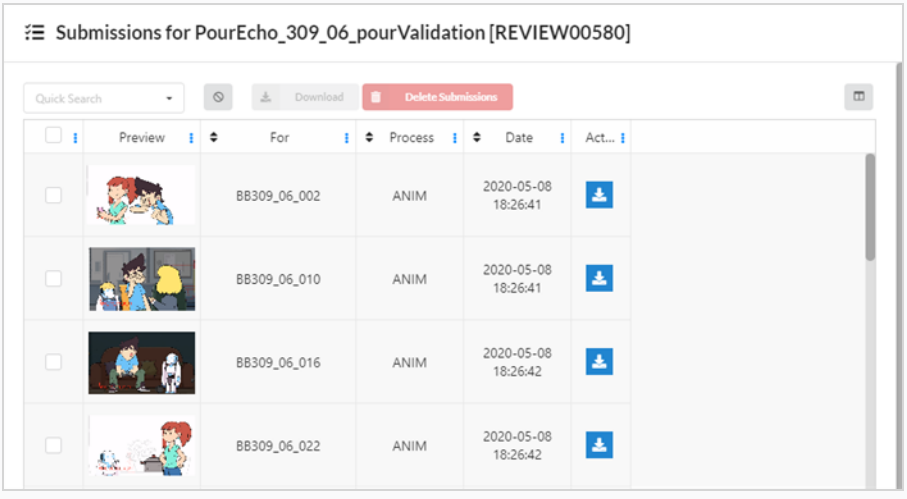


You will then see Open Reviews, Names of the Reviews and Open Submissions.

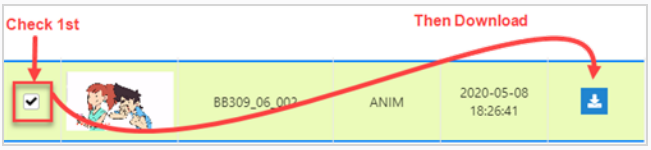


2. To view a submission, click on the number in the submission column.

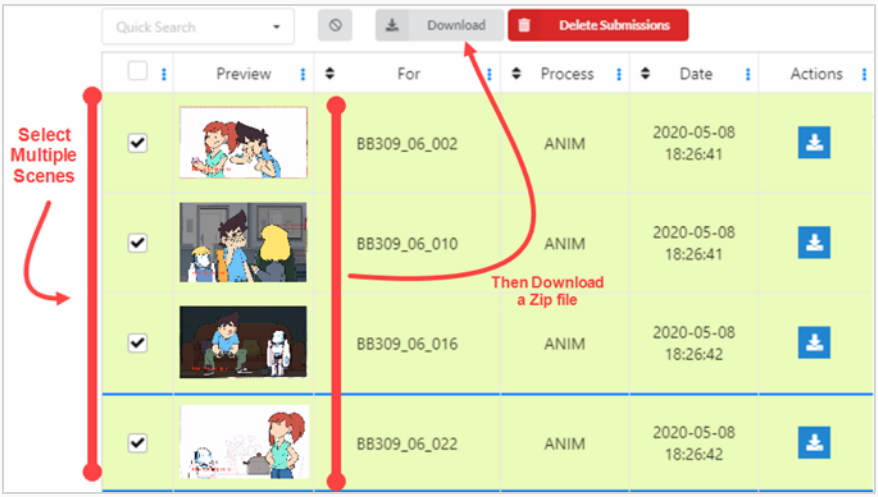
The Submission window opens.



3. You can now download individual reviews by clicking on the check box on the far left and then on the blue button in the Actions column. You may select as many check boxes as you like but you must select each download button to download individually.



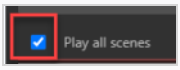
4. You can also download multiple scenes at the same time into a Zip folder. Select all the scenes you wish to download and then click on the Download button above the entries.



5. If you wish to download a full review with all the videos stitched together, select the review you wish to open from either the Open Reviews area or by selecting the Open Review button from the Actions column.

   A new window opens.

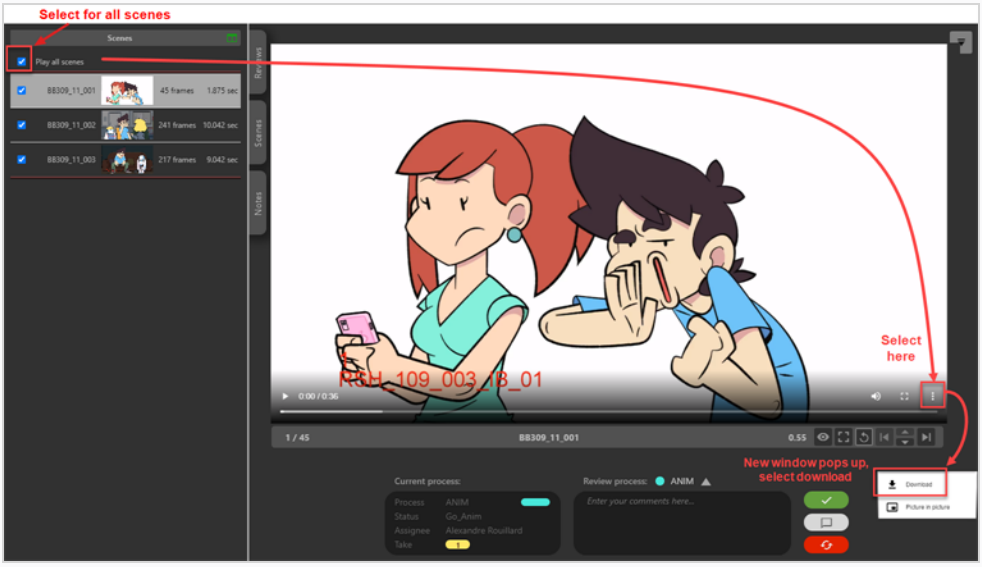
6. In the Scenes area, check the select all boxes or select the individual videos you wish to have stitched together.



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

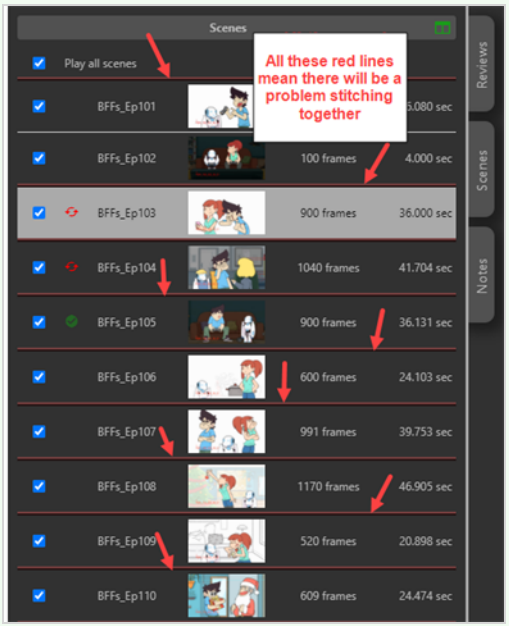
   A new window opens.

8. Select **Download**.



NOTE

If there are red lines separating the videos, there was a problem stitching the videos together. It could have be cause by a number problems, ie: video codec, audio codec, fps, timebase, aspect ratio.



Chapter 11: Importing from Storyboard Pro

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

Importing from Storyboard Pro

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

This is a 2-step procedure:

- Exporting scenes metadata and animatic from a Storyboard Pro project
- Importing these scenes and animatics into Producer using Producer Link (see Installing Producer Link)

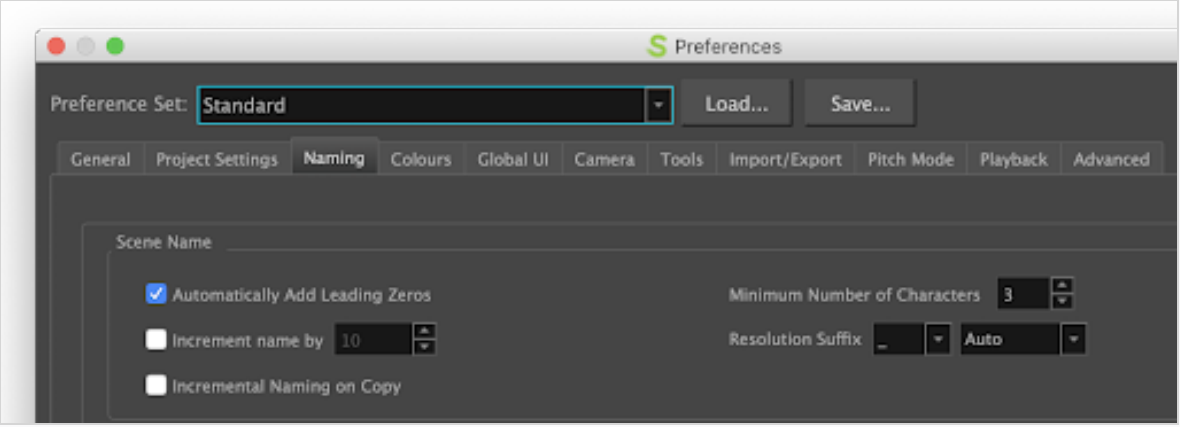
How to export data from Storyboard Pro

There are 3 steps to export your data:

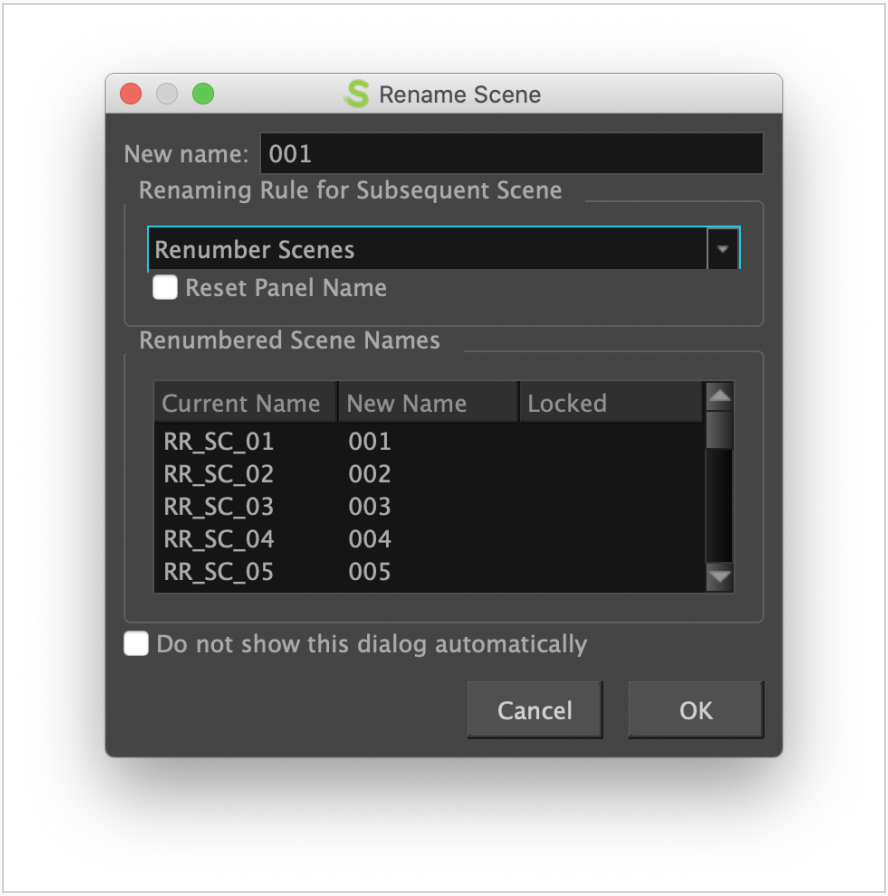
- Add leading Zeros
- Export CSV from Storyboard Pro
- Export Movie files from Storyboard Pro

Add leading Zeros

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



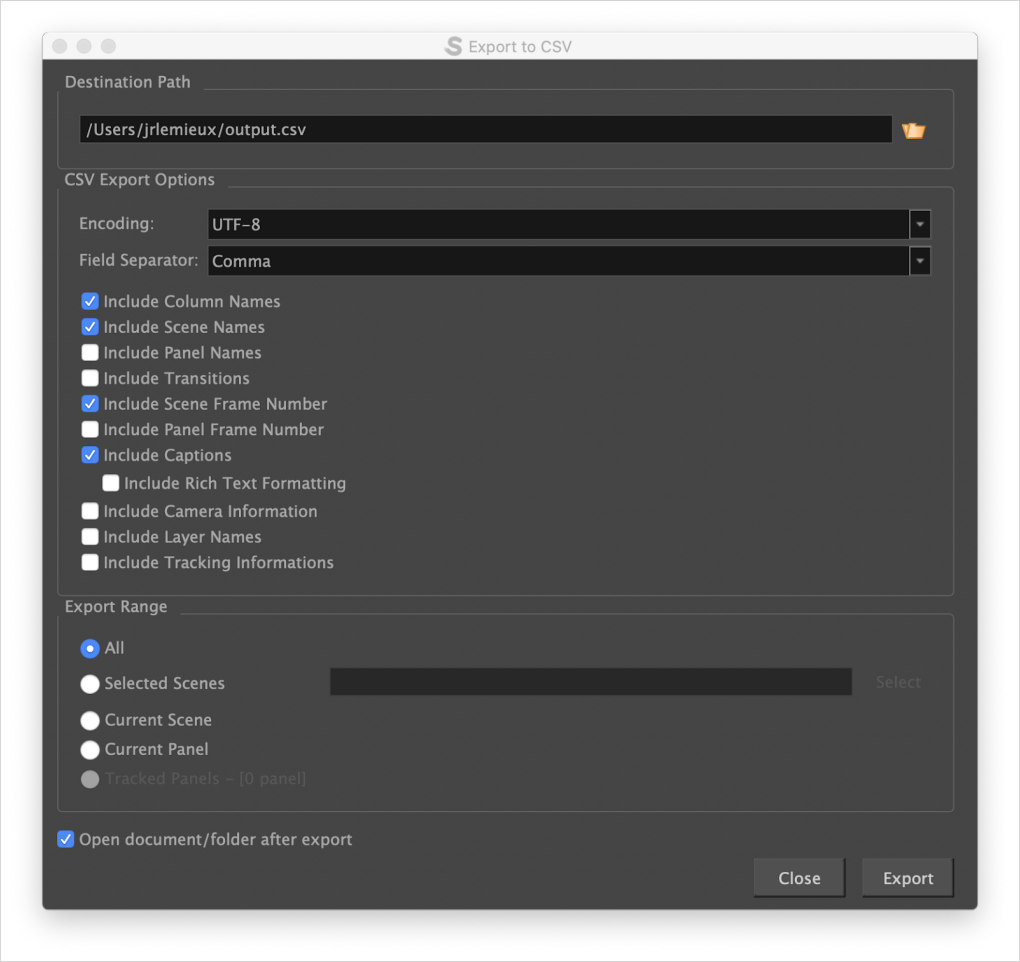
    - In the Top menu, click Storyboard and select Rename Scene.



- Save your SBP project.

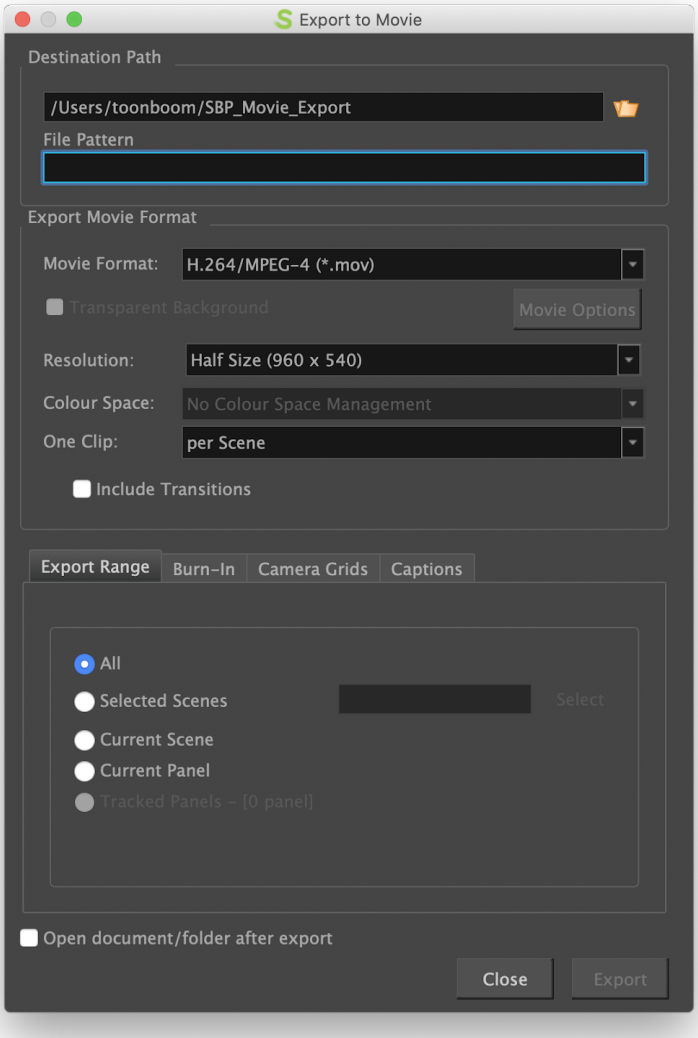
Export CSV from Storyboard Pro

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



Export Movie files from Storyboard Pro

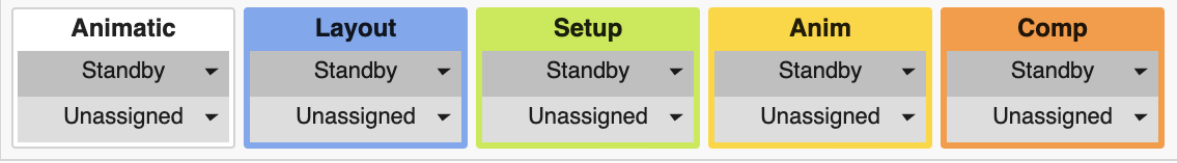
1. From Storyboard Pro, choose *File / Export / Movie*
2. Fill in the Destination Path
3. Leave the File Pattern field blank
4. In One Clip field, select per Scene from the drop-down list
5. Click Export



How to import Storyboard Pro data in Producer

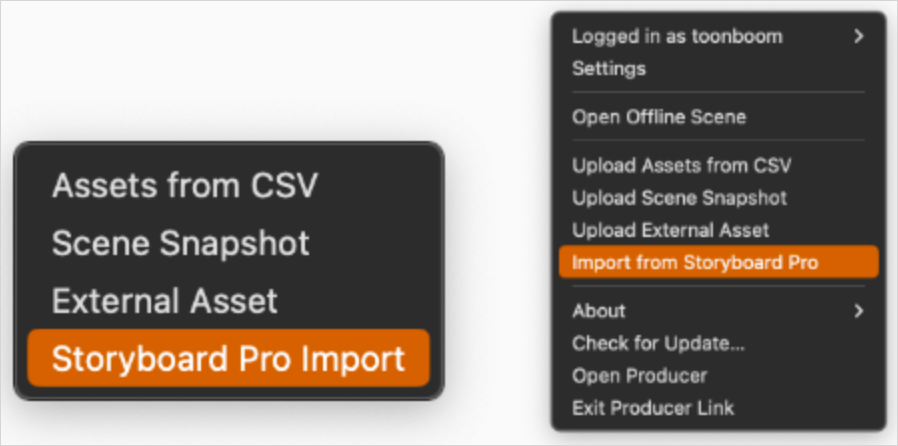
1. Determine which workflow process will be used.

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



2. Open Producer Link application.

3. From Producer Link main menu or tray, select “Import from Storyboard Pro” (“Storyboard Pro Import”)



NOTE

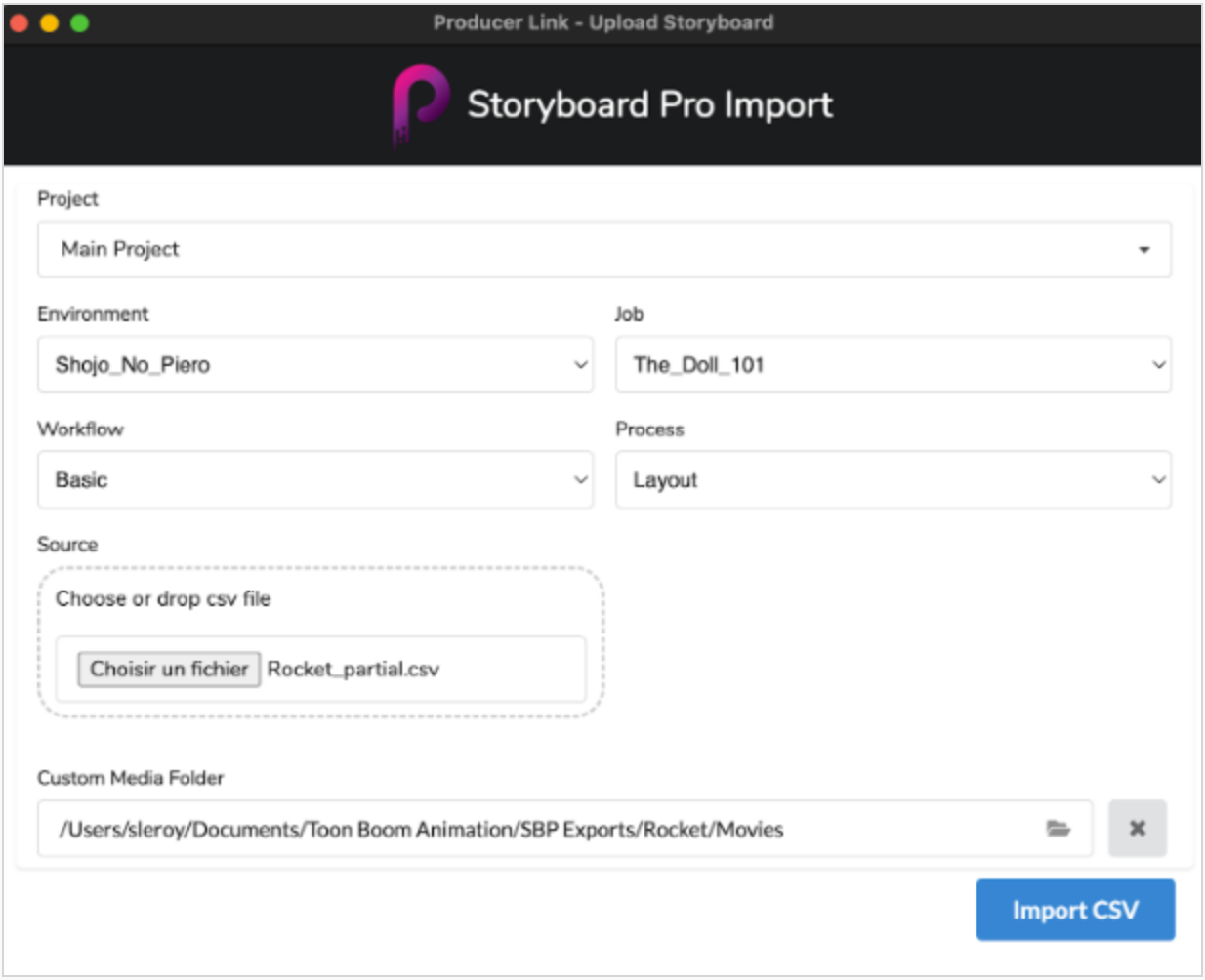
If you are not logged in, this menu option will not be available.

4. Fill all the fields.

NOTE

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

5. Click “Import CSV”.

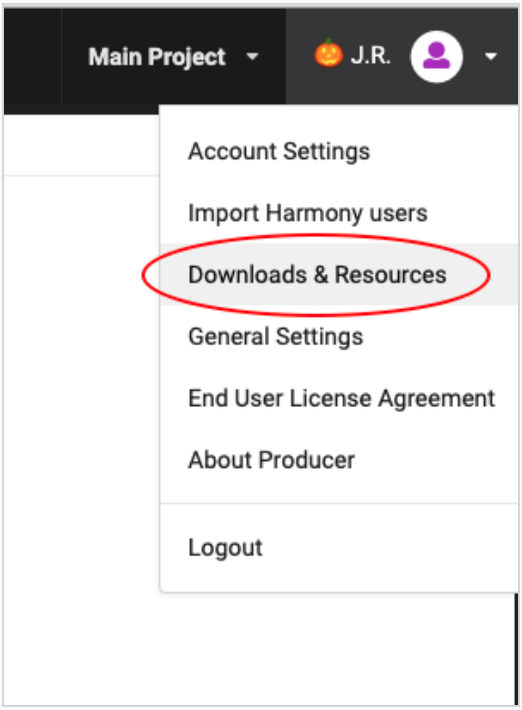


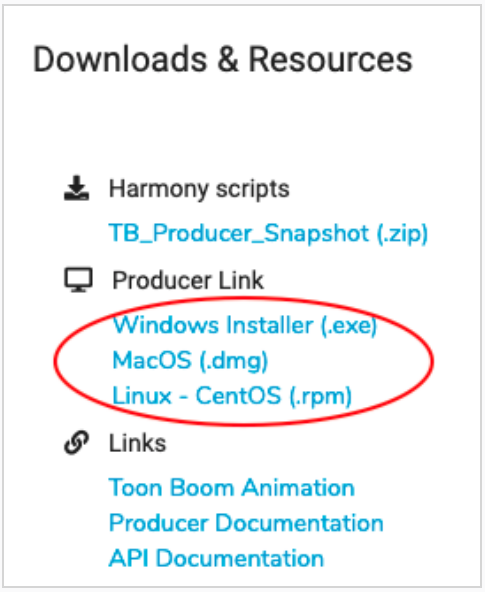
You can monitor the import process by scrolling down. In Producer, refresh your Production page to see the new scenes.

How to download Producer Link

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

1. Select “Downloads & Resources” from the menu.





2. Click the Producer Link file for your platform.

Chapter 12: Reports

Report Categories

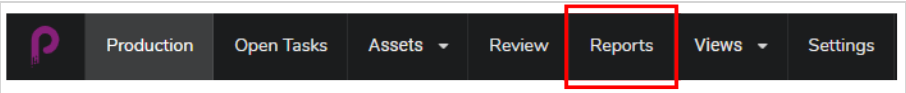
There are four categories for reports:

Category	Description
Workload	View how much work everyone has and reassign tasks as needed.
Summary	Show an overview of a project along with a pie chart.
Productivity	Track the amount of work that has been done over time along with a bar graph.
Other	Miscellaneous reports that include progress reports and job tasks reports.

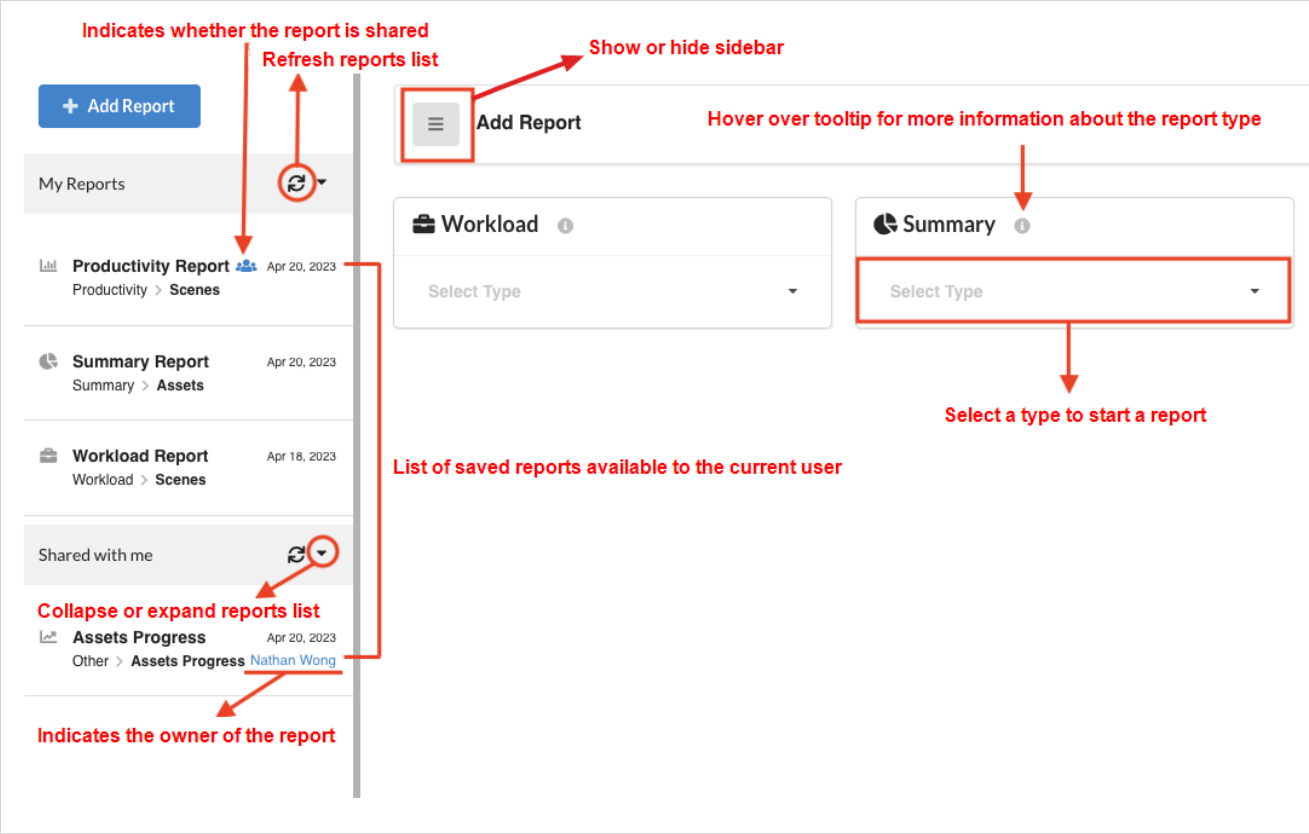
General Interface

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

You can navigate to this section by selecting “Reports” in the top menu.

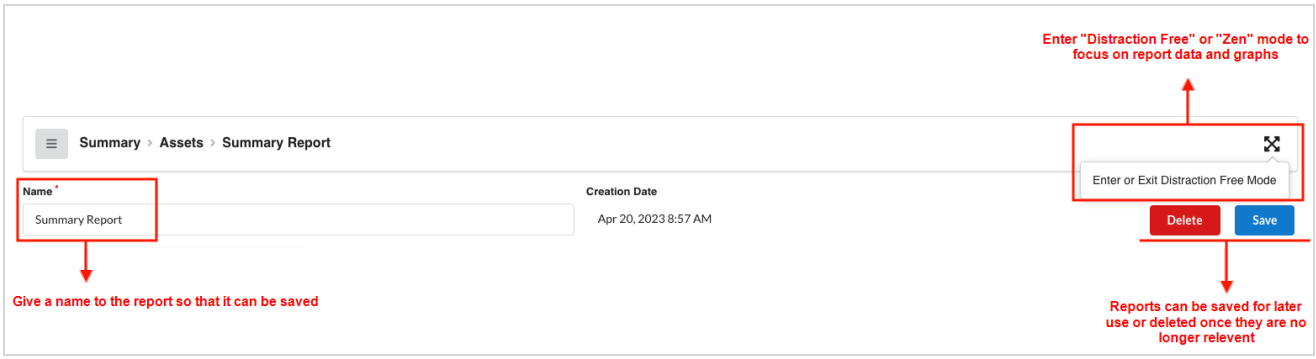


By default, the page will bring you to the “Add Report” section. You can choose to select an existing report from the sidebar or continue creating a new one.



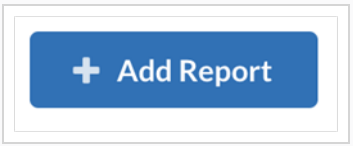
Once a report is generated, it is possible to save it for later and share it with other people.

You may also choose to display only the data table and graphs for the current report, a mode known as the “Distraction Free Mode”, by pressing on the four-arrows button.



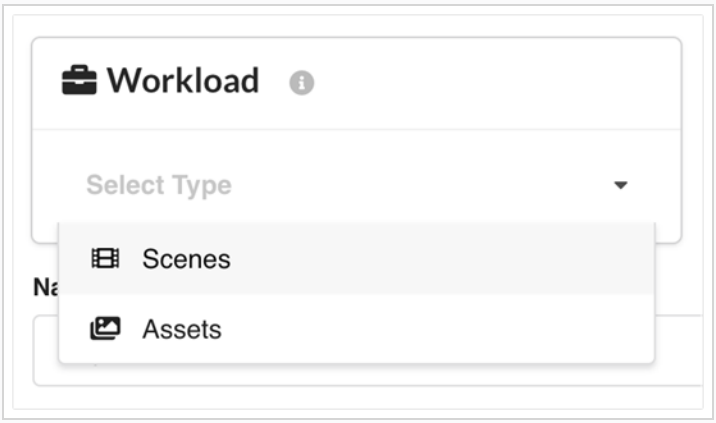
How to generate a report

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

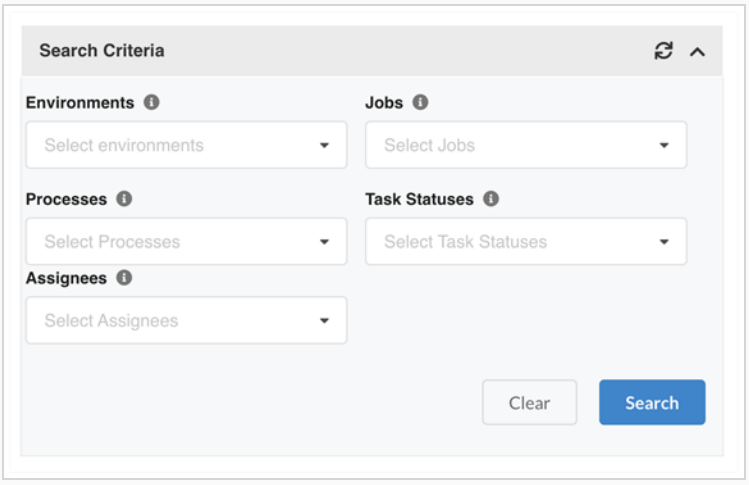


> **NOTE**
>
> You may hide the sidebar, to maximize the report area. You can always bring it back later, the same way you are hiding it, by clicking on the "Show or hide sidebar" button (the "burger" icon).
>
>

2. From one of the drop-down boxes, select the type of report you are interested in. For example, in the workload reports, you can choose from "Scenes" or "Assets".



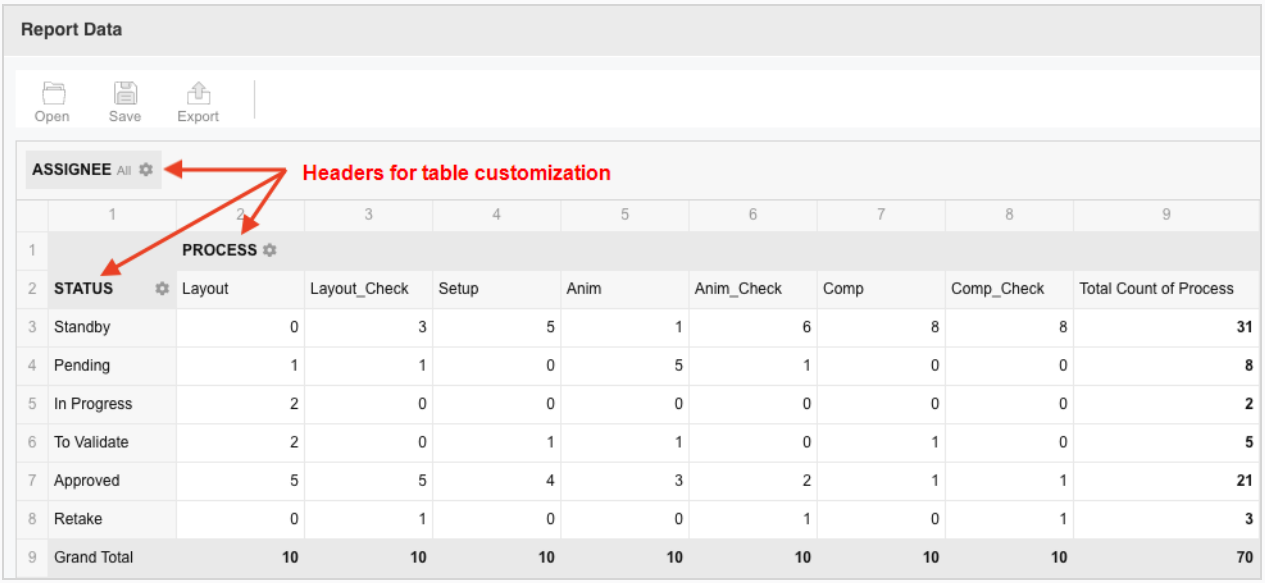
3. From the “Search Criteria” section, restrict the search to your liking. You can choose to focus on a specific criteria or a combination of them. Press the “Search” button when you are ready to proceed.



How to filter data in the reports

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

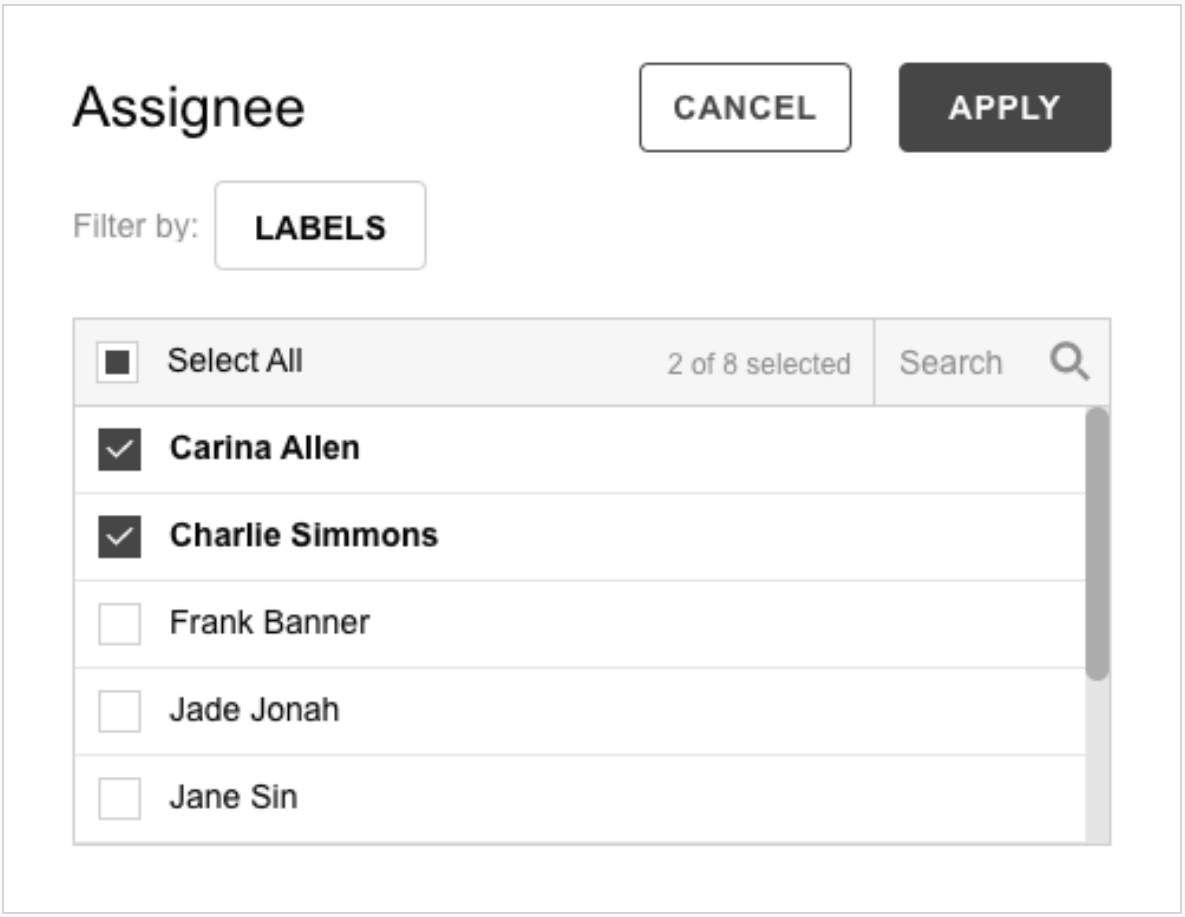
These headers can be dragged and dropped within the table to customize its navigation.



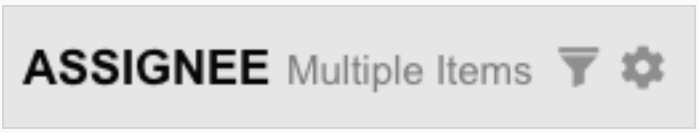
	1	2	3	4	5	6	7	8	9
1		PROCESS							
2	STATUS	Layout	Layout_Check	Setup	Anim	Anim_Check	Comp	Comp_Check	Total Count of Process
3	Standby	0	3	5	1	6	8	8	31
4	Pending	1	1	0	5	1	0	0	8
5	In Progress	2	0	0	0	0	0	0	2
6	To Validate	2	0	1	1	0	1	0	5
7	Approved	5	5	4	3	2	1	1	21
8	Retake	0	1	0	0	1	0	1	3
9	Grand Total	10	10	10	10	10	10	10	70

1. For example, you can choose to display data for specific assignees in Summary and Productivity reports. To do this, click on the gear icon for “Assignee”

2. From the list of assignees, select the ones whose numbers you would like to see. For example, let's look at the data for Carina Allen and Charlie Simmons. Click "Apply" to confirm the filtering.



3. Note how the "Assignee" header now has a funnel icon to indicate that it is being filtered.



4. Now, drag the "Assignee" header to the top of the first column. An arrow icon appears and can be expanded to view the custom data.

   In this example, each assignee can be expanded to view the number of processes in each status. You can see that "Carina Allen" currently has two "Layout" tasks in progress and one to be validated.

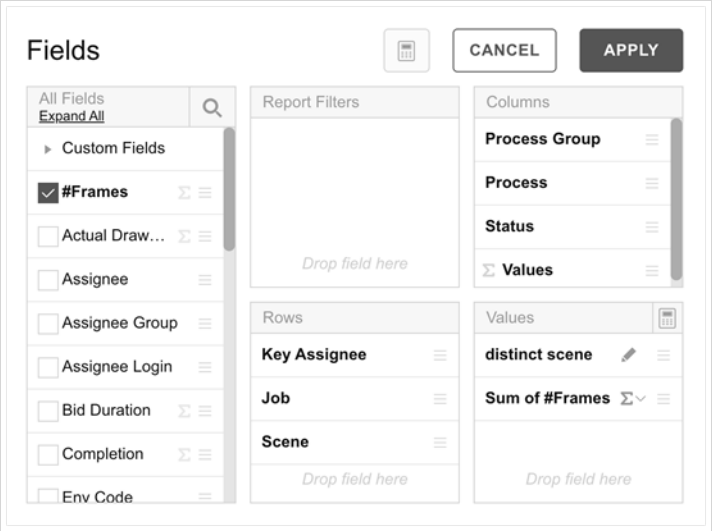
	1	2	3	4
1	ASSIGNEE	PROCESS		
2	STATUS	Layout	Comp	Total Count of Process
3	Carina Allen	**6**	**0**	**6**
4	Pending	1	0	**1**
5	In Progress	2	0	**2**
6	To Validate	1	0	**1**
7	Approved	2	0	**2**
8	Charlie Simmons	**0**	**3**	**3**
9	Grand Total	**6**	**3**	**9**

How to customize your reports

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

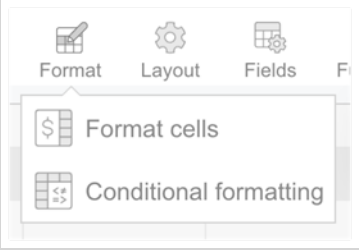
1. After generating a report, click on the “Fields” icon at the top right of the Report data section. (Note that this icon does not appear in the “Distraction Free mode”)

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



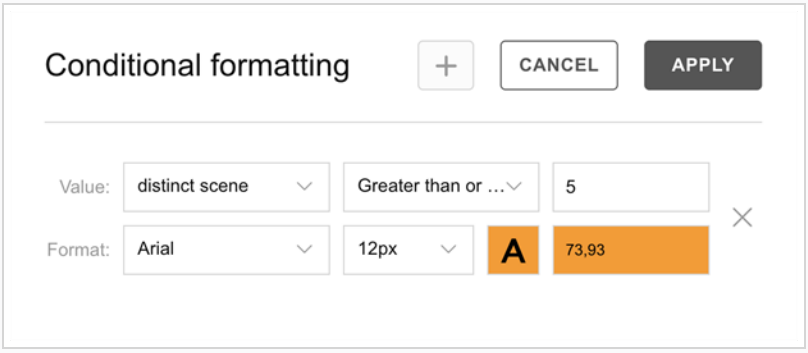
The Report data now shows the number of frames next to the number of tasks.

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

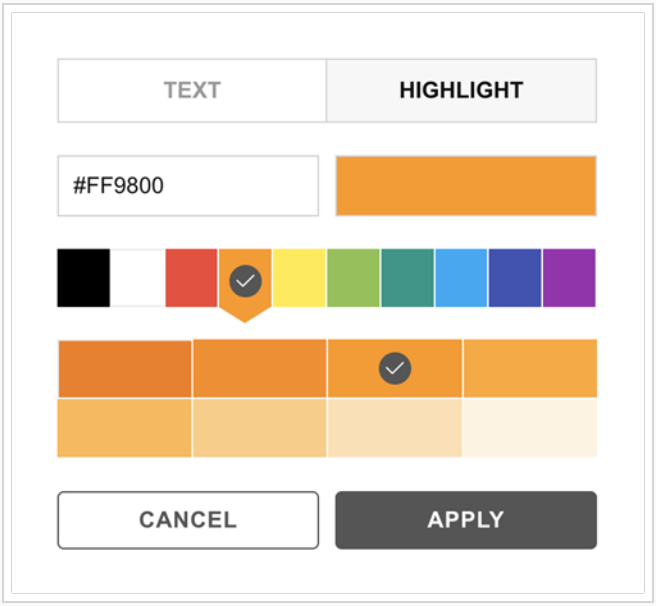


4. Click on the “+” icon to add a condition.

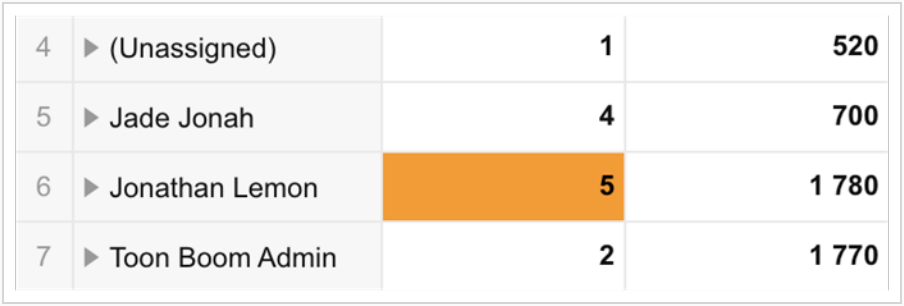
5. On the first line, for “Value”, select “Distinct scene”. Then select “Greater than or equal to” and enter the number “5”.



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

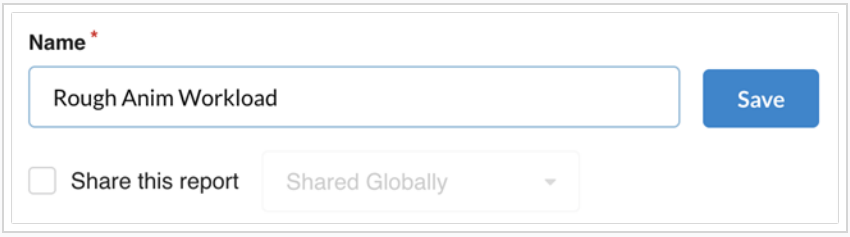


7. Click Apply to confirm the conditional Formatting. Number of tasks greater than or equal to 5 are now highlighted, making it easy to spot a heavy workload.



How to save a report

1. To save this report for usage at a later time, simple fill in the report name and press the "Save" button at the top.



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

How to share a report

1. After creating or selecting a report, select the option “Share this Report”.
2. Click the “Save” button.

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

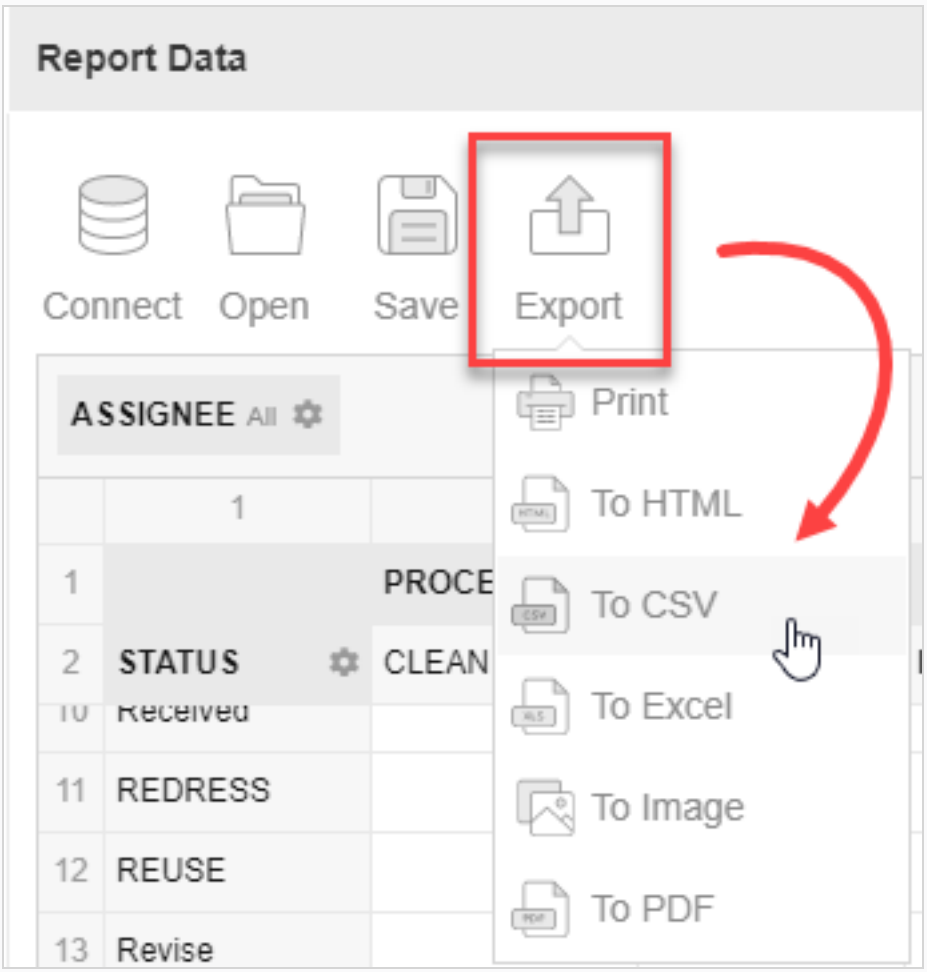
Shared reports will be displayed in the left panel under the section “Shared with me”

How to export reports

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

1. After having created a report, scroll to the “Report Data” section.
2. In this section, hover over the “Export” button to display a list of export options.
3. Click on one of the options to download the report data.

   For example, clicking on “To CSV” will download a .csv document containing all the data currently displayed.



A .csv document downloads.

Workload Manager

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

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

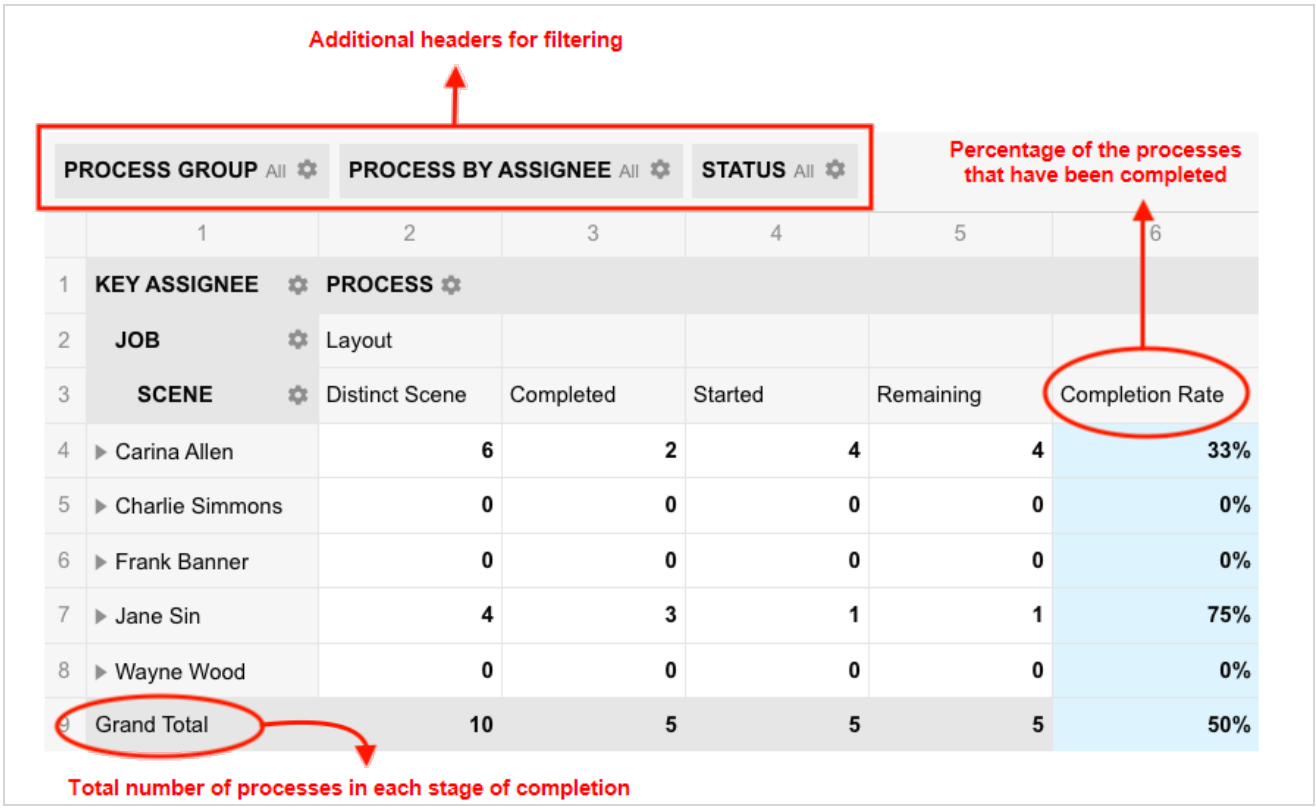
User Interface

Report Data

By default, Workload Reports will show a list of key assignees and their number of processes by their status of completion. Job and Scene details can be shown by expanding the rows. These headers can be reorganized to customize the way the data is displayed.

> **NOTE**
>
> For more information about the Reports interface and how it can be customized, see User Interface in the Reports.

With this table, it is simple for managers to see how much work is remaining for specific people and whether tasks should be reassigned.

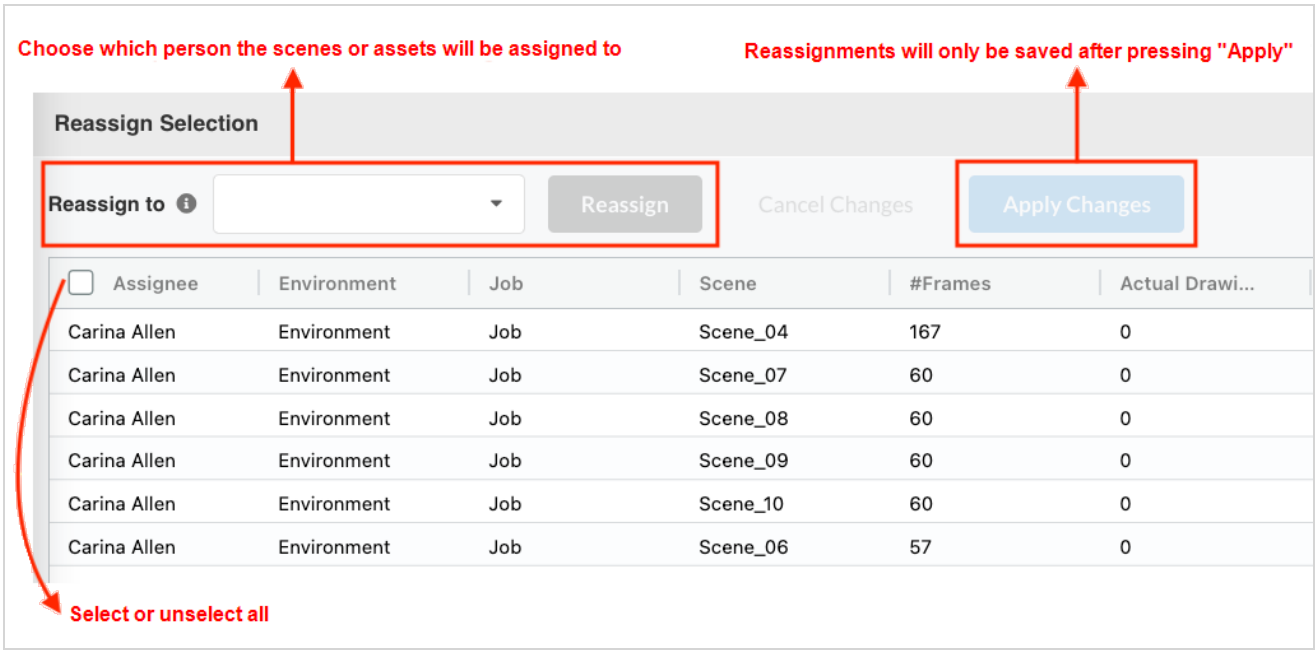


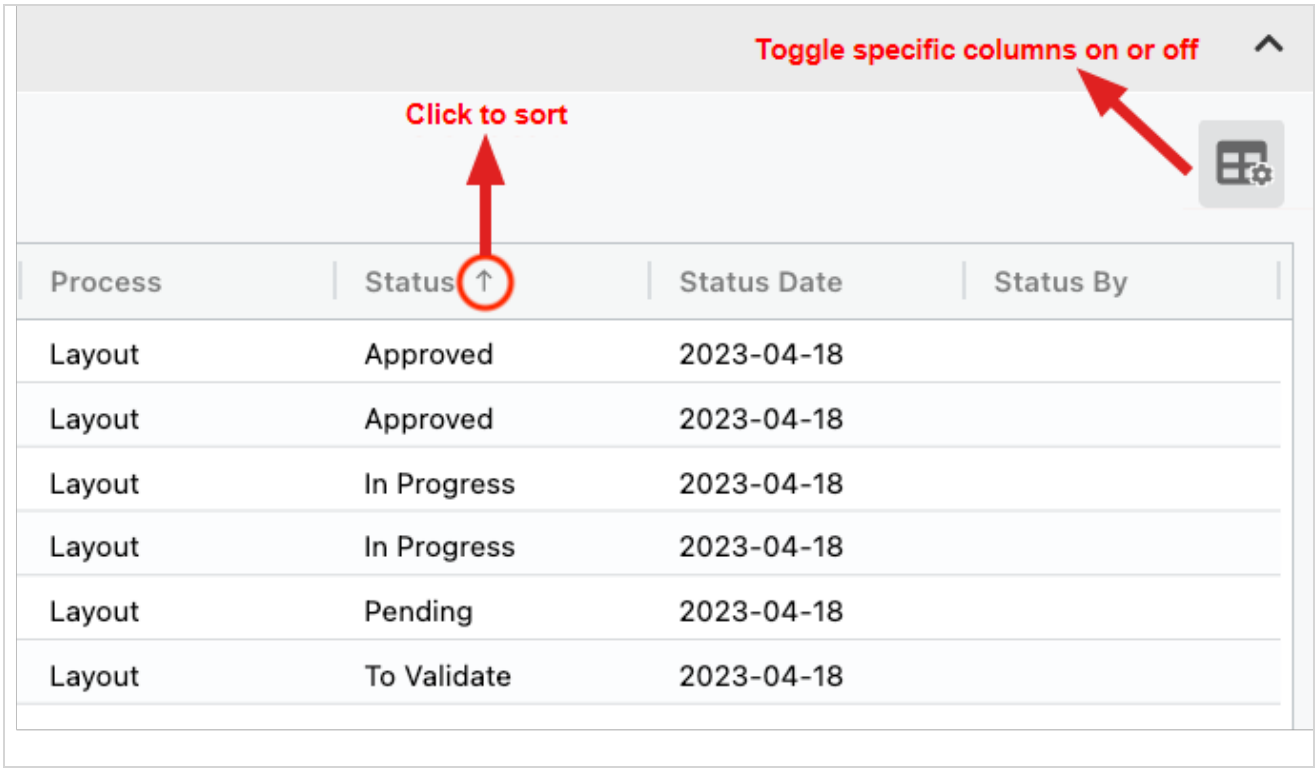
	1	2	3	4	5	6
1	KEY ASSIGNEE	PROCESS				
2	JOB	Layout				
3	SCENE	Distinct Scene	Completed	Started	Remaining	Completion Rate
4	Carina Allen	6	2	4	4	33%
5	Charlie Simmons	0	0	0	0	0%
6	Frank Banner	0	0	0	0	0%
7	Jane Sin	4	3	1	1	75%
8	Wayne Wood	0	0	0	0	0%
9	Grand Total	10	5	5	5	50%

Reassign Selection

Unlike other types of reports, Workload Reports do not have a visual graph to display data.

Instead, there is a “Reassign Selection” section. This allows managers to reassign tasks in the case where assignees have too much or too little work on their plate.





How to analyze a Workload Report

First, create or select a Workload Report. Here is a sample and description of the various areas.

PROCESS GROUP All	PROCESS BY ASSIGNEE All	STATUS All			
	1	2	3	4	5	6
1	KEY ASSIGNEE	PROCESS				
2	JOB	Layout				
3	SCENE	Distinct Scene	Completed	Started	Remaining	Completion Rate
4	▶ Carina Allen	6	2	4	4	33%
5	▶ Charlie Simmons	0	0	0	0	0%
6	▶ Frank Banner	0	0	0	0	0%
7	▶ Jane Sin	4	3	1	1	75%
8	▶ Wayne Wood	0	0	0	0	0%
9	Grand Total	10	5	5	5	50%

NOTE

All headers with a gear icon can be reorganized and be used to filter data. See How to filter data in the reports for more information.

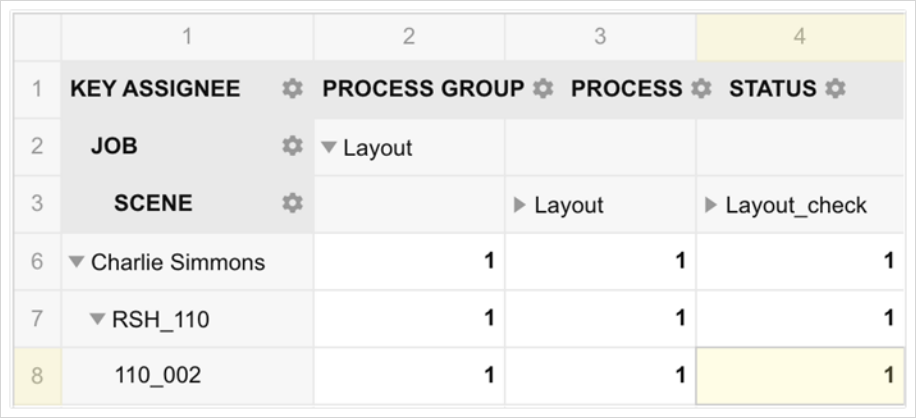
Vertical headers description:

- **Key assignee**: This first column lists the assignees of the various manual (non-approval) tasks.
- **Job**: Clicking on the triangle icon preceding an assignee will expand to show the names of the jobs containing tasks assigned to that user.
- **Scene**: Clicking on the triangle icon preceding a job name will expand to show the names of scenes within that job that are assigned to that user.

- **Horizontal headers description**:
  - **Process**: This header lists the processes present in the scenes' or assets' workflows.
  - **Process group**: Adding this header to the table will show processes by group rather than individually.
  - **Process by Assignee**: This header lists the processes present in the scenes' or assets' workflows while also allowing the display approval processes by assignee.
  - **Status**: Display the statuses of the various tasks.

Key concepts:

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



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

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

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

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

  This workflow would be divided in 3 process groups:

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

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

  Process by Assignee: To simplify the data shown to supervisors, it is possible to view processes by approval assignees. Consider the example below:

PROCESS GROUP All | STATUS All | PROCESS All

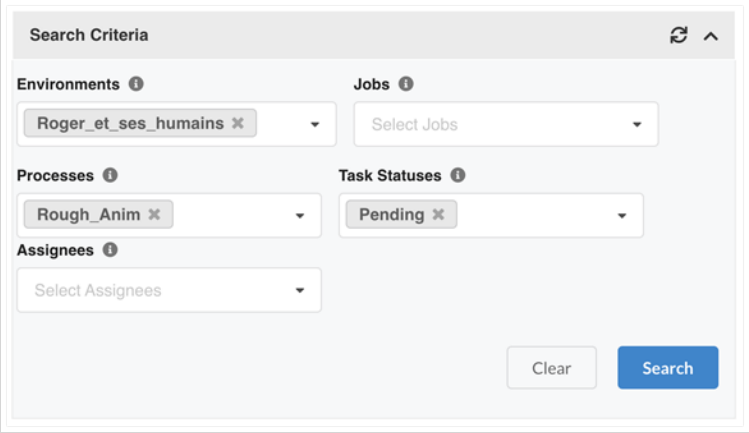
	1	2	3	4	5	6
1	KEY ASSIGNEE	PROCESS BY ASSIGNEE				
2	JOB	Layout_Check: Jade Jonah				
3	SCENE	Distinct Scene	Completed	Started	Remaining	Completion Rate
4	Carina Allen	3	1	1	2	33%
5	Jane Sin	4	3	1	1	75%
6	Grand Total	7	4	2	3	57%

This table shows the data for Carina Allen and Jane Sin, who are both working on tasks to be checked by Jade Jonah. With this report, Jade Jonah can easily track the workload of each member of their team.

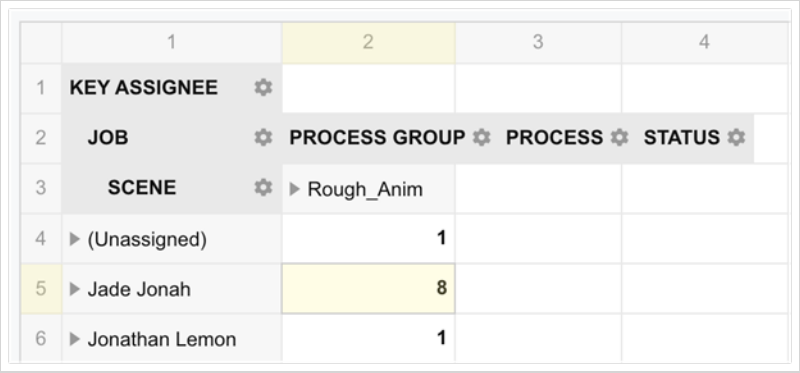
How to reassign tasks using the Workload Manager

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

1. For this example, let's have a single process and a single status as search criteria. Say "Rough_Anim" and "Pending"

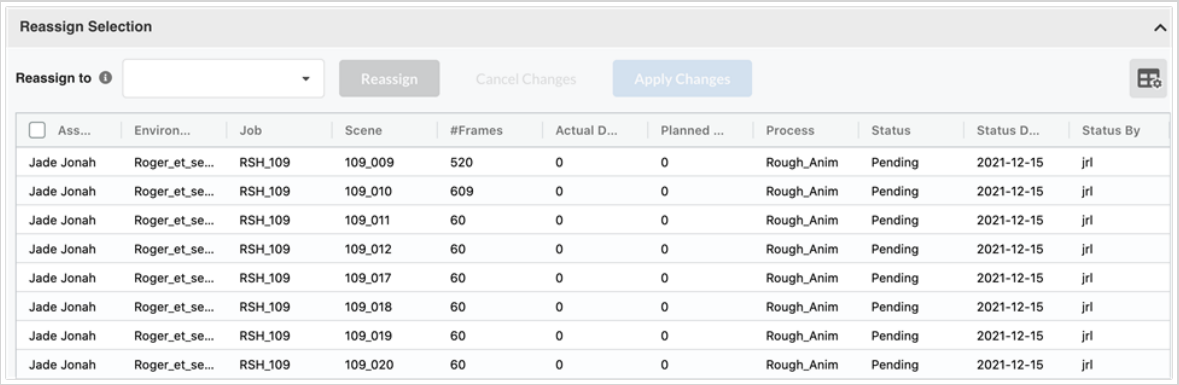


2. Looking at the Report Data, you can tell that Jade has 8 scenes to do while Jonathan has only 1.



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

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

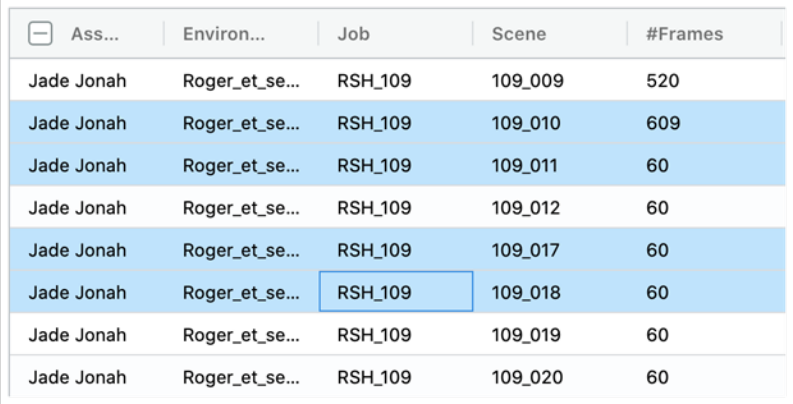


Reassign Selection

Reassign to | Reassign | Cancel Changes | Apply Changes

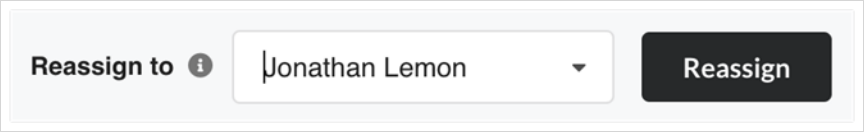
Ass...	Environ...	Job	Scene	#Frames	Actual D...	Planned ...	Process	Status	Status D...	Status By
Jade Jonah	Roger_et_se...	RSH_109	109_009	520	0	0	Rough_Anim	Pending	2021-12-15	jrl
Jade Jonah	Roger_et_se...	RSH_109	109_010	609	0	0	Rough_Anim	Pending	2021-12-15	jrl
Jade Jonah	Roger_et_se...	RSH_109	109_011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

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

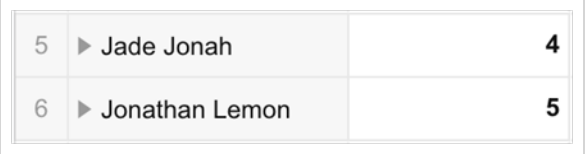


Ass...	Environ...	Job	Scene	#Frames
Jade Jonah	Roger_et_se...	RSH_109	109_009	520
Jade Jonah	Roger_et_se...	RSH_109	109_010	609
Jade Jonah	Roger_et_se...	RSH_109	109_011	60
Jade Jonah	Roger_et_se...	RSH_109	109_012	60
Jade Jonah	Roger_et_se...	RSH_109	109_017	60
Jade Jonah	Roger_et_se...	RSH_109	109_018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

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



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



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

Chapter 13: Producer Link

Producer Link is a desktop application allowing you to upload preview files as well as link assets to Producer from your computer. The desktop application can be downloaded from the Downloads and Resources section of Producer and installed locally for each user who will need to use Producer Link.

Producer Link

Web applications such as Producer cannot access files on a computer, unless a specific file is uploaded. Producer Link bridges the communication between Producer and local files.

The Producer Link desktop application can be used directly with Producer without the need of Harmony or Harmony Server. It can be used to link files such as PSDs as well as open the linked PSD files directly from Producer. It can also be used to create scenes generated in Storyboard Pro as well as uploading the matching preview movies. Finally, it can also be used to link scene snapshots such as Maya projects.

NOTE

Assets are linked to Producer from your external centralized repository. Only preview files such as thumbnails and movie preview are uploaded to Producer.

In addition to handling uploading assets from CSV, external Assets, scene snapshots, or StoryboardPro import, the user can manage, open and export offline scenes. Please refer to the following sections in the documentation for more information on each topic:

Installing

Logging in

Interface

Configuration

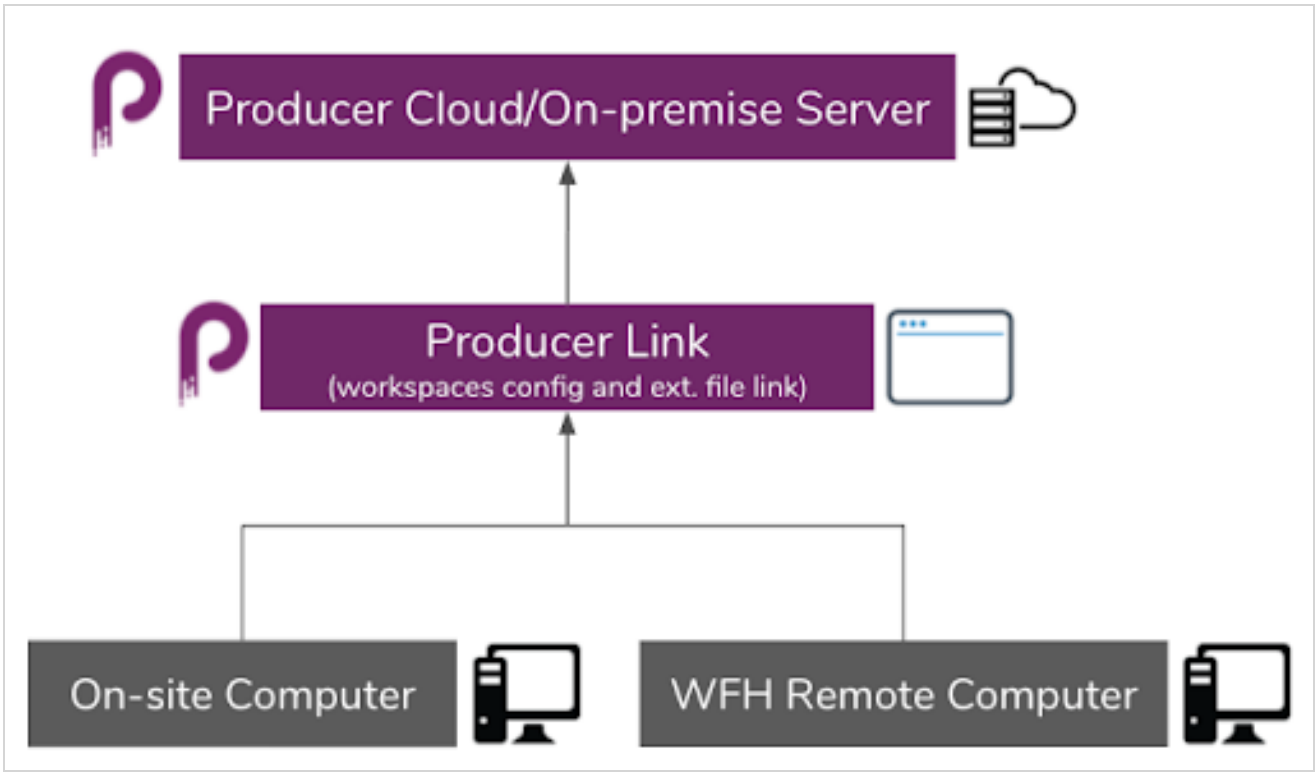
Uploading Assets

Offline Scenes

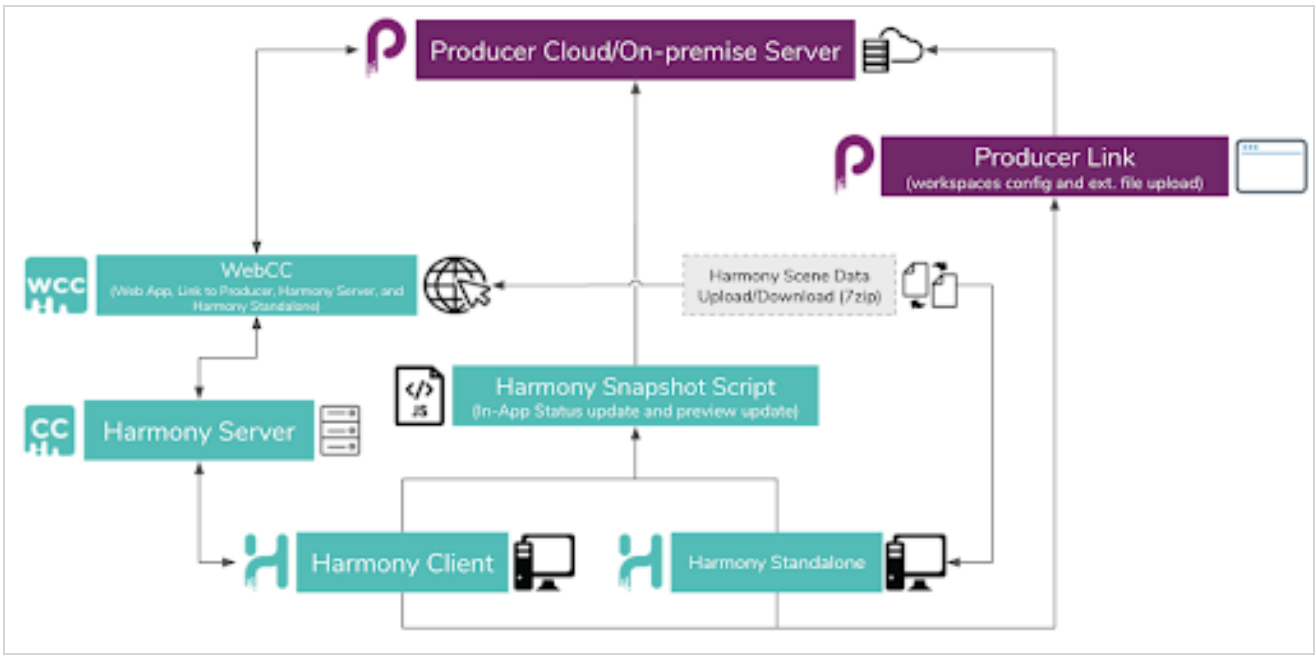
Command Line

Setup Overview

Producer and Producer Link without Harmony Setup



Producer and Producer Link with Harmony Setup

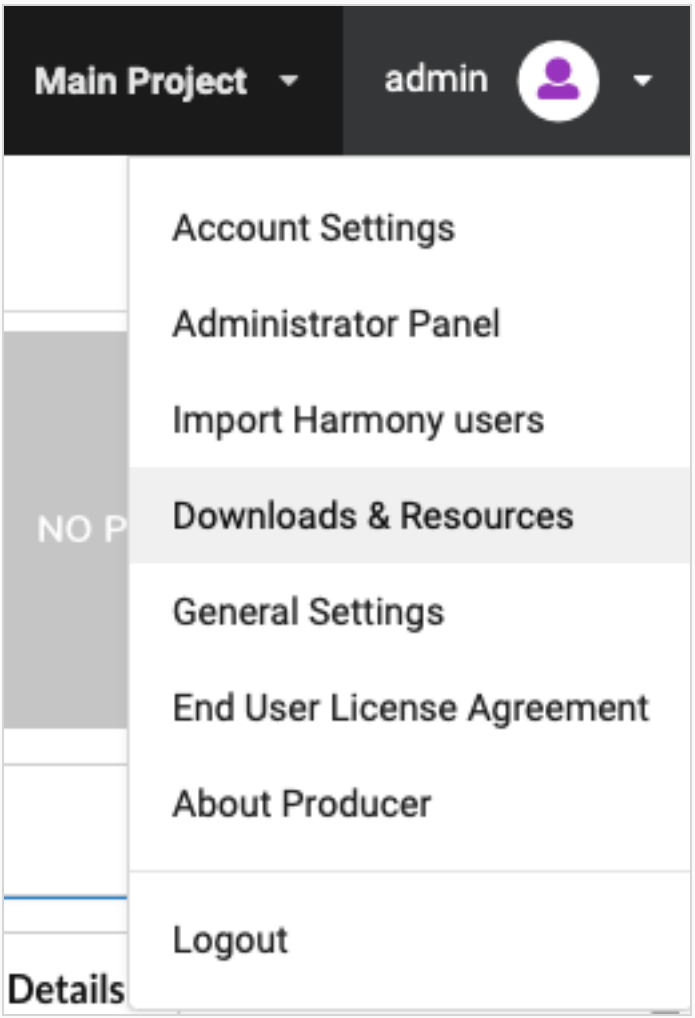


Installing Producer Link

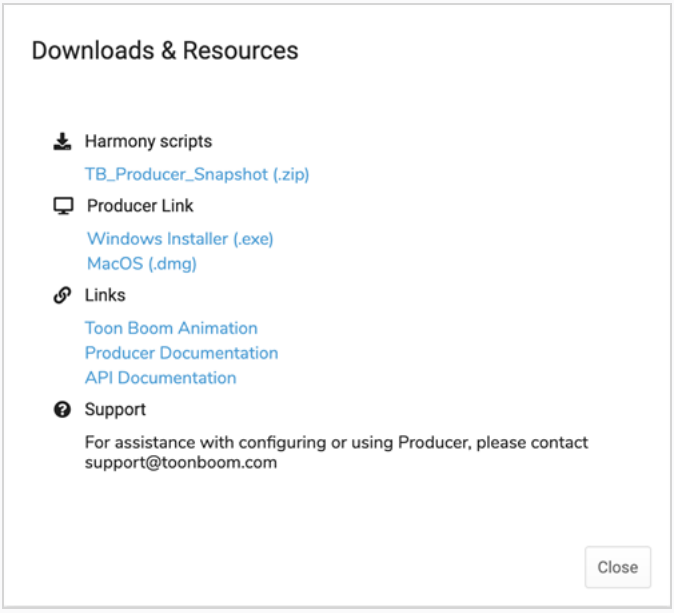
Producer Link installer can be downloaded from the Downloads and Resources section of Producer. It can be installed on Mac (Universal Build) and Windows.

How to install Producer Link

1. Log into your Producer instance.
2. In the user profile drop-down menu, select Downloads & Resources.

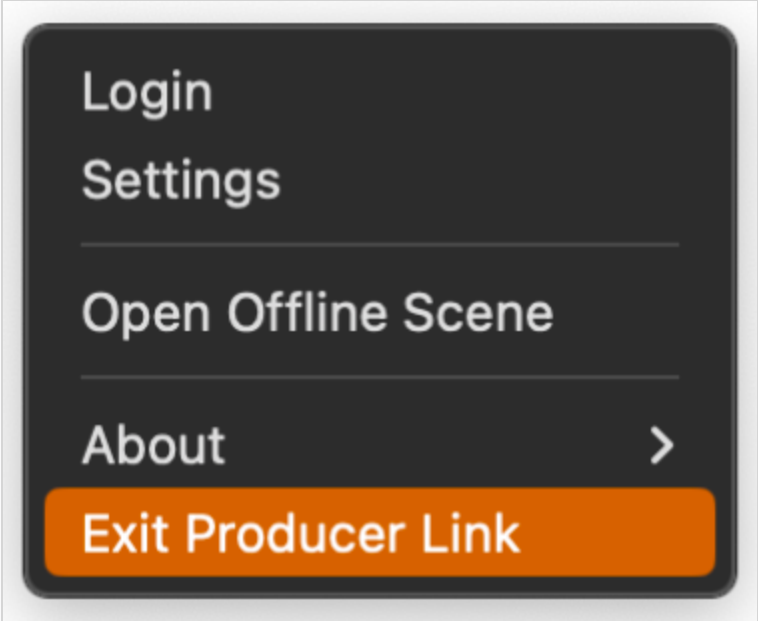


3. In the Downloads & Resources window, click on the Producer Link installer matching your operating system.



4. Once downloaded, click the Close button.
5. Launch the installer and follow the on-screen instruction to install the application.
6. The application can be found here:
    - macOS: */Applications/Producer Link*
    - Windows: *C:\Program Files\Producer Link*

Even when closing the Producer Link interface, the application is still running in the background. To completely stop the application, you must either quit the background process or from the top menu, select Exit.

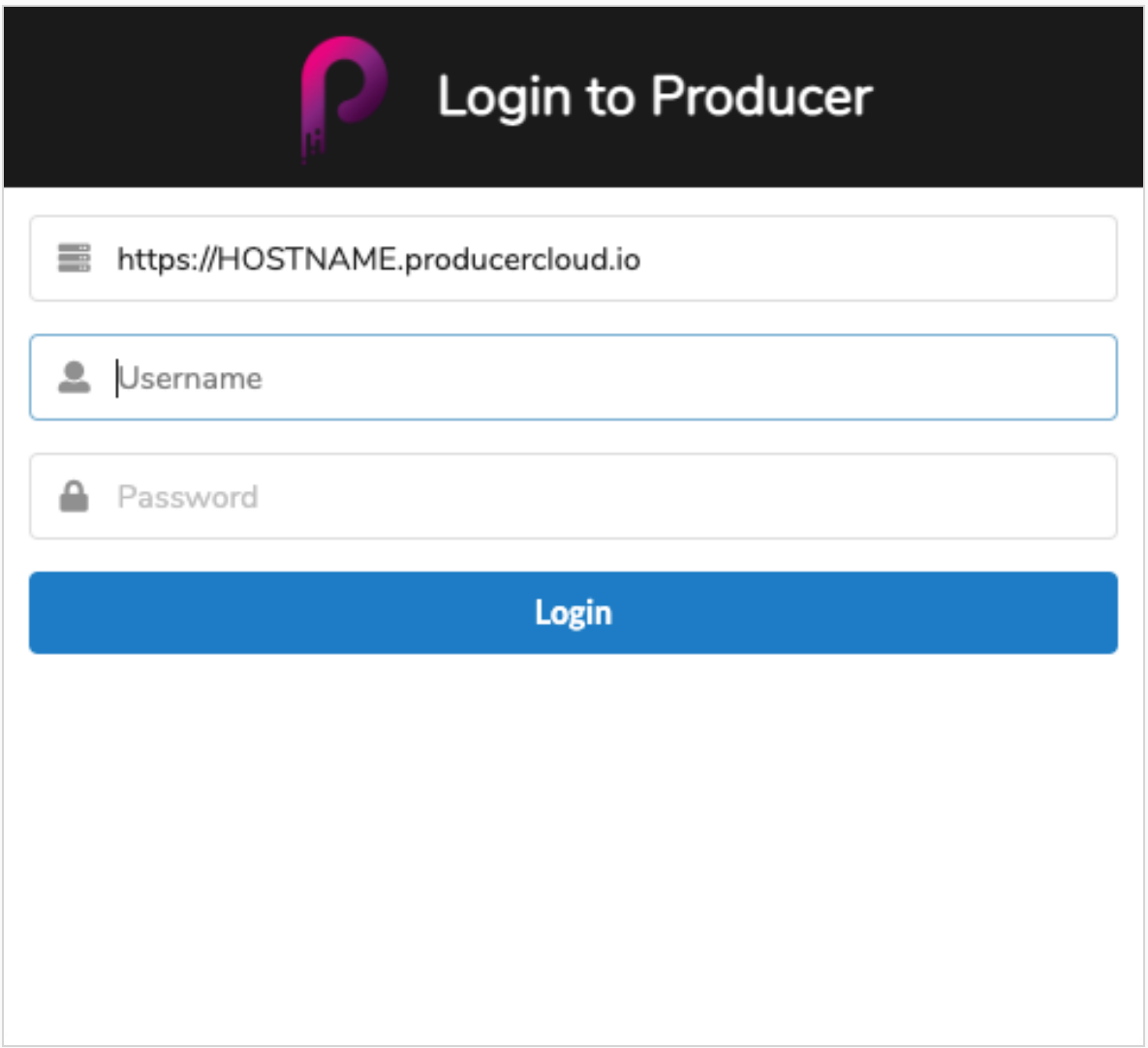


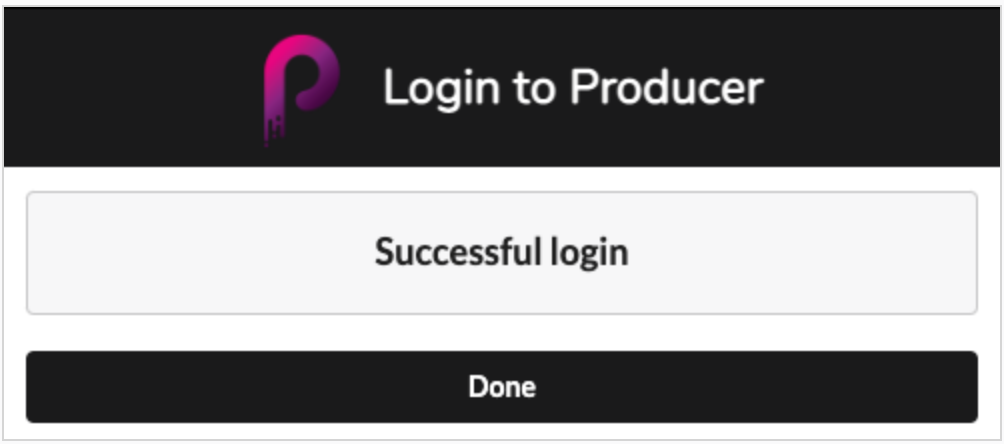
Logging into Producer Link

To access the Producer Link user interface, you must first log into the application using your Producer username.

How to log into Producer Link

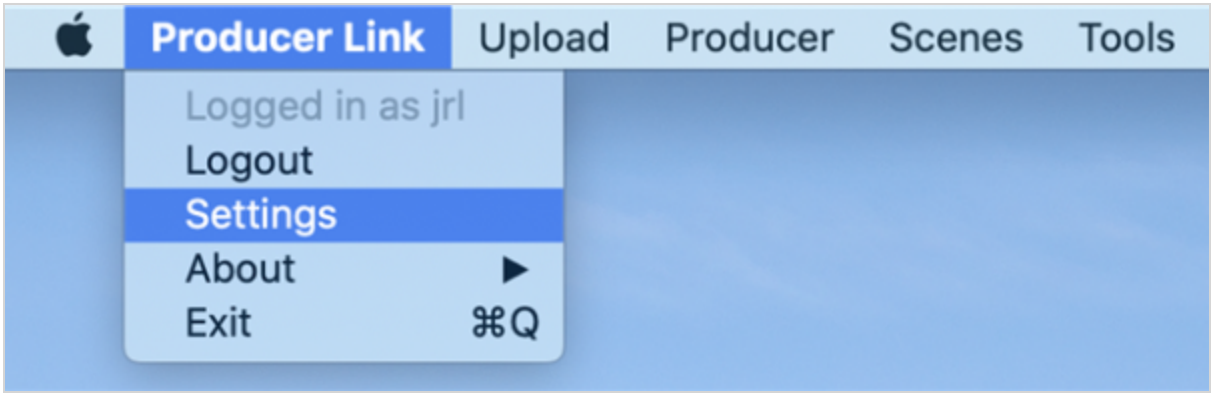
1. In the URL field, type the address to your Producer instance.
2. In the Username field, type your Producer username.
3. In the Password field, type your Producer password.
4. Click Login.
5. Once the login is successful, click Done.




Login to Producer
Successful login
Done

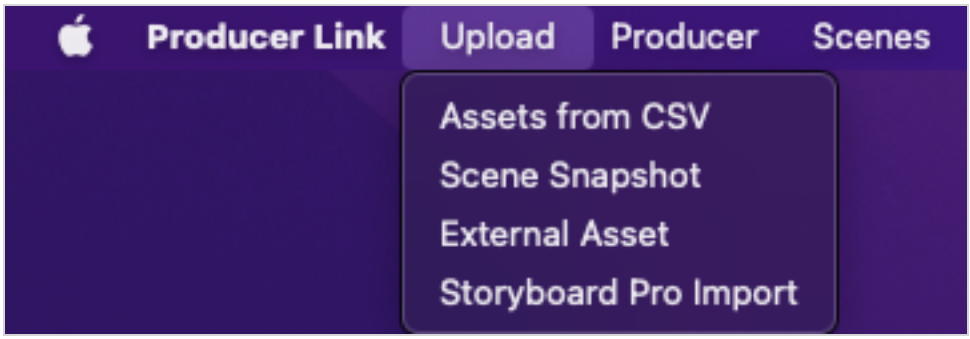
Producer Link Interface

Once logged into Producer Link, you can access various functions via the top menu. You can configure your workspaces using the Settings in Producer Link menu and upload files using the Upload menu.

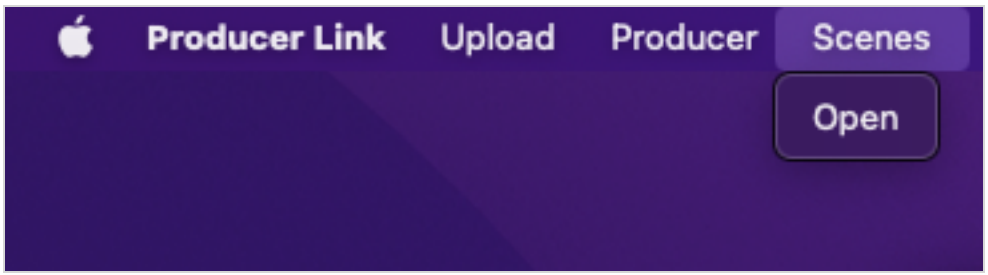


To set up your workspaces, you can click on Settings under the Producer Link menu. For more details, refer to How to create a workspace from the user interface and How to create a workspace using the command line.

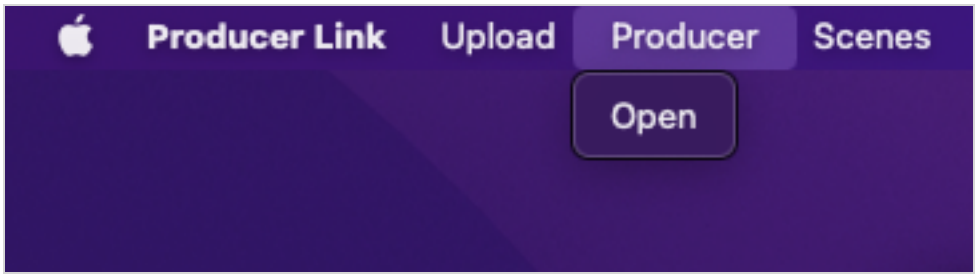
For the Upload menu, you can upload multiple assets from a CSV file, scene snapshots, external assets such as PSDs, and import a scene list and the matching movie previews from Storyboard Pro, see Uploading Assets.



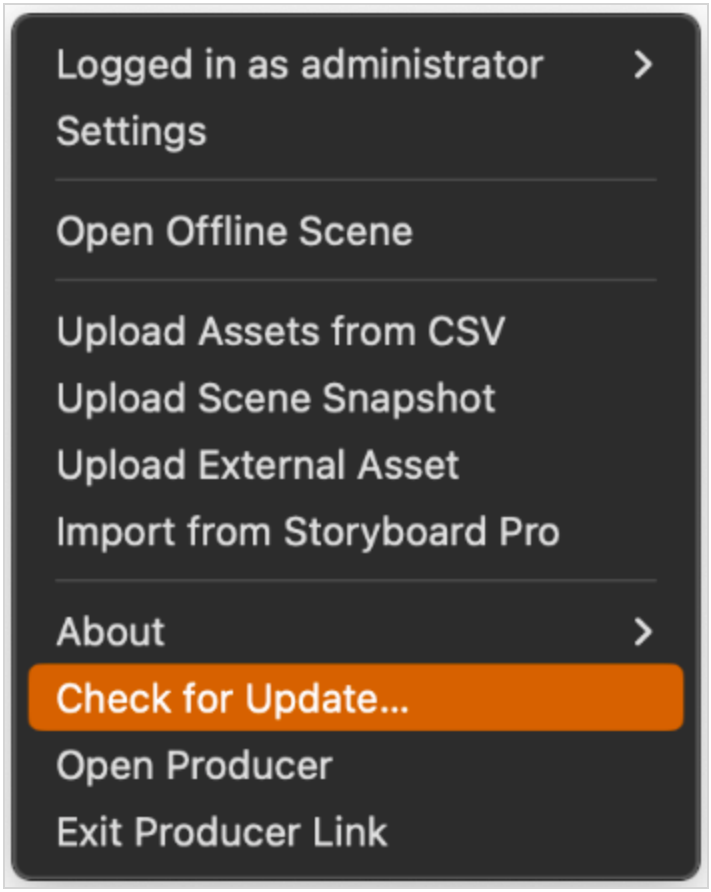
To open Offline Scene page, you can choose “Open” under Scenes. You can use it to manage the opening, exporting and deleting of scenes in the local offline folder. For more details, see Open Offline Scene.



To open Producer web, you can access the Producer menu and choose “Open”.



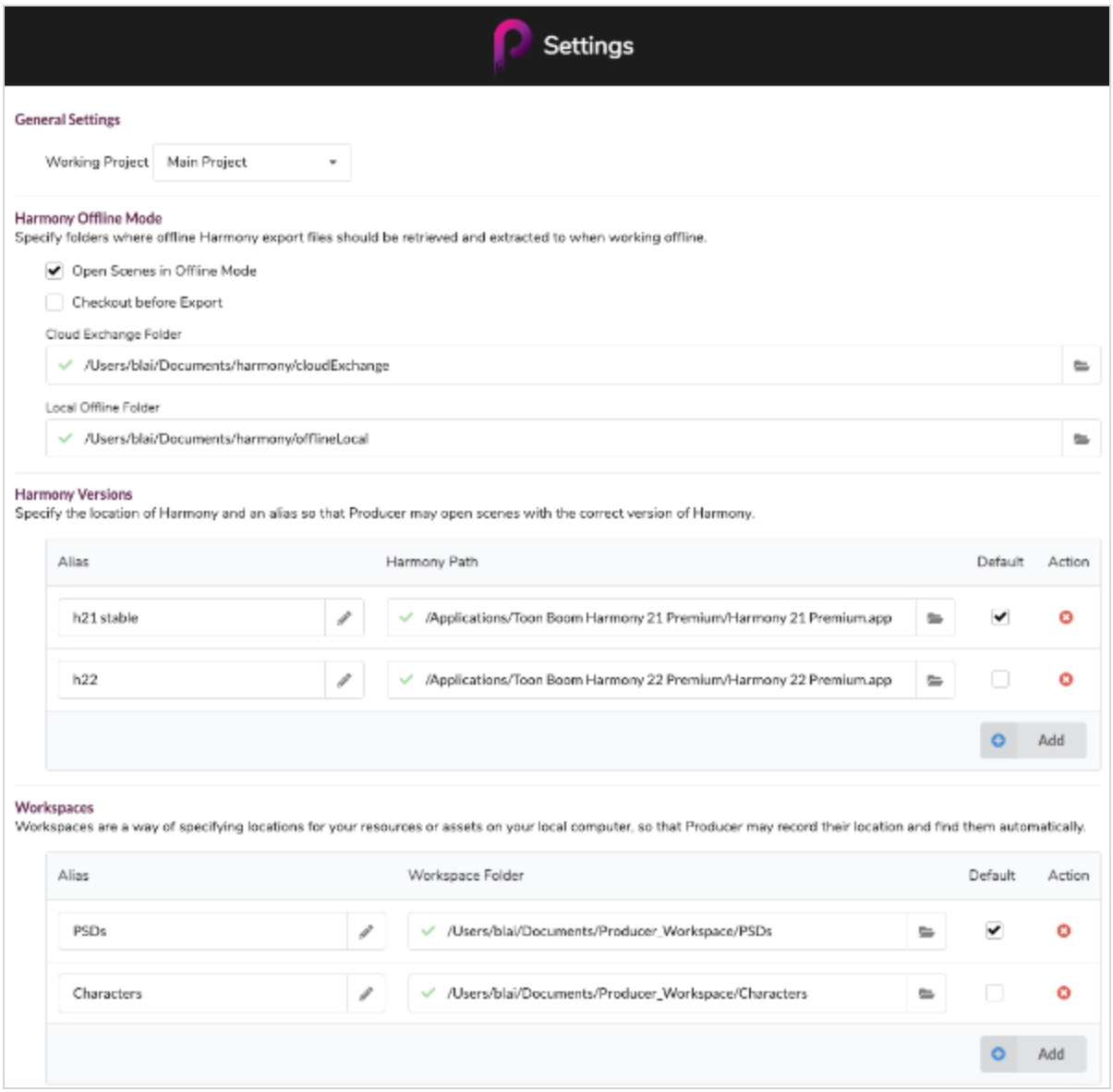
macOS has a Producer Link tray icon allowing you to exit the application, access the version number, and so on.



Configuring Producer Link

Interface

The user can configure many settings in the Settings page.



Settings

Below is a description of each configuration option in the Setting page.

Options	Description
General Settings	

Options	Description
Working Project	This project will determine where Producer Link will look for Environments, Jobs and Scenes.
Harmony Offline Mode	
Open Scenes in Offline Mode	If enabled, clicking on the button from the Production page will export the highlighted scene and launch the Open Offline Scene dialog from Producer Link. If disabled, clicking on the button from the Production page will attempt to open the scene in database mode. (This is only preferable for machines located in the studio.) By default, the Open Scenes in Offline Mode option is enabled.
Checkout before Export	If enabled, the default value of the Export button will be “Check out and Export” (instead of “Export only”).
Cloud Exchange Folder	The Cloud Exchange Folder is a locally mounted folder shared from the cloud which is synchronized with the Harmony Server Exchange Folder. For this option to work, the user will need to install a cloud storage application connected to the studio server, in which every user will have their own subfolder used for exporting their scenes offline. The user folders will act as an intermediate between the studio’ server and the Local Offline Folder described in the next option below. Each user subfolder will contains two subfolders: Exported: The Exported subfolder contains the *.7z and *.7z.props file. Imported: The Imported subfolder contains the *.7z file. **NOTE** Just to name a few, Google Drive and Dropbox can be used as cloud storage applications. The Cloud Exchange Folder option lets the user define where the user cloud storage subfolder is mounted locally. The checkmark icon confirms that the path entered in the textfield is valid and recognized by Producer link. The warning icon indicates that the path entered in the textfield is invalid or that Producer Link was not able to recognize it.
Local Offline Folder	Lets the user define where on his computer the unzipped scene files will be stored to allow him to work in Harmony Standalone.

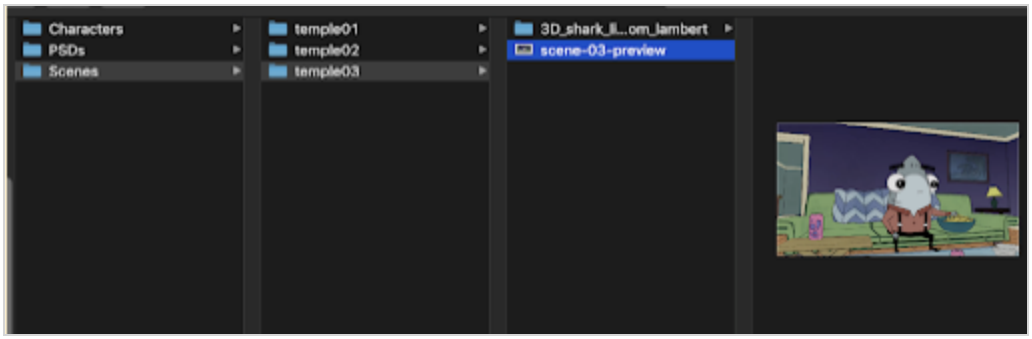
Options	Description
	The checkmark and warning icons are used to confirm the validity of the path entered in the textfield.
Harmony Versions	
Alias	Lets the user write an alias for his Harmony version path. The ID provided within this field does not have any other purpose other than providing a name to differentiate each Harmony Version listed within the Harmony Versions section.
Harmony Path	Here, the user defines the Harmony Premium.app location. The checkmark and warning icons are used to confirm the validity of the path entered in the textfield.
Add	Allows the user to add another Harmony version to the Harmony version list.
Default	Lets the user define which Harmony version will be defined as the default one.
Action	Lets the user remove the Harmony version, by clicking on the Remove Harmony Version button .
Workspaces	
Alias	This field lets the user write an alias for his Workspace Folder path. The ID provided within this field does not have any other purpose other than providing a name to differentiate each workspace listed within the Workspaces section.
Workspace Folder	The Workspace Folder defines the path for a single resource or asset type folder. The more resources or assets that a user will have to play with, the more workspaces will be needed to be defined in Producer Link. The checkmark and warning icons are used to confirm the validity of the path entered in the textfield.
Default	Lets the user define which workspace will be defined as the default one.
Action	Lets the user remove the workspace, by clicking on the Remove Workspace button.
Add	Lets the user add another workspace to the workspace list.

As users will be accessing files from various locations and various computers, the path to those files will be different for most users. For example, files could be stored on a centralized cloud location such as DropBox or a centralized server in the studio. Each computer will have a different path to access these files.

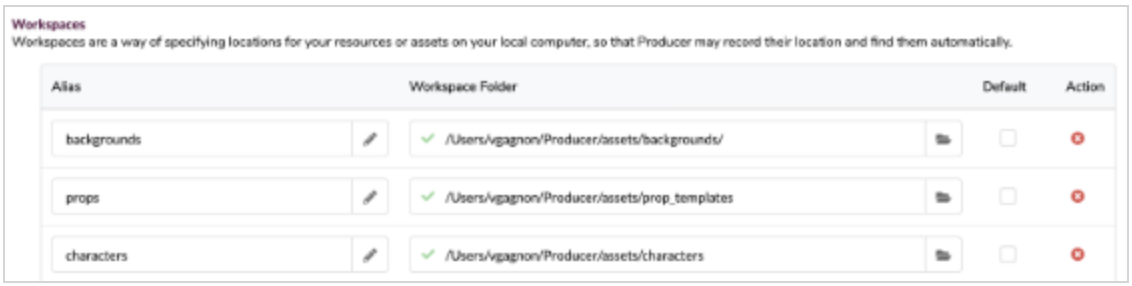
Workspaces

To allow everyone on your team to access and open files, your data such as backgrounds, library assets, Maya projects and so on must be located in a centralized repository accessible by everyone who needs access to it to work. Each computer must be able to access the location via an absolute path that will be configured in Producer Link.

You can have one or multiple repositories. These shared locations are called workspaces. Each location will be identified in Producer with a Workspace alias. The Workspace Alias will then be linked to the absolute path from each computer who will need to access the location.



Everyone will be using the same Workspace aliases, but everyone will most likely be using a different absolute path to access these shared locations from their computers.



Therefore, the first step will be to create this shared space and give access to the users. This is done outside of Producer and Producer Link. This is an internal operation to your organization.

How-Tos

How to create workspaces or Harmony version aliases

To create a new workspace or new Harmony version alias, you can click the Add button and fill in the information for the row. It should auto-save once you click anywhere else in the page. Ensure you have selected a default by checking the checkbox if you have multiple rows.

To configure workspaces using the command line, you can refer to Producer Link Command Line.

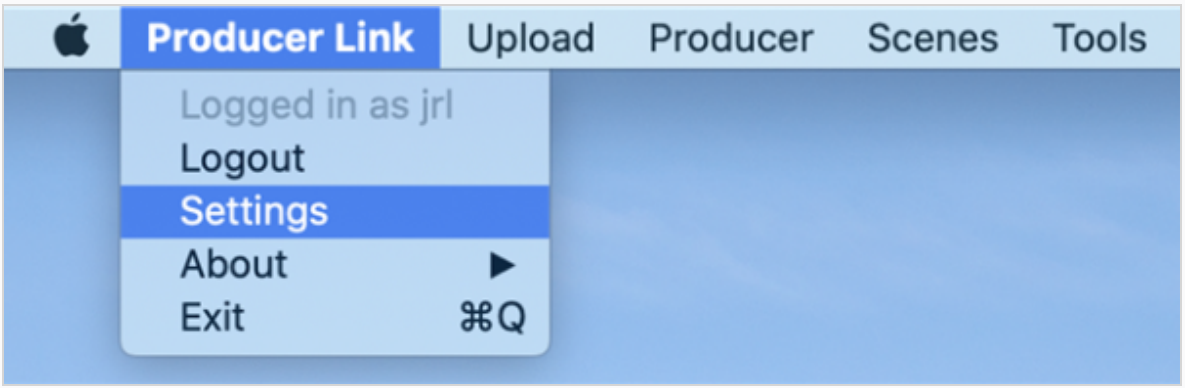
How to configure Producer Link to work remotely on a Harmony Database

To simplify working from home on a Harmony database, a studio using Producer can choose to set up and use the Harmony Offline Mode. See Harmony Integration > Working Remotely. Once the above is completed by a studio system administrator, the user may now configure Producer Link as detailed below.

Once the above is completed by a studio system administrator, the user may now configure Producer Link as detailed below.

1. In Producer Link, make sure you are connected to your Producer instance. If you are not, you should "Login".

2. In Producer Link, open "Settings"



3. Under General Settings, choose the Working Project from the drop-down list.
4. Under Harmony Offline Mode, make sure the "Open Scenes in Offline Mode" option is checked (this is the default value).

5. Enable the “Check out before Export” option if you would like the default value of the Export button to be “Check out and Export” (instead of “Export only”).
6. Still under Harmony Offline Mode, click on the folder icon at the end of the “Cloud Exchange Folder” line and browse to where the cloud folder that was shared with you is mounted on your machine. This should be a subfolder named after your Harmony username.

> **NOTE**
>
> The path may appear slightly different from the sequence of folders you have just browsed since some cloud storage services may use “shortcuts”. This is no cause for concern.

7. Under Harmony Offline Mode, click on the folder icon at the end of the “Local Offline Folder” line and browse a folder of your choosing where offline scene files will be stored and uncompressed on this remote computer to work in Harmony Standalone.

Creating Workspaces

How to create workspace from the user interface

1. Launch Producer Link.
2. In the top menu, select Producer Link > Settings.
3. Click the Add button.
4. In the alias field, type the alias of the new workspace and click on the folder icon to pick the corresponding folder path.
5. It should auto-save once you click anywhere else in the page. Ensure you have selected a default by checking the checkbox.

How to delete a workspace

Launch Producer Link.

In the top menu, select Workspaces > Edit.

Beside the workspace to delete, click the Delete Workspace button.

How to create a workspace using the terminal or command prompt

You can set up your workspaces directly with command lines instead of using the user interface. Use the following command to configure workspaces:

- macOS: ./Producer\ Link config --set-workspace WorkspaceName --root /path/to/my/workspace
- Windows: “Producer Link.exe” config --set-workspace WorkspaceName --root /path/to/my/workspace

where you replace WorkspaceName with the name of the location where your assets will be located and /path/to/my/workspace with the root path to that folder.

Configuring Harmony Server to Recognize Workspaces

Once your workspaces are created, you can export the configuration from Producer Link as a json file. That json file needs to be copied on the Harmony Server in the USA_DB directory. The paths in the json file must be paths that can be accessed from the Harmony Server so that assets can be baked into Harmony scenes during the Assembly (Scene Setup) process.

Note that if you create new workspaces, you will need to reexport a new json file.

To learn more about assembly, see About Assembly and to learn more about baking, see About Sending Assets to Harmony (Baking).

How to configure Harmony server for baking

1. Completely close Producer Link, including the back-end process.
2. On the Harmony Server, in the Terminal or Command Prompt, browse to Producer Link.
3. Use the following command to export the workspaces as a json file:
    - Mac OS: ./Producer\ Link config --export-workspaces
    - Windows: “Producer Link.exe” config --export-workspaces
4. Once the json file is exported, a message is displayed indicating the path where the file has been saved. Browse to that path to find the file.
    - Example: Your WebCC workspaces have been written to /Users/username/workspaces.json
5. Copy and paste the workspaces.json file to /USA_DB. The file has to be located on the Harmony Server at the root of USA_DB.
6. You can open the json file to verify that the paths are accessible from this location. If the paths are not accessible, the baking process will fail.

Uploading Assets

Using Producer Link, you can upload assets directly to Producer from your local computer. Harmony is only required if you are uploading assets created with Harmony. WebCC is not required for the upload. Producer Link communicates directly with Producer.

In order to link assets and upload previews, workspaces need to be configured. See Configuring Producer Link.

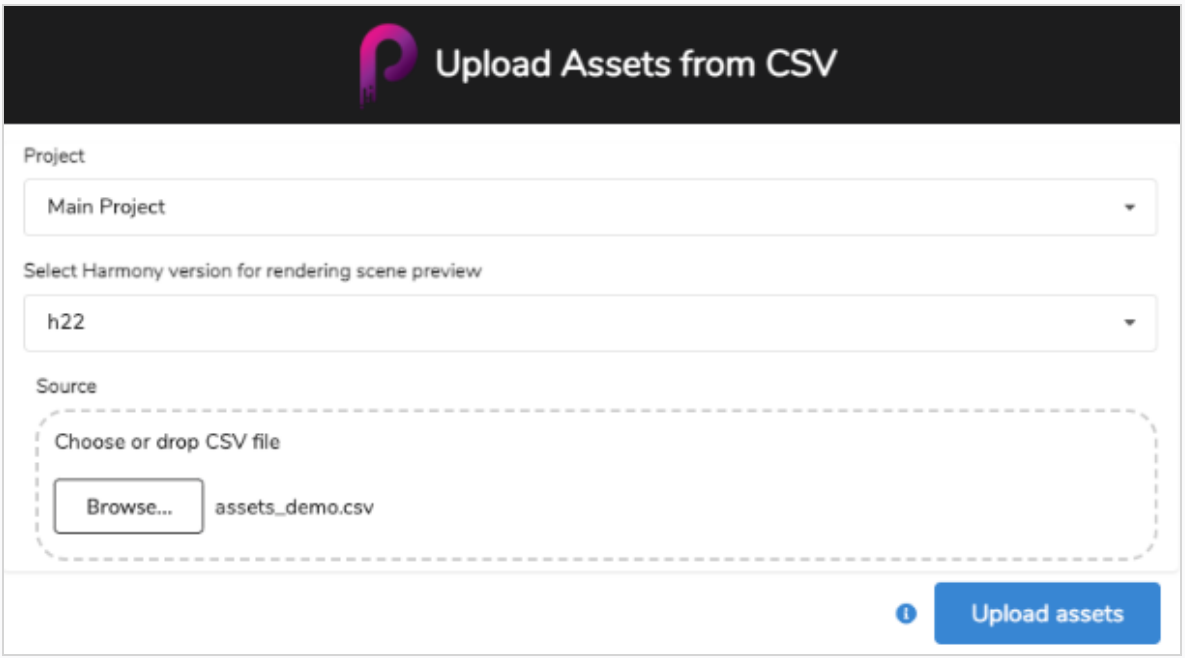
Uploading Assets from CSV

Upload Assets from CSV can be used to provide Producer with a list of assets to create and previews to upload. This process is very useful when you have a series of existing assets, such as hundreds of backgrounds and would like to load them in Producer in a single operation.

- The actual source file, specified by the \"Relative Path\", will not be uploaded but its path will be registered for later access.
- The Thumbnail will be uploaded.

How to upload CSV files with thumbnails

1. In the top menu, select Upload > Assets from CSV.
2. In the Project field, select the Producer Project. This is not the environment. Assets are global to the Producer project.
3. In the Source field, browse or drag and drop the CSV file containing the list of assets to be uploaded.
4. Select the Harmony version alias you have set up in the Settings page.
5. Click Upload Assets.



CSV Format Specifications

The CSV field delimiter is a semicolon (or comma). The first line of the CSV must contain the various field names.

The following fields are recognized (case insensitive):

Field	Description
Asset Name	It is a mandatory field, unless an asset code is specified.
Asset Code	It is used to update an existing asset.
Workflow Code	To determine which workflow will be used with this asset. **NOTE** This cannot be used to update existing assets.
Type	Must match an existing asset type - Optional.
Category	Must match an existing asset category - Optional.
Workspace Id	Workspaces are predefined using Producer Link.
Relative Path	Path of the source file for the asset, relative to the Workspace. In the case of a Harmony Standalone template, must point to the **`.xstage`** file.
Thumbnail Path	Absolute Path of a file to be uploaded and used as thumbnail in Producer.
Process Name	Specify the process for the uploaded asset and note.
ExternalRef Type	Use one of these two ExternalRef Types: • Harmony Standalone (Standalone scene used to build a template) • ref (any other type, such as third party software images)
Note	Note for the asset. Quote your note e.g. \"Your note,;\" so that , or ; are not recognized as separators.
Note Attachment Path	Absolute path of a note attachment.

Sample CSV

Sample CSV

```
Asset Name;Workflow Code;Workspace Id;Relative Path;Thumbnail Path;Process Name;ExternalRef Type;Note;Process;Note Attachment Path

bg_ep_002_324;main_project/bg__TB_DEFAULT;Workspace_name;Subdirectory/source Note;Breakdown;/full/path/noteAttachment.ext
```

Uploading Scene Snapshot

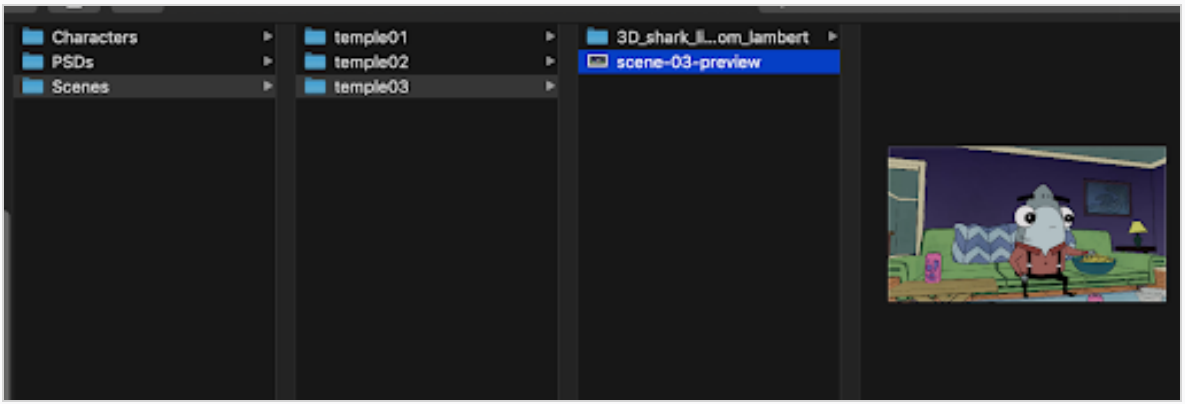
Scenes are any files that are used to build your scenes such as Harmony standalone files, Maya projects, movie files, and so on. You can use the Upload Scene Snapshot to link Producer to the scene files on your centralized repository as well as uploading the matching preview. Once the Scene file is linked, you can open the file directly from Producer, regardless if the application is Harmony, Maya, Photoshop, or any other tool you are using in production.

To upload scene snapshots, a workspace must be defined in the centralized repository. See How to create a workspace from the user interface.

How to upload a scene snapshot

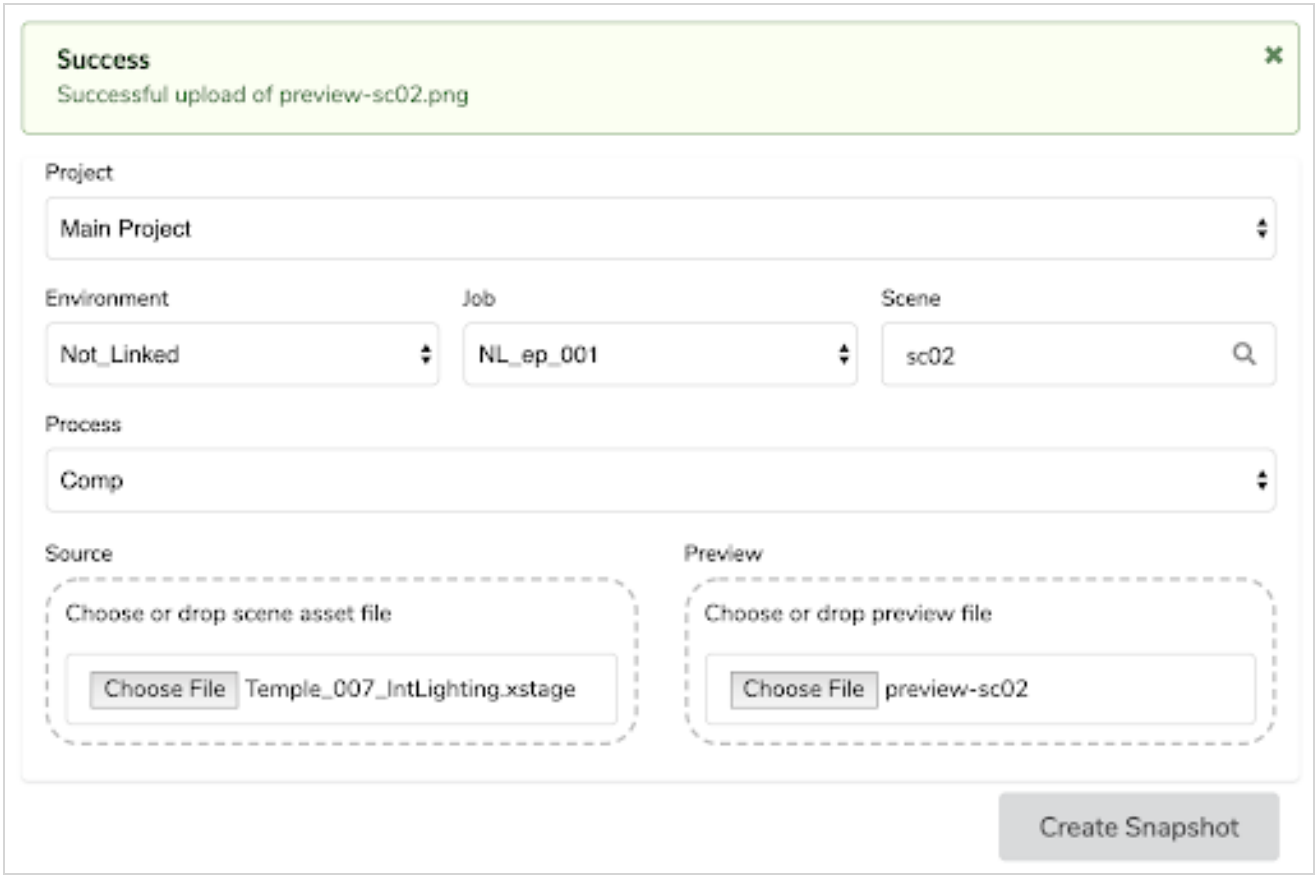
1. In the top menu, select Upload > Scene Snapshot.
2. In the Project field, select the Producer project containing the Environment you are uploading to.
3. In the Environment field, select the corresponding environment.
4. In the Job field, select the corresponding job (episode, sequence, etc.).
5. In the Scene field, select the scene you are linking an asset to. As you start typing the name, existing scenes will be populated. Note that the scene must already exist in Producer.
6. In the Process field, select the Process (task) you are linking your scene asset to.
7. In the Source field, click Choose File and browse to the location of the file you are linking. If it is a Harmony file, select the **`*.xstage`** file. If it is a Maya file, select the *.ma file. The executable file must be selected in order for Producer to launch the application and open the file later on. See Opening an Asset from Producer.

> **NOTE**
>
> The file you are looking for must be located within the workspace (shared location). If not, an error message will be displayed.

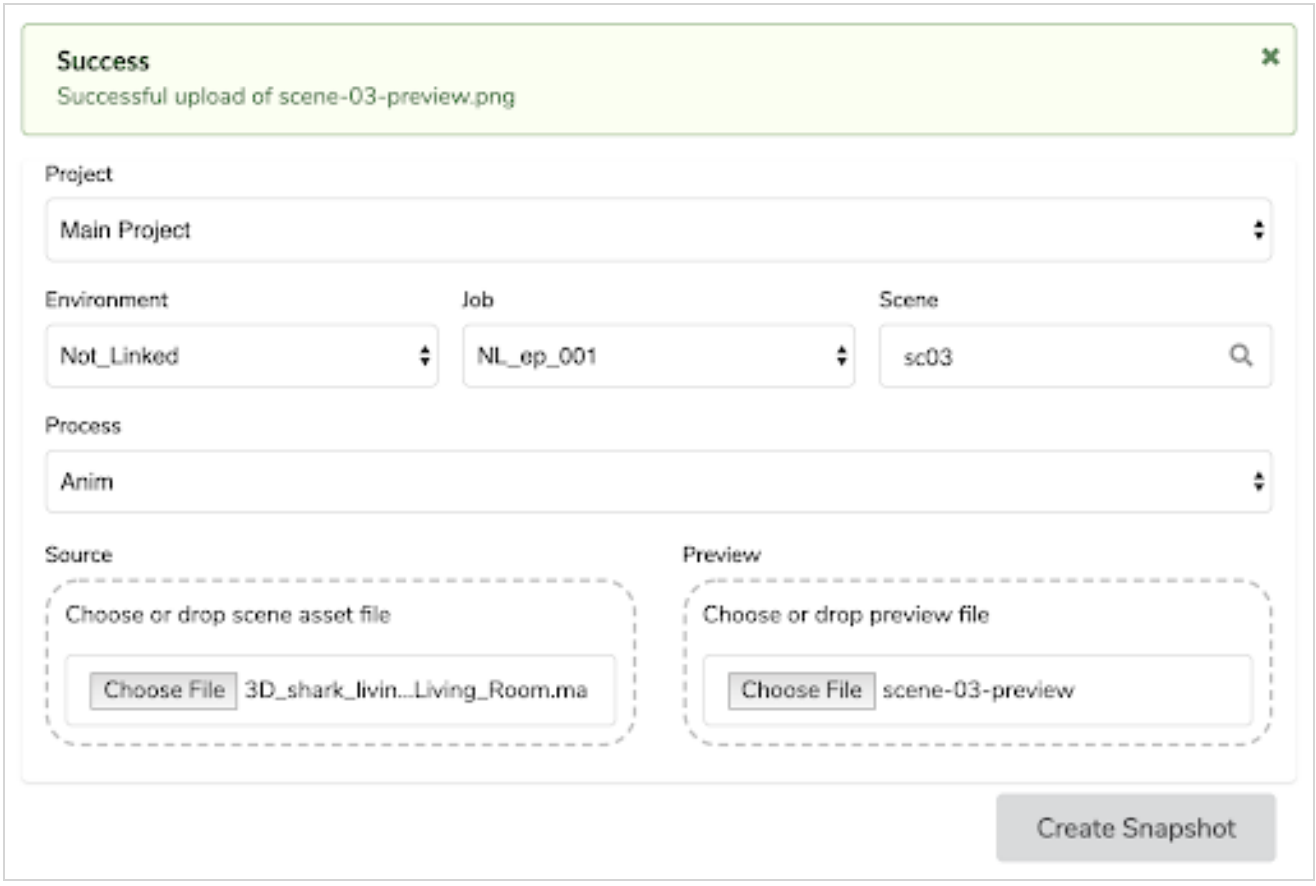


8. In the Preview section, browse for a flattened image, such as a PNG or JPG, to preview what the file is in Producer.
9. Click Create Snapshot.

Example with a Harmony File



Example with a Maya File

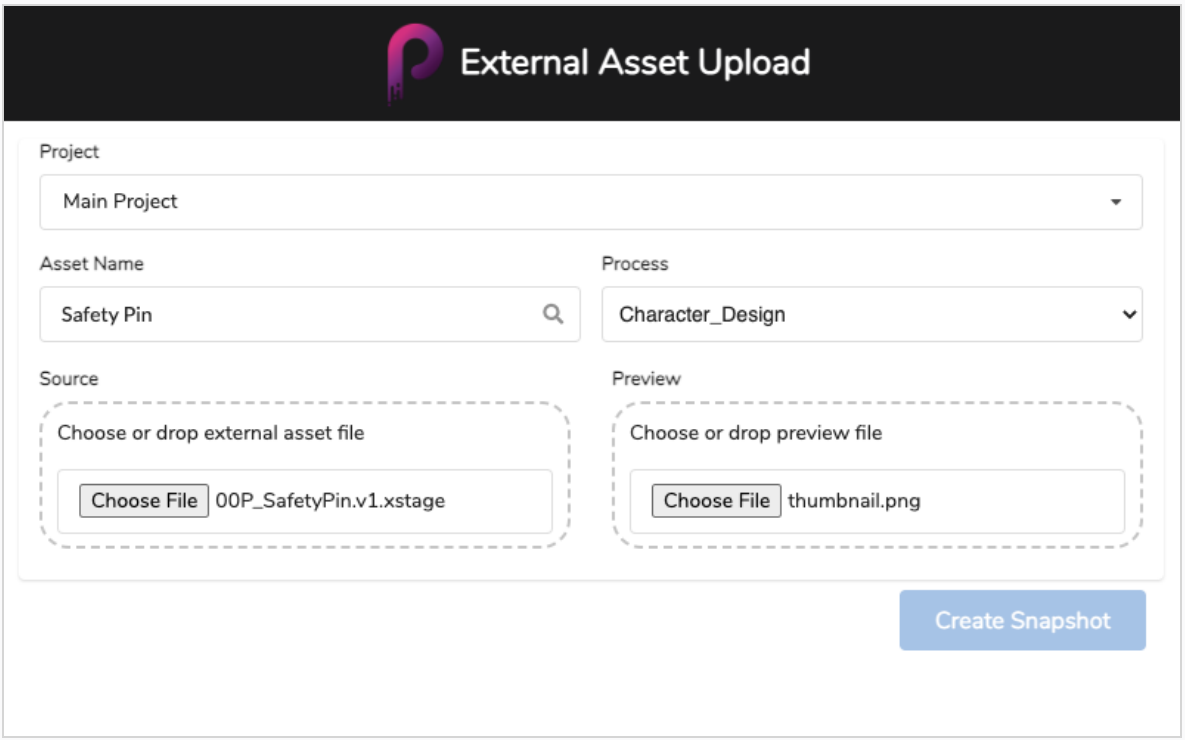


Uploading External Assets

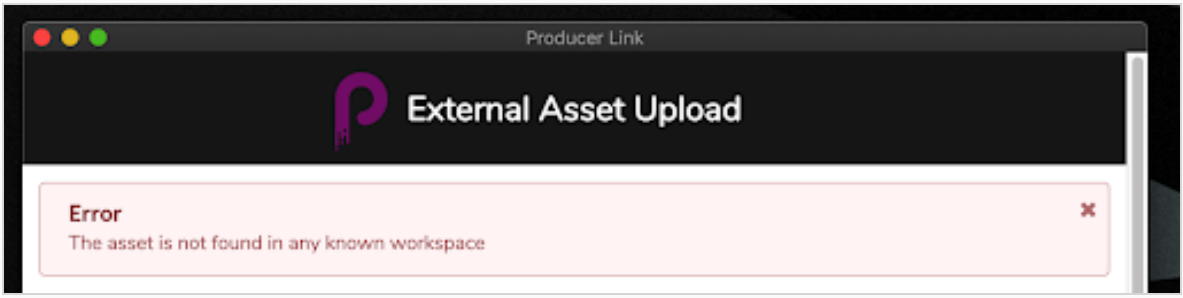
You can link external assets such as background PSDs or Harmony templates to Producer and upload a preview for it. These assets can then be directly opened from Producer or baked in a Harmony scene. To upload an external asset to, the asset must first exist in Producer. To learn how to create assets, see Creating Assets.

How to upload an external asset

1. In the top menu, select Upload > External Asset.
2. In the Project field, select the Producer project. This is not the environment. Most of the time, you will select Main Project unless a different Producer project has been created.

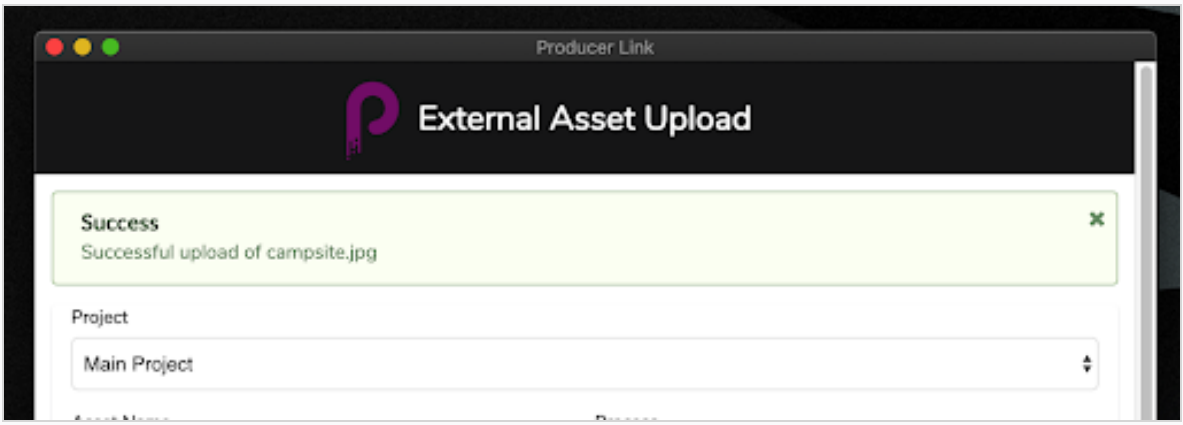


3. In the Asset Name field, start typing the name of an existing asset (already in Producer). As you type the name, existing assets will be displayed in the drop-down menu. Select the matching asset.
4. Once the asset name is selected, in the Process field, the matching workflow tasks appear. Select the task matching your upload.
5. In the Source section, click the Choose File button to browse for the file to upload. Note that the asset has to be located within the set workspace. If you select a file outside of the workspace, the upload will result in an error.

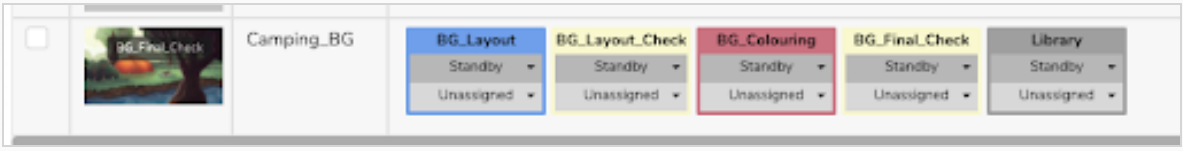


6. In the Preview section, click the Choose File to select a flattened image such as a PNG or a JPG to display the preview in Producer.
7. Click Create Snapshot.

   Once the process is complete, a success message appears.



In Producer, the file is linked and the preview file is uploaded and updated.

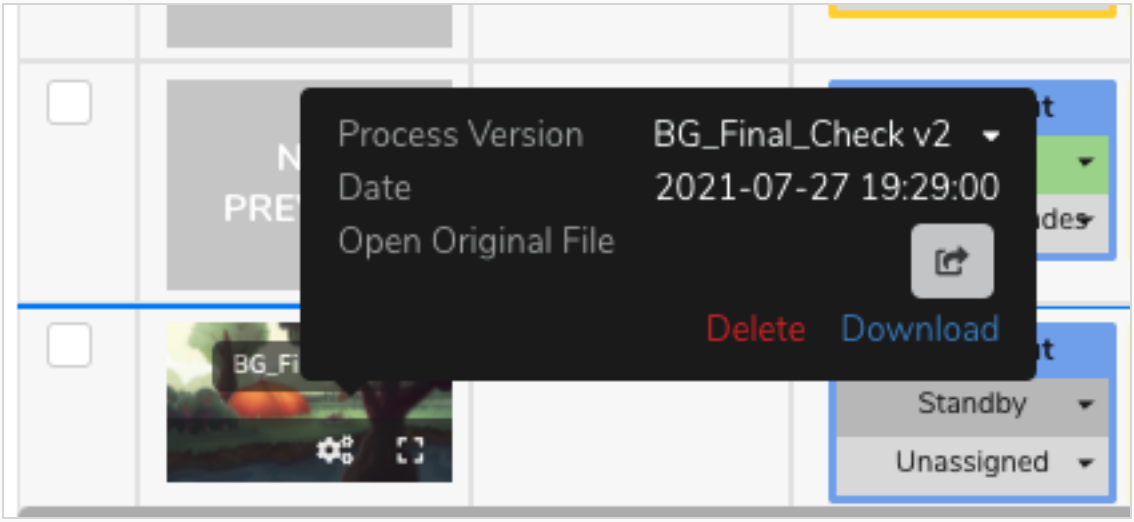


Opening an Asset from Producer

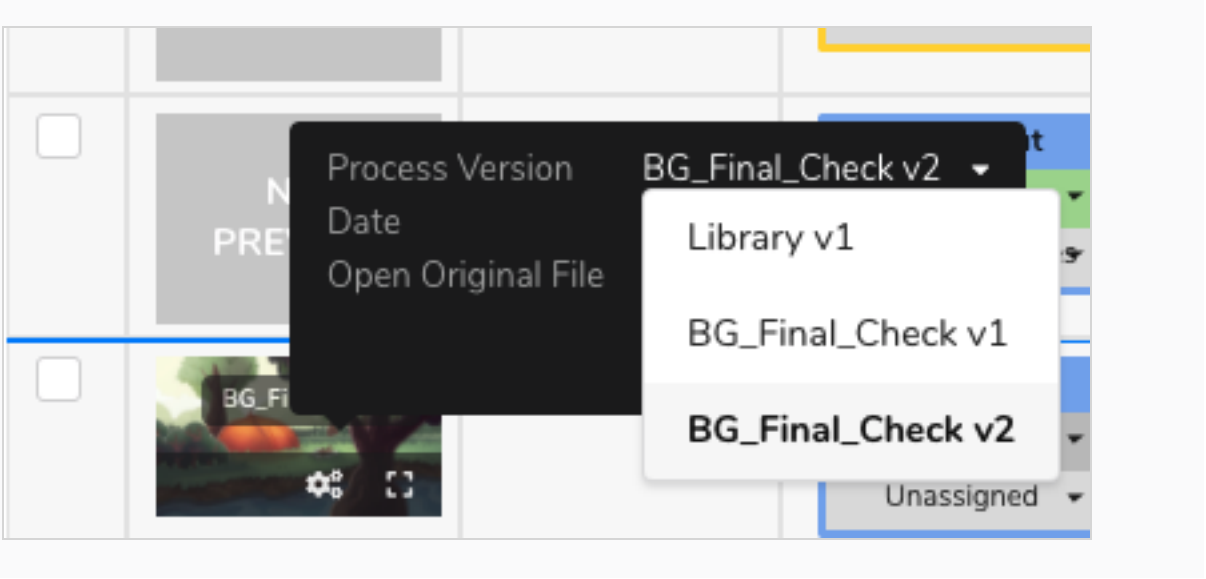
Once a file is linked via Producer Link, it can be opened directly from Producer by opening the Settings window of that asset.. It can also be downloaded and deleted. From that same settings section, previously uploaded versions can be accessed.

How to open an external asset

1. In the Asset list, hover over the asset preview.
2. Click the Settings Gear icon.
3. In the pop-up window, click the Open File icon. If you would like to download the asset, click **Download**.
4. Once you click Open File, you will be prompted to open Producer Link. Confirm the request to open Producer Link.



5. To access previous versions, click the Process Version drop-down arrow.

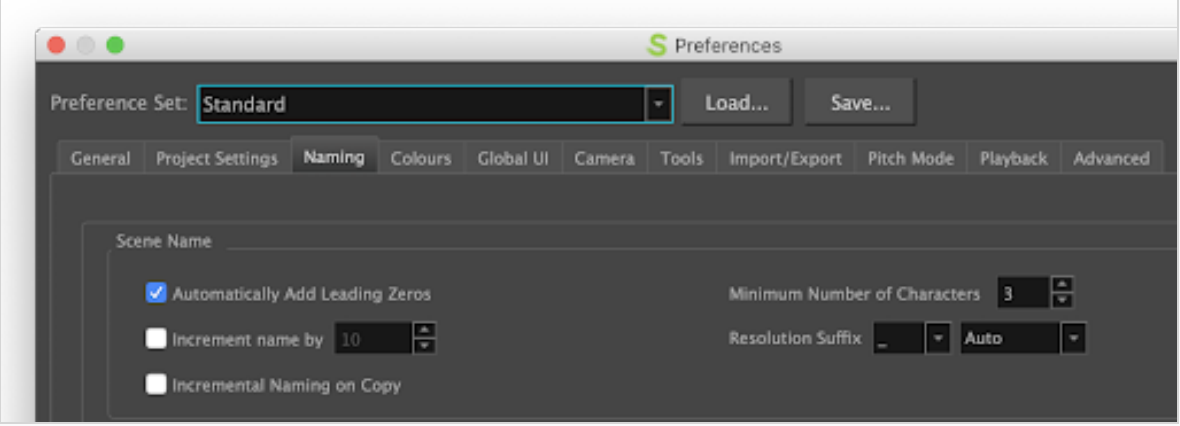

Process Version
Date
Open Original File
BG_Final_Check v2
Library v1
BG_Final_Check v1
BG_Final_Check v2
Unassigned

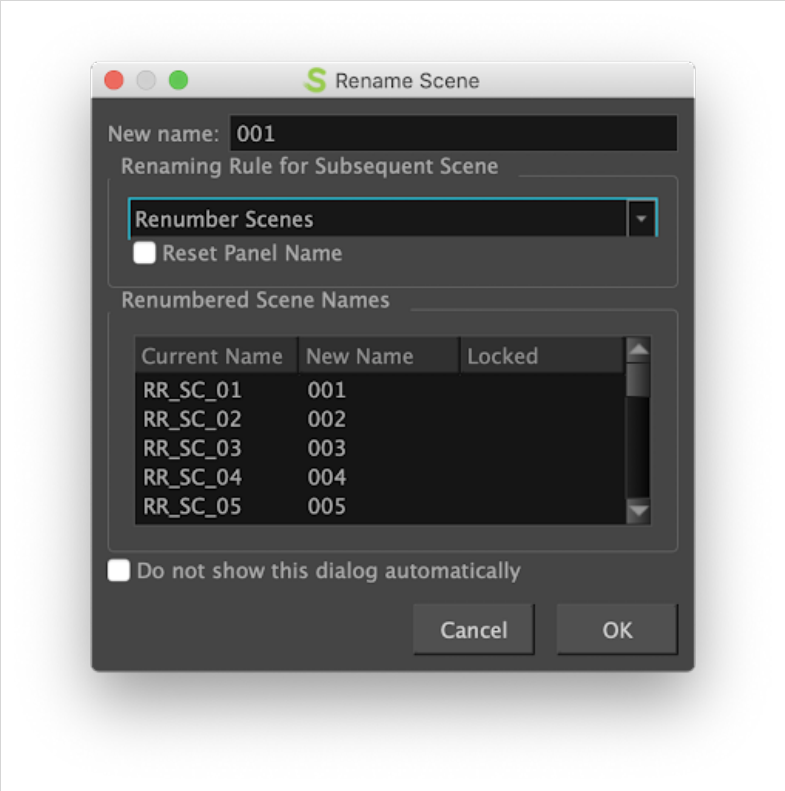
Uploading a Storyboard Pro Scene List

When creating a project in Storyboard Pro, the scene list is already created and an animatic movie preview for each one of these scenes can easily be exported. You can use Producer Link to automatically create scenes in Producer and upload the matching movie preview. This process is very handy if you are working on a project using Storyboard Pro but are not using Harmony Server.

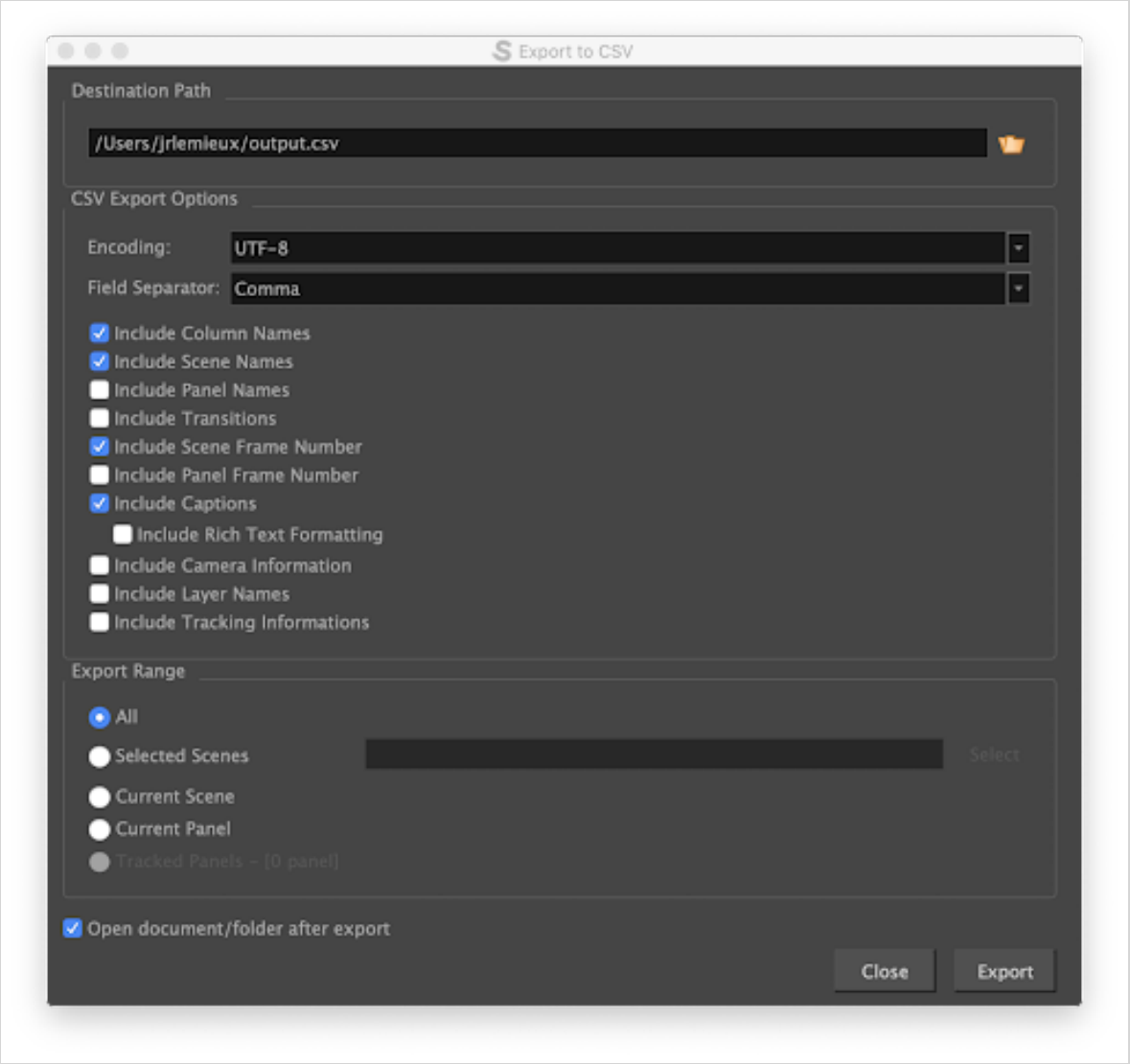
How to export your data from Storyboard Pro

1. In Storyboard Pro, make sure your scenes are named with leading zeros (example: 01, 02, 03 or 001, 002, 003 and not simply 1, 2, 3). You can use the Preferences > Naming Automatically Add leading Zeros and Minimum number of characters as well as the function Storyboard > Rename.

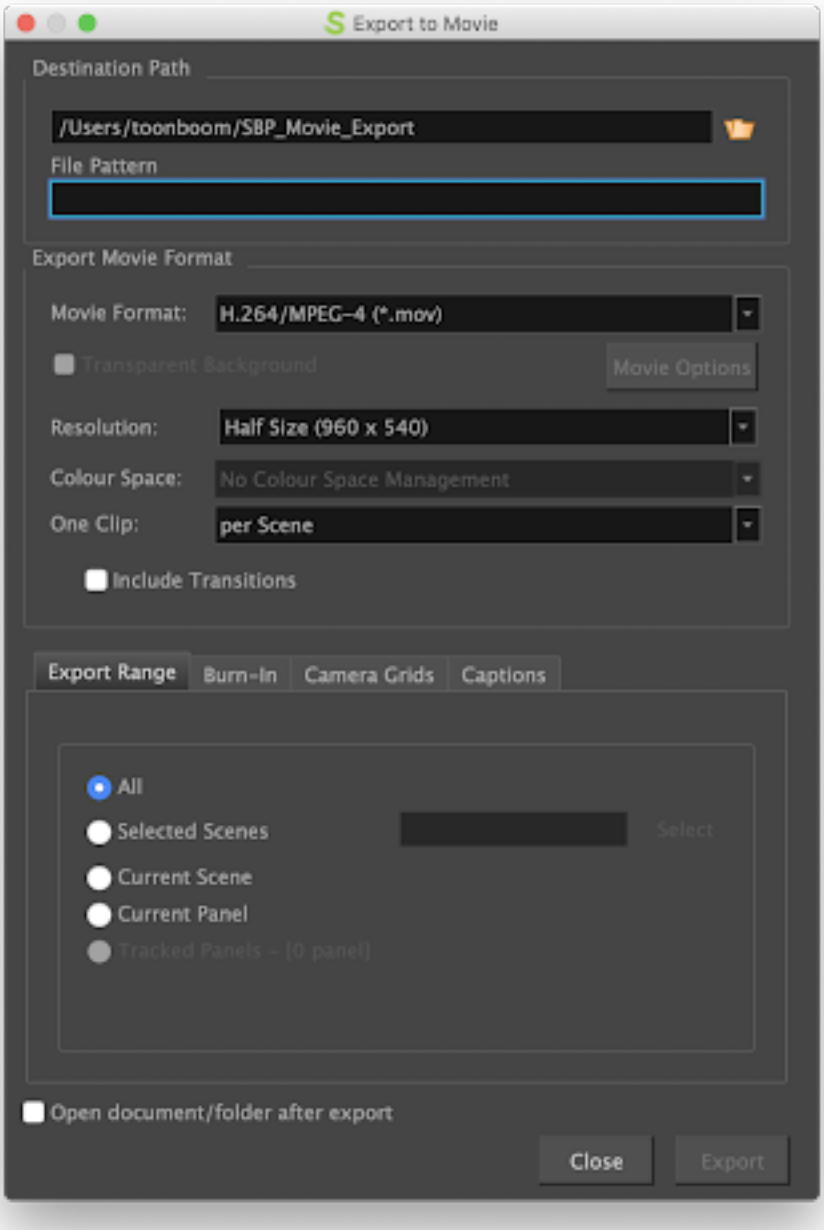




2. Save your SBP Project.
3. From Storyboard Pro, select File > Export > CSV.
4. In the Export to CSV dialog box, in the CSV Export Options section, disable the Include Transitions option.
5. Click Export.



6. From Storyboard Pro, choose File > Export > Movie.
7. Select a Destination Path.
8. Leave the File Pattern field empty.
9. In the One Clip field, select Per Scene.
10. Click Export.

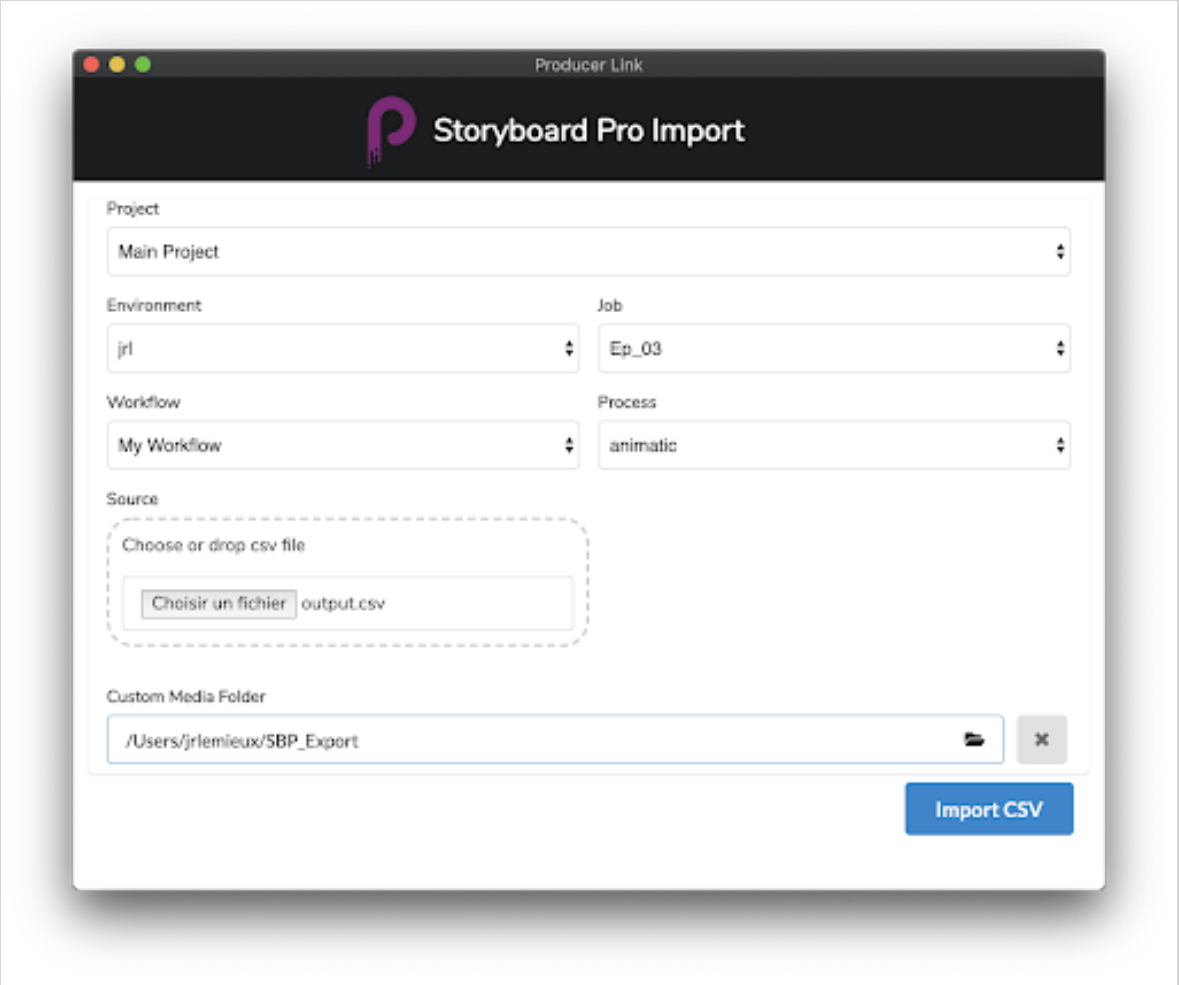


How to import Storyboard Pro data in Producer

1. In Producer Link, select Upload > Storyboard Pro Import.
2. In the Project field, select the Producer project containing the environment you will be creating scenes for.

3. In the Environment field, select the corresponding environment.
4. In the Job field, select the corresponding job (episode, sequence, etc.).
5. In the Scene field, select the scene you are linking an asset to. As you start typing the name, existing scenes will be populated. Note that the scene must already exist in Producer.
6. In the Workflow field, select the scene workflow that will be associated to the scenes.
7. In the Process field, select the Process (task) you are linking your scenes to, most likely Layout or Animatic.

8. In the Customer Media Folder field, browse to the folder containing the rendered movie files.
9. Click Import CSV.



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

Open Offline Scenes

Producer Link's **Open Offline Scene** dialog helps remote users export and manage their offline scenes, and verify that they are up to date with their counterparts on the remote Harmony Database.

NOTE

To be able to access this page, the user is required to check the "Open Scenes in Offline mode" in the Settings page.

When opening a scene from Producer Web Interface's "Open in Harmony" button , Producer Link will take care of comparing any local version with the server version, requesting an export and opening exported scene in Harmony.

It can also be used on its own to open and manage any offline scenes.

NOTE

Some specific usage scenarios are described in Harmony Integration > Working Remotely section.

Command Line Interface

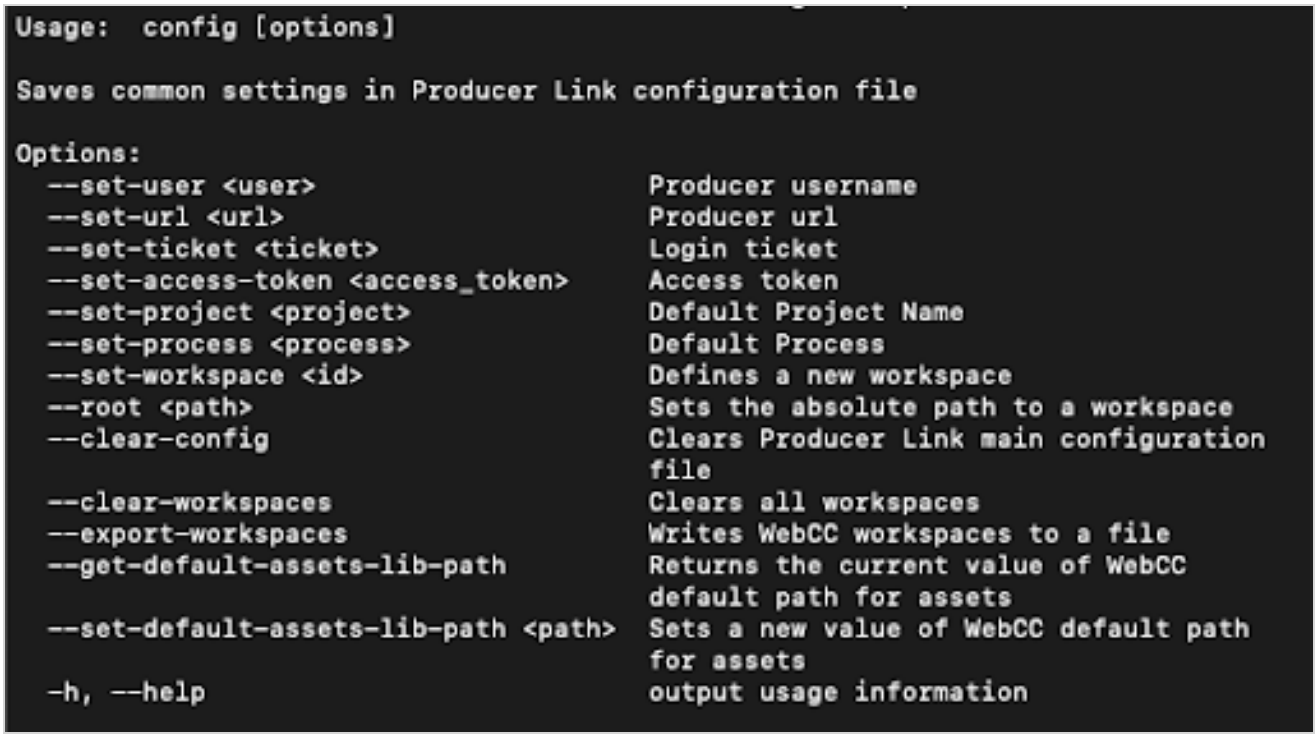
Using a Terminal or a Command Prompt, Producer Link can be modified.

You can navigate to the Producer Link application using the following command:

- macOS cd /Applications/Producer\ Link.app/Contents/MacOS
- Windows: cd “C:\Program Files\Producer Link”

You can access the list of commands using the following command:

- macOS: ./Producer\ Link config --help
- Windows: “Producer Link.exe” config --help"



Use the following command to configure a project for Producer Link:

- Mac OS: ./Producer\ Link config --set-project project_name
- Windows: “Producer Link.exe” config --set-project project_name

Most of the time, the project name will be main_project. If you created a different project (not the environment, but Producer project), use that project name.

How to create a workspace in command line

You can set up your workspaces directly with command lines instead of using the user interface. Use the following command to configure workspaces:

- macOS: ./Producer\ Link config --set-workspace WorkspaceName --root /path/to/my/workspace
- Windows: “Producer Link.exe” config --set-workspace WorkspaceName --root /path/to/my/workspace

How to export workspaces in command line

- Use the following command to export the workspaces as a json file:
    - Mac OS: ./Producer\ Link config --export-workspaces
    - Windows: “Producer Link.exe” config --export-workspaces
- Once the json file is exported, a message is displayed indicating the path where the file has been saved. Browse to that path to find the file.
    - Example: Your WebCC workspaces have been written to /Users/username/workspaces.json
- Copy and paste the workspaces.json file to /USA_DB. The file has to be located on the Harmony Server at the root of USA_DB.