



BBCW Coast Client Portal User Guide

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1. PURPOSE

A DL3 user guide detailing functionality of BBCW's **Client Portal** menu components, including **Asset** inventory querying, **Work Order** management, production management, and report creation.

2. APPLICATION

This user guide supports all BBCW users participating in the management and production of BBCW-related content via Deluxe Media's DL3 digital workflow management system.

3. PROCESS OWNER(S)

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4. Introduction

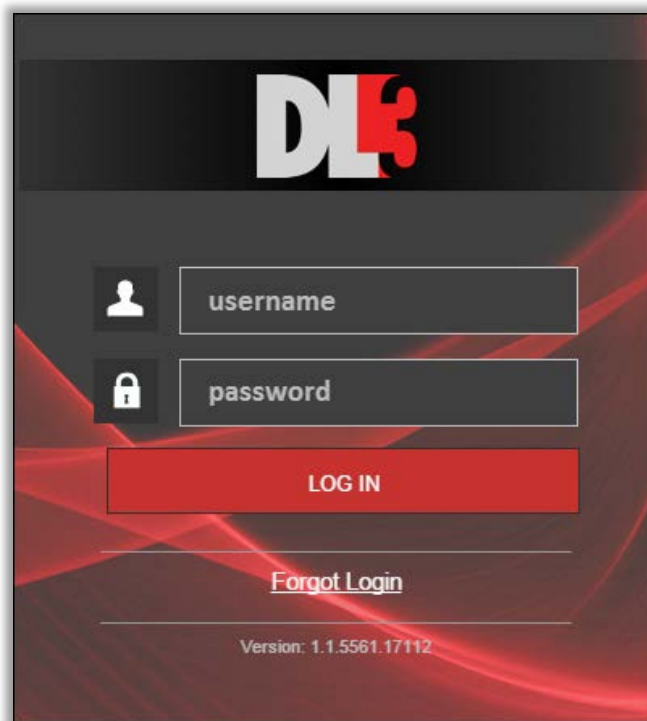
4.1. Tool Description:

BBCW's DL3 **Client Portal** is an interactive, web-based, client-facing production interface. The tool's features include:

- 4.1.1. Customizable inventory search for client **Assets** in DL3
- 4.1.2. **Work Order** creation and editing
- 4.1.3. Compliance scheduling and assignment
- 4.1.4. Monitoring of **Asset** production
- 4.1.5. Reporting for **Assets, Specs, Spec** utilization, auto-**Work Order** creation status, **Work Orders**, and historical EDL keyword searches
- 4.1.6. User profile management

4.2. Client Portal URL

<https://dashboard.deluxe-dl3.com/account/login>



Asset Inventory | Orders | Scheduling | Dashboard | Reports | Profile | Log Out

Time Zone: Pacific Standard Time

5. Asset Inventory

5.1. Usage

As a client, use the **Asset Inventory** panel to search DL3's inventory database for content as associated **Assets**. Searches can employ any of 42 different **Asset** attribute search filters, with many filters offering dozens of additional filtering options to refine searches even further. The default view upon arriving at this page is the **Asset Inventory** search window. Below, selected search terms are defined.

The screenshot shows the 'Asset Inventory' search interface. Red callouts are placed over the following elements:

- 1**: Points to the 'Title Package- No Filter' dropdown menu.
- 2**: Points to the 'Linked to/used in:' section, which includes checkboxes for 'CEA Project' and 'DL3 Job'.
- 3**: Points to the 'Assets with:' section, which includes checkboxes for 'Files Associated', 'Files Pending', and 'Files Removed'.
- 4**: Points to the 'Sibling of:' dropdown menu, which is currently set to '(Asset ID)'.
- 5**: Points to the 'Contains:' section, which includes checkboxes for 'Video', 'Audio', 'Subtitles', 'CC', and 'Graphics'.
- 6**, **7**, and **8**: Point to the 'SEARCH', 'EXPORT', and 'RESET' buttons, respectively.

5.1.1. **Title Package:** A client-specific search filter, **Title Package** is currently not used by BBCW.

5.1.2. Linked To/Used In

5.1.2.1. **CEA Project:** A DVD/Blu-ray-related search filter which will not be used by BBCW.

5.1.2.2. **DL3 Job:** A digital file-based search filter which, because BBCW work is digital file-based *only*, does not need to be used in BBCW searches.

5.1.3. Assets With

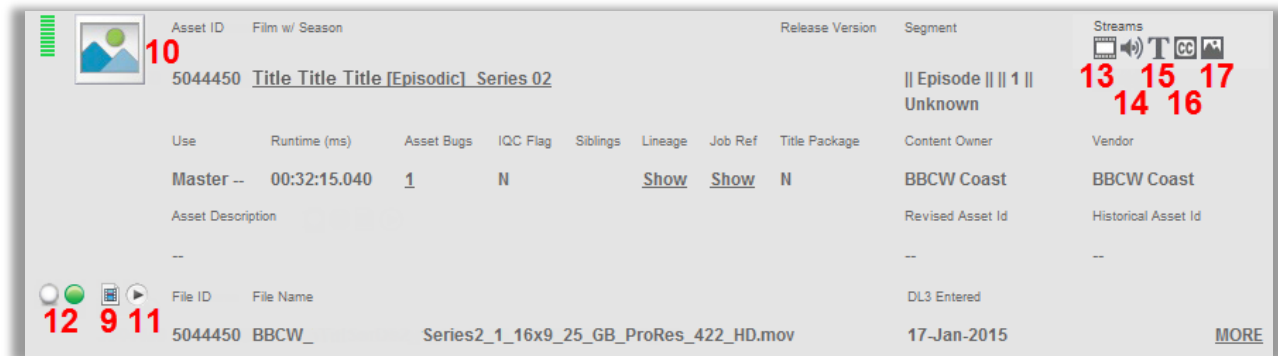
5.1.3.1. **Files Associated:** AKA **Fulfilled Assets**, this will filter to only display files that exist in DL3. The search tool auto-selects this option by default.

5.1.3.2. **Files Pending:** DL3 displays **Asset** "shells" in the inventory which function as placeholders during the stage of the production process in which Deluxe is creating files to fulfill those shells. These shells are also referred to **Unfulfilled Assets**. The search tool auto-selects this option by default.

5.1.3.3. **Files Removed:** If selected, search results will include deleted **Assets**. The search tool *does not* auto-select this search filter by default.

5.1.3.3.1. **Note:** Deleted file data is always retained in the system even if the file no longer exists at Deluxe.

- 5.1.4. **Sibling Of:** Allows users to search for related, time-aligned files synced to one another (termed "**Siblings**"), as long as the **Sibling** relationship was already set previously during production.
- 5.1.5. **Contains (Video, Audio, Subs, CC, Graphics):** Select one or more stream-types to return (in the search results) only **Assets** containing those stream-types. For example, selecting "**Subs**" will return only search results containing subtitles, but not *only* subtitle **Assets**. Video **Assets** containing subtitles will also be returned, but video **Assets** that *do not* contain subtitles *will not* be returned.
- 5.1.6. **Search:** After filters are selected, click the **Search** button to execute the query.
- 5.1.7. **Export:** Click the **Export** button to export a list (formatted in an Excel file) of the top 10,000 **Assets** search results.
- 5.1.8. **Reset:** Click the **Reset** button to return all selected filters to their defaults.



[For illustrative and efficiency purposes, this fictional search result screen shot artificially portrays all icons defined below as part of a single **Asset**.]

- 5.1.9. **Fulfilled File Icon:** Indicates the **Asset Shell** (or record in DL3) and the actual file associated with it, have been linked. Hovering over the icon, a tool appears explaining what the icon is.
- 5.1.10. **Key Art Icon:** Displays a preview of the graphic file. Hovering over the icon, a tool appears explaining what the icon is.
- 5.1.11. **Proxy Playback Icon:** Click to open and view (in Silverlight player) a DRM-encrypted low-resolution proxy of the **Asset**. Hovering over the icon, a tool appears explaining what the icon is.
- 5.1.12. **Pending File Icon:** Shown as a white or green bubble, this icon indicates the file's creation in DL3 is pending, to be created as part of the production process. The color white indicates a production status of **Not Started**, and the color green indicates a production status of **In Progress**. Hovering over the icon, a tool appears explaining what the icon is.
- 5.1.13. **Video Stream Icon:** Indicates the **Asset** contains a video stream.
- 5.1.14. **Audio Stream Icon:** Indicates the **Asset** contains an audio stream.
- 5.1.15. **Subtitle Stream Icon:** Indicates the **Asset** contains a subtitle stream.
- 5.1.16. **Closed Caption Stream Icon:** Indicates the **Asset** contains a closed caption stream.
- 5.1.17. **Graphic Stream Icon:** Indicates the **Asset** contains a graphic stream.
- 5.1.18. **Notes**
- 5.1.18.1. Once search results are returned (see screen shot below), tool tips appear for certain items when the cursor is hovered over them. These are explained later in each section. Additionally, for each search result, other items including **Bugs**, lineage, **Film Names**, a link to reference **Jobs** the **Asset** has been or is associated with, as well as an additional **More** link to show further **Asset** details, have hyperlinks leading to additional **Asset** information.

5.1.18.2. Some search results may be part of a collection of **Assets** grouped together. In this case, a hyperlink called **Expand Group**, used to expand the view to all **Assets** in that group, will appear at the bottom of the **Asset** entry.

The screenshot displays the 'Asset Inventory' interface. At the top, it shows navigation controls: '<< Prev page: 1 of 5 Next >>' and 'Total Items (478)'. Below this is a table with columns: Group#, Firm w/ Season, Release Version, Segment, and Streams. The first entry (Group# 13596) is for 'Hercules - 1983 [Feature]'. Below the main row, there are sub-headers: Use, Source / Mezzanine --, Asset Bugs, IOC Flag, Siblings, Lineage, Job Ref, Title Package, Content Owner, and Revised Asset Id. The 'Expand Group' link is located at the bottom of this entry. The second entry (Asset ID 1626438) is for 'Hercules - 1983 [Feature]'. Below its main row, there are sub-headers: Runtime (ms), Asset Bugs, IOC Flag, Siblings, Lineage, Job Ref, Title Package, Content Owner, Revised Asset Id, DL3 Entered, and Historical Asset Id. The 'MORE' link is located at the bottom right of this entry. Red arrows point from a central 'Hyperlinks' label to the 'Expand Group' link, the 'Show' links, and the 'MORE' link.

Group#	Firm w/ Season	Release Version	Segment	Streams
13596	Hercules - 1983 [Feature]		Feature	
Use				
Source / Mezzanine --	00:01:01.100	2	Y	2
Asset Bugs				
IOC Flag				
Siblings				
Lineage				
Job Ref				
Title Package				
Content Owner				
Revised Asset Id				
Full Linear QC performed on this file://Program Slate, PreBlack, MGM Logo, PostBlack				
-- Expand Group --				
Asset ID	Firm w/ Season	Release Version	Segment	Streams
1626438	Hercules - 1983 [Feature]		Feature	
Use				
Source / Mezzanine --	01:41:50.110	3	Y	10
Asset Bugs				
IOC Flag				
Siblings				
Lineage				
Job Ref				
Title Package				
Content Owner				
Revised Asset Id				
Full Linear QC performed on this file://Program Slate, PreBlack, MGM Logo, PostBlack				
File ID				
File Name				
1626438	zookeeper_mgm_240_1080_23976_prores_eng_Bch_s2826761.mov			DL3 Entered
28-Nov-2011				
MORE				

6. Orders

6.1. Usage

As a client, use the **Orders** panel to access the **Work Order** management tools of the **Client Portal**. Usage features include the following:

- Searching for existing **Work Orders**
- Viewing existing **Work Orders**
- Creating **Work Orders**
- Exporting **Work Orders** reports

6.2. Search for Current Work Orders

The screenshot shows the 'Current Work Orders' search interface. The title 'Current Work Orders' is at the top left, and 'Time Zone: Pacific Standard Time' is at the top right. A search icon with the number 15 is in the top right corner. The form contains the following fields and controls, each with a red numbered callout:

- 1**: Title input field with placeholder 'Enter Title [AUTOFILL]'.
- 2**: Segment dropdown menu.
- 3**: Language dropdown menu.
- 4**: Asset Type dropdown menu.
- 5**: Channel dropdown menu.
- 6**: Created By dropdown menu.
- 7**: Distributor / Territory dropdown menu.
- 8**: Priority dropdown menu.
- 9**: Version dropdown menu.
- 10**: Vendor dropdown menu.
- 11**: Work Order ID input field.
- 12**: Client Ref input field.
- 13**: Contract ID input field.
- 14**: From date field (27/Jul/2015).
- 15**: Search icon.
- 16**: RESET button.
- 17**: SEARCH button.

- 6.2.1. **Title**: Begin typing to filter by series title, or enter “%” and then a word to use this field as a wildcard search. The field will auto-populate a dropdown list of options matching the entered characters. Once the correct **Title** appears, select it.
- 6.2.2. **Segment (Title field must first be populated)**: Select to filter by the desired episode corresponding to the selected **Title** (list will be populated only with **Segments** related to the selection in the **Title** field). Episode display format should include episode name, number, and **House ID**, and is per the content hierarchy provided by BBCW.
- 6.2.3. **Language**: Select to filter by a language (additional languages which may be included in corresponding **Work Orders** will be listed in the search results).
- 6.2.4. **Asset Type**: Select to filter by either audio or subtitle outputs (as may be indicated on the existing **Work Orders** being searched for).
- 6.2.5. **Channel**: Select to filter by a specific broadcast channel.
- 6.2.6. **Created by**: Select to filter by person who created the **Work Order**.
- 6.2.7. **Distributor/Territory**: Select to filter by delivery destination (e.g. playout providers or other end destinations).
- 6.2.8. **Priority**: Select to filter by order status (select standard options only).
- 6.2.9. **Version**: Select to filter by a particular output version (M, O, OE, EE, HO, HE).
- 6.2.10. **Vendor**: Select to filter by a specific 3rd party localization vendor.

- 6.2.11. **Work Order ID:** Select to filter by **Work Order ID**.
- 6.2.12. **Client Ref:** Select to filter by the client's specific reference number.
- 6.2.13. **Contract ID:** Select to filter by **Contract ID**.
- 6.2.14. **From/To:** Select to filter within a certain date range.
- 6.2.15. **Advanced Search Criteria/Toggle Search Criteria:** Click to expand or minimize search criteria pane to either utilize for searching, or to maximize desktop space when looking at search results.
- 6.2.16. **Reset:** Click to clear any applied filters.
- 6.2.17. **Search:** After filters have been applied, click to run the query against associated **Jobs**.

6.3. View Existing Work Orders

1	2	3	4	5	6	7	8	9	10	11	12	13
Order No.	Contract ID	Created By	Created Date	Channels	Distributor	Title	Segment	Client Ref	Comply	Create	Deliver	Notes
1583		Karli BBC	06/Aug/2015		BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 4 - testBBC_EpNameFour		2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV / Hebrew / Subtitles / VSI - Israel / M, CV / Hungarian / Subtitles / Hipeps - Hungary / M, CV / Indonesian / Audio / BTI - Asia / M, CV	
1582	14	Karli BBC	06/Aug/2015		BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree, Episode 4 - testBBC_EpNameFour	00abc1, 2	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV	English (UK) / Video / Deluxe Media / OE, EE, HO, HE, CV
1581		TestBKBH Bethany Harvey_deluxe	04/Aug/2015	BBC Entertainment (Europe)	BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree, Episode 4 - testBBC_EpNameFour	00abc1, 2	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV / Hebrew / Subtitles / VSI - Israel / M, CV / Romanian / Subtitles / BTI - Romania / M, CV	Note 13 Air date is 9 April 2015
1580		Karli BBC	04/Aug/2015		Cloacast TX	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree, Episode 4 - testBBC_EpNameFour	00abc1, 2	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV	English (UK) / Video / Deluxe Media / O, OE, CV
1579		Karli BBC	03/Aug/2015		BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree, Episode 4 - testBBC_EpNameFour	00abc1, 2	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV	English (UK) / Video / Deluxe Media / O, OE, EE, CV
1578		Karli BBC	03/Aug/2015		BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree	00abc1	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV	English (UK) / Video / Deluxe Media / O, CV
1577		Karli BBC	03/Aug/2015		BBC MAM (Sony DBB)	testBBC - 2015 [Episode (60 min)]_Volume 1	Episode 3 - testBBC_EpNameThree	00abc1	2	Yes	English (UK) / EDL / Deluxe Media / M / English (UK) / Video / Deluxe Media / CV	English (UK) / Video / Deluxe Media / O, OE, CV

- 6.3.1. **Order Number:** The identification number assigned to a **Work Order**. Numbers are assigned sequentially as orders are placed. **Work Orders** only contain episodes from a single series.
- 6.3.2. **Contract ID:** The identification number of the contract the Zeus **Work Order** is related to. Contract ID appears next to the WO# line item. Contracts can include **Work Orders** for more than one series, and episodes within a series that are contained in multiple **Work Orders** can also be associated with different contracts (**Contract IDs**).
- 6.3.3. **Created By:** The name and role of the person who created the **Work Order**.
- 6.3.4. **Created Date:** The date the **Work Order** was created.
- 6.3.5. **Channels:** The broadcast channels associated with the **Work Order**.
- 6.3.6. **Distributor:** Delivery destination (e.g. playout provider or other end destination).
- 6.3.7. **Title:** The series title of the content pertaining to the **Work Order**. The title is inclusive of the main title plus series number.
- 6.3.8. **Segment (episodes):** The episode(s) ordered as part of the **Work Order**. Search results display "Episode," episode number, and episode description, where any associated external reference numbers are not seen in this field.
- 6.3.9. **Client Ref:** The client's specific reference number.
- 6.3.10. **Comply (yes/no):** The indicator of whether or not compliance is ordered as part of the **Work Order**.
- 6.3.11. **Create:** The **Production Lines** to be created to fulfill a **Work Order**. "CV" (complied version) is a placeholder for any production lines.

6.3.11.1. **Note:** Some “create” **Production Lines** are created as part of a **Work Order** but are meant for archival purposes only (not for deliver), and thus won’t show up as “deliver” **Production Lines**.

6.3.12. **Deliver:** The **Production Lines** to be delivered to fulfill a **Work Order**. “CV” (complied version) is a placeholder for any production lines.

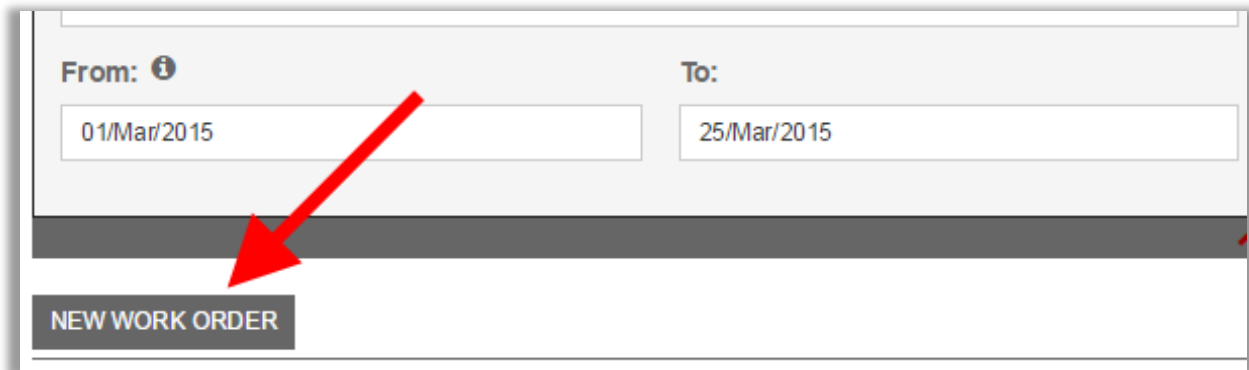
6.3.12.1. **Note:** Some “deliver” **Production Lines** are created as part of a **Work Order** but are ordered as **Pass Through** production lines, meaning the assumption is the **Production Line (Asset)** to be delivered is already created. Thus, they won’t be seen in the **Create** column as “create” **Production Lines**.

6.3.13. **Notes:** Original **Work Order** notes (hover over the icon in column to see details).

6.3.14. **(Work Order No. Hyperlink):** Click the hyperlink access the **Work Order Details** page, containing additional **Work Order** information beyond what is shown in search results.

6.3.14.1. **Note:** Compared to the search results display, external reference numbers are displayed in the **Segments** field of **Work Order Details** page.

6.4. Creating Work Orders: New Work Order (Step 1/Page 1)

A screenshot of a web interface showing a date range selection. The 'From:' field contains '01/Mar/2015' and the 'To:' field contains '25/Mar/2015'. Below these fields is a dark grey bar with a red arrow pointing to a button labeled 'NEW WORK ORDER'.

To create a new **Work Order**, click the **New Work Order** button.

Distributor / Territory *
 BBC MAM (Sony DBB) (Territory: United Kingdom) 1

Title *
 Love Is Not Enough: The Journey To Adoption - [Episodic] 285102 2

Segment *
 Episode 1 - Them And Us 00033243 3

Channel 4
 Contract Id 5
 Source Vendor 6

Segments

Segment Name	Source ID 7	Source Due Date 8	TX Date 9	License Start Date * 10	Delivery Due Date 11
Episode 1 - Them And Us 00033243	Enter Source ID	31/Aug/2015			

Notes
 12

Compliance Required?
 YES NO 13

Priority 14
 Standard

* Required Fields

15 NEXT CANCEL

6.4.1. Distributor/Territory

The end delivery point to which Deluxe will be sending **Assets**.

6.4.1.1. Selection Options

6.4.1.1.1. **Playout**: Selection triggers current compliance and localization **Work Order** options.

6.4.1.1.2. **VOD**: Selection triggers distribution-type **Work Order** options. In the future this will include video on demand platforms, download to own partner, etc., but for now consist of the various global Edit Villages.

6.4.1.2. **Add Distributor/Territory**: Use Zendesk via the DL3 **Client View Portal** to submit a change request to add a new end delivery destination to this drop-down field.

6.4.2. **Title**: Begin typing to select from a pre-populated list of **Titles** matching the entered characters. Upon selection, **Segment** field populates with episode selection options.

6.4.2.1. **Change Request**: For unlisted or incorrectly listed **Titles** (results of incorrect or missing **Titles** against the Zeus content hierarchy data supplied), use Zendesk via the DL3 **Client View Portal** to inform the designated BBCW support team to make a change. Please ensure that such results are vetted in Zeus first, as changes to the content hierarchy will have an impact to other parts of the DL3 as well as messaging with Zeus and TaskMaster.

6.4.3. **Segment**: Select one, multiple, or all available episodes. After **Segment** selection, all further **Work Order** data entered will be applied to **Segments** selected here. Listings include episode names, episode numbers, and **House IDs**.

- 6.4.4. **Channel:** Depending on whether a contract has one or more **Channels** associated with it, click to select a single, multiple, or all available **Channels**.
- 6.4.5. **Contract ID:** Enter the **Contract ID**.
- 6.4.6. **Source Vendor:** If known, enter the name of the company supplying the source material(s), e.g. BBCW for BBCW acquired **Titles**, or All3Media, Fremantle, ITV, etc., for third-party acquired **Titles**.
- 6.4.7. **Source ID:** Not mandatory, but if the source **Asset** is coming from Sony DADC's DBB with a known Asset ID, enter that ID into the **Source ID** field.
- 6.4.8. **Source Due Date:** Not mandatory but required for pipeline planning, but if there is a known **Source Due Date** or an estimated due date, enter that date here.
- 6.4.9. **TX Date:** The earliest live date or scheduled air date for a given program/channel.
- 6.4.10. **License Start Date:** For manually raised **Work Orders**, click the calendar icon to enter that date in DL3, where Deluxe's internal final delivery date will be set by default to the **License Start Date minus 14 calendar days**.
- 6.4.11. **Delivery Due Date:** For non-default (or for specific) due date requests, click to select an alternate due date.
- 6.4.11.1. **Note:** This field is not required, but a selection in either **License Start Date** or **Delivery Due Date** is required to successfully add a **Work Order**.
- 6.4.11.2. **Note:** Once the **Segments/Episodes** have been selected, they will populate into the **Segment** list beneath the **Channel**, **Contract ID**, and **Source Vendor** fields. In this section, the user will be able to enter **Source ID** and **Source Due Date** information per episode.
- 6.4.12. **Notes:** Supply any additional pertinent **Work Order** information for which there is not a dedicated interface field by entering it here.
- 6.4.13. **Compliance Required?:** Select "Yes" if compliance is *required*. Select "No" if compliance is *complete* but localization needs to be ordered, or if ordering video only output.
- 6.4.14. **Priority:** Select which priority status applies to the **Work Order** (select standard options only).
- 6.4.15. **Next:** Click to proceed to and add localization requirements.

6.5. Creating Work Orders: New Work Order (Step 2/Page 2)

Distributor/Territory
BBC MAM (Sony DBB) (Territory: United Kingdom)

Title
Love Is Not Enough: Life After Adoption - [Episodic] 281160

Segments

Segment - House ID	Source ID	Source Due Date	TX Date	License Start Date	Delivery Due Date
Episode 1 - Mark And Sarah's Family 00041627		31/Aug/2015	24/Sep/2015	16/Sep/2015	1 02/Sep/2015

Channels
> BBC Entertainment (Europe)

Contract Id

Source Vendor

Notes
2

Compliance Required?
No 7

Priority
Standard

Assets For Delivery	Language	Vendor	Version	Pass Through	Action
No Items found					

6 ADD

<< PREVIOUS SAVE CANCEL

3 4 5

6.5.1. **Delivery Due Date (continued access from page 1):** For non-default (or for specific) due date requests, click to select an alternate due date.

6.5.1.1. **Note:** This field is not mandatory, but a selection in either **License Start Date** or **Delivery Due Date** is required to successfully add a **Work Order**.

6.5.2. **Notes:** Supply any additional pertinent **Work Order** information, for which there is not a dedicated interface field, by entering it here.

6.5.3. **Previous:** Click to return to **New Work Order Step 1/Page 1**.

6.5.4. **Save:** Click to submit **Work Order**.

6.5.5. **Cancel:** Click to cancel submission of **Work Order**.

6.5.6. **Add:** Click to add a new line item for localization requirements (see section **Creating Work Orders: New Work Order (Step 2/Page 2): Add (New Line Item)** below).

6.5.7. **(Language Tool Icon):** Click to open a list of languages to be added to the **Work Order** as localization requirements (see section **Creating Work Orders: New Work Order (Step 2/Page 2): Language Tool Icon** below).

6.6. Creating Work Orders: New Work Order (Step 2/Page 2): Add (New Line Item)

Assets For Delivery	Language	Vendor	Version	Pass Through	Action
Audio	Select Language	Select Vendor	Select Version	<input type="checkbox"/>	
1	2	3	4	5	6
					ADD

- 6.6.1. **(Select Asset) Type:** Select the **Asset** type of the output.
- 6.6.1.1. **Audio:** The **Asset** output type will be an audio file.
- 6.6.1.2. **Mux:(Transcode):** This is only available if compliance is not required. This is used to order S&D or VOD transcodes. This can also be used for a MediaStore transcode.
- 6.6.1.3. **Video:** This is only available if compliance is not required. This is used to indicate a video **Pass Through** or Deluxe edit for playout.
- 6.6.1.4. **Sub:** The **Asset** output type will be a subtitle file.
- 6.6.2. **Select Language:** Select output language.
- 6.6.3. **Vendor:** If an alternate to the default **Vendor** is required, click and select from a list of BBCW approved **Vendors**.
- 6.6.3.1. **Change Request:** If a **Vendor** needs added to this list, use Zendesk via the DL3 **Client View Portal** to inform the designated BBCW support team to request that change.
- 6.6.4. **Version:** Click and select which edit version(s) should be created for each language.
- 6.6.4.1. **Compliance Required:** Default edit version will be "M," and the remaining data will be collected post-compliance.
- 6.6.4.2. **Compliance Not Required:** Click to select edit version(s) to be localized in order to complete the **Work Order** entry.
- 6.6.5. **Pass Through:** If an **Asset** already exists and needs to be delivered to another location (Edit Village or additional playout), click **Pass Through** to indicate delivery only of the selected line item.
- 6.6.6. **Action:** Click to remove line item from **Work Order**.

6.7. Creating Work Orders: New Work Order (Step 2/Page 2): Language Tool Icon

enjoy | Orders | Scheduling | Dashboard | Reports | Profile | Log Out

Languages 6 x

<input type="checkbox"/> Chinese (Mandarin - Traditional)	<input type="checkbox"/> Hebrew	<input type="checkbox"/> Portuguese (Brazil)
<input type="checkbox"/> Danish	<input type="checkbox"/> Hungarian	<input type="checkbox"/> Romanian
<input type="checkbox"/> Dutch	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Slovenian
<input type="checkbox"/> English (UK)	<input type="checkbox"/> Italian	<input type="checkbox"/> Spanish (Latin America)
<input type="checkbox"/> English (USA)	<input type="checkbox"/> Korean	<input type="checkbox"/> Swedish
<input type="checkbox"/> Finnish	<input type="checkbox"/> Norwegian	<input type="checkbox"/> Thai
<input type="checkbox"/> Flemish	<input type="checkbox"/> Polish	<input type="checkbox"/> Turkish

SELECT ALL 3
 SAVED AS PREFERRED LIST 4
5

Compliance Required? No Priority Standard

Language	Type	Vendor	Version	Pass Through	Action
No Items found					

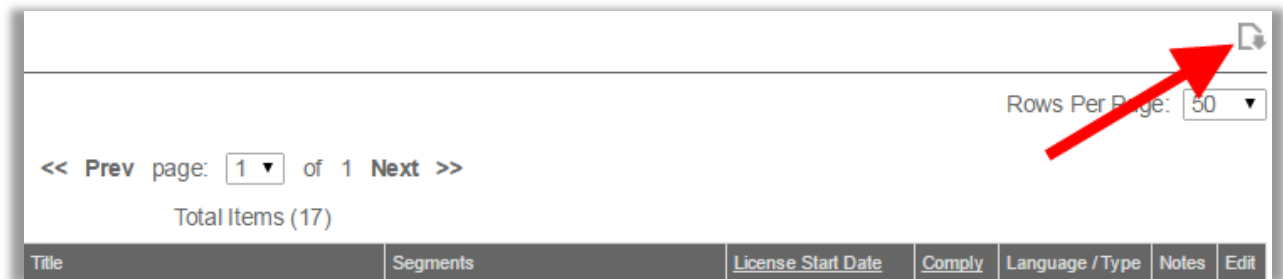
- 6.7.1. **Language Select:** After clicking on the **Language Tool Icon** to access this window (see arrow in screen shot above), select one or more languages from the list to add to the **Work Order**.
- 6.7.2. **Select All:** Place a check in the checkbox to select all languages.
- 6.7.3. **Save as Preferred List:** Select a specific set of languages, then place a check in this checkbox to use that defined list for future **Work Order** creation.
- 6.7.4. **Save:** Click to add selected items to the **Work Order**. The **Languages** window closes and the user is returned to the Step 2/Page 2 of the **Work Order** creation process.
- 6.7.5. **Cancel:** Click to cancel any selections in this window and close the window.
- 6.7.6. **Close:** Click to close the window, and return to the Step 2/Page 2 of the **Work Order** creation process.
- 6.7.7. Steps 6.6.2 through 6.6.6 above are used to complete the information entering process.

6.8. New Work Order Request Submission

- 6.8.1. **Save:** Per section 6.5.4 above (back on Step 2/Page 2 of the **Work Order** creation process), click the **Save** button to submit the new **Work Order** request to Deluxe. The user is then returned to the **Current Work Orders** page.
- 6.8.2. **Note:** Upon submission, an automatic email is sent to the Deluxe Account Management team to orchestrate for processing, **Jobs** are created in the backend and, once reviewed and approved, are populated onto the **Production Dashboard** for statusing, where new **Work Orders** can be viewed.

6.9. Export Work Order Reports

Searches run on the **Current Work Orders** panel can be exported as a report format to Excel. The document will contain all **Work Order** fields.



- 6.9.1. **Export:** Click the **Export** icon at the top right of the search results.

7. Scheduling

7.1. Usage

As a client, use the **Scheduling** panel to access the scheduling management tools of the **Client Portal**. Usage features include the following:

- Searching for compliance **Job(s) / Milestone(s)**
- Viewing compliance **Job(s)/Milestone(s)** search results
- Assigning compliance **Job(s) / Milestone(s)**
- Entering version data
- Exporting scheduling reports

7.2. Search for Jobs/Milestones

The screenshot shows the 'Compliance Scheduling' search interface. It features a grid of search filters with the following callouts:

- 1**: Film Name input field.
- 2**: Segments input field.
- 3**: Languages dropdown menu.
- 4**: Release Versions dropdown menu.
- 5**: Milestones dropdown menu.
- 6**: Milestone Status dropdown menu.
- 7**: Milestone Assignee dropdown menu.
- 8**: From date input field.
- 9**: Priority dropdown menu.
- 10**: Work Order ID input field.
- 11**: Job ID input field.
- 12**: House ID input field.
- 13**: RESET button.
- 14**: SEARCH button.
- 15**: Search icon (magnifying glass) in the top right corner.

7.2.1. **Film Name:** Begin typing to select from a pre-populated list of **Film Names** matching the entered characters. Upon selection, **Segment** field populates with episode selection options.

7.2.1.1. **Change Request:** For unlisted or incorrectly listed **Titles** (results of incorrect or missing **Titles** in the content hierarchy data supplied), use Zendesk via the DL3 **Client View Portal** to inform the BBCW support team to request a change.

7.2.2. **Segments:** (**Film Name** field must first be populated): Select to filter by the desired episode corresponding to the selected **Title** (list will be populated only with **Segments** related to the selection in the **Title** field). Episode display format includes episode name, number, and **House ID**.

7.2.3. **Language:** Select to filter by a language in the event that the OLM (original language master) is not English, and thus requires a specific viewer or producer native to that language.

7.2.3.1. **Change Request:** The options in this dropdown are populated based on a list provided by BBCW. If any additions need to be made, please use Zendesk via the DL3 **Client View Portal** to submit a change request.

7.2.4. **Release Versions:** Click to select **Release Versions** by which to filter search results.

7.2.5. **Milestones:** Click to filter search results by either compliance viewing or compliance approving **Milestones**.

7.2.6. **Milestone Status:** Click to filter search results by the **Assignment** or production status of a **Milestone**.

7.2.7. **Milestone Assignee:** Click to filter search results by the person the work has been assigned to.

7.2.8. **From/To:** Select to filter within a certain date range.

7.2.9. **Priority:** Click to filter by a production priority level.

7.2.9.1. **High:** Suggested use is a "rush" order. This is visually indicated by a red up arrow.

7.2.9.2. **Normal:** Suggested use is a "standard" order. This is visually indicated by a green colored status indicator icon.

7.2.9.3. **Low:** Suggested use is something with known "wobble room" in the scheduling. This is visually indicated by a green down arrow.

7.2.10. **Work Order ID:** Enter number to filter by **Work Order ID**.

7.2.11. **Job I.D.:** Enter number to filter by **Job I.D.**

7.2.11.1. **Job I.D. Description:** The **Job ID** is an internal DL3 reference to the compliance **Job** and associated **Milestones**. The **Job ID** will be displayed in the results portion of the compliance schedule as well as on the **Assignments** page of the **Compliance Editor** tool. As a unique identifier to a specific set of **Milestones** for a given episode of content, it can be used as a more efficient searching method in place of using content hierarchy.

7.2.12. **House I.D.:** Enter number to search by **House ID** rather than **Title (Film Name)** or episode (**Segment**) name.

7.2.13. **Reset:** Click to clear any applied filters.

7.2.14. **Search:** After filters have been applied, click to run the query against associated **Jobs**.

7.2.15. **Advanced Search Criteria/Toggle Search Pane:** Click to expand or minimize search criteria pane to either utilize for searches or to maximize desktop space when looking at search results.

7.3. View Compliance Job(s) / Milestones Search Results (three sections: Status, Priority, and Search Results)

Status							Priority							
Total Jobs	Completed	In Progress	Confirmed	Assigned	Unassigned	Declined	Total Performance	Normal						
138	40	8	5	23	58	4	138	138						
1	2	3	4	5	6	7	8	9						
Rows Per Page: 50														
<< Prev page: 1 of 3 Next >>														
10	11	12	13	14	15	16	Total Items (138)	17	18	19	20	21	22	23
Priority & Milestone Due Date	EDL Approval	Start Time	Completed Time	Work Order ID	Job ID	Film Name - Segment Name	House ID	Edit Route Info / Client Presence Req	Workability / Milestone Name	Milestone Status	Assignee User	Runtime	Notes	
30-Mar-2015	EDL Approved	24-Mar-2015	24-Mar-2015	945	6745	testBBC - 2015 [Episodic (60 min)]_Volume 1 3 testBBC_EpNameThree 1	1	Craft-Edit (No)	Compliance Viewing	Completed	Bethany Harvey_deluxe		Open	
30-Mar-2015	EDL Approved	24-Mar-2015	24-Mar-2015	945	6745	testBBC - 2015 [Episodic (60 min)]_Volume 1 3 testBBC_EpNameThree 1	1	Craft-Edit (No)	Compliance Approval	Completed	Bethany Harvey_deluxe		Open	
20-Mar-2015	Pending			920	6716	testBBC - 2015 [Episodic (60 min)]_Volume 1 3 testBBC_EpNameThree 1	1	Pending (No)	Compliance Viewing	Confirmed	BBC_SNL		Open	
20-Mar-2015	Pending			920	6716	testBBC - 2015 [Episodic (60 min)]_Volume 1 3 testBBC_EpNameThree 1	1	Pending (No)	Compliance Approval	Confirmed	BBC_SNL		Open	
27-Mar-2015	Pending			781	6561	testBBC - 2015 [Episodic (60 min)]_Volume 1 4 testBBC_EpNameFour 2	2	Pending (No)	Compliance Viewing	Unassigned	Select User		Open	
27-Mar-2015	Pending			781	6561	testBBC - 2015 [Episodic (60 min)]_Volume 1 4 testBBC_EpNameFour 2	2	Pending (No)	Compliance Approval	Unassigned	Select User		Open	

Section 1: (Job) Status

Values with no **Job** association will not display, (for example, **Failed** status is not seen above.) Click numerical values to further filter search results to only include *that* selected status.

7.3.1. **Total Jobs:** The total number of search results (**Jobs**) returned that comply with the selected filters.

7.3.2. **Completed:** The total number of **Jobs** contained in the search results where the work has been completed.

- 7.3.3. **In Progress:** The total number of **Jobs** contained in the search results where the work is in progress.
- 7.3.4. **Confirmed:** The total number of **Jobs** contained in the search results where the work has been assigned to a user and has been accepted via the **Compliance Editor Tool**.
- 7.3.5. **Assigned:** The total number of **Jobs** contained in the search results where the work has been assigned a user.
- 7.3.6. **Unassigned:** The total number of **Jobs** contained in the search results where the work has *not* been assigned a user.
- 7.3.7. **Declined:** The total number of **Jobs** contained in the search results where the work has been assigned to a user and has been declined via the **Compliance Editor Tool**.



Section 2: (Job) Priority (values with no **Job** association will not display, for example, **High** and **Low** priority values are not visible above)

- 7.3.8. **Total Performance:** The total number of **Jobs** contained in the search results assigned priority values.
- 7.3.9. **High, Normal, Low:** See definitions in section 7.2.9 above.

Section 3: Search Results

- 7.3.10. **Priority & Milestone Due Date:** The priority value (High, Normal, Low) assigned to the **Milestone**, and the date work on the **Milestone** must be completed.

- 7.3.10.1. **Note:** Hover cursor over the colored priority bubble to verify the **Job's** priority value.

Priority & Milestone Due Date	EDL Approval	Start Time	Complete
 Priority - Normal	Approved	24-Mar-2015	24-Mar-
 30-Mar-2015	EDL	24-Mar-	24-Mar-

- 7.3.11. **EDL Approval:** Indicates whether or not the edit decision list (EDL) has been approved for compliance work to proceed.
- 7.3.12. **Start Time:** A date stamp indicating the date that work on the **Job** commenced.
- 7.3.13. **Completed Time:** A date stamp indicating what date work on the **Job** was completed.
- 7.3.14. **Work Order ID:** The identification number assigned to a **Work Order**. Numbers are assigned sequentially as orders are placed. **Work Orders** only contain episodes from a single series.
- 7.3.15. **Job ID:** An internal DL3 reference to the compliance **Job** and associated **Milestones**. The **Job ID** will be displayed in the results portion of the compliance schedule, as well as in the **Assignments** page of the **Compliance Editor** tool. As a unique identifier to a specific set of **Milestones** for a given episode of content, it can be used as a more efficient searching method in place of using content hierarchy.
- 7.3.16. **Film Name – Segment Name:** A display of the content hierarchy associated to the **Job**, including **Title**, series, episode name, and episode number.
- 7.3.17. **House I.D:** Displays the **House ID** for a given episode.
- 7.3.18. **Edit Route Info / Client Presence Req(uested):** An indicator of whether or not the work will be auto-rendered or require a **Craft Edit**, as well as whether or not the presence of the client at the editing session was requested.

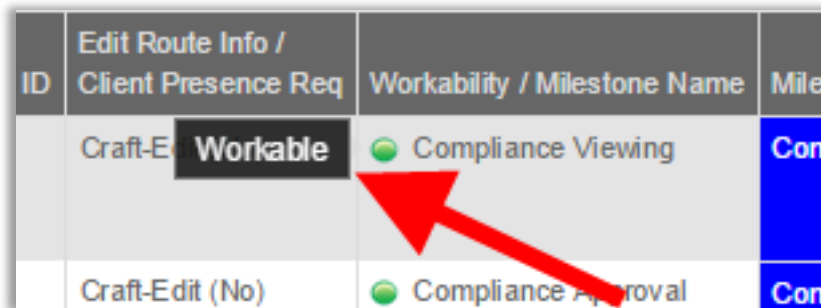
7.3.19. **Workability / Milestone Name:** The current **Workability Status** of the **Job**, and the type of **Milestone** the **Job** has reached.

7.3.19.1. **Note: Milestones Defined**

7.3.19.1.1. **Compliance Viewing:** A **Milestone** type encompassing the creation of compliance logs, entering of version data, and indicating auto-render or craft edit preferences.

7.3.19.1.2. **Compliance Approval:** A **Milestone** type encompassing the approval of compliance logs and subsequent files created from those logs.

7.3.19.2. **Note:** Hover cursor over the colored workability bubble to verify the **Job's Workability Status**.



ID	Edit Route Info / Client Presence Req	Workability / Milestone Name	Mile:
Craft-E	Workable	● Compliance Viewing	Com
Craft-Edit (No)		● Compliance Approval	Com

7.3.20. **Milestone Status:** The status of a **Milestone** as it pertains to production and **Assignments**.

Possible statuses are **Unassigned**, **Assigned**, **In Progress**, **Complete**, and **Failed**.

7.3.21. **Assignee User:** If a **Milestone** is unassigned, this field will display "Select User." If a **Milestone** is assigned, the user's name will appear in this field. This field is a hyperlink that opens the **Resource** list of named individuals allowing a user to be assigned to an unassigned **Milestone** or a new user to take over the **Assignment** of a previously assigned **Milestone**. See section **Assigning Compliance Job(s) / Milestone(s)** below for more details.

7.3.22. **Runtime:** **Runtime** is stored at the **Asset** level rather than within the **Content Hierarchy** (which is at **Title**/episode level). If no runtime is listed, a source (a master **Asset**) has not been linked to the **Job**, and the runtime is not available to be pulled into the field. If a source *has been linked*, this field will populate with the end-to-end **Runtime** of the source file.

7.3.23. **Notes:** The **Notes** field is a hyperlink that opens the **Compliance Notes** window. This window is used to enter the version data for a compliance **Job**. Entering version data is discussed further in section **Entering Version Data** below.

7.4. Assigning Compliance Job(s) / Milestone(s)

Once the **Job / Milestone** to be assigned appears in the results view either by default or as the result of a search, it can be assigned to a given user. **Assignments** are completed at **Milestone** level and each compliance **Job** will have two **Milestones**.

7.4.1. Notes

7.4.1.1. **Compliance Viewing:** A **Milestone** type encompassing the creation of compliance logs, entering the version data, and indicating auto-render or craft edit preferences.

7.4.1.2. **Compliance Approval:** A **Milestone** type encompassing the approval of compliance logs and the subsequent files created from those logs.

7.4.1.3. "Milestone not Assigned" Interface display:

7.4.1.3.1. **Milestone Status** column shows Unassigned.

7.4.1.3.2. **Assignee User** column shows Select User hyperlink.

7.4.1.4. "Milestone Status is Assigned but Not Started" Interface Display:

7.4.1.4.1. **Milestone Status** column shows Assigned.

7.4.1.4.2. **Assignee User** column shows Assigned User Name hyperlink.

7.4.2. Assign a Milestone

7.4.2.1. Click on Select User in the **Assignee User** column.

7.4.2.2. In the **Resource List** window, search for and/or select user from list, and then

7.4.2.3. Click the **Assign User** button.

7.4.2.3.1. **Note:** Assigned users can also be unassigned using the **Unassign User** button, after having clicked on the assigned user's name in the **Assignee User** column.



7.4.3. Additional Notes:


7.4.3.1. The **Job** will now also appear in the **Compliance Scheduling Tool** for acceptance and processing.

7.4.3.2. If a **Milestone** is assigned to a user, their name is a hyperlink that will open the **Resource List**. From here a new user can re-assign the **Milestone** to themselves. This will remove the **Job/Milestone** from the **Compliance Editor Tool Assignments** of the *original* user, and add it to the **Compliance Editor Tool Assignments** of the *new* user. The compliance scheduling results will also update to note this change to the new user. This system feature is in place to allow users the flexibility to reassign work in the event of, for example, sickness absences, and therefore needs to be used in conjunction with the customer's own best practices and procedures.

7.5. Entering Version Data

Within the results view, each **Milestone** line contains its own **Notes** column with a hyperlink to open the **Compliance Notes** window.

Workability / Milestone Name	Milestone Status	Assignee User	Runtime	Notes
 Compliance Viewing	Completed	Bethany Harvey_deluxe		<u>Open</u>
 Compliance Approval	Completed	Bethany		<u>Open</u>



7.5.1. Compliance Notes Windows

Since each **Compliance Job** contains two **Milestones**, this page is shared across both **Milestones**.

Updating the version data in one **Milestone** will also update in the second **Milestone** of the same **Job**.

From here, using typical interface functionality explained previously, the user can update content level data as well as version data. These fields can be reset by clicking the **Reset** button. Changes are made by

clicking the **Save** button. When version data is being entered, click **Save** to add these lines to this **Compliance Notes** window.

7.5.1.1. **Note:** This information will export as part of the compliance PDF created post-compliance.

Compliance Notes ✕

testBBC - 2015 [Episodic (60 min)]_Volume 1 - (Work Order 781)

General Observations (2000 Characters Max)

Description (2000 Characters Max)

Cast (2000 Characters Max)

This section is optional. However, all must be selected if one is.

Version	Territory	Schedule	Rating	Warning
Version ▾	Select Territories ▾	Schedule ▾	Rating ▾	Warning ▾

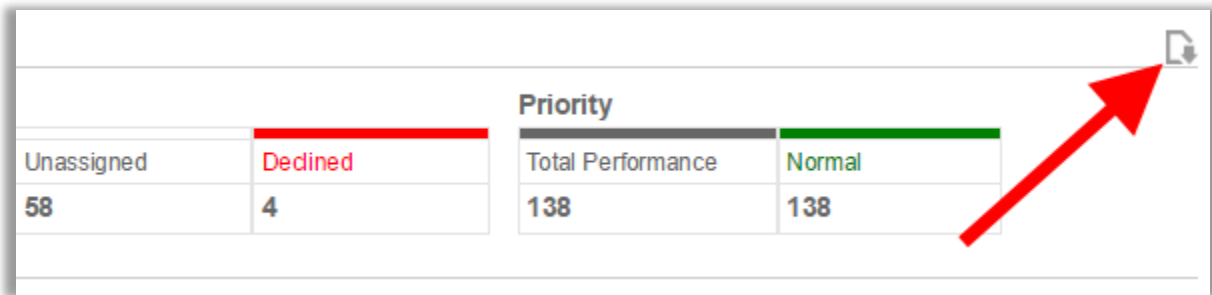
RESET
SAVE

Version Information

Version	Territory	Schedule	Rating	Warning	Job	Edit	Delete
O	Benelux	SAT	-	-	Created: 20/Mar/2015 by David Neece	✎	✖
	Italy	Never	-	-	Modified: 20/Mar/2015 by David Neece Created: 20/Mar/2015 by David Neece	✎	✖
	Latin America	NAK	-	-	Created: 20/Mar/2015 by David Neece	✎	✖
Version	Territory	Schedule	Rating	Warning	Job	Edit	Delete
HO	Scandinavia	Never	U	30 U: Universal – suitable for all ages.	Created: 20/Mar/2015 by David Neece	✎	✖
	Italy, Poland	PW	A	22 A: This programme shows close up graphic scenes of medical procedures and is suitable for adults only.	Created: 20/Mar/2015 by David Neece	✎	✖
Version	Territory	Schedule	Rating	Warning	Job	Edit	Delete
HE	South Africa	After 18:00 (only playable 18:00 – 05:00)	-	-	Created: 20/Mar/2015 by	✎	✖

7.6. Export Scheduling Reports

Searches run on the **Scheduling** panel can be exported in report format to Excel. The document will contain all **Scheduling** fields as displayed in the compliance schedule results view.



The screenshot shows a table with search results. The table has two main sections. The first section has two columns: 'Unassigned' with a value of 58, and 'Declined' with a value of 4. The second section is titled 'Priority' and has two columns: 'Total Performance' with a value of 138, and 'Normal' with a value of 138. A red arrow points to an export icon (a document with a downward arrow) located in the top right corner of the table area.

Unassigned	Declined	Total Performance	Normal
58	4	138	138

7.6.1. **Export:** Click the **Export** icon at the top right of the search results.

8. Production Dashboard

8.1. Usage

As a client, use the **Dashboard** panel to access the production monitoring tools of the **Client Portal**. Usage features include the following:

- Search of **Asset** production within the production environment
- Refine search results by **Asset** type
- Viewing file production attributes within search results
- Exporting **Dashboard** reports

8.2. Search for Asset Production with the Production Environment

The screenshot shows a 'Production' search interface with the following numbered callouts:

- 1**: Title search field
- 2**: Segments search field
- 3**: Languages dropdown
- 4**: Work Order ID search field
- 5**: Channel dropdown
- 6**: Date Type dropdown
- 7**: Release Versions dropdown
- 8**: Contract ID search field
- 9**: Priority dropdown
- 10**: Date From field
- 11**: Production Status dropdown
- 12**: Encode Status dropdown
- 13**: Tech Status dropdown
- 14**: QC Status dropdown
- 15**: RESET button
- 16**: SEARCH button
- 17**: Search icon in the top right corner

8.2.1. **Title:** Begin typing to filter by series title. The field will auto-populate a dropdown list of options matching the entered characters. Once the correct **Title** appears, select it.

8.2.1.1. **Change Request:** For unlisted or incorrectly listed **Titles** (results of incorrect or missing titles in the content hierarchy data supplied), use Zendesk via the DL3 **Client View Portal** to inform the BBCW support team to request a change.

8.2.2. **Segment:** (**Title** field must first be populated): Select to filter by the desired episode corresponding to the selected **Title** (list will be populated only with **Segments** related to the selection in the **Title** field). Episode display format includes episode name, number, and **House ID**.

8.2.3. **Languages:** Select to filter by a language. The dropdown will populate a list of all languages associated to the client. These can be selected individually or by using the **Select All** option.

8.2.4. **Work Order I.D.:** The identification number generated by DL3 for every **Work Order** placed from within the UI or via automated data transfer. This **Work Order ID** is held at series/contract level.

8.2.4.1. **Note:** One **Work Order** may have many associated results returned depending on how the order was placed, and what other filters are activated.

8.2.5. **Channel:** Select to filter by a specific broadcast channel.

8.2.6. **Date Type:** Any of a variety of production related dates assigned to the **Asset**.

- 8.2.7. **Release Versions:** Any of a variety of output versions of the original content. The dropdown will populate a list of all versions associated to the client. These can be selected individually or by using the **Select All** option.
- 8.2.8. **Contract I.D.:** The identification number of the contract the **Work Order** is associated with. Contracts can include **Work Orders** for more than one series, and episodes within a series that are contained in multiple **Work Orders** can also be associated with different contracts (**Contract IDs**).
- 8.2.9. **Priority:** Select to filter by order status (select standard options only).
- 8.2.10. **Date From/To:** Select to filter within a certain date range.
- 8.2.11. **Production Status:** Select to filter by overall **Production Status**.
- 8.2.12. **Encode Status:** Select to filter by **Encode Status**.
- 8.2.13. **Tech Status:** Select to filter by **Tech Status**.
- 8.2.14. **QC Status:** Select to filter by **QC Status**.
- 8.2.15. **Reset:** Click to clear any applied filters.
- 8.2.16. **Search:** After filters have been applied, click to run the query against associated **Jobs**.
- 8.2.17. **Advanced Search Criteria/Toggle Search Pane:** Click to expand or minimize search criteria pane area to either utilize for searches or to maximize desktop space when looking at search results.

8.3. Refine Search Results by File Type

Click the numbers below the **Compliance**, **Video**, **Subtitles**, or **Audio Asset** type headers to filter search results, based on search criteria selected in the search area fields, and by that **Asset** type. Search result attributes vary depending on the selected **Asset** type.

318 Total Compliance Items				
Status				
Total Files	Compliance 1	Video 2	Subtitles 3	Audio 4
712	318	365	6	23

- 8.3.1. **Compliance** – This will display compliance EDLs, their workability status, and their production status.
- 8.3.2. **Video** – This will display all video files to be created; inclusive of proxies, and complied version masters. This will show workability and production statuses.
- 8.3.3. **Audio** – This will display the audio deliverables, their workability status, and their production status.
- 8.3.4. **Subtitles** - This will display the subtitle deliverables, their workability status, and their production status.

8.4. View Asset Production Attributes within Search Results

Based on the selected search filters, view **Asset** production attributes.

- 8.4.1. **Note:** The numerical value in the **Asset No.** column represents the I.D. assigned to the file created inside DL3.

Compliance

Production Status	Work Order ID	Contract ID	Version	Film	Episode - House ID	Channel	Asset No.	Intended Use	Encode Status	Workable Due	Why Not Workable?	Tech Status	QC Status	EDL Approval	Distributor (Vendor)	Deliver Due Date
Not Workable	1024		M	Kate's Test Film - 2015 [Episodic (60 min)]_Season 01	Episode 01 - EpisodeOne Kate123-01		8112000	Non-source / Deliverable	Not Required	21-Apr-2015	Researching Asset	Not Required	Not Required	EDL Approved	BBC MAM (Sony DBB)	17-Apr-2015
Not Workable	1024		M	Kate's Test Film - 2015 [Episodic (60 min)]_Season 01	Episode 02 - EpisodeTwo Kate123-02		8112002	Non-source / Deliverable	Not Required	21-Apr-2015	Researching Asset	Not Required	Not Required	EDL Approved	BBC MAM (Sony DBB)	17-Apr-2015
Not Workable	1024		M	Kate's Test Film - 2015 [Episodic (60 min)]_Season 01	Episode 03 - EpisodeThree Kate123-03		8112004	Non-source / Deliverable	Not Required	21-Apr-2015	Researching Asset	Not Required	Not Required	EDL Approved	BBC MAM (Sony DBB)	17-Apr-2015
Not Workable	1024		M	Kate's Test Film - 2015 [Episodic (60 min)]_Season 01	Episode 04 - EpisodeFour Kate123-04		8112006	Non-source / Deliverable	Not Required	21-Apr-2015	Researching Asset	Not Required	Not Required	Pending	BBC MAM (Sony DBB)	17-Apr-2015

8.5. Export Dashboard Results


Searches run on the **Dashboard** panel can be exported in report format to Excel. The document will contain all **Dashboard** fields as displayed in the search results view.

318 Total Compliance Items

Status

Total Files	Compliance	Video	Subtitles	Audio
712	318	365	6	23

Rows Per Page: 50

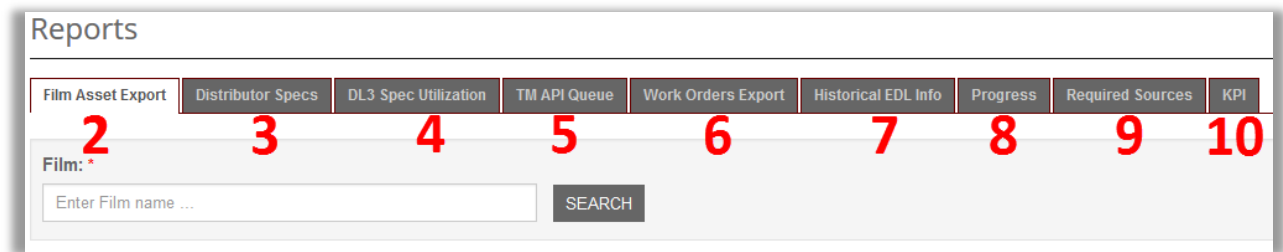


8.5.1. **Export:** Click the **Export** icon at the top right of the search results.

9. Reports

9.1. Usage

As a client, use the **Reports** panel to export Excel-formatted files based on search results within the below nine tabs.



9.2. Film Asset Export

Search using **Film Name**.

9.2.1. Click on search result hyperlinks to download report file.

9.3. Distributor Specs

Search using **Distributor** and/or **Territory**.

9.3.1. Click on hyperlinks in **Distributor Company** column to view **Distributor** details.

9.3.2. Click on the **Export** icon to download the report file.

Last Updated	Last Modified
05-Nov-2014	

9.4. DL3 Spec Utilization

Click to automatically see **Spec** utilization (default) sorted by highest **Job** count to lowest.

9.4.1. Click on hyperlinked number in **Spec No.** column to view **Spec** details.

9.5. TM API Queue

Search by **Work Order** status to view the data of incoming, TaskMaster-pushed (automatically created) **Work Orders**.

9.5.1. Click on hyperlinks in the **Status** column to access the **TM API Queue Title Detail** page.

9.5.2. Click on the **View Input Data** hyperlink in the **Raw Input Data** column to view raw **Work Order** data.

9.6. Work Orders Export

Search using **Work Order** attribute filters at the top.

9.6.1. Click on the **Export** icon to download the report file.

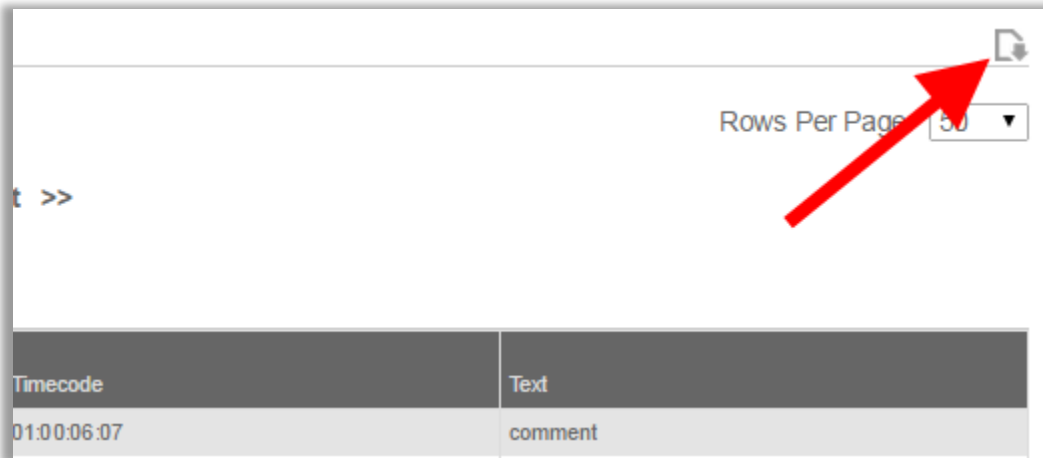
License Start Date	Expected Ship Date	Comply	Language / Type	Notes
29-Apr-2015	16-Apr-2015	No	1	

9.7. Historical EDL Info

Search by keywords in edit comments.

9.7.1. View details of EDLs filtered by searched comments, results which will reflect the search via the search results **Text** column.

9.7.2. Click on the **Export** icon to download the report file.

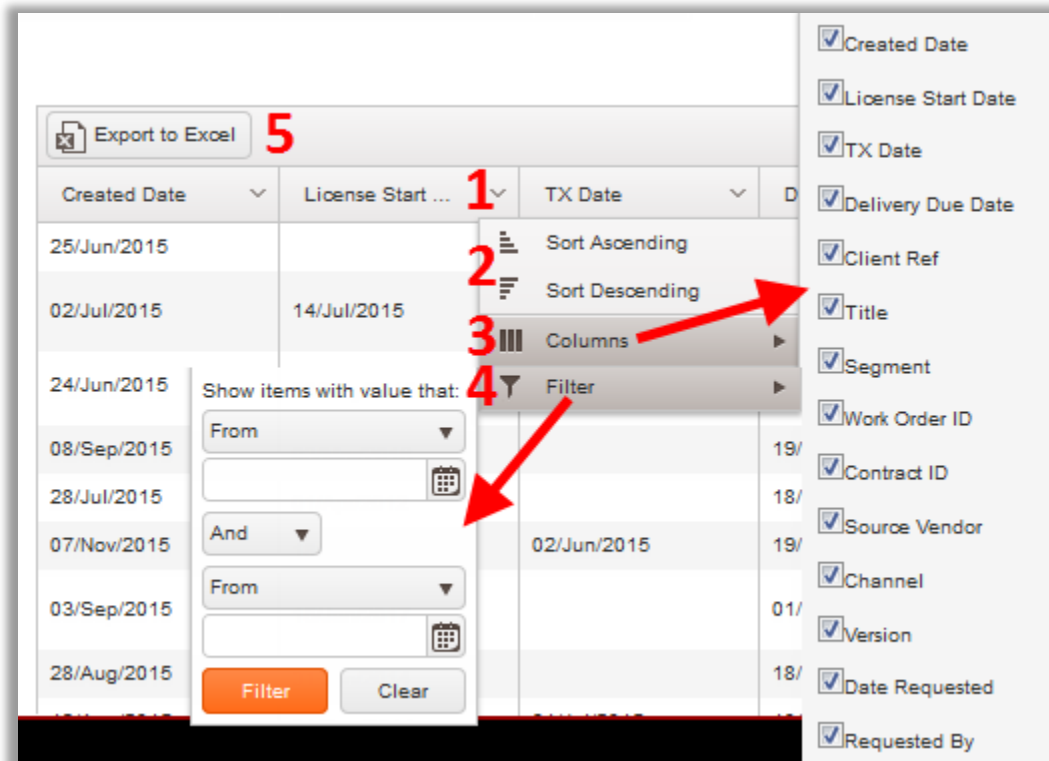


9.8. Progress

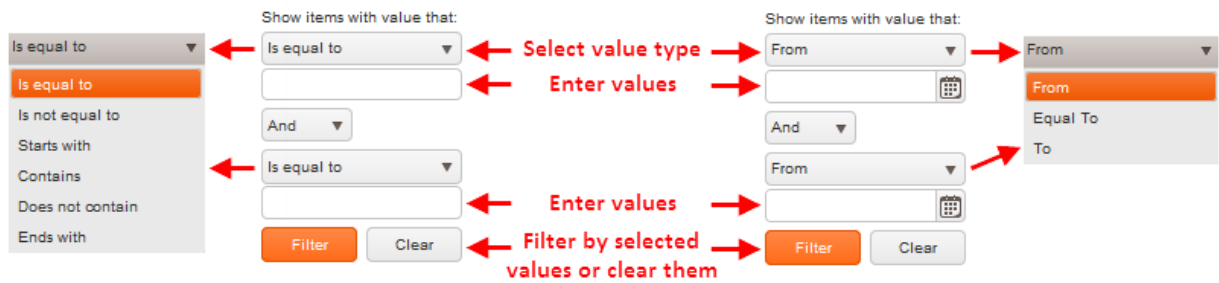
Coming Soon.

9.9. Required Sources

Search for, or filter for, missing required sources in **Jobs** with any of the fourteen **Job** attribute columns on the interface, and then export a report.



- 9.9.1. Click the **Column Settings Menu** arrow to reveal the column settings choices (2-4 above, 9.9.2 through 9.9.4 below).
- 9.9.2. Sort the specific column's data in an ascending or descending order.
- 9.9.3. Place a check in the checkbox next to the names of columns you want visible in the search results (remove checks in checkboxes to hide columns in search results).
- 9.9.4. Filter the values of items in a column by specific criteria selected in the pulldowns, and (if applicable to the data) within a date range selected from the calendars (see below for more details).



- 9.9.5. Click the **Export to Excel** button to export a list (formatted in an Excel file) of the search results.

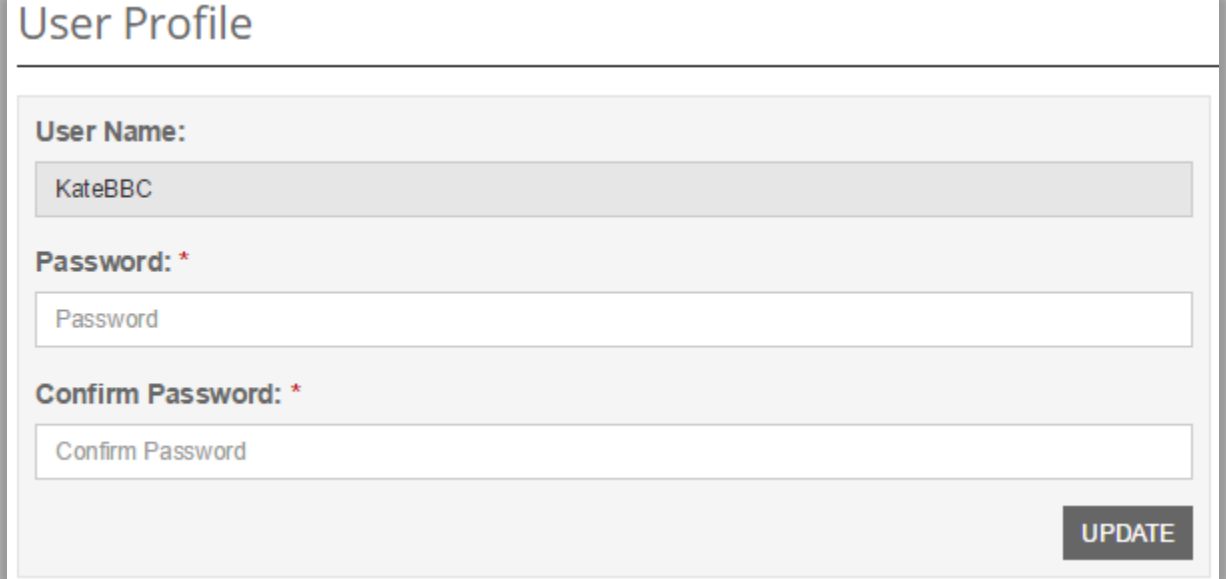
9.10. KPI

Coming Soon.

10. Profile

10.1. Usage

To create a new password for your **Client Portal** account, enter the new password twice, and then click the **Update** button.



The screenshot shows a web form titled "User Profile". It contains three input fields: "User Name:" with the value "KateBBC", "Password: *" (required), and "Confirm Password: *" (required). A dark grey "UPDATE" button is located at the bottom right of the form.

User Profile	
User Name:	KateBBC
Password: *	Password
Confirm Password: *	Confirm Password
UPDATE	

11. Log Out

11.1. Usage

Click to log out of **Client Portal**.