

# TACTIC Quickstart Documentation

| REVISION HISTORY |      |             |      |
|------------------|------|-------------|------|
| NUMBER           | DATE | DESCRIPTION | NAME |
|                  |      |             |      |

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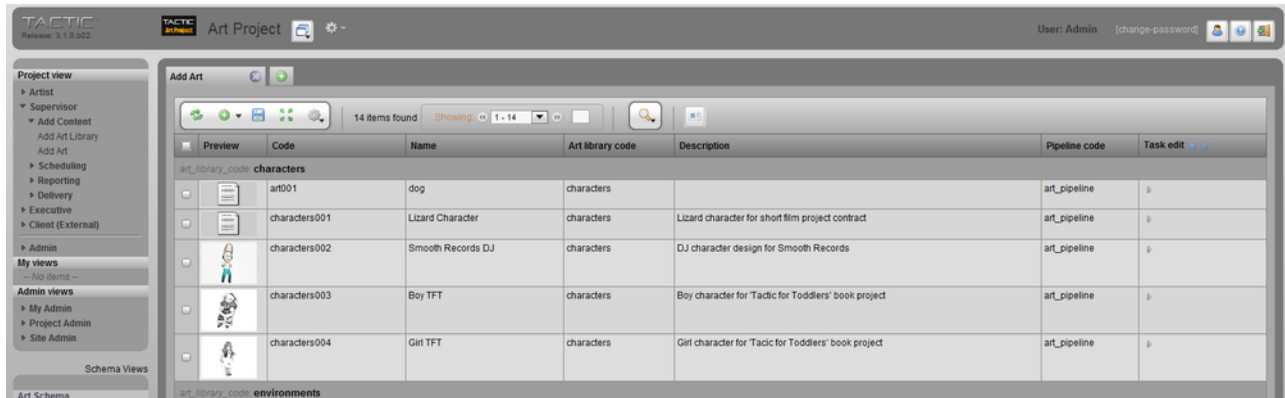
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# 1 TACTIC Startup

## 1.1 The TACTIC Window

When you log in to TACTIC from your browser, you will see a window similar to the following image. This section describes some of the important parts of this window.

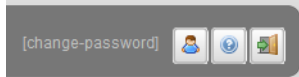


### Header [Left]



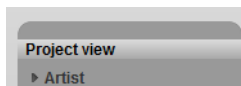
The project bar shows the TACTIC logo and a thumbnail representing the current project.

### Header [Right]



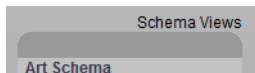
Lets you link to the documentation, sign out, or switch between projects.

### Project Views Sidebar



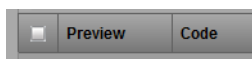
Lets you access all Project Views and "My Views".

### Schema Sidebar



Displays the project schema and the TACTIC system and administration schemas. Access to this sidebar is generally reserved for admin level users.

### Main Panel



The main panel shows views of selected search types and toolsets. (To load search types or toolsets into a separate popup window, hold down the Shift key when you click on them.)

## 2 Views









### 2.1 What are Views?

Views in TACTIC are the main widgets used to display the items in a project. The display of these items vary depending on the view. Views are typically accessed through the sidebar. TACTIC tools and widgets such as tables, dashboards, edit panels and custom HTML interfaces, allow the end user to interact and alter the viewing experience.

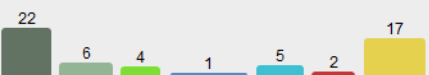
TACTIC Views are extremely customizable and can be configured to meet the specific needs and workflow of the end user. Views also provide quick navigational options such as Search and Grouping, which can be embedded in various layout styles within a panel interface such as a Dashboard.

Below are some examples of the more common widgets used for views in TACTIC.

#### Table

| <input type="checkbox"/> | Preview   | Category | Asset Cod | Title             | Description                          | Keywords                       | Checkin   | History   | Tasks   | Task Pipe                                   |
|--------------------------|---|----------|-----------|-------------------|--------------------------------------|--------------------------------|---|---|---|---|
| <input type="checkbox"/> |  | video    | asset001  | Nuclear Explosion | Stock footage of a nuclear explosion | explosion, fire, nuclear, bomb |  |  |  | des 07/29 -<br><a href="#">Review</a><br>be |
| <input type="checkbox"/> |  | video    | asset002  | Car Chase         | Stock footage of a car chase         | car, chase,                    |  |  |  | des   |

#### Dashboard

| Base Project Demo |       | Tasks (59 Total)  |  |  |  | Project Schedule |        |
|-------------------|-------|---|--|--|--|------------------|--------|
| Total Assets      | 11    |  |  |  |  | ALL TASKS        | Jul 18 |
| Total Tasks       | 59    |   |  |  |  | Design           | Jul 18 |
| Total Completed   | 17    |   |  |  |  | Rough            | Jul 27 |
| Bid Work Hours    | 401.0 |   |  |  |  | Final            | Jul 26 |
| Total Work Hours  | 350.0 |   |  |  |  | Delivery         | Aug 04 |

#### Edit Panel

Edit: project/asset

Save changes to Asset (asset001)

Preview

Browse

Asset Category

video

#### Calendar

| Users                |  | Beth Content Creator |  |
|----------------------|--|----------------------|--|
| content_creator      |  | Schedule             |  |
| Beth Content Creator |  | Tasks                |  |
| Brad Content Creator |  | Work Hours           |  |
| Mark Content Creator |  | +                    |  |
| supervisor           |  | August, 2011         |  |
|                      |  | Su Mo Tu We Th       |  |
|                      |  | 31 1 2 3 4           |  |
|                      |  | design               |  |

### 2.2 Views Quickstart

#### Loading Views

To get started with view, first load a view from the sidebar in your project. Ideally you will have a view with some items available.

Asset Tracking

Schedule

Reports



Review

Library

Manage Lists


13 items found

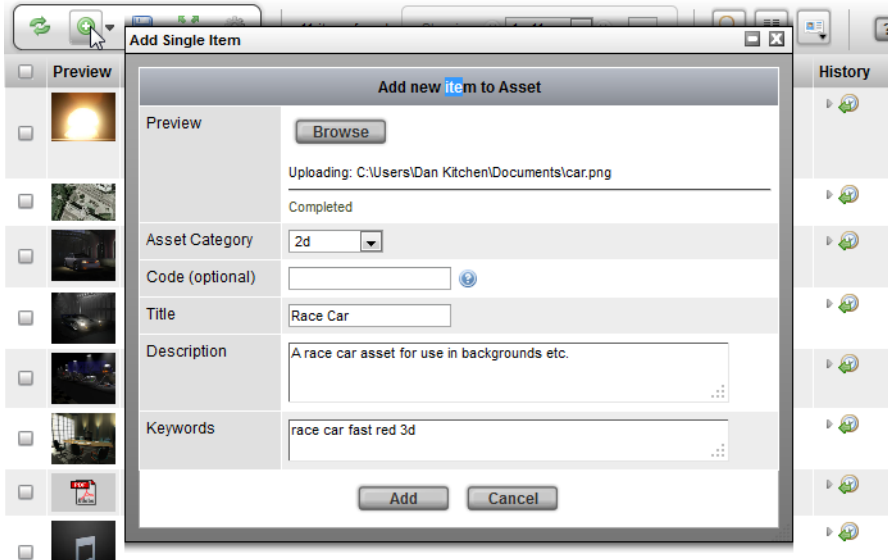
Showing: 1 - 13

| <input type="checkbox"/> | Preview   | Category | Asset Code | Title             | Description                          |
|--------------------------|---|----------|------------|-------------------|--------------------------------------|
| <input type="checkbox"/> |  | video    | asset001   | Nuclear Explosion | Stock footage of a nuclear explosion |
| <input type="checkbox"/> |  | video    | asset002   | Car Chase         | Stock footage of a car chase         |

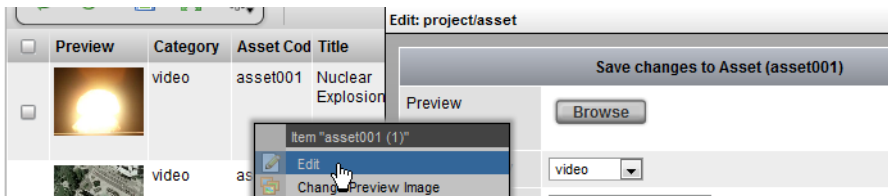
If the view is a Table based view (which is the most common), you will notice that there is an arrangement of columns with tools and data.

### Inserting and Editing Items

To insert a new item, click the  button in the View Shelf

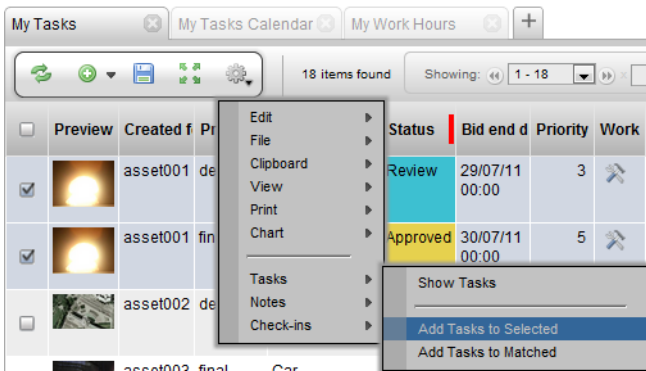


To edit items, click the cells in the table, or right click on an item and choose "Edit".



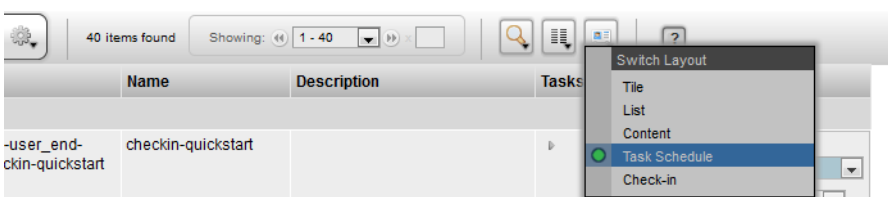
### Gear Menu Options

Selecting items allows for certain actions to become available in the View Gear Menu. For example "Tasks → Add Tasks to Selected"



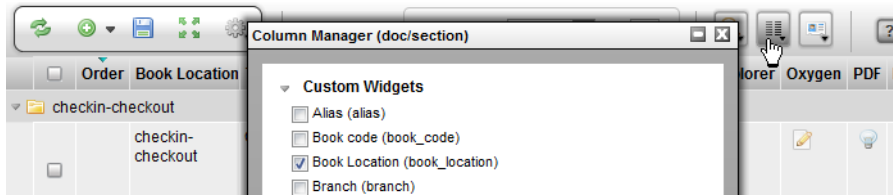
### View Layouts

To change the layout of the view, click the **Layout Switch** button. Each view provides different information and tools.

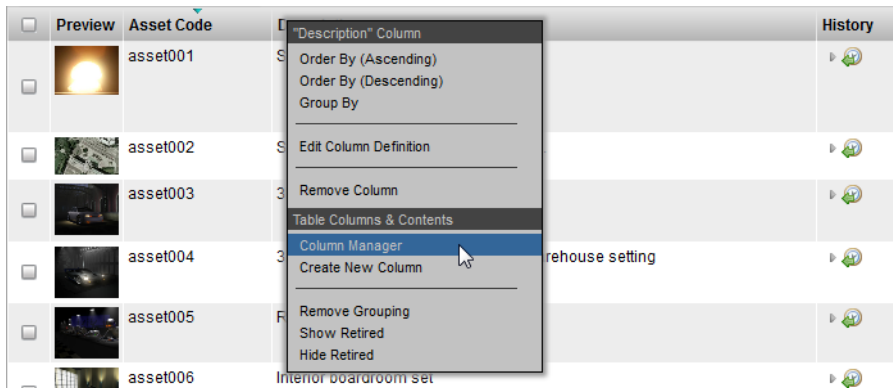


## Add/Remove Columns

To Add Columns to the view, click the **Column Manager** button in the shelf or, right click in the table header and choose "Column Manager"



or



## 3 Search

### 3.1 What is Searching?

With the basis of TACTIC being data (information) storage, a large aspect of working with TACTIC is searching. When looking for items in the project, specific properties are used when conducting a search. Below are some example of typical searches in TACTIC:

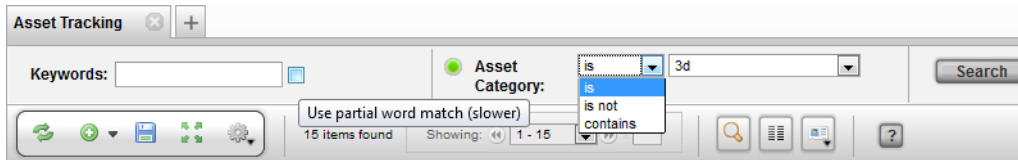
- Tasks with status in review
- Find items by category
- Search by Keywords
- Tasks Due this week
- Tasks Past Due
- Work entered in the current week
- ...and more

Often times, these searches are used daily so having to fill out the search criteria could be redundant. In TACTIC, views can be saved as links in the sidebar which include the search criteria. This in turn causes the view to become a live report which is always up to date.

Searches in TACTIC are carried through 2 primary interfaces:

#### Simple Search

The simple search allows for a simple set of search options for a view.



For the Keywords Search, after inputting the search criteria, either hit the enter key on the keyboard or the Search button to run the search.

### Partial Word Match Check Box

The check box next to the Keywords Search provides an option to find matches on words that contain the input criteria.

For example, if the search criteria is "truck" with the partial word match checked on, example results would include "truck", "dumptruck" and "loadertruck".

Otherwise, if partial word match is not checked on, the results would only include words that match the whole word: "truck".

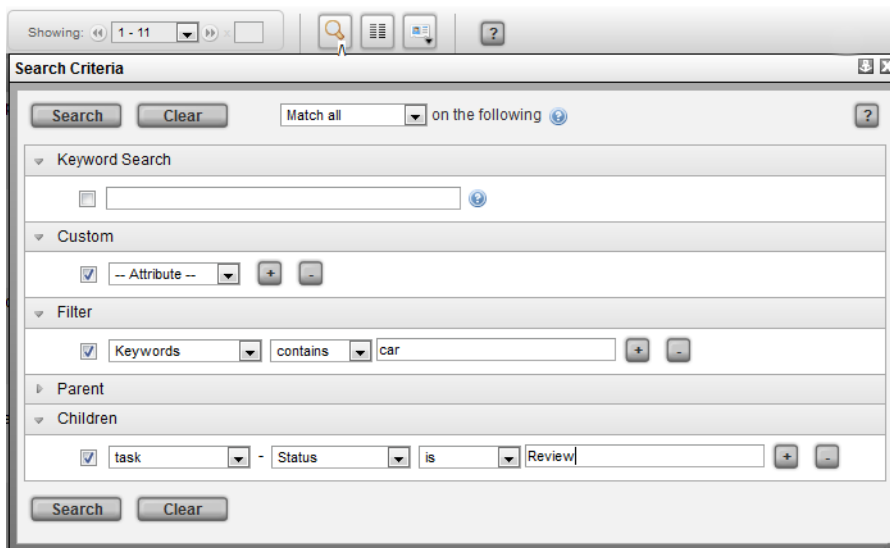
### Operators: Is / Is Not / Contains

In the above example, for the Asset Category, the first drop down provides an operator so that searches can be performed using: **is, is not, contains**

The last drop down menu provides a selection of possible values for the Asset Category to search against.

### Search Box(Advanced Search)

The Search Box can be used to execute simple to very complex searches.



## 3.2 Search Quick start

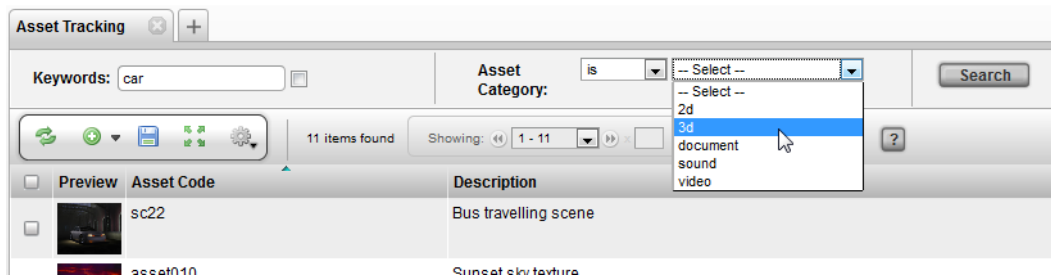
TACTIC provides two main search tools; the Simple Search and the Search Box.

### Simple Search

The Simple Search provides a view specific filters. To use the simple search:

1. Load a view of items in your project. In this example a Keywords field is provided and an Asset Category drop-down narrows down the search even further.
2. Fill in the desired search and click the search button.





will automatically refresh once the search is complete.

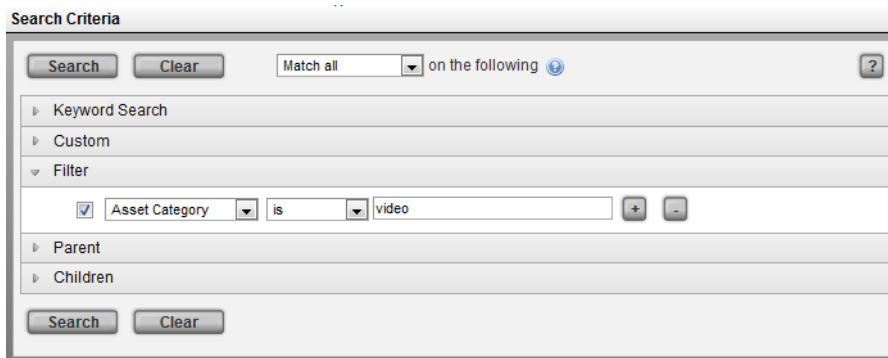
3. The results view

## Search Box

The Search Box can be used to conduct more complex searching in TACTIC. To test a few examples, load a view of items in a project which have Tasks. In this example the view is an Asset view.

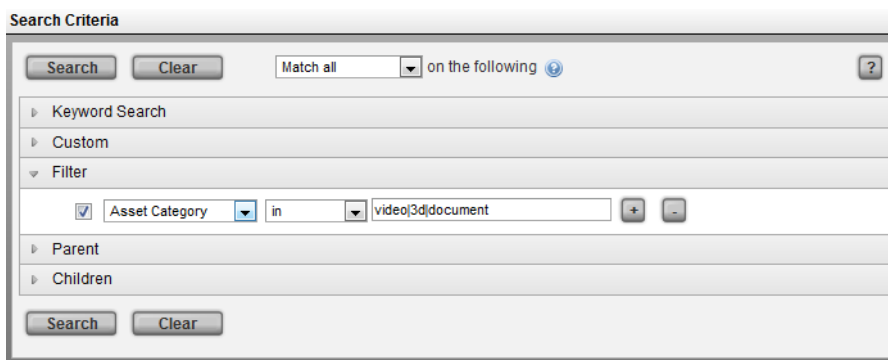
1. To Search for all assets with an asset category of *video* , in the following criteria;

Filter → "Asset Category" "is" "video"



2. To Search for all assets with an asset category of; *video*, *3d*, and *document*, enter the following;

Filter → "Asset Category", "in", "video|3d|document"



3. To search all assets described in example 2 and also include tasks that are approved, enter the following;

Filter → "Asset Category", "in", "video|3d|document"

Children → "Task", "Status", "is", "Approved"

The screenshot shows the 'Search Criteria' dialog box. At the top, there are 'Search' and 'Clear' buttons, a 'Match all' dropdown, and a 'on the following' link. Below this, there are expandable sections for 'Keyword Search', 'Custom', 'Filter', 'Parent', and 'Children'. The 'Filter' section is expanded, showing a single filter rule: 'Asset Category' is 'in' 'video3d|document'. The 'Children' section is also expanded, showing a rule: 'task' is 'Status' 'is' 'Approved'. At the bottom, there are 'Search' and 'Clear' buttons.

4. To find all tasks assigned to the user currently logged in, a simple expression can be used;  
Children → "Task", "Assigned", "is", "{ \$LOGIN }"

The screenshot shows the 'Search Criteria' dialog box. The 'Filter' section is expanded, showing a single filter rule: 'task' is 'Assigned' 'is' '{ \$LOGIN }'. The 'Children' section is also expanded, showing a rule: 'task' is 'Assigned' 'is' '{ \$LOGIN }'. At the bottom, there are 'Search' and 'Clear' buttons.

5. To find all assets with a category of *video* and keyword of *car* or a code that contains *car*;  
Set the top option in the drop-down box to "Compound Search";  
Filter → "Asset Category", "is", "video"  
**and** (click between the filters to activate the and/or)  
Filter → "Keywords", "contains", "car"  
**or** (shift-click between the filters to group the filters)  
Filter - > "Code", "contains", "car"

The screenshot shows the 'Search Criteria' dialog box. At the top, there are 'Search' and 'Clear' buttons, a 'Compound search' dropdown, and a 'on the following' link. Below this, there are expandable sections for 'Keyword Search', 'Custom', 'Filter', 'Parent', and 'Children'. The 'Filter' section is expanded, showing three filter rules grouped by 'and' and 'or'. The first rule is 'Asset Category' is 'video'. The second rule is 'Keywords' contains 'car'. The third rule is 'Code' contains 'car'. At the bottom, there are 'Search' and 'Clear' buttons.

6. To execute complex searches using an expression to find all assets which have check-ins with versions higher than 1;  
Filter → ".\*Expression", "have", "@OBJECT(sthpw/snapshot[version, >, 1])"

**Search Criteria**

Search Clear Match all on the following ?

Keyword Search

Custom

Filter

☒ \*\*Expression - Results have

@SOBJECT(sthpbw/snapshot['version', '>', 1])

Parent

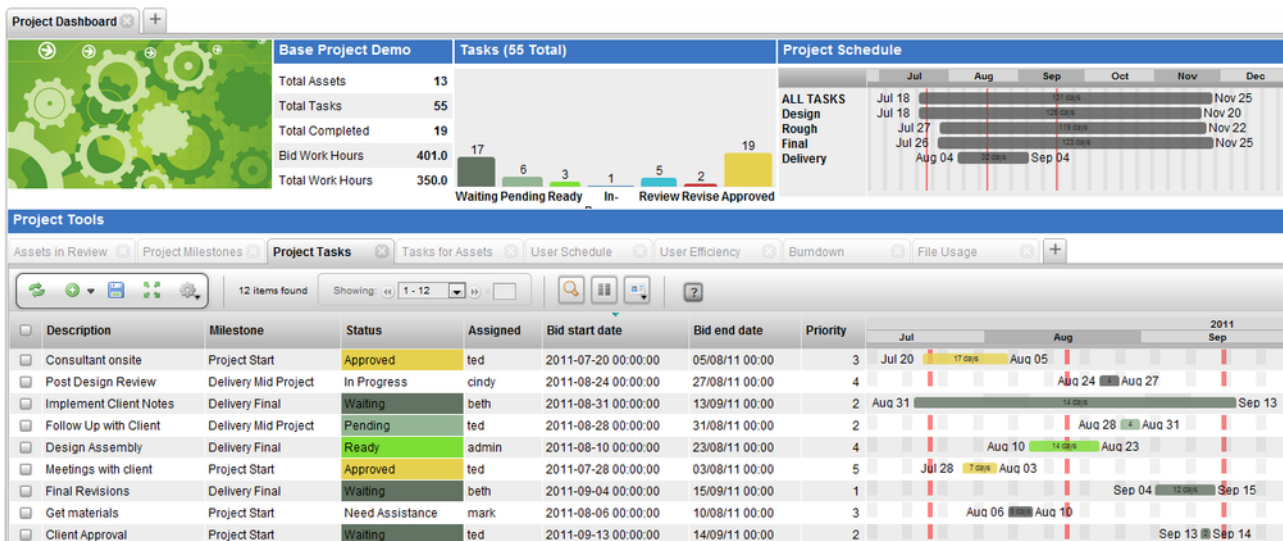
Children

Search Clear

## 4 Tasks











### 4.1 What are Tasks?

The TACTIC Tasks feature allows for the creation and management of Tasks. Each task in TACTIC include various properties that define and manage the work-flow of a user. Various markers such as; "Assigned", "Supervisor", "Bid start date", "Bid end date", and task "Status" enable all designated users real time information on the progress of a particular task. These tasks can be created arbitrarily or on individual assets or files. Tasks are often driven by a pipeline process that a particular item will move through during it's life cycle.















Other details about tasks:

- Tasks can be assigned to any type of item in a project.
- Tasks can be grouped into milestones. The milestone column is used to categorize benchmark dates for a project.
- Tasks can be assigned to particular users. When a task is assigned to a user, it appears in their My Tasks View.

| My Tasks  |           |         |                          |          |          |   |
|---|-----------|---------|--------------------------|----------|----------|---|
| My Tasks Calendar My Work Hours   |           |         |                          |          |          |   |
| 18 items found Showing: 1 - 18  |           |         |                          |          |          |   |
| Preview   | Created f | Process | Description              | Status   | Priority | Work  |
|  | asset001  | design  | Explosion_045            | Review   | 3        |  |
|  | asset001  | final   | Explosion_045            | Approved | 5        |  |
|  | asset002  | design  | Design Task for asset002 | Pending  | 5        |  |
|  | asset003  | final   | Car model_003            | Review   | 3        |  |
|  | asset003  | rough   | Car model_003            | Approved | 4        |  |

- Tasks can be associated to a specific time-line. The "Bid start date" and the "Bid end date" column displays when the user is scheduled to work on a task, and when it is scheduled to be complete.
- Bid duration (hours) can also be specified for tracking the allotted hours for a given task. These can later be compared to work hours for efficiency and cost analysis and reporting.

| Preview   | Created f | Process | Description              | Status   | Priority | Work  | Bid start date      | Bid end date      | Bid Ho | 2011 |     |        |        |     |
|---|-----------|---------|--------------------------|----------|----------|---|---------------------|-------------------|--------|------|-----|--------|--------|-----|
|   |           |         |                          |          |          |   |                     |                   |        | May  | Jun | Jul    | Aug    | Sep |
|    | asset001  | design  | Explosion_045            | Review   | 3        |    | 2011-07-29 00:00:00 | 29/07/11 00:00:00 | 7.0    |      |     | Jul 29 | Jul 29 |     |
|   | asset001  | final   | Explosion_045            | Approved | 5        |    | 2011-07-26 00:00:00 | 30/07/11 00:00:00 | 24.0   |      |     | Jul 26 | Jul 30 |     |
|  | asset002  | design  | Design Task for asset002 | Pending  | 5        |  | 2011-07-18 00:00:00 | 23/07/11 00:00:00 | 5.0    |      |     | Jul 18 | Jul 23 |     |
|  | asset003  | rough   | Car model_003            | Approved | 4        |  | 2011-08-03 00:00:00 | 04/08/11 00:00:00 | 6.0    |      |     | Aug 03 | Aug 04 |     |
|  | asset003  | final   | Car model_003            | Review   | 3        |  | 2011-08-02 00:00:00 | 05/08/11 00:00:00 | 7.0    |      |     | Aug 02 | Aug 05 |     |
|  | asset004  | final   |                          | Approved | 2        |  | 2011-08-08 00:00:00 | 11/08/11 00:00:00 | 21.0   |      |     | Aug 08 | Aug 11 |     |

## Managing Tasks with a Pipeline

A typical project will have assets that need to be tracked throughout the entire course of the project. If each of those assets goes through a pipeline with a various number of processes, the Tasks list can become vast quickly, therefore it's important to filter views based on the needs of the user.

Example scenarios could include:

- A director wants a view that shows all items with a task status that is set to "review."
- A user wants to view only "character" items with task status set to "assigned."
- A producer wants to view all items with task status set to "approved."
- A coordinator wants to see all tasks that are due in the current week.

## The Default TACTIC Task Status Pipeline

The default TACTIC task pipeline includes the following status'. Please note that these defaults are easily configurable to suit the needs of the project:

- **Pending:** The task is waiting for a user to start working on it.
- **Ready:** The task status has been set to ready by the supervisor or administrator.
- **In Progress:** The task is in progress or being worked on.
- **Waiting:** The user is waiting on some event before he or she can continue working on the task.

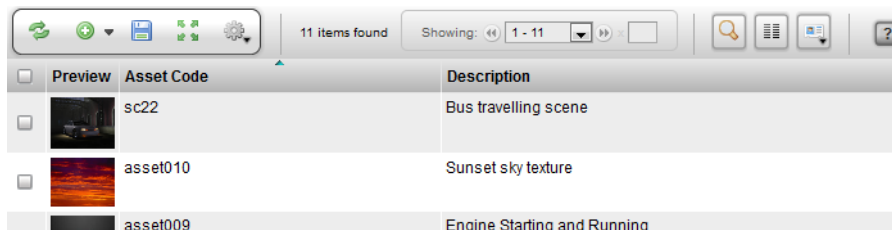
- **Review:** The supervisor is reviewing the task.
- **Approved:** The task is approved and complete.
- **\*Review:\*** The supervisor has been notified to review a task.

| Status      | Assigned |
|-------------|----------|
| Review      | brad     |
| Waiting     | eth      |
| Pending     | eth      |
| Ready       | eth      |
| Review      | eth      |
| Revise      | eth      |
| Approved    | eth      |
| In-Progress | eth      |
| Waiting     | bobby    |

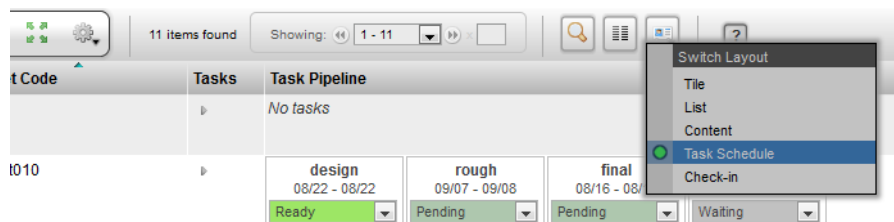
## 4.2 Tasks Quickstart

After inserting a new item into a project, often the first things to do is to create a new task, assign it and have the appropriate user work on it.

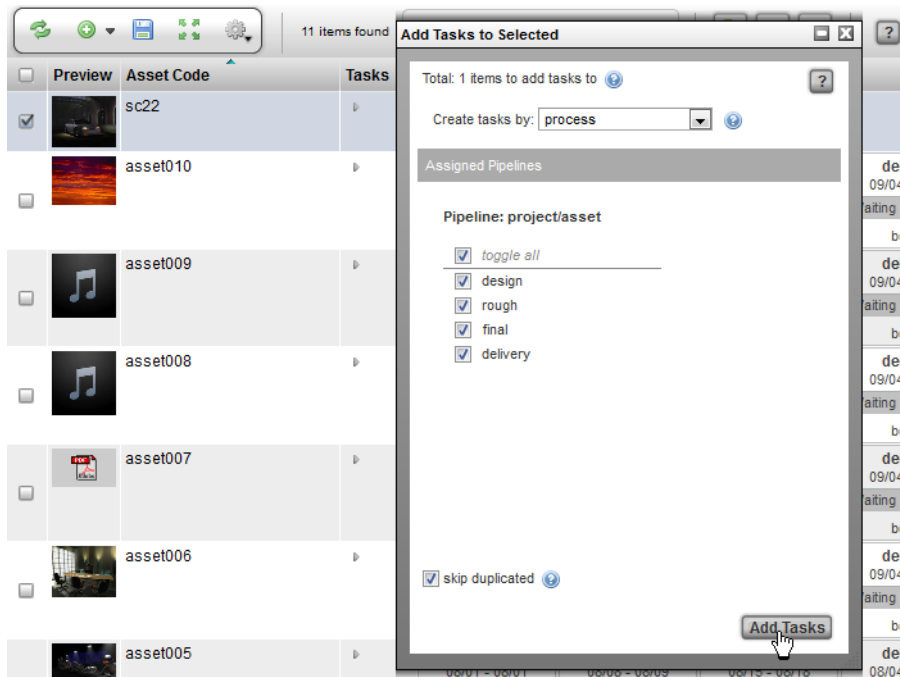
1. Load any view of items you wish to track tasks for.



2. If the task status edit column is not in your view, you can add it with the column manager or switch the Layout to "Task Schedule"



3. If no tasks exist, click the (+) icon in the task status edit column. Another option is to select the items and choose Tasks → Add Tasks to Selected from the Gear Menu. Both approaches will load the task insert pop-up.

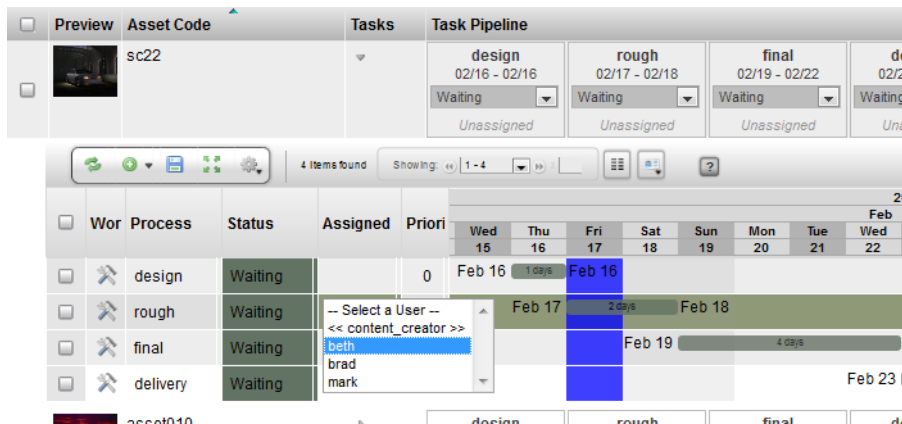


For now, click create tasks to create tasks for all process available in the pipeline.

#### Note

If a pipeline has not been setup for the particular Type you will not see any processes available in the UI. This will require building a pipeline which is covered in the TACTIC Setup Documentation

- Once tasks are created, you will be able to assign them to users, assign dates, priority etc.



## 5 Notes

### 5.1 What are Notes?

**Notes:**

▼ **design (2)** +

▼ Aug 10 - 22:35 - [cindy] - Please work on the particle effects.




**design**  
Please work on the particle effects.

---

Attachments: 0

▼ Aug 08 - 19:50 - [beth] - There was some trouble with this please have a l ...



**design**  
There was some trouble with this please have a look.




---

Attachments: 0

Notes are the ideal communication tool to use to store the message thread that occurs between content creators, supervisors, clients, etc.

TACTIC Notes are used to add and track comments on an item. A history of the previous notes are tracked with the item and can be viewed in the notes history. Each note contains the process for the item, the timestamp, who added the note and any file attachments. Optionally, each note can also be sent as an email and can be automated with rules to send to the correct user groups. Notes can be associated to a pipeline process with Tasks and Check-ins (Snapshots). Using this association, the communication of the progress of each individual can be accurately tracked and retrieved by a supervisor at any time for a production to the smallest detail.

### 5.2 Notes Quick Start

| Preview   | Asset Cod | Description                          | Notes   |
|---|-----------|--------------------------------------|---|
|  | asset001  | Stock footage of a nuclear explosion | <p>▼ <b>design (2)</b> +</p> <p>▼ Aug 10 - 22:35 - [cindy] - Please work on the particle effects.</p> <div>  <p><b>design</b><br/>Please work on the particle effects.</p> <hr/> <p>Attachments: 0</p> </div> <p>▼ Aug 08 - 19:50 - [beth] - There was some trouble with this please have a l ...</p> <div>  <p><b>design</b><br/>There was some trouble with this please have a look.</p> <hr/> <p>Attachments: 0</p> </div> |

1. First, load a view of items you wish to track notes for.

If the Notes column is not already in the view, it can be added through the column manager.

#### Note

In TACTIC 3.7+, the notes column can also be added to your view in the gear menu under Notes → Add Notes Column

2. Click the [+] on in the notes column on the item you wish to add a note to.

3. In the add dialog, first select the process. If no tasks are assigned the process will be "default" otherwise, the task processes will be available in the list
4. Add the note then click submit.

### Note

If notifications are setup, an email will also be sent for the note. If you would like to setup automated emails Please review the Notifications section in the TACTIC Setup documentation.

## 6 Check-in and Check-out

### 6.1 Check-in Quick Start

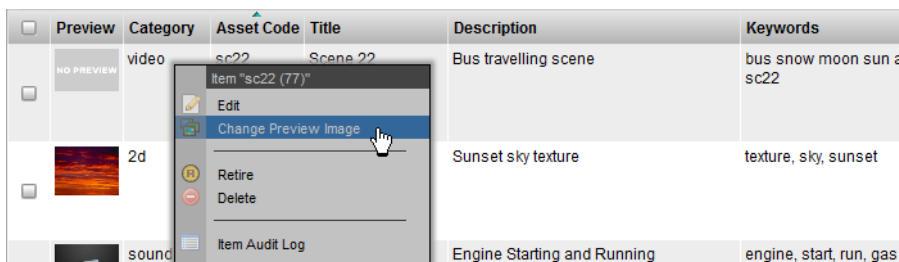
The simplest form of a check-in within TACTIC is to check-in a preview image for an item.

1. Locate an item you wish to check-in a preview for.

### Note

If the preview column is not included in your view, you can add it through the Column Manager.

2. Right-Click on the item and in the context menu choose "Change Preview Image"



3. This will load a file browser where you can choose a preview image to check-in. Once the file has been uploaded, the preview thumbnail will automatically update.

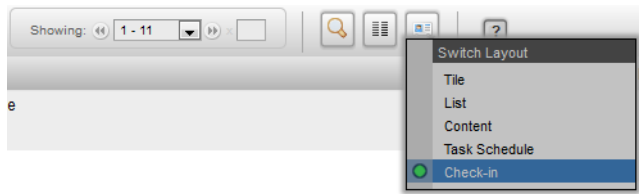
| Preview | Category | Asset Code | Title      | Description          | Keywords                 |
|---------|----------|------------|------------|----------------------|--------------------------|
|         | video    | sc22       | Scene 22   | Bus travelling scene | bus snow moon sun a sc22 |
|         | 2d       | asset010   | Sunset Sky | Sunset sky texture   | texture, sky, sunset     |

4. To view where the files were placed, expand the **History** column.

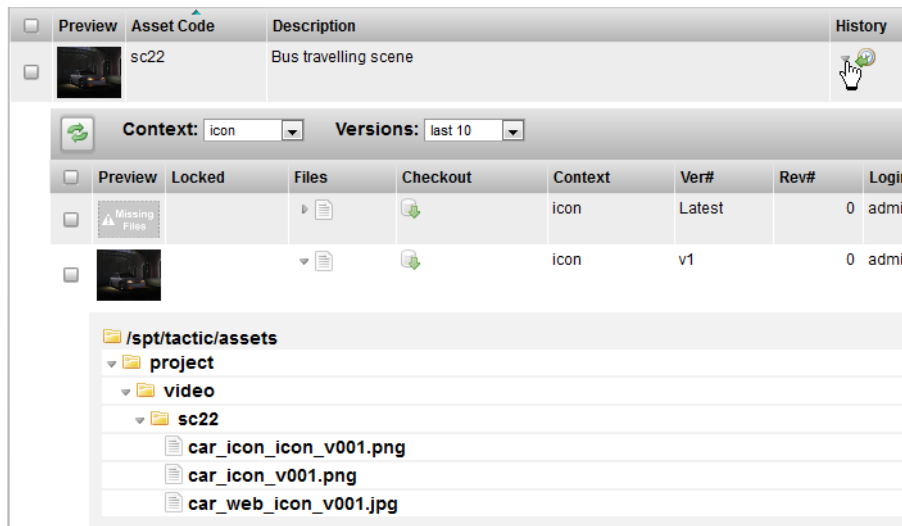
### Note

If the History column is not in the view, it can be added with the Column Manager, or the view can be changed to "Check-in" from the layout menu.





5. Look for your "**icon**" check-in. This is the snapshot entry where you will see the check-in information (version, login, process, timestamp etc)
6. You can expand the "Files" column to see the location of the files in the central repository.



## 6.2 What are Check-ins?

Check-ins or "Snapshots" in TACTIC represent files, directories, sequences etc that are checked in from a users computer to the servers central repository. This process is no different than if the user were to correctly name and place the files on the server individually but, TACTIC handles this automatically resulting in a clean, organized repository.

As a user there is also no need to worry about the versioning files as this is automated through the snapshot records. You simply choose which process the file is being checked into and TACTIC handles the rest.

When a file is checked in, an entry is created for that item which contains references to the process, version, date/time, who did it and where the file is on the server. If tasks exist for the item, check-ins often occur against those tasks which results in a direct relationship between the task and the check in providing a history of files for that particular process.

### Naming Conventions

Naming conventions in TACTIC are used to automate the naming of the directories and files in the central repository. Although strictly controlled, it is important to note that these conventions are configurable and are simply used to guide where the files are stored. By default TACTIC is delivered with a set of naming conventions that often work well.

How naming conventions work is that a check in occurs, TACTIC is able to use information about the item being checked into, the task and the new version information to properly control where the files are copied to and what they are named in the repository. For example if checking into "design" for "character001" and the next version is 4, the resulting file structure might look like:

```
my_project/assets/character001/design/character001_design_004.jpg
```

### Latest and Current

When files are checked in, it is often good to know which version is the latest version. Although at times, the highest version or last check in is not the version that should be delivered. "Current" is a way of flagging a check in as the deliverable check-in regardless of what the version number is. For example, you may have versions 1-10 for a "design" process but, version 7 is the

approved deliverable check-in. Setting this check-in to "current" will flag it as the deliverable for either downstream pipeline processes or, for final delivery.

**Versionless**

By default, TACTIC simply created a new version within a process each time a check in occurs. Users can then checkout the desired version either by current/latest or by choosing a version. On top of this is the ability to generate a latest or current versionless files each time the current/or latest changes either during a check in or manually in the interface. This file is either a direct copy or a link depending on the setting in your project.

For more information on configuring version less check-ins, please review [Project Automation](#) → [Naming Conventions](#) in the [TACTIC Setup Documentation](#).