

TACTIC End-User Documentation

REVISION HISTORY

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1 Introduction to TACTIC

1.1 Introduction to TACTIC

What is TACTIC?

TACTIC is an extensible, web-based data and file management system. TACTIC centralizes the following aspects of digital project workflow:

- Production data management
- Scheduling
- File (Asset) Management
- Communication
- Reporting
- and more

How does TACTIC work?

TACTIC manages two aspects of Digital Content Management: Project data and Files. TACTIC maintains both of these components in one unified source.

Project Data	Project data is stored in the Database	Project Data is the information and lists that are traditionally tracked in spreadsheets. TACTIC has the ability to list all files you manage along with task assignments, status', and scheduling data, which can be viewed in simple table formats or complex custom reports. TACTIC eliminates lost email threads, missing documents, and the need to update complex spreadsheets. The "database" is the base location for all data. i.e. notes, reports, schedules etc. What a database provides is a central location for this information.
Content/Files	Files stored in the File System	Content refers to the actual files. When managing assets/files the directory and file naming, along with proper version control is what makes TACTIC unique. Files in TACTIC are managed externally in a file system. i.e. hard drive. The file server typically has a root <i>assets</i> directory. From this location, TACTIC handles the filenames and directories for that file system.

What can I do with TACTIC?

End-Users have various roles within a project or organization. The TACTIC interface can be moulded to provide each group (department) with the ideal interface.

The TACTIC security architecture is a rules-based system where each End-User is provided with a login. The End-User is assigned to groups determined by the project leader or administrator. These rules determine what the End-User has access to within TACTIC.

Communication between groups and departments can be tracked in real-time by using the TACTIC Notes functionality. This method eliminates lost email threads and misplaced documents.

TACTIC can manage limitless amount of tasks, the status of those tasks and the location of all files being managed. TACTIC gives the End-User an accurate real-time understanding of how a project is progressing.

The table below illustrates how various End-Users may interact with TACTIC in a single organization.

Content Creator	The Content Creator often requires a view of all tasks assigned. The user can update a status, check in and check out files, log work hours and communicate with Supervisors using the Notes widget.
Supervisor/Manager	The Manager/Supervisor is often required to schedule tasks, manage content and resources. The project schedule can be adjusted in the User Schedule or Project Tasks view. The TACTIC interface provides high level planning, communication and reporting tools. The Supervisor often has access to all views which provides the ability to plan and adjust the overall needs of a project quickly and easily.
Client	Clients often need to review project material (documents, videos, images etc) and managing this continuous feed of content is often a hurdle. TACTIC's built in web technology allows Clients to deliver files and provide real-time feedback without FTP or Email. TACTIC can provide Clients with only the specific views and permissions needed for each project.
Executive	Executives require a high level view of the project. This often involves building views or "reports" that correlate data from all aspects of the project. TACTIC is able to provide cost reporting, completion, efficiency and location of bottlenecks.

What can I do in TACTIC?

TACTIC is a transaction system allowing users to search, interact, update and report on project data and files. These interactions are carried out using a few main operations:

- **Search** - Search query results are often displayed in a list where you can interact with your project data.
- **Insert** - Additions or "Insert" new data is often done at the start of a new project. This is done through various interface tools like forms, multi inserts, CSV import and more.
- **Update** - Updating existing data is sometimes required. For example; updating a status, adding keywords, or changing an assigned user. Specific views and tools also allow for selecting multiple items to edit at one time.
- **Check-in** - Part of TACTIC's power is the ability to check in and manage your files/assets. When you do a check-in, TACTIC versions and names the directories and files in your file server. Files remain organized and will never become lost.
- **Check-out** - When you need to work on some files that are already checked into TACTIC, you can check them out. This process either points you to the where the files are located, or downloads them to your computer.
- **Undo/Redo** - Every action carried out within TACTIC can be undone. If a mistake has been made, simply undo the transaction.

How do I access the TACTIC interface?

TACTIC is delivered as a web site. This web based solution is extremely powerful because it allows for full interaction with TACTIC and also direct integration with supported software packages.

Accessing TACTIC is as simple as visiting your server's address (URL) in your web browser. For example:

<http://yourcompany.southpawtech.com>

Lets Get Started!

The following End-User documentation provides general usage of the TACTIC feature set. Additional information, tutorials, forums and documentation is available on our TACTIC Community site:

<http://community.southpawtech.com>

2 TACTIC Start up

2.1 Setting Up Your Web Browser

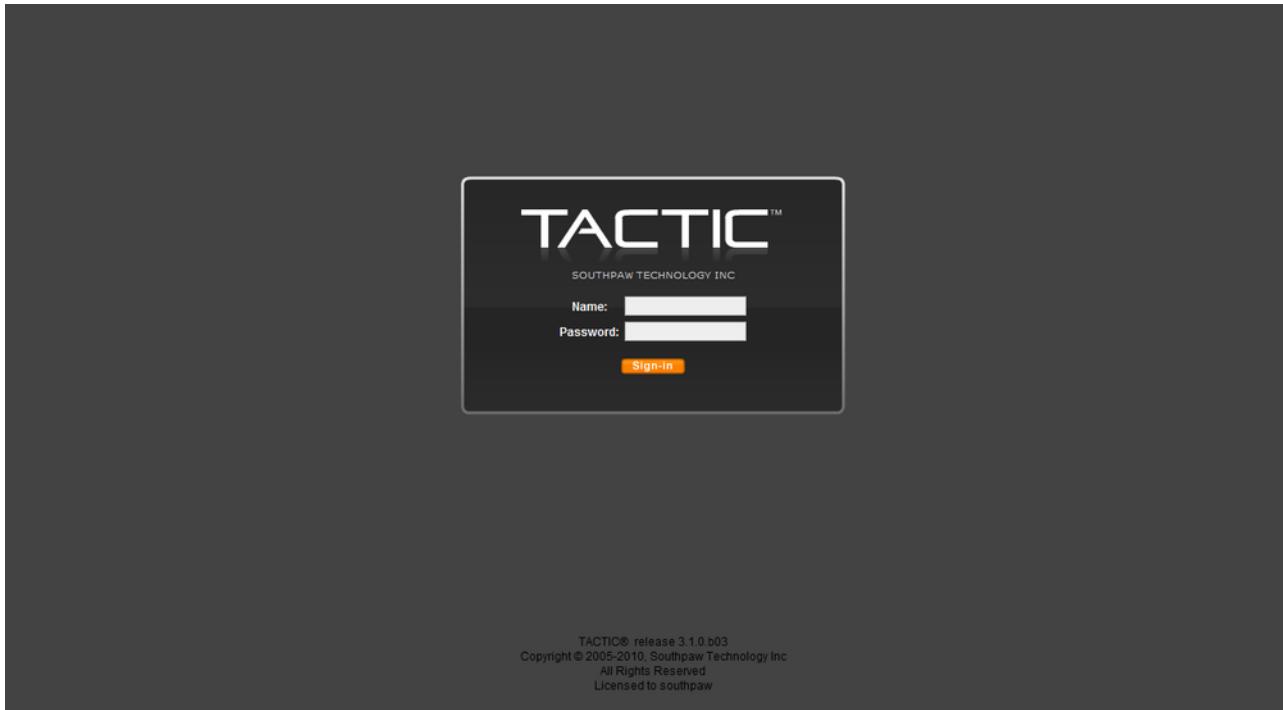
Web Browser

To access the TACTIC interface, a supported version a web browser is required.

To connect to the TACTIC server, type a URL in your web browser similar to the example below (the IP address will vary depending on the network setup of your organization). An example is shown below:

http://192.168.14.198/

When you are connected to the server, you are presented with the TACTIC login screen:



Note

If you cannot see this TACTIC login, please contact your TACTIC Administrator.

Java Support

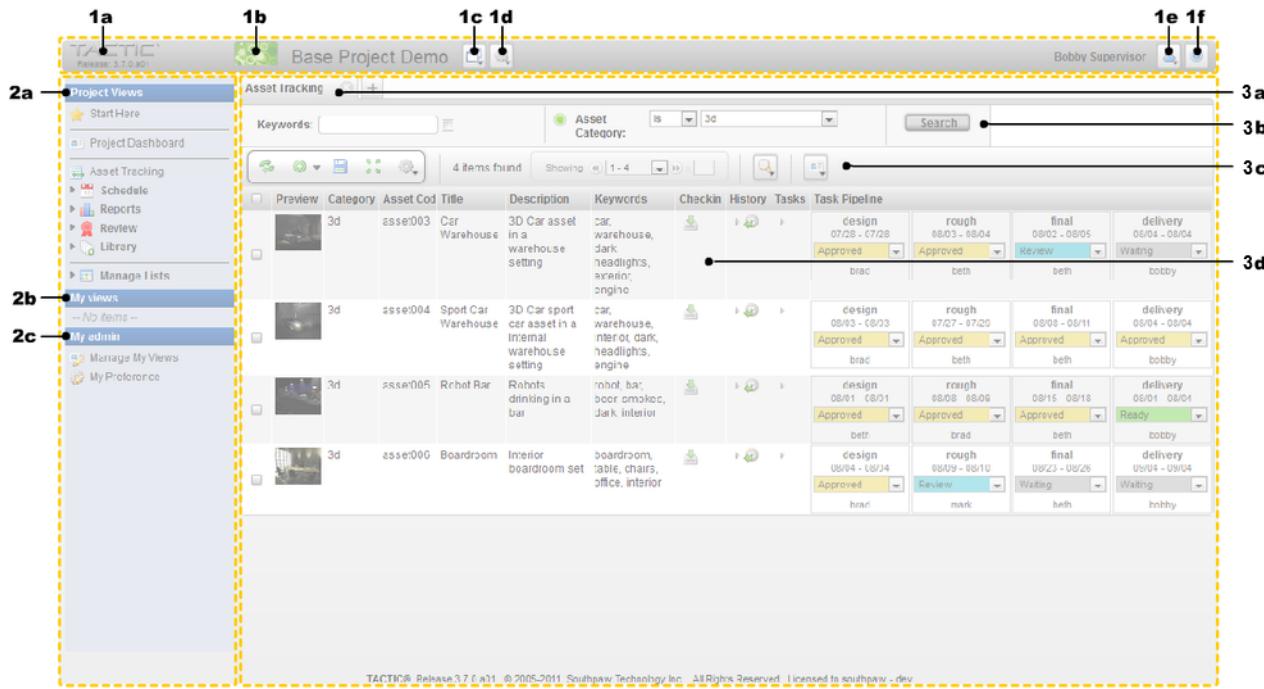
For certain transactions to occur between TACTIC and the client computer, Java will need to be installed. Currently TACTIC supports: Java JRE 1.6.0+

To download the Java Runtime application, please visit:

<http://www.java.com>

2.2 Interface Map

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.



1 - Header

1a	Project Homepage Link	The project bar shows the TACTIC logo and release. This link will also direct you back to the project selection page.
1b	Project Thumbnail	This area shows the name of the project and thumbnail.
1c	Project Selection Menu	A drop down list to switch between projects.
1d	Main Action Menu	Main TACTIC Actions menu.
1e	User Menu	Allows for editing of basic user settings
1f	Main Help Link	Loads the Built in TACTIC Help (documentation, links etc)

2 - Sidebar

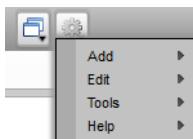
2a	Project Views	Project Views contains links to different views with information about the project as well as workflow.
2b	My Views	My views is a collection of views that are custom created by the login user for personal use.
2c	My Admin	My Admin displays the Tactic system, as well as the project and administration schema. Access to this part of the sidebar is generally reserved for admin level users.

3 - Main View Panel

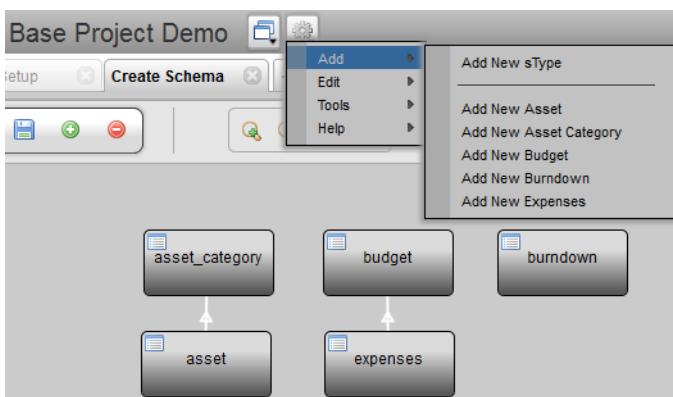
3a	Tabs	Tactic supports loading multiple tabs, similar to how web browsers handle tabs. Views can be loaded into tabs either automatically or through right-clicking on a link.
3b	Simple Search	In some views, a simple search will be included. The Simple Search option provides a quick and easy way to search specifically within the current view in use.
3c	View Toolbar	In some views, there will be tools which are specific to the view. For example, the "Table" view provides an array of tools for interaction with that table.
3d	Main Panel	The Main Panel is where the actual results of the view are displayed. This can be a table, tile layout, dashboard etc.

2.3 TACTIC Gear Menus

Top Gear Menu



Add



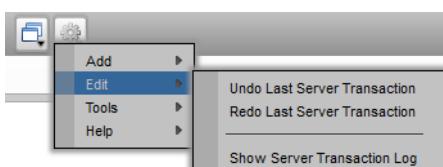
Add New sType

Add a new sType to the schema.

Add New <...existing sType from schema...>

Open a new tab and pop-up a window to insert a new item of the existing sType from the schema.

Edit



Undo Last Server Transaction

Undo the last transaction.

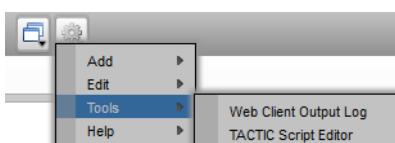
Redo Last Server Transaction

Redo the last transaction.

Show Server Transaction Log

Display the Transaction Log in a pop-up. The log holds all the transactions since the creation of the project.

Tools



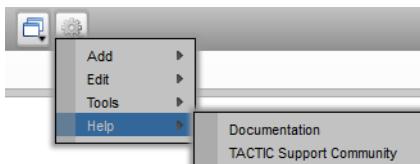
Web Client Output Log

Load the Web Client Output Log. This log details TACTIC output as well output from statements in scripts.

TACTIC Script Editor

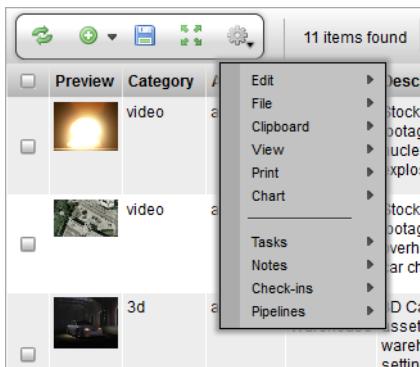
Load the TACTIC Script Editor pop-up.

Help

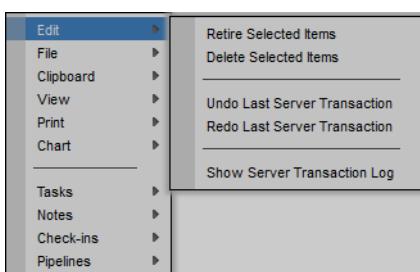


Documentation	Open a new page to TACTIC's Documentation.
TACTIC Support Community	Open a new page to TACTIC's Support Site.

Gear Menu for the View

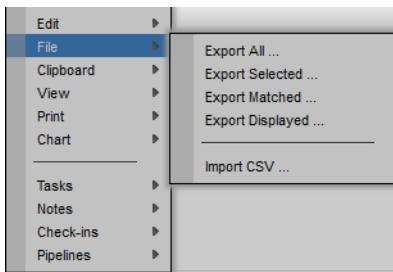


Edit



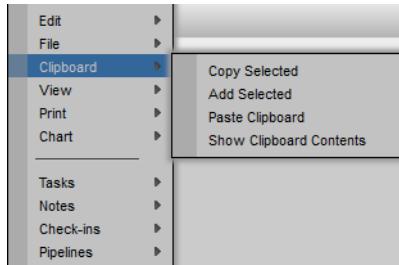
Retire Selected Items	Retire the selected items. Retired items are hidden from the view, but not removed from the database.
Delete Selected Items	Delete the selected items. Deleted items are removed from the database and are no longer available.
Undo Last Server Transaction	Undo the last transaction
Redo Last Server Transaction	Redo the last transaction
Show Server Transaction Log	Load the TACTIC Transaction Log. The Transaction Log holds all the transactions since creation of project.
Add Tasks to Selected	Add tasks to the selected items.
Add Tasks to Matched	Add tasks to the matched items.

File



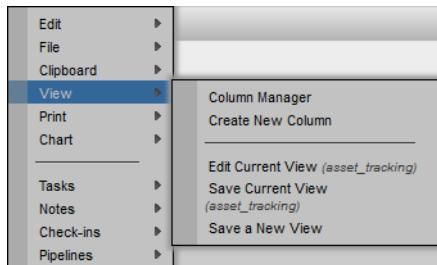
Export All ...	Export all of the item in the view.
Export Selected ...	Export all of the selected items in the view.
Export Matched ...	Export all of the Matched items in the view.
Export Displayed ...	Export all of the displayed items in the view.
Import CSV ...	Import a CSV file.

Clipboard



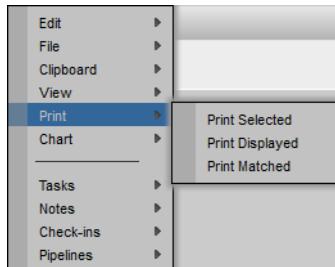
Copy Selected	Copy the item that is selected in the view (indicated with a check mark) to the clipboard.
Add Selected	Add the item that is selected in the view to the list of items already on the clipboard.
Paste Clipboard	Paste the items from the clipboard to the current view.
Show Clipboard Contents	Display the contents of the clipboard in a pop-up window.

View



Column Manager	Pop-open the Column Manager.
Create New Column	Pop-open the Create New Column Window
Edit Current View	Edit the current view.
Save Current View	Save over the existing view with the current configuration.
Save a New View	Save the current view as a new view in the sidebar.

Print



Print Selected	Print all the selected items in the view.
Print Displayed	Print all the displayed items in the view.
Print Matched	Print all the matched items from the search criteria.

Chart

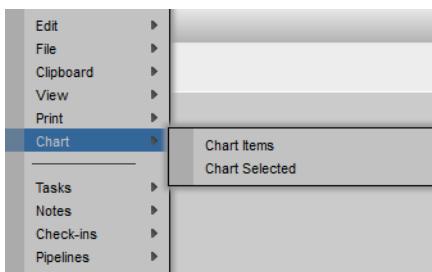
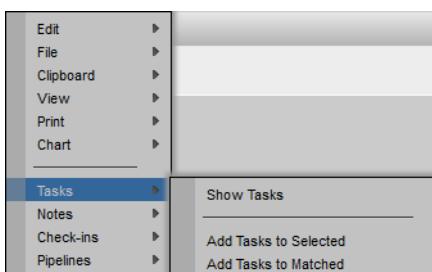


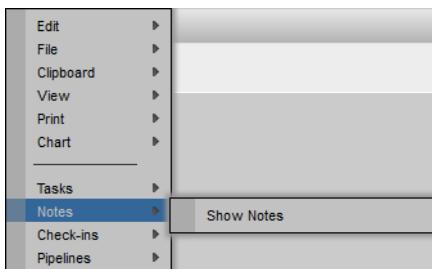
Chart Items	Create a chart of displayed view.
Chart Selected	Create a chart of the selected items.

Tasks



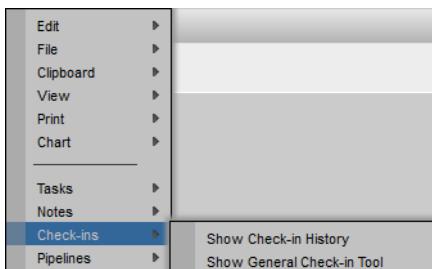
Show Tasks	Add the Task Edit column to the view.
Add Tasks to Selected	For the items that are currently selected in the view, add tasks to them.
Add Tasks to Matched	For all the items returned by the search, add tasks to them.

Notes



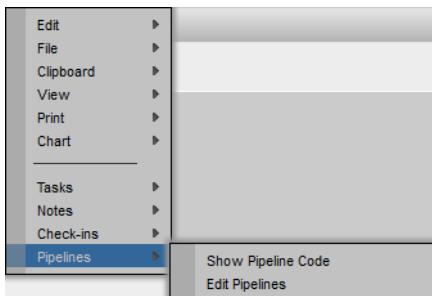
Show Notes	Add the Notes column to the view.
-------------------	-----------------------------------

Check-ins



Show Check-in History	Add the Checkin History column to the view.
Show General Check-in Tool	Add the General Check-in Tool as a column to the view.

Pipelines



Show Pipeline Code	Add the Pipeline Code column to the view.
Edit Pipelines	Open the Workflow Editor in a new tab.

2.4 Internationalization

TACTIC supports international unicode characters for almost all elements in the interface. Most elements in the interface accept unicode character streams natively. This makes it possible to customize a project in any native language.

The following show an image of using TACTIC in Japanese:

The screenshot shows the TACTIC interface in Japanese. The left sidebar includes sections for Project Views (色々なうる, My views, Admin views), Schema Views (Japan Schema, Config Schema, Admin Schema), and Admin Schema. The main area displays a search result for '日本語のプロジェクト' (Japanese Project) with 2 items found. One item is a preview of a yellow flower image with the code '1日本 色 黄色'. Below this is a table with columns: Pro, Context, Sub, Desi, Mile, Status, Assigned, Supe, Pric, and a timeline from Week 08 to Week 16. The table contains several rows of data, including one with a pink rose image and the color 'ピンク'.

The following sections of TACTIC are capable of using unicode characters:

Notes

All notes, including the discussion widget and the notes sheet can accept unicode characters.

<show example here>

Data



Column Headers

<show example here>

Side Bar



Pipeline

<show example here>

Limitations

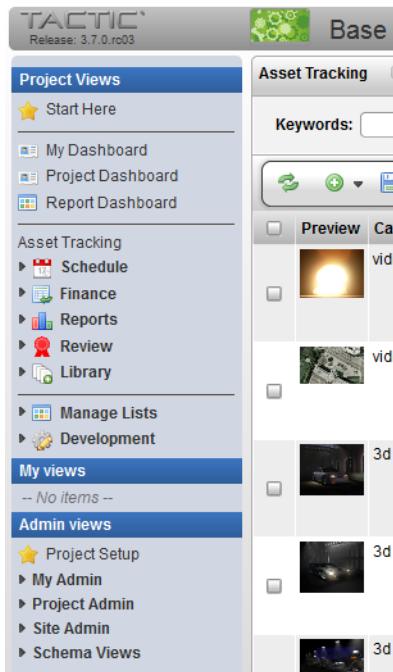
There are certain areas where it is recommended to use Latin-1 characters. These sections may be able to use unicode characters for certain uses, but areas have been found where these sections can cause issues.

- **Project codes:** project codes are used to generate the URL of the project and the database of the project. PostgreSQL accepts database unicode database names quite well but URL with unicode characters are not typically accepted or used. It is recommended that project codes stay with alpha_numeric character set with underscores as a delimiter
- **Search Types:** search types are used to identify a type of subject. These search types are often identified in code. It is not typical to see unicode characters in code, although this may be changing as computers and languages support becomes more ubiquitous. However, there are still many areas in computing where unicode characters are not supported and it is possible that limitations will occur. The TACTIC interface and database generally accept unicode strings with issue.
- **View Names:** View names are stored in the database as XML. An example of this is as follows:

```
<config>
<xxx>
  <element name="foo"/>
</xxx>
</config>
```

where "xxx" is the view name. Most XML libraries will accept tags with unicode characters, however, some do not support them completely. This can cause issues when doing searches and xpath through xml documents. For this reason, it is recommended to use alpha_numeric characters with underscore delimiters for view names. The view name does not typically appear in the user interface for users, so this does not usually cause an issue.

2.5 Sidebar



The TACTIC sidebar is the main menu system for navigating through the views in the TACTIC Project. The access rules applied to a specific account determine the contents of the sidebar as well as which views are displayed when a user is logged in.

The items in the sidebar provide links to existing views within a project. These views are built by your organization's production manager based on a selection of columns (properties), layouts (order and column width) and a search. If a search view is available, it provides a dynamic report based on the definition of the search.

The sidebar is divided into three different categories, "Project Views", "My Views" and "Admin Views".

	<p>The Project Views provides a way to save project wide views that everyone across the entire project would want to see. It also has a manageable list of custom user views. The Project Views can be defined by the person in the role of the project manager. Views can also be hidden from specific user groups. My View contains a list of links to views that were created by the login user themselves. These usually are created by the user to cater to their own personal work flow.</p>
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Admin Views

Admin Views displays the project schema and the TACTIC system and administration schemas. Access to the Admin Views section of the sidebar is generally reserved for admin level users.

My Admin - My Admin holds views that will allow the users to manage My Views and My Preferences.

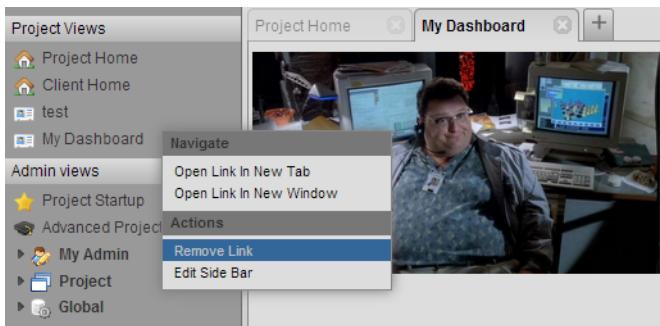


Manage My Views	Edits the views saved in the "My Views" section.
My Preference	Preferences include: Debug, Web Client Logging Level, Color Palette, Language, Quick Text for Note Sheet Thumbnail Size

You can add any view to the sidebar very easily. If you have a view open in a tab, you can simply right click on the tab and select "Add to Side Bar". This will add the link to the sidebar under the Project Views. This will allow you to customize the sidebar and let you quickly open your important views which you use regularly.



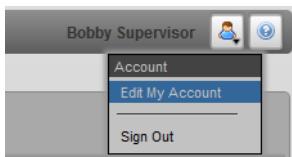
Now, "My Dashboard" will be a link in the sidebar which takes you to this view. You can just as easily remove this link from the sidebar by right clicking on the link and selecting "Remove Link".



3 Preferences

3.1 How to Change Your Password

1. Log in and go to the top right hand corner of the screen. The name of the current user logged into TACTIC session is displayed here. Click on the button labelled "My Account". From the context menu, select "Edit My Account".



2. Type in the new password and re-confirm it in the following field.

A screenshot of a 'My Account' dialog box. At the top, it says 'Save changes to Users (bobby)'. Below is a preview image of a person wearing a cap and sunglasses. Underneath the image is the file name 'login_bobby_web_icon_v001.jpg'. The form contains the following fields:

Preview	<input type="button" value="Browse"/>
Login	<input type="text" value="bobby"/>
Password	<input type="password" value="*****"/>
Password re-enter	<input type="password" value="***** "/>
First name	<input type="text" value="Bobby"/>
Last name	<input type="text" value="Supervisor"/>
Email	<input type="text" value="dan@southpawtech.com"/>

At the bottom are 'Save' and 'Cancel' buttons.

Modify any other account information that needs to be updated and hit **Save**.

4 Interface Usage

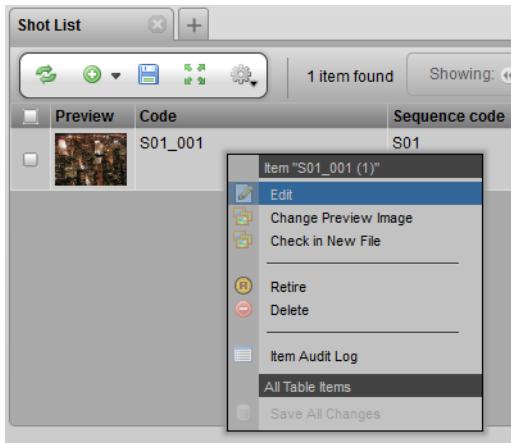
4.1 Edit

Introduction

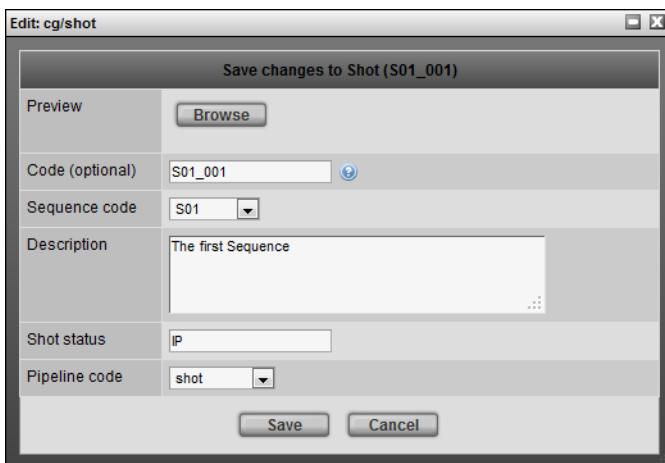
The following describes how to edit the data in various views of TACTIC.

Editing Using a Form

To edit a row of data, right click anywhere on the row and select "Edit" from the context menu.



A form pop-up to edit the data will appear. The description on the left side indicates what data to enter into the input fields.

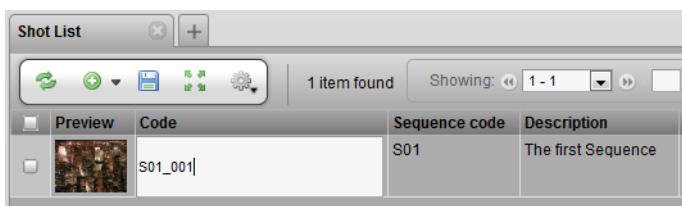


Editing Inline

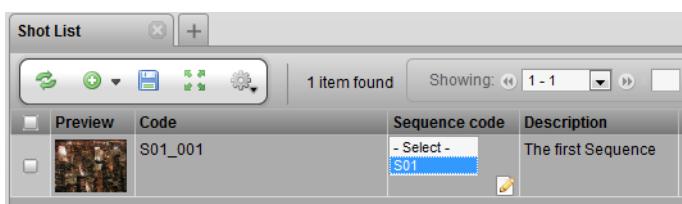
Clicking on a field within the row allows editability only if edit mode for that column is enabled.

Below is a few examples of edit modes for the various widgets:

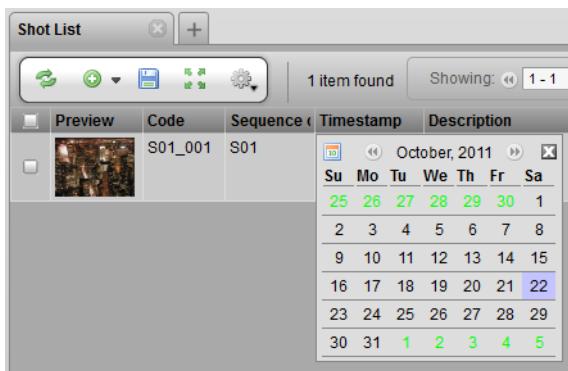
The edit mode for the Text Widget is most common. This widget allows keyboard entries into editable fields.



The edit mode for the Selection Widget is displayed below. The widget restricts your input choices to the options in the drop down selection menu.

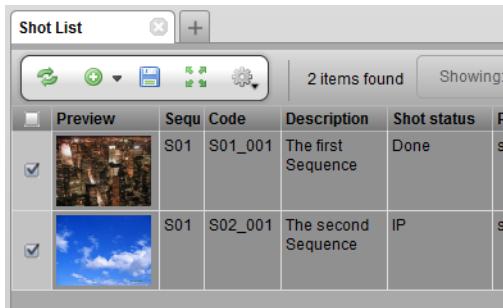


The edit mode for the Calendar Widget is displayed below. The Calendar widget pops-up a monthly calendar for convenient date selection.

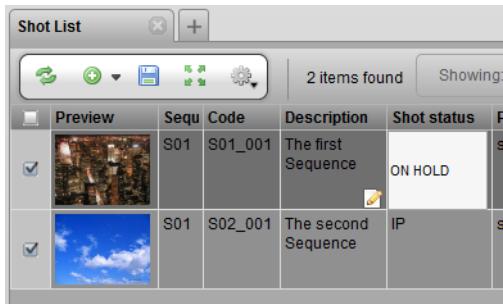


Multi-Edit

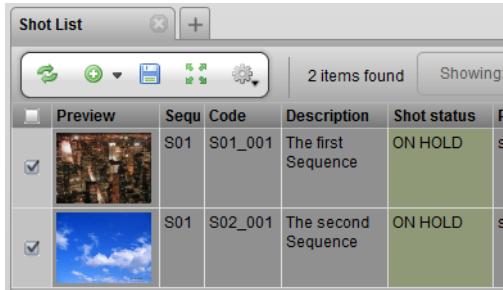
To modify the more than row so that they all have the same data, first check mark the rows to be edited.



Left click on a cell in the column to be edited. The row will go into edit mode.



Once the text is entered, click off the cell. All cells selected will have the same data.



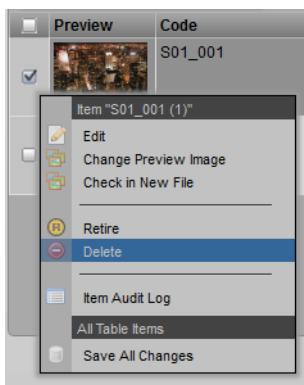
4.2 Delete and Retire

Introduction

TACTIC provides many ways to delete and retire items directly from the view. Retiring is TACTIC's way of marking an item so that it does not appear in any searches, but allows the user to bring it back if necessary. The methods to delete and retire an item are described below.

Deleting from the Context Menu

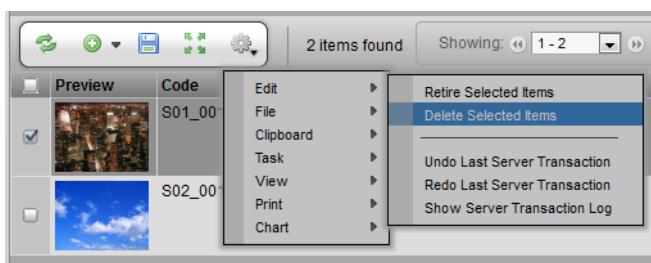
To delete an item from the view, first put a check mark in the box next to the item you want deleted. Then, right click anywhere on the row to bring up the context menu. Selecting the "Delete" option will delete the object from the view and from the database.



Deleting from the Gear Menu

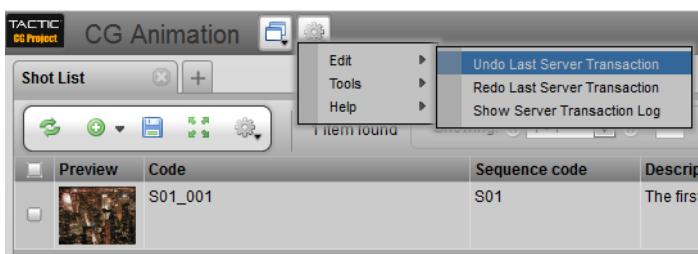
Alternatively, the gear menu can be used to delete an item from a view.

1. Put a check mark in the box next to the item.
2. In the tool shelf and click on the gear to bring up the gear menu.
3. Selecting the "Delete" option will delete the object from the view and from the database.



Note

If an item is deleted by mistake, to undo this action, go to the top gear menu, select Edit → Undo Last Server Transaction.

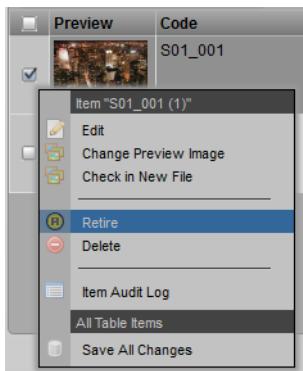


Retiring from the Context Menu

To mark an item as "Retired", first put a check mark in the box next to the item. Then, right click anywhere on the row to bring up the context menu. Selecting the "Retire" option will mark the object as retired and filter it out from the view.

Note

Items will still exist and can be brought back. The next section will show how to view items that have been marked as "Retired".



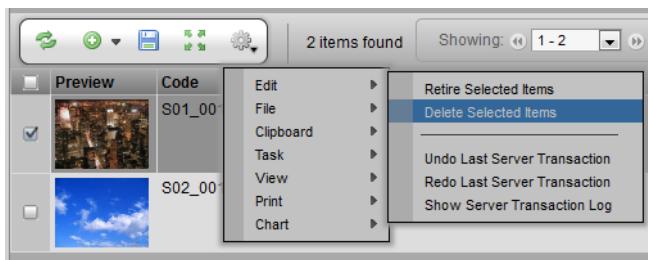
Retiring from the Gear Menu

To retire an item from the view using the gear menu:

1. Put a check mark in the box next to the item.
2. In the tool shelf and click on the gear to bring up the gear menu.
3. Selecting the "Retire" option will mark the object as retired and filter it out from the view

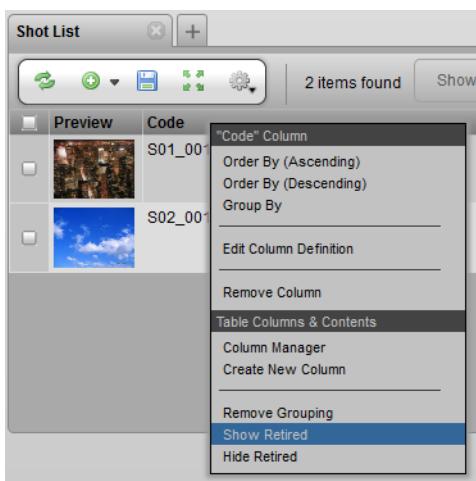
Note

The item will still exist and can be brought back. The next section will show how to view items that have been marked as "Retired".



Showing Retired Items

When an item is "retired", it has simply been marked as "retired" in the database. The item still exists in the database and can be brought back. To show items that have been retired in a view, go to any column header and right click. This will bring up a context menu. Select "Show Retired".



Note

The items marked as "retired" appear highlighted in red.

Preview	Code	Sequence code
	S01_001	S01
	S02_001	S01

4.3 Creating and Editing Views

The screenshot shows the TACTIC Shot List interface. At the top, there is a search bar with fields for 'Job Code' (is, --Select--), 'Assigned' (is, --Select--), and 'Sequence Code' (is, --Select--). Below the search bar is a toolbar with various icons. The main area is a grid table titled 'Shot List' with the following columns: Preview, Job, Sequence, Shot, Frame count, Source sta, Pipeline cod, History, and Task edit. The grid contains several rows of shot data, each with a thumbnail preview. Some rows have a red background, indicating they are retired. The status bar at the bottom shows 'Showing: 1 - 100'.

TACTIC provides the following configuration display options when creating or editing a view:

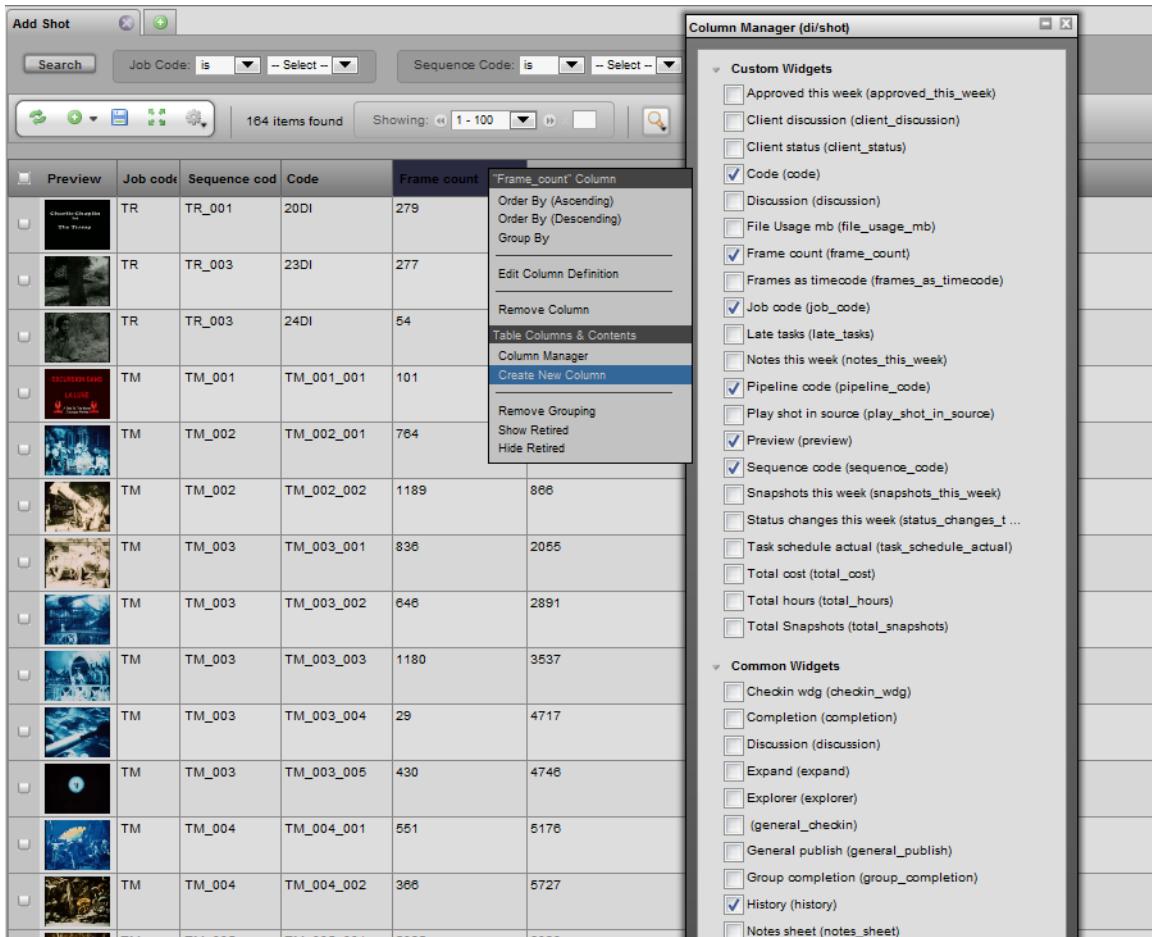
- Which columns are part of the view
- The order of the columns
- The width of each column
- The Grouping of the items
- The Search which has been applied to the view

In TACTIC, there are 2 main distinctions between the types of views **Project Views** and **My Views**. These are presented in 2 sections within the main sidebar.

- **Project Views** - Project views are presented to all users in the production and/or can be hidden based on group access rules. Project views are also generally only created by the project manager and the ability to save and modify them can also be blocked with group access rules.
- **My Views** - My views are views saved per user. It allows for saving of personal views outside of the project views. These will only be available to the user who created them.

Adding Columns

To add a column, right-click on any column header in the view.



Select the Column Manager

In the column manager, selecting columns will add them to their current view. The sections in the column manager are as follows:

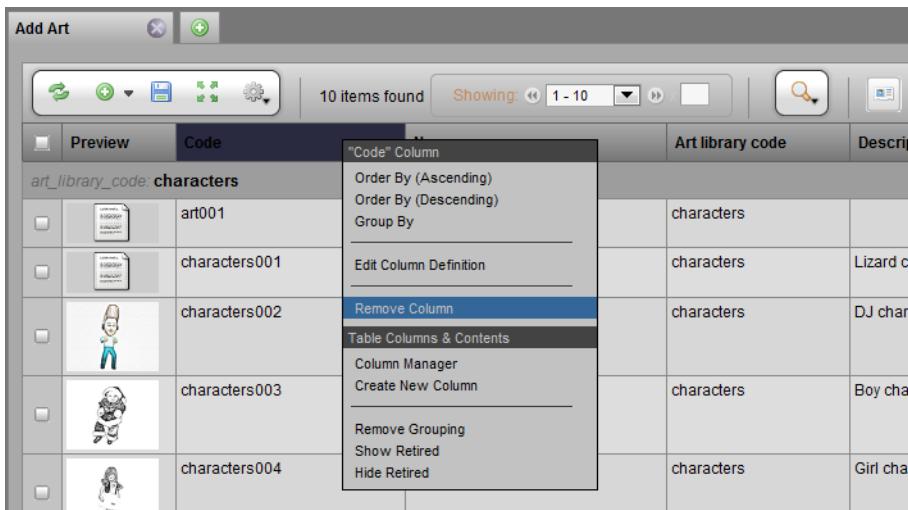
- **Custom Widgets** - These are the custom widgets which have been defined for the current type. These represent both changes to information (i.e.. switching a code) as well as tools which represent certain actions for that type (i.e.. a button which loads the asset into an application)
- **Common Widgets** - These widgets are similar to the ones above but, are common to all types in TACTIC. They are tools which are generally universal.
- **Raw Database Columns** - These are the raw data (property) columns which exist for the type. Generally, each is represented by a Property Column but, this allows adding of the data in its raw format. For example, a task has *start_date* and *end_date* database columns but, there may be a *schedule* column which displays the start_date and end_date together in a calendar widget.

Note

Certain widgets require Java to be started up so, it can take a few seconds for the selected column to actually appear in the view. When finished, click the close button.

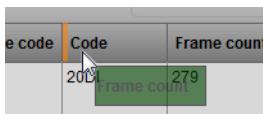
Removing Columns

To remove a column from the current view, left click in the column header for the column to be removed and choose **Remove Column**. Columns can also be removed through deselecting them in the column manager.



Ordering Columns

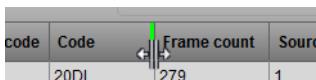
To re-order columns, click and drag a column in the header to the desired location in the view. As the column header is dragged to the left or the right, an orange bar will appear between the columns indicating where the column appears if the mouse button is released.



Resize Columns

To resize a column width, hover the pointer over the divider between the column headers and the mouse pointer will change to a width adjuster.

Left click and drag the width adjuster to change the width of the column.



Grouping

Some columns in TACTIC contain categorical data. Some examples include *status*, *parent*, *assigned user* columns. These columns can be grouped.

For example, grouping by the Assigned User column displays the items in groups by each user.

Parent	Process	Status	Assigned	Pri	Notes art	Snapshots art	Work Hours	Dec	Jan	Feb	Mar	2011	Apr
assigned: brad													
vehicles002	colour	approved	brad						Dec 22	Dec 26			
characters001	colour	approved	brad								Jan 28	Jan 31	
environments002	colour	assigned	brad						Dec 20	Dec 26			
assigned: jimmy													
vehicles001	delivery	Review	jimmy								Feb 01	Feb 01	
vehicles002	delivery	assigned	jimmy								Feb 01	Feb 01	
characters001	delivery	assigned	jimmy								Mar 05	Mar 05	
characters002	delivery	assigned	jimmy								Mar 05	Mar 05	
characters003	delivery	assigned	jimmy								Mar 05	Mar 05	
characters004	delivery	assigned	jimmy								Mar 05	Mar 05	
environments001	delivery	assigned	jimmy								Jan 22	Jan 22	
environments002	delivery	assigned	jimmy								Jan 22	Jan 22	
art001	delivery	assigned	jimmy									Mar 07	Mar 07
env003	delivery	assigned	jimmy								Jan 22	Jan 22	
assigned: mark													
vehicles001	colour	approved	mark						Dec 17	Dec 20			
vehicles001	rough	approved	mark						Dec 13	Dec 15			
vehicles002	rough	approved	mark						Dec 21	Dec 22			
characters001	rough	approved	mark								Jan 24	Jan 24	

To apply grouping to a view, left click on the column header to be grouped and choose **Group By**

Parent	Process	Status	Assigned	D	Notes art	Snapshots art	Work Hours
vehicles001	rough	approved	mark	Order By (Ascending)			
vehicles001	colour	approved	mark	Order By (Descending)			
vehicles001	delivery	Review	jimmy	Group By			
vehicles002	rough	approved	mark	Edit Column Definition			
vehicles002	colour	approved	brad	Remove Column			
vehicles002	delivery	assigned	jimmy	Table Columns & Contents			
vehicles002	delivery	assigned	jimmy	Column Manager			
vehicles002	delivery	assigned	jimmy	Create New Column			
characters001	rough	approved	mark	Remove Grouping			
characters001	colour	approved	brad	Show Retired			
characters001	delivery	assigned	jimmy	Hide Retired			
characters002	rough	approved	mark				

Search

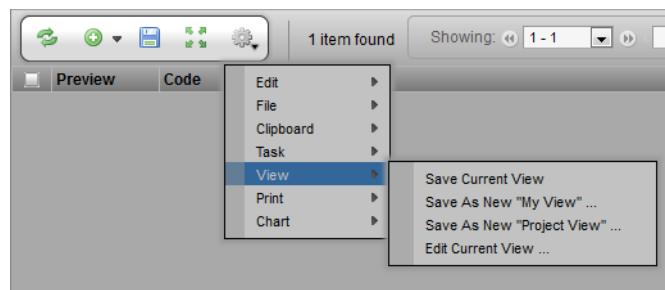
The Search Tool is used as a filter to only display items which match a certain criteria. This allows the results in the view to be narrowed down. When a view is saved, the search criteria is saved with the view which causes the view to become a live report as each time the view is loaded the search filter will be applied to the live data.

For example, if a search filter is created which shows only items which have a child task with the status "Review", the view will provide a report of all items which need to be reviewed. When the status of these tasks are changed, the items will be filtered out and no longer appear in the view.

The screenshot shows the TACTIC software interface. At the top, there is a search bar with a magnifying glass icon and a status indicator '2 filter/s'. Below it is a 'Search Criteria' dialog box. The dialog has sections for 'Search Criteria', 'Quick Search' (with a text input field and a help icon), and 'Filter' (with two dropdowns: 'Project Code' set to '\$PROJECT' and 'Status' set to 'Review'). There are also sections for 'Parent' and 'Children'. At the bottom of the dialog are 'Search' and 'Clear' buttons. Below the dialog is a table view titled '10 items found'. The table has columns: Parent, Process, Status, Assigned, Prior, Notes art, Snapshots art, Work Hours, and a date range from Dec 2010 to Mar 2011. The table lists items assigned to 'brad', 'jimmy', and 'mark' with various details like 'colour', 'rough', 'Review', and dates like 'Jan 28' and 'Feb 01'.

Saving the View

After the display of the view have been configured, to save the view, go to the **gear menu** under **View**. The options are described below.



- **Save Current View** - Saves over the existing view. (Available only to users with access to save project views. Otherwise, it will save a new My View)
- **Save As New "My View"** - Saves the view to the user's personal My Views. (Available only to users who can create views)
- **Save As New "Project View"** - Save a new project view which will be available to all users. (Available only to users with the appropriate access.)
- **Edit Current View** - Opens up a pop-up window to edit the table and the columns.

5 Searching

5.1 Search Interface

The screenshot shows a search results grid with columns: Description, Status, and Milestone. There are 44 items found. A search criteria dialog is overlaid on the interface. The search criteria include:

- Search Criteria:** Shows 'Showing: 1 - 44' and '2 filter/s'.
- Search:** Buttons for 'Search' and 'Clear'.
- Match all**: A dropdown set to 'on the following'.
- Keyword Search:** A text input field containing 'Revise'.
- Filter:**
 - Project Code:** Set to '\$PROJECT'.
 - Status:** Set to 'is not Approved'.
 - Parent**
 - Children**
- Search** and **Clear** buttons.

Description

The TACTIC Search Box is used to build filters to refine the results in the view. A variety of search filters can be constructed, ranging from simple column searches to large complex compound searches. The creation of search filters closely resembles that of creating mail filters in a mail application. Each search filter plays a role in the outcome of the final results. The Search Box is flexible enough to handle any kind of search.

Keyword Search

Open the Search Criteria by clicking the button on the tool shelf.

The screenshot shows a search results grid with columns: Preview, Category, and Keywords. There are 3 items found. A search criteria dialog is overlaid on the interface. The search criteria include:

- Search Criteria:** Shows 'Showing: 1 - 3' and '1 filter/s'.
- Search:** Buttons for 'Search' and 'Clear'.
- Match all**: A dropdown set to 'on the following'.
- Keyword Search:** A text input field containing 'car'.
- Custom**
- Filter**
- Parent**
- Children**
- Search** and **Clear** buttons.

The keyword search section allows for creation of a search filter to search on the words found in the column named **Keywords**. These keywords must be manually inputted and updated.

Filter

The screenshot shows the 'Search Criteria' dialog. At the top, there are 'Search' and 'Clear' buttons, and a dropdown menu set to 'Match all' with the option 'on the following'. Below this is a 'Filter' section containing two entries:

- Process:** Set to 'Animation'.
- Status:** Set to 'not Complete'.

At the bottom of the dialog are 'Search' and 'Clear' buttons.

The Filter section allows for the creation and activation of search filters. Each search filter operates on one attribute on that sType. These searches use standard text search logic and supports TACTIC's expression language.

The **Clear** button clears out all the data in all the search filters: resets the drop down selection boxes and clears out the input search criteria box.

Parent Search

The screenshot shows the 'create_schema' interface. On the left, there is a tree view with 'asset_category' at the top, followed by 'asset'. A search bar at the top right contains the text '/Project_view/asset_tracking'. Below the search bar is a table titled 'Keywords:' with three items found:

	Preview	Category	Title
<input type="checkbox"/>		video	Nuclear Explosion
<input type="checkbox"/>		video	Car Chase
<input type="checkbox"/>	NO PREVIEW	video	Scene 22

The screenshot shows the 'Search Criteria' dialog. At the top, there are 'Search' and 'Clear' buttons, and a dropdown menu set to 'Match all' with the option 'on the following'. Below this is a 'Filter' section containing one entry:

- asset_category:** Set to 'video'.

At the bottom of the dialog are 'Search' and 'Clear' buttons.

A search can be based on any property of a parent search type. For example, if asset_category is the parent type then a search can be made based on the properties of the parent. For example, a filter can be created on the parent (asset_category) where the code is "video".

Children Search

The screenshot shows the 'Search Criteria' dialog with the 'Children' section expanded. A search filter is defined with the following criteria: 'task' (selected), 'Priority' (selected), 'is greater than' (selected), and the value '3'. There are also '+' and '-' buttons for adding or removing filters.

The Children search filter allows refining based on data in columns in the children. For example, a filter can be created to find all tasks where the priority is greater than 3.

Matching and Compound Searches

Click the [+] icon beside a search parameter to add additional search definitions.

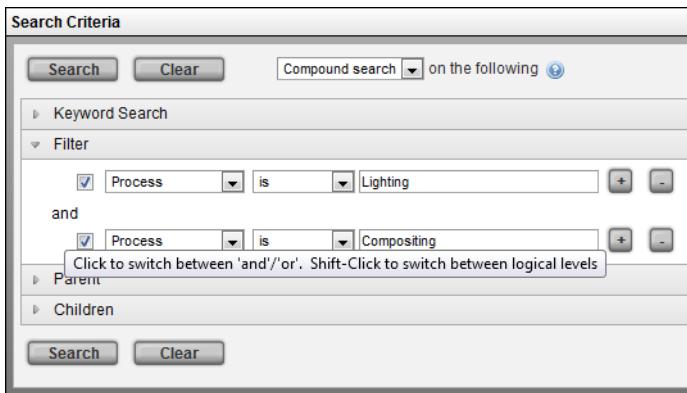
The screenshot shows the 'Search Criteria' dialog with the 'Filter' section expanded. Three separate filter definitions are present: one for 'Project Code' set to '\$PROJECT', and two for 'Attribute' with dropdowns for 'is' and 'value'.

The drop down selection box at the top of the search box can be used to set up the search to be match open (matching **any** of the definitions) or match specific (matching **all** of the definitions). The default match option is "Match all".

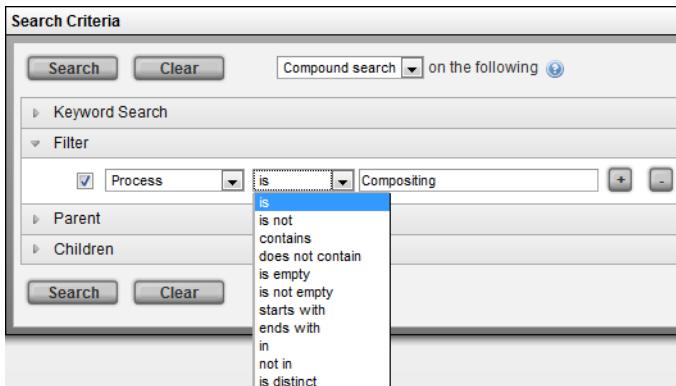
The screenshot shows the 'Search Criteria' dialog with the 'Filter' section expanded. It displays two search filters: 'Process' is 'Lighting' and 'Process' is 'Compositing'. Between these filters is the word 'and', which is highlighted with a blue border. A tooltip above the word says: 'Click to switch between 'and'/'or'. Shift-Click to switch between logical levels.'

Compound Search gives the capability to set an **AND** or an **OR** option for filters. The default compound search option is "AND".

To switch the compound search option, select "Compound Search" from the drop down selection box at the top, add a new search filter, click on the word "and" that appears between the search filters to toggle it to "or".



Operators



is	Finds an exact match. eg. Process "is" Compositing
is not	Finds all the results that do not match exactly. eg. Process "is not" Compositing
contains	Does a partial match. eg. Process "contains" ompost
does not contain	Finds all the results that do not match a partial match.
is empty	Match the empty field.
starts with	Match on the beginning part of the string. eg. Process "starts with" Comp
ends with	Match the ending part of the string. eg. Process "ends with" ing
in	Match any of the strings delimited by "
". eg Process "in" Compositing	Lighting
not in	Find all the results that do not match the strings delimited by "
".	is distinct

The "In" Operator

It is possible to search for items in a list using a simple text string with a "|" operator. For example, search for either "TM_001" or "TM_002" or "TM_003":

```
Sequence code [in] "TM_001|TM_002|TM_003"
```

Sequence	Shot
TM_001	TM_001_001
TM_002	TM_002_001
TM_002	TM_002_002
TM_003	TM_003_001
TM_003	TM_003_002

Search Criteria

Showing: 1 - 8 | 1 filter/s

Search Criteria: Match all on the following

- Keyword Search
- Custom
- Filter
 - Sequence Code in TM_001|TM_002|TM_003
- Parent
- Children

Search Clear

The vertical bar (a logical "or") is a delimiter that specifies that the search should look for any item with the code "TM_001" or "TM_002" or "TM_003".

To switch the compound search option, select "Compound Search" from the drop down selection box at the top, add a new search filter, click on the word "and" that appears between the search filters to toggle it to "or".

The "Is Distinct" Operator

This operator filters out items with the same column value. ie. The results will only contain items that have a distinct entry in that column.

Sequence code [is distinct]

Preview	Sequence	Shot
	TR_001	20DI
	TM_001	TM_001_001
	TM_002	TM_002_002
	TM_003	TM_003_005
	TM_004	TM_004_002
	TM_005	TM_005_001

Search Criteria

Showing: 1 - 18 | 1 filter/s

Search Criteria: Match all on the following

- Keyword Search
- Custom
- Filter
 - Sequence Code is distinct
- Parent
- Children

Search Clear

note: there is no need to put any criteria in the box when using the operator **is distinct**

Saving Searches

When saving a view as either "Project View" or "My View", the search filters are also saved with the view. Once the view is saved, the next time the view is opened, the search filters will be applied. This makes saving a view essentially like generating a report with a predefined set of criteria.

5.2 Expression Searching

Expression values

The search criteria input for search filters can be TACTIC expressions. To signify to TACTIC that a search criteria is an expression, wrap the expression in curly braces {}. This signifies to the search engine to evaluate the value as an expression before sending it to the search.

Having the search criteria be a TACTIC expression allows for many uses of predefined variables in the expression language.

For example, the following will search for all tasks for this week based on a Sunday to Sunday work week.

```
timestamp "is after" "{$PREV_SUNDAY}"
timestamp "is before" "{$NEXT_SUNDAY}"
```

Here is the TACTIC expression to find all of the checkins that have occurred this month:

```
timestamp "is after" "{$THIS_MONTH}"
```

Here is the TACTIC expression to find all the tasks for the current project:

```
project_code "is" "{$PROJECT}"
```

Note: the curly braces {} around these predefined variables are not needed in the expression mode described below.

Full Expression searches

Full expressions searches are an advanced way of searching for results. For each column, there is an "expression" option. This option provides the ability to use the full power of the expression language within a search that are beyond the capabilities of the search user interface.

The full expression executes an evaluation on this expression then relates the results to the main search. Careful consideration must be taken to refine an expressions so that is as efficient as possible.

For example, search for all of the assets that have model tasks:

```
@SOBJECT(sthpw/task['context','model'])
```

This search will first execute a search of all of the tasks that have model. Note that this does a search on all of the modelling tasks. With a large number of tasks, this operation can be heavy. Care must be taken to minimize the results of the expression. One way to make the search more efficient is limit the search to just that of the current project:

```
@SOBJECT(sthpw/task['project_code', $PROJECT] ['context','model'])
```

The expressions can be combined with other filters in any combination so that very complex searches can be achieved.

For example, another more complex search is to find all items with a modelling task assigned to someone in the "toronto" location (assuming there is a custom property on the login table), we can use:

```
@SOBJECT(sthpw/login['location','toronto'].sthpw/task['project_code', $PROJECT] ['context', '←
model'])
```

This works because tasks (sthpw/task) and logins (sthpw/login) are connected through each other through the "assigned" column in the task table and "login" column in the login table.

There are 4 modes available to the expression search: "have", "do not have", "match", "do not match". These four searches can be applied to the Shot List page.

1. Results "have" "@SOBJECT(sthpw/task)" will show all items that have tasks in them. This mode must return items in the expression.
2. Results "do not have" "@SOBJECT(sthpw/task[context,model])" will show all items that do not have modelling tasks. This mode must return items in the expression.
3. Results "match" "@COUNT(sthpw/snapshot[context,model]) > 3" will show all items that have more than 3 snapshots. This mode must return True or False in the expression.
4. Results "do not match" "@COUNT(sthpw/snapshot[context,model]) == 0" will show all items that do not match the condition where model snapshot count is 0. In other words, it means there is at least 1 or more model check-in for the shot. This mode must return True or False in the expression.

6 Tasks and Schedules

6.1 Creating Tasks

The screenshot shows two windows side-by-side. The left window displays an asset named 'asset001' with the title 'Nuclear Explosion'. It includes a preview image of a bright explosion, the category 'video', and keywords like 'explosion, fire, nuclear, bomb'. The right window shows a list of tasks for this asset, categorized by status: Review, Pending, Ready, and Waiting. Each task is associated with a process name (design, rough, final, delivery) and a due date (Jul 29, Jul 26, Jul 26, and Jul 29 respectively). The tasks are also color-coded by status.

Insert/Edit Tasks

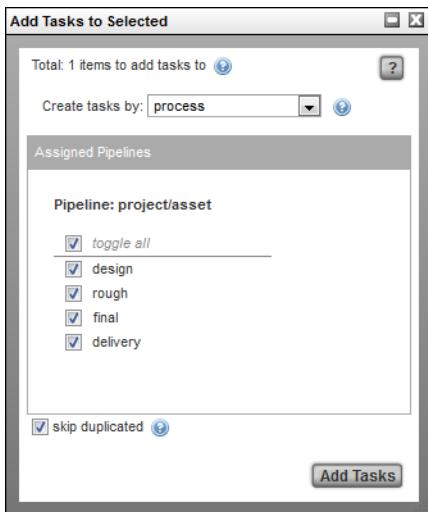
There is more than one way to create new tasks. The following describes explains each way.

Task Menu

Select the item to add tasks to. Then, go to the Gear menu for the view and select **Tasks → Add Tasks To Selected**.

This screenshot shows the 'Gear' menu open on the left side of the interface. The 'Tasks' option is selected, which has a submenu with two choices: 'Add Tasks to Selected' and 'Add Tasks to Matched'. The main menu also lists other options like Edit, File, Clipboard, View, Print, Chart, and Notes.

Check mark the processes to add the task to and then hit **Add Tasks**.

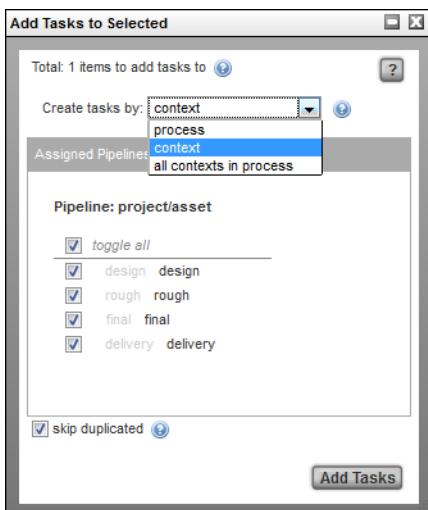


The **skip duplicated** option skips adding a task that has already been created for that process e.g. if only a task for design has already been created.

Notice the new tasks added to the Task Pipeline column:

Task Pipeline			
design 07/29 - 07/29	rough 08/01 - 08/02	final 07/26 - 07/30	delivery 08/04 - 08/04
Review beth	Waiting mark	Waiting beth	Waiting bobby
design 07/18 - 07/23	rough 08/01 - 08/02	final 08/10 - 08/13	delivery 08/04 - 08/04
Pending beth	Approved brad	Approved brad	Approved bobby
design 07/28 - 07/28	rough 08/03 - 08/04	final 08/02 - 08/05	delivery 08/04 - 08/04
Review brad	Approved beth	Review beth	Waiting bobby

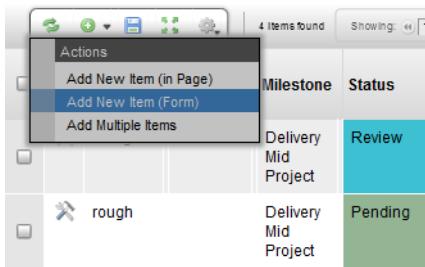
Another way to create a task is to create a task by **context**. This is provided in the drop down selection menu.



Create task by: Process	Displays all the processes to select from, to create a task for.
Create task by: Context	Displays all the contexts to select from, to create a task for.
Create task by: All Contexts in Process	Creates all the contexts defined in the pipeline, but only displays the processes to select from, to create a task for.

Task Edit Column

The Task edit column can be used to insert tasks one at a time for a particular item.



Task Status Column

Once an item is created which has a pipeline, the widget will show a green insert button (+). This will load the task creation GUI to create tasks for the item.

	Preview	Task	Code	Asset Type	Referenced	Completion	Task Pipeline
<input type="checkbox"/>	NO PREVIEW		ASSET00007	character		No tasks	No tasks. Click to Add
<input type="checkbox"/>			test_char_001	character		34.3%	bid 01/11 - 01/26 review jimmy

Task Properties

Add Single Item

Add new item to User Tasks	
Created for	asset001
Process	rough
Description	Car Chase
Milestone	Project Start
Assigned	brad
Supervisor	cindy
Bid start date	2012-01-24
Bid end date	2012-01-26
Bid duration	2
Priority	4 - Very Important
Pipeline code	project/status_default
Status	Assignment
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Each Task can have the following attributes.

Process	The currently selected process. Use the menu to select a different process to perform on the current parent asset.
Description	A description to identify the task.
Milestone	Assignment to a milestone item that represents a specific milestone in the project.
Status	The status of the currently selected task pipeline.
Assigned	The user assigned to complete the task.
Supervisor	The user assigned to supervise the task.
Priority	The priority level of the task.
Bid start date	Proposed date to start the assigned task. Drag the date in the calendar to set.
Bid end date	Proposed date to complete the assigned task. Drag the date in the calendar to set
Bid Duration	Proposed amount of hours to complete the assigned task.

7 Notes and Communication

7.1 Notes Widget

Introduction

The Notes Widget provides the ability to add a note directly to an item in the view. The notes are tracked in chronological order and are also grouped by process if entered against tasks. Other conveniences provided in this widget is the ability attach files and to CC/BCC extra email addresses when you submit the note.

Adding a Note

If the Notes widget is not in the view, it can be added through the Column Manager.

To add a note, go to the Notes column and click on the plus sign in the top right corner.

The screenshot shows a table view with columns: Preview, Asset Code, Title, and Notes. The 'Preview' column contains a thumbnail image of a bright explosion. The 'Asset Code' column shows 'asset001'. The 'Title' column shows 'Nuclear Explosion'. The 'Notes' column displays two entries under the 'design' process:

- design (2)**
 - Aug 10 - 22:35 - [cindy]** - Please work on the particle effects.
 - cindy**
Cindy Client
dan@southpawtech.com
 - design**
Please work on the particle effects.
 - Attachments: 0
 - Aug 08 - 19:50 - [beth]** - There was some trouble with this please have a l ...
 - beth**
Beth Content Creator
dan@southpawtech.com
 - design**
There was some trouble with this please have a look.
 - Attachments: 0
- final (5)**
 - For Process:** final
 - Note:**
I've fixed it. Please validate.
 - Attach File(s)** **Submit**

At the bottom of the Notes column, there is a section for **Mail Options** with fields for **Cc:** and **Bcc:**.

The "For process:" drop down allows you to select the pipeline process to add the note to. If there is no pipeline for the item, then a default process will be used for the note.

The Submit button will save the note to the item.

Additional Note Options

To attach a file, click on the Attach File(s) button. The file browser will open to prompt to select a file.

Additional fields to input Cc or Bcc email addresses can be found at the bottom, under Mail Options.

Note

If Notification Triggers have been set up in the project, emails will automatically be sent to the appropriate users when notes are added. Adding a CC email address to a note simply sends the note to the email addresses regardless of Notification Triggers.

Multiple Notes

When multiple notes are saved to an item, the interface will look like the following (notice that the notes for the item are conveniently categorized by process):

Collapsed

Preview	Asset Code	Title	Notes
	asset001	Nuclear Explosion	<ul style="list-style-type: none"> design (2) <ul style="list-style-type: none"> Aug 10 - 22:35 - [cindy] - Please work on the particle effects. Aug 08 - 19:50 - [beth] - There was some trouble with this please have a l ... final (5) <ul style="list-style-type: none"> Jan 13 - 20:26 - [admin] - test private note Jan 13 - 20:25 - [admin] - Almost there. Aug 10 - 22:35 - [cindy] - I like it Aug 10 - 01:35 - [beth] - Looks good Aug 08 - 19:51 - [beth] - I have some issues with this checkin rough (1) <ul style="list-style-type: none"> Aug 08 - 17:51 - [admin] - Rough looks good.

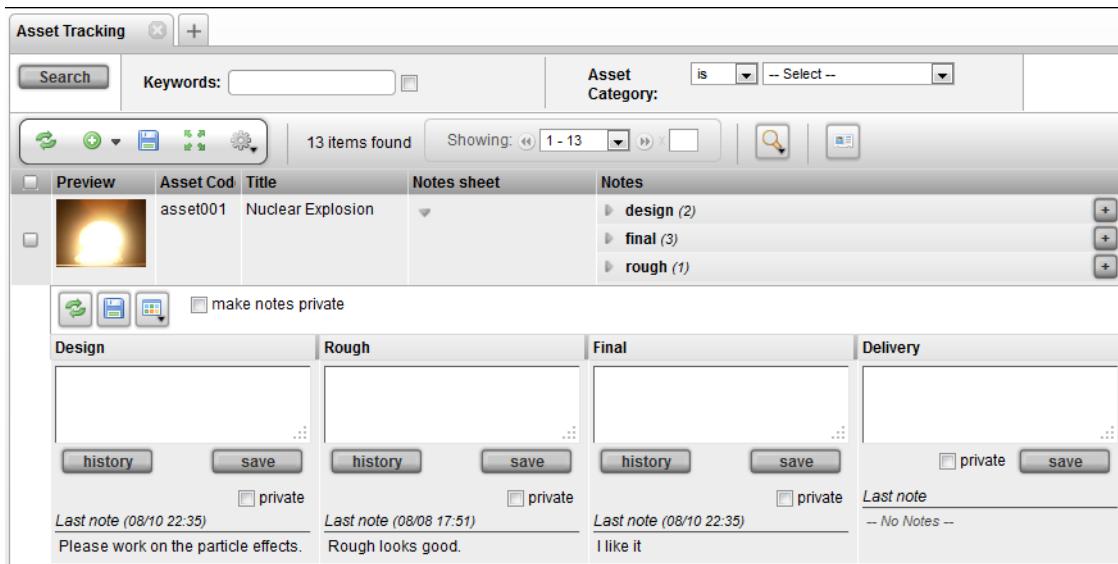
Expanded

Preview	Asset Code	Title	Notes
	asset001	Nuclear Explosion	<ul style="list-style-type: none"> design (2) <ul style="list-style-type: none">  cindy Cindy Client dan@southpawtech.com  beth Beth Content Creator dan@southpawtech.com final (5) <ul style="list-style-type: none">  admin Admin dan@southpawtech.com  admin Admin dan@southpawtech.com

7.2 Note Sheet

Introduction

The Note Sheet widget provides a convenient layout for typing in notes for different processes in one concise user interface. The Note Sheet is also built to provide rapid interface for entering notes. For example, the Note Sheet helps in daily review sessions where the ability to enter notes in rapid succession is necessary.



Description

Notes can be entered for any item. When the Note Sheet widget is added as a column, by default, the pipeline processes are used as the processes for note entry. The processes for the example item shown in the screen shot above include design, final, rough and delivery. The Notes Sheet widget allows entering of many notes in different processes and different parents at the same time. They can be saved either individually or altogether. The private check box option make a note private.

Usage

When the Note Sheet is expanded, it may require that the processes be selected to display. At the top of the widget is a button which allows you to load a process selection pop-up which exposes the desired processes.



After you are finished with note entry, you will see two buttons appearing on the top right corner. Clicking on "save" will save all of the notes. If you have the Note Sheet Widget opened for vehicle001, vehicle002, and vehicle003, clicking on the standard save all will save all new notes in the view. To save one note at a time, there is also an individual "save" button for each process.

Clicking on the history button pops up a window which displays all the note entries under this particular context.

Private Notes

The private check box turns a note access to private if checked. The private option is a built in access rule which can deny a group of users from being able to see notes flagged as *private*.

Note

Note - When using the Note Sheet on items such as Tasks, Notes and Snapshots, the default assumption will be to add a note to the parent item for the particular process. For example, if adding a note to the "design" task, a note will be added with the same process.

8 File Management

8.1 General Check-in

Introduction

The General Check-in widget provides interface to do many of the most common kinds of check-ins used in TACTIC. It is a highly configurable widget that allows a project to have customized check-ins for any part of the content creation process.

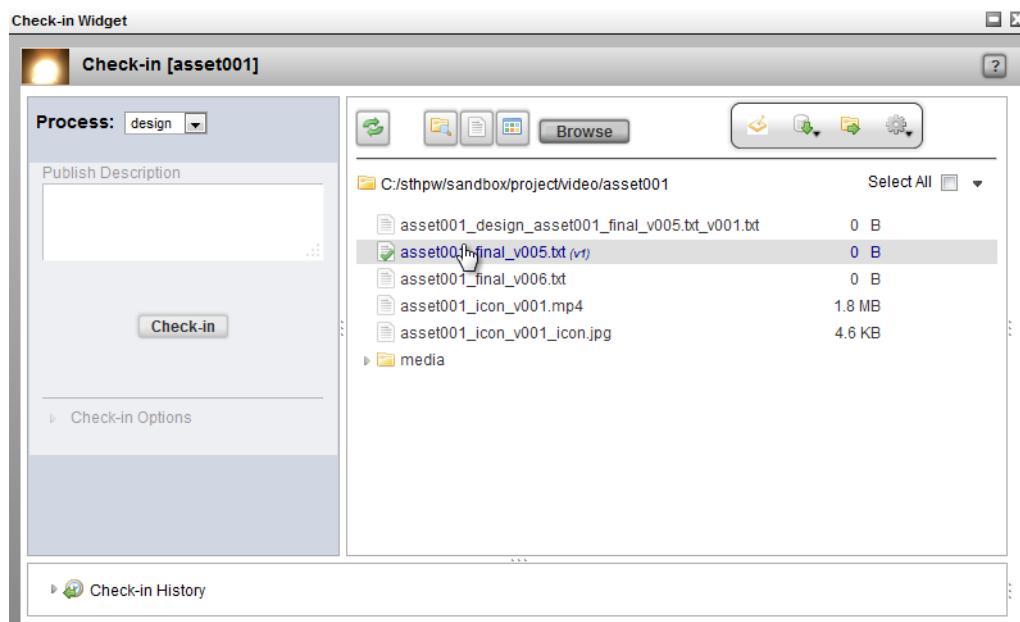
Check-ins are the ability to in TACTIC to take files that have been created and submitting them to TACTIC's central repository to be organized, stored and versioned. TACTIC has a comprehensive ability to track files and their histories with the added benefit of enforcing naming conventions.

The general check-in widget can handle:

- **Single Files** - An image, video, document, etc
- **Sequences** - Commonly image sequences
- **Directories** - Full directories including files and sub folders
- **Complex packages** - Handling of a project source including project and source medial files.

Interface

The interface below shows a standard example of the General Check-in widget.



Tool bar

The tool bar contains a number of use functions.



Refresh	Refreshes the whole widget and will also rescan the sandbox for any changes.
Browse to working folder	Allows the user to browse to a new location for the working area.
Set to My Documents	Sets the working area to the My Documents directory
Set to Desktop	Sets the working area to the Desktop directory.
Browse	Allows the user to select file(s) or directories to check in directly.
Set Sandbox	Set the sandbox automatically based on the naming conventions. This makes setting up a workspace very easy and organized.
Check-out tools	Tools to assist in Checking out files. <i>Described in the section "Check-out" below</i>
Explore Sandbox	Opens up the folder directly on the users computer. This allows for the quick copying and pasting files into your sandbox workspace.

Process Select

Check-ins for an item are always classified by a processes. TACTIC organizes all of the check-ins with various processes that are defined for that item. The current process can be selected by the process selection drop-down. This often times corresponds to a task assigned to that user for that process.



This will only show up if a pipeline has been defined for the item. If no pipeline has been defined, then a default process called "publish" is used.

Often this selection will be locked because it is associated with an assigned task. A user will often work from a task also associated within a particular process and then choose to check in files based on content created from this task.

Sandbox Area

<input type="checkbox"/>	C:/sthpw/sandbox/project/video/asset001	Select All <input type="checkbox"/>
<input type="checkbox"/>	asset001_design_asset001_final_v005.txt_v001.txt	0 B
<input checked="" type="checkbox"/>	asset001_final_v005.txt (v1)	0 B
<input type="checkbox"/>	asset001_final_v006.txt	0 B
<input type="checkbox"/>	asset001_icon_v001.mp4	1.8 MB
<input type="checkbox"/>	asset001_icon_v001_icon.jpg	4.6 KB
<input type="checkbox"/>	media	

On first load of a new task (process) the check-in widget will assist the user in setting up a work area.

The user experience protocol will determine how the user leverages the features in the sandbox. The recommended approach is to allow TACTIC to create a sandbox location for the current process. This method is beneficial because it helps the user organize work-up files before they are even checked into the server. This approach is recommended because it creates an easy accessible and well organized file system on the users computer. It is however, possible to check in files from another location on the file server using the browse buttons in the tool bar.

Use the above buttons to browse for files or folders to be checked in.

OR work in the Sandbox Folder for process [design]
C:/sthpw/sandbox/project/3d/asset003

The sandbox folder is a work folder allocated for this process. It does not yet exist. If you wish to work in the sandbox folder, press the "Create" button.

Create >>

During the content creation process, users will create files and save them under this sandbox folder. All files associated with this item should be stored here. It should be noted that this sandbox work area is not strictly enforced and it is easily possible to navigate to other folders to check in files to a given asset. However, it is considered good practice to have user's create files in a well defined location in order to more easily manage overall disk space usage.

Any files created in the sandbox area will be displayed in this section. If any new files have been created and are not reflected in the interface, then a simple refresh should make these new files appear.

Files that have been checked-in will show a small indicator in the icon to the right and will be colored in blue. The small indicator will either be a green check mark, which indicates that the file in the sandbox is identical to the checked in file. If the indicator is a red exclamation mark, this means that the file has been changed and is different from the checked in file.

To select all files in the sandbox area check off the "Select/Deselect All" check-box on the top right hand side.

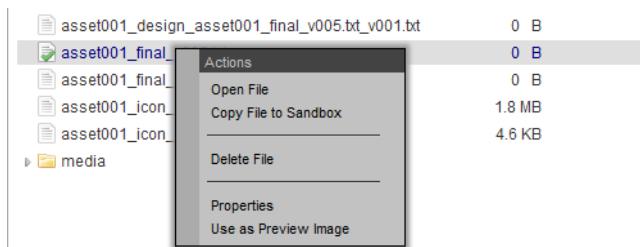
Select/Deselect All:

To quickly select all changed files, click on the arrow to open up extra menus and select "Select Changed Files".



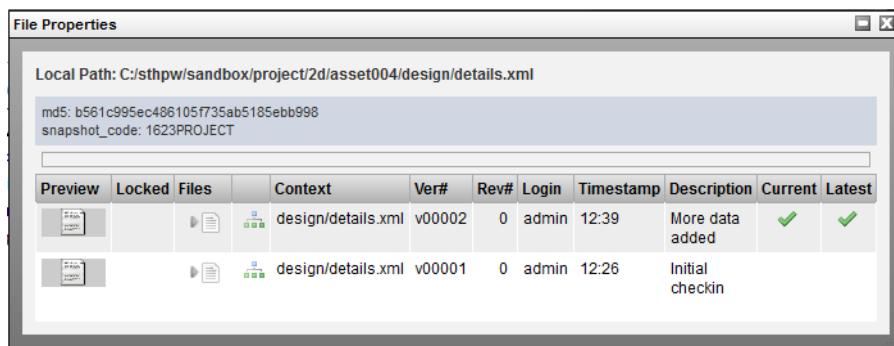
All files that have been changed since the last check-in will be selected. TACTIC will remember the last subcontext checked in for this file so. This allows changed files to be easily rechecked in when changes have been made.

Clicking on the right mouse button of any file will open up a context menu.



The following actions are available:

Open File	Open the file using the application as set up by the client operating system.
Delete File	Permanently delete the file from the sandbox area (and on the computer).
Properties	Open up a pop-up showing the properties of this file, including all past check in information. An example is shown below:



Check-In

When any files are ready to be checked in, they can be selected. The row will highlight for all selected files, and either a selection list, or a text box will appear on the right side. Since many files can be checked into the same process in an asset, this provides a sub-category to organize checked in assets (this is known as the subcontext of the context of a check-in). By default, this should read (auto) which means that it will be automatically filled in.

When all of the files that need to be checked in have been selected, the check in widget will be enabled.

It's good practice to add a note in the Description field while performing a check-in. This is important so all project users understand why a particular check-in was made, and where it's located.

When the "Check-in" button is pressed, all of the selected files will be transferred to TACTIC's repository. There are a number of ways that the files can be configured to transfer files. When TACTIC checks in a file, it will move them to the correct folder, version and rename them to the correct file name as specified for the naming conventions.

Check-in Subcontext types

When checking in, a drop-down is available beside each file or directory. This functionality allows control over how each check-in will be handled. This type of control is called **subcontext**. This can be looked at as a sub process for the sub-directories included in a check-in.

Auto

The "Auto" mode is used if it's desired to keep file names the same as they are before the check in . This work-flow is beneficial if one wishes to keep file names, or work in a situation such at subversion where files are constantly overwritten and versions are handled automatically in the background.

Sandbox	SANDBOX/project/assets/asset001/design/original_file.jpg
Check-in	[multiblock cell omitted]
Check-out	SANDBOX/projct/assets/asset001/design/original_file.jpg

Main

If only one file/directory/sequence is going to be checked-in, it will also be re-named correctly by the naming conventions. This is often the case when files are delivered to another department or the client.

Sandbox	SANDBOX/projct/assets/asset001/design/original_file.jpg
Check-in	SERVER/project/assets/asset001/design/asset001_design_v001.jpg
Check-out	SANDBOX/projct/assets/asset001/design/asset001_design_v001.jpg

Text

If more than one file/directory will be checked in and strict control is required for each item, the subcontext will be different each time a check-in happens. This often applies when different variations of a check-in are required. For example a blue and a red version of a file might be needed for a particular check-in, so the user would type this in for each file:

Sandbox	[multiblock cell omitted]
Check-in	[multiblock cell omitted]
Check-out	[multiblock cell omitted]

List

If more than one file/directory will be checked in and strict control is required for each item, the subcontexts are the same every time a check-in occurs. This often applies when there are multiple sub-directories that need to be worked on for a task. For example, a preview, project file and a directory of media files would be organized by selecting preview, project or media in the drop-down.

Sandbox	[multiblock cell omitted]
Check-in	[multiblock cell omitted]
Check-out	[multiblock cell omitted]

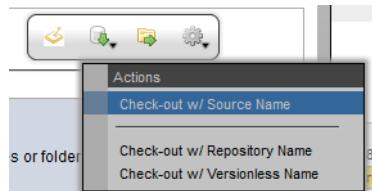
Note

Often these options are predetermined by the pipeline configuration set up by the TACTIC administrator. Other combinations file/directory naming and file version control can also be configured through naming conventions.

Check-out

When working on a particular task that is part of a pipeline, files may need to be checked out or "downloaded" to be worked on or revised. TACTIC assists with this process and allows easy access to retrieving the right files/directories from the TACTIC server.

Check-out Options



A specific version can be checked out through the Check-out button in the History area. There are also more advanced options available in the Check-out options menu.

Check-out w/ Source Name	Check out the latest version of different contexts based on the original file name that was checked in regardless of naming conventions.
Check-out w/ Repository Name	Check out the latest version of different contexts using the repository names as seen in the TACTIC repo.
Check-out w/ Versionless Name	Versionless check-ins only - Check out the latest versionless of different contexts using the the versionless convention as seen in the TACTIC repo.

History

This area shows the check-in history. By default, this information is collapsed but can be accessed by clicking on Check-in history.

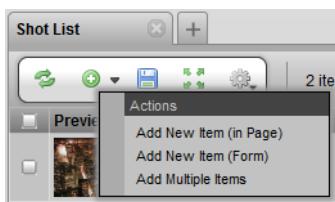
Preview	Loc	Files	Che	Context	Ver#	Rev	Login	Times	Description	Cur	Note
				design	v00003	0	admin	15:16	Refined the outer edges		
				design	v00002	0	admin	15:12	Changed the color from blue to green		
				design	v00001	0	admin	14:24	Initial checkin - rough work		

Preview	Locked	Files	Checkout	Context	Ver#	Rev#	Loc
				design	v1	0	ad

8.2 Insert

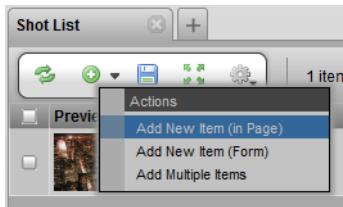
TACTIC provides many ways to insert new items. For the beginner, insertion of a new item can done through a form that guides you through each input field. For the more advanced used, insertion of an item can be done directly inline in the view. The various methods to insert items are described below.

The insert button is on the tool shelf. It is the button with the green circle, with a white plus sign inscribed. Clicking on the button bring up a form to guide you through each input field. The down arrow triangle next to the button allow you to do the insert in different ways.



Each option of the Insert menu is described in detail below.

This insert menu option adds a new row directly into the page that you are viewing. The advanced user would be more comfortable using this method.



Once in this insert mode, refer to the column headers as a guideline as to the type of data to enter into the input field.

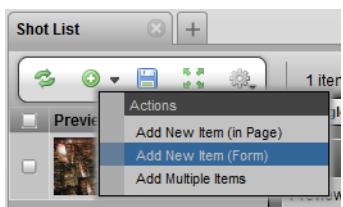
Shot List						
	Preview	Code	Sequence code	Description	Shot status	Pipeline code
NEW		S01_001	S01	The first Sequence	IP	shot

All input fields are optional. If no data is entered into an input field where one would be required, such as Code, an appropriate default will be automatically generated.

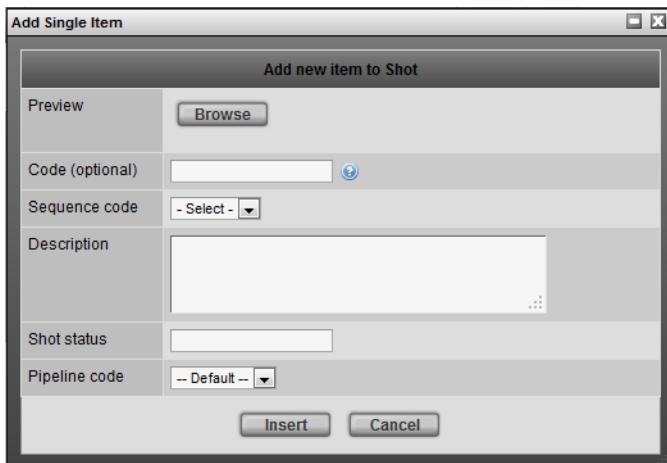
note: Hitting the green plus sign will insert multiple rows into the view. This facilitates inputting data for multiple new items quickly.

Shot List						
	Preview	Code	Sequence code	Description	Shot status	Pipeline code
NEW						
NEW						
NEW		S01_001	S01	The first Sequence	IP	shot

This menu option open a window which guides you through the data to enter for each input field. This method of inserting an item is a good place to start for the beginner.

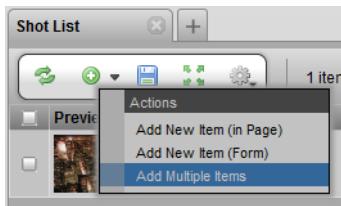


Once the insertion form pops up, the description on the left hand side can be used as a guide as to the type of data to enter into the input field.

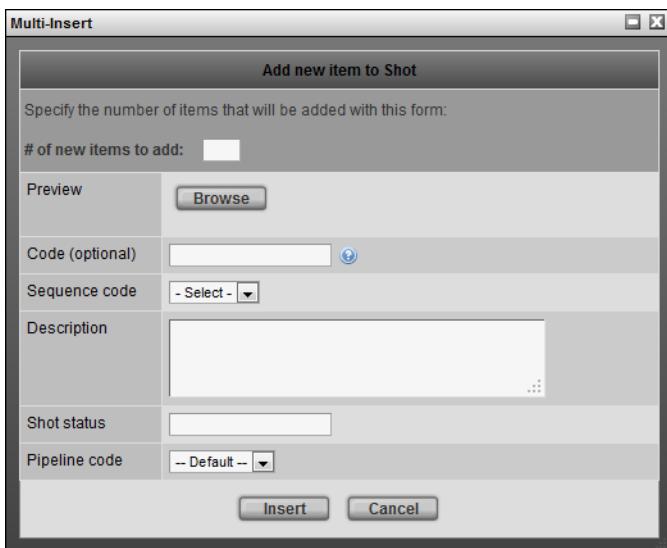


All input fields are optional. If no data is entered into an input field where one would be required, such as Code, an appropriate default will be automatically generated.

This menu option opens Multi-Insert the pop window.



The Multi-Insert pop-up window, allows you to add the same item multiple times.



The most important value that must be entered is one for the Multiplier field.

The number entered into the Multiplier box determines how many items that will be created.

Sequence code will determine which sequence the items will be placed under.

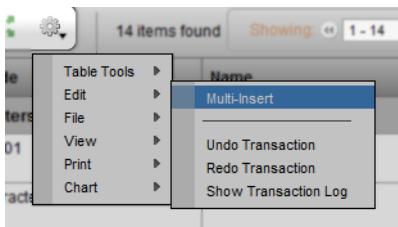
The Code value will be incremented by the value that is entered into the Multiplier.

**Note - The value for Code must start with a letter.*

All the other values are optional.

8.3 Multi-insert

The Multi-insert option is located within the table views gear menu, in the edit option.



The idea of a multi-insert is to be able to duplicate SObjects. Here is an example of a multi-insert view.

A screenshot of a 'Multi-Insert' dialog box. The title bar says 'Multi-Insert' and the sub-title is 'Add new item to Shot'. There is a 'Multiplier: x' input field with a value of 1. The form contains several input fields: 'Preview' (with a 'Browse' button), 'Code' (text input), 'Pipeline code' (dropdown menu set to 'again'), 'Sequence code' (dropdown menu set to '- Select -'), 'Frame count' (text input), 'Job code' (dropdown menu set to '- Select -'), 'Play shot in source' (text input), 'File usage mb' (text input), 'Total snapshots' (text input), and 'Client status' (dropdown menu set to 'waiting'). At the bottom are 'Insert' and 'Cancel' buttons.

The most important values that must be entered are the Multiplier, and the Code.

The number entered into the Multiplier box determines how many SObjects that will be created.

Sequence code will determine which sequence the SObjects will be placed under.

The Code value will be incremented by the value that is entered into the Multiplier.

**Note - The value of the Code must start with a letter.*

All the other values are optional.

9 Time tracking

9.1 Tracking User Work Hours

The TACTIC system has built-in work hour tracking, which can be tracked per task or work hours can be entered manually.

By default, hours can only be submitted to a task by the user that task is assigned to. For example, if an asset has a pipeline process called "texturing" and this process is assigned to the user Albert, then only Albert can log work hours for this task.

Users log work hours in a task view with the "Work Hours" column.

	Preview	Created	Process	Description	Status	Priority	Work on Task	Jan	Sun	Mon	Tue	Wed	Thu	Fri	Sat
								08	2.0	3.0					5.0
<input type="checkbox"/>		asset001	design		Review	0		09							
<input type="checkbox"/>		asset001	final		Waiting	5		10							10.0
<input type="checkbox"/>		asset002	design	Design Task for asset002	Pending	5		11							6.0
<input type="checkbox"/>		asset003	rough		Approved	4		12							2.0
								13							5.0
								14							8.0

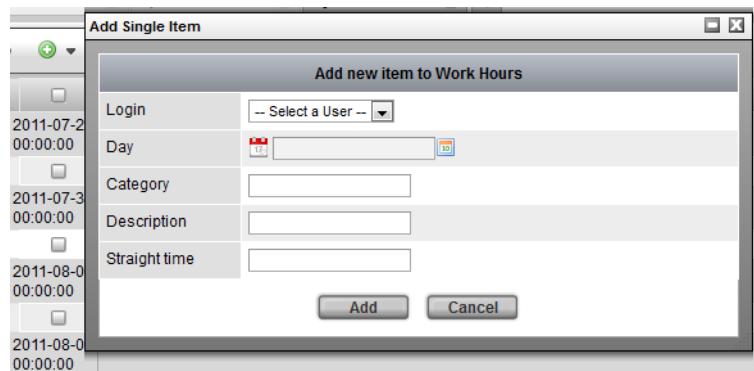
Hours can be logged and edited per day, per task.

To view the logged hours, go to the **Work Hours** view. (This view shows the hours for the user currently logged in.)

	<input type="checkbox"/>	Parent	Description	Day	Login	Straight time
	<input type="checkbox"/>	2012-01-09 00:00:00				7.00
	<input type="checkbox"/>	asset001		Jan 09, 12	beth	2.00
	<input type="checkbox"/>	asset001		Jan 09, 12	beth	5.00
	<input type="checkbox"/>	2012-01-10 00:00:00				8.00
	<input type="checkbox"/>	asset001		Jan 10, 12	beth	3.00

In the Work Hours view, you will see an item per time entry with totals per day and per week based on hours logged on all assets.

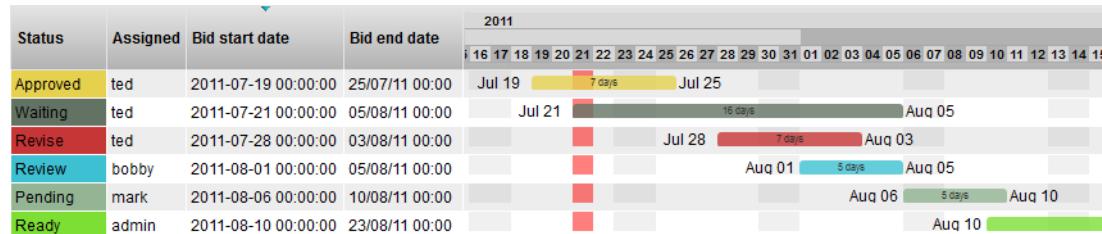
To manually track work hours for other events (for example, daily meetings), click the insert button and fill in the options in the pop-up window:



Options

Login	The login (user) who the hours are for.
Day	The day the hours are for.
Category	The category of work the hours represent.
Description	A description of what the time was spent on.
Straight Time	The amount of hours for the entry.

9.2 Gantt Widget



Description

The Gantt Widget displays a horizontal bar graph representing the item's start date, end date and duration. The bar graph can be clicked on and dragged to manipulate schedules for projects and task schedules. The widget has 2 view modes: weeks and months view.

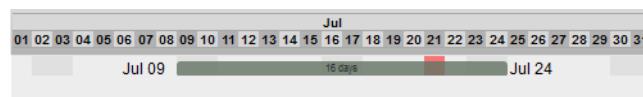
Usage

*View modes: *Toggle the Gantt Widget between the 2 viewing modes by double clicking on the column header.

view mode: **months**



view mode: **days**

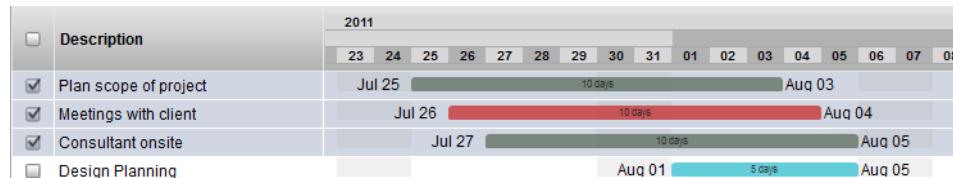


Start/End Date: Modify the start and end dates by left clicking and dragging them.

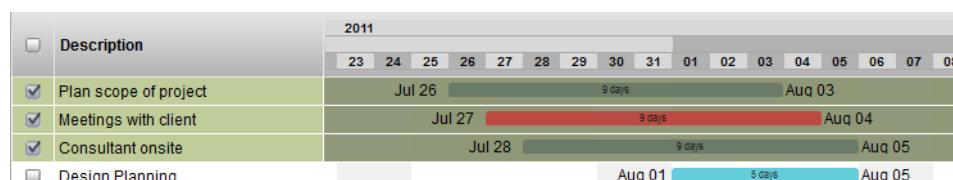
Hover Pop-up: Hover the cursor over the horizontal bars to pop-up a window that displays the dates of the schedule.

Shifting the bar: Click dragging the bar shifts the start and end dates bar while maintaining the duration.

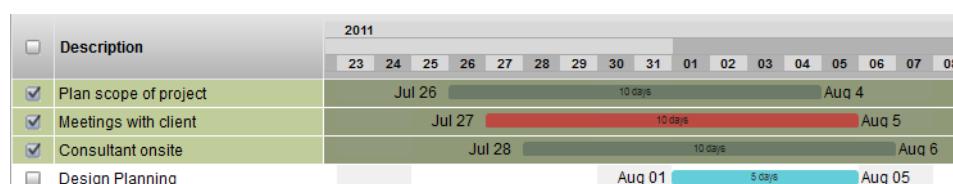
Multi-selection Edit: First, check mark the items to be modified.



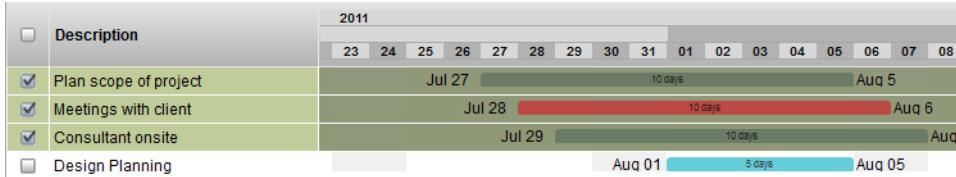
Adjust multiple start dates: With multiple items selected, click drag on one of the start dates to adjust all the start dates simultaneously.



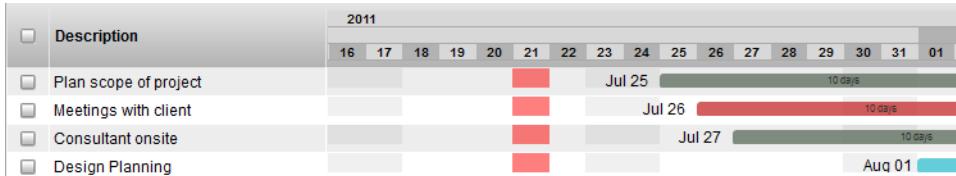
Adjust multiple end dates: With multiple items selected, click drag on one of the end dates to adjust all the end dates simultaneously.



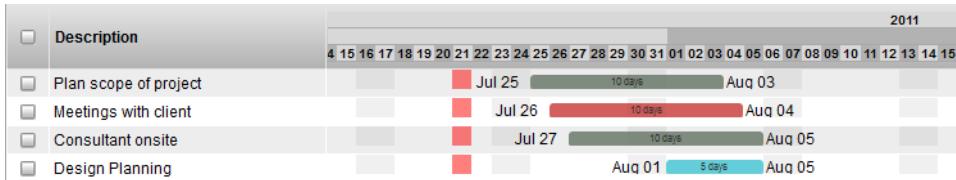
Shift all the bars: With multiple items selected, click drag on one of the bars to shift all the start/end dates simultaneously while maintaining the duration.



Shift the view: Click drag on an empty area of the Gantt Widget to the mouse left or right. The bars and the units will shift while maintaining their values.



Scale the view: Hold down the shift key. Then, click and hold on an empty area of the Gantt Widget and drag the cursor to the left or the right. The bars and the units will scale while maintaining their values.

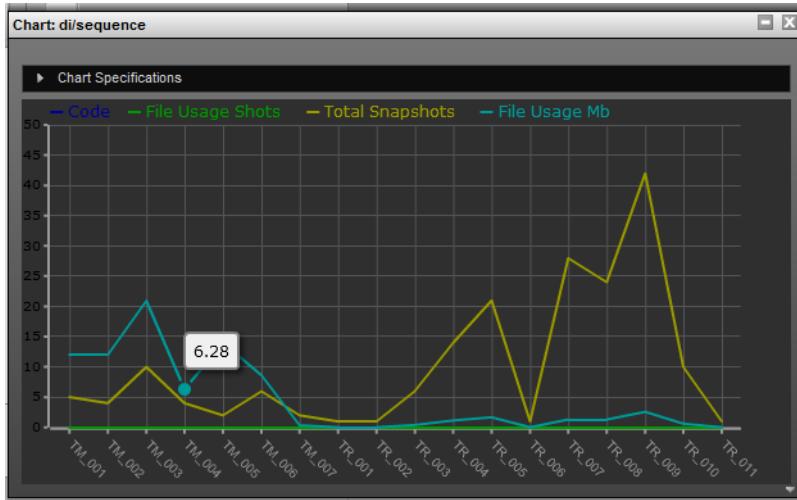


9.3 Charting

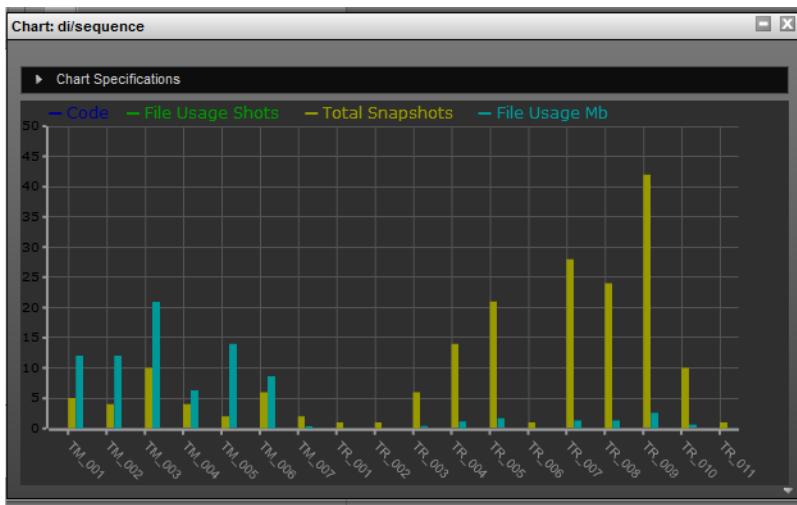
Tactic includes support for charting views in your project in different charting formats. These charts supply visual representations of your data for use in reporting, statistics and data comparisons.

The various types of charts available are:

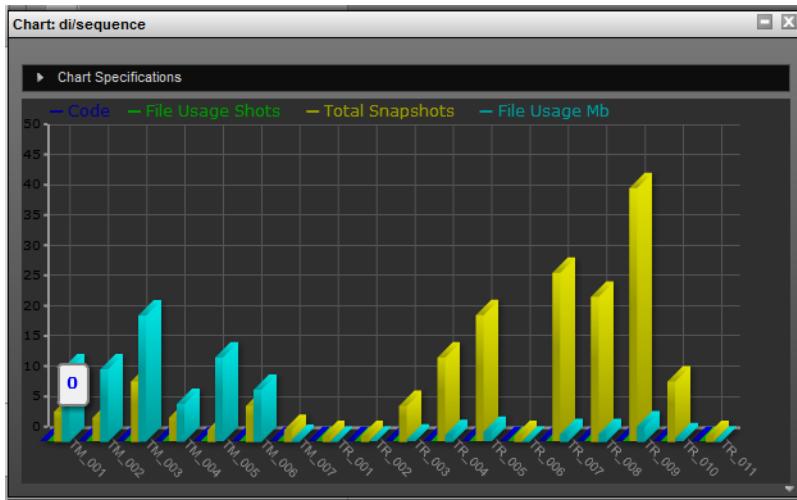
Line



Bar



Bar3D



Some notes about charting

When creating a view to be charted, it is important that the view includes columns which provide numerical based data. This data is required to allow the chart to draw correctly.

You are able to have multiple data values on the data axis of the chart. For example if you have a view of assets and want to include statistics on the total snapshots, total notes and total tasks the chart will be able to include all three.

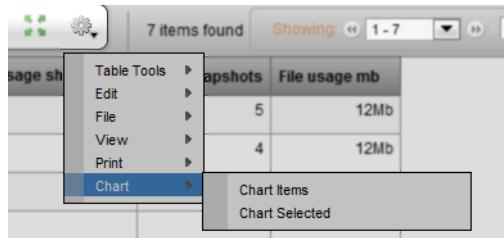
Generating Charts

- First create a view you wish to chart, in this case we will be using a *file usage* view. This view shows the Mb usage and snapshot count for all of the assets in the project.

	Code	File usage shots	Total snapshots	File usage mb
	TM_001	5	5	12Mb
	TM_002	3	4	12Mb
	TM_003	10	10	20Mb
	TM_004	2	4	6Mb
	TM_005	1	2	14Mb
	TM_006	2	6	8Mb
	TM_007	1	2	0Mb
		33	74Mb	

- In the table gear menu, there are 2 options: * **Chart items** - charts

all items in the system for the particular Search Type (in this example assets) * **Chart selected** - charts all selected items in the view.



3. In the gui, a chart will be generated with the assumed y-axis column being *code* and the x-axis being all other columns in the view. The setting for the chart can be further tweaked in the Chart specifications.



Chart Specifications

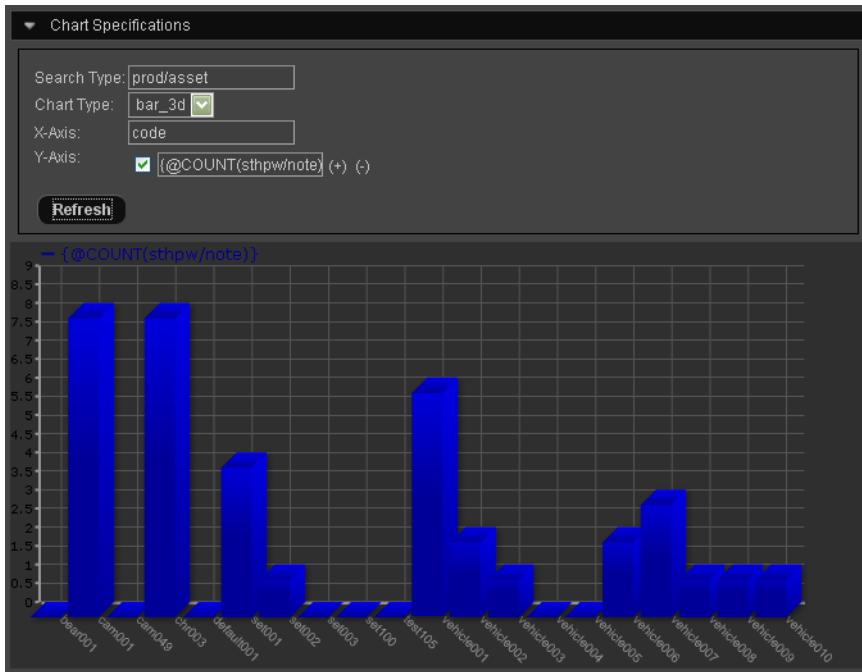
search_type	The Search Type the chart is being generated for.
chart_type	The type of chart to generate. See the chart types below.
Y Axis	The column to use for the y-axis
X Axis	The column(s) to use for the x-axis

Saving Charts

Currently Charts cannot be saved. This will be included in a future release of Tactic.

Advanced

Axis Expressions



The charting Gui supports using expression directly for the x-axis. To do so:

1. In the chart specifications, hit the (+) to add a new x-axis value.
2. In the text field provide an expression. For example {@COUNT(sthpw/note)}

Y-Axis: {@COUNT(sthpw/note)} (+) (-)

3. Refresh the chart and the expression will be evaluated as a column.

9.4 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.

		11 items found		Showing: 1 - 11					
		Asset Code		Description					
<input type="checkbox"/>	sc22				Bus travelling scene				
<input type="checkbox"/>	asset010				Sunset sky texture				
<input type="checkbox"/>	asset009				Engine Starting and Running				

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"

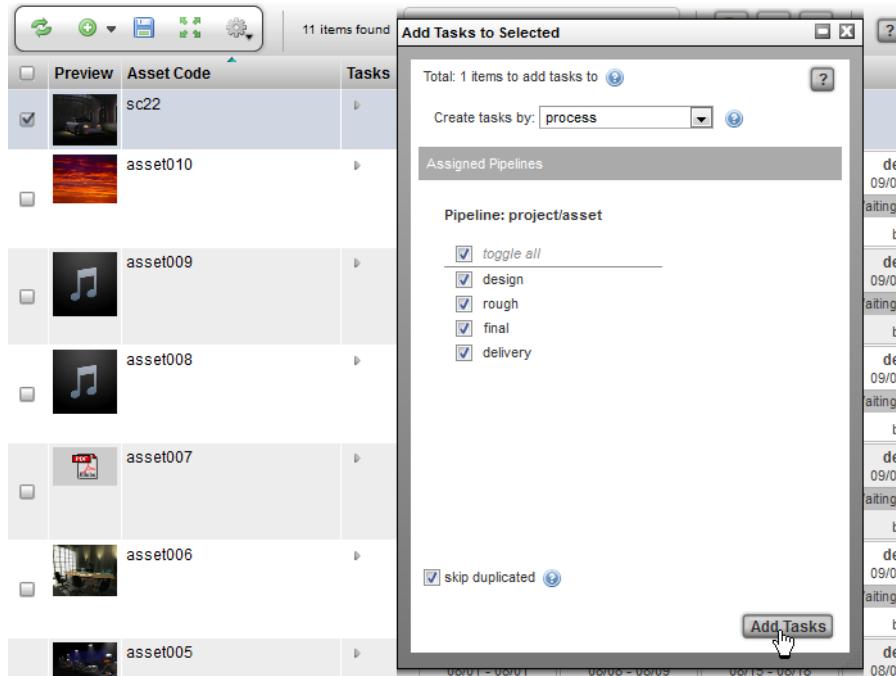
		11 items found		Showing: 1 - 11							
		Asset Code		Tasks		Task Pipeline					
<input type="checkbox"/>	t010				No tasks						
				design	08/22 - 08/22	rough	09/07 - 09/08	final	08/16 - 08/16		
				<input type="button" value="Ready"/>		<input type="button" value="Pending"/>		<input type="button" value="Pending"/>		<input type="button" value="Waiting"/>	

Switch Layout

- Tile
- List
- Content
- Task Schedule**
- Check-in

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.

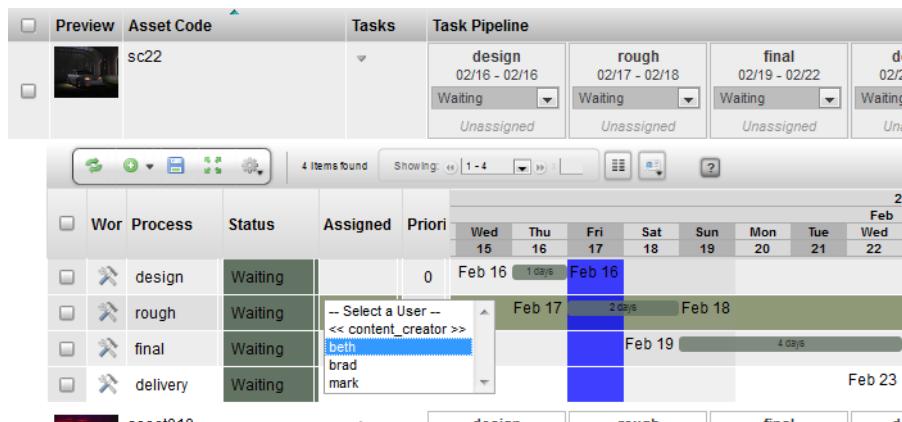


For now, click create tasks to create tasks for all process available in the pipeline.

Note

If a pipeline has not been set up for the particular sType 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.



10 Importing and Exporting

10.1 Exporting CSV Data

The screenshot shows the TACTIC application interface at the top, displaying a list of 12 items found. Below it is an OpenOffice.org Calc spreadsheet titled "project_asset_project_asset_list.csv". The spreadsheet has columns labeled "id", "preview", "title", "keywords", and "description". The data corresponds to the items listed in the TACTIC view.

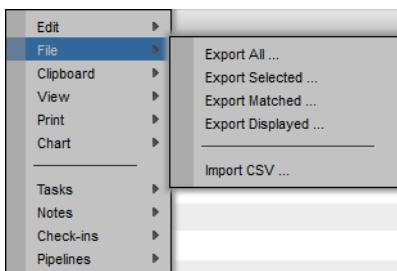
A	B	C	D		
1	id	preview	title	keywords	description
2	1	Nuclear Explosion		explosion, fire, nuclear, bomb	Stock footage of a nuclear explosion
3	2	Car Chase		car, chase, fast, race, map	Stock footage of a overhead car chase.
4	3	Car Warehouse		car, warehouse, dark, headlights, exterior, engine	3D Car asset in a warehouse setting
5	4	Sport Car Warehouse		car, warehouse, interior, dark, headlights, engine	3D Car sport car asset

Description

TACTIC uses a database and thus naturally exports to table-based outputs. TACTIC includes a simple user interface to export any table-based view out to a CSV file (Comma Separated Values file). Data can also be edited and imported to update or create new items in TACTIC.

Exporting Data

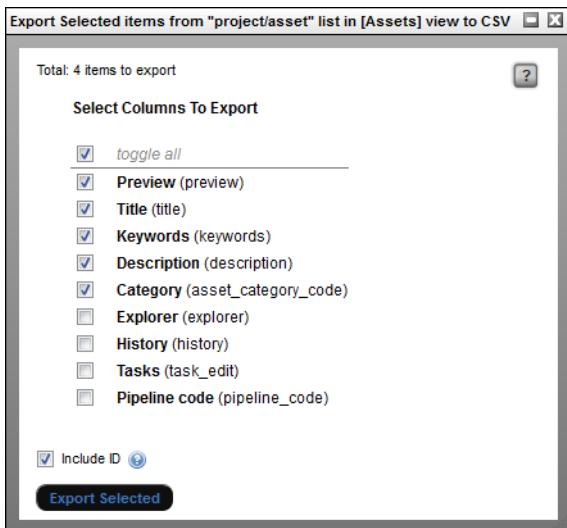
To export data from a TACTIC view to a CSV file, first check mark the rows to export. Then, go to the gear menu and under File select one of the following options:



Other export options include

- **Export All** - All items in the database
- **Export Selected** - Only the selected items in the view.
- **Export Matched** - All items found by the search
- **Export Displayed** - All items in the current view.

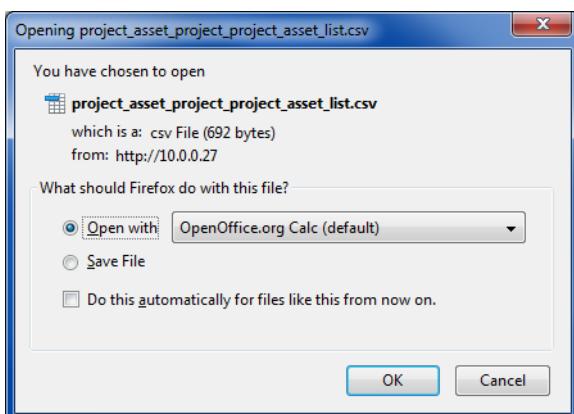
Next, select the columns to export from the selection list and click the **Export Selected** button.



Note

Only columns saved to the current view will be available for export. It may be ideal to save a view particularly for exporting which includes all desired columns.

Depending on your web browser settings, the web browser will prompt to open or save the file.



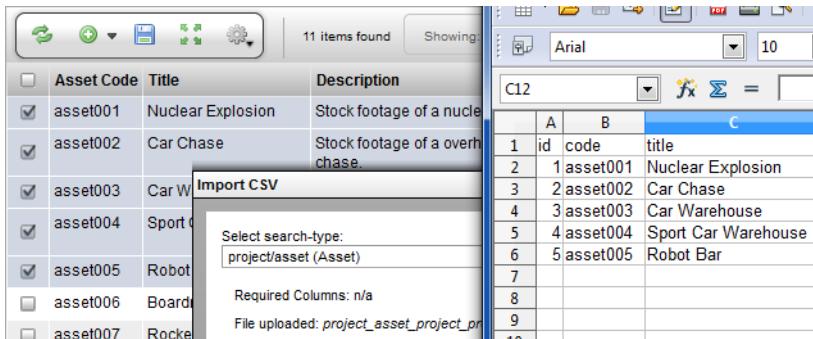
Below is an example of the contents of the resulting CSV file:

```
"id","preview","title","keywords","description","asset_category_code"
"1","","Nuclear Explosion","explosion, fire, nuclear, bomb","Stock footage of a nuclear explosion","video"
"2","","Car Chase","car, chase, fast, race, map","Stock footage of a overhead car chase.","video"
"3","","Car Warehouse","car, warehouse, dark, headlights, exterior, engine","3D Car asset in a warehouse setting","3d"
"4","","Sport Car Warehouse","car, warehouse, interior, dark, headlights, engine","3D Car sport car asset in a internal warehouse setting","3d"
```

When the CSV file is open in a CSV-compatible spreadsheet application, you will be able to easily manipulate and add data:

	A	B	C	D	E	F
1	id	preview	title	keywords	description	asset_category_code
2	1	Nuclear Explosion		explosion, fire, nuclear, bomb	Stock footage of a nuclear explosion	video
3	2	Car Chase		car, chase, fast, race, map	Stock footage of a overhead car chase.	video
4	3	Car Warehouse		car, warehouse, dark, headlights, exterior, engine	3D Car asset in a warehouse setting	3d
5	4	Sport Car Warehouse		car, warehouse, interior, dark, headlights, engine	3D Car sport car asset in a internal warehouse setting	3d

10.2 Importing CSV Data



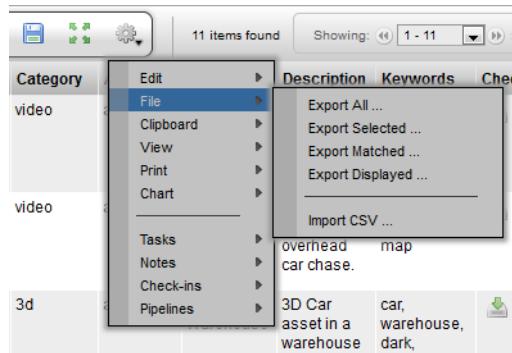
Data can be imported into TACTIC and associated with the appropriate columns. Since TACTIC is based on a table system, data can be exported as a CSV file for easy manipulation in a spreadsheet program.

Note

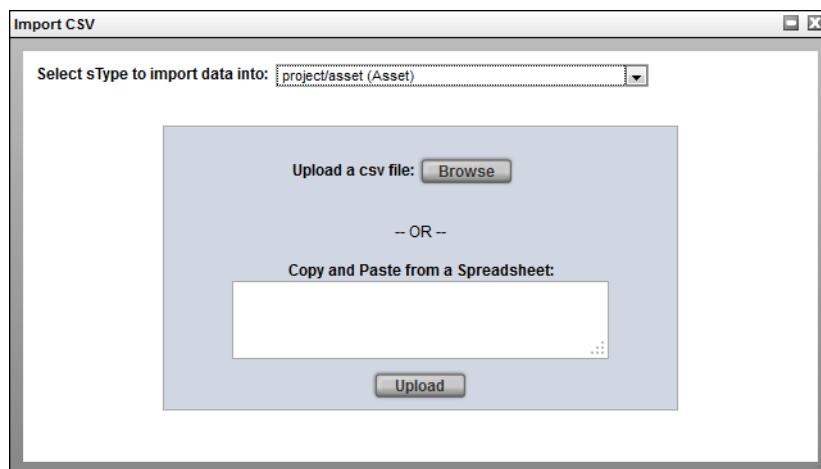
For more information on exporting existing CSV data, go to the section, "Exporting CSV Data."

To import a CSV file:

1. Go to **Gear Menu → File → Import CSV ...**



2. Select an sType or copy and paste the data from a spreadsheet. Once an sType is selected, the required columns will be displayed to the right of the drop down. Although these aren't the only columns that can be imported for this sType, they represent the minimum requirements for a successful import.



3. Browse and upload the CSV file. The CSV file is the raw format required by TACTIC. Below is an example of the contents of a CSV file:

```
"id","title","description"
1,"Nuclear Explosion","Stock footage of a nuclear explosion"
2,"Car Chase","Stock footage of a overhead car chase."
3,"Car Warehouse","3D Car asset in a warehouse setting"
4,"Sport Car Warehouse","3D Car sport car"
5,"Robot Bar","Robots drinking in a bar"
```

Below is an example of a CSV file being manipulated in a spreadsheet application.

	A	B	C
1	id	title	description
2	1	Nuclear Explosion	Stock footage of a nuclear explosion
3	2	Car Chase	Stock footage of a overhead car chase.
4	3	Car Warehouse	3D Car asset in a warehouse setting
5	4	Sport Car Warehouse	3D Car sport car asset in a internal warehouse setting
6	5	Robot Bar	Robots drinking in a bar
7			

4. Click the Upload button. The TACTIC system will introspect the CSV file and fill in the rest of the import interface.

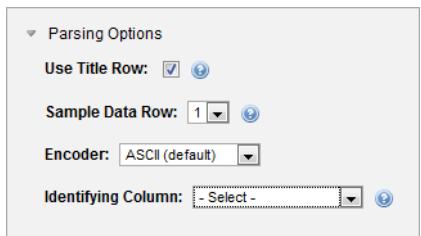
The screenshot shows the 'Import CSV' dialog box. At the top, it says 'Select sType to import data into: project/asset (Asset)'. Below that, 'File uploaded: project_asset_project_project_asset_list.csv' with a 'Change' button. A note says 'The following is taken from first line in the uploaded csv file. Select the appropriate column to match.' The 'Parsing Options' section includes 'Use Title Row:' (checkbox checked), 'Sample Data Row:' (dropdown set to 1), 'Encoder:' (dropdown set to ASCII (default)), and 'Identifying Column:' (dropdown set to - Select -). A note below says '💡 Use the sample row to match which columns the data will be imported into TACTIC'. The main table maps CSV columns to TACTIC columns:

	CSV Column Value	TACTIC Column	Create New Column
<input checked="" type="checkbox"/>	1	<input type="text" value="id"/>	<input type="text" value="id"/>
<input checked="" type="checkbox"/>	Nuclear Explosion	<input type="text" value="title"/>	<input type="text" value="title"/>
<input checked="" type="checkbox"/>	Stock footage of a nuclear explosion	<input type="text" value="description"/>	<input type="text" value="description"/>

At the bottom, there's a 'Preview Data' section with 'Refresh' and 'Import' buttons. It shows the following table:

id	title	description
1	Nuclear Explosion	Stock footage of a nuclear explosion
2	Car Chase	Stock footage of a overhead car chase.
3	Car Warehouse	3D Car asset in a warehouse setting
4	Sport Car Warehouse	3D Car sport car asset in a internal warehouse setting
5	Robot Bar	Robots drinking in a bar

5. Parsing Options



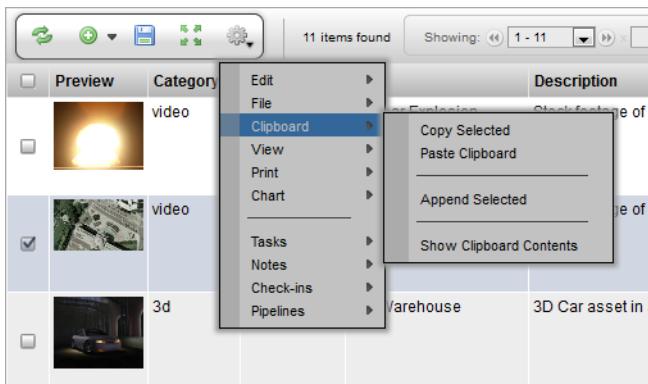
Use Title Row	When checked, this import will read the first row in the file to determine which item columns are being imported.
Sample Data Row	Specify a row in the file to use as a sample for the data import.
Encoder	Select the encoding format for the data: ASCII (default), UTF-8, Excel ISO 8859-1
Identifying Column	Select the column which uniquely identifies the corresponding row in the table to update the data with.

6. Import

The bottom of the page shows a preview of the import results. Hitting the **Import** button will start the CSV import.

11 Clipboard

11.1 Using the Clipboard



Introduction

The Clipboard menu feature provides an easy method for transferring items (row data) from one view to another. Items can also be copied between different projects. This feature can be used similarly to the copy and paste function that we are familiar with in most applications.

The Clipboard Menu Options

The features for the Clipboard can be found on the tool shelf under the **Gear menu → Clipboard**.

The individual options of the Clipboard menu are described in detail below.

Copy Selected

This menu option copies the items to the Clipboard that you have checked marked in the view. Either one row or multiple items can be copied. Once the items have been copied to the Clipboard in memory, the destination view has been navigated to, to allow pasting the items.

Note

The Clipboard has been built with the ability to copy and paste items from one project to another.

Add Selected

This menu option copies the items that have been check marked and adds them to the items that are already have on the Clipboard without wiping out what is on the Clipboard. This menu option is useful especially when navigating through different views to gather row data.

Paste Clipboard

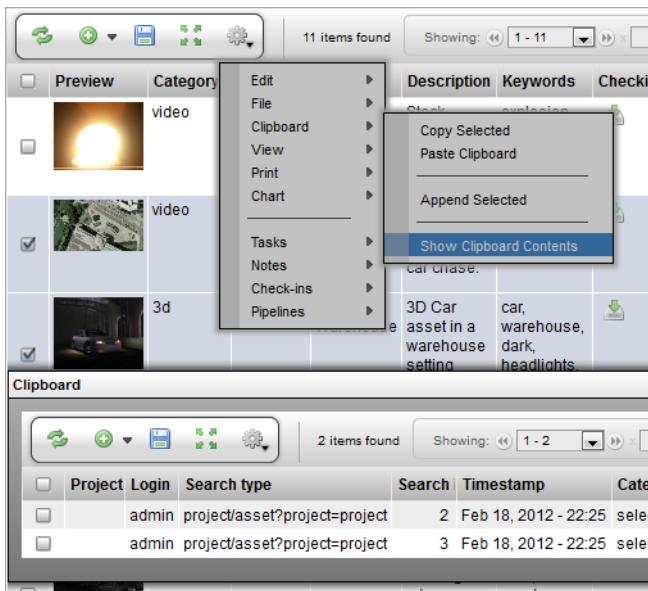
This menu option pastes the items that have been stored in the Clipboard into the view.

Note

Regarding copying and pasting to another project and the History column: After pasting the contents of the Clipboard to the view, the latest History of the item's check-ins will refer to the item under the original path where the files live. The paths will point to the item in the new project as soon as the first check-in transaction is completed for this item under the new project.

Show Clipboard Contents

This menu option opens up a pop up and displays the items that are currently stored in your Clipboard.

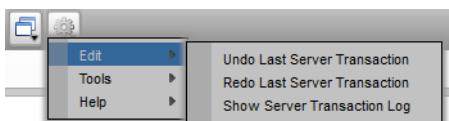


12 Transactions

12.1 Undo Your Actions

Similar to most software applications, TACTIC provides a convenient way to undo an action. Almost every action in TACTIC is undoable. Transactions can include changes made to the database and to the file system (for example: check-ins). One major benefit with TACTIC transactions is that they are not scoped to just your current session. If you close down Tactic and log in a week later, you can still undo your last transaction.

The Undo action can be found by clicking on the top gear menu and choosing: **Edit → Undo Last Server Transaction**



To see a list of the transactions which can be undone, click **Show Server Transaction Log**. (This log contains only those actions completed by the user who is currently logged in.)

The screenshot shows a software interface titled "Transaction Log". At the top, there is a dropdown menu labeled "Show Undo Log From:" with options: "1 Week Ago", "All", "1 Hour Ago", "Today", and "1 Day Ago". Below the dropdown is a table with columns: "Id", "Login", "Timestamp", "Description", "Namespace", "Type", and "Details". There are two rows of data:

		Timestamp	Description	Namespace	Type	Details
13334	admin	Jan 13, 2012 - 20:26	Added 1 Items for [sthpw/note]	project	redo	
13333	admin	Jan 13, 2012 - 20:25	Added 1 Items for [sthpw/note]	project	redo	

Below the table, there is a "Transaction" section containing XML code representing the transaction details. At the bottom of the window, there is another table with three rows:

		Timestamp	Action	Namespace	Type	Details
13332	admin	Jan 13, 2012 - 20:08	delete_sobject	project	undo	
13331	admin	Jan 13, 2012 - 20:07	retire_sobject	project	undo	
13330	admin	Jan 13, 2012 - 20:07	retire_sobject	project	undo	

Notice the drop down selection menu provides a way to filter the transaction list by time.

The screenshot shows a dropdown menu with the option "Login" selected. The menu also includes other options: "All", "1 Hour Ago", "Today", "1 Day Ago", "1 Week Ago", and "1 Month Ago".

To reverse the transactions directly from this log, click Undo to undo the most recent transaction in the log. Continue back through the log, undoing one transaction at a time until the transaction to be undone is reached.

When a transaction is undone, it is relabeled with the type "redo" in the "Type" column. The original action can be performed by clicking on the Redo button.

13 Glossary List

13.1 Context

To allow for separate versioning of files within the same SObject (container) during checkin, TACTIC uses "versions" and "contexts." Snapshot data always includes this information.

Contexts define a separate "channel" for checking in files. For example, one SObject may require separate files to be checked in for different tasks. For example, in the following list one drawing file is checked into a single SObject with both "rough" and "final" contexts (and with multiple versions). In this case, the contexts represent files checked in for both the *rough* and *final* processes (tasks).

```
/assets/myProject/drawings/drawing_001/drawing_001_rough_v001.png
/assets/myProject/drawings/drawing_001/drawing_001_rough_v002.png
/assets/myProject/drawings/drawing_001/drawing_001_rough_v003.png
/assets/myProject/drawings/drawing_001/drawing_001_final_v001.png
/assets/myProject/drawings/drawing_001/drawing_001_final_v002.png
```

13.2 Searchable Object (sObject)

SObjects in TACTIC are not actual physical files, but instead they are descriptive containers that store all the information necessary to define an object and track it. If the definition of the Search Type permits, an SObject can contain relationships to child

SObjects. Separate SObject children can be used to store extra data. For example, they could be "task" SObjects set up based on the pipeline to track approvals and notes, or they could be "snapshot" SObjects that store file checkin and location information.

In a project, an SObject can be used to store the production data for any digital asset requiring multiple associated files. When you create a new SObject, you must create it based on a Search Type (for example, the "model" Search Type). When you insert this new SObject, you are simply inserting a new entry into the "model" Search Type's library. Based on the associated template Search Type, the new SObject will require specific data to be inserted. For example, a name, description, pipeline code and so on.

13.3 Retire

At times you may wish to offline an Search Object but, not remove it from the system. Every search type has a `s_status` property that when set to `retired` hides the SObject but, makes is easy to reactivate it.

13.4 Sidebar

Views provide users with what they need to see and how they need to see it. The are collections of different Search Type properties which are relevant to a team members role in Tactic. Views are mainly accessed through links in the sidebar either as **Project Views** which are configured for the whole production (but can be controlled with access rules) and **My Views** which are views a uses saves as their own personal views or "bookmarks". Views can also contain a saved search which, provides a view as a live report.

13.5 Project Workflow

Pipelines define a hierarchical set of processes that lay out all of the production and approval steps an SObject must go through before being completed. It is important to note that each process contains its own set of approvals (task pipeline). Typically a process must be completed before it can be handed off to the downstream process or processes. TACTIC uses pipelines in this manner: when a process is approved, the next downstream processes receive the green light to start.

13.6 File System

When files are checked in to TACTIC, they are passed through the directory and file naming conventions. This relieves the user of the responsibility of figuring out where to place files on the server and what to name them. Naming conventions are defined using the "naming" Search Type, which stores an expression used by TACTIC to generate the location and name for a file upon checkin.

13.7 Query

A query into TACTIC is a request to retrieve Search Objects from the database. In the Tactic interface when a user searches for something, they are doing a query.

13.8 View

Views in the TACTIC interface are built using a "Table" widget that is defined based on a Search Type. Views can be configured to display specific properties (columns) and also the widgets (tools) that are used to display them.

Views can also be filtered to control which SObjects are displayed with search tools. For example, search tools can create reports, or views summarizing which SObjects are at which stages in the pipeline. Views and reports can be saved as either project views, visible to multiple team members, or as personal views, visible to individuals ("My Views").

13.9 Note

13.10 Event

The TACTIC system is based on events, and every interaction with any SObject is tracked. Events may include changing a status, adding a note or checking in a file (to list but a few examples). Every event is logged into a transaction log, and can be undone. The transaction log is very valuable because it enables easy tracking of when something happened and who did it.

An event can also execute another event in the system (or a "trigger"). Triggers are set up as custom scripts which can be configured to do almost anything in TACTIC through the TACTIC Client API. Example uses of triggers include changing the status of another task SObject, checking in additional files, or executing an external rendering application.

13.11 Access Rule

When configuring TACTIC, it is important for both security and simplicity to set up appropriate access rules. Access Rules are typically applied to user groups, making it easier to control what different groups of users or departments can access in TACTIC.

13.12 Project

A TACTIC project defines a real-world project or separates one of its timelines. Each TACTIC project has its own separate database and structure. Projects are the highest level separation in TACTIC. They represent a separation in workflow, Searchable Types, Views, Access Rules, Naming Conventions Pipelines and more

Custom TACTIC projects can be built from the ground up to manage specific types of objects, processes and files. Alternatively, predefined, ready-to-use TACTIC project modules are available to expedite the setup process and provide custom integration tools appropriate for the project type.

13.13 Update

When you update an existing Serch Object in Tactic, this is called an update. For example if you change the description property (column entry), saving the changes commits an update to the database.

13.14 Snapshot

A snapshot describes an asset at a particular point in time. This description is sufficient to reproduce the asset completely at that point in time. TACTIC has its own XML description language to completely define assets and their dependencies to other assets.

A snapshot can contain any number of files. For example, in a Flash production, a typical checkin will result in 4 files: a .fla (the flash file to work on), .swf (a viewable file), and 2 pngs which represent a small icon and a large viewable image.

Every time something is checked in, a new snapshot is created of the asset. Snapshots can reference other snapshots, which allows TACTIC to define dependencies to other assets or other snapshots of the same asset.

13.15 Searchable Type (sType)

Within a project, there are many types of objects to manage, and each object type requires different properties and types of files to be stored. TACTIC uses **Search Types** to categorize the many types of objects that can exist in a project. Search Types are templates that determine how these objects are defined and handled. Views, pipelines, naming conventions, access rules (and more) are all defined based on assignment to a Search Type.

The basic architecture of the TACTIC system is built around interaction with objects through their Search Types. These objects or "instances of a Search Type" are called Search Objects or **SObjects**. The TACTIC interface is simply a layer of widgets (tools) delivered through a web browser that are provided for the user to search for SObjects, display them, and interact with them based on their Search Types.

13.16 Delete

Deleting a Search Object removes it from the database completely. Although undoable, this is only right after doing so. If you are unsure, retiring is often a good choice.

13.17 Task

A task is any job that occurs within a process, and is the fundamental atomic work element in project management. For details on tasks, go to **Working with Tasks**.

13.18 Notification

Notifications are triggers built to execute on specific configured events, and can be internal to TACTIC (notification SObjects), or even emails sent externally. Notifications can be configured to run based on rules that define the conditions that must be met in order to send out a message. Conditions help to streamline who receives a notification for a particular event, as well as the conditions specific to the event.

13.19 Trigger

Triggers are specific tools and scripts that are executed based on events which occur in Tactic. Within the project setup, there are tools which help setup triggers and notifications with simple tools. Although if required, these Triggers can be quite complex. Using the TACTIC Client API, you can achieve almost anything. For example, a trigger can be called when a task's status is changed. This type of trigger would first check what the status was changed to, and then only proceed to carry out a set of tasks if the status was, for example, "approved". This may be as simple as changing the status of another task or as complex as loading the final checkin for that task, render it to a video file and then check it back into TACTIC.

13.20 Checkout

Checkouts in Tactic is when a user requests a particular snapshot. This request from the users standpoint can simply be a request for the current material which prompts TACTIC to deliver all of the files as well as any other dependant files to the user.

There are 2 ways for a user to actually retrieve the files for a snapshot.

1. The files can be loaded directly from the filesystem/fileserver. This way, the files are not copied to the users machine, they are left where they are and simply loaded up. For this to work, you would have to have direct access to the Tactic assets directory but can be more efficient as the files are not moved.
2. The files can be downloaded to the local sandbox where a user can work on them and save files however they like then when ready to commit a checkin, do so through Tactic. The sandbox is good in situations where the user is either off-site or there may be bandwidth issues opening the files directly.

13.21 Pipeline

Searchable Type metadata may also include a "pipeline_code" property to link the SObject to a pipeline SObject. In this event, task SObjects are also created from the pipeline's processes to define the processes the SObject will pass through as it progresses through its production. When tasks (processes) are defined, they ensure that an asset can only move along the pipeline with all checkpoints complete. For example, they can determine that the assigned user checks in files, generates notes, sets task status and receives management approvals. After all of the associated tasks for the SObject are approved and it is packaged up and marked complete, its production history information, files, and data are all still available as a package.

13.22 Process

A process is a definable phase in the pipeline of an asset. Processes require some type of delivery upon completion, and often require that an asset be checked in as part of the delivery mechanism. A process is typically assigned to one person or one department. For large projects, a single department could be assigned many processes.

13.23 Project Schema

The project schema defines the hierarchy between Search Types in TACTIC. The schema definitions are stored in a "schema" SObject which stores the parent and child relationships between the various Search Types in the project. The schema is automatically updated when search_types are created in TACTIC, and can be modified in a schema view.

Searchable Types define how you want to manage your objects and also define a separation in pipelines, views, checkin methods and more. They are some of the most important configuration aspects of TACTIC. The majority of the TACTIC architecture is built around the use of search types for the needs of the project as well as many of the system level aspects.

13.24 Sandbox

The location on your workstation storing the files you are currently working on.

13.25 Insert

When creating new Search Objects in your project, you are effectiavely *inserting* a new row into the database. If you insert a new Art sObject, you are creating a new entry in the "art" table in your project's database.

13.26 Checkin

Checkins in Tactic is generally the process of placing and registering all of the files that represent a "snapshot" of that object. This snapshot is a package in itself that understands all of the versioning and location for all files and/or folders that are a part of that checkin.

With the notion of each Search Object being a container, creating snapshots can be compared to creating and storing packages in this container.

From the back-end of Tactic the great aspect of this process is that this package is simply meta data that points to where the actual files and folders live in the file system. The main benefits of this that if Tactic we to be shut off, the files system will still be available and very well organized.