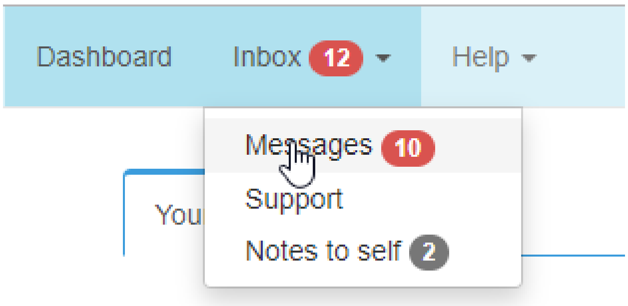
Built-in communication tools

Support/Helpdesk, the Inbox and project forums. Which tool should be used for what?

The Inbox (Messages, Support and Notes to self)



The Inbox is your hub for two-way communication with other Plint users (or one-way in the case of Notes to self). Messages, Support cases and Notes to self each have a corresponding tab and share the following traits:

- Communication is threaded (post/reply)
- Posts and replies result in email *notifications* to the recipient but communication should be kept in the system.
    - I.e. log in and go to the Inbox to reply.
- Files can be attached to any post or reply.
    - Supported formats, such as images, short film clips and PDF:s can be previewed in the browser, whereas other formats may require downloading.

Closed/Open, Read/Unread

The counter in the menu and on the tab indicates the number of **open** items. A red counter indicates one or more **unread** item.

Threads can be Closed or Opened by either party at any point. Closing a Message thread or Note will simply change its status, removing it from the default view. It can still be found, and reopened if needed, by searching for Status: Closed.

Messages and Notes linked to jobs?

[More on this here](#).

From General comments to Inbox: who sees what in a proofing workflow?

Besides literally starting a message thread with a project manager from a job info page, there is another step in Plint workflows which will automatically launch an Inbox message thread with the project manager: adding a **General comment** on status change.

This comment can also be made visible to other users. The example workflow below should give you an idea (see bottom of page for screenshots):

- Freelancer A completes a job in Plint Subtitler
- Freelancer A changes status and leaves a General comment
- Adding a General comment automatically creates a Message thread with Project manager
  - The thread is linked to the job
- An automatic notification email about this thread is sent to the PM
  - The notification includes the General comment
- A standard "Job open" automatic email is also sent to the owner of the child job
  - In this case Proofing, owned by Freelancer B
  - This email does *not* contain the General comment
- However, Freelancer B can see the General comment under "Track changes" in Plint Subtitler along with the Milestone for the status change
- Freelancer B completes proofing in Plint Subtitler
- On status change, Freelancer B set Approved to "No" and adds a General comment
- This comment also results in a Message thread
  - This one between Freelancer B and Project manager
- (Each freelancer can only see *their own* threads with the Project manager)
- Since the translation was not Approved, the parent job is reopened
  - An email explaining this is automatically sent to Freelancer A
  - This email contains the General comment

In summary

A status change always results in an email notification to the owner of the job which is now open for work. Depending on the scenario, this job may be a child job *or* the parent job.

Adding a General comment on status change also starts a Message thread with the Project manager.

It is up to the project manager how to handle these. If the information does not need to result in further action or communication, they can simply close the thread. If the information in the message thread should be easily available throughout the project, for other project managers as well, it's advisable to leave the message thread open. This will ensure that the message icon is shown in the joblist, for example.

About closing messages

- Closing a message thread also closes it for the other person (it can still be found under "Closed" messages).
- This will also remove the Message icon from the joblist and the message will not be included in the Inbox counter

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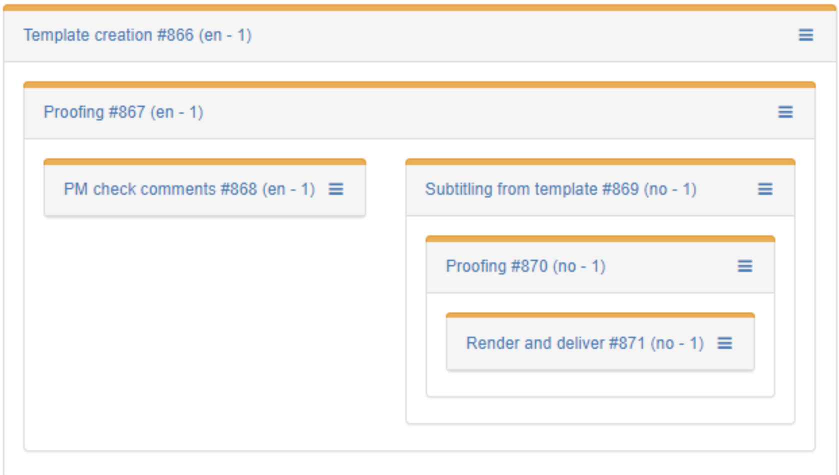
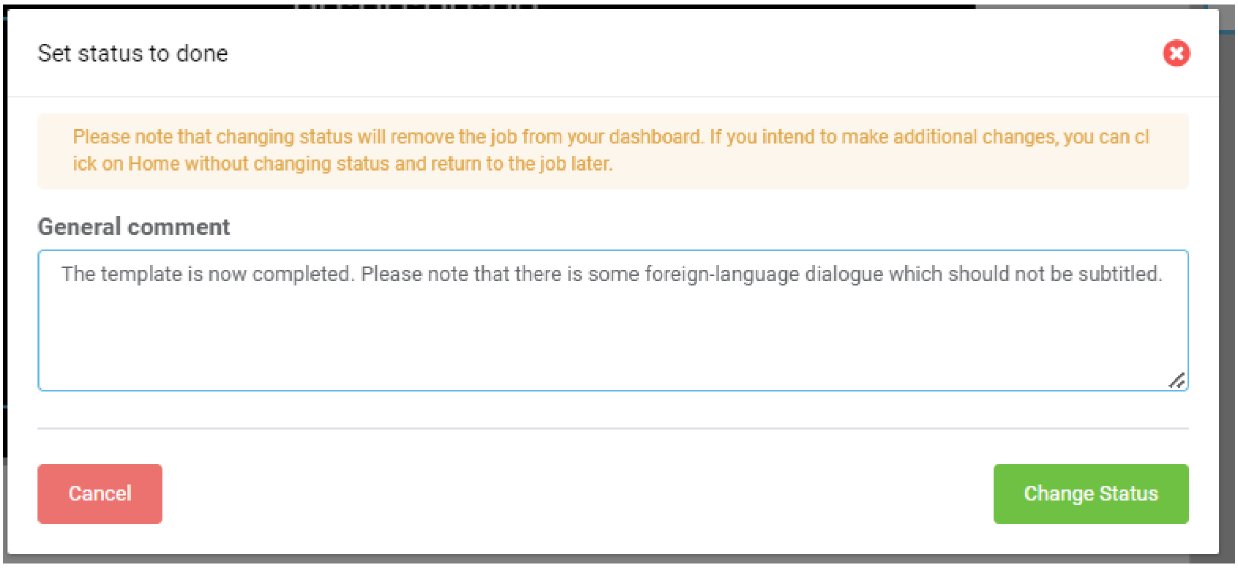
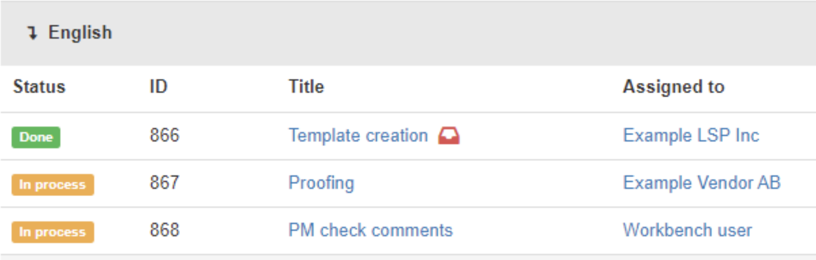
The workflow described above as seen in a joblist in tree view



On status change, the Template creator leaves a General comment



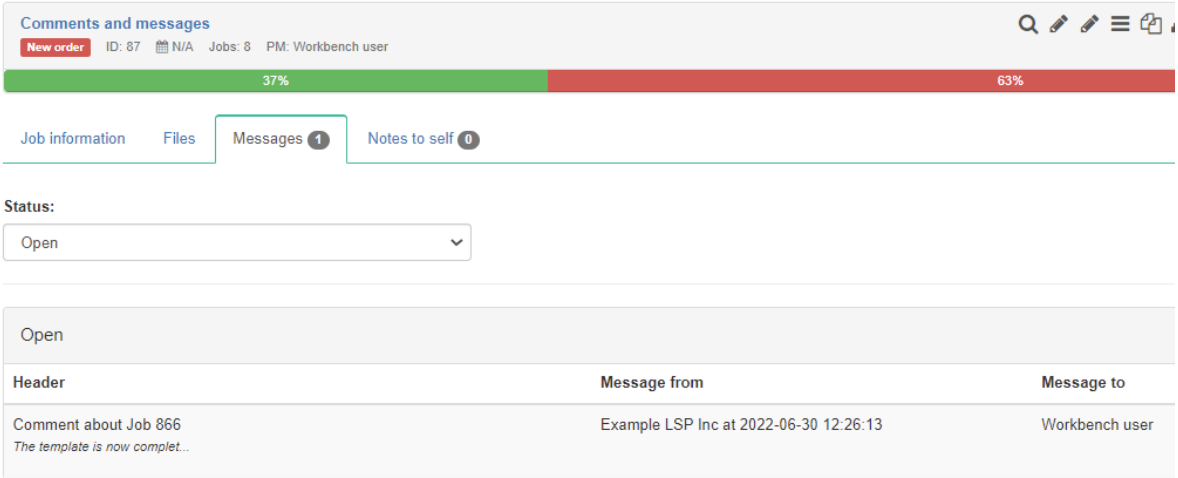
The automatic message thread is marked in the joblist



↴ English

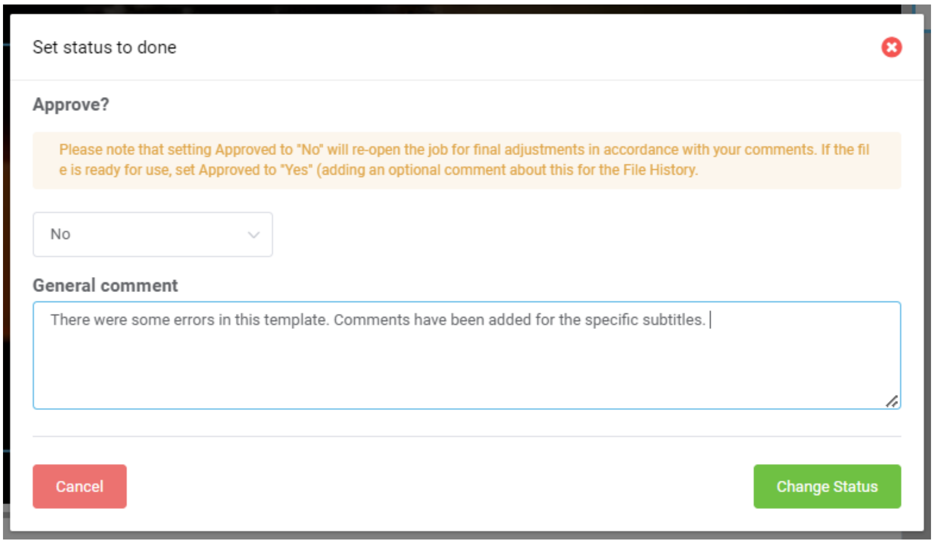
Status	ID	Title	Assigned to
Done	866	Template creation	Example LSP Inc
In process	867	Proofing	Example Vendor AB
In process	868	PM check comments	Workbench user

And can be viewed from the job info page by both project manager and job owner



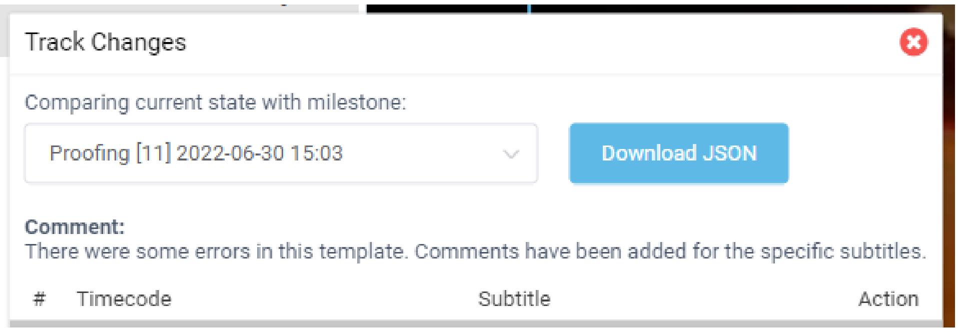
The owner of the child job, Proofing, gets a standard Job open email (which does not contain the General comment)

The owner of the Proofing job completes the review, changes status, chooses Approved=No and adds a General comment



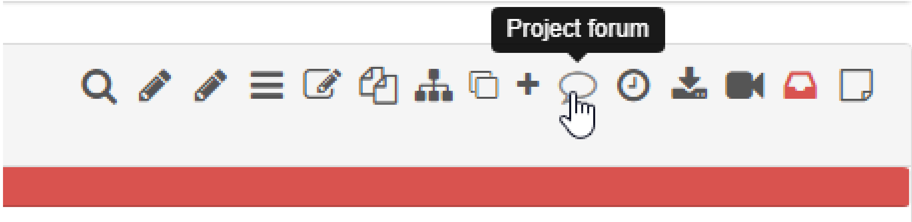
The owner of the (reopened) parent is notified by email. This notification does contain the General comment.

The General comments can always be seen under "Track changes" for the respective Milestone, (if the job allows Track changes and Milestone comparison)

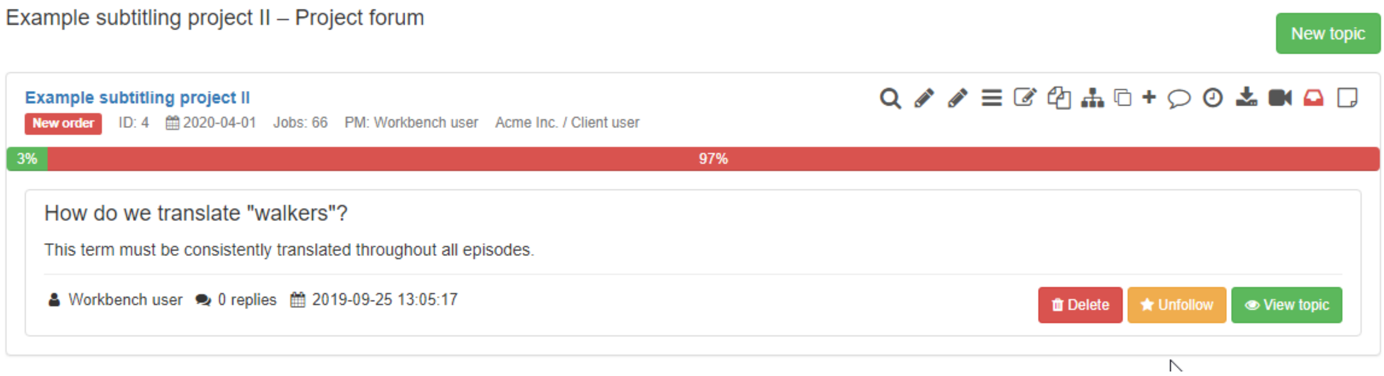

Track Changes
Comparing current state with milestone:
Proofing [11] 2022-06-30 15:03
Download JSON
Comment:
There were some errors in this template. Comments have been added for the specific subtitles.
Timecode Subtitle Action

Project forums

Each project comes with a built-in forum (unless you deselect that option when editing/creating the project). The Forum is accessed through the "bubble" icon in the project bar (regardless of login type).



On the forum page, previous topics are listed, along with an option to create a new topic.



Who sees what?

Forums are meant for communication between multiple users. The simple rule is that anyone who has a **job** on the project also has access to the forum and will receive notifications about new topics.

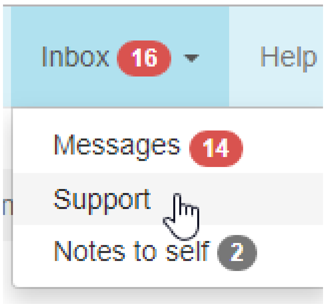
(However, you *can* exclude a certain user from all forums. This is a setting on user level.)

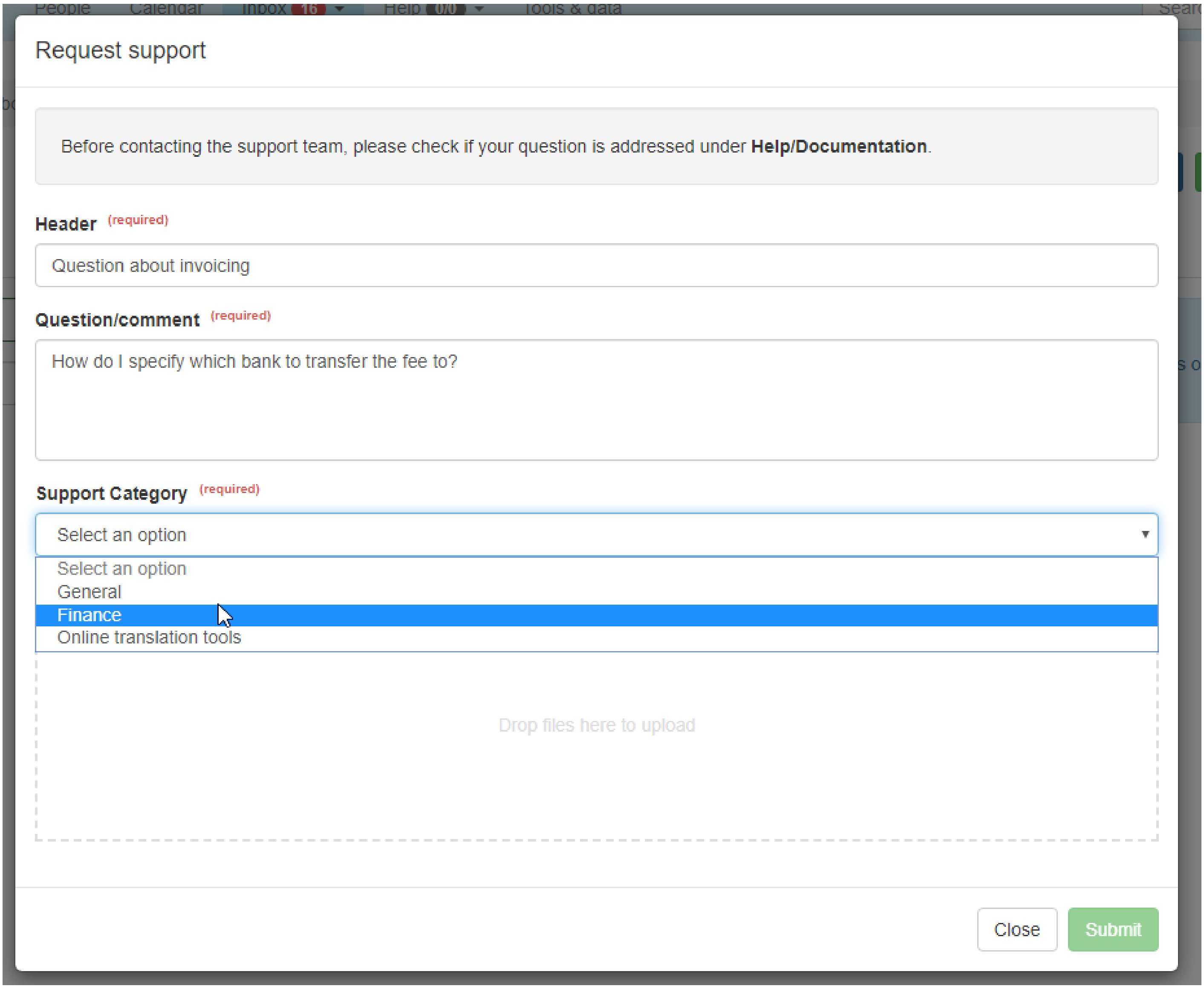
Email notifications

When a **new topic** is created, all users with access to the forum will be notified. To receive notifications about **new posts** in a topic, you can Follow (or "star") it. Replying to a topic will automatically make you follow it, but you can manually change this at any time.

Support/Helpdesk

Any user can request help by going to **Inbox / Support**. Asking a question here will create a new ticket to be handled by a Plint user who is set up to handle Helpdesk issues.





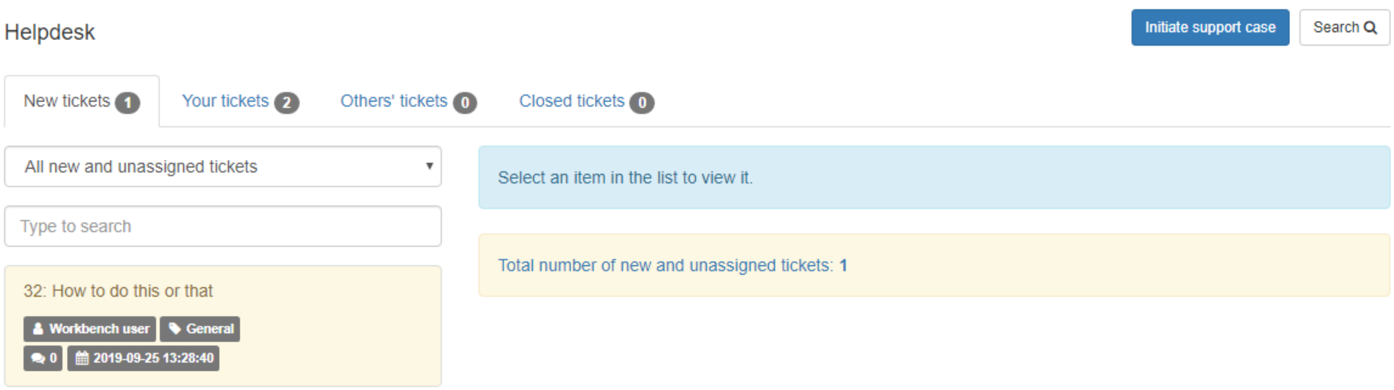
Setting up a Helpdesk

Staffing and preparing the built-in helpdesk consists of the following steps.

- Prepare **Support categories**
  - Support categories are handled under **Tools & Data** and can be associated with **Tags**.
  - This means that only users with matching tags can select that category.
- When editing a **user**, turn on notifications for Support tickets under the **Notifications** tab
  - This will make them a member of the Support staff and add the "Helpdesk" option for them under the Help menu
  - Selecting "Access without notification emails" will turn off notifications but still allow access to the Helpdesk
- Selecting Support categories for the Helpdesk user will:
  - prefilter which new tickets they see in the Helpdesk section
  - determine which tickets they get notifications about
  - Any Helpdesk user will still be able to see, and be assigned, *any* ticket, using the search tools.

Using the Helpdesk

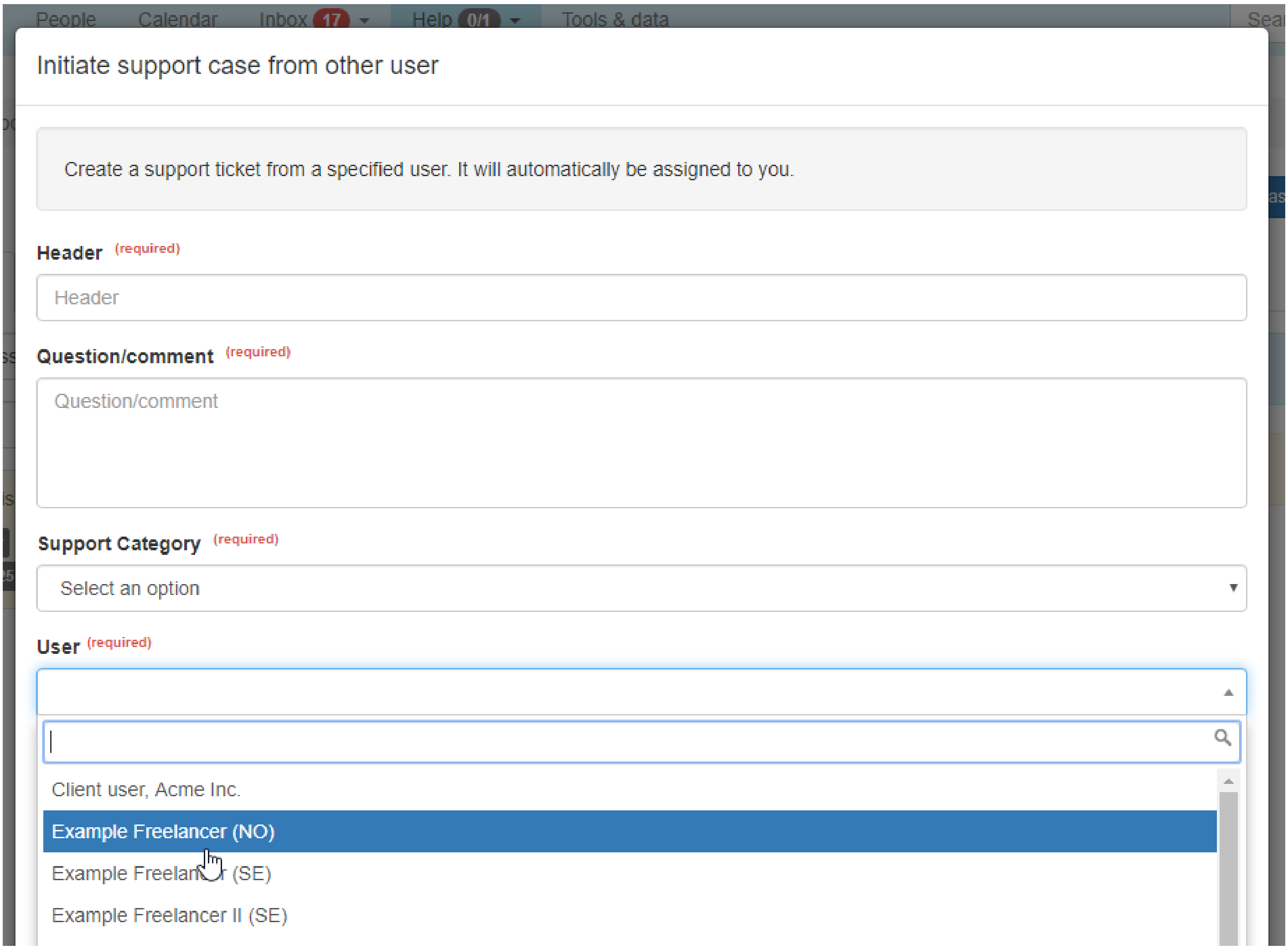
As a Helpdesk user, the first thing you see will be a tab showing new tickets. These, in turn, will reflect your support categories.



Click on a ticket to see the details and assign it to yourself, or someone else.

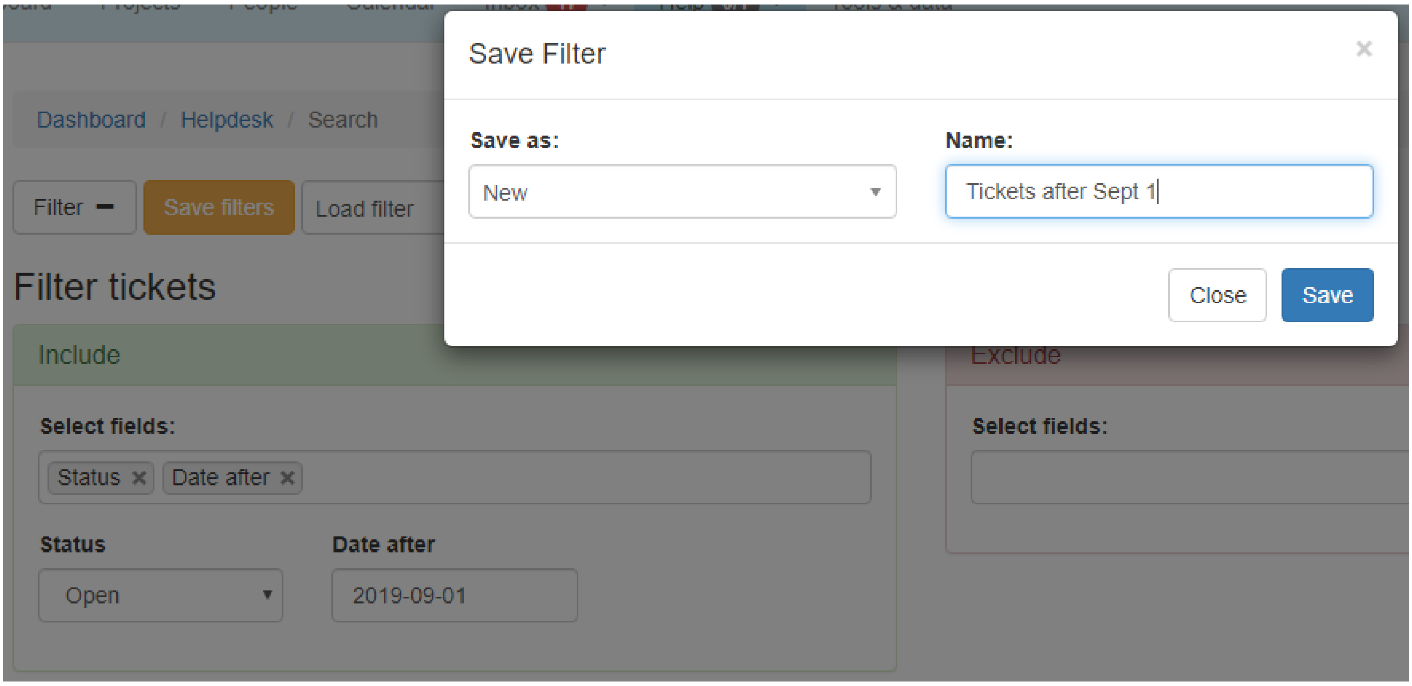
Initiating a support case for another user

If you have, for example, received a question from a system user over phone or email, you can initiate a support case and select the person in question as "User". The result will be exactly the same as if the same user had opened the case from within Plint.



The search option / reusing searches

Clicking **Search** will bring to a search form where you can combine various criteria. A search can be saved and named to be easily reapplied at a later date. It will also be available as a quick search option on the "New tickets" tab. This allows you to switch quickly between your "standard issues" (those matching your categories) and more specialised searches.


Dashboard / Helpdesk / Search
Filter
Save filters
Load filter
Filter tickets
Include
Select fields:
Status
Date after
Status
Open
Date after
2019-09-01
Exclude
Select fields:
Save Filter
Save as:
New
Name:
Tickets after Sept 1
Close
Save

System emails

There are two basic types of emails sent by the system: automatic notifications and custom-created emails, normally sent to several users.

Note: *Inactive* users will never receive system emails.

Automatic job information emails

Forum updates and Inbox / Support events will typically result in automated email notifications to the user(s).

In the following cases, automatic emails will also be sent. They contain a summary of the information usually relevant for this kind of notification and cannot be edited by the project manager. If a person is assigned several jobs which are the subject of a notification, a single email will be sent, summarising the information.

- When a job is completed by the assigned user, causing a status change, the system will look for a child job (which would now be open for work).
  - If one or more are found, all **owners of those child jobs will be automatically notified** by email.
- When a **job is reopened** for additional work.
  - This happens when a job is set to "Proofing-type" and the job owner selects "not approved" on status change.
- When a project manager uses the function to request **job confirmations** from assigned users from the joblist page.
- When a project manager uses the function to alert matching users about work in the **Shark tank** from the joblist page.
- Custom notifications can also be set for specific users, about for example:
  - New projects/orders
  - Status changes on projects where they are the project manager

Hi, Example LSP Inc

Job Awaiting Corrections: Template creation [W 25fps] 5EN

Project title: W 25fps

Job type: Template creation

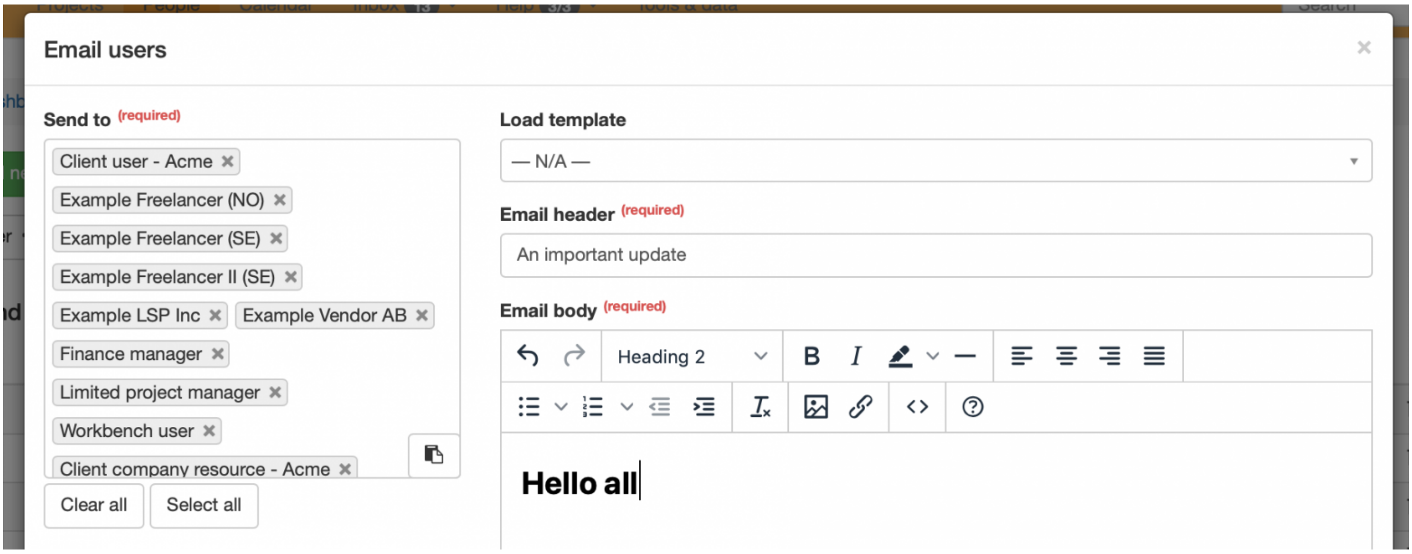
Job id: 54 **Part number:** 5 **Language:** English

Bulk emails from People page

Bulk email can be sent from the **People** page, targeting every user that matches the current filter. Email content can be created from scratch in the message window, or you can create an email template under **Tools & Data** to quickly reuse common messages.

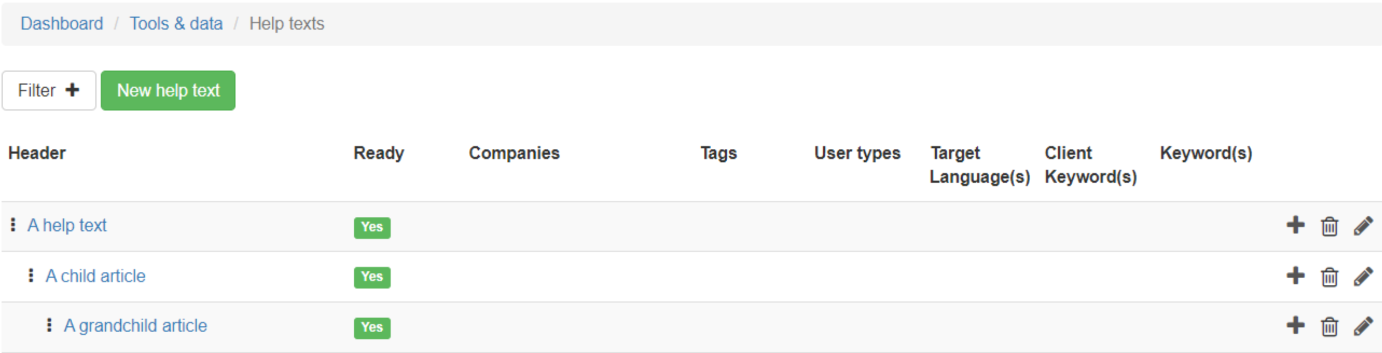
How to use:

- Go to People
- Filter out relevant recipients
- Click "Email users"
- Compose your message (or load a template)
- Submit
  - Optionally, you can send a test email to a specified address first, to check the message's appearance in your email client before sending it to multiple users.



Help articles

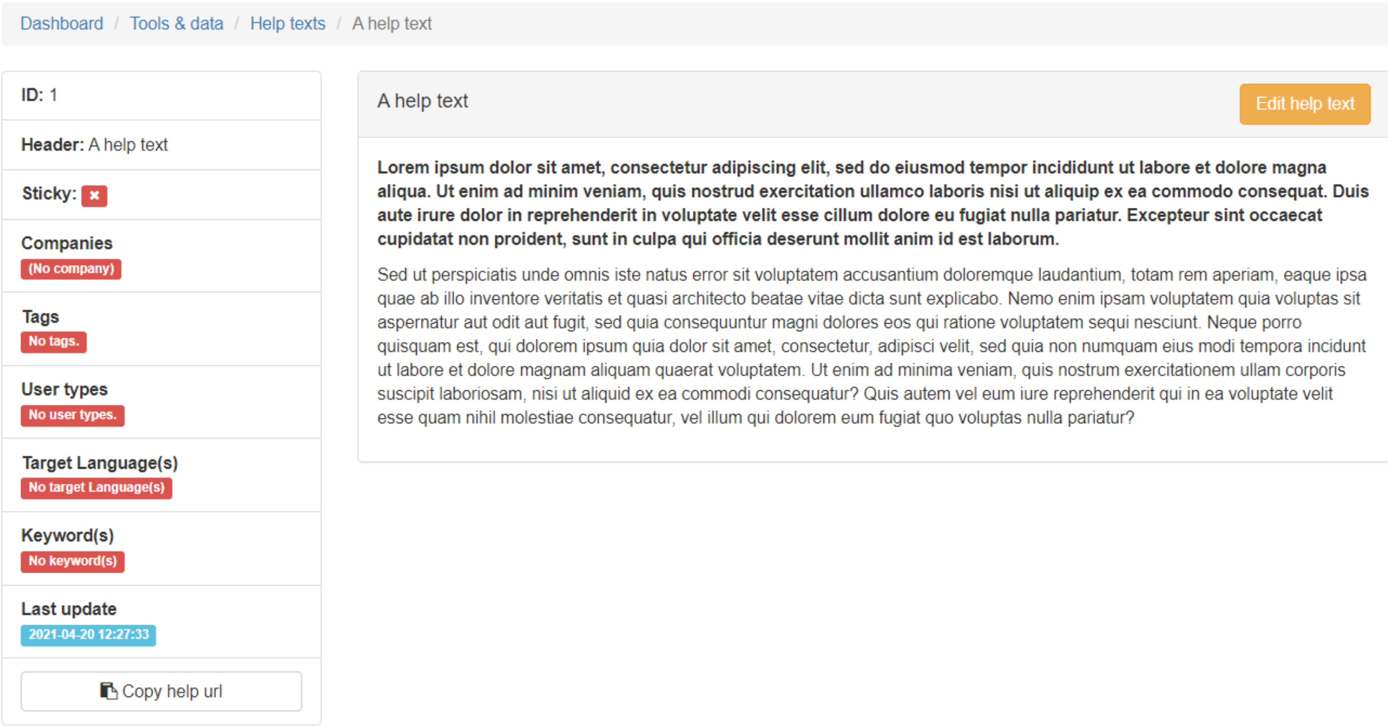
Under *Help / Documentation*, help articles targeted to different users can be shown. Here's how to edit and create them.



Editing and sharing Help article

As a Workbench user, or Manager with sufficient privileges, you can create and edit articles under *Tools & Data* / *Help texts*.
Please keep the following in mind.

- No article is shown under *Help / Documentation* unless "Ready for publication" is set to "Yes".
- Try to organise content under relevant parent articles.
  - This will help both when editing and viewing.
- Editing rights is not the same as visibility
  - You may have full access to all articles under Tools & Data for editing, but you may only see some of them under Help / Documentation (see "Visibility criteria").
- Share the right URL
  - If you want to share an article using an URL, don't send the link you use to *edit* them. They will probably not have access to this page.
    - Instead, use the URL for *viewing* the article.
    - The "Copy Help URL" button shown in the article overview will send this link to your clipboard.
    - You can also use the dropdown to link to a Help article when replying to a Support case.



Visibility criteria

Various criteria can be used to determine who sees a certain article – not unlike the criteria used to assign work. To facilitate this and create a clear structure, you can start by creating a main (parent) article with certain requirements. And child article attached to this will only be shown to user who match the requirements for the parent article.

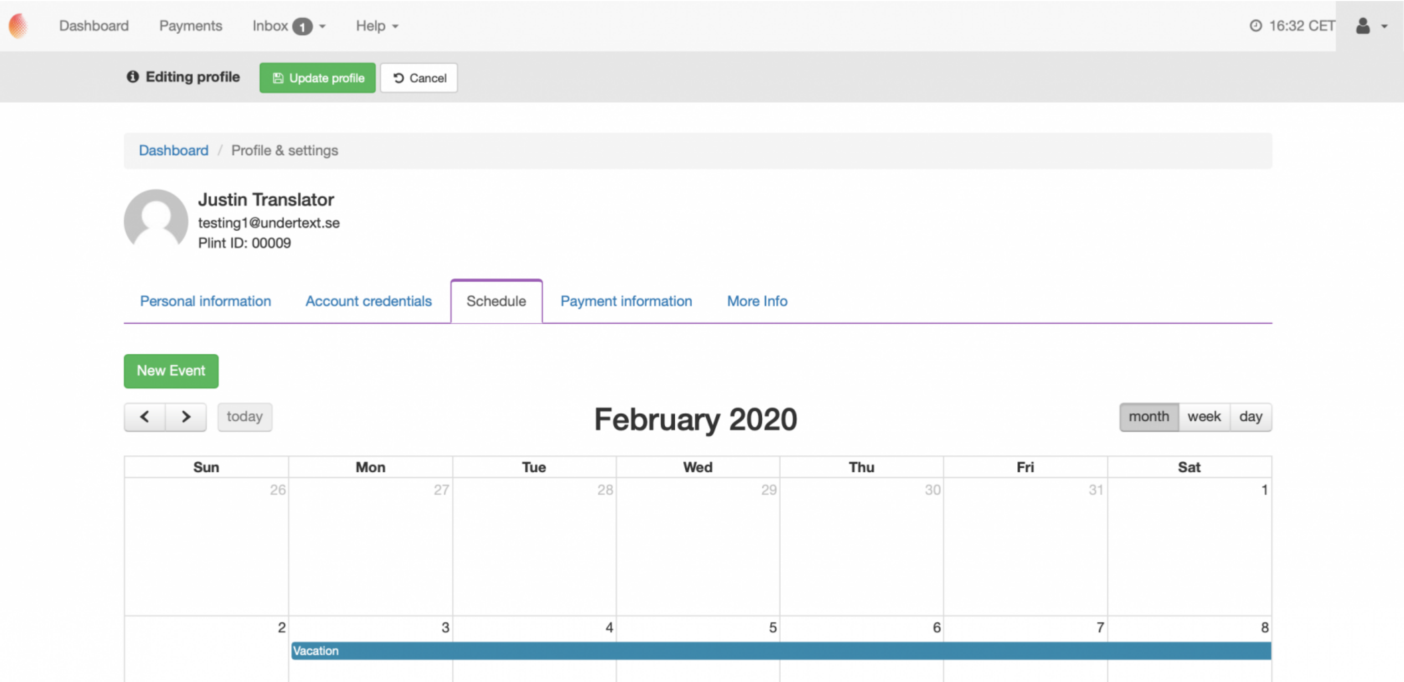
Tip: start with a main requirement for the parent article, such as a keyword or tag. You can then add child articles targeted to different users using additional requirements. Like so:

- Parent article: "Freelancer info about project A"
  - Requirement: tag "Approved for project A"
- Child articles
  - "Project A, Swedish"
    - Requirement: Target language = Swedish
  - "Project A, Norwegian"
    - Requirement: Target language = Norwegian

Only users with both tag "Approved for project A" *and* target language Norwegian will see the second child article.

Specifying availability

In order to help project planning, any user can add information about when they are not available for work. This is done by adding an event under: **Account icon / Profile & settings / Schedule**



Project manager tip:

You can show the **Schedule** column under People to immediately see the near term availability of all selected users.