

Understanding workflows and job assignment

What is a joblist and how can they be created and edited? How do you ensure the right person gets the job?

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Project structure

In order for jobs to be attached to the right part of a project, a structure of "nodes" is created automatically with the following hierarchy.

- Project (top level, there can be only one)
 - Part (an episode, a trailer, etc.)
 - Language (a target language to localize into)

All Plint workflow logic takes these nodes into account, whether you are manually attaching a job to one of these nodes or if you are applying a joblist template to create a thousand jobs automatically.

Please note that *parts* can have **labels** and other additional information which can be used to clarify their use, such as an episode name or an identifier string or number for matching against filenames or external systems.

Simple sample structure

A three-part project with three target languages would result in the following structure. Note that for each *part*, all target languages are repeated.

- Project:
 - Part 1
 - Swedish
 - Danish
 - Finnish
 - Part 2
 - Swedish
 - Norwegian
 - Finnish
 - Trailer
 - Swedish
 - Norwegian
 - Finnish

*Example joblist showing how Jobs (in white) are linked to the various Nodes (in gray) of the project structure. Jobs related to source media (which are relevant for all languages) are linked directly to the **part**, and language-specific work is linked to individual **languages**.*

Example subtitling project

New order ID: 1 2020-04-01 Jobs: 66 PM: Workbench user Acme Inc. / Client user

9%

91%

Project

[+ Add job](#)

1 - Part 1

(25 Minutes)

[+ Add job](#)

Status	ID	Title	Assigned to	Delivery date	Confirmation
Done	1	Media upload	Workbench user		Confirmed   
Done	2	Verify media	Workbench user		Confirmed    
English					Download OE file + Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation
Done	3	Template creation  	Example LSP Inc	2020-03-21 14:06	Confirmed    
In process	4	Proofing (Template) 	Workbench user		Confirmed    
Done	5	Auto-render, unassigned 			Confirmed   
Swedish					(Language: extra QC) + Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation
In process	6	Subtitling from template	Example Vendor AB	2020-03-29 03:03	Awaiting confirmation     
In process	7	Proofing	Example Freelancer (SE)		Confirmed    

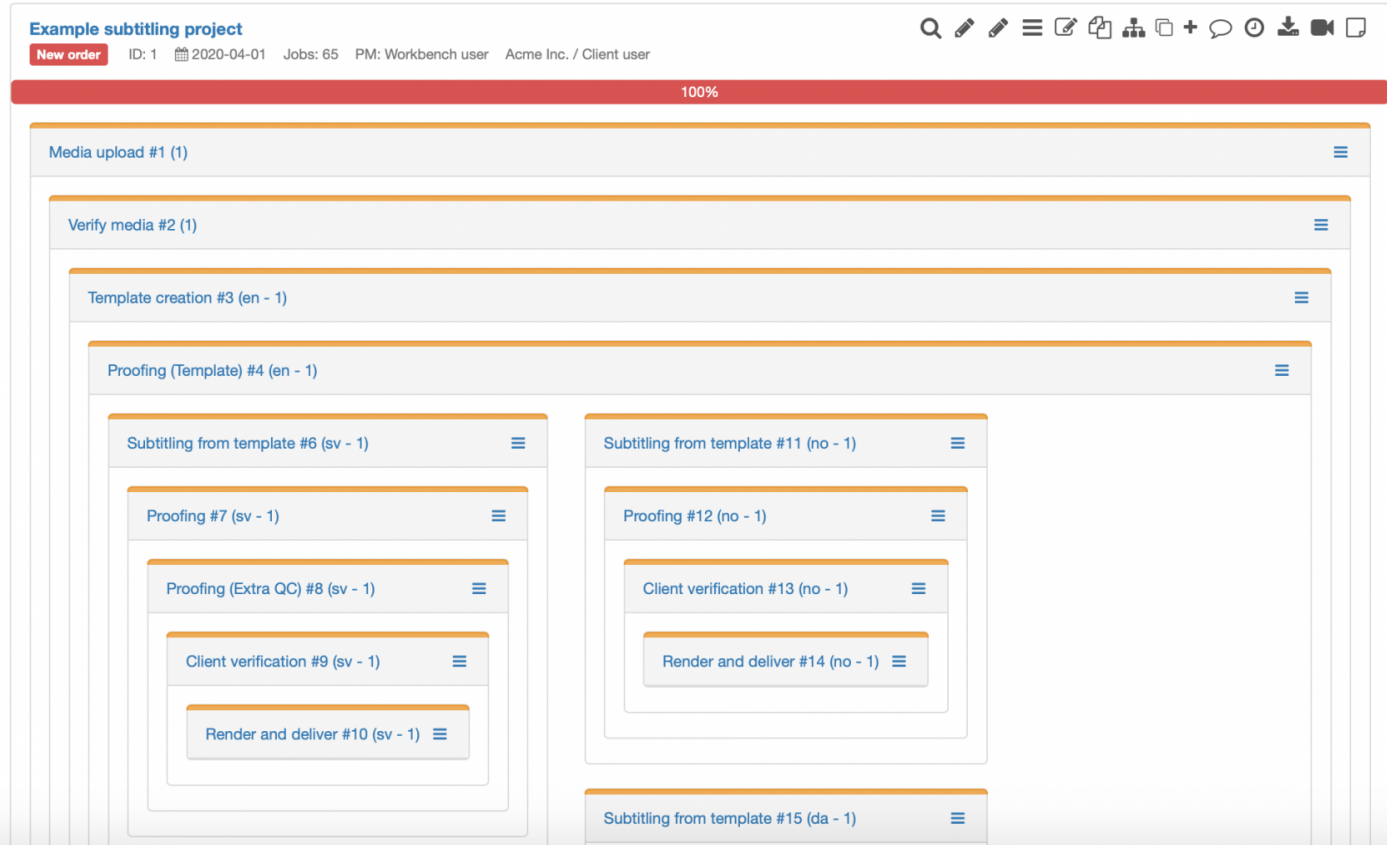
Jobs and joblists

Plint revolves around "things that need to be done". A thing that needs to be done is called a **Job** in Plint. Jobs can be completed in different ways (from just clicking "Done" to changing status after using the online editor to translate a feature film), but they all have the following in common:

- Jobs are always linked to **projects**.
 - A collection of jobs linked to a project is called a **joblist**.
- The confirmation status needs to be **Confirmed** in order for work to begin.
 - This is typically done by the assignee as a first step.
 - But jobs can be set to Confirmed from the start, for example with in-house tasks.
- They can have different **statuses**.
 - *In process* means that the job still needs to be done.
 - *Awaiting corrections* means that a job has been set to Done and then reopened for additional work.
 - *Done* = completed.
 - *Cancelled* means, well, cancelled.
- Jobs can have **parent** jobs.
 - Until the Parent job is Done, the child job is not open for work.

A typical joblist

A joblist in "Tree" view, showing interdependencies. The "Verify media" job cannot start until "Media upload" is Done, and so on.



Creating joblists with joblist templates

This chapter explains the general logic of joblist templates. For a detailed walkthrough of a sample joblist template, [go here](#):

A joblist in Plint may span hundreds of jobs that are to be completed sequentially. These lists can be created manually, but in most cases that would be way too tedious and time-consuming. This is where Joblist templates come in. They are arguably the most complex feature in Plint, but once mastered also the most powerful. In essence, they consist of a set of rules dictating:

- *where* to add jobs,
 - For example: once for each part or episode or repeated for all target languages
- in which order they should be done
 - using the parent-child logic
- *who* should do it
 - using the assignment criteria
- and *how* the job should be done
 - such as settings for the online editor, or expected file types for an upload job.

When correctly set up, joblist templates can add a thousand jobs in a matter of seconds. Any number of Joblist templates can be created, but it's a good idea to try to keep them as general as possible and use [tags](#) and other project data to trigger differences.

You need this:

1) A correctly set up project

Since Joblist templates rely on project data, the project itself should be in order first.

This typically means:

- deciding what language is “First” (the template language),
- specifying other target languages
 - Optional: adding Tags to target languages.
- Usually it's also a good idea to
 - specify Project manager and
 - Client contact person
 - before applying the template since certain jobs may be intended for them.

2) A Joblist template tailored for the project type in question

The Basic rules of template rules

a) Joblist templates work with *nodes*

As explained [here](#).

b) Rules are general

Instead of specifying, for example, what languages to add jobs to, you specify types of target languages, for example the "First" language, or those with a certain tag. Or just parts, for that matter.

Instead of specifying which *user* is to do a certain job, you specify *criteria*. When applying the template, the system looks for user matching those criteria. These can be simple criteria, like "Current Project manager" or [advanced combinations of factors](#).

c) Rules contain job info

Any information that can be set for a single job, can be set for a rule. This will make the jobs created by the rule inherit all its properties. Everything from basic job type to advanced settings for the Online Editor.

d) Rules are applied in the order they appear in the list

Simply put: order the rules in the chronology you want for the workflow. When you apply a Joblist template the rules will be applied one by one, going through all the project nodes and looking for the right place to act/add. You can reorder rules by dragging and dropping them.

(Make sure to adjust the Most recently created by option under Select parent job if needed.)
Information on which rule created a job is saved with the job, and can be used by other rules to find the correct parent job.

e) Joblist templates can be copied and tested

The best way to understand them is use them. You can easily duplicate a functioning template and modify it, without destroying the original. And after applying a template to a project, you can use Project milestones to remove all the recently added jobs if things didn't turn out the way you expected.

Reapplying joblist templates to a project

If you run a joblist template more than once on an existing project/joblist, it will do two things:

- Add *missing* jobs
 - For example if you have added target languages or parts
 - or added a tag that instructs the joblist template to add additional jobs
- Re-parent existing jobs if needed
 - If, for example, something has changed in the middle of the workflow

What it won't do

- It will not add *duplicate jobs*.
 - A duplicate would be a job in the same node with the same jobtype/custom label
- And it will never change the data of existing jobs.
 - If a rule that created the original job has changed, an already created job will never be updated to reflect this
 - Changes to joblist template rules only affect *new* jobs

Joblist templates: a detailed guide

For a presentation of the general logic of joblist templates, [go here](#).

The following is a detailed walkthrough of a complete, generic joblist template. The template in question can be found in a default installation of Plint, under *Tools & Data / Joblist templates*. A **project** like the one [described here](#) would work as a test subject.

The rules list

Each rule in a joblist template can create one or more **jobs**. When you apply it to a project, the rules will be triggered in the order they are arranged in the list. The list typically (but not necessarily) follows the chronology of the project steps. The rules can be dragged and dropped to change the order.

However, as you will see, *all* rules are not necessarily applied to a project. It depends on project or language settings. This allows you to maintain a limited number of joblist templates and use project data to fine tune the results.

Rules

1 - Media upload - Upload source media.	 Remove rule	 Advanced Edit
2 - Verify media - Check that media is visible in the Online edi...	 Remove rule	 Advanced Edit
3 - Template creation - Import file into the editor or create it from...	 Remove rule	 Advanced Edit
4 - Proofing (PM Template QC) - Verify that first template is ready for subse...	 Remove rule	 Advanced Edit
5 - Subtitling from template - Create translation based on template. Change ...	 Remove rule	 Advanced Edit
6 - Proofing - Subtitle QC in online editor. Add changes or...	 Remove rule	 Advanced Edit
7 - Proofing (Extra QC)	 Remove rule	 Advanced Edit
8 - Client verification	 Remove rule	 Advanced Edit
9 - Render and deliver	 Remove rule	 Advanced Edit

Rule 1 – Media upload

The goal in this case to add a "Media upload" job, which will launch the rest of the workflow. We'll also use the first rule to explain all the panels.

- **Add job(s) to:**

- Where in the project structure should these jobs be added?
 - A project typically begins with media ingest, with one file per **part** (e.g. an episode of a series).
 - Selecting "Part" will add one job of this type to *each part* (see [Project structure](#)).

- **Job options (panel one)**

- In the first panel you can add general information about the job, such as the [Job type](#), which together with the *Custom label* will be shown as the name of the job.
 - Please note that the selected Job type here happens to have the same name as the *Delivery method* (see below). This is not necessary but can be helpful in some cases.

- **Job options (panel two)**

- Use the [Delivery method](#) to specify *how* the job will be done.
- In this case, a file needs to be uploaded to the system and mapped to the correct part, and perhaps converted to an editor-friendly format. There is a built-in *Delivery method* that makes this easy, called "Media upload".
- If the job should be confirmed by the assignee, set Confirmation status to "Awaiting confirmation"
 - Since this is done by the Project manager (see more under "Default person"), that's not necessary in this case.
- Use the date options to calculate a job deadline based on information from the project, such as main project deadline, or the dates linked to individual *parts*.
 - Tip: you can calculate dates backward from a final delivery date: "when does this need to be done in order for us to complete the project on time?"
 - or you can take a point in time such as the arrival of the source media and calculate dates forward: "how long will this step take, once we have the file?"

- **Select parent job**

- This is perhaps the most complex part of creating joblist templates, but well worth mastering. By supplying the right instructions to the rule, it can ensure that an unbroken chain of interdependent jobs is created. In more concrete terms, it determines the ID of the job which should be the *parent* of this job.
- Selecting "No" will make this a job independent of any previous work. It will be open for work as soon as it is created. Since the Media upload jobs are the first to be completed for each part, that's the right setting in this case.

- **Default person**

- In this case, the *Project manager* is the right person for the job, so we will use this option.
- There is also an option to select the *Client contact*.
 - Both of these options will use the information from the project in question when assigning the job.
- You can also utilize the [automatic assignment logic](#) in Plint for a much more advanced user matching.
 - In order to do this, choose "Apply criteria" and then select which criteria to use.

- The rules can be applied right away and the "best" person pre-selected as soon as the job is created.
- You can also choose to simply store the rules with the job in order to make the final selection later. To do this, check the option: "Don't assign".
 - Explanation: More than one person may be eligible, and a project manager may want to make the final call from a list of relevant users. Or the job may end up in the [Shark tank](#), where anyone who matches the criteria will have a chance of grabbing it.

• Advanced edit

- Finally: anything that can be specified for a single job can be specified in a joblist template rule.
 - The settings you select here will be inherited by each job created by the rule.
 - A typical example would be "Editor settings", where you determine the behaviour of the built-in subtitle editor.
- If the option you seek is not available in any of the panels, select "Advanced edit" to open a dialogue which matches the edit form for individual jobs.

1 - [Media upload](#) - Upload source media.

Remove rule
Advanced Edit

Rule explanation

The step that links the source media to OE jobs. To be done by the Project manager for each Part. If even greater security is required, use the Aspera upload.

Add job(s) to

☐ Project
☒ Parts
☐ Langs

☐ First(s)
☐ General target(s)
☐ Internal(s)

☐ If company has tag
☐ If project has tag

Split into target media

No

Split into tags

No

☐ Repeat job for each matching user

Job options

Job type

Media upload

Custom label

Custom label

Comment / description

Upload source media.

Tag

Job options

Delivery method

Media upload

Confirmation status

Confirmed

Job delivery date

DAYS | HOURS | MINUTES

0 0 0

☐ Skip Weekends

Select parent job

No

Most recently created by

— N/A —

In same part

No

In same lang

No

In same target media

No

With same tag(s)

No

☐ Match tag(s)

Default person

Current project manager

Criteria

☐ Job type
☐ Target language
☐ Source language
☐ Project client keyword
☐ Project general keyword
☐ Order client company
☐ Match project tag(s)
☐ Match target language tag(s)

Match people filter

Match tag(s)

Prioritise users with tag

Priority

Shark Tank

No

☐ Don't assign (just save criteria)

Rule 2 - Verify media

The purpose of the second job is to make sure the converted video is correctly converted for online editing, including dependencies such as audio wave forms and shot change markers. This being a manual workflow, the job is done by the Project manager by simply opening Plint Subtitler, where the video will load automatically. Like the Media upload job above, it will be added to all *Parts* and assigned to the Project manager, but there are some major differences:

- There is no *Job type* for this job. A Custom label is sometimes enough.
- The *Delivery method* is *Online editor*.
 - Since this tool is where the actual subtitling will take place, it's a good way to ensure everything is in order.
- This job needs a Parent job: the media upload needs to be completed first.
 - In order to do this mapping, we use the most straight forward logic: find the most recently created job in the same Part. Since the Media upload jobs are created just before the Verify media jobs, this will work nicely.
 - (You can pinpoint matching further by specifying what *rule* was used to create the parent job)

2 - Verify media - Check that media is visible in the Online edi...

[Remove rule](#) [Advanced Edit](#)

Rule explanation

A simple Online editor job where you check that the uploaded media actually shows up in the editor. Set to Proofing-type, enabling the user to reopen parent job.

Add job(s) to ☐ Project ☒ Parts ☐ Langs ☐ First(s) ☐ General target(s) ☐ Internal(s) ☐ If company has tag ☐ If project has tag Split into target media No	Job options Job type (Custom Label) Custom label Verify media Comment / description Check that media is visible in the Online editor. If not, set to 'Not approved' on status change.	Job options Delivery method Online editor (NuTXT-W) Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES	Select parent job Yes Most recently created by 1 - Media upload In same part Yes In same lang No In same target media	Default person Current project manage Criteria ☐ Job type ☐ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language
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Rule 3 - Subtitle template creation

There are a few new concepts introduced in the next step. The goal is to create a timed subtitling template which will be used to facilitate translation into a number of additional languages. This first step is done for the "First" language, as explained below.

- The jobs are to be added to a certain language, repeated for each part.
 - The language should be the one tagged as "First", which is done on project level.
 - Note: There is an additional language setting on project level called "Internal" with the same possibilities.
 - This would typically used to flag languages where the work is not requested by the client but may be necessary to complete the project.
- We use a *Job type* called "Template creation", in order to be able to automatically calculate fees and assign this kind of work to the right user.

- The *Delivery method* is once again Online editor.
- We use the *Project deadline* to calculate a *Delivery date* for this job.
 - In this case, the subtitling template needs to be done ten days before final delivery of the complete project to ensure sufficient time for the following steps.
 - The parent job should be found in the same *Part* but *not* in the same *Language*.
 - We are now moving one level deeper into the [project structure](#).
- The *Default person* should be selected using Assignment criteria and match three properties:
 - Job type ("Template creation" in this case), Source and Target language.
 - This means that only users who have these qualities attached to them are eligible for the job.

3 - Template creation - Import file into the editor or create it from...
Remove rule
Advanced Edit

Rule explanation

The actual translation. This job is added to "First" langs. User can create file offline and import straight into the editor or create it from scratch in the online editor.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☒ First(s) ☐ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag ☐ If company has tag ☐ If project has tag Split into target media No Split into tags No ☐ Repeat job for each matching user	Job options Job type Template creation Custom label Custom label Comment / description Import file into the editor or create it from scratch in the online editor. Tag	Job options Delivery method Online editor (NuTXT-W) Confirmation status Awaiting confirmation Job delivery date Before project deadline DAYS HOURS MINUTES 10 00 00 ☐ Skip Weekends	Select parent job Yes Most recently created by 2 - Verify media In same part Yes In same lang No In same target media No With same tag(s) No ☐ Match tag(s)	Default person Apply criteria Criteria ☒ Job type ☒ Target language ☒ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language tag(s) Match people filter Match tag(s) Prioritise users with tag Priority Shark Tank No ☐ Don't assign (just save criteria)
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Rule 4 - Subtitle template proofing

Once the template is created, it will be reviewed by the Project manager to ensure no errors are inherited down to all the subsequent languages. This is of course done in the Online editor.

- Note that the Parent job section includes "In same lang".

- We are now working within a specific language until the template is completely done.
- There is one important difference between this job and the first, which can be found by going to "Advanced edit".
 - The "Proofing-type" option will allow the reviewer to mark the job as "Not approved" when changing status after the proofing is completed.
 - Doing this will reopen the previous job and allow the template creator to make (or confirm) any necessary changes.
 - This is a good example of how a simple adjustment to a joblist template rule will have a major impact on all the workflows created by it. Note: If an important omission like this is found after a project has been launched, you would typically change the live projects using batch editing and edit the joblist template to ensure that future projects are correctly set up.

4 - Proofing (PM Template QC) - Verify that first template is ready for subse...

[Remove rule](#) [Advanced Edit](#)

Rule explanation

Proofing job assigned based on criteria.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☒ First(s) ☐ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag 	Job options Job type Proofing Custom label PM Template QC Comment / description Verify that first template is ready for subsequent translations. Tag 	Job options Delivery method Online editor (NuTXT-W) Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 8 3 10	Select parent job Yes Most recently created by 3 - Template creation In same part Yes In same lang Yes In same target media No	Default person Current project manage Criteria ☐ Job type ☐ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language tag(s) Match people filter
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Advanced Edit

[General](#) [Editor settings](#) [Casti](#)

Online editing/review settings

Proofing-type

Rule 5 - Subtitling from a template

Here is where the work from the Template creation steps pay off.

- The Jobs are added to "General target languages"
 - These are languages attached to the project which are neither "First" nor "Internal".
- Since we are now expanding into multiple languages from the "First" language, "In same lang" is once again set to "No" when mapping the Parent job.
- There are also a couple of "Advanced edit" settings which are vital here:
 - "Load template" makes sure that when subtitlers go to work, the timed template from the previous step is automatically loaded into the editor.
 - "Limit editing" prevents the translator from some editing, such as changing the timing and adding clips.
 - This is used for projects where it is important that all translations follow a consistent structure.

5 - Subtitling from template - Create translation based on template. Change ...

Remove ruleAdvanced Edit

Rule explanation

Second translation. Job is set to "Load template" to automatically load the first translation (from parent job) as a template as a first step.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☐ First(s) ☒ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag ☐ If company has tag ☐ If project has tag Split into target media No Split into tags No ☐ Repeat job for each matching user

board Projects People Calendar

Advanced Edit

General Editor settings Cast

Online editing/review settings

👁 Proofing-type

No ▼

Online editing settings

📄 Load template

Yes ▼

🕒 Automatic time-out

15 minutes ▼

🚫 Limit editing

Yes ▼

Rule 6 - Subtitling proofing

Just like the timed template, the translated subtitles require proofing. The options should be familiar by now.

6 - Proofing - Subtitle QC in online editor. Add changes or...
Remove rule
Advanced Edit

Rule explanation
Proofing job. Simplified editing mode and menus.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☐ First(s) ☒ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag 	Job options Job type Proofing Custom label Custom label Comment / description Subtitle QC in online editor. Add changes or comments on subtitle level. If job needs additional work by Tag 	Job options Delivery method Online editor (NuTXT-W Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 	Select parent job Yes Most recently created by 5 - Subtitling from temp In same part Yes In same lang Yes In same target media No	Default person Apply criteria Criteria ☒ Job type ☒ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language tag(s) Match people filter
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Rule 7 - Additional proofing?

This rule is **conditional**; it will only be applied for certain languages, the ones with a specific tag. This tag would be added to the **target language for the project** and in this case tells the joblist template that the language requires additional work.

7 - Proofing (Extra QC)
Remove rule
Advanced Edit

Rule explanation
Only added if target lang has a certain tag

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☐ First(s) ☒ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag Language: extra QC x	Job options Job type Proofing Custom label Extra QC Comment / description Comment / description	Job options Delivery method Online editor (NuTXT-W Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 	Select parent job Yes Most recently created by — N/A — In same part Yes In same lang Yes In same target media	Default person Apply criteria Criteria ☒ Job type ☒ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language
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Rule 8 - Client verification?

Another conditional rule, this one using a tag to the **main project data**. If found, extra jobs will be added to *all* languages.
Explanation: the jobs are added to the *language* nodes, but only if the *project* has the tag.

The assignee here is the the Client contact. There can only be one of these for a project, so the selection logic is simple.

8 - Client verification
Remove rule
Advanced Edit

Rule explanation
Only add if project has a certain tag. Will be assigned to Client contact, with Quicklink option on for further sharing.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☐ First(s) ☒ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag ☐ If company has tag ☒ If project has tag Tag Project: Client review	Job options Job type (Custom Label) Custom label Client verification Comment / description Comment / description Tag	Job options Delivery method Online editor (NuTXT-W) Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 44 18 52 ☐ Skip Weekends	Select parent job Yes Most recently created by — N/A — In same part Yes In same lang Yes In same target media No With same tag(s) No ☐ Match tag(s)	Default person Current client contact Criteria ☐ Job type ☐ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language tag(s) Match people filter Match tag(s)
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Rule 9 - Render and delivery

The final job in this example is also a manual one. Using the localizations created (and proofed) using the online tools, the Project manager creates deliverables and ensures they end up in the right place.

The Delivery method is the simple one: "Report". This simply places a button on the Dashboard which the assignee simply clicks to change status to "Done" and thus report that this step is completed.

9 - Render and deliver
Remove rule
Advanced Edit

Rule explanation
Adds render jobs for all target media for the different target languages (both first and second). Thus, no rule should be specified for selecting parent job.

Add job(s) to ☐ Project ☐ Parts ☒ Langs ☒ First(s) ☒ General target(s) ☐ Internal(s) ☐ If language has no tags If language has tag If language has not tag	Job options Job type (Custom Label) Custom label Render and deliver Comment / description Comment / description Tag	Job options Delivery method Report Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 56 4 15 ☐ Skip Weekends	Select parent job Yes Most recently created by — N/A — In same part Yes In same lang Yes In same target media No	Default person Current project manager Criteria ☐ Job type ☐ Target language ☐ Source language ☐ Project client keyword ☐ Project general keyword ☐ Order client company ☐ Match project tag(s) ☐ Match target language tag(s) Match people filter
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Summary

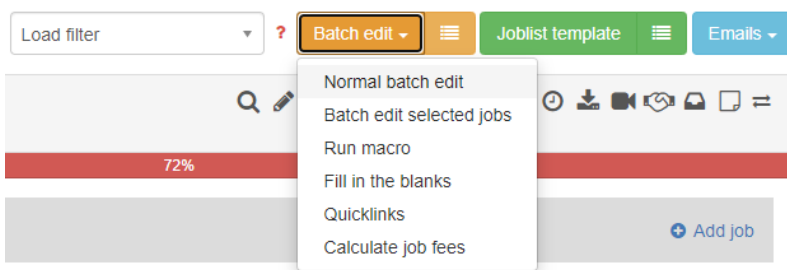
The above examples are just this: examples. They are meant to provide ideas based on real-life workflows. Workflows can be even simpler, or much more advanced. The best way to learn these tools is to try them out.

Batch editing joblists

Once a joblist is created, powerful batch editing tools allow you to apply changes to multiple jobs. Any setting you can apply to a job can be applied to many. With a joblist for a project open, select "Batch edit" to see the options.

- Normal batch edit
 - With "normal" batch editing, you first need to select which jobs to change. This is done in the top section.
 - You can click "Open job list" to see exactly which ones would be affected by the current options.
- Batch edit selected jobs
 - With this mode, you filter the joblist *first*. You can then apply a batch edit to the selected/visible ones. Saving joblist filters is especially handy for this kind of work, if you find yourself often applying the same type of change to a certain kind of job. For example a specific target language and job type.
- Run Macro
 - Macros are also applied to all visible/selected jobs. You can create new macros when batch editing.
- Fill in the blanks
 - This special feature is used for one thing: to assign people to an existing joblist. It takes another look at every unassigned job, and its criteria, and tries to select a user. This is typically done after makes some changes in the user database under People, giving the system a better chances to find the right person for the job.
- Quicklinks
 - Quickly create quicklinks for all visible jobs in the joblist
- Calculate job fees
 - Use a Resource matrix to quickly fill in Custom job fees for all visible jobs in the joblist
 - Or specify a custom fee per unit for all visible jobs

Entering batch edit mode from a joblist



Batch editing in "normal" mode: first select which jobs to affect.

Filter jobs

Part number

Confirmation status

Label

Comment contains

Language

Swedish ✕

Status

Parent job ID

Delivery date contains (e.g. "2015-05")

Job type

Delivery method

File upload ✕

Assigned to

Shark Tank

— N/A —

Open job list

Reset filters

Select what to change. Fields and options left alone will remain unaffected. Confirm by clicking "Batch".

Batch edit

Save as macro

Batch

Cancel

General

Editor settings

Casting

Job Fee

File settings

Confirmation status

Awaiting confirmation

Do not change

Awaiting confirmation

Confirmed

Preliminary

Denied

Confirmation deadline (hours) ?

Decline / no reply

Do not change

Delivery method

Do not change

Job type

Do not change

Resources / People

In order to assign work, you need users with the right skills. Information about user expertise is managed under **People** and can be used as automatic [assignment criteria](#).

The most common login type in Plint is typically a **Resource**, as in the example below. These are the users who perform individual jobs without needing access to the complete project. In short, they only see what is relevant to complete a certain *job*. However, *Client*, *Manager* and *Workbench* users can also be assigned jobs based on the same properties and data.

The People edit forms

Like Projects, People can be created or edited using one of two forms. The simple form shown below is often sufficient, and includes:

- *Name* and contact information
- *Email* (also used as login name)
- *Status*
 - Setting this to *Inactive* will prevent the user from logging in, automatically getting assigned jobs or receiving any system emails
- *Priority* is a simple switch used to prioritize users when multiple ones are eligible for a job.
 - The lower the number, the higher up in the list the user gets
 - It can also be used as basic criteria: i.e. only users with a certain Priority level are eligible.
- *Job types*
 - Any job type from *Tools & Data / Job types* can be selected for any user
 - These are commonly used as assignment criteria for jobs
- *Vendor / Internal/External*
 - These options do *not* change system behaviour but can be used to categorize users
- *General keywords*, such as genres and areas of interest can be used as assignment criteria for jobs
- The same goes for *Client keywords*, which are typically used to specify that a resource is well versed in the terminology and requirements of a specific client.
 - Please note that this is different from *Client company*
 - Client company should only be specified if the Resource is dedicated for work for that company, [as explained here](#)
- *Source* and *Target languages* are also commonly used as assignment criteria
- Invoicing options are used to help calculate job fees in a relevant currency

Note that the **jobs** determine which requirements are relevant. Sometimes, only the right *Job type* is needed to be eligible for a job. This means that there is no risk of adding "too much information" about the users themselves. On the contrary.

New user

Save

Cancel

First & last name (required)

Sven Svensson

E-mail (required)

sven.svensson@plintdocs.com

Status

Active

Priority

2

Tag

Job types

Subtitling from template

Proofing

Vendor (required)

No

Internal / External (required)

External

General keywords

Cooking

Crime

Client keywords

Sample Corporation Inc

Comment

Owns an actual unicorn.

Login type ?

Resource

Client company

— N/A —

Access invoicer

No

Add price group

EUR - Standard

Activation Date



Add

Price Groups

No price groups selected

Source languages

English*

Target languages

Swedish*

Assigning work to the right person

A key aspect of workflow management in Plint is ensuring that the minimal amount of time is spent assigning work to the right person or vendor. To this end, there is an array of options called "Job assignment criteria", all based on the concept "match user data with job data". In short, [users are categorised with different data](#), which can be matched against data from the job, or the whole project.

A simple example might be: For all subtitling jobs in Project A, automatically select users who have the same **target language** as well as the **job type** "Subtitling".

A more refined example might include the requirement that the users also have the same genre **keyword** as the *project* and perhaps a special **tag**.

These criteria, like all job options, can be configured for individual jobs, batch edited for multiple jobs and pre-set for the jobs that are created using joblist templates.

Available criteria

- Target language
- Source language
- Job type
 - Note: The three criteria above can also be combined into [Skill sets](#).
- Keywords
- Tags
- Priority (a simple 1-5 ordering list)

Prioritising matching users

If multiple matching users are found, the **Priority** setting on user level will automatically come into play, selecting the user with the lowest value first. **Tags** can also be used to prioritise users. These settings create a "soft" filter that determines who is selected *first*, but without excluding others completely. Others will still be *available* when criteria are applied (see below).

Avoiding incorrect assignment with Conflicting job types

[New: Nov 2024]

In order to avoid a situation where the same user is assigned, for example, both Subtitling and Proofing on the same file, you can use the Conflicting jobs feature.

- First, go to Tools & Data / Job types to configure which job types are "in conflict".
 - For example "Subtitling from template" could be set to conflict with "Full QC", depending on which job types are in your system.
- With Job tank:
 - When a user tries to self-assign a job in the Job tank, the system will check if they have a conflicting job in the **same node** (e.g. same part and target language). In this case, the user will be notified with an alert and the job will not be assigned to them.
- With "Find random matching user":
 - If a job is set to be offered to a "random matching user" on decline (or failure to confirm), the rule will also be applied. A user with a conflicting job will automatically be excluded.

Applying the criteria in practice

There are several ways these criteria are applied. The most obvious way is that the dropdown "Assigned to" is filtered in real time as criteria are added or removed from a single job in edit mode (see picture below). The list here always reflects which users match all the requirements.

The criteria will determine which jobs are shown to a user in the [Shark tank](#) (if this function is enabled), and which ones will be notified about available jobs.

If a job has the "User can reassign" option, the criteria will decide who the job can be reassigned to by the current user.

When a [joblist template](#) is applied, the settings for the created jobs can automatically be used to pre-assign users. The used criteria will also be stored along with the job, for future reference and use.

The great exception: client company excludes users from work for other clients

There is one major factor that will trump all criteria: if a user is linked to a **client company**, they will not be available for jobs on project for other companies. Linking a user to a Client company should, in short, only be used where suitable: typically when a major client wants to ensure that an in-house resource of theirs is assigned certain jobs in workflows on projects for them.

Overriding criteria

Anyone with editing access to jobs (such as a project manager fine-tuning a project) can always assign basically anyone, by simply searching on user name in the "Name search" dropdown. This will automatically ignore all other rules, even the "Client company" rule.

The assignment rules as shown when editing a single job. All criteria that are available for a specific job can also be set in a joblist templates, ensuring that all jobs in a certain workflow follow

the same rules.

Assigned to

Example LSP Inc (Currently Assigned) ▾

Name search (overrides all criteria)

Name search (overrides all criteria)

Shark Tank

No ▴ ▾

User can reassign

No ▴ ▾

Assign Criteria

Apply criteria ▴ ▾

Criteria

Job type × Target language ×

Source language ×

Prioritise users with tag

Tier 1 ×

Priority

Assigning work using Skill sets

In order to provide more precision when assigning users to jobs, Skill sets were introduced in Plint Core in late 2022.

How it works

Skill sets are a combination of **Source language**, **Target language** and **Job type**. These criteria have always been available as separate properties when matching people to jobs, but the standard implementation is a "mix-and-match" solution where these properties can be combined freely.

Using Standard criteria

User A has two target languages, two source languages and three job types. This makes for twelve possible combinations. There is no way to specify that User A can only do a certain job type in a specific language combination.

Using Skill sets

With Skill sets, you specify a combination of these three criteria, e.g. "Subtitling into Swedish from English". When a job requires the user to match all three criteria, the user needs a skill set with all three.

Example of user with four skill sets. The fourth one has English as the target language. With standard data, it would be impossible to add English for this specific job type without also making the user eligible for other job types into English.

Skill sets			
Source languages	Target languages	Job types	Status
English	Swedish	Subtitling from template	approved
English	Swedish	Subtitle creation	approved
English	Swedish	Spot QC	approved
English	English	Subtitle management	approved

How to activate Skill sets

This is done on project level, using the "Assignment logic" dropdown. Setting this to "Skill sets" will affect *all* jobs on the project with criteria which include Source language, Target language and Job type.

Plint

Dashboard

Projects

People

Calendar

Inbox 8

Help 0/0

Plugins

Tools & data

Search

Editing project Currency conversion

Save

Cancel

Project details & description

Input

Output

Price & internal information

Target specification

Metadata

Project title (required)

Skill set project

Client keyword

— N/A —

General keywords

— N/A —

Status

New order

Project manager

Limited project manager

Delivery date

Delivery date

Delivery time

12:00

Client company

— N/A —

Client contact

— N/A —

Content type

— N/A —

Project category

— N/A —

Project type

— N/A —

Parent Project

— N/A —

Preliminary project?

No

Template project?

No

Project Forum?

Yes

Production

— N/A —

Disable contact PM?

No

Assignment logic

Skill sets

How to add Skill sets to users

This is done on the Languages tab when editing user information.

Login & user details

Contact information

Resource information

Miscellaneous

Feedback (0)

Notifications

Languages

Roles & Permissions

Native languages

Source languages

English*

With script

Target languages

Swedish*

☐ Show only active languages

Active languages marked by *.

SkillSets

Source	Target	Job types	Status	
English*	Swedish*	Subtitling from template	approved	
English*	Swedish*	Subtitle creation	approved	
English*	Swedish*	Spot QC	approved	
English*	English*	Subtitle management	approved	
+ Add skill set				

Applying criteria with Skill sets

As always, the rules dictating who can do a certain job reside on Job level. In the example below, eligible users would need a skill set with the same **Job type** and **Target language** as the job. Note that this job does not include *Source language* among the criteria. This is perfectly possible and allows you to determine how specific you want to be.

Assigned to

None

Name search (overrides all criteria)

Name search (overrides all criteria)

Job Tank

Yes

User can reassign

No

Assign Criteria

Apply criteria

Criteria

Job type × Target language ×

Prioritise users with tag

Priority

1 × 2 × 3 ×

Finding people based on Skill sets

When filtering users under **People**, select the "Skill sets" option and set it to Yes. This will affect three other filter criteria: Source language, Target language and User job type. Searching for this kind of data will now be confined to Skill sets.

Please note that you cannot search for *multiple* languages or job types when using the Skill sets option.

The logic is the same as when you apply the assignment criteria: omit a field to make a "wildcard" search. For example, search only on Target language and User job type. This will ignore the Source language factor and thus give you more results.

Filter users

Include

Select fields:

Target language x

Skill sets x

User Job types x

Target language

Swedish x

Skill sets ⓘ

Yes ▼

User Job types

Subtitling from template x

The Shark tank / a.k.a. Job tank

When several users may be right for a job and your main concern is just to get it done, you can "throw the job in the Shark tank". This is a setting on job level that means that any eligible user can "grab it". It works like this (using a single job as example):

Assigned to

None

Name search (overrides all criteria)

Name search (overrides all criteria)

Shark Tank

Yes

User can reassign

No

Assign Criteria

Apply criteria

Criteria

Target language × Job type ×

- Specify or check the [Assignment criteria](#) of the job
 - Are they too generous? Or are there too *few* eligible users?
 - Tip: You can open the "Assigned to" dropdown to see all matching users.
- Set the job to "Shark tank".
- Optionally: use the [notification option](#) to notify all matching users.

That's it. Now all matching users can see the job and self-assign it. This will effectively remove it from the Shark tank for all other users, since only unassigned jobs are shown here.

From the user's point of view it looks like this ([more info here](#)):

Your jobs (8)

Shark Tank (1)

Example subtitling project
ID: 1

Status	ID	Title	Part	Language	Delivery date	
In process	6	Subtitling from template	1 (Part 1)	Swedish	2020-03-29 03:03	Grab

These settings can of course also be [batch edited](#) or applied right from the start using [Joblist templates](#).

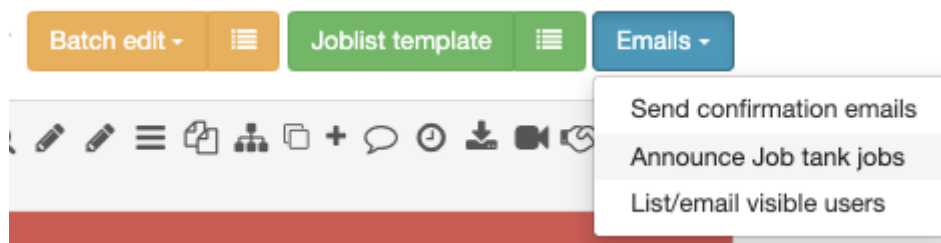
Job tank 2.0 (API)

As of 2023, there is also API support for the Job tank, but this implementation works somewhat differently from the classic job tank:

- Instead of relaying on real-time checks comparing user data against the job criteria, jobs are actually placed in a list. This list contains a reference to matching users and Job ids.
 - This greatly improves performance and traceability.
- Populating the list is done by *announcing* job tank jobs from the joblist (see below).
 - Sending out email notifications (the green buttons) now have the added benefit of populating Job tank 2.0.
 - You can also populate the job tank without sending emails (blue button).
 - All jobs which are set to Job tank = yes and *not* assigned will be added, based on the assignment criteria and user data at that time.
 - This means that changing the criteria or adding new users with matching data after this point will not automatically result in new job offers in the tank. You need to use the announcement function again.
- Conversely, in order to remove jobs from the tank, you can:
 - User the "Clear job tank" option in the same dialogue to clear all offers from the specific project.
 - Or, if your user settings allow, go to Tools & Data / Job tank. This page shows all available job offers. You can filter out a selected group of jobs and delete all of them at once.

(Please note that the Job tank tab on the classic Plint Dashboard still uses the real-time logic, as described above.)

Announcing job tank jobs from the joblist



Announce Job tank jobs

New jobs only

All unassigned job tank jobs

Fill Job tank 2.0 without sending emails

Clear job tank

Close

Filtering and batch deleting job offers under Tools & Data / Job tank

Dashboard / Tools & data / Job tank

Filter

Filter jobs

Project name

Project name

User

Example Freelancer (SE)
Example Freelancer II (DK)
Example Freelancer II (NO)
Example Freelancer II (SE)
Example LSP Inc

Creation date (from)

yyyy-mm-dd

Delivery date (from)

yyyy-mm-dd

Project manager

None

Job type

Full QC
Media upload
Spot QC
Subtitle creation

Creation date (to)

yyyy-mm-dd

Delivery date (to)

yyyy-mm-dd

Target language

Arabic
Danish
English
French (France)

Apply filters

Clear filters

Found 2 records

Delete job offers

Job ID	Project name	Job title	Lang	Part	Users	Placed in job tank	
1858	The skill set project	Full QC	da	1	1	2023-05-23 09:18:22	
1866	The skill set project	Full QC	da	2	1	2023-05-23 09:18:22	

Job visibility logic

The Dashboard shows jobs that are assigned to the currently logged in user. This is true for any user type. The following logic is useful to understand.

- The default Dashboard setting is to show only jobs that are open for work.
 - That is, the *parent job* is **Done**.
 - and the job itself is either **In process** or **Awaiting corrections**.
- Jobs that are **Awaiting confirmation** are *always* visible.
 - Regardless of whether a job can be started yet, it will be shown on the Dashboard if the user needs to confirm that they accept the assignment.
- The user may also filter their Dashboard to show the information most relevant to them, for example by:
 - Showing *all* jobs on their Dashboard (including those not yet ready for work).
 - Showing only jobs linked to a certain project.
- Completed work is visible in the **Job archive**.
 - This page is found under the account menu in the top right corner.

Preliminary jobs

A job may be assigned and ready for work but set to **Preliminary**. In this case, it will not be visible to the assigned user. The purpose is to let a project manager verify and fine-tune all job assignments before requesting job confirmations.

Dashboard of a Resource user showing two jobs: one which is ready for work and three jobs that needs to be confirmed.

Your jobs (4)

Job filter

Only ready

Project filter ⓘ

All

Ordering

— N/A —

You have 1 jobs that are past due.

Select all jobs awaiting confirmation

Reply selected jobs

A Sunny Day in Projectville

ID: 8



☐	Status	ID	Title	Part	Language	Delivery date	
☐	In process	123	Second translation	2	English	N/A	Reply
☐	In process	131	Second translation	3	English	N/A	Reply
☐	In process	134	First translation	3	Norwegian	N/A	Reply

Trailers - demo project

ID: 12



☐	Status	ID	Title	Part	Language	Delivery date	
☐	In process	284	First translation	2 (Vertigo)	English	2019-12-05 00:00 CET	Go to work

Quicklinks (accessing a job without logging in)

There are times when you need to outsource a job to someone who is not a registered user in the system. This can be accomplished with **Quicklinks**, an additional feature only available for online editing jobs.

A quicklink consists of the URL to the job in question along with a token. This link can be emailed or communicated to any, such as a client contact or external consultant for final review. The token, if valid and not expired, allows the user to open the job without logging in.

Please note that the link only works for this specific job and will not include access to the *Dashboard* or even the Job information page. All information necessary to complete the job needs to be available in the editor (for example in the form of the job description) or made available through other means.

Creating quicklinks

From the job itself

- If the job settings allow it, any user with access to a job can create a quicklink to it from the editor.
 - This option is enabled for a job on the "Editor settings" tab: *Allow use of Quicklink*
- The *Quicklink* button opens a dialogue where existing quicklinks are shown and can be shared/emailed, or new links created.

The screenshot shows the 'Editor settings' tab selected in a top navigation bar. Below the tabs, the 'Online editing/review settings' section is visible. Under 'Editing Mode', three radio buttons are present: 'Standard' (selected), 'Limited', and 'Review'. Below this, a note states: '"Review mode" only affects Subtitled, if OE is entered in this mode it will be the same as "Limited mode" in'. Further down, there are two dropdown menus: 'Proofing-type' (set to 'No') and 'Text translation mode' (set to 'No'). At the bottom, the 'Online editing settings' section contains two more dropdown menus: 'Load template' (set to 'No') and 'Allow use of Quicklink' (set to 'Yes').

Using the function from within Plint Subtitled

JOB: verity media

Status: In process

Part: 2

Video framerate: 29.97

Project framerate: 25

Media content encrypted: No

Comment:

Check that media is visible in the editor.

Home

Job Info

Change Status

Tools

Quicklink

Reset Job

Share job link



By sharing this link, you can give a user without an account in the system access to this job. Paste the link into a message in your email client, or enter an email address below to send the link directly to any recipient.

Please note that quicklinks have an expiry date (normally 60 days after creation). After this date, a new link will have to be generated.

Enabled

Disabled

Expired

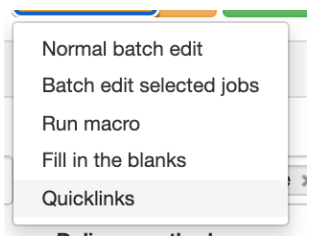
No links found.

Create new Quicklink

Cancel

From the joblist

- A project manager can create quicklinks for multiple jobs in the following way.
 - Go to the Joblist
 - Open the *Batch edit* menu
 - Select *Quicklinks* and follow the instructions
 - From this dialogue, you can copy the list and, for example, distribute it by email.
- Tip! If the links are already created, you can show selected links by filtering the joblist first (for example on target language or part.)
 - When you open the Quicklinks dialogue, only the existing links for the matching jobs will be shown.



Quicklinks

Quicklinks provide access to a single job to a user who is not logged into the system. If there are any quicklinks for the selected jobs, they will be shown below.

Actions

Allow duplicates

Create

Show columns

Part

Part label

Language

OE link

Subtitler link

Expires

Copy list to clipboard

Refresh expiration dates

☒	Part	Part label	Language	OE link	Subtitler link	Expires
☒	1		Norwegian	https://nu.plint.com/editor/902902?token=L74XcKZ5KACnXh8wd56xZvVftUZBtR3rUVDKTHGb	https://nu.plint.com/nutxt-web/902902?token=L74XcKZ5KACnXh8wd56xZvVftUZBtR3rUVDKTHGb	2021-04-13 14:39:47
☒	2		Norwegian	https://nu.plint.com/editor/902915?token=wt8dPw5xsjPe9N2D1NQmb3Glt5pROEAws7cnQ74G	https://nu.plint.com/nutxt-web/902915?token=wt8dPw5xsjPe9N2D1NQmb3Glt5pROEAws7cnQ74G	2021-04-13 14:39:47

Close

More on quicklinks

- To retract access to the job through a quicklink, the link itself can be removed or disabled. The easiest way, however, is to change the job setting, setting "Allow use of quicklinks" to No.
- Normal job access logic also applies to quicklinks. This means that if a job is Done, or its parent job is *not* done, the quicklink will not work.
 - This is to prevent someone from opening a job prematurely, or too late. Since the link is the user's only means of access to the system, they otherwise have no way of knowing if it's open for work.
- Finally, if a job is already opened by someone else, the system will prevent other users from accessing it through a quicklink.
 - If someone forgets to close/pause a job, they will be automatically sent to the Pause page or Dashboard after a while to prevent a job being stuck in "limbo".