

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 000 ☐ 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 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 Match tag(s) Prioritise users with tag Priority Shark Tank No ☐ Don't assign (just save criteria)
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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	Job options	Job options	Select parent job	Default person
☐ 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 type Proofing Custom label PM Template QC Comment / description Verify that first template is ready for subsequent translations. Tag 	Delivery method Online editor (NuTXT-W) Confirmation status Confirmed Job delivery date DAYS HOURS MINUTES 8 3 10	Yes Most recently created by 3 - Template creation In same part Yes In same lang Yes In same target media No	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

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.

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