

## QUICK START GUIDE

2023/R1 New Features

# Enhanced Time sheets

Time sheets now allow the ability to track material in addition to time. In fact, both can be tracked together.

The tracking of time has been improved with the ability to round to a set minimum interval with 1 (bill by the minute) as a starting interval. Your set minimum interval determines the rounding to be applied to the calculated duration, which becomes the corrected effort.

Note: Rounding will not occur if the maximum hour value is exceeded.

Billing code	Date In	_	Time In	
Digital Design 🗸 🗸	09-05-2023	Ê	01:08 pm	0
Corrected effort	Date Out		Time Out	
lours Minutes	09-05-2023	Ê	01:19 pm	0
Description				
Internal Review				



## Hold Task

This feature allows you to pause a workflow at its active step if there is a need to add a reviewer who was missed in a previous step. While on hold, the tasks cannot be opened. Once the missed reviewer completes their review, the held tasks can be released manually or automatically per the release date.

To put a task on hold, navigate to Project Details  $\rightarrow$  Tasks and select the task(s)  $\blacksquare$ . Click "Hold Selected". You can select one, several, or all tasks at a step to put on hold.

📜 Tasks 1	iming			0 0 1	💿 🔄 Tasks Status	
🗬 Add Task					Show done Task Hold Selected Delete Selec	Filter 👻
Confl	ct To		Expiration date	Pending files	Task label	D
07/14/2023						
	N	/le	Pending ends in 3 day(s)		Internal Review Proofs : #1,2,3,4,5,6,7,8,9,10,11,12,13	

To enter an optional release date in the confirmation popup, click 📰 to pull up the Date/Time picker. If desired, this date can be overridden by manually releasing the task(s) earlier.

If this field is left empty, the task deadline Date/Time will be used for the release date.

Hold selected Tasks?
Are you sure you want to hold the selected tasks? You can set a release date using the optional field below.
Release date     Enter a date
Yes

**IMPORTANT:** regardless what the release date is set to, the orange "On Hold" label will display the task deadline date. If the task on hold expires, the task will change status from on hold to expired. With the task expiration date within the hold label, the person who held the task can easily see if the task deadline needs to be extended.

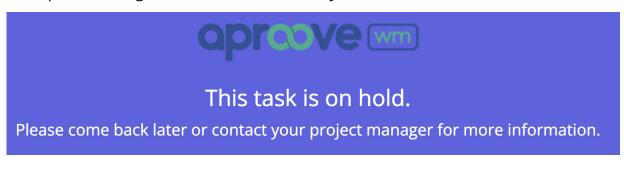
<b>∞</b> 6 /	Add Task					Show done Task Filter 💌
	Con	То	Expiration date	Pending files	Task lab	Internal Review Start my Task X
Yesterda	ay					
					Internal Revie Proofs : #1	Pending In progress Done
		JR	On ends in 2 Hold day(s)	No filos	Internal Revie Proofs : #1	e Sent : 07-21-2023 06:00 PM (UTC-04:00) Expires : 07-24-2023 10:00 AM (UTC-04:00)
			Pending ends in 2 day(s)			Internal Review <sup>a</sup> Sample - Customer Review Click to download -

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#### Accessibility

A task on hold will present as such in the User Dashboard:

- Tasks Dashboard hidden from the Tasks List.
- Project Details → Tasks visible, but cannot be opened. The user will receive an explicit message that the task is currently on hold.



To prompt the release confirmation popup, do one of the following:

- 1. Select the task(s) and click "Release Selected".
- 2. Click on the orange expiration date label

📃 Tasks Tim	ing		💿 💿 🕦 💿 🛛 💿 Tasks Status	$\bigcirc \bigcirc $
K Add Task			Show done Task Release Selected Delete Selected	Filter 💌
Conflict	То	Expiration date	Task label	Pending files D
Today				
	Me🌣	On ends in 3 Hold day(s)	Sample - Internal Review Proofs : #1	

1. When the task(s) is released, an email task invitation will be sent.



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# Bulk Contact Import

The process of inputting many contacts one at a time into a form field can be very time-consuming. This feature makes that endeavor much easier. It is dependent on two conditions:

- 1. More than just a few contacts require entry
- 2. The list of contacts is made available to the project creator (typically in an Excel spreadsheet) prior to project creation.

Demo - Contact Bulk Import			
	Start Date	Deadline Date	
Marketing Test Project PDF	11-01-2023 02:00 PN	11-16-2024 02:00 PN	
Marketing Project	t Creation Form		
Marketing Project	t Creation Form	tional Reviewers	Optional
0 1		tional Reviewers	Optional
0 1	Marketing Reviewers Opt		Ē

Click the bulk contact import icon 📑 in the form field to load the "Import Contact" window.

**Note:** if **i**s not clickable, that form field is not configured for bulk contact import.

Import contact	×
Import contacts with email addresses (use line break, "," or ";" to separate email addresses)	
Email O Login	2
	Cancel

Copy the bulk list of either user logins or email addresses and paste them into the import window. List items can be separated by a comma, semi-colon, or line feed (copied/pasted from an Excel sheet).

**Note:** to select all email addresses in the column of an Excel file, click on the column header.

А	В	С
Name	Email	Phone
Jeff Ross	jr@aproove.com	1-828-871-0824
India Pennington	quis@client.com	1-515-585-2857
Tarik Mueller	nibh.enim@client.com	1-214-614-1881
Nerea Carroll	gravida@client.com	1-743-865-2975
Devin Bonner	magna@client.com	1-826-815-1258
Murphy Sloan	est@client.com	1-508-227-3368
Porter Holland	nonummy@client.com	1-649 560-5338
Iola Mccullough	fringilla@client.com	1-758-582-2480
Wynter Booker	suspendisse@@client.com	1-182-119-1473
Carla Sanders	et.pede@@client.com	1-632-726-4776

Once the email addresses are pasted in, click "Submit".

Import contact	×
Import contacts with email addresses (use line break, "," or ";" to separate email addresses) jr@aproove.com quis@client.com nibh.enim@client.com gravida@client.com magna@client.com est@client.com ponummv@client.com	-
Email C Login           Submit         Back	Cancel

Email addresses linked to a user with a login will load that licensed user as seen below for jr@aproove.com. A non-existing contact will load as a guest and be added to the user address book.

Select "Import only existing contacts" to import only those contacts in the user or system address book.

Im	port c	ontact					×
	Import only existing contacts						
<	Id	User id	Login	Email	Firstname	Lastname	
	127	71	jr@aproove.com	jr@aproove.com	Jeff	Ross	
<	0	0		quis@client.com			
~	0	0		nibh.enim@client.com			
<b>~</b>	0	0		gravida@client.com			
~	0	0		magna@client.com			
Im	nport	Back					Cancel

Click "Import" to add the list of contacts to the form field.

PBL_Creative_key		
Marketing Reviewers Required *	Marketing Reviewers Optional	Reviewers Optional
Leff Ross ×	E	E
L quis@client.com ×		
≗ nibh.enim@client.com ×		
L gravida@client.com ×		
▲ magna@client.com ×		
Lest@client.com ×		
≗ nonummy@client.com ×		
▲ fringilla@client.com ×		

# Additional Proof Tag Filter Options

In Project Plan View, the Proof tag filter now includes options to filter on proofs with no proof tag or any proof tag. More than one filter can be applied at once.

**Note:** there must be at least one proof with a proof tag for this filter to appear.

