

Design Requests

Submitting design proposals are a core Trademark InSight feature. The design requests are managed from a single and centralized design submission center which includes advanced records search, dynamic routings and workflows for design requests, configurable metadata definitions, and a variety of virtual mark-up, editing, and commenting tools.

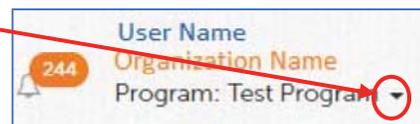
In order to access this component, follow this route:



When this item is selected the system shows the design submission center screen.

The design InSight requests are managed per program. For users who have more than one associated program, verify that the appropriate program is selected. To change the program do the following:

- Click on the arrow in the extreme right of the **Program** field located on the right top screen level. The system will display a list of all programs that the user has access to.
- Select the appropriate program from the list.
- Click the **Process** button to accept the program change or click the **Cancel** button to avoid changes in the selected program.



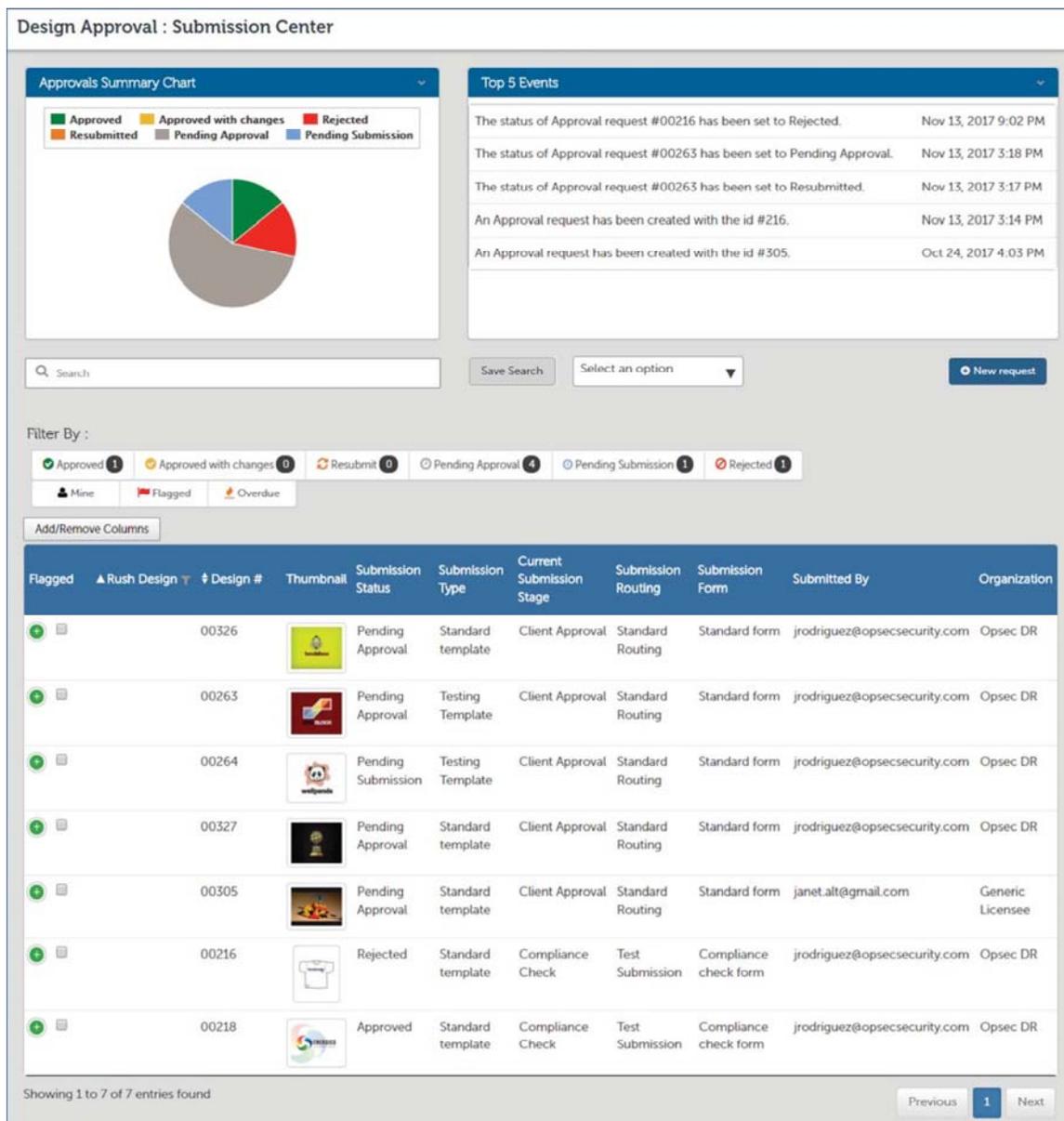


Figure 13.1 - Design Submission Center Screen

Through this item, you will have the possibility to do the following activities:

- Create design request
- Search design request
- Review design request and take actions



Create Design Request

1. Click the **New Request** button. The system will display a screen like next figure.

Design Submission: Approval ID

Submission Stage Version

Submission Detail

Contact Information

Email CC

Submission Information

Submit To Organization Design Name Rush Design No

Submission Types Design Description

Submission Lifecycle

Submission Information

Submission Stage: Submission Stage Required?: Asset Upload Required?: Submission Status:

Submission Design

Upload File

Drag to Upload

Upload Instructions

File Upload
Click the 'Browse' button to find the design on your computer or network. Once you have selected the file, click on 'Begin Upload' to upload it and continue on to the submission details.
Note: Larger files may take some time to upload.

File Prep
Files that have not been created or prepared according to the instructions below may not display, or may only display

Comments Form

Submission Form

Use Saved Forms to Populate
Manage Saved Forms

Figure 13.2 - Create Design Request Screen

- Through the displayed screen, you will be able to complete the required information to submit an artwork for approval. The design submission is classified into four information groups:
 - Submission Detail
 - Submission Lifecycle
 - Submission Design
 - Submission Form
- Some information groups can be hidden or displayed for better screen space management. To hide an information group, click on the arrow in the extreme right of the information group title.



- Click again in the arrow to display the hidden information.

- Submission Detail.** This section is composed by contact and submission information.

Submission Detail

Contact Information

Email: jrodriguez@opsecsecurity.com

CC: email@me.com; email@me.com

Submission Information

Submit To Organization: Select

Design Name: Name

Rush Design: No

Submission Types: Select Submission Type

Design Description: Description

Figure 13.3 - Submission Detail Information - Create Design Request Screen



Procedure to complete contact and submission information:

- 4.1. The default **Email** field corresponds to the user who is creating the design, but can be changed by another email address. This user represents the design primary contact.
- 4.2. Enter in **CC** field the email address of all users who must receive a copy of the email notifying the design submission.
- 4.3. Specify the organization for which the design is being created.
 - 4.3.1. Click on the **Select** button located under the **Submit to Organization** field. The system displays a pop-up with all program organizations.

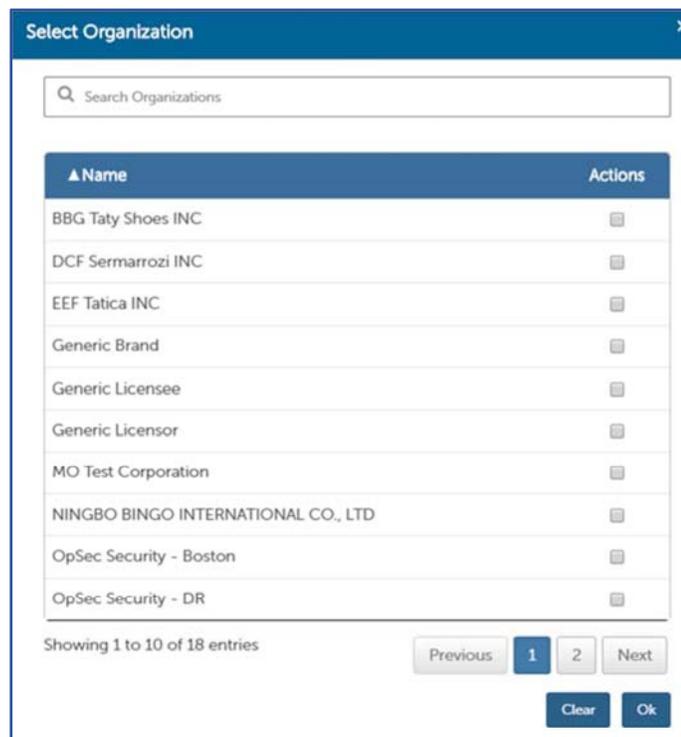


Figure 13.4 - Selecting Submit To Organization

- 4.3.2. If the organization you are looking for is not visible, you can click on the **Search Organization** field and type a character string that matches the organization name that you want to search. When data is entered in this field, the system looks for all organizations whose name match the input character string and displays only records that match it.
- 4.3.3. Select the organization by clicking on the checkbox located in the organization row.

- 4.3.4. Click the **Ok** button to accept the selected organization or click the **Clear** button to clean the selection and exit without selecting any organization.
- 4.4. If the organization has a default submission type, this is preselected in **Submission Types** field. To select the submission type or change the preselected option, click the arrow in the extreme right of the **Submission Types** field and select an option from the list. This list is composed by all submission types related to the previously selected organization.
- 4.5. Enter the design name in the **Design Name** field.
- 4.6. Enter a brief description about the design in the **Design Description** field.



Attention: The **Email**, **Submit to Organization**, **Submission Types**, **Design Name** and **Design Description** fields are required they cannot be left empty.

- 4.7. If you want to alert that the submitted design is a very high priority and you would like it to be prioritized in its review process, turn on the toggle switch under the **Rush Design** label. The system will require a confirmation, click the **Proceed** button to continue or the **Cancel** button to return without mark the design as rush request.
- 5. Submission Lifecycle.** This section is composed by information about the lifecycle defined for the design submission. The submission life cycle information depending on the *Submission Type* selected above and therefore all fields are not editable.

The submission lifecycle is composed by the following columns information:

- 5.1. **Submission Stage.** Name of each submission stage in the order in which they should occur.
- 5.2. **Submission Stage Required?** Show the required status of the *Submission Stage* as defined in the *Submission Type* configuration.
- 5.3. **Asset Upload Required?** Show the required status of the asset upload as defined in the *Submission Type* configuration.
- 5.4. **Submission Status.** Show the current status of each submission stage. Each submission stage will work through the existing submission status (pending submission, pending approval, resubmit, approved, rejected or approved with changes).



Submission Lifecycle

Submission Information

Submission Stage:	Submission Stage Required?:	Asset Upload Required?:	Submission Status:
Brand Approval	Required	Required	Pending Submission
Client Approval	Required	Optional	N/A
Compliance Check	Optional	Optional	N/A

Current submission stage

Figure 13.5 - Submission Lifecycle Information - Create Design Request Screen

6. **Submission Design.** This section is used to upload the artwork file and add comments about the submitted design.

Submission Design

Upload File

Drag to Upload

Upload Instructions

File Upload
Click the 'Browse' button to find the design on your computer or network. Once you have selected the file, click on 'Begin Upload' to upload it and continue on to the submission details. Note: Larger files may take some time to upload

File Prep
Files that have not been created or prepared according to the instructions below may not display, or may only

Comments Form

Leave a comment here

Reply

Figure 13.6 - Submission Design - Create Design Request Screen

6.1. Procedure to upload an artwork:

- 6.1.1. You can add an artwork by dragging and dropping file into the *Upload File* section.
- 6.1.2. Another way to add an artwork is clicking the **Upload File** button. This action will cause a window to be opened, through which the path and image file name is specified.

6.1.3. You can upload any file type, but not all of them are supported in the preview design viewer. The file types supports by legacy system are:

Image/PDF files:

- GIF
- PDF
- JPG
- PNG

Video files:

- AAC
- AVI
- 3GP
- FLV
- MOV
- MP3
- MP4
- MPEG
- OCG
- WAV
- WEBM
- WMA
- WMV



Attention: All other file types can be uploaded and downloaded for review, but cannot be shown in the preview window.

6.1.4. Some file types require to be converted into another viewable file type. This process may take several seconds or minutes. This process does not prevent the design creation. If you want to review the conversion process progress, click on the notifications symbol  located on the right top screen level.

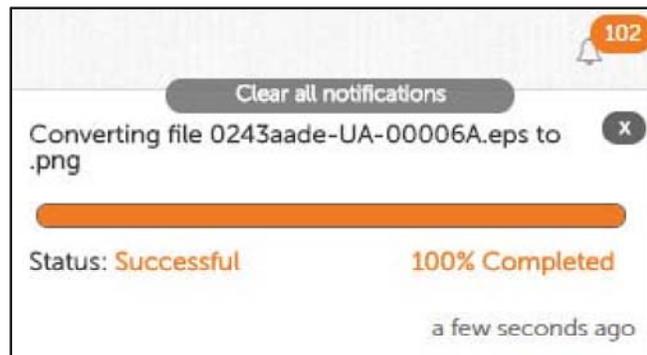


Figure 13.7 - Notification sample

6.1.5. When the upload process finishes, the system shows a preview of your design for the possible file types. See the next figure.



Figure 13.8 - Preview Uploaded Image

6.1.6. Review the design for accuracy. By submitting the design, you are confirming that the image is represented accurately. If the design is not displayed correctly, delete the image by clicking on the wastebasket icon  located at the bottom right of the image preview window. Then upload another image again.

6.2. Procedure to add comments:

6.2.1. Click on the text box and enter the comment.

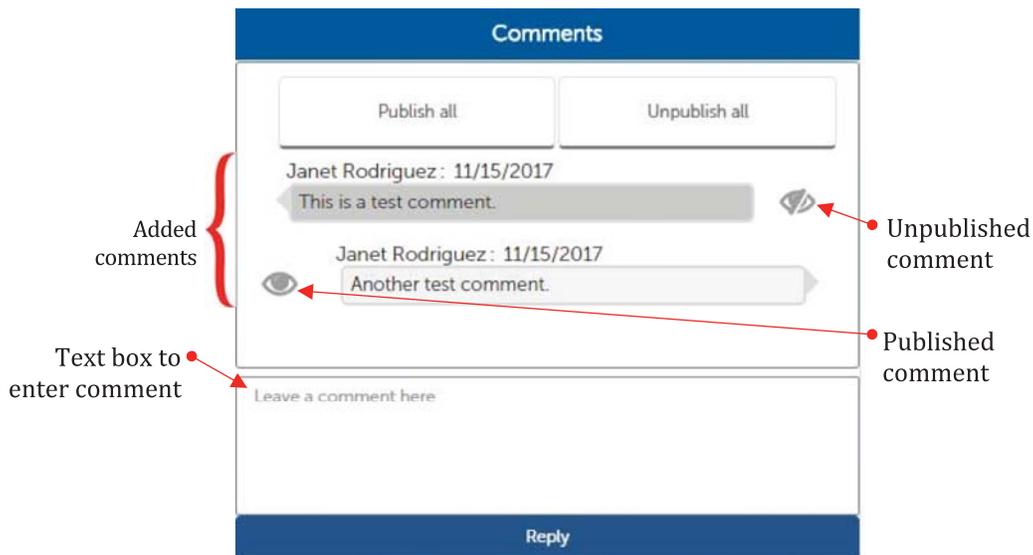


Figure 13.9 - Comments Section - Create Design Request Screen

6.2.2. Click the **Reply** button. The typed comment is added to the comments list.

6.2.3. Posted comments on a design will only be visible between these parties unless they decide to publish the comments to all external parties. To publish a comment, click on the unpublished indicator  next to the comment you want to publish.

7. **Submission Form.** This section is used when the previously selected submission type has related design details to collect additional data about the design. Procedure to complete the details information:

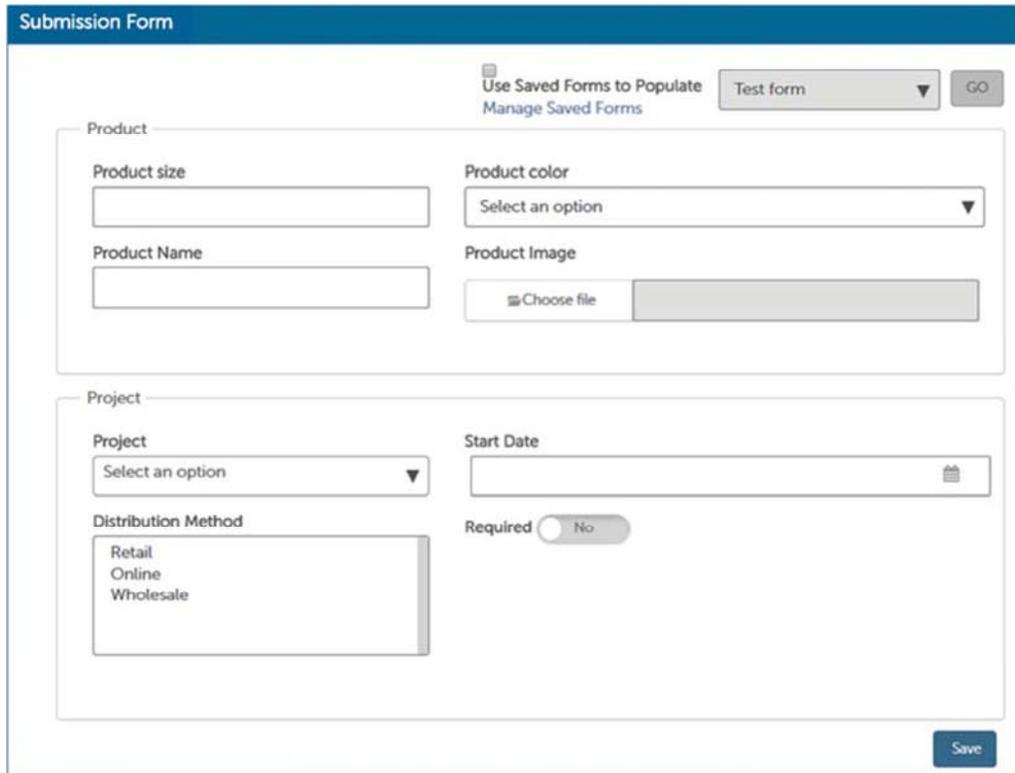


Figure 13.10 - Sample Details Information - Create Design Request Screen

7.1. The displayed questions will be controlled by the selected submission type and the answer depending upon the data type:

7.1.1. **Numeric:** field that only accepts numbers.

7.1.2. **Text:** this field type accepts text (alphanumeric data) and has a previously defined maximum length.

7.1.3. **Date:** for this field type, the system shows a calendar and you select the desired date.

7.1.4. **File:** to attach a file to the design, click the **Choose file** button and select the file name to attach.



- 7.1.5. **Single choice:** field that offers many possible answers, but you can only select one of them.
- 7.1.6. **Single choice but you can add option:** field that offers many possible answers and you can only select one of them, but the system offers you the possibility that add a new option. To do that:
- Enter the new option in the field shows before the options list.

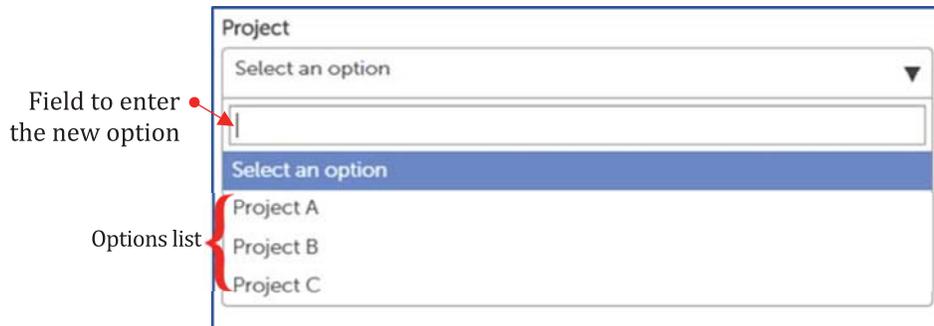


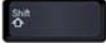
Figure 13.11 - Adding option to the single choice field type

- Click on the **New Value** label that appears next to the previously entered value.



Figure 13.12 - Adding option to the single choice field type

- 7.1.7. **Multiple choice:** field that offers many possible answers and you can select one or more of them. You can select multiple options in the list by one of these techniques:

- Hold down the ctrl key  and select the values one by one. (Non-contiguous values range).
- Select the first value, hold the shift key  and select the last value. (Contiguous range).
- Hold the left mouse button on the first value and drag the mouse until the last value. (Contiguous range).



Attention: All the design detail questions are required fields, unless the question is marked as optional.

- 7.2. You can auto-populate the detail questions from a saved template and complete the questions quickly. To do that:
- 7.2.1. Click the checkbox next to the **Use Saved Forms to Populate** label.
 - 7.2.2. Click the drop-down field next the **Use Saved Forms to Populate** label and select the saved form name from the list.
 - 7.2.3. Click the **GO** button. The system will auto-populate the detail questions with the saved answers. These answers can be changed.
- 7.3. You can create a new *Saved Form* with new entered answers. To do that:
- 7.3.1. Complete the detail questions with the value to save.
 - 7.3.2. Click the **Save** button located within the **Details** information group.
 - 7.3.3. The system will display a dialog box requiring the form name. Enter the form name.

Figure 13.13 - Saving new form with answers of design detail

- 7.3.4. Click the **Proceed** button to save the new form template or click the **Cancel** button to exit without saving.
- 7.4. You can remove *Saved Form* from the list. To do that:
- 7.4.1. Click the **Manage Saved Forms** hyperlink. The system will show a dialog box showing all saved forms.

Name	Description	Actions
Test Form 01	DesignDetailTemplate: Standard Template	
Test Form 02	DesignDetailTemplate: Standard Template	
Test Form 03	DesignDetailTemplate: Standard Template	

Figure 13.14 - Saved Form List



- 7.4.2. To remove a saved form, click on the wastebasket image  located in the row of the saved form that you want to delete.
 - 7.4.3. Click the **Close** button to exit and return to the *Design Submission* screen.
8. Finish the design creation. There are two ways to complete the design creation:
 - 8.1. Save the design but not submit it. When you simply save the design, you can go back to the design registry and make additional modifications prior to submit it for review/approval. To do that, click the **Save** button. The system performs the following actions:
 - Save the design record.
 - The design is marked with the *Pending Submission* status.
 - 8.2. Submit the design. When you submit the design, you are saving the design registry and submitting the design for review/approval. There are two options to submit a design:
 - To submit the design and stay on the *Design Submission* screen, click the **Submit & New** button.
 - To submit the design and exit the *Design Submission* screen, click the **Submit** button.

When the design is submitted, the system performs the following actions:

- Save the design record.
- The design is marked with the *Pending Approval* status.
- An email notification is sent indicating the design submission to the following users:
 - The primary user defined in the design contact information.
 - All users included in the **CC** field in the design contact information.
- An email notification is sent to the approver user indicating that they have a design submission for review/approval.