CREATIVE STUDIO CLIENT PORTAL

Creative Studio uses next-generation project management software called Function Point. This software is designed for an integrated system that embraces multi-media marketing collateral and digital strategies.

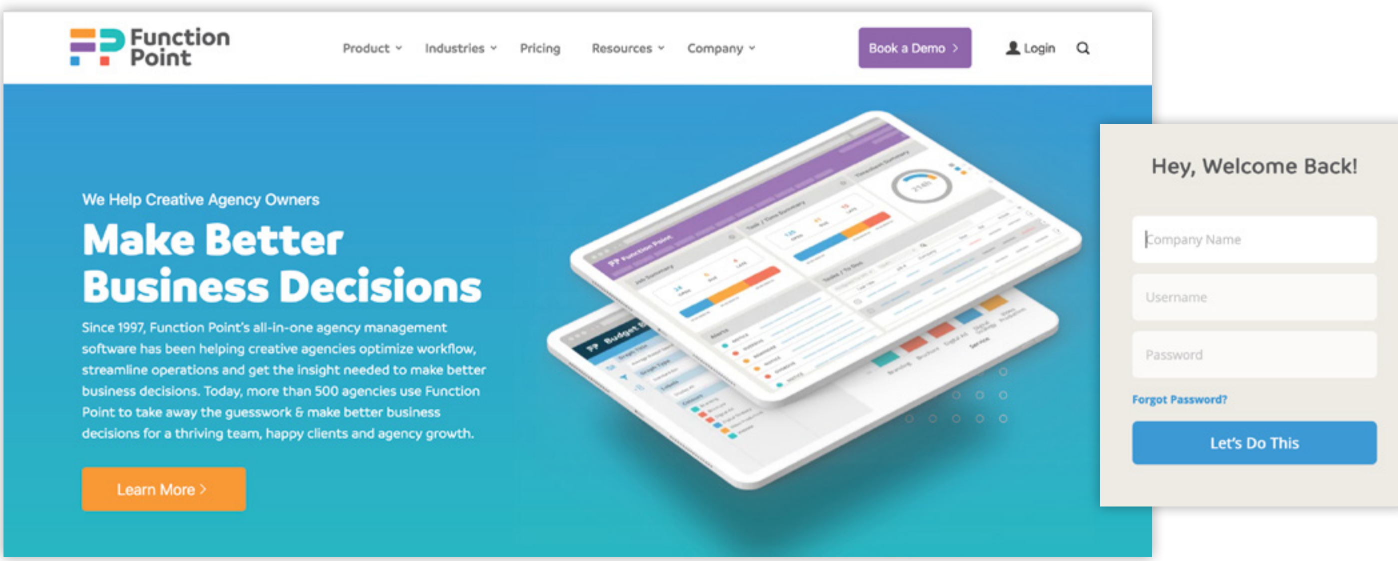
If you don't have a Function Point account, email creative@uwaterloo.ca to request login credentials

FUNCTION POINT

- User-friendly client requests and streamlined communication via a client portal.
- Centralized workflow in a real-time, paperless environment, perfect for remote teams.
- Improved project scheduling and automated notifications.
- Detailed project reporting and real-time status monitoring.

LOGIN

1. Visit functionpoint.com and click the **Login** button located in the top right corner of the webpage.
2. Enter the following credentials and click the **Let's Do This** button to login.
   › Company Name: **University of Waterloo** › Username and Password: (**as provided by Creative Studio**)



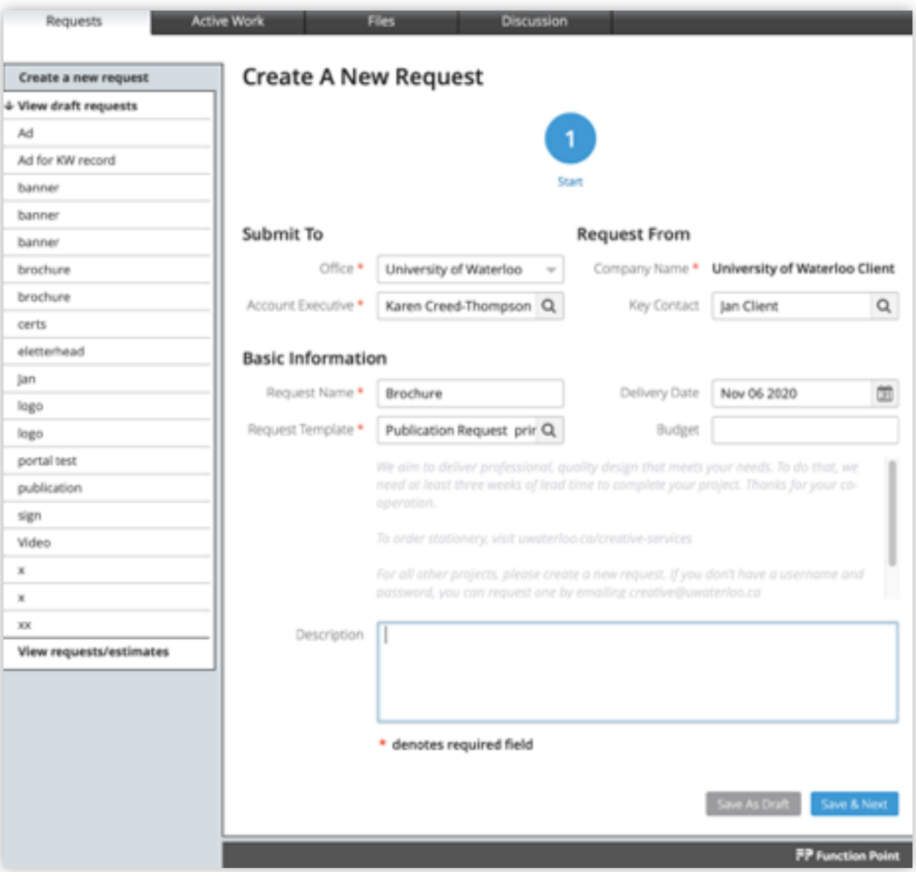
UNIVERSITY OF WATERLOO | Creative Studio

CREATE A NEW REQUEST

To submit a new project to Creative Studio, click on the Requests tab. Each request has three sections that you will need to complete.

SECTION 1: BASIC INFORMATION

- **Request name:** Enter the name of your project (e.g., Advancement Brochure)
- **Brief template:** Select the type of project (e.g., Advertising, Publication, etc.)
- **Delivery date:** Select the date when you need the project completed by
- **Budget** (optional)**:** Enter the budget for your project
- **Description** (optional)**:** Provide a high-level overview of what your project is about



NOTE

Creative Studio requires at least three weeks of lead time for new project requests.

Click the **Save & Next** button to navigate to Section 2.

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SECTION 2: REQUEST DETAILS

In Section 2, enter as much information as you can so Creative Studio can understand the full scope of your project. When you've completed Section 2, click the **Save & Next** button to navigate to Section 3.

SECTION 3: MORE DETAILS

In Section 3, provide all required information including the Unit4 code to help us properly process the request. When Section 3 is complete, click the **Save & Next** button.

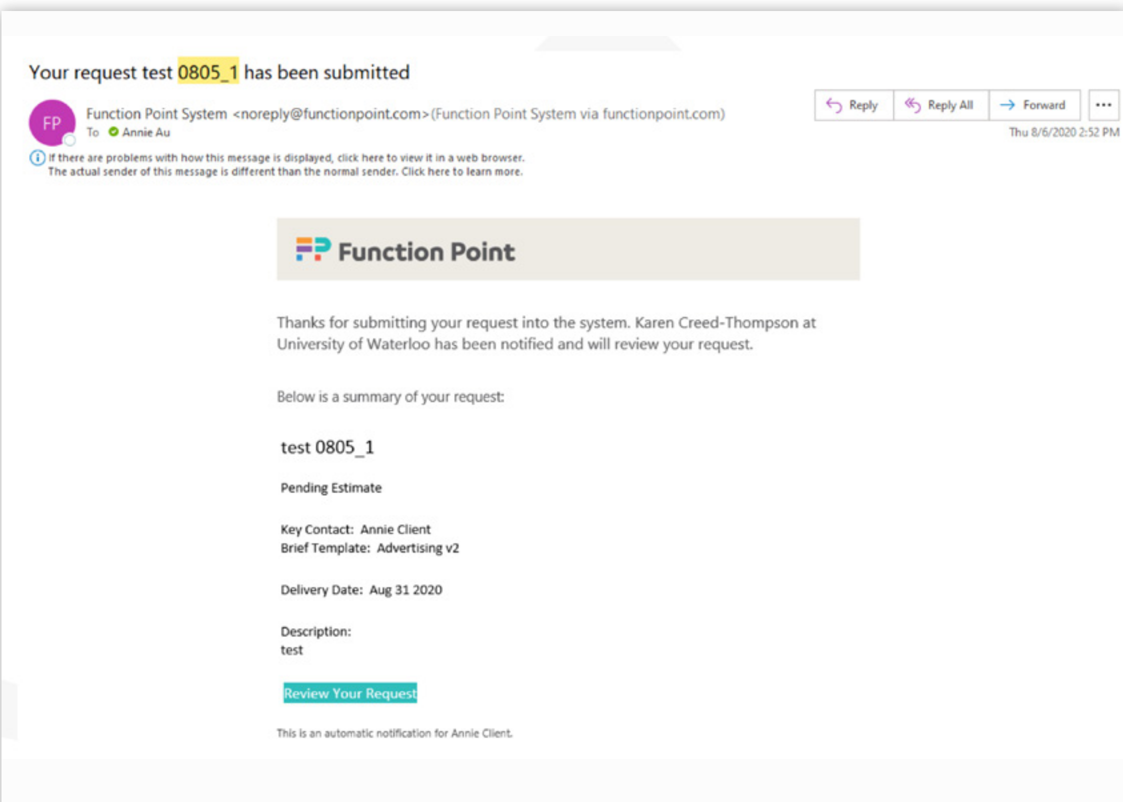
TIP

Enter as much information as you can to ensure Creative Studio understands the full scope of work.

REVIEW AND SUBMIT REQUEST

Be sure to review all information provided with your request. If you need to make a change, click the **Save & Previous** button to go back and edit details. When you are certain all information is complete and accurate, click the **Review & Submit** button.

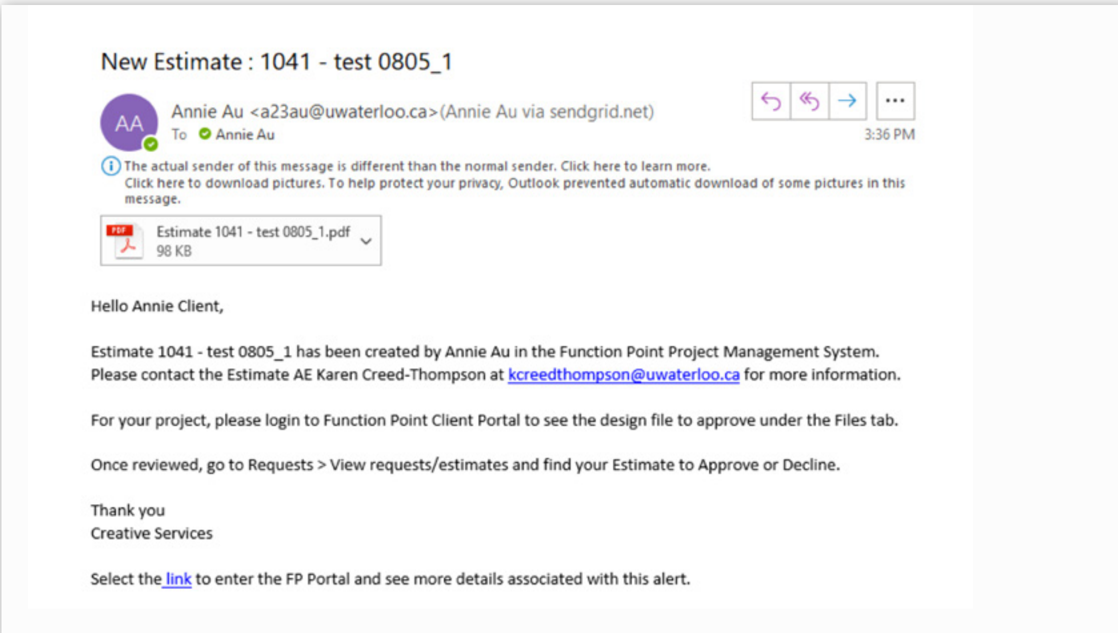
You will receive an email acknowledgment that your request has been submitted. The request and its status can be viewed under the **View Requests/Estimates** tab along with any other work you've requested.



PROJECT ESTIMATES

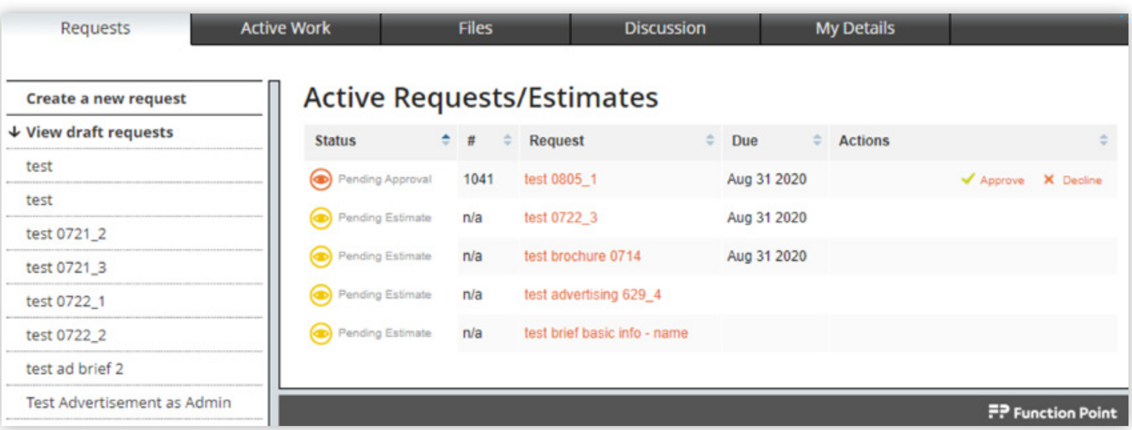
EMAIL NOTIFICATION

Once Creative Studio has reviewed your request, you will receive an email notification to let you know that Creative Studio has created an estimate. The estimate will be included as an attachment with your email notification and can also be viewed by logging into the Function Point Client Portal.



REVIEWING ACTIVE ESTIMATES

When you are logged into the Function Point Client Portal, you can review an estimate by selecting the **Requests tab** and clicking **View Requests/Estimates** in the sidebar menu located on the left. Each estimate pending approval will have an **Approve** link and a **Decline** link located next to it under the **Actions heading**.



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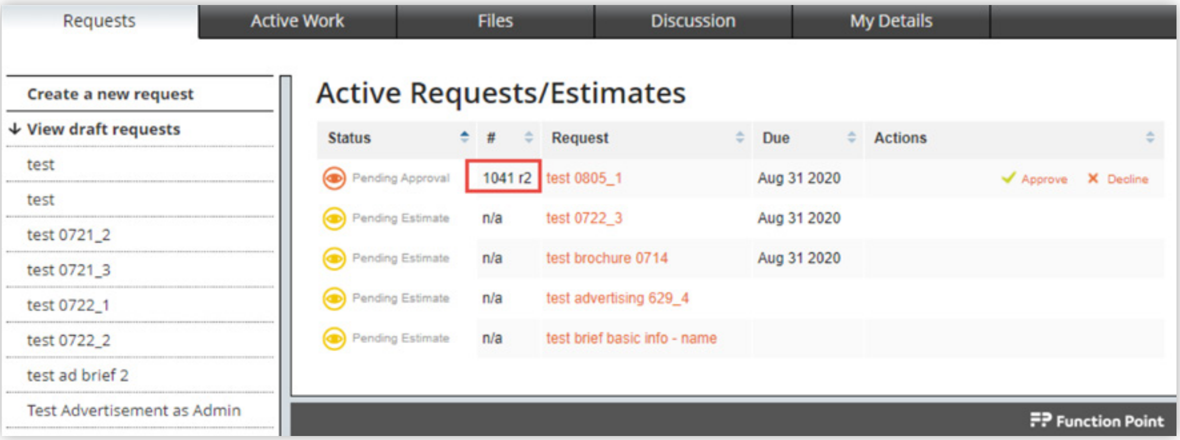
Decline an Estimate

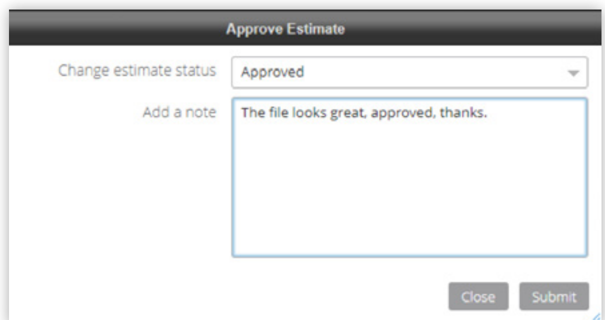
When you click the **Decline** link located under the **Actions** heading, the corresponding estimate will be removed from the Active Requests/Estimates list until it is revised. It will still exist in the Function Point system and can be reworked as a revision and can reappear in the list to Approve once Creative Studio revises.

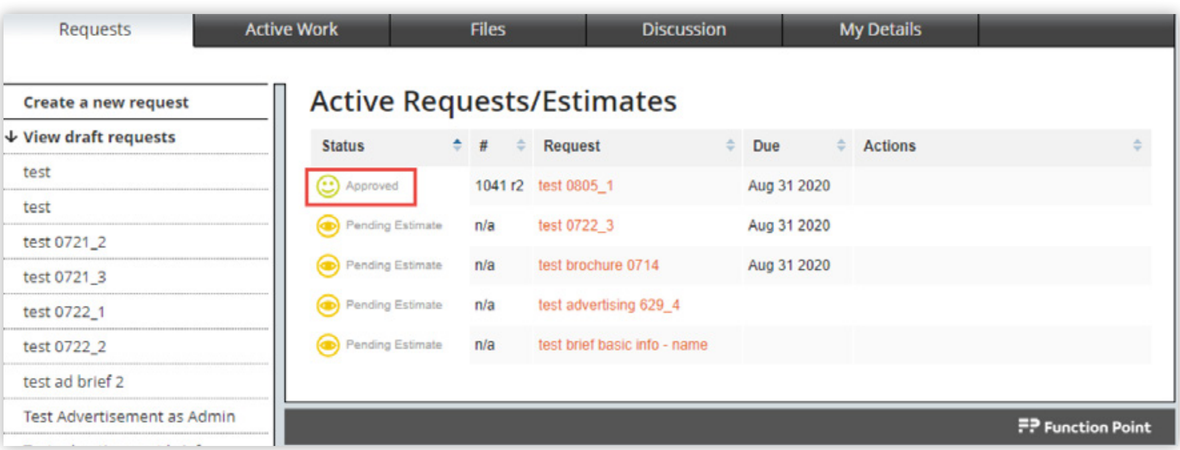


Approve an Estimate

When you click the **Approve** link located under the **Actions** heading, a pop-up box will appear with a drop-down menu to change the estimate status and a text field where you can add a note. Complete the approval by clicking the **Submit button**.

Once an approval is submitted, the corresponding estimate will change immediately and the project will be moved to the **Active Work** tab.

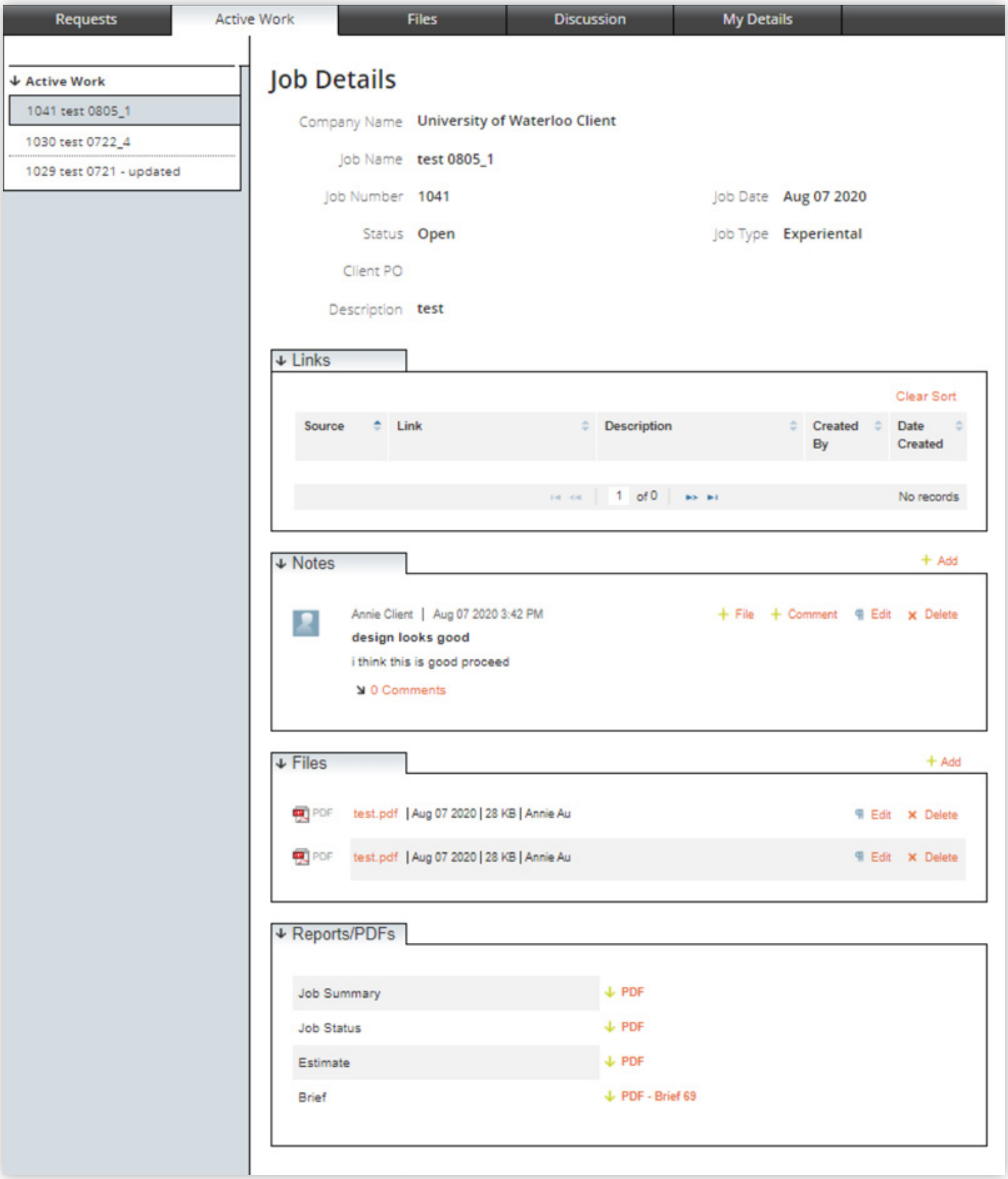




After Creative Studio receives approval of an estimate, your request may be converted to a new job (for example, a brochure order) and you will receive an email notification.

DESIGN REVIEW

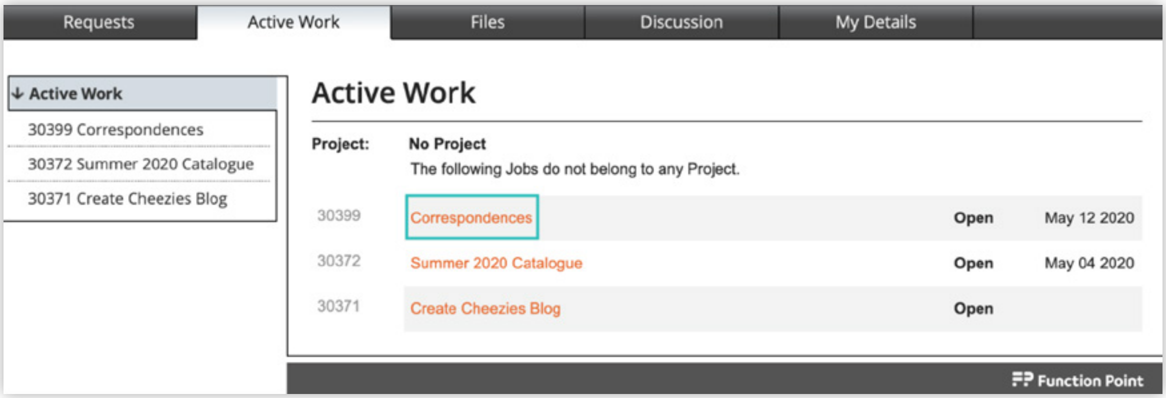
When a design is ready for review or approval, you will receive a notification to view the file. When you are logged into the Function Point Client Portal, go to the **Active Work tab**. Select the job number and scroll to the **Files** where you can choose a file to view.



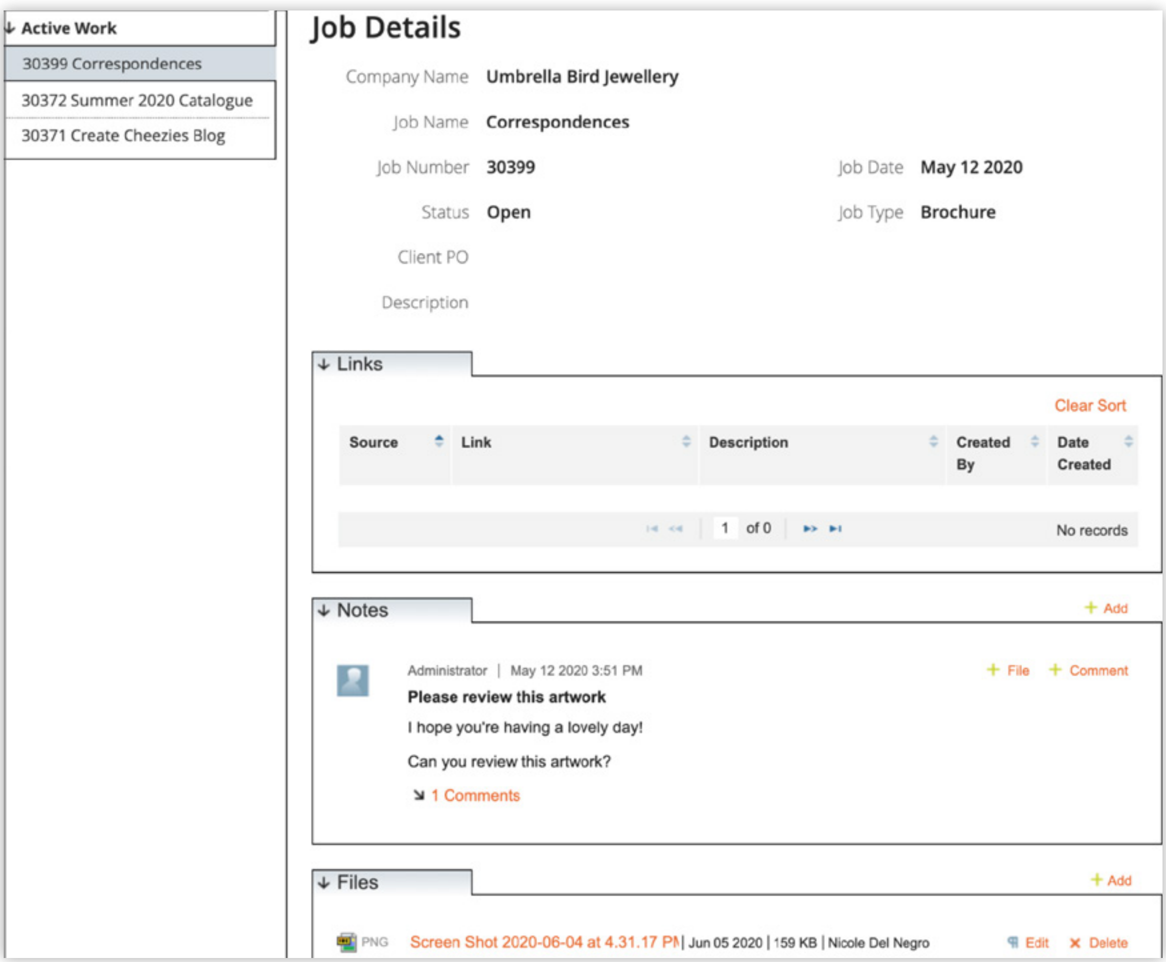
When reviewing a file, you can add comments to the job in the **Notes** section.

VIEWING ACTIVE WORK

When you log into the Client Portal, you will see the **Active Work tab** by default. This tab shows any projects currently in progress.



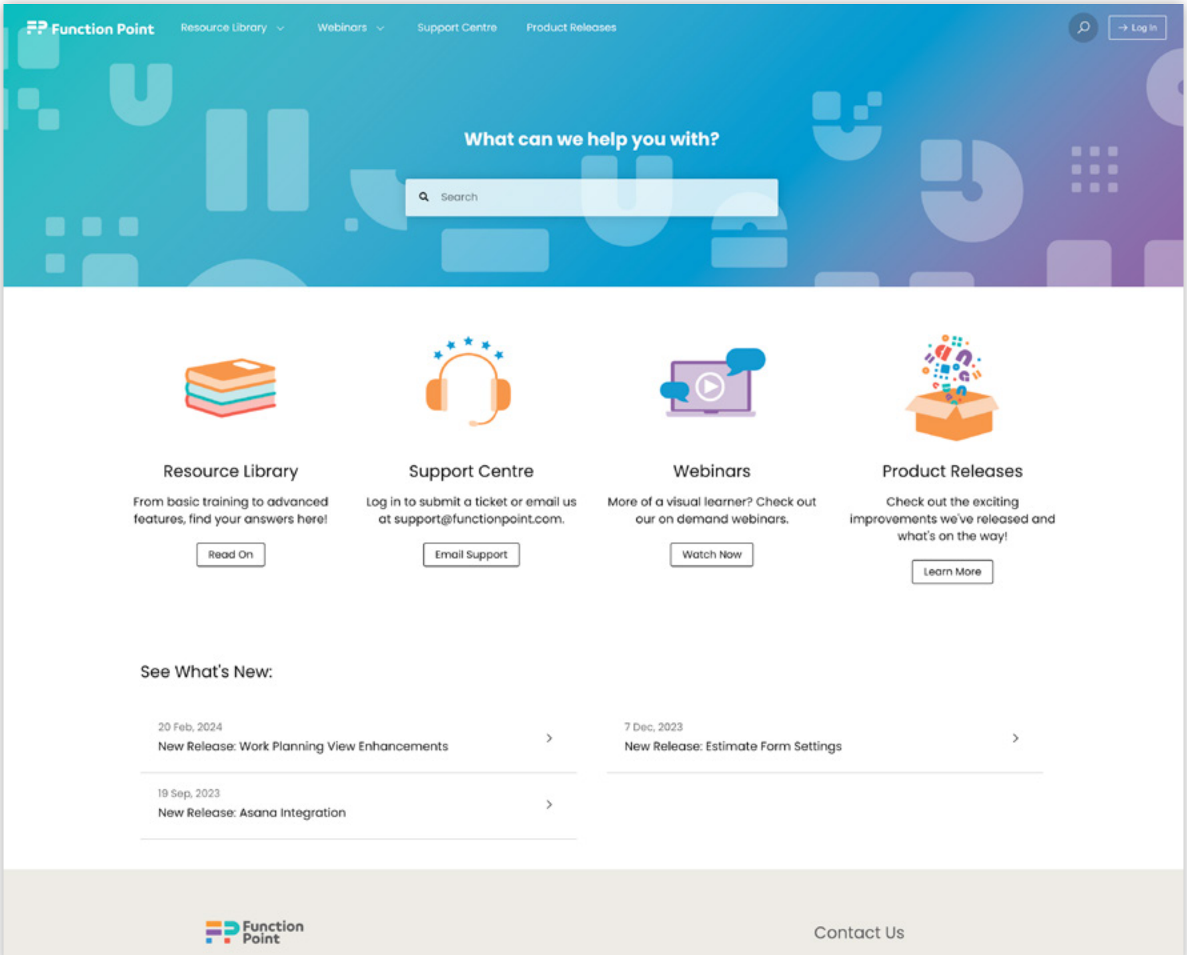
Select a job in the left-hand menu to see any available information about that project, including links, notes, files and reports.



Add notes and files to a job by clicking the corresponding **+ Add button.** There is no limit to the number of files and notes you can add. Individual files must be under 50 MB.

Function Point Resources and Support:

support.functionpoint.com



For more information contact: creative@uwaterloo.ca

uwaterloo.ca/creative-studio