

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.

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.



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

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)

The image shows a screenshot of the Function Point website. The website has a blue header with the Function Point logo on the left and navigation links (Product, Industries, Pricing, Resources, Company) in the center. On the right of the header, there is a 'Book a Demo' button and a 'Login' link. The main content area features a large blue banner with the text 'We Help Creative Agency Owners' and 'Make Better Business Decisions'. Below this, there is a paragraph of text and a 'Learn More' button. To the right of the banner, there is a 3D rendering of a tablet displaying the software interface. Overlaid on the right side of the screenshot is a login form with the following fields: 'Company Name', 'Username', and 'Password'. Below these fields is a 'Forgot Password?' link and a blue 'Let's Do This' button.



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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

Requests | Active Work | Files | Discussion

Create A New Request

1 Start

Submit To

Office * University of Waterloo

Account Executive * Karen Creed-Thompson

Request From

Company Name * University of Waterloo Client

Key Contact Jan Client

Basic Information

Request Name * Brochure

Delivery Date Nov 06 2020

Request Template * Publication Request prir

Budget

We aim to deliver professional, quality design that meets your needs. To do that, we need at least three weeks of lead time to complete your project. Thanks for your co-operation.

To order stationery, visit uwaterloo.ca/creative-services

For all other projects, please create a new request. If you don't have a username and password, you can request one by emailing creative@uwaterloo.ca

Description

* denotes required field

Save As Draft Save & Next

FP Function Point

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.

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.

TIP



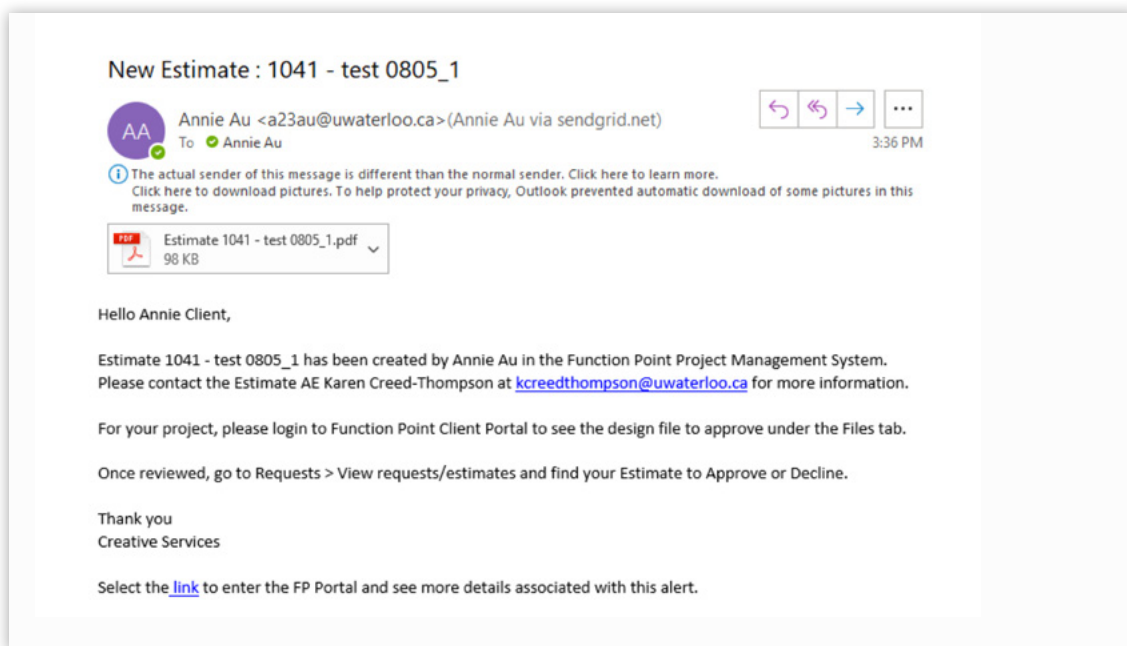
Enter as much information as you can to ensure Creative Studio understands the full scope of work.

The screenshot shows an email notification from the Function Point System. The subject line is "Your request test 0805_1 has been submitted". The sender is "Function Point System <noreply@functionpoint.com> (Function Point System via functionpoint.com)" and the recipient is "Annie Au". The email body contains the Function Point logo and a message: "Thanks for submitting your request into the system. Karen Creed-Thompson at University of Waterloo has been notified and will review your request." Below this, it says "Below is a summary of your request:" followed by "test 0805_1", "Pending Estimate", "Key Contact: Annie Client", "Brief Template: Advertising v2", and "Delivery Date: Aug 31 2020". There is a "Description:" field with the value "test". At the bottom, there is a blue button labeled "Review Your Request" and a footer note: "This is an automatic notification for Annie Client." The email interface includes standard actions like "Reply", "Reply All", "Forward", and a date/time stamp "Thu 8/6/2020 2:52 PM".

PROJECT ESTIMATES

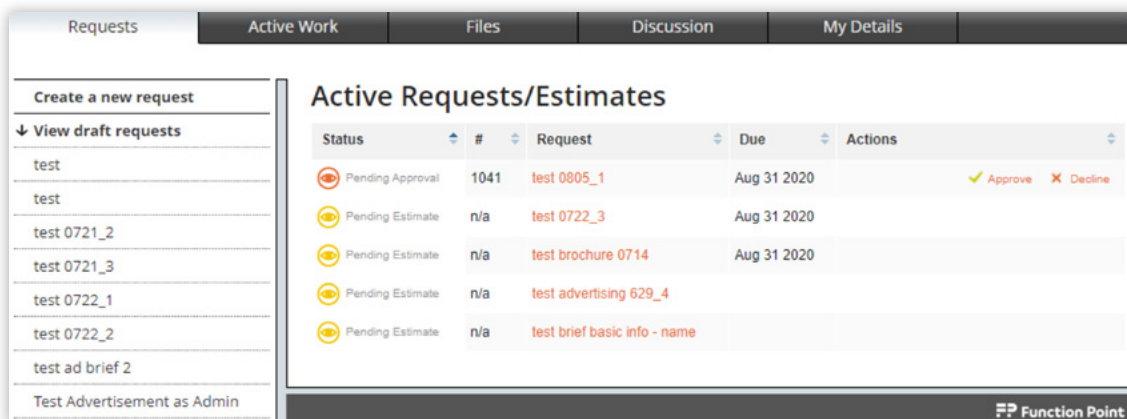
EMAIL NOTIFICATION

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

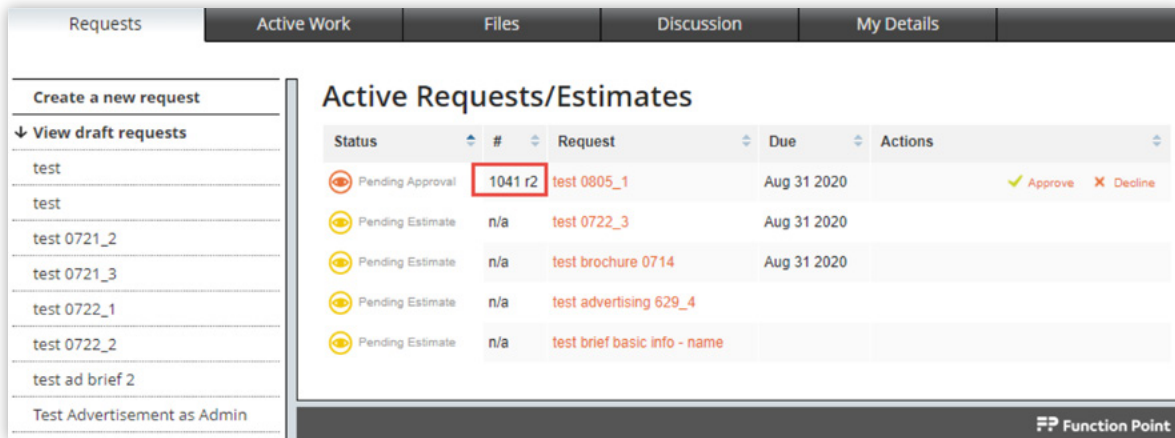
When you are logged into the Function Point Client Portal, you can review an estimate by selecting the **Requests** tab and clicking **View Requests/Estimates** in the sidebar menu located on the left. Each estimate pending approval will have an **Approve** link and a **Decline** link located next to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



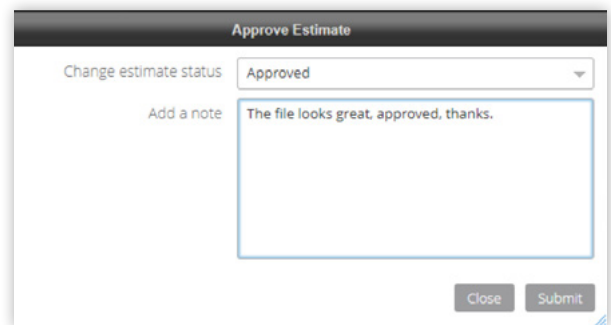
The screenshot shows the 'Active Requests/Estimates' table with the following data:

Status	#	Request	Due	Actions
Pending Approval	1041 r2	test 0805_1	Aug 31 2020	Approve Decline
Pending Estimate	n/a	test 0722_3	Aug 31 2020	
Pending Estimate	n/a	test brochure 0714	Aug 31 2020	
Pending Estimate	n/a	test advertising 629_4		
Pending Estimate	n/a	test brief basic info - name		

Approve an Estimate

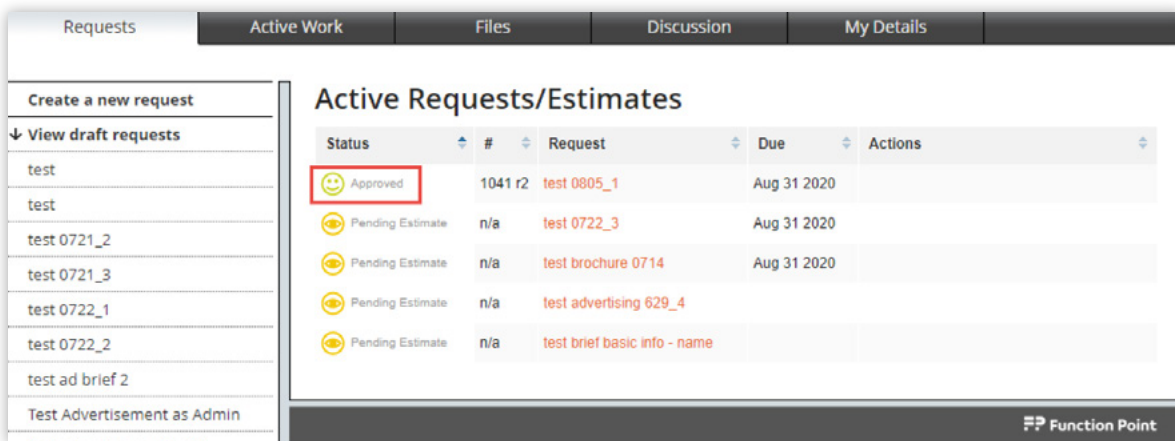
When you click the **Approve** link located under the **Actions** heading, a pop-up box will appear with a drop-down menu to change the estimate status and a text field where you can add a note. Complete the approval by clicking the **Submit** button.

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



The 'Approve Estimate' form contains the following fields and buttons:

- Change estimate status: Approved
- Add a note: The file looks great, approved, thanks.
- Buttons: Close, Submit



The screenshot shows the 'Active Requests/Estimates' table with the following data:

Status	#	Request	Due	Actions
Approved	1041 r2	test 0805_1	Aug 31 2020	
Pending Estimate	n/a	test 0722_3	Aug 31 2020	
Pending Estimate	n/a	test brochure 0714	Aug 31 2020	
Pending Estimate	n/a	test advertising 629_4		
Pending Estimate	n/a	test brief basic info - name		

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.

The screenshot displays the 'Active Work' tab in the Function Point Client Portal. The main content area is titled 'Job Details' and shows information for job '1041 test 0805_1' at the 'University of Waterloo Client'. The job status is 'Open' and the job type is 'Experiential'. The job date is 'Aug 07 2020'. Below the job details are four sections: 'Links' (empty), 'Notes' (one note from Annie Client on Aug 07 2020 at 3:42 PM stating 'design looks good'), 'Files' (two PDF files named 'test.pdf'), and 'Reports/PDFs' (four items: Job Summary, Job Status, Estimate, and Brief, each with a PDF download icon).

Source	Link	Description	Created By	Date Created

1 of 0

No records

Annie Client | Aug 07 2020 3:42 PM
design looks good
i think this is good proceed
0 Comments

File Name	Date	Size	Author	Actions
test.pdf	Aug 07 2020	28 KB	Annie Au	Edit Delete
test.pdf	Aug 07 2020	28 KB	Annie Au	Edit Delete

Report/PDF Name	Action
Job Summary	PDF
Job Status	PDF
Estimate	PDF
Brief	PDF - Brief 69

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.

The screenshot shows the 'Active Work' tab in the Client Portal. The top navigation bar includes 'Requests', 'Active Work', 'Files', 'Discussion', and 'My Details'. The 'Active Work' section is active. On the left, there is a sidebar menu with three items: '30399 Correspondences', '30372 Summer 2020 Catalogue', and '30371 Create Cheezies Blog'. The main content area is titled 'Active Work' and shows a 'Project: No Project' status with the message 'The following Jobs do not belong to any Project.' Below this, there is a table of jobs:

Job ID	Job Name	Status	Created Date
30399	Correspondences	Open	May 12 2020
30372	Summer 2020 Catalogue	Open	May 04 2020
30371	Create Cheezies Blog	Open	

The 'Function Point' logo is visible in the bottom right corner.

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

The screenshot shows the 'Job Details' page for job 30399. The left sidebar menu is the same as in the previous screenshot, with '30399 Correspondences' selected. The main content area is titled 'Job Details' and shows the following information:

- Company Name: Umbrella Bird Jewellery
- Job Name: Correspondences
- Job Number: 30399
- Job Date: May 12 2020
- Status: Open
- Job Type: Brochure
- Client PO: (empty)
- Description: (empty)

Below the job details, there are three sections:

- Links:** A table with columns for Source, Link, Description, Created By, and Date Created. The table is currently empty, showing '1 of 0' records and 'No records'.
- Notes:** A section with a '+ Add' button. It contains one note from the Administrator dated May 12 2020 3:51 PM. The note text is: 'Please review this artwork. I hope you're having a lovely day! Can you review this artwork?'. There are '+ File' and '+ Comment' buttons next to the note, and a '1 Comments' indicator below it.
- Files:** A section with a '+ Add' button. It contains one file: 'Screen Shot 2020-06-04 at 4.31.17 PM' (PNG), uploaded on Jun 05 2020, 159 KB, by Nicole Del Negro. There are 'Edit' and 'Delete' buttons next to the file.

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.



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For more information contact: creative@uwaterloo.ca

uwaterloo.ca/creative-studio