

# Studio+ Payroll Files Guide

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# Working with Payroll Files

Welcome to Cast & Crew's Studio+, a system designed for sending, receiving, and sharing sensitive information securely. The purpose of this guide is to demonstrate how Payroll Coordinators and Payroll Accountants can manage payroll-related files in Cast & Crew's Studio+.

Cast & Crew's Studio+ now offers integration with MyCast&Crew, Start+ and Hours+. That means access to payroll edits, access to invoices, and file sharing capabilities directly with a Cast & Crew Payroll Coordinator.





# **Cast & Crew Folders**

#### The FROM Cast & Crew Folder:

Cast & Crew automatically uploads payroll reports to this folder for you to retrieve. These files are marked as "Added from Payroll."

Though your Cast & Crew Payroll Coordinator can view these files, they cannot delete them.

#### The TO Cast & Crew Folder

Use the **TO Cast & Crew** folder to upload start documents, timecards, and any other files to be shared with the Payroll Coordinator. The Payroll Coordinator can view, print, and move these files, but they cannot delete anything from this folder.

The **TO Cast & Crew** folder also has the Adjustment Corrections folder, which is used to upload any corrections needed to be made for *adjustment* invoices.

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### TO Cast & Crew Folder:

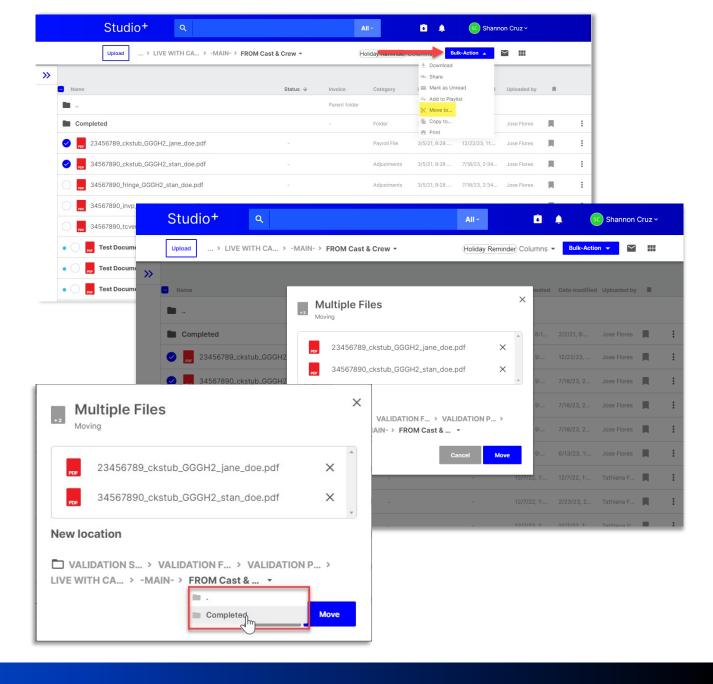
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# **The Completed Folder**

Once documents have been processed and completed, it is important to move them into the **Completed** folder to stay organized and easily view only new documents that have been added by your Payroll Coordinator. Documents can be moved to the Completed folder in bulk, or individually:

- 1. Double-click the FROM Cast & Crew folder.
- 2. Select the circle to the left of the document(s) that you want to move.
- 3. If moving multiple files at once, click the **Bulk-Action** button in the top right.
- 4. In the drop down, select Move To.
- 5. Select the **Completed** folder in the folder path.
- 6. Click Move.
- 7. You can view your files by double-clicking the **Completed** folder.





# Search

The Search functionality located at the very top of the screen makes it easy to locate documents quickly. Using Optical Character Recognition (OCR) technology, Studio+ recognizes handwritten or typed text in various file types and makes it all searchable in file content too!

You can search for:

- Projects Only
- File/Folder Names Only: Excludes content of files
- File Contents Only: Excludes file/folder names
- File Types: List of various file types
- Categories: Tags that have been assigned to files after upload
- Date Ranges: Set filters to search a preset time (past day, week, month, or year), or set a custom range

Note: You may use multiple filter types at once.

For more extensive search results, press **Enter** after typing your search query. The system will populate the Search Results page with a more comprehensive list of all the results related to the keywords.

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## **Receiving Notifications**

It is recommended that you enable notifications for all **FROM Cast & Crew** folders in order to be notified and receive an email whenever new payroll files are uploaded to this folder.

#### To enable notifications:

- 1. Right-click the FROM Cast & Crew folder and select "Enable Notifications" or
- 2. Click your name in the top-right corner, then select **User Settings**, and customize notification settings.
- 3. You can customize your individual notifications by document type and be notified when the selected document type is uploaded regardless of its destination folder.

**Note:** If you have turned on folder-level notifications that conflict with a category-enabled notification, the folder-level notification will control the notifications you receive and you will receive notifications regardless of category assigned to files that are uploaded under that folder. If you'd like to receive notifications by category only, you can always disable the folder-level notification.

For instructions on how to Disable Notifications, click here.

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# **Sharing Files**

We've made it easier to manage the payroll workflow by providing a safe, secure environment for exchanging files with the Payroll Coordinator. Upload timecards, start documents, and other files to a specified folder. Your Payroll Coordinator can then access these files to process them:

- 1. Select the file(s) you'd like to share.
- 2. Click either the 3-dot menu near the file or select the circle to the left of each relevant file and click **Bulk-Action** if you're sharing multiple files.
- 3. Select Share.
- Enter the user(s) you would like to share the document with. Click Next. Note: Files can only be shared between users that have been added to the organization. To add a user, contact your Admin.
- 5. Select the share options, an expiration date, and max views a person can have. You may choose to share without a password. If you do so, the user will only need to click a link to access the file. If this is not selected, the user will be prompted to enter their email and password before gaining access. The password will be sent to the user via the share email.
- 6. You can also enter a custom message to be inserted into the share email.
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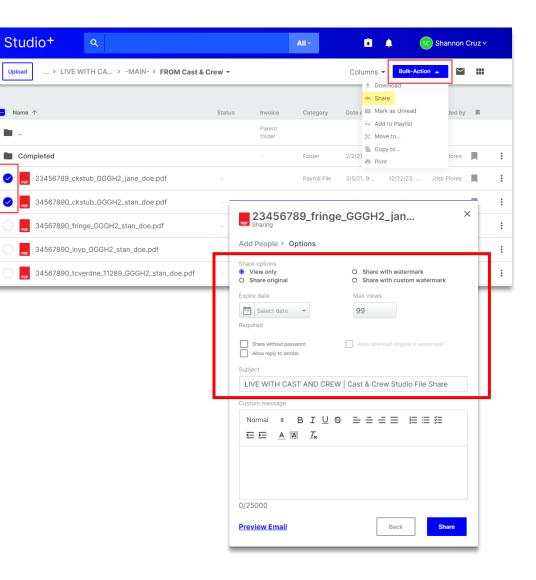
7. Click **Share** to finish.



### **Approving Files Without Digital Edits**

Approvals can take place through Studio+ without emailing, downloading or printing. Multiple approvals can also take place by using Bulk-Action. An accountant can select the invoice(s) they are approving and share it with the coordinator, mentioning the approval in the message.

- 1. Select the file(s) you'd like to approve.
- 2. Click the 3-dot menu to share individual files, or select the circle to the left of each relevant file and click Bulk-Action if you're sharing multiple files.
- 3. Select Share.
- 4. Choose the coordinator who should receive the approval.
- 5. Click Next.
- 6. Choose View Only.
- 7. Set an expiration date for the approval. We recommend 7-10 days.
- 8. Select Max Views. If you don't have a max view preference, type "99" in the field.
- 9. Use an appropriate subject line, like "Approved," and a relevant message pertaining to the approval.



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#### 10. Click Share.



# **Approving Files With Digital Edits**

If you're using Digital Edits, you can access your digital edit report in two ways:

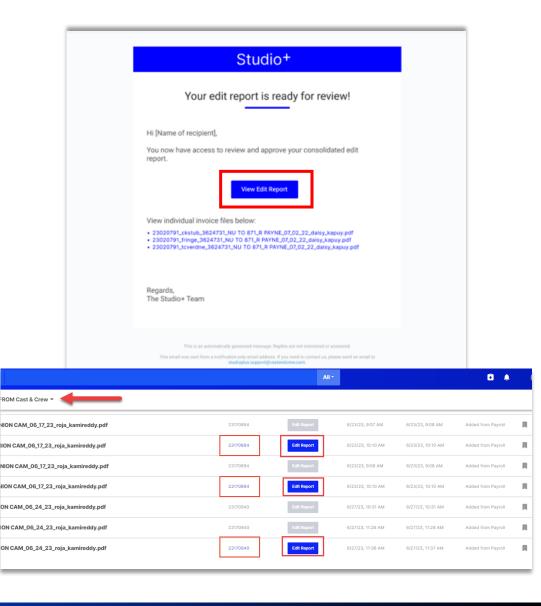
#### **Email notifications:**

You'll receive an email notification from Studio+ alerting you that a new edit report or approved invoice has been uploaded. Click the 'View Edit Report' button to view the full edit report or click the invoice links to review individual invoice files in Studio+.

#### Within Studio+'s "FROM Cast & Crew" folder:

Access the FROM Cast & Crew folder in Studio+ to see your available edit reports. The latest versions will display a blue 'Edit Report' button (or an 'Approved Invoice' button if the invoice has already been approved) and a hyperlinked invoice number. Click the button or the invoice number to access the Edits screen. Note that prior versions of the edit report will not have active links.

Once you've accessed your digital edit report, you'll be able to request revisions or approve the invoice digitally. Keep in mind that only those with the Invoice Approver role can approve or request revisions on the Edits screen. <u>Click here</u> to view a detailed, step-by-step guide and video on how to approve invoices using digital edits.



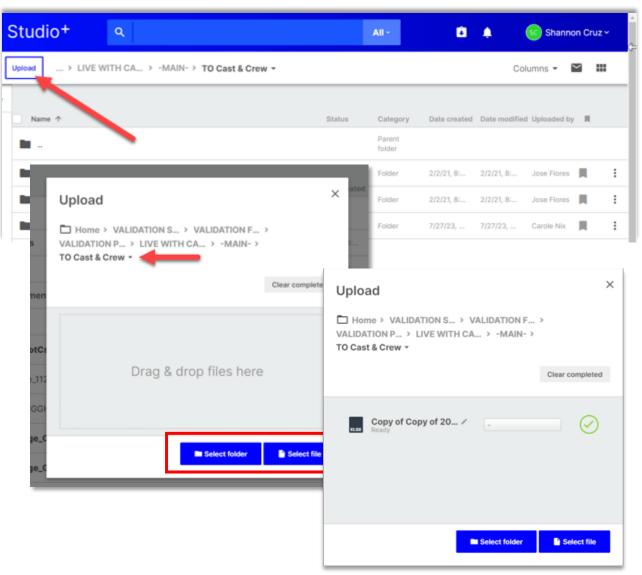


## **Upload Documents**

Documents can only be uploaded to the **TO Cast & Crew** folder for the Payroll Coordinator to receive a new file from the payroll accountant.

- Click the Upload button located on the upper-left corner of the screen. The Upload modal will appear.
- 2. Uploads can be done by dragging and dropping or using the Select button at the bottom of the modal. You can upload entire folders or individual files.
- 3. A red  $\mathbf{X}$  indicates that the file is still uploading.
- 4. A green check  $\checkmark$  indicates that the file has successfully uploaded.

You can exit the Upload modal while files are still uploading and move on to other tasks within Studio+. The files will continue to successfully upload in the background. Once you start the upload process, it's not cancellable. The **Clear Completed** button does not cancel your upload or delete the files, but simply clears the uploaded files from appearing in the Upload modal.





## **Download Documents**

You can easily download files in Studio+ to access them conveniently on a personal computer. Files can be downloaded in bulk with the **Bulk**-**Action** button or individually.

- 1. Double-click into the FROM Cast & Crew folder.
- Select the file(s) you want to download by clicking the circle(s) next to the file names.
- 3. If downloading multiple files, click **Bulk-Action** and select **Download**. If downloading an individual file, right-click or click the 3 dots at the far right of the file name.
- 4. Click Download File.
- 5. The file will then be downloaded to the computer.

Please Note: You can always return to the Download Manager page by clicking the download icon next to the bell at the top of the screen. If downloading multiple files at once, the files will download as **one** .zip file and you will need to extract the files to review them on a computer.

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# **Print Documents**

Files can be printed from either the **FROM or TO Cast & Crew** folders in three ways:

#### To print an individual file from the file list screen:

- 1. Find the file you would like to print.
- 2. Right-click or click the 3-dot menu to the right of the file row. Select Print.

#### To print an individual file from the preview file screen:

- 1. Double-click into the file you'd like to print to view it.
- 2. Right-click or click the 3-dot menu and select Print.
- 3. Choose to print with or without a watermark (option based on permissions).
- 4. Select your printer and click Print.

#### To print multiple files at once:

- 1. Select the files you want to print by clicking the circles to the left of each file name.
- 2. The Bulk-Action button will appear in the top right of the page.
- 3. Choose to print with or without a watermark (option based on permissions).
- 4. In the print preview window, you can scroll to see each individual file.
- 5. Select your printer and click Print.

### Individual file from the File List screen:

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### Individual file from the Preview File screen:



### Multiple files:

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### Studio Payroll

# Support

For assistance, troubleshooting or changing user access, please contact:

studioplus.support@castandcrew.com

Phone: 888.570.6180 Option #2

Questions about initial setup or configuration, please contact our Customer Success Team: <u>csmteam@castandcrew.com</u>

For additional Studio+ articles & guides:

Cast & Crew Help Center - https://support.castandcrew.com/kb/studio

Complimentary live client trainings can be booked on our EDGE Learning site:

https://edge.castandcrew.com/learning

Complimentary on-demand trainings can also be found on our EDGE Learning site:

https://edgelearning.castandcrew.com/



# Thank You