

Dear P&E Wing Member-

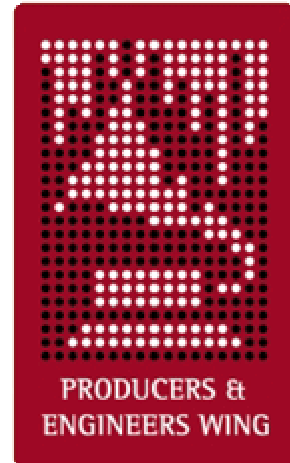
After more than a year in progress, I am proud to present the Florida Chapter P&E Wing Subcommittee's effort **Guidelines for Pro Tools Session Interchange** for your review.

The following below is an introduction that details how this initiative came about from P&E Subcommittee Co-Chairs Eric Schilling and Tom Morris. Please review and submit any comments directly to the committee at ptguidelines@norfolkmusic.net.

Thank you for taking the time to review this important P&E effort. Please look forward to other National P&E Wing initiatives that will be distributed to you in the near future.

Best Regards,

Leslie Lewis
Director
Producers & Engineers Wing



Introduction

This document is born out of the collective experiences and techniques of our committee. It is designed and formatted to provide clear and concise guidelines for various phases of production. We have included an appendix with the reasoning behind these guidelines for those who would like more detail. Our intent in this is to allow the reader to have a condensed easy read.

Any feedback you have is greatly appreciated. Please send all responses to ptguidelines@norfolkmusic.net

Florida P&E Subcommittee Co-Chairs
Eric Schilling & Tom Morris

PT Session Interchange

Version 2.09h

By The Florida Producers & Engineers Wing Technical Subcommittee

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GUIDELINES FOR PRO TOOLS SESSION INTERCHANGE

SUMMARY

If engineers adopt a consistent set of practices for Pro Tools sessions that achieves commonality in labeling, file management and audio track maintenance, the digital workstation method of recording and mixing can realize substantial improvement in productivity. This paper presents suggested guidelines specifically to aide in improving the exchange of sessions between various recording facilities and/or engineers.

PURPOSE

These Guidelines offer a quick reference guide to the engineer to aide in the process of recording Pro Tools sessions in such a way as to facilitate the exchange of session files and audio data between facilities and engineers. The fundamental points are listed in these Guidelines, but this is not intended to serve as the final word in recording technique, or as a how to manual. There is however substantial how to information included in the appendices.

DEFINITIONS

There are several types of Pro Tools sessions to be considered, each of which may have some important distinctions in how to best handle labeling and file management. For this papers purposes consider the following definitions for session types:

Master Session:

The primary session through out the pre-production, recording, and overdubbing phase. All the work may be done in this session, but any tracks recorded, edited or processed in other sessions should be transferred back to this session. This is where all the tracks intended for the final mix eventually end up. There should only be one Master session.

Slave Session:

Usually reduced track versions of the Master session made up from sub-mixes of its tracks. These are satellite sessions used for overdubbing (e.g. strings, backgrounds) or editing tracks (e.g. vocal comping) often at other studios or on other systems. The completed work is then imported back into the Master session. There may be one or more Slave sessions.

Source:

Usually retired sessions that contain all the original source tracks (e.g. drum takes, vocal takes, orchestra) that have been comped or sub-mixed down to tracks in the Master. These tracks are no longer needed so they are taken out of the Master session and kept in Source sessions for future reference. There may be one or more Source sessions.

Mix Master and Mix Slave:

Sessions being prepared for mixing either on a console or inside of Pro Tools. The Mix Master is the main session and plays back from the Master Pro Tools system. The Mix Slaves are slaves to the Mix Master and play back from additional locked-up Pro Tools systems. For each mix there should only be one Mix Master and optionally one or more unique Mix Slaves.

GUIDELINES

Contained herein are the suggested Guidelines for each of the session types defined above. Before we detail each session type guideline we will list general guidelines which you will want to apply to every type of session.

General Session Guidelines:

These following sections should be applied to all session types:

Standard Operating Procedures:

- A) Confirm that computer's Date and Time are set correctly.
- B) Always label audio tracks before recording, and rename any audio files that were recorded before the track is labeled..
- C) Use comments section liberally.
- D) Always label internal busses in I/O Set-Up.

E) Label Inputs, Outputs and Inserts in I/O Set-Up.

F) Label Aux Inputs with name of outboard gear used and document settings in comments.

Clean Up:

A) Clean up tracks by going through them and deleting loud noises and other extraneous elements that you don't want in the mix.

B) Check that all edits and punches are clean, put in crossfades if necessary, and make sure there are no clicks and pops.

C) Consolidate tracks into solid audio starting from the beginning of the session when you are completely finished editing them.

D) Delete all tracks that are not needed for the next session.

E) Delete all playlists that are not needed for the next session.

F) Remove all unused audio files before closing the session.

Organization:

A) Put tracks in an order that makes sense to you (e.g. drums, perc, bass, gtrs, etc)

B) Keep the Aux Input returns of submixed tracks (e.g., BG Vocals) adjacent to the source tracks.

C) Place FX Returns (Aux Inputs) and Mix Bus (Master Fader) preferably to the right and bottom, or optionally at the left and top.

D) Leave any optional tracks showing, but de-activated muted and clearly labeled in the comments as to their status.

E) Deactivate, mute, hide and generally move to the bottom/far right any remaining tracks that are no longer being used, but are being left for reference.

F) Keep all tracks that are to be used in the next session showing and essentially to the top/far left.

G) Leave comments showing for the next engineer to see when opening the session.

Master Session Guidelines:

Creating a new Master Session:

- A) The session should be labeled Song_Title-Master .
Keeping the main session always labeled as the Master communicates to everyone that this is the session to work on..
- B) .WAV is the recommended audio file type for compatibility with all DAW systems.
- C) Enforcing Mac/PC Compatibility is recommended to improve session interchange between all Pro Tools systems.
- D) Save the session to a level on your audio hard drive where you and future operators can locate it.
- E) Create some form of tempo map in the conductor track.
- F) Create Memory Location markers of song's arrangement.
- G) Always record or create an audio click track. Keep at top of session if possible (shown or hidden).
- H) Include key and modulation information in Get Info...

Slave Session Guidelines:

Creating a new Outgoing Slave Session:

- A) The session should be labeled with the song title, a description of its purpose, and the word Slave (e.g. Song_Title-String Slave).
- B) Consider the receiving system so the Slave will open properly.
- C) Building a Slave session from a cleaned out Master streamlines the process of keeping many of these very important items:
 - 1) Include the tempo map.
 - 2) Include the Click plug-in track, or the audio click track. Keep at top of session if possible (shown or hidden)
 - 3) Include the Memory Location markers.
 - 4) Include key and modulation information in Get Info...
 - 5) The start time and frame rate must be the same as the Master's.

D) Include separate reference tracks of instruments the session is being sent out to have overdubbed if applicable.

Creating a Returning Slave Session:

A) The final results of all work done in the Slave sessions should be transferred back to the Master session.

B) Return all the tracks that were in the Slave session when you received it.

C) Make sure the session start time is the same as when you received the session, or note in the Session Info Document if not.

D) Clearly label in the comments section all the tracks to import back into the Master session, as well as listing them in the Session Info Document.

E) Make note of changes or edits done to the original tracks of the Slave in the Session Info Document so they can be imported or reproduced in the Master.

F) Include your name and contact information in the Session Info Document for the receiving studio if they have any questions.

Source Session Guidelines:

Creating a Source Session:

A) The session should be labeled with the song title, a description of its purpose, and the word Source (e.g. Song_Title-Ld Vox Source).

B) The session should be saved to the Source Sessions folder.

Mix Session Guidelines:

Creating a Mix Session:

A) The session should be labeled with the song title and the word Mix (e.g. Song_Title- Mix)

B) Print Final Rough Mix labeled with song title and the date on a pair of tracks at the top of the session.

C) If volume automation is used to fade-in or fade-out of regions, then replace it with created audio fade-ins and fade-outs.

D) Use Mute Regions instead of muting with automation to mute audio tracks.

E) Leave any automation the producer wants the mixer to use (e.g. BG vocal blends, panning) and label it clearly in the comments.

F) Contact the mixer regarding whether you should leave the remaining nonessential automation in the session or delete it.

G) Before sending the session out to mix, look it over a few more times to double-check that you have these very important items:

- 1) Every track is there that is supposed to be.
- 2) All parts are there that are supposed to be on each track.
- 3) All fxs have been completed.
- 4) All comps (composite tracks) are completed and clearly labeled.
- 5) The correct lead vocal is there and VERY clearly labeled.
- 6) All tuned tracks have been printed to another track and are clearly labeled as tuned (it is sometimes useful to leave untuned versions of tracks that were tuned).
- 7) If the lead vocal is tuned, always leave a clearly labeled untuned version of the vocal.

H) Plug Ins

- 1) All essential (i.e. special effect) plug-ins should be printed to another track.
- 2) Keep unprocessed versions of printed tracks in the session clearly labeled. Leave plug-ins and settings so the mixer may process differently. Deactivate, mute, hide and generally move them to the bottom/far right.
- 3) Leave in only nonessential plug-ins the producer would like the mixer to reference and remove the rest.

File Management and Storage (recommendations for organizing session folders for efficient session transfer):

A) When sending session out there should be only one session file showing in the main session folder.

B) Additional session files should be stored in folders to prevent confusion about which is the current session.

C) To keep your sessions organized we recommend using the following folder names:

- Old Sessions – for all non-current sessions.
- Source Sessions – for all retired source tracks.
- MIDI Files – tempo maps, MIDI sequence files, etc.
- Rough Mixes
- Final Mixes

D) All of the session's audio files should reside in the Audio Files folder in the same session folder as the session file itself. Or if the audio files are divided between drives there should be only one session folder containing an Audio Files and Fade Files folder per drive.

E) For transferring sessions between studios during the production process we recommend saving session data to CD-R's, Firewire drives, SCSI drives or DVD-R's for their universality. These formats do not require third party software or external hardware other than the receiving system's computer. Essentially insuring that any studio you send them to can access them.

F) Always keep a copy of original the entire contents of the session folder (Session File, Audio Files, Fade Files, etc.) in your possession when sending a session out.

G) After preparing a session to send out (especially when sending out for mix) we recommend that you use the Save Session Copy In... method.

H) For final delivery of sessions see the Master Recording Delivery Recommendations at www.grammy.com.

APPENDICES:

Appendices duplicate some of the above guidelines and include additional rationale as well as some how-to information.

APPENDIX I - General Guidelines

These following sections should be applied to all session types:

Standard Operating Procedures:

A) Confirm that computer's Date and Time are set correctly.

This insures all file's Date Created and Date Modified information will be correct. If two files have the same name the newest can be chosen

B) Always label audio tracks before recording, and rename any audio files that were recorded before the track is labeled.

This will prevent audio files from being named "Audio 01-01", which makes it difficult to differentiate and locate them later.

C) Use comments section liberally.

This is very important. Include any information you feel may assist future engineers in understanding your or the producer's intentions, similar to notes on a tracksheet

D) Always label internal busses in I/O Set-Up.

This is a tremendous time saver for the next engineer when tracking the routing of the audio

E) Label Inputs, Outputs and Inserts in I/O Set-Up.

This is very useful when recreating patching from a previous session.

F) Label Aux Inputs with name of outboard gear used and document settings in comments.

Very useful when recreating a setup from an earlier session. Patching gear into the same numbered inputs and outputs (e.g. In 8/Out 8) on the audio interface can also be helpful.

Clean Up:

A) Clean up tracks by going through them and deleting loud noises and other extraneous elements that you don't want in the mix.

This does not mean to clean the tracks to the point of sterility. Leave in elements that give the performances character and life, such as breaths on the vocal tracks. Just delete those elements you are certain you don't want to be in the mix, similar to when a multitrack tape master is cleaned up before it is sent out to mix.

B) Check that all edits and punches are clean, put in crossfades if necessary, and make sure there are no clicks and pops.

This is simply considered good Pro Tools etiquette, and greatly appreciated by all who follow you.

C) Consolidate tracks into solid audio starting from the beginning of the session when you are completely finished editing them.

Consolidating tracks improves session playback, and lessens the number of audio files and crossfades which simplifies archiving and restoration. -Starting from the beginning of the session will allow tracks to easily be used with other DAW's, and is a second way to confirm sync. Definitely insure there are no clicks and pops

before consolidation. It can be helpful to keep an unconsolidated version in the playlists.

D) Delete all tracks that are not needed for the next session.
This will also make the session more manageable.

E) Delete all playlists that are not needed for the next session.
Depending on your working style, it is possible for the playlists to become very cluttered and unmanageable. To make it easier to find alternate takes in the future, delete those you don't need.

F) Remove all unused audio files before closing the session.
Doing this after doing the above two items will really clean out all the files in the session you were no longer using. This makes the session even more manageable, lessening the number of files for archiving and restoration. (Caution: Do NOT delete unused audio files. This is something you should do ONLY when you fully understand the command after reading the manual. This command will permanently ERASE files from your hard drive and cannot be undone.)

Organization:

A) Put tracks in an order that makes sense to you (e.g. drums, perc, bass, gtrs, etc) Possibly in the order you would organize them on a tracksheet or console (e.g. drums, bass, gtrs, etc.). When tracks are grouped in this manner it makes the next operator's job much easier while they're trying to get a feeling for what's in the session so they can go to work. (See example tracksheet.)

B) Keep the Aux Input returns of submixed tracks (e.g., BG Vocals) adjacent to the source tracks. Along with labeling the busses, this makes it much easier to track the routing of the audio.

C) Place FX Returns (Aux Inputs) and Mix Bus (Master Fader) preferably to the right and bottom, or optionally at the left and top. This makes it much easier than if they are scattered about the session.

D) Leave any optional tracks showing, but de-activated muted and clearly labeled in the comments as to their status.

E) Deactivate, mute, hide and generally move to the bottom/far right any remaining tracks that are no longer being used, but are being left for reference. As tracks accumulate and multiple versions of the same instruments begin to appear, this is the clearest way to communicate these tracks are no longer being used. Usually they are just being kept for reference purposes. Clearly label in the comments section why they are not being used.

F) Keep all tracks that are to be used in the next session showing and essentially to the top/far left. When the next operator opens the session, this easily

communicates which tracks are currently active. If tracks are hidden that are playing, especially in larger sessions, it can really slow things down when the operator is trying to locate something.

G) Leave comments showing for the next engineer to see when opening the session.

APPENDIX II - Master Session Guidelines

Creating a new Master Session:

A) The session should be labeled Song_Title-Master .

Keeping the main session always labeled as the Master communicates to everyone that this is the session to work on. To keep a safety of the session before working, make a copy and place it in the Old Sessions folder.

B) .WAV is the recommended audio file type for compatibility with all DAW systems. WAV is currently the most universally accepted audio file format for hard disk based recording systems.

C) Enforcing Mac/PC Compatibility is recommended to improve session interchange between all Pro Tools systems. As more PC based systems come online this will become more important

D) Save the session to a level on your audio hard drive where you and future operators can locate it. A few things to watch for are unintentionally saving the session to the Session, Audio or Fade folder of another session, or the CPU's hard drive, which might be difficult to find later.

E) Create some form of tempo map in the conductor track. This should be one of the first things done during the basic tracking session, or at least at the earliest possible stage. You can simply place a single tempo marker at the beginning of the song, use Beat Detective to create a Tempo Map, or import from a MIDI sequence. Editing in bar/beat grid mode is one of biggest time saving aspects of Pro Tools. If there is no tempo information, this benefit is lost

F) Create Memory Location markers of song's arrangement. This may be imported with the tempo map from a MIDI sequence. This allows all operators after you to quickly understand the structure of the song and easily move about.

G) Always record or create an audio click track. Keep at top of session if possible (shown or hidden). The Click plug-in with Pro Tools 6.0 can receive broadcast tempo data, and with earlier versions you should always create or record an audio click track.

H) Include key and modulation information in Get Info. It's nearly essential when tuning tracks, just as tempo information is useful when setting delay times. Give key with additional accidentals. Example: Key: G min w/ A, C# . Key and modulation info may also be placed in markers track.

APPENDIX III - Slave Session Guidelines.

Creating a new Outgoing Slave Session:

A) The session should be labeled with the song title, a description of its purpose, and the word Slave (e.g. Song_Title-String Slave). This communicates that this is not the Master and does not contain all the original tracks, and what new tracks it will or does have. The same convention is also used with tape.

B) Consider the receiving system so the Slave will open properly. By enforcing Mac/PC compatibility and keeping the track count at 24 or less your session will open on all PT systems. See System Configuration Chart.

C) Building a Slave session from a cleaned out Master streamlines the process of keeping many of these very important items:

- 1) Include the tempo map. It can be imported with the Import Track function.
- 2) Include the Click plug-in track, or the audio click track. Keep at top of session if possible (shown or hidden).
- 3) Include the Memory Location markers.
- 4) Include key and modulation information in Get Info...
- 5) The start time and frame rate must be the same as the Master's.

D) Include separate reference tracks of instruments the session is being sent out to have overdubbed if applicable. So the part being replaced (e.g. Synth Strings) can be referenced and muted during the overdub session.

Creating a Returning Slave Session:

A) The final results of all work done in the Slave sessions should be transferred back to the Master session. This is the key to keeping track of all the final elements of the production and the same convention used with tape reels.

B) Return all the tracks that were in the Slave session when you received it. This is so all the new tracks can be heard together with the tracks that were referenced when work was done on the Slave, and it's important to confirm sync when importing the new tracks.

C) Make sure the session start time is the same as when you received the session, or note in the Session Info Document if not.

D) Clearly label in the comments section all the tracks to import back into the Master session, as well as listing them in the Session Info Document.

E) Make note of changes or edits done to the original tracks of the Slave in the Session Info Document so they can be imported or reproduced in the Master. While working, changes are sometimes done to individual tracks, sub-mixes, or the entire song structure of the original Slave tracks that must be imported or reproduced in the Master when the new tracks are imported.

F) Include your name and contact information in the Session Info Document for the receiving studio if they have any questions.

APPENDIX IV - Source Sessions

Creating a Source Session:

A) The session should be labeled with the song title, a description of its purpose, and the word Source (e.g. Song_Title-Ld Vox Source).

B) The session should be saved to the Source Sessions folder. Once a session is retired it should be moved from the top level of the session folder to eliminate clutter and confusion about which session is the current one.

APPENDIX V - Mix Session Guidelines

Creating a Mix Session:

A) The session should be labeled with the song title and the word Mix (e.g. Song_Title- Mix). To distinguish it from the Master, which may have plug-ins, and tracks, you wish to keep, but not want to send to the mixer.

B) Print Final Rough Mix labeled with song title and the date on a pair of tracks at the top of the session. It is standard to send a rough mix out when sending multitrack masters out to be mixed. With Pro Tools, you can make it even easier for the mixer by printing the rough on a pair of tracks (or by bouncing and importing it) into the session.

C) If volume automation is used to fade-in or fade-out of regions, then replace it with created audio fade-ins and fade-outs. One of the first things most mixers do is turn off the automation when mixing to a console, or delete all of it if mixing in Pro Tools. Following this guideline is the only way you can be sure the intended fades are maintained.

D) Use Mute Regions instead of muting with automation to mute audio tracks. (See part C above.) This also allows you to mute parts the producer isn't sure whether they'll want in or out. This also allows the mixer to easily find them.

E) Leave any automation the producer wants the mixer to use (e.g. BG vocal blends, panning) and label it clearly in the comments. Make sure the mixer knows why it's there and how they are supposed to use it.

F) Contact the mixer regarding whether you should leave the remaining nonessential automation in the session or delete it. Some mixers prefer to reference all the automation before deleting it, while others prefer that it be deleted. If you can't contact the mixer the safest option is to leave it.

G) Before sending the session out to mix, look it over a few more times to double-check that you have these very important items:

- 1) Every track is there that is supposed to be.
- 2) All parts are there that are supposed to be on each track.
- 3) All frys have been completed.
- 4) All comps (composite tracks) are completed and clearly labeled.
- 5) The correct lead vocal is there and VERY clearly labeled.
- 6) All tuned tracks have been printed to another track and are clearly labeled as tuned (it is sometimes useful to leave untuned versions of tracks that were tuned). Never send a session out to be mixed without printing the tuned tracks. You may wish to correct any delay caused by tuning process. Note in comments if it's corrected or if you wish to leave delay.
- 7) If the lead vocal is tuned, always leave a clearly labeled untuned version of the vocal. This gives the producer and mixer the option to switch to the untuned track for any sections they prefer that way.

H) Plug Ins

- 1) All essential (i.e. special effect) plug-ins should be printed to another track. If your plug-ins have radically processed the sound from the un-effected track and that sound has become integral to what that track now is, you should definitely print them to another track. If, for any reason, the

receiving system can't play back these plug-ins, an important element will be lost from the production. Do not assume other Pro Tools systems will have even the most common plug-in if it is essential to your sound.

2) Keep unprocessed versions of printed tracks in the session clearly labeled. Leave plug-ins and settings so the mixer may process differently. Deactivate, mute, hide and generally move them to the bottom/far right. If the session gets too large unprocessed tracks can reside in an Auxiliary session where they may be imported to the mix session as needed.

3) Leave in only nonessential plug-ins the producer would like the mixer to reference and remove the rest. These you should not print. If the mixer has these plug-ins in their system, they can reference them, and afterwards deactivate them. The rest of the plug-ins should be removed, because, after all, this is what the mixer has been hired to do.

APPENDIX VI - File Management and Storage

File Management and Storage (recommendations for organizing session folders for efficient session transfer):

A) When sending session out there should be only one session file showing in the main session folder. This clearly communicates that this session is the session to work on.

B) Additional session files should be stored in folders to prevent confusion about which is the current session. Keeping the top level of the session folder organized eliminates clutter and makes it easy to find various sessions.

C) To keep your sessions organized we recommend using the following folder names:

- Old Sessions – for all non-current sessions.
- Source Sessions – for all retired source tracks.
- MIDI Files – tempo maps, MIDI sequence files, etc.
- Rough Mixes
- Final Mixes

D) All of the session's audio files should reside in the Audio Files folder in the same session folder as the session file itself. Or if the audio files are divided between drives there should be only one session folder containing an Audio Files and Fade Files folder per drive. This is essential to simplify backups and copying of session data.

E) For transferring sessions between studios during the production process we recommend saving session data to CD-R's, Firewire drives, SCSI drives or DVD-

R's for their universality. These formats do not require third party software or external hardware other than the receiving system's computer. Essentially insuring that any studio you send them to can access them.

F) Always keep a copy of original the entire contents of the session folder (Session File, Audio Files, Fade Files, etc.) in your possession when sending a session out. This serves as a safety in case the data is lost or damaged.

G) After preparing a session to send out (especially when sending out for mix) we recommend that you use the Save Session Copy In... method. This will insure that all the files from your session are included, while at the same time eliminating any files that you are not using. This will give you a smaller session which will be easier to save to your selected media.

Follow these steps:

1. Save a new session with the Save As... command.
2. Give it a different name than your original session.
3. Choose Select Unused Regions from the Audio Regions list pop-up menu.
4. Choose Clear Selected from the Audio Regions list pop-up menu.
5. Click Remove. (Do NOT click Delete)
6. Choose Save Session Copy In...
7. Select Enforce Mac/PC Compatibility.
8. Select Save All Audio Files.
9. Save session to a different hard drive than the one the original session resides on. The CPU hard drive can be used if necessary.
10. Remove original session's drive from desktop.
11. Confirm that the new session Opens.
12. Test playback of session from top to bottom to confirm all files play.
13. Copy this new session to the media you're going to send it out with.

H) For final delivery of sessions see the Master Recording Delivery Recommendations at www.grammy.com.