SAS® Marketing Operations Management 6.0 R14

Administrator's Guide

SAS® Documentation

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SAS® Marketing Operations Management 6.0 R14: Administrator's Guide

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Table of Content

1. Configuring Solutions for End Users

This section summaries basic configuration required for the solutions to work for a tenant (client). Make sure the solutions are configured before the end users started using the system.

1.1. Tenant Configuration

To setup tenant related setting please refer to section - Settings.

1.2. Dashboard

1.2.1. Virtual Directory for Dashboard images

1. Create a virtual directory "DashboardImages" pointing to outbox (Path specified during Tenant creation).
2. Two-machine configuration: Create a virtual directory "Dashboard Images" pointing to "<InstallDir>\DashboardImages" folder on SAS Marketing Operations Management solution machine. If "<InstallDir>\DashboardImages" folder is not present create this folder.

To configure a Dashboard for a tenant please refer to section – Marketing Dashboard – Administration.

1.3. Digital Library

1.3.1. Cataloger

Make sure the cataloger mount point is created for the tenant, for further cataloger configuration details please refer to the section – Cataloger setting.

1.3.2. Digital Library

Configuration related to Digital Library can be "Solution default" and "User Personalized". If the user does not provide preferences then the application settings are applied. To setup solution default for tenant please refer to section - Digital Library - Se ttings.

1.4. Marketing Workbench

Following are the important steps in configuring the Workbench solution:

- Giving Launch permissions to ASPNET users – For consolidation process of .PDF, .DOC and .XLS files we have to give launch permissions to ASPNET user on the services machine.

- Add System Vault for Marketing Workbench, the steps are detailed in section - **Configuring System Vault for Workbench**.
- Configure Resource Types; the steps are detailed in section - **Configuring Resource Type**
- Configure Task Types; the steps are detailed in section - **Configuring Task Types**.
- Configure Deliverable Types; the steps are detailed in section - **Configuring Deliverable Types**.
- Configure Project Types; the steps are detailed in section - **Configuring Project Types**.
- Configure Brief Types; the steps are detailed in section - **Configuring Brief Types**.
- Configure Working Days and Working Hours settings; the steps are detailed in section - **Configuring Working Days and Working Hours settings.**

1.5. Strategic Planner

Please refer to the Strategic Planner administration guide to configure Planner – Strategic Planner Administration.

1.6. Approval

To use Approvals the following steps need to be performed:

- Giving Launch permissions to the ASPNET user – For consolidation process of .PDF, .DOC and .XLS files we have to give launch permissions to ASPNET user on the services machine.

1.7. Managing facets and Named Hierarchy

Several solutions use standard facets and predefined named hierarchy these can be configured using Schema Designer.

- For adding new facets or modifying existing facets please refer to section - **Facet Types.**
- For adding new named hierarchy or existing named hierarchy please refer to section - **Named Hierarchies.**

1.8. Controlling end user access to the Solutions

Administrator can restrict access to the solution and add new solution to the left bar using Left bar configuration tools, to configure the left bar please refer to the section - LEFTBAR – Configuration.

1.9. Configuring forms shown in Planner and workbench.

Strategic Planner and Marketing Workbench display forms to capture data from the end users. Layout of these forms can be changed, please refer to section Form Configuration for more details.

2. Schema Designer

2.1. Overview

An entity type represents an entity involved in a real world business process. Entity type is one of the standard objects that the object manager provides. This indicates the type of entity to which the entity instance belongs. The definition of an entity type will also include the definition of the database table where the instances of this entity type will get stored.
The business/additional information that can be associated with an entity is termed as 'Facet'. The facet type defines a type of business information. For e.g. For Asset, Brand Info, Product Info can be considered as Facet Type.
Definition of Facet Type will also include the definition of the database table where the instances of this facet type will be stored.

The Schema Designer solution allows the administrator to manage entity type, facet type and the relationship between them. This application has two modes of operation – Authorized and Restricted. The mode of operation can be changed in the Tenant Configuration (Refer to Installation Guide). By default the restricted mode is applicable and following are the list of restrictions:

Object Type	Operations		
	Create	**Modify**	**Delete**
Entity Type (Built-in)	Not Allowed	Not Allowed	Not Allowed
Entity Type (User defined)	Not Allowed	Not Allowed	Not Allowed
Facet Type (Built-in)	Not Allowed	Not Allowed	Not Allowed
Facet Type (User defined)	Allowed	Allowed	Allowed
Named Hierarchy (Built-in)	Not Allowed	Allowed	Not Allowed
Named Hierarchy (User defined)	Allowed	Allowed	Allowed

Relationships	Operations	
	Create	**Delete**
Entity-Entity (Built-in to Built-in)	Not Allowed	Not Allowed
Entity-Entity (Built-in to User defined)	Allowed	Allowed
Entity-Facet (Built-in to Built-in)	Not Allowed	Not Allowed
Entity-Facet (Built-in to User defined)	Allowed	Allowed
Facet-Facet (Built-in to Built-in)	Not Allowed	Not Allowed
Facet-Facet (User Defined to User Defined)	Allowed	Allowed

Facet-Facet (User Defined to Built-in)	Allowed	Allowed

2.2. Getting Started

After signing in, click on the '**Schema Designer**' link on the Dashboard screen on the left pane under '**Configuration**'. On the Schema Designer screen there are three links on the left pane **(Figure 1)**.

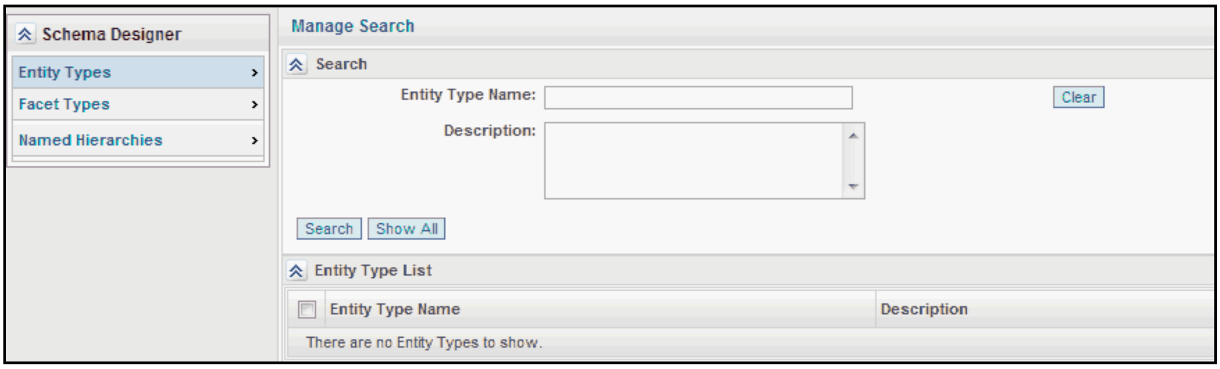


Figure No.1

2.2.1. Entity Types

A search screen for the entity is displayed by default when Schema Designer is launched. The screen has two sections **(Figure 2)**:

- **Search**: Enter the entity type name and its description and search for it by clicking on the '**Search**' button. By clicking on the '**Show All**' button all the entity types present in the system will be displayed. To clear the search criteria click on the '**Clear**' button.
- **Entity Type List**: In this section the searched entity types will be displayed with its description. In the restricted mode deleting and creating entity types is not allowed.

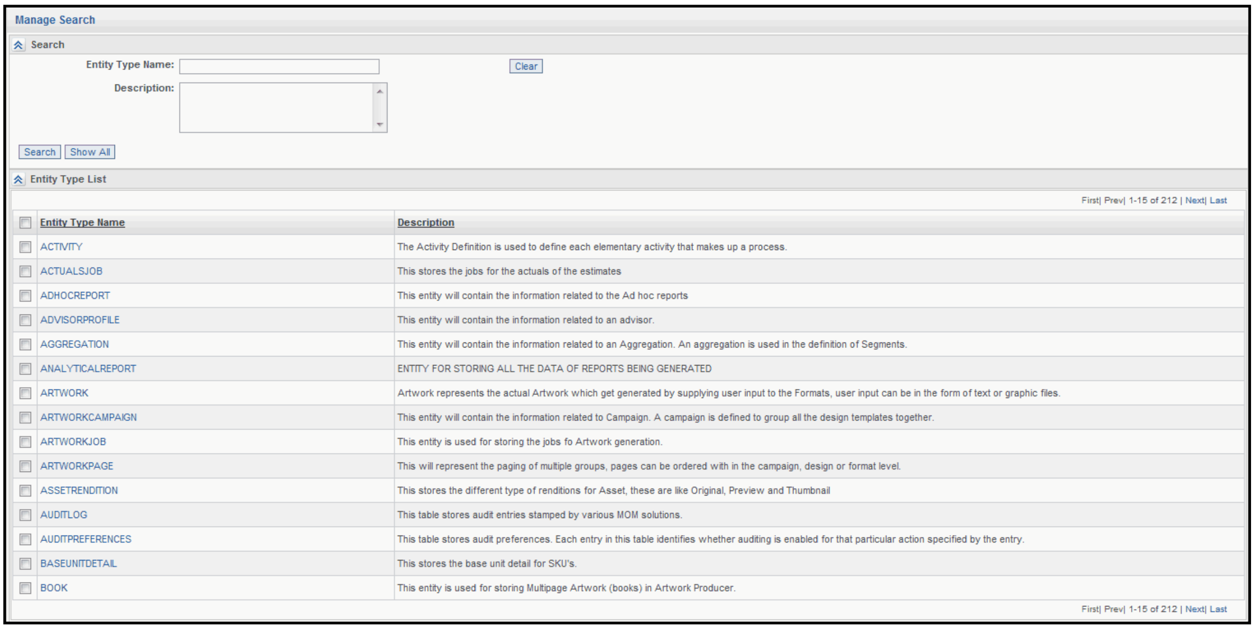


Figure No.2

Viewing Entity Types

Click on the entity type name link to view the details. A screen with the following sections is displayed **(Figure 3)**:

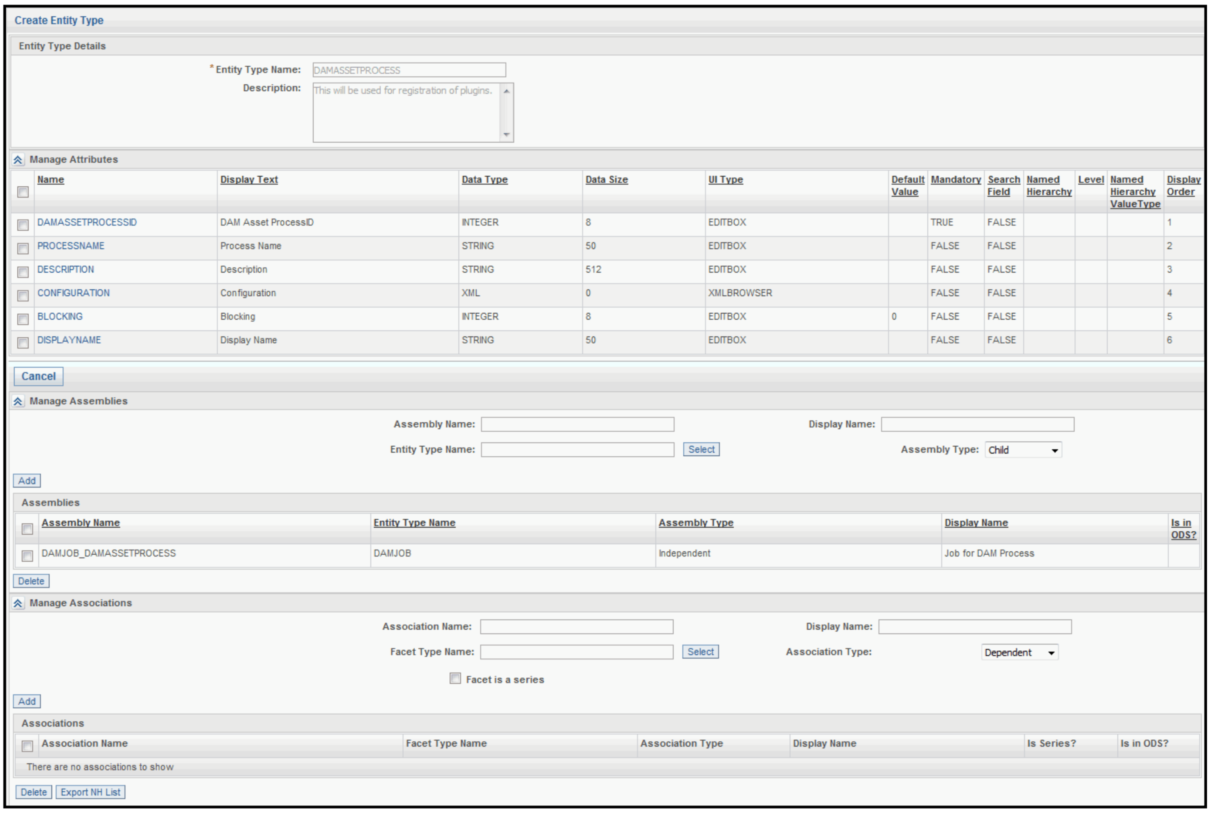


Figure No.3

- **Entity Type Details**: The entity type name and its description is displayed.
- **Manage Attributes**: The attributes for the entity type can be viewed. Each row displays the attribute details such as name, display text, data type, data size, UI type, default value, whether mandatory or not, whether a search field or not, the named hierarchy which is associated with the attribute is displayed, level, the named hierarchy value type and the display order. Each attribute name in the list has a link to view the attribute details.

Schema Designer supports the following data types:

Data Type	Description
DATETIME	Stores date along with time
CURRENCY	Stores currency type of data
DECIMAL	Stores number with a decimal point
INTEGER	Stores a whole number without fractional part
FILE	Stores a file
BINDER	Stores multiple files
XML	Stores XML data
FLOAT	Similar to decimal

STRING	Stores fixed sized string
TEXT	Stores large text
BOOLEAN	Stores Boolean i.e. 0, 1

- **Manage Assemblies**: An assembly is the relationship between two entities in the system. Assemblies can be added by entering the assembly name, display name, selecting an entity type name to which the current entity type will be associated with and selecting the assembly type from a drop down list. After entering all the details click on the '**Add**' button.
- **Assemblies**: List of assemblies for the current entity type will be displayed. An assembly can be deleted by selecting it and clicking on the 'Delete' button. Editing of assemblies is not allowed.
- **Manage Association**: In this section a facet can be associated with the entity type. A new association can be added by entering details such as the association name, display name, facet type name can be selected by clicking on the '**Select**' button. Select the association type. The association type can be either independent or dependent; if the association type is dependent then when the instance of entity is deleted the associated instance of the facet gets deleted. After entering all the details click on the '**Add**' button.

  Note: The 'Association Name' must be without a space.
- **Associations**: A list of associations for the current entity type will be displayed. An association can be deleted by selecting it and clicking on the 'Delete' button. Editing of association is not allowed.

The selected association can be exported by clicking on the '**Export NH Value**'.

2.2.2. Facet Types

To manage facet types click on the '**Facet Types**' link on the left pane of Schema Designer. This screen has two sections **(Figure 4)**:

- **Search**: Enter the facet type name and its description and then search for it by clicking on '**Search**' button. Clicking on the '**Show All**' button displays all the facets present in the system. To clear the search criteria click on the '**Clear**' button.
- **Facet Type List**: In this section the searched facet types will be displayed with its description. A selected facet can be deleted by clicking on the 'Delete' and create a new facet by clicking on the '**Create**' button.

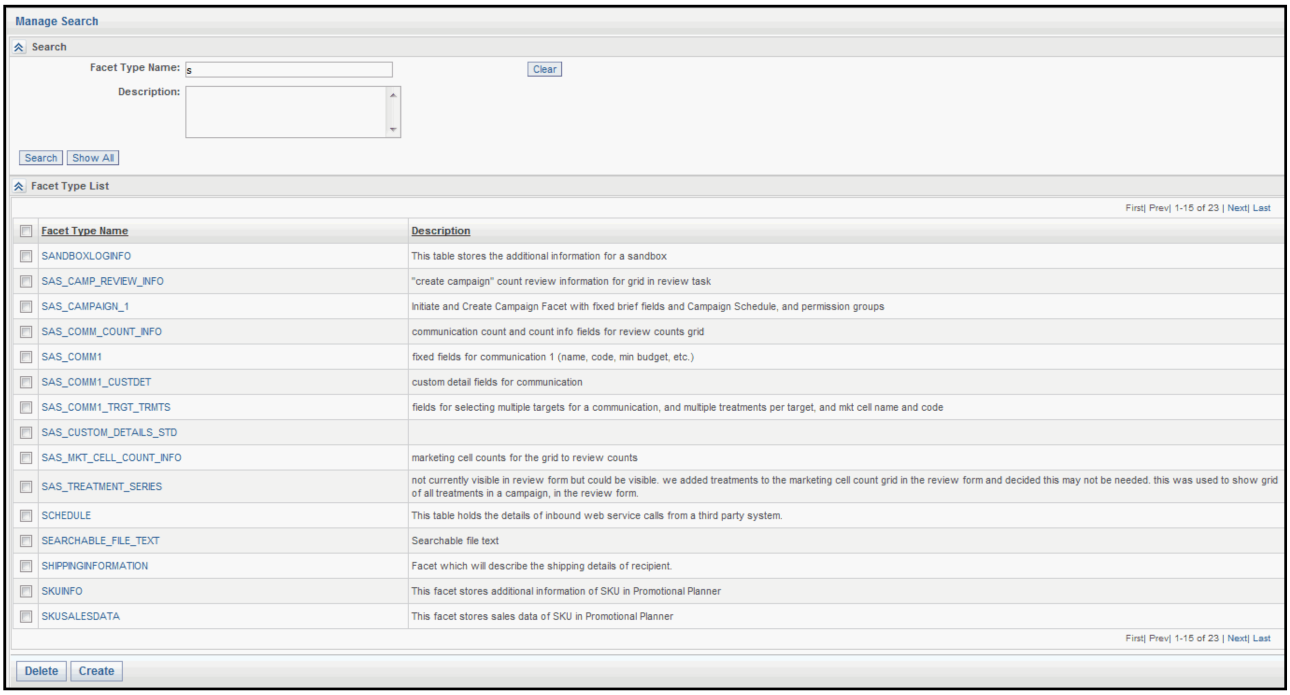


Figure No.4

Creating a new Facet Type

Click on the '**Create**' button, a create facet type screen with the following sections are displayed **(Figure 5)**:

- **Facet Type Details**: Enter the facet name and its description.

  Note: The 'Facet Type Name' must be without a space.

- **Manage Attributes**: The attributes for the facet type can be added. Each row displays the attribute details such as name, display text, data type, data size, UI type, default value, whether mandatory or not, whether a search field or not, the named hierarchy which is associated with the attribute is displayed, level, the named hierarchy value type and the display order. Each attribute name in the list has a link to a screen, which allows modifying the attribute details by clicking on the '**Modify**' button or cancel the operation by clicking on the '**Cancel**' button. The following operations can be performed in this section:
  - o **Delete** - A selected attribute can be deleted.
  - o **Add** – An add attribute screen is displayed where details such as name, display text, data type (from the drop down list), data size, UI type (from the drop down list), the default value and the display order for the attribute is entered. The other details such as Mandatory, Primary Key and Search Field can be selected. Click on the '**Add**' button to add the Attribute or to cancel the operation click on the 'Cancel'. If a string attribute has a named hierarchy associated then the

user can select the named hierarchy and specify either the value from the tree to be stored or the whole path.

  - **Save** – Saves the new attribute.
  - **Cancel** – Cancels the operation.

- **Manage Associations**: In this section another facet type can be associated with the current facet type. A new association can be added by entering details such as association name, display name, facet type name can be selected by clicking on the '**Select**' button and select an association type from the drop down list. The association type can be either independent or dependent. After entering all the details click on the '**Add**' button.
- **Associations**: List of Associations for the current facet type will be displayed. Clicking on the checkbox adjoining it and then clicking on the '**Delete**' button can delete an association.

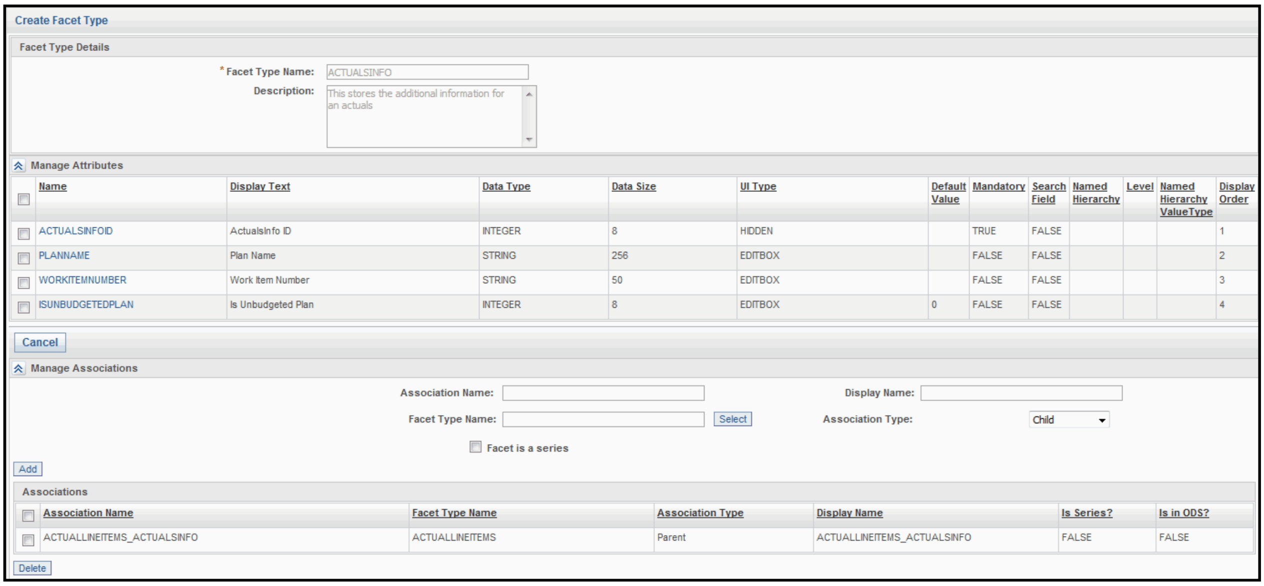


Figure No.5

2.2.3. Named Hierarchies

The need to maintain and work with various predefined categories of information is fundamental to any organization. E.g. lists of product families, directories, catalogs listing service providers like design agencies, printers etc.

This list or information should always be persistent, available, up-to-date and grammatically and semantically correct. All this should be centrally organized by the system.

For the above purpose we introduce the concept of named list to store list of information used by an organization. Named list is a name that is associated with a set of predefined values. This named list can then be associated with and shared by fields in entity types and facet types. A named list is created when one needs to provide a list of pre-defined values for a user to select from.

To manage named hierarchy in the system click on the '**Named Hierarchies**' link on the left pane of the Schema Designer. This screen has two sections **(Figure 6)**:

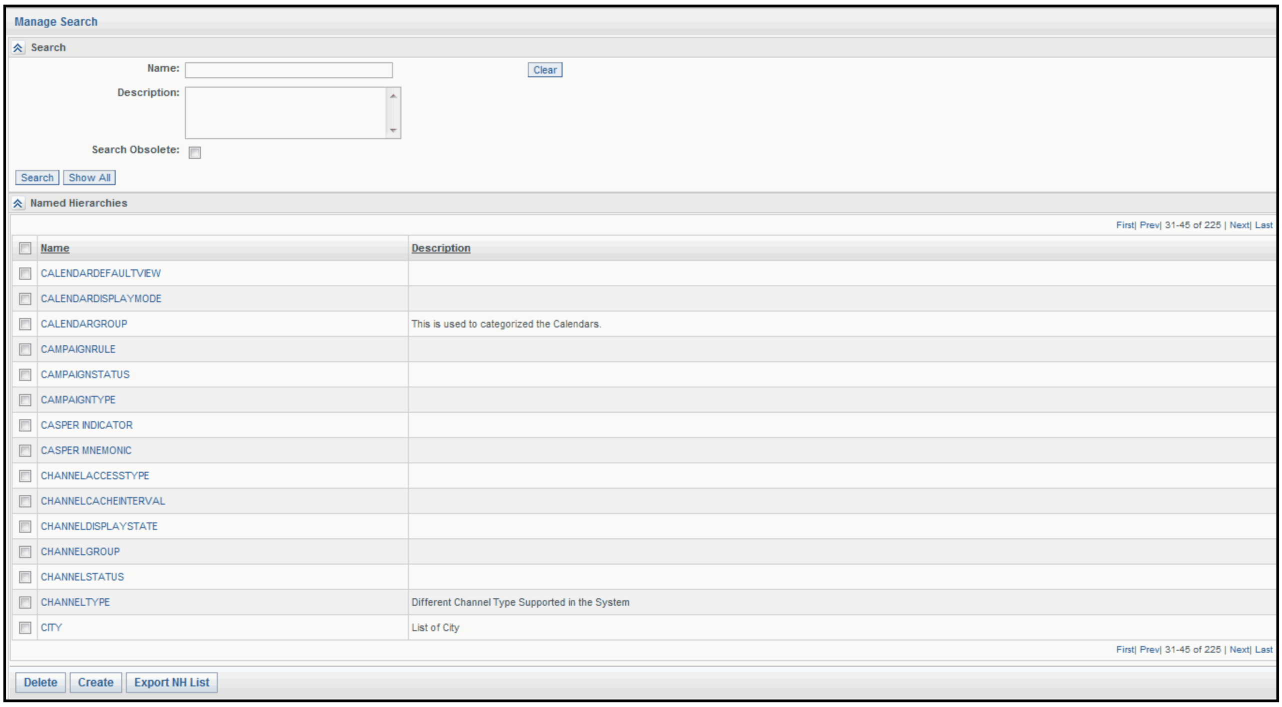


Figure No.6

- **Manage Search**: Enter the named hierarchy name and description and then search by clicking on '**Search**' button. Clicking on the '**Show All**' button displays all the named hierarchies present in the system. To clear the search criteria click on the '**Clear**' button.
- **Named Hierarchies**: In this section the searched named hierarchies will be displayed with its description. A selected Named Hierarchy can be deleted by clicking on the '**Delete**' button. To create a new Named Hierarchy, click on the '**Create**' button. Select the Named Hierarchy to be exported and click on the '**Export NH List**' (This creates an Excel sheet with all the values listed in the Named Hierarchy).

Creating a Named Hierarchy

To create named hierarchies click on the '**Create**' button **(Figure 7)**. Enter the name and description and click on the '**Save**' button.

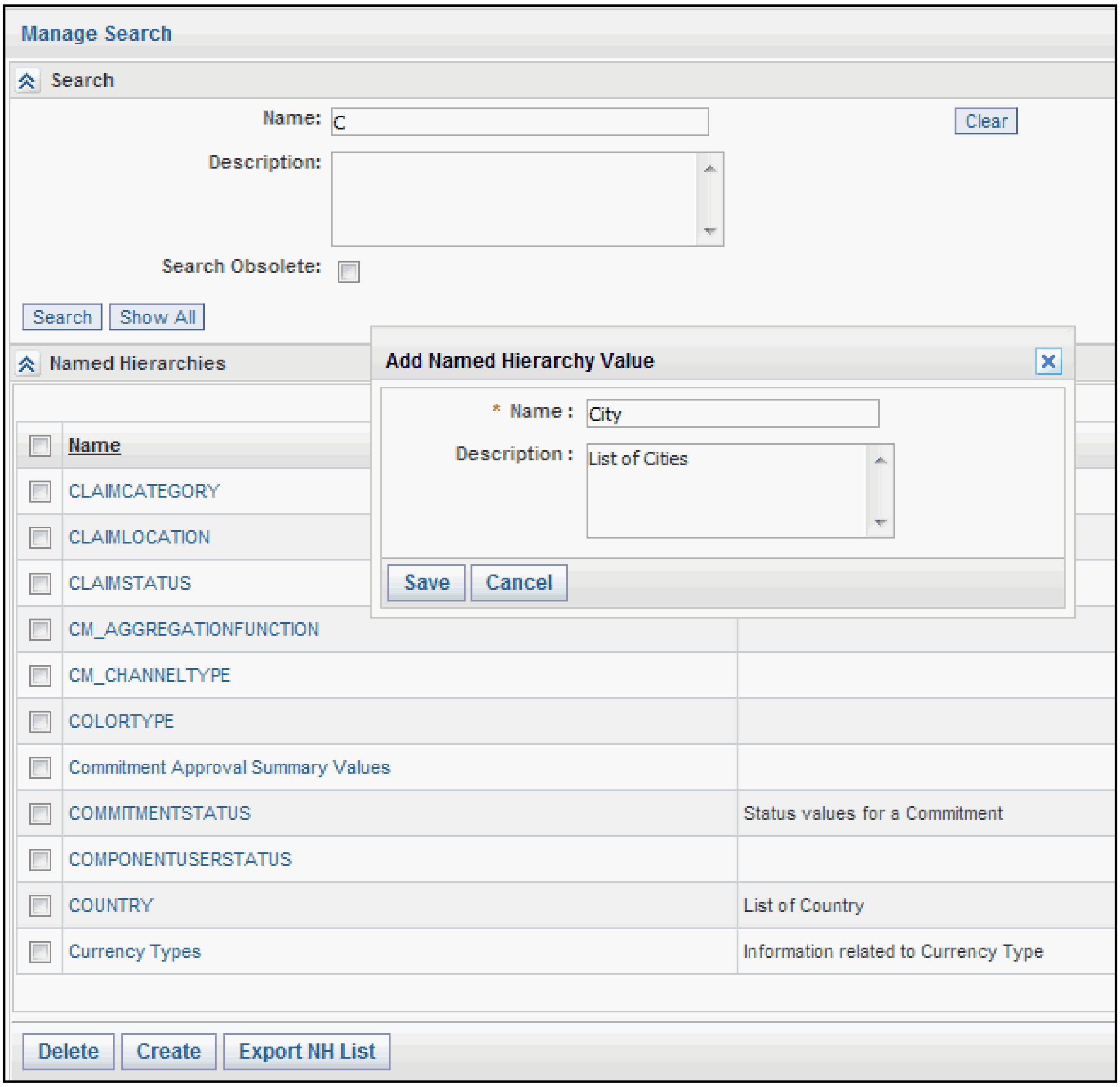


Figure No.7

A named hierarchy screen is displayed where the values can be added **(Figure 8)**.

Each named hierarchy in the list has a link, which displays the values under it. These values can be added and deleted. The administrator can also specify the order in which the value will be displayed to the end user, who can either be alphabetically or in the order it has been created or arranged. To achieve the ordering of the values click on the '**Set Order'** button.

Figure No.8

2.3. Example

Metadata needs to be attached to digital assets so as to have more information stored about the Asset in the Digital Library. A facet called 'Searchinfo' with the following fields needs to be available for the end user to enter details in:

Field Name	Data Type	UI Type	Searchable	Named Hierarchy
ID	Integer	Hidden	No	
Media Type	String	Dropdownlist	Yes	Yes (Associate the 'Media Type' Named hierarchy)
Title	String	EditBox	Yes	
Region	String	TreeView	Yes	Yes(Associate the 'Region' Named hierarchy)
Date_Published	Date	Calendar		

Copyright	String	Text Area	Yes	

To create the above facet, follow the steps below:

1. Create a Named Hierarchy 'Media Types' for the UI type 'Dropdownlist' with the following values **(Figure 9)**:
    a. Print
    b. Radio
    c. TVC

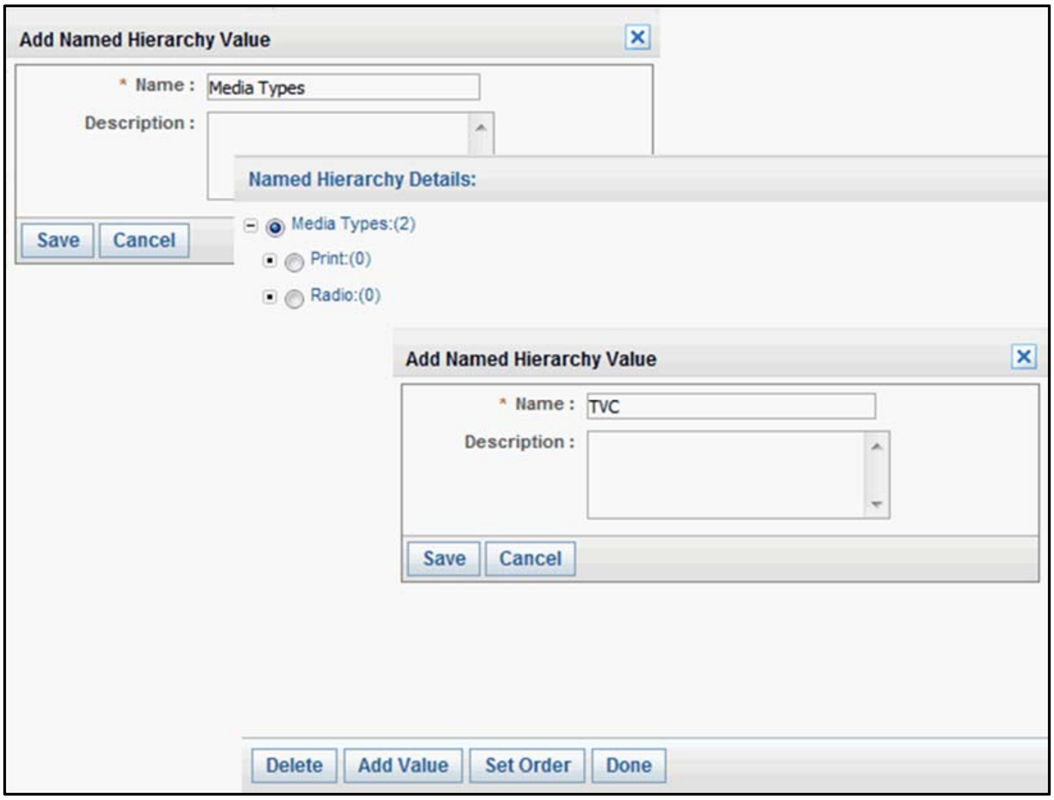


Figure No.9

2. Create the facet 'Searchinfo' with the fields mentioned in the above table. To add 'Media type' field which is a drop down list, attach the named hierarchy created above. The named hierarchy value type could be:
    a. Value – This means all the values present in the Named Hierarchy will be displayed.

b. Path – This means if there is a hierarchy created then only the first level of hierarchy will be displayed. This level can be expanded to see the next levels.

Similarly for the field 'Region' the Named Hierarchy can be attached and the type could be 'Treeview'. Once all the fields are added save the facet type.

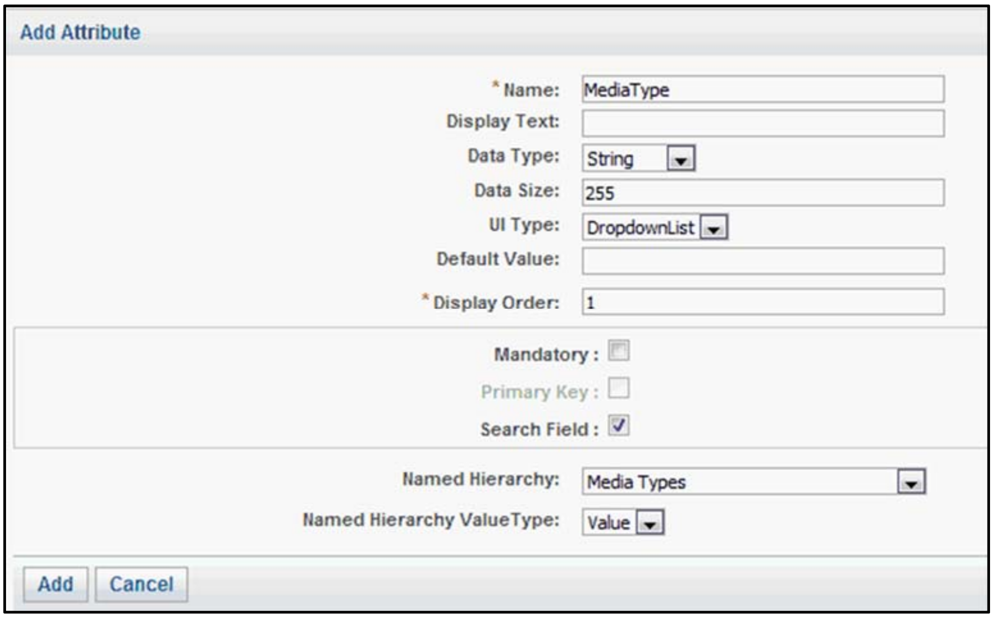


Figure No.10

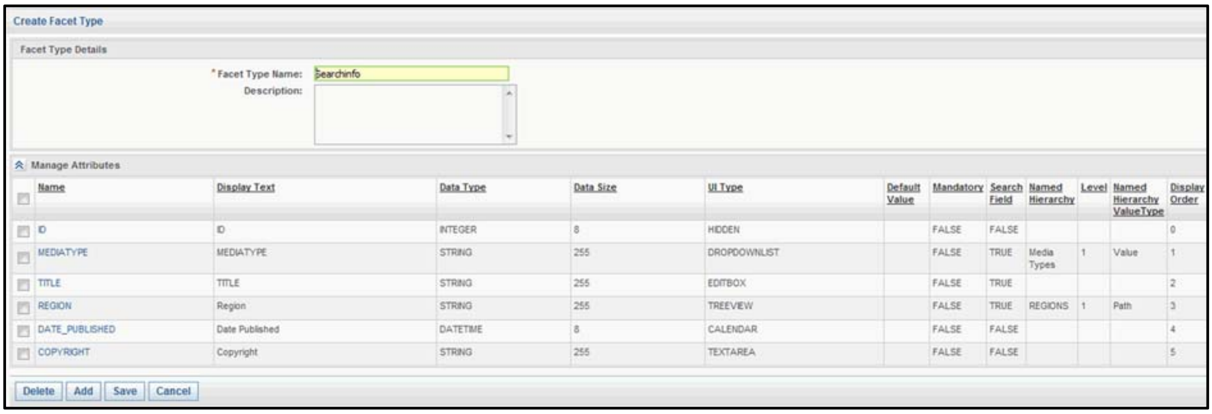


Figure No.11

3. After the facet is created it needs to be associated with an 'Entity Type'. For facet fields to appear for a Digital Asset the facet needs to be associated to the 'DIGITALASSET' Entity. To do so, go to the Entity Types and search for the 'DIGITALASSET' Entity. Go to the 'Manage Associations' section and enter the association name, display name and select the facet type name (the facet created above). Click on 'Add' to add the association. The association will appear the Associations section.

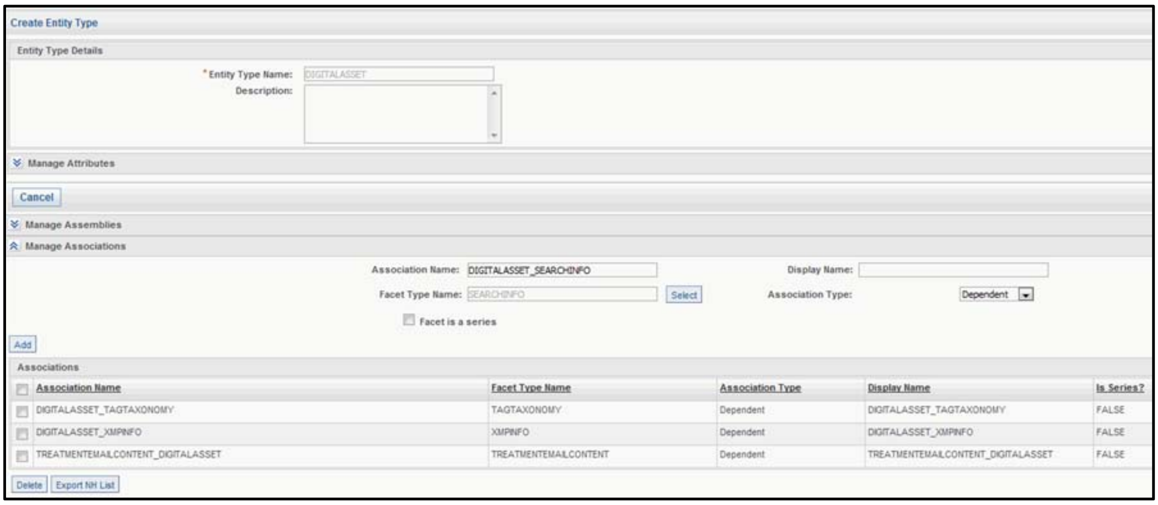


Figure No.12

The Facet is associated with the Digital Asset entity. It will now appear as metadata for digital assets.

3. Process Designer

Please refer to the Marketing Workbench Administration.

4. UI Framework

4.1. Overview

Modules such as digital library, strategic planner, approvals, administration, marketing workbench etc. display or capture information via forms on a solution page.

A form is a set of attributes arranged in a particular format to give meaningful information to the user. The forms can be editable or a read only based on the context of the operation performed by the end-user. The layout of these forms can be changed via the form utility.

4.2. Getting Started

After signing in, click on the '**UI Framework**' link on the left pane under '**Configuration**'. The application launches in a separate browser window with the list of solutions for which forms can to be configured. Each solution name has a link to view list of forms configured for the solution **(Figure 1)**.

Solution List

Name	Display Text
StrategicPlanner	Strategic Planner
MarketingWorkbench	Marketing Workbench
Approvals	Approvals
Administration	Administration
DAM	Digital Library
ResourceManagement	Resource Management
ArtworkProducer	Artwork Producer
CampaignManager	Campaign Manager
ClaimsManagement	Claims Management
PromotionalPlanner	Promotional Planner

Figure No.1

4.3. Form Configuration

Click on the solution name link to get the list of forms and widgets configured for the solution **(Figure 2)**.

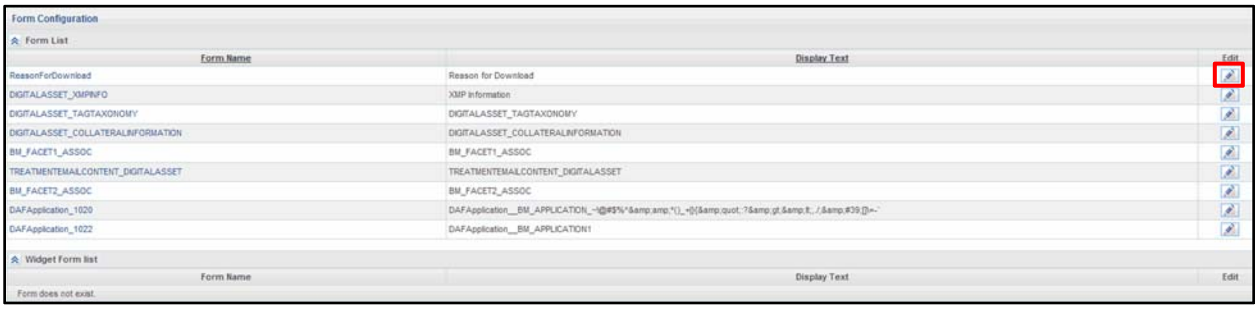


Figure No.2

Each row in the list displays the form name and the display text. Each form name has a link to change the layout of the form. To edit the form details click on the icon:

4.3.1. Editing the Form details

The form name is not editable as it is a unique name, the system will not accept a duplicate name. The following details can be edited **(Figure 3)**:

- **Display Text** – The text to be displayed.
- **Show form heading** – Select whether the heading for the form should be displayed.
- **Display form border** – Select whether the border for the form should be displayed.
- **Form Expand/Collapse image alignment** – Select from the options in the drop down list.
- **Buttons in Form** – Select whether the buttons in the form should be displayed.
- **View Audit History** – Select whether the audit history for this form should be displayed.
- **Additional section name** – An additional section name.
- **Additional section column layout** – Specify how many columns are laid out on the additional section.
- **Show Additional Section Heading on Read-Only Page** – Select whether the section heading for the additional section should be displayed on the read only page.
- **Show Additional Section Heading on Edit Page** – Select whether the section heading for the additional section should be displayed on the edit page.
- **Section Expand/Collapse image alignment** – Select from the options in the drop down list.
- **Display additional section border** - Select whether the border for the additional section should be displayed.

To save the form, click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button respectively.
To select a base entity or facet click on '**Select Base Entity**'. This is required only if a new form is being created.
To select related entities for the base entity click on '**Select Superset**' button.
its related entity allows the administrator to select attributes from the selected entity for the form.

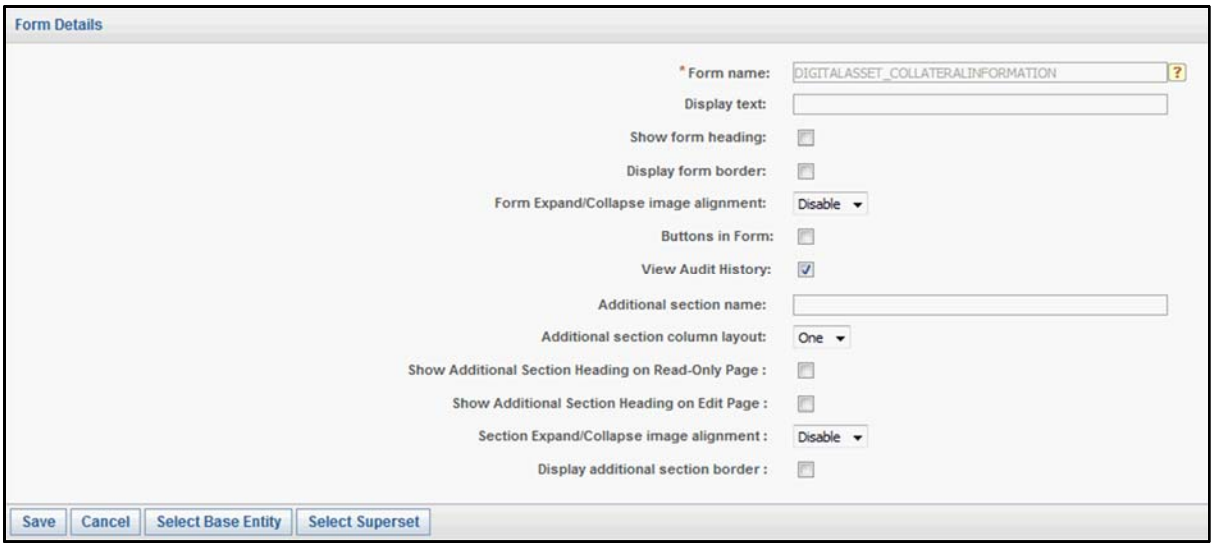


Figure No.3

4.3.2. Changing the Form Layout

Click on the form name link on the form list screen **(Figure 2)** to change the current form layout. A layout screen **(Figure 4)** is displayed. Once the fields are selected for display on the section they can be arranged on the form in a desired fashion by the drag and drop feature. The fields/attributes can be deleted or their properties can be edited. For each field/attribute properties such as label, help messages, instructions and other user interface properties can be specified.

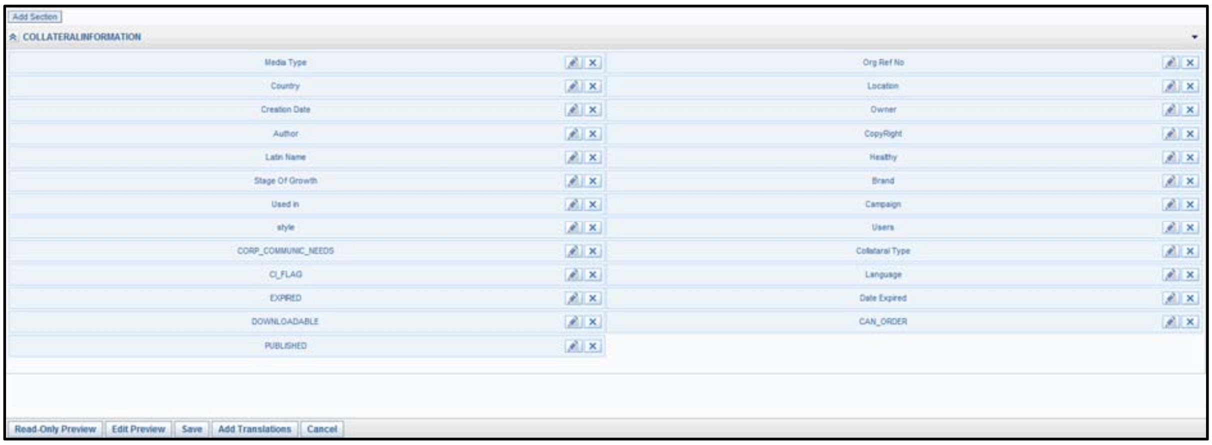
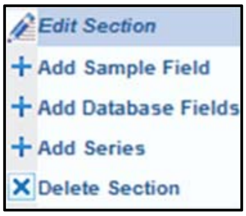


Figure No.4

The following operations can be performed on the form layout screen **(Figure 4)**:

- Add Section – A new section can be added.
-  - The fields/attributes can be edited.

-  - The fields/attributes can be deleted.
-  - The icon on the top right corner of the section header displays a menu with the following operations:

	**Edit Section** – Allows editing the section details
	Add Sample Fields – Add sample fields/attributes on the section. These are sample fields and will not be added or stored in the database. The sample field is used to generate mock-ups where the schema is not defined.
	Add Database Fields – Add fields/attributes from the selected business attributes for the form.
	Add Series – Form can be created and facet series can be added on the forms to be displayed in the solutions/applications.
	Delete Section – Delete the selected section (Only if the user has access to the section).

- **Read-Only Preview** – Displays the preview of the form when it is displayed in the read only mode.
- **Edit Preview** – Displays the preview of the form when it is displayed in an editable mode.
- **Save** – Saves the changes made.
- **Cancel** – Cancels the operation.

Adding a Section to the form

The form layout screen gives the user the ability to group attributes (fields) in a logical manner on the form by grouping them under a '**Section**'. A section is an area on a form where attributes can be grouped. To add a new section click on the '**Add Section**' button **(Figure 4)**.

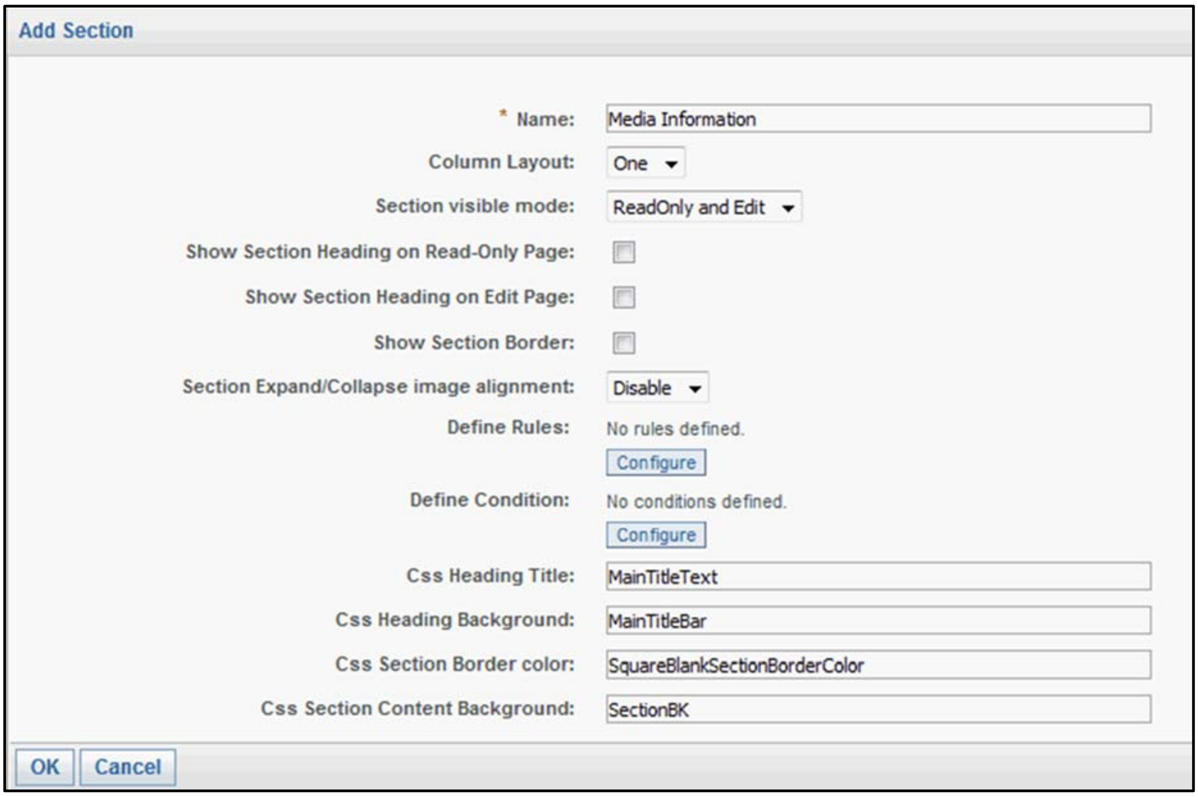


Figure No.5

Enter the following details on the add section screen **(Figure 5)**:

- **Name** – The section name.
- **Column Layout** – Specify how many columns are laid out on the section.
- **Section visible mode** – Select the mode the section needs to be displayed in:
    - Read Only and Edit
    - Read Only
    - Edit
- **Show Section Heading on Read-Only Page** – Select whether the section heading should be displayed on the read only page
- **Show Section Heading on Edit Page** – Select whether the section heading should be displayed on the edit page (page which is editable)
- **Show Section Border** – Select whether the section border should be displayed
- **Section Expand/Collapse image alignment** – The alignment of the image can be changed to left or right or the alignment can be disabled.
- **Define Rules** – During form configuration rules/roles can be set up for sections. For e.g. a certain role of users will be able to edit only a certain section of information on the form. The rest of the sections on the

form will be made read-only to them. Multiple rules can be set on a section of the form. For more information contact the Professional Services team.

- **Define Condition** – A condition can be set up for the visibility of the Section. For e.g. if the status is Active, only then should a section of the form be made visible. For more information contact the Professional Services team.
- **Css Heading Title** – Specify the presentation style for the header title by specifying the style sheet class.
- **Css Heading Background** – Specify the presentation style for the heading background by specifying the style sheet class.
- **Css Section Border Color** – Specify the presentation style for the border color by specifying style sheet class.
- **Css Section Content Background** – Specify the presentation style for the section content background by specifying the style sheet class.

After entering all the details save the new section by clicking on the '**OK**' button or to cancel the operation click on the '**Cancel**' button.

Adding Facet Series to the form

Facet Series: Schema designer supports entity to facet association as well as facet to facet association. The facet to facet association is called '**Facet Series**'.

The facet series can be added for the following solutions:

- Marketing Workbench
- Approvals
- Administration
- DAM

The sorting field and sort order for facet series can be set from here. After clicking on the '**Add Series**' link, an '**Add Facet Series**' popup is displayed **(Figure 6)**.

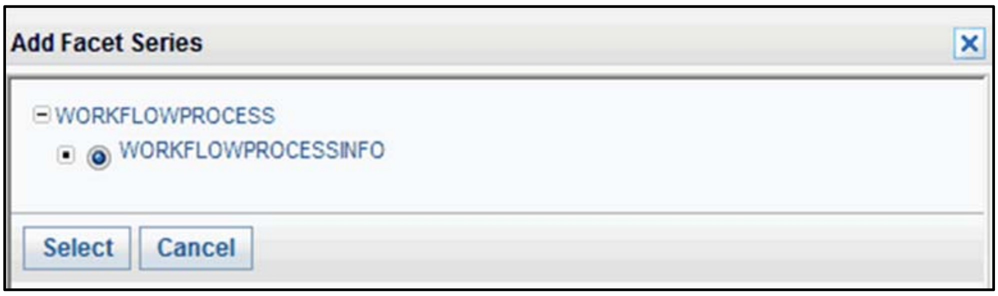


Figure No.6

Editing field properties in a Section on a Form

To edit the field properties click on  icon next to the field name **(Figure 7)**.

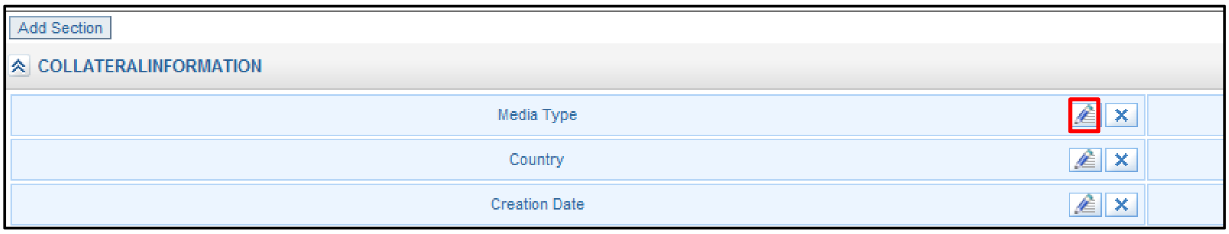


Figure No.7

An add field screen is displayed where the following field details can be modified:

For all content types Label, Default value, content type and UI type are standard fields which can be modified. The rest of the fields depend on the content type selected.

The fields can be displayed in the following modes:

- **Editable** - The end user views the field as an edit box.
- **Disabled** - The end user views the field in a disabled (grayed out) mode.
- **Read-only** - The end user views the field in read-only mode.
- **Hidden field** - The field is not displayed on the form to the end user.

The Label and Field properties can also be edited/modified.

Depending on the content type of the field the following fields can be edited:

1. **For content type 'String'/'Numeric' (Figure 8):**

   Select Series – Form control provides the facility to add fields of the UI Type Edit box on a form, which have pre-populated values from the respective Object ID Series. The users can configure these fields through the Form Configuration utility and associate the series from which the values have to be generated. These fields can be editable or read-only depending on the need of the application. For e.g. The Vendor Number field of the UI Type EditBox and whose number is Auto Generated derives its values from the Object ID Series VENDORNUMBER.

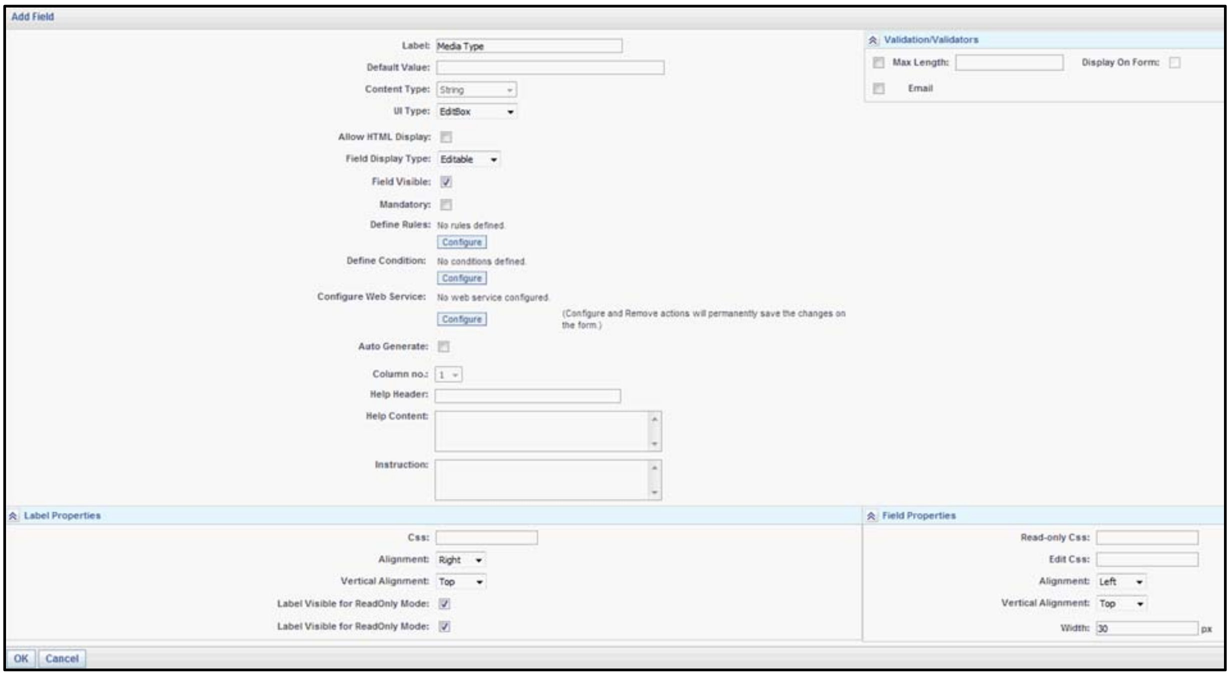


Figure No.8

2. **For content type 'DateTime' (Figure 9):** Form control allows the user to display time along with the date for any field. This needs to be configured in the configuration xml. By default only the date will be displayed. To display the date-time for a field, the date mode should be selected as 'datetime'.
   Date Dependency - Calculated date fields on a form are the fields where, the value of the date field depends on the value of some other date field on the same form. In such cases, the control itself calculates the date for the dependent field based on the date selected in the parent field. The calculation is based on the following settings for the field in UI Framework:
   a. **Field Name** – Name of the calculated field, for example: End Date
   b. **Depends On** – Name of the filed on which the calculation depends or is based on, for example: Start Date
   c. **Operation** – Increment / Decrement
   d. **Days** – Number of days by which the value has to be incremented or decremented, for example: 15 days
   e. **Months** – Number of months by which the value has to be incremented or decremented
   f. **Years** – Number of years by which the value has to be incremented or decremented
   g. **Consider Non-Working Days** – If the checkbox is not selected, the nonworking days will not be considered while calculating the next date. The non-working days will be skipped.

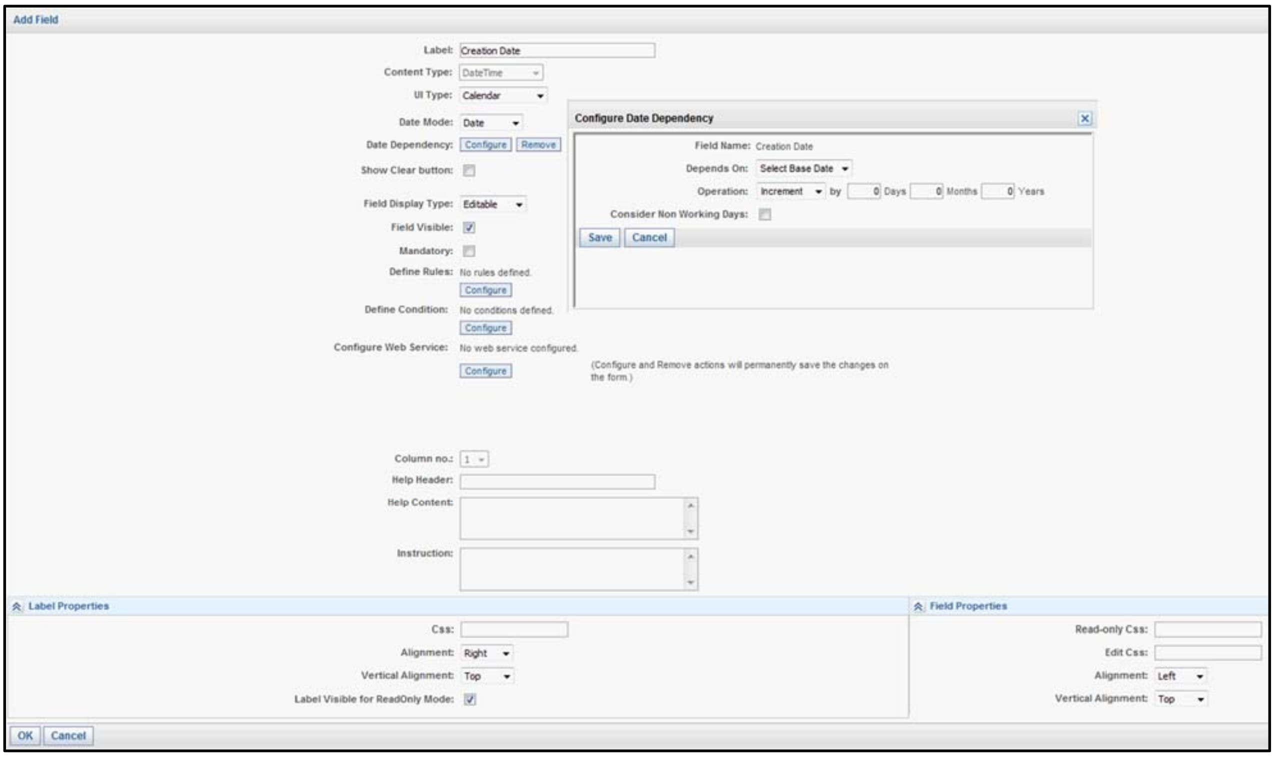


Figure No.9

3. **For content type 'Binder':**
   Form control provides the facility to upload and save single/multiple files. The field can be configured using Schema Designer and the form configuration utility. The fields can be editable or read-only depending on the need of the application.

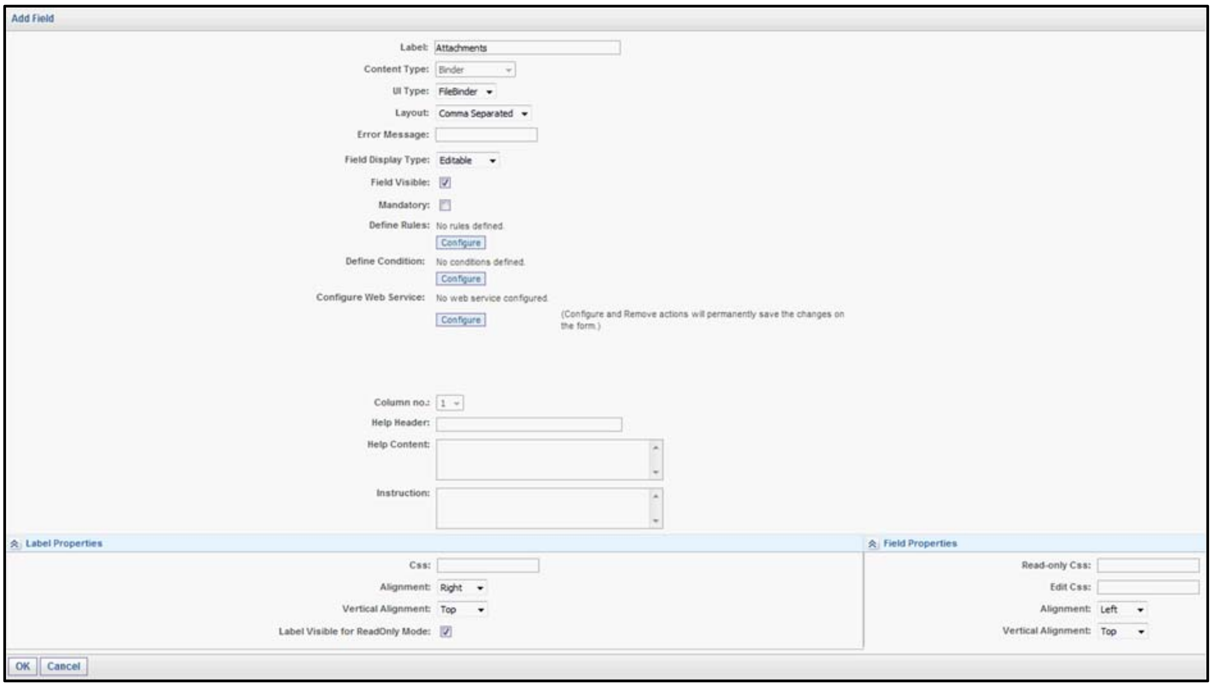


Figure No.10

4. **For content type 'Boolean':**
   Checkboxes can be configured for Boolean data type fields. In the Read-only mode of the form, these check boxes are disabled for selection. For the UI types Radio Button and Dropdown list the user can set the display text that needs to be associated with these values. The user can also set which field should be shown as a default selected while the form is being generated in 'Create' mode. In the configuration XML, the child 'Item' nodes will be created for that field. These nodes will have the display value that the user has specified and value either 0 or 1.

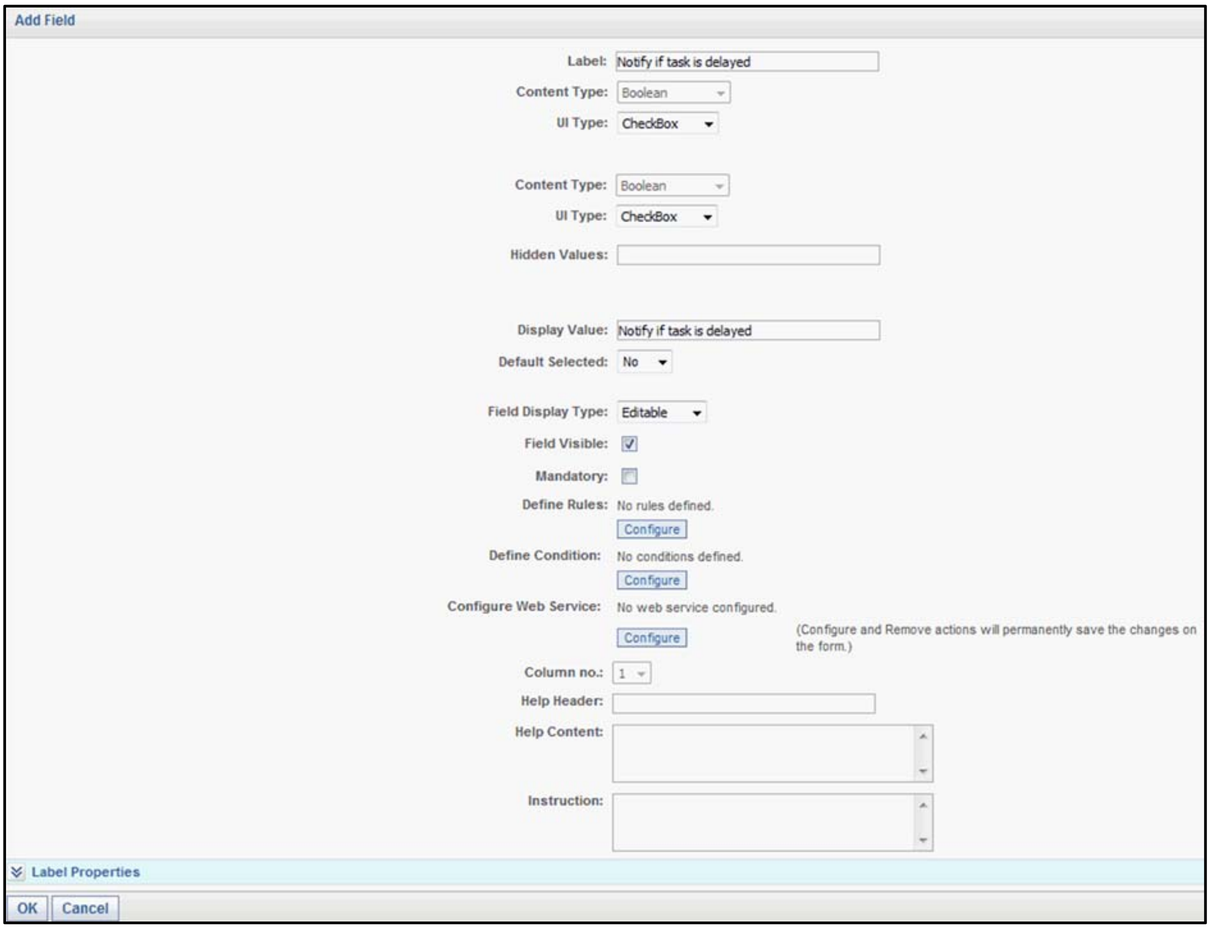


Figure No.11

5. **For content type 'Integer' (Figure 12):**
   Functionality is provided to configure whether formatting should be applied for specific fields. This is visible for the fields having data type - Integer, Float, Currency and Date types. If the checkbox is checked, then formatting is applied for the values of those fields when the form is being displayed in Read-only mode.

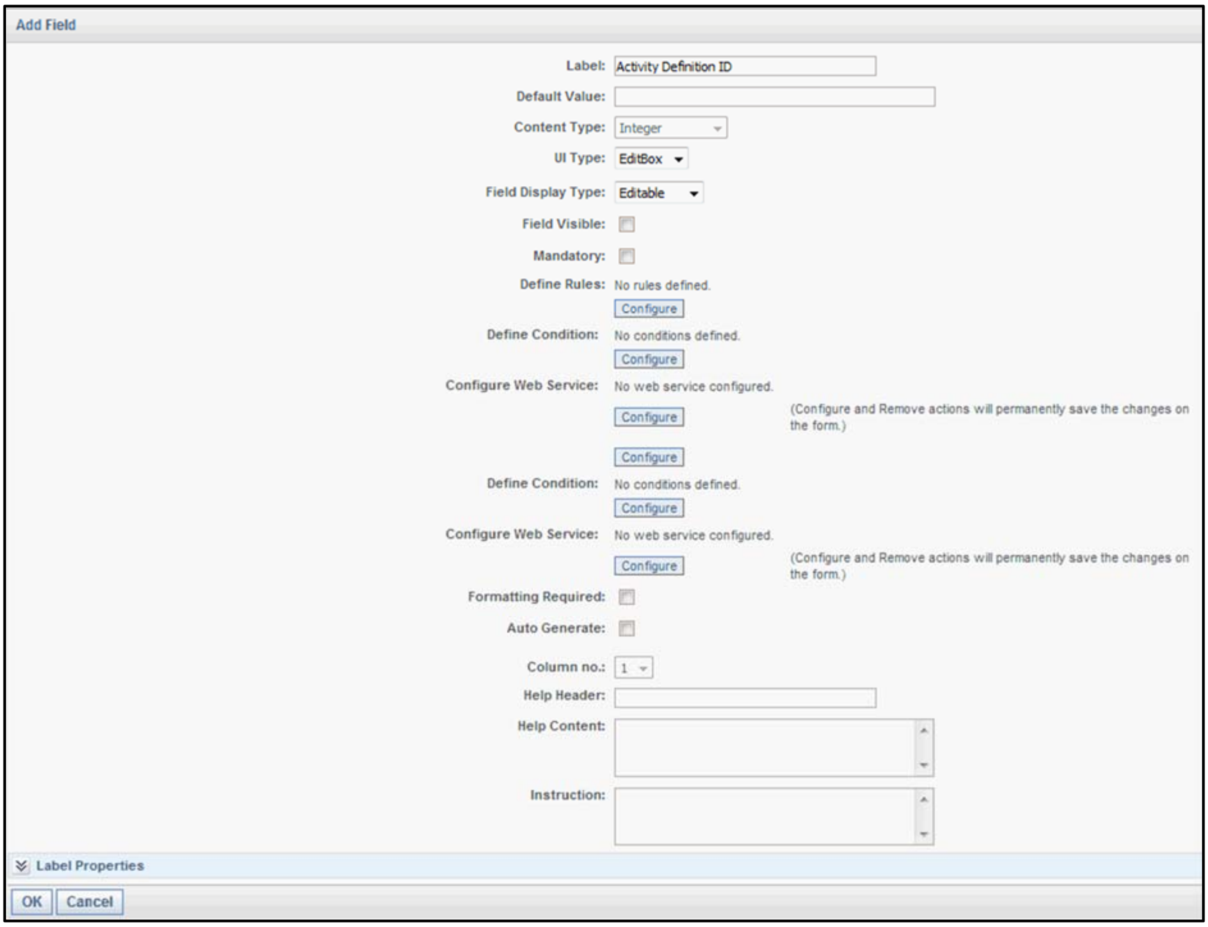


Figure No.12

6. **For any content type using Named Hierarchy (Figure 13):**
   A Named Hierarchy in the Schema Designer module contains a list of values that show up on a form in a drop down list or a multi select tree. Through UI Framework some of these values can be suppressed from showing up on the form for selection by the user. For e.g. 'All' or 'None' values can be suppressed. The user can select specific values to be displayed by separating them with commas.
   Note: Only the first level of values of the named hierarchy will be displayed and this feature is not supported for the Activity type named hierarchy on the activity details form for the Strategic Planner.

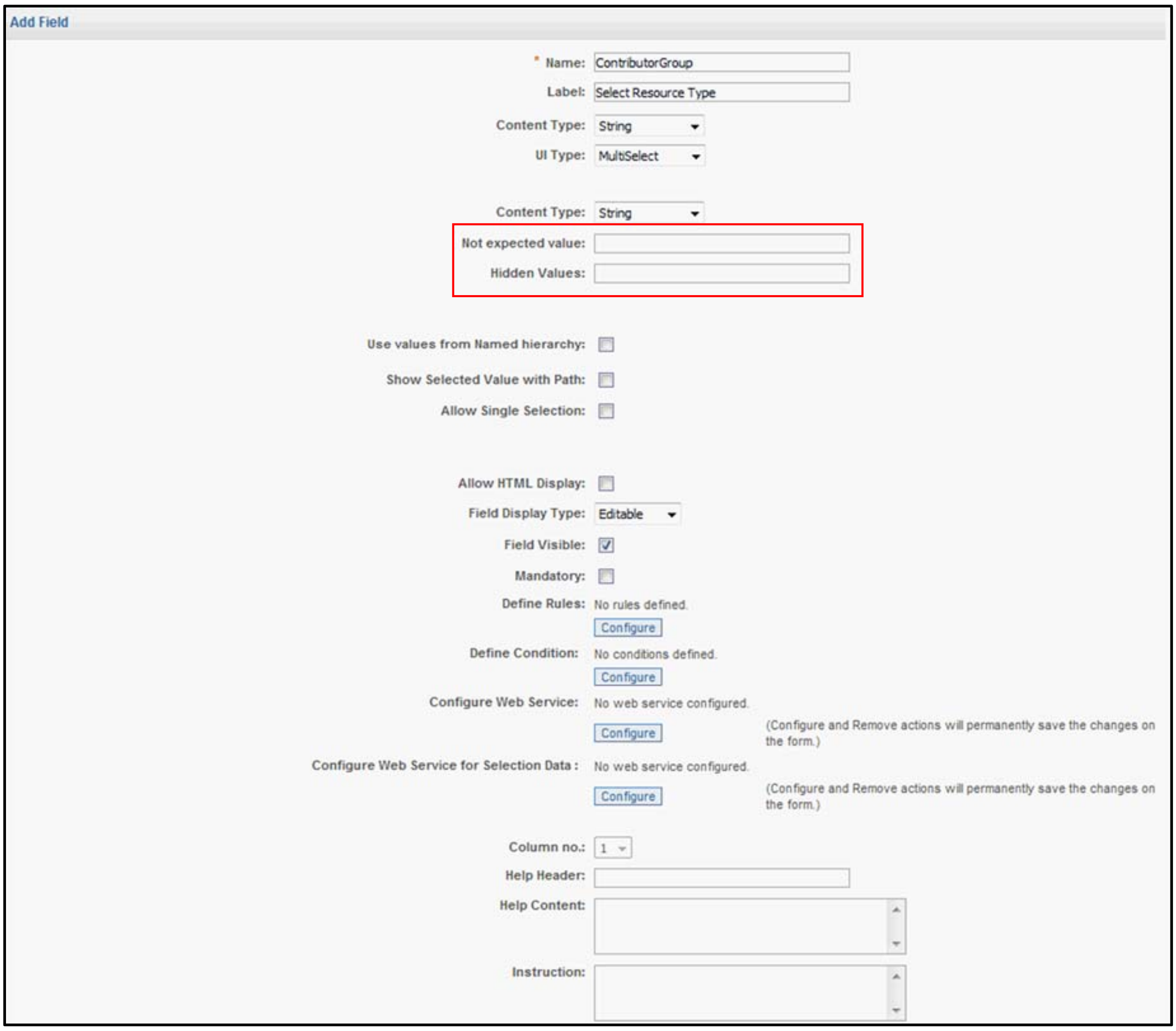


Figure No.13

Note: Rules and conditions can be defined for a field. For more information contact the Professional Services team.

5. Application

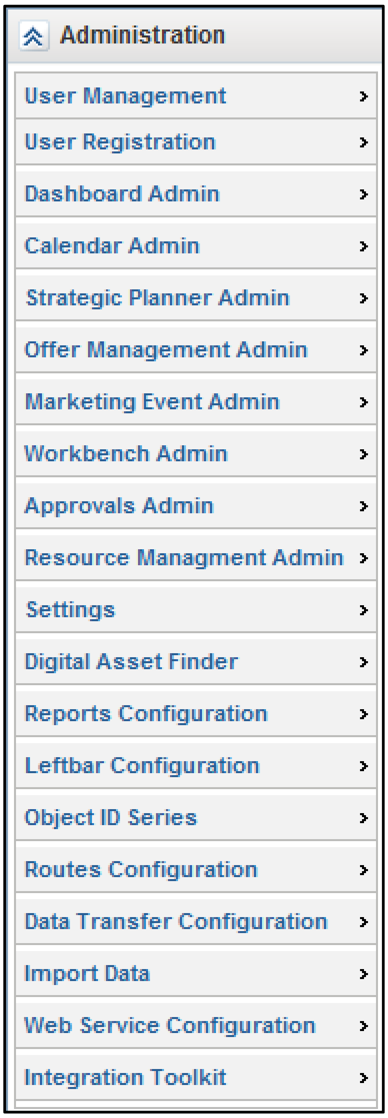
5.1. Overview

The Application utility allows the administrator to administer the various solutions in SAS Marketing Operations Management. The administrator can create and manage users and groups, register new users, configure the Dashboard and enter the settings for the various solutions.

5.2. Getting Started

On successful login the left pane of the screen displays the '**Administration**' menu**.** The user must have administrative rights to view this menu.

The following utilities are listed under this menu. Click on the name links to access any of these utilities.



5.3. User Management

5.3.1. Viewing existing Users/Groups

Click on the '**User Management**' link provided on the Dashboard screen on the left pane under '**Administration**'. The search facility may be used to search for a user by providing the keywords or listing the users in alphabetical order by selecting the first alphabet of the name. To view the list of users in a particular group click on the  icon and then select the group **(Figure 2).**

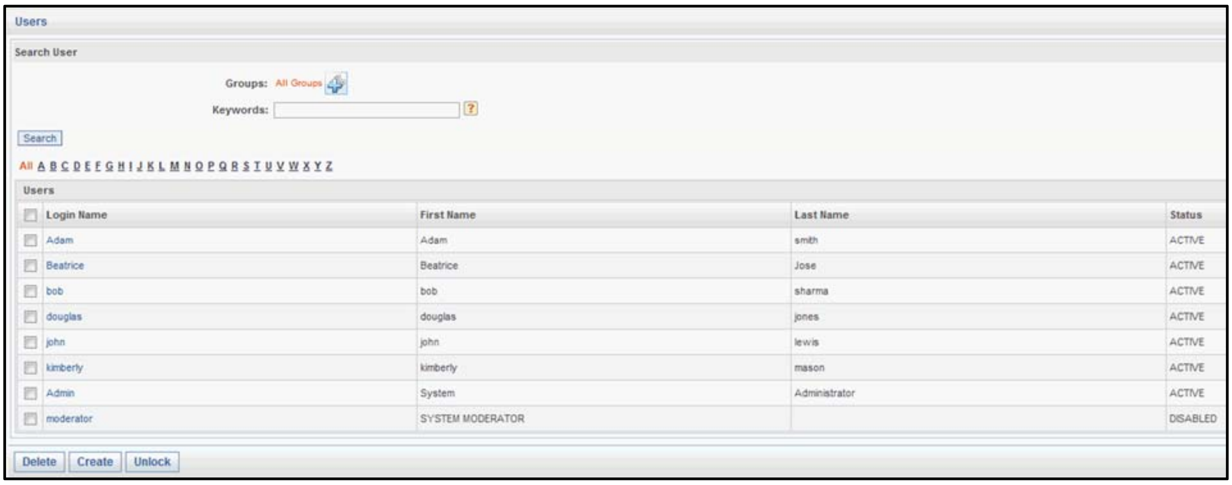


Figure No.1

5.3.2.Creating a User

Click on the '**Create**' button to create a new user **(Figure 1)**. Enter the user details such as the login name, first name and address etc. (The login name and the email address are mandatory fields). The user photograph can be uploaded by clicking on the '**Upload**' button (possible only if the 'Enable Profile Picture' setting is 'Yes'). The default solution page for the user may be selected from a drop down list. Click on the '**Add**' button **(Figure 2)** to add the user to a group(s).

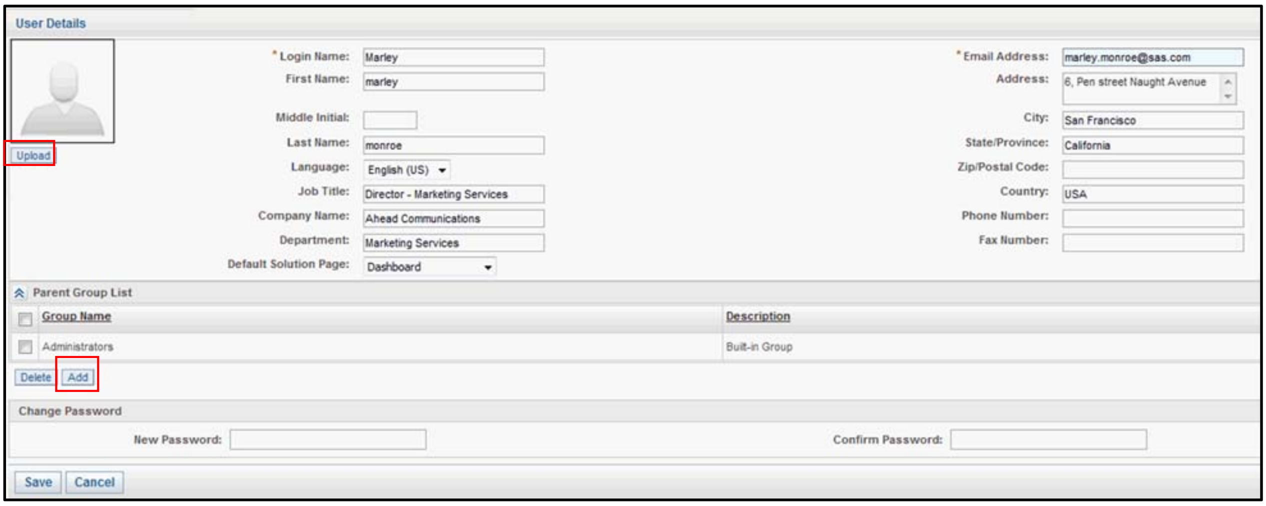


Figure No.2

To change the password enter the new password and confirm it.

Click on the '**Save**' button to save the user profile or to cancel the operation click on the '**Cancel**' button.

Note: The email should have a "@". The only validations are for a "@" and for one dot after the "@". The number of dots that follow the "@" are not checked.

5.3.3.Unlocking the User account

If a user tries to log in to SAS Marketing Operations Management and enters a wrong password for number of times specified in the client settings (default three times). The user account gets locked which means the user cannot log in to SAS Marketing Operations Management. The administrator has the right to unlock the account by selecting the user and clicking on the '**Unlock**' button **(Figure 2)**.

5.3.4. Editing the User Profile

Click on the first name link of the user on the user list screen **(Figure 2)**. A read-only '**User Details**' screen **(Figure 3)** is displayed, click on the '**Edit**' button to modify the necessary information and then click on the '**Save**' button.

5.3.5. Creating a Group

Click on the '**Groups**' link on the left pane under '**User Management**' to view the groups present in the system. A group details screen is displayed where the group hierarchy is displayed. Click on the '**Create**' button to create new groups. Enter the name (mandatory) and the description for the new group. The users can be added to the group by clicking on the '**Add**' button and selecting the users. The parent and the child groups can be specified for the current group by clicking on the '**Add**' button in each section. To add the new group click on the '**Save**' button **(Figure 3).**

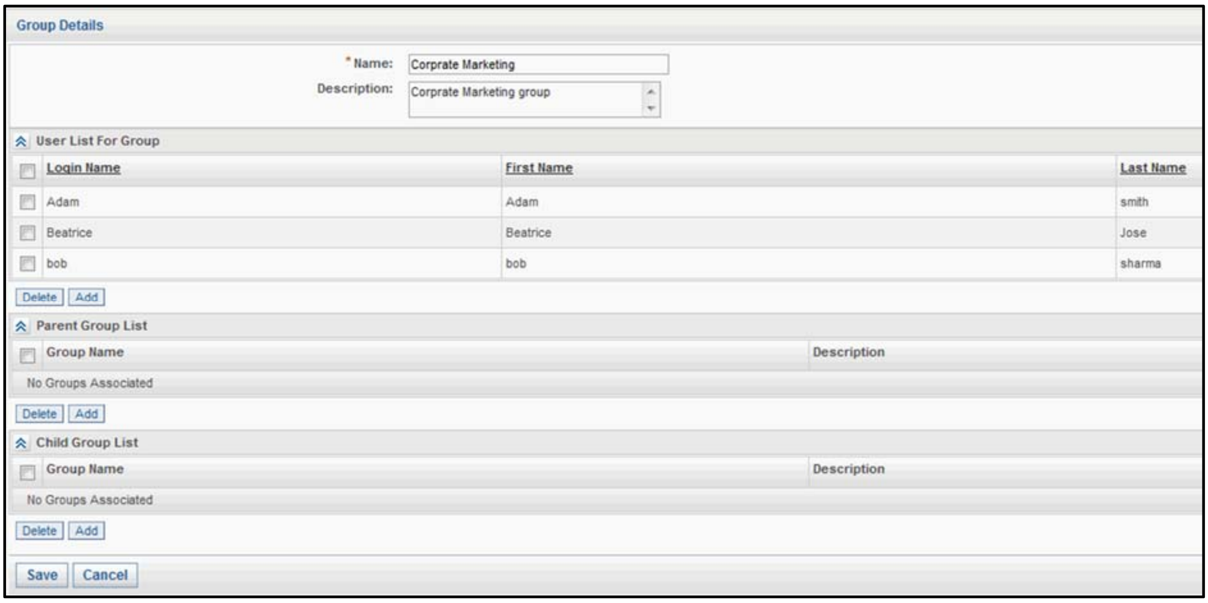


Figure No.3

5.4. User Registration

To register the new users click on the '**User Registration**' link provided on the Dashboard screen on the left pane under '**Administration**'. A list of users who have requested the administrator to register them in the system using the '**Register Now!**' facility on the login page, are displayed.

Figure No.4

Click on the first name link **(Figure 4)** to register a user. Validate or enter the relevant information on this screen and/or associated the user with a group.

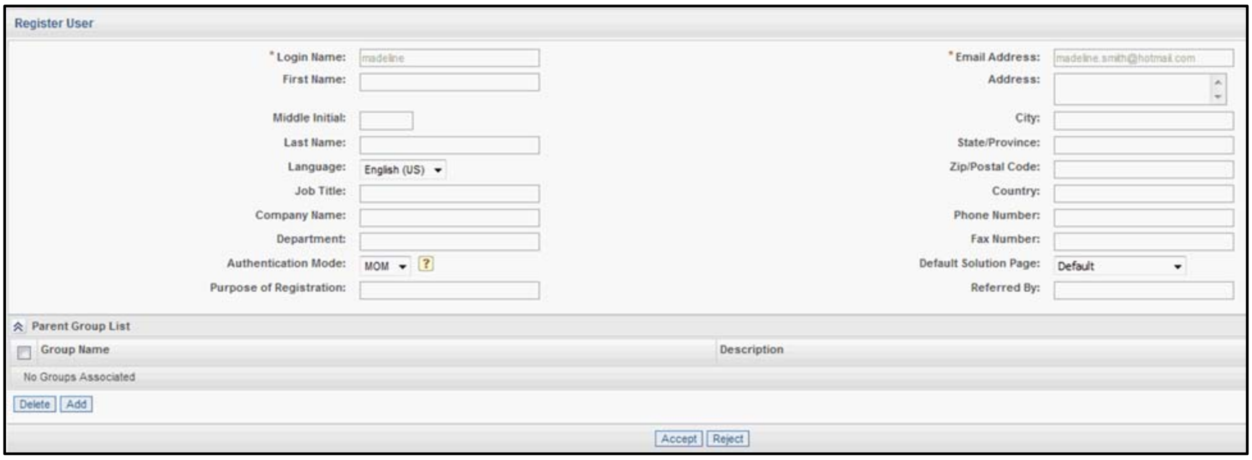


Figure No.5

Click on the '**Accept**' button to register the user or on the '**Reject**' button to reject the user request for registration **(Figure 6)**. If the user has been rejected the reason for rejection needs to be entered. A mail is sent to the prospective user informing the user of the registration or giving reasons for the rejection.

6. Dashboard Admin

6.1. Overview

Dashboard Admin enables implementation of Marketing Dashboards showing aggregated and summarized information on strategy, plans, budgets, workflow, digital content etc. The information is displayed on a dashboard which has one or multiple pages of information. Each page can have one or multiple channels of information. The administrator can configure pages and channels for the dashboard.

6.2. Getting Started

After signing in click on '**Dashboard Admin**' link provided on the Dashboard screen on the left pane under the '**Administration**' section to configure dashboards, pages and channels. On the left pane of the dashboard configuration screen there are links to administrative applications **(Figure 1)**. By default two dashboards are displayed.

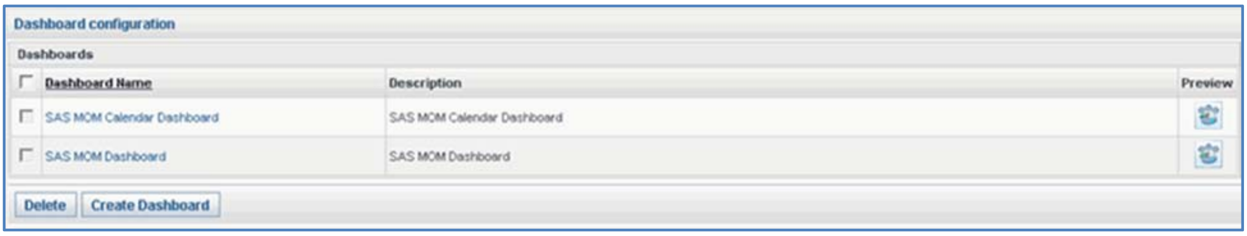


Figure No.1

Note: There is a certain method to configure the dashboard. First the dashboard layout is conceived by creation of pages for the dashboard. Then the content to be displayed on the pages need to be configured in the form of channels. Then the channels are added to the pages and the pages need to be added to the dashboard.

6.2.1. Configure Dashboard

The dashboard configuration screen is displayed by default with a list of dashboards present in the system **(Figure 1)**.

Each row in the list displays the name and description of the dashboard. The dashboard name has a link to edit the dashboard details and add pages to it. A selected dashboard can be deleted by clicking on the '**Delete**' button.

The dashboard can be previewed by clicking on  button.

Creating a Dashboard

Click on the '**Create Dashboard**' button on the dashboard list screen to create a new dashboard. Enter the following details:

- **Name** – The name of the dashboard
- **Description** – The description for the dashboard
- **Status** – Select whether to publish the dashboard

To save the dashboard, click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 2)**.

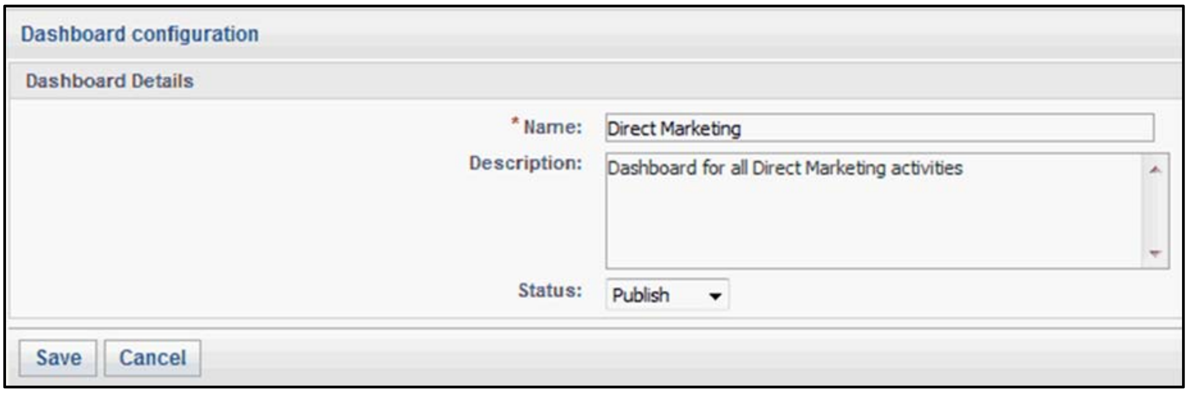


Figure No.2

Adding pages to a Dashboard

After saving the dashboard a dashboard details screen is displayed where the dashboard details can be edited and configured pages can be added to the dashboard **(Figure 3)**.

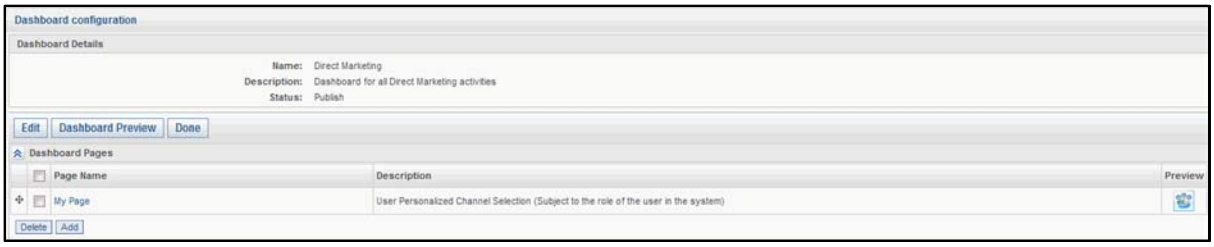


Figure No.3

The following operations can be performed:

- **Edit** – The dashboard details can be edited
- **Dashboard Preview** – The preview of the dashboard can be viewed
- **Done** – Changes are saved
- **Delete** – Deletes the selected pages
- **Add** – The pages to be displayed on the dashboard can be added

6.2.2. Configure Pages

To configure new pages click on the '**Configure Pages**' link on the left pane. A list of existing pages is displayed. Each row in the list displays the name and description of a page. Click on the page name link to edit the page details and add channels to it. A selected page can be deleted by clicking on the '**Delete**' button. Click on the  button to preview the page **(Figure 4)**.

Figure No.4

Creating a New Page

Click on the '**Create Page**' button on the page list screen to configure a new page. Enter the following details:

- **Name** – The name of the page
- **Description** – The description for the page
- **Status** – Select whether to publish the page, only if the page is published will it appear on the dashboard

To save the page click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 5)**.

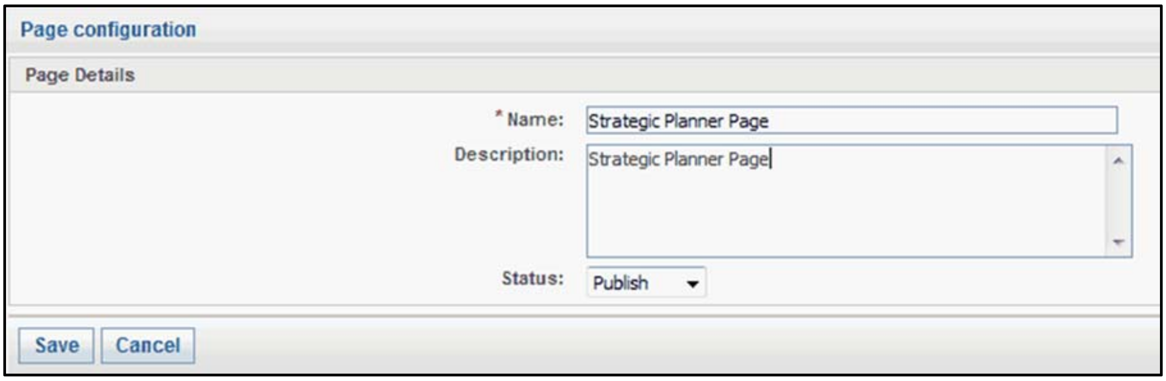


Figure No.5

Adding channels to a Page

After saving the new page, a page details screen is displayed where the page details can be edited and configured channels can be added **(Figure 6)**.

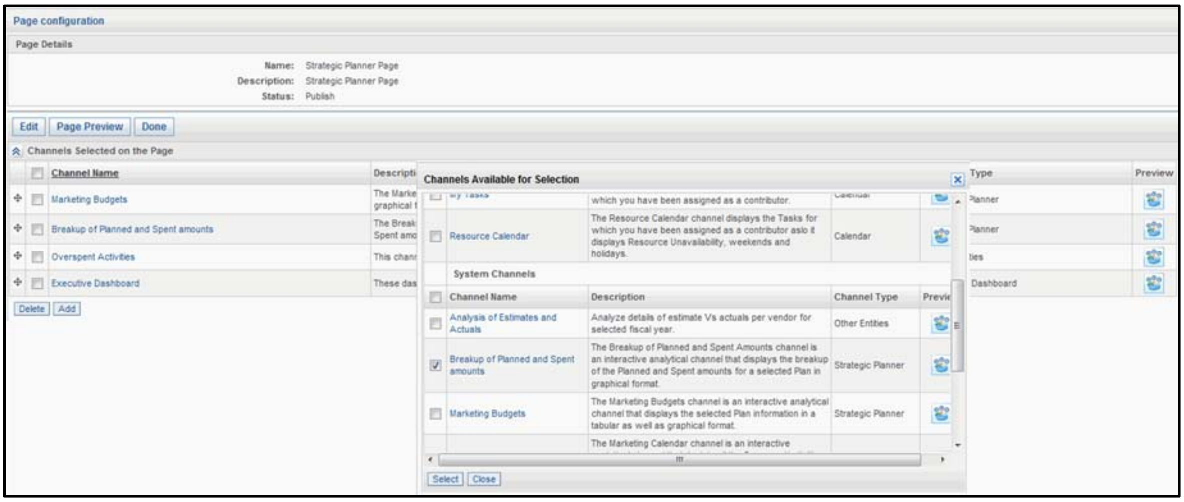


Figure No.6

The following operations can be performed on the Page Details screen:

- **Edit** – The page details can be edited.
- **Page Preview** – The page can be previewed.
- **Done** – Saves the changes.
- **Delete** – Deletes the selected channels.

- **Add** – The channels to be displayed on the page can be added.

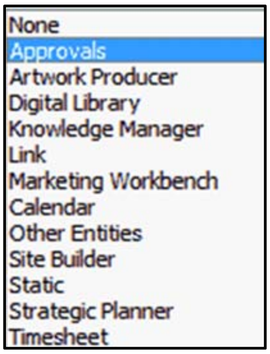
6.2.3. Configure Channels

To configure new channels click on the '**Configure Channels**' link on the left pane. A list of existing channels and system channels are displayed. Each row in the list displays the name, description and the channel type. Click on the channel name link to edit the channel details. A selected channel can be deleted by clicking on '**Delete**' button.

Click on the  button to preview the channel **(Figure 7)**.

Figure No.7

The following types of channels can be created:

	**Approvals** – Channel for Approval module can be created for example: a channel for the job initiator to view the jobs initiated from Approvals, channel for the Approvals reader to view the jobs etc.
	Artwork Producer – Channel for the Artwork Producer module can be created for example: Formats that are released can be displayed in a carousel or a list view etc.
	Digital Library – Channel for the Digital Library module can be created for example: Digital Assets stored in the Digital library can be displayed in a carousel or a list view etc.
	Knowledge Manager – A channel to display Knowledge Manager contents such as forums, topics and posts can be created.
	Link – A channel to display links to important resources and sites can be configured by the administrator.
	Marketing Workbench – Channel can be created to display links to the Marketing Workflow components.
	Calendar – Calendars for all modules can be displayed on the Dashboard via a calendar channel.
	Other Entities – Details of other entities can be displayed via channels.
	Site Builder – List of the sites configured in Site Builder can be displayed on channels.
	Static – Static content such as a static HTML or a Flash presentation can be displayed on channels.
	Strategic Planner – Channels can be created to display contents from the Strategic Planner module.
	Timesheet – Channels can be created to displays contents from the Timesheet module.

To create a new channel click on the '**Create Channel**' button on the channel list screen **(Figure 7)**.

Setting up channel – Digital Library

Enter the following details:

- **Name** – The channel name.
- **Description** – The description of the channel.
- **Type** – Select the type of channel from the following list
- **Default** – Select whether the channel should be shown by default to all users.
- **Removable** – Select whether the channel can be removed from the end-user's dashboard.
- **Allowed Caching** – Select whether caching is allowed for this channel.
- **Cache Expiration Interval** – For each user the channel contents, which is displayed, is cached for a certain time period. The value specified here allows the dashboard services to clear the cache and

regenerate new contents for the channel. The refresh interval can be selected from a drop down list box, which has a time period ranging from 5 minutes to one month.

- **Group** – The channel can be grouped based on their contents. The administrator can specify the group for the channel.
- **Display State** - Default appearance of the channel i.e. whether the channel should be displayed in a maximized or minimized state when published.
- **Status** – Select whether to publish the channel. If the channel is not published it will not be visible to the end-users.
- **Personalize** – The administrator can set up filters for the content to be shown in the channel. The fields to be displayed in the channel can be specified. The end user can overwrite these filters and can specify which columns are to be displayed by personalizing the channel content. If the personalize option is set to 'No' the user is not allowed to personalize the channel.
- **Target Entity** – Depending on the channel type, entities related to the type will be displayed. For example: The channel type is 'Approvals' then the target entity will be 'WORKFLOWPROCESS'
- **Additional Details** – This section is displayed only in the list view. In this section whether to show all the assets matching the filter criteria or to show restricted number of rows by selecting the appropriate option can be specified. The administrator can also specify the application to launch.
- **Criteria Builder** – The criteria for displaying assets with information can be built using the following:
    - Target Entity
    - Related Entity
    - Related Facets
- **Define Filters** - In this tab the filters can be specified. See **section 6.2.3.2.1** for more details.
- **Define Display Columns** - In this tab columns to be displayed in the channel can be specified. Columns See **section 6.2.3.2.2** for more details.
- **Define Personalization Filters** - To facilitate additional filter criteria, this can be set by the administrator. The administrator can select and specify the fields, which the end users can personalize. For other views/channels more personalization fields can be added by clicking on the 'Add Field' button.

Note: For displaying expired assets an additional filter needs to be added for fetching the assets.

Save the Channel definition **(Figure 8)**.

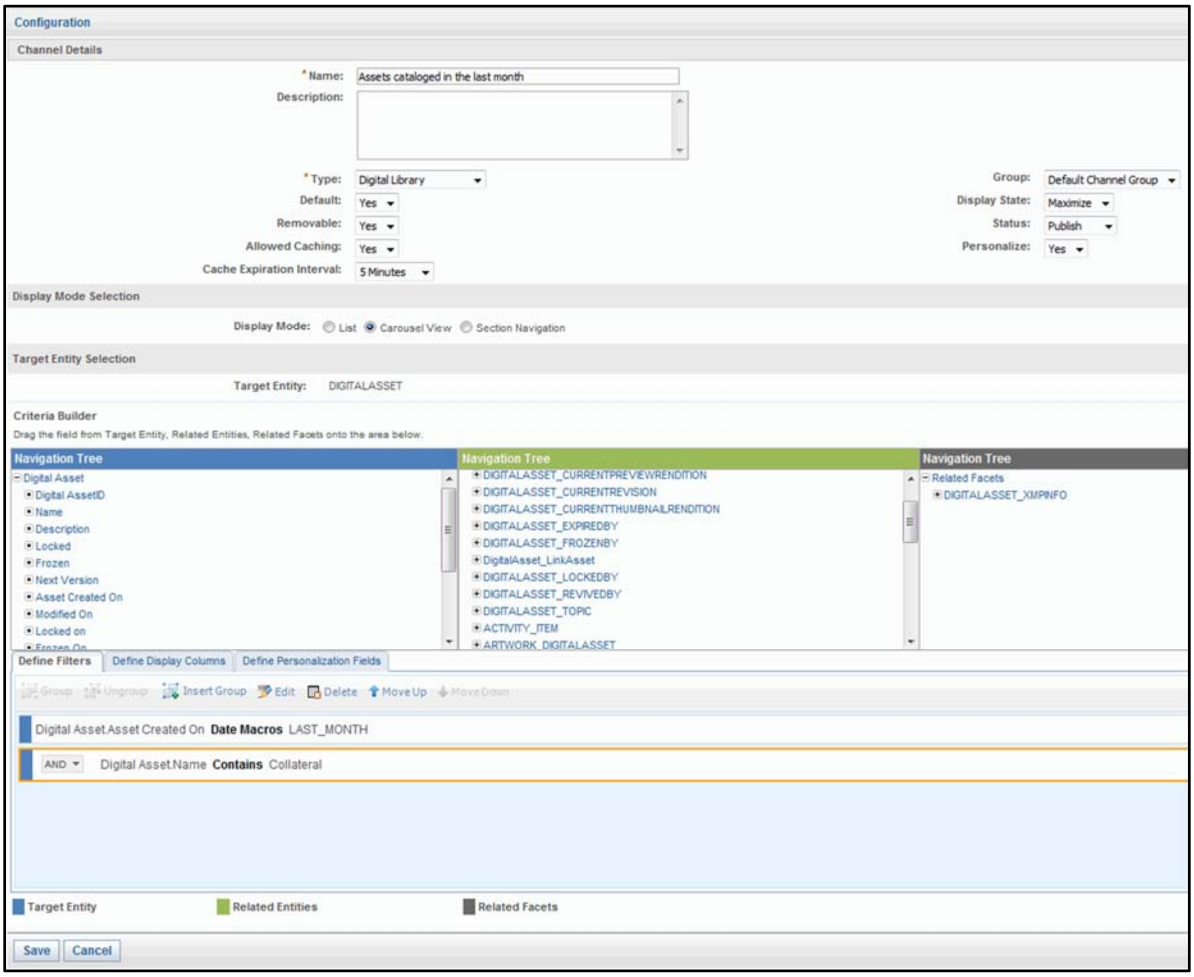


Figure No.8

Setting up filters

In the define filters tab the filters can be defined by selecting any field from entity fields, related entity fields and related facet fields. Drag the fields into the filters tab below as filter criteria for displaying assets. Conjunctions between filter criteria such as 'AND' or 'OR' conditions can be set between filters.

Note: For the section navigation mode the default filter selected is "SECTION_DIGITALASSET.Section Path **Equal to** None".

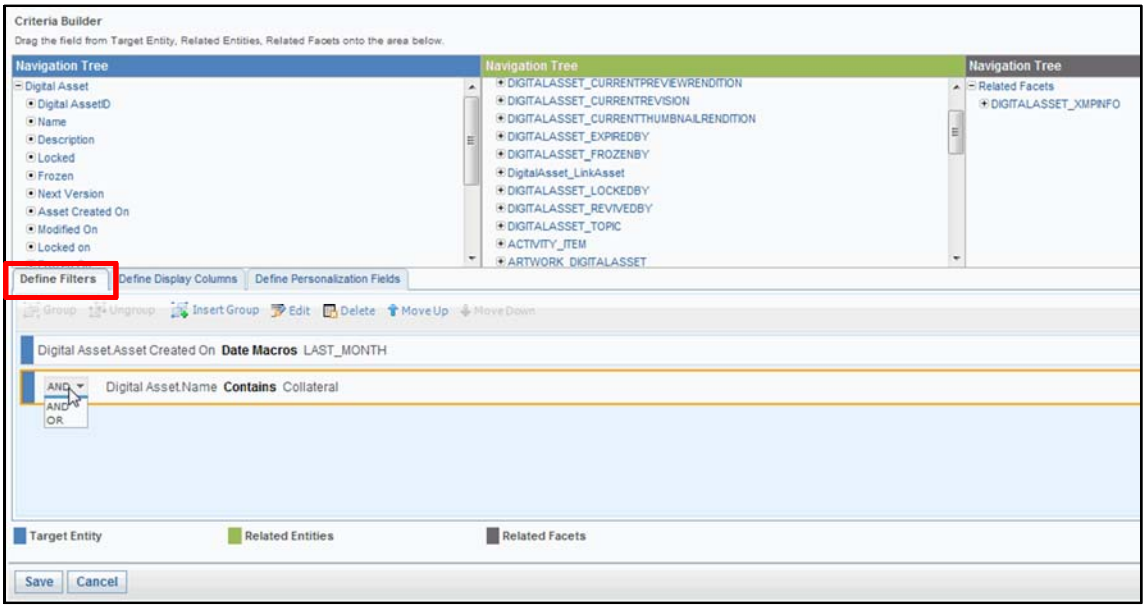


Figure No.9

When the fields are dragged into the filter tab a select filter popup is displayed where the following can be specified:

- **Filter name**: Select the filter name from the list on the left section of the pop-up.
- **Operator**: Select the operator from the drop down box.
- **Filter Value**: Enter the filter value.

Click on the '**Add**' button to add the filter **(Figure 10).**

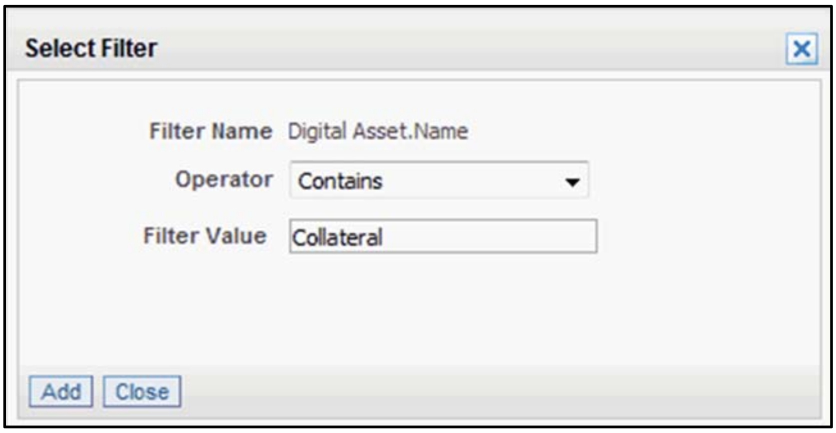


Figure No.10

The following actions can be performed in the define filters tab:

- **Group**: To group the defined filters, select the filters by holding the 'Ctrl' button and click on the '**Group**' button.

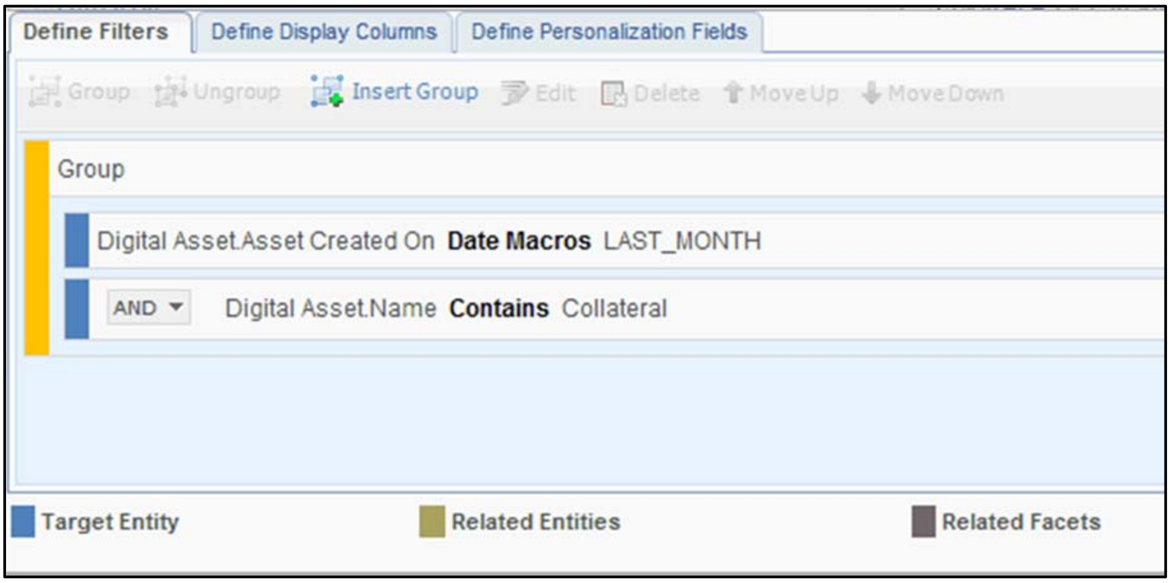


Figure No.11

- **Ungroup**: Select the group and click on the '**Ungroup**' button to ungroup the filter criterion **(Figure 11)**.
- **Insert Group**: Click on the '**Insert Group**' button to insert a group and then add the filters to it.
- **Edit**: Select the filter criteria and click on the '**Edit**' button to make changes in the criteria.
- **Delete**: Select the criteria to delete it.
- **Move Up**: Select the criteria and click on the '**Move Up**' to position it above the other criterion.
- **Move Down**: Select the criteria and click on the 'Move Down' to position it below the other criterion.

Setting up columns to be displayed in a channel

In the define columns tab the columns can be defined by selecting any field from entity fields, related entity fields and related facet fields. Drag the fields into the columns tab below. In the define display columns tab the columns are displayed with the column name, column title, cell type. Each column has the options to be shown as a tool tip when the user does a mouse over or to show in the information bar or both can be selected.

Note: For the Carousel and Section Navigation View, by default the name and created on are selected.

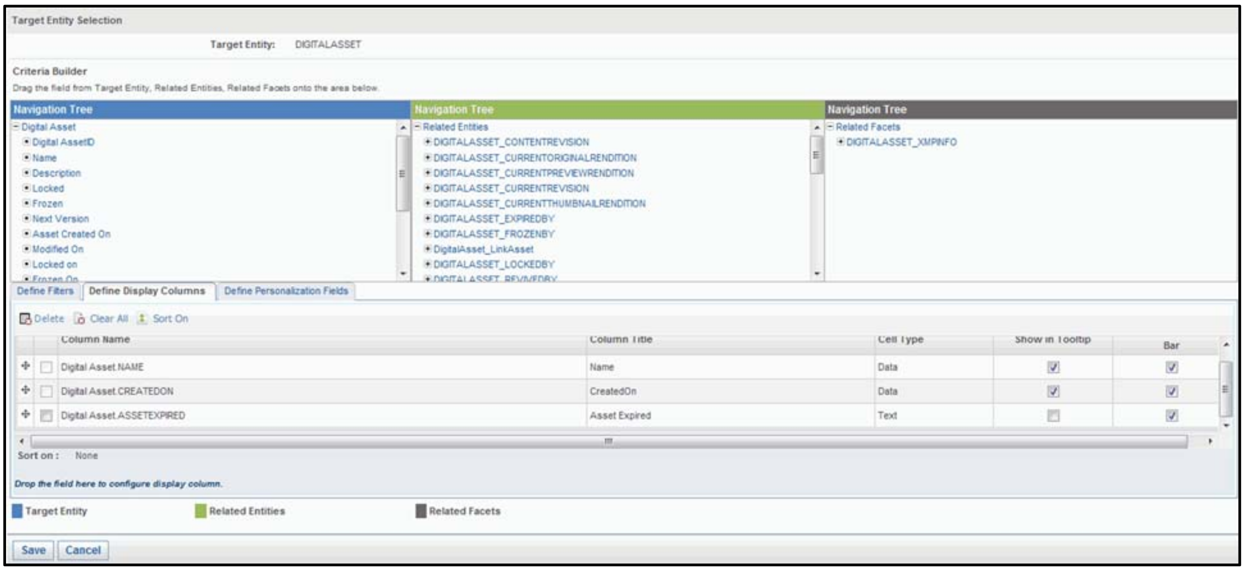


Figure No.12

When the fields are dragged into the column tab a select column popup is displayed where the following can be specified:

- **Display text**: The display text for the column name on the Channel.
- **Cell type**: Specify what is to be shown in the Column, whether it is text or image.
- **Handler URL**: The link to the page, which will handle the request when the user clicks on it.

Click on the '**Add**' button to add the filter **(Figure 13).**

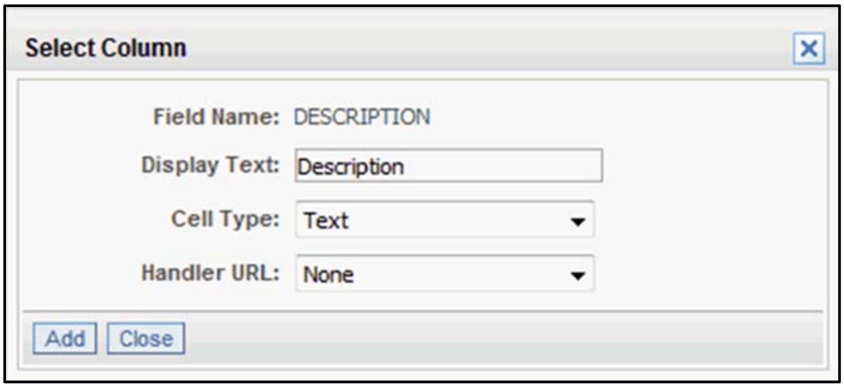


Figure No.13

The following actions can be performed in the define columns tab **(Figure 14)**:

- **Delete**: Select the column and click on the '**Delete**' button for deletion of the column.
- **Clear All**: Deletes all the specified columns.
- **Sort On**: The assets can be sorted by clicking on the '**Sort on**' button; the sorting can be done on any of the column fields and can be in ascending or descending order.

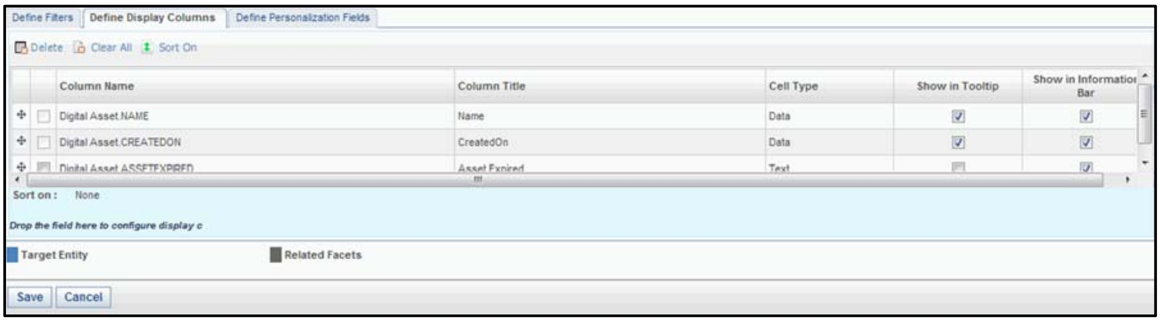


Figure No.14

Setting up Personalization fields for a channel

In the define personalization fields tab, the fields can be defined by selecting any entity fields, related entity fields and related facet fields. Drag the fields into the define personalization fields tab below. These are the fields that the end user can personalize on.

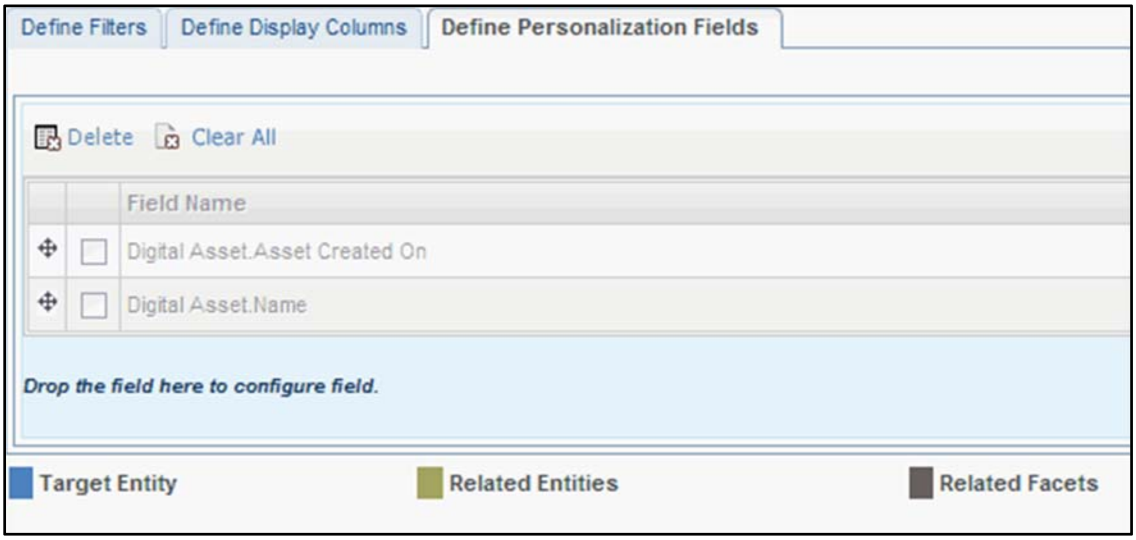


Figure No.15

Setting up channel – Approvals

Same as the 'Digital Library' Channel, the Target Entity is selected by default as 'WORKFLOWPROCESS'.

Setting up channel – Artwork Producer

The Formats generated in Artwork Producer can be seen on the Dashboard without having to go to the Artwork Producer module. Same as the 'Digital Library' channel, but the default Target Entity is 'FORMAT' and the display mode can be selected as 'List' or 'Carousel' view.

Setting up channel - Knowledge Manager

Same as the 'Digital Library' channel, the Target Entity selected should be either Topic or Forum and the section where the display mode is selected is not available. The filters from 'TOPIC' or 'FORUM' are to be selected.

Setting up a Links channel

Select the channel type as '**Link**'. In the additional details section the Column layout can be selected as one or two **(Figure 16)**.

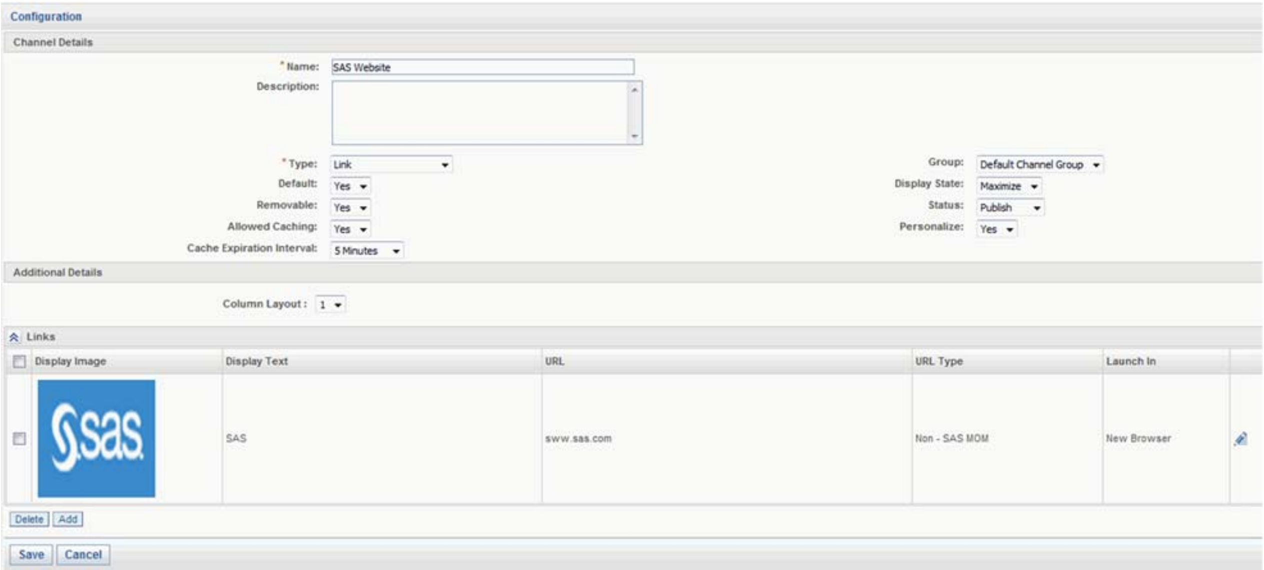


Figure No.16

In the Links section to delete an existing link select it and then click on the '**Delete**' button and multiple links can be added by clicking on the '**Add**' button. A web link channel popup is displayed where the following details need to be entered:

- **URL**: Enter a link to the website or virtual path for a document.
- **Display Text**: This text to be displayed against the Image uploaded for the link.
- **Description**: The description for the link.
- **URL Type**: Select SAS MOM or Non-SAS MOM as the type of the URL. For SAS MOM, use predefined named URL. For Non-SAS MOM give the complete path e.g. http://www.google.com.
- **Launch In**: Select whether the link is to be launched in the same browser or in a new browser.
- **Group by**: URLs can be grouped depending on the type specified in the drop down box.
- **Image File**: An image file for the given URL can be uploaded **(Figure 17).**

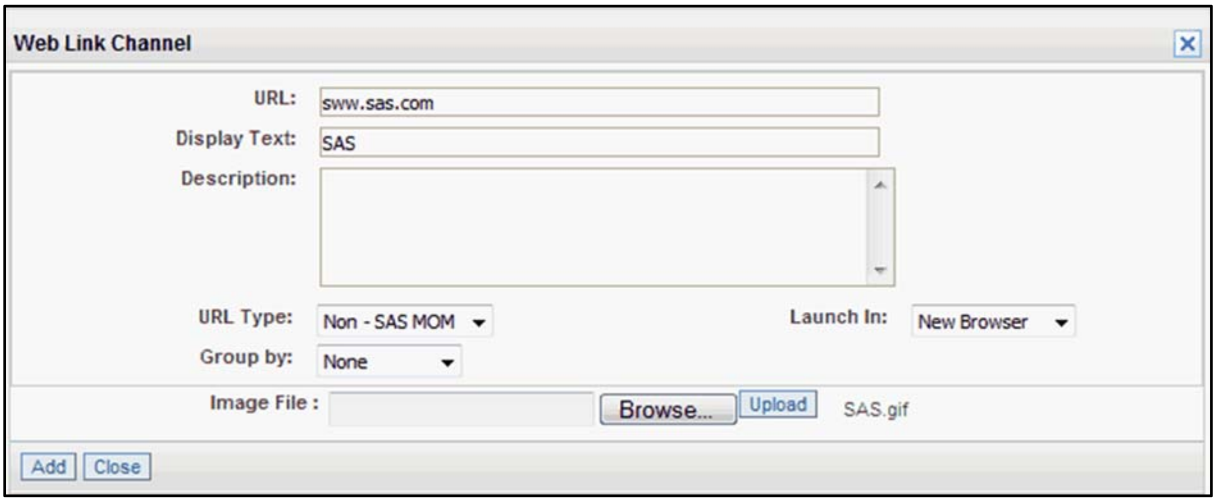


Figure No.17

Setting up channel - Other Entities

Besides the major entities described above there are other entities provided by the SAS Marketing Operations Management solution. This is a generalized channel type; using this any information from the other entities in the system can be shown on the dashboard channel. Select the channel type as '**Other Entities**' to create the channel. In the target entity selection section select the target entity from a drop down list **(Figure 20)**. The complete configuration of this type of channel is the same as the 'Digital Asset' channel type. The only difference is that in case of 'Digital Library' channel type the target entity is "DIGITALASSET" or "SECTION"; in this case the selection of target entity can be anything from the drop down box.

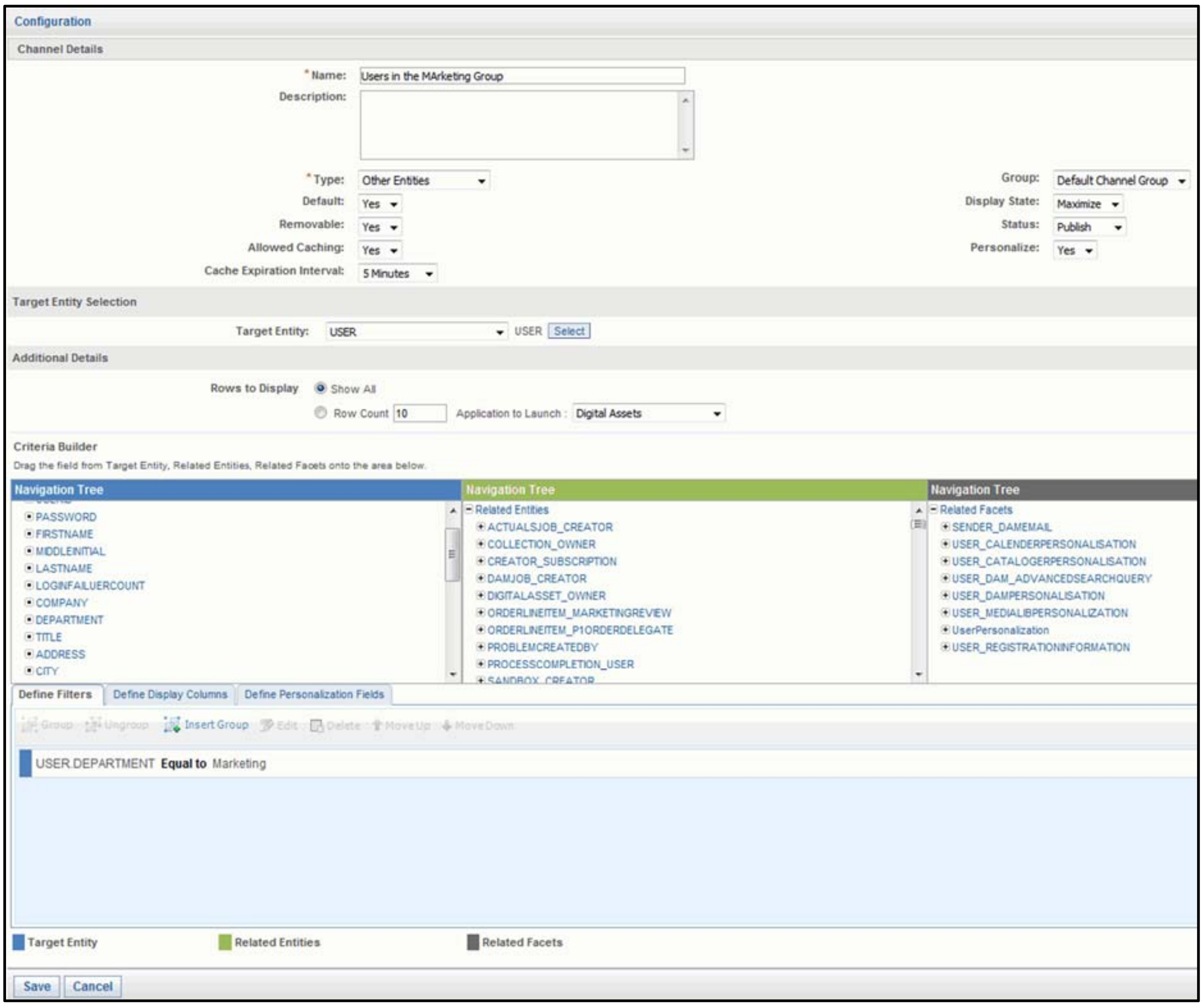


Figure No.18

Setting up channel - Strategic Planner

Follow the same steps as the 'Digital Library' Channel, but specify the target entity as 'PLAN', 'MARKETINGACTIVITY', 'COMMITMENT' or 'INVOICE'.

The Strategic Planner channels showing information regarding plans, campaigns or activities need to be configured separately for each type of user role such as authors, readers for a plan or marketing owner, activity coordinators, budget managers, readers for a campaign or activity. The appropriate role needs to be selected while configuring the channels based on roles under the define filters list.

Setting up channel - Site Builder

Follow the same steps as the 'Digital Assets' channel. The target entity is "SITE".

Setting up a Static channel

Select the channel type as '**Static**' and select the file type to be uploaded. The following types of files can be uploaded:

- **Html Document**: An Html file with the additional files which are part of the Html page can be uploaded and the height can be specified in pixels. The Html file must satisfy some constraints:

- Html generated must contain only one body tag.
- If images and CSS files are part of the HTML page then their path must contain only the file name. (Html Page files and images must be created in the same folder).
- There should be no JavaScript function calls in body tab attributes.

- **Flash file**: Upload a flash file to be displayed on the channel.
- **Richtext**: Enter the text message to be displayed in the channel. Click on the link 'Click here for the message details', a 'Static Text Message' popup is launched. Type in the text Message (formatting such as bold, Italic, color, height etc. can be done). Copying and pasting of HTML is not allowed in this text area.
- **Other Document**: Other documents such as text, word, excel, pdf etc. can be uploaded.
- **Xml and Xsl**: In this type two files must be uploaded:
    - Xml file – This contains data to be displayed.
    - Xsl file – This defines logic for data presentation.

Save the Channel definition **(Figure 21)**.

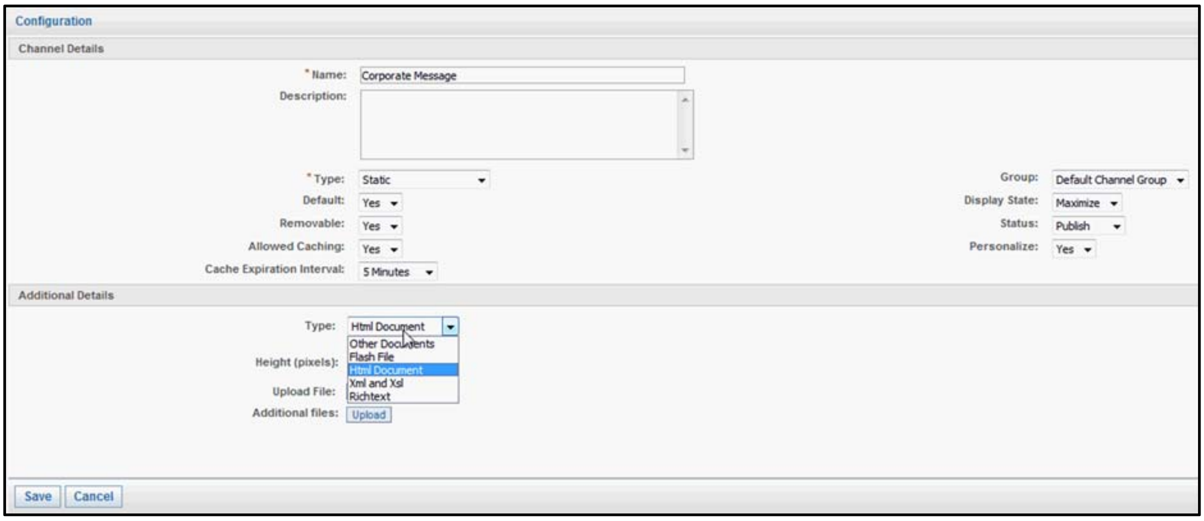


Figure No.19

Setting up channel – Marketing Workbench

Follow the same steps as the 'Digital Library' channel and select the target entity as 'ACTIVITY', 'WORKFLOWPROCESS' or 'BRIEF'.

6.2.4. Predefined Channel Setup

SAS Marketing Operations Management provides predefined analytical channels for the following:

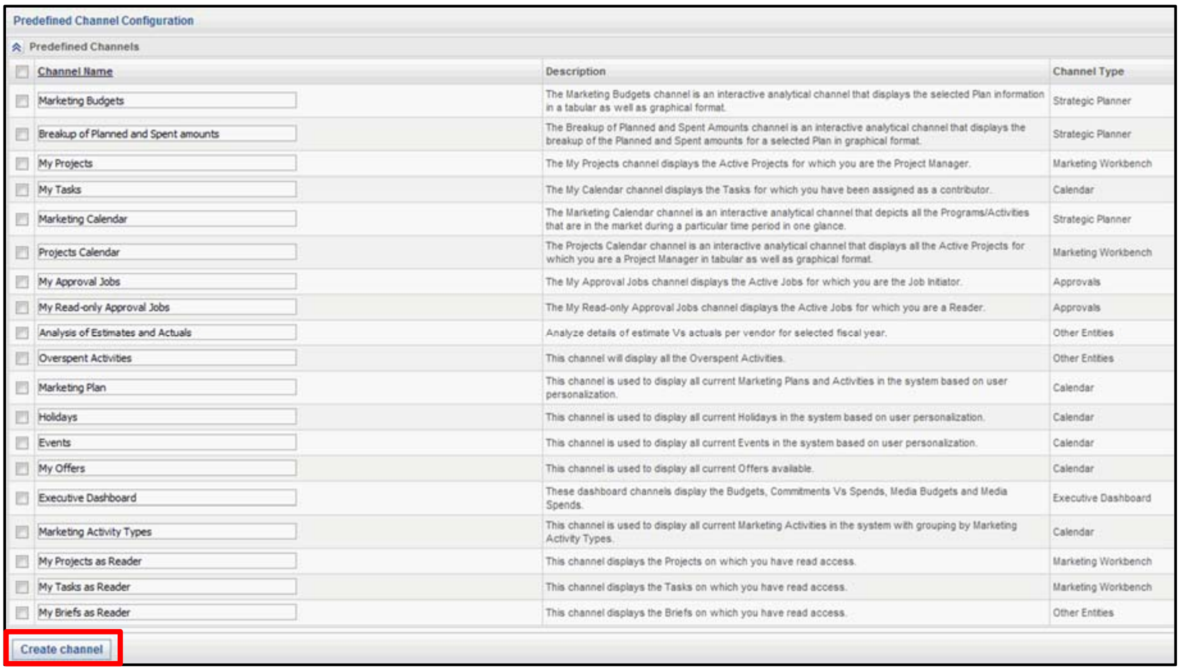
1. **Strategic Planner**: The analytical Channels for Strategic Planner include comprehensive information about Marketing Plans, Budgets, Commitments, Activities and Assets with the ability to drill down into details. The following channels can be created for Strategic Planner:
    - **Marketing Budgets**
    - **Breakup of Planned and Spent amounts**
    - **Marketing Calendar**

- **Executive Dashboard –** All the users in the Executive User group have access to these dashboards; they do not need to be individually assigned to the access group for each of the Plans for a particular Line of Business.

2. **Marketing Workbench:** The channels for Marketing Workbench include details for all the Projects that are currently 'Active' for the user who is a Project Manager or for the user who has a 'Read' or 'Author' access to the Project. The following channels can be created for Marketing Workbench:
   - **My Projects**
   - **Projects Calendar**
   - **My Projects as Reader**
   - **My Tasks as Reader**
3. **Approvals**: The following channels could be configured for Approvals:
   - **My Approval Jobs**: Channel for the Job initiator to see the initiated jobs
   - **My Read-only Approval Jobs**: Channel for the Approvals Reader to see the read-only jobs
4. **Other Entities**: The following channels could be configured for other entities:
   - **Analysis of Estimates and Actuals**: A predefined channel for viewing the Vendor Estimates vs. Actuals
   - **Overspent Activities**: A predefined channel for Overspent Activities
   - **My Briefs as Reader**: Channel to view the briefs on which the logged in user has read access
5. **Marketing Calendars**: Multiple instances of a Calendar using different filters e.g. Multiple Activities Calendars can be set up in the system, one for each type of Activity such as Advertising and Email. The following channels could be configured for the marketing calendars dashboard:
   - **My Tasks**: This channel displays all the workbench tasks/approval jobs for which the logged in user has been assigned as a contributor.
   - **Marketing Plan**: The Marketing Calendar channel is an interactive analytical channel that depicts all the Programs/Activities that are in the market during a particular time period in one glance.
   - **Holidays**: A predefined channel to display all current holidays in the system based on user personalization such as the country selected.
   - **Events**: A predefined channel to display all current events in the system based on user personalization. All the users of the system can view the events but only the creator can edit this channel.
   - **My Offers**: A predefined channel to display all current offers available. The users who are part of the offer can view this.
   - **Marketing Activity Types**: This channel is used to display all current Marketing Activities in the system grouped by Marketing Activity Types.

The analytical channels can be created using the predefined channel setup utility which displays the list of predefined channels in the system. The user can select the channels to be created.
These channels have been provided with some predefined filters and can be setup from the Predefined channel configuration in a few quick steps. Additional filters and columns can be added to the configuration if required.

This utility also assists the administrator to create multiple instances of a predefined channel.



Predefined Channel Configuration

Predefined Channels

Channel Name	Description	Channel Type
Marketing Budgets	The Marketing Budgets channel is an interactive analytical channel that displays the selected Plan information in a tabular as well as graphical format.	Strategic Planner
Breakup of Planned and Spent amounts	The Breakup of Planned and Spent Amounts channel is an interactive analytical channel that displays the breakup of the Planned and Spent amounts for a selected Plan in graphical format.	Strategic Planner
My Projects	The My Projects channel displays the Active Projects for which you are the Project Manager.	Marketing Workbench
My Tasks	The My Calendar channel displays the Tasks for which you have been assigned as a contributor.	Calendar
Marketing Calendar	The Marketing Calendar channel is an interactive analytical channel that depicts all the Programs/Activities that are in the market during a particular time period in one glance.	Strategic Planner
Projects Calendar	The Projects Calendar channel is an interactive analytical channel that displays all the Active Projects for which you are a Project Manager in tabular as well as graphical format.	Marketing Workbench
My Approval Jobs	The My Approval Jobs channel displays the Active Jobs for which you are the Job Initiator.	Approvals
My Read-only Approval Jobs	The My Read-only Approval Jobs channel displays the Active Jobs for which you are a Reader.	Approvals
Analysis of Estimates and Actuals	Analyze details of estimate Vs actuals per vendor for selected fiscal year.	Other Entities
Overspent Activities	This channel will display all the Overspent Activities.	Other Entities
Marketing Plan	This channel is used to display all current Marketing Plans and Activities in the system based on user personalization.	Calendar
Holidays	This channel is used to display all current Holidays in the system based on user personalization.	Calendar
Events	This channel is used to display all current Events in the system based on user personalization.	Calendar
My Offers	This channel is used to display all current Offers available.	Calendar
Executive Dashboard	These dashboard channels display the Budgets, Commitments Vs Spends, Media Budgets and Media Spends.	Executive Dashboard
Marketing Activity Types	This channel is used to display all current Marketing Activities in the system with grouping by Marketing Activity Types.	Calendar
My Projects as Reader	This channel displays the Projects on which you have read access.	Marketing Workbench
My Tasks as Reader	This channel displays the Tasks on which you have read access.	Marketing Workbench
My Briefs as Reader	This channel displays the Briefs on which you have read access.	Other Entities

Create channel

Figure No.20

The following steps need to be followed to create a predefined channel:

1. Click on the '**Predefine Channel Setup**' link on the left pane of the Dashboard admin screen.
2. A list of predefined channels is displayed. Select the appropriate channel and enter the name. Click on the '**Create Channel**' button **(Figure 20)**.
3. A predefined channels screen is displayed with the channel name, channel type and the creation status **(Figure 21)**. The channel is created.

Predefined Channel Configuration

Predefined Channels

Channel Name	Channel Type	Creation Status
Marketing Budgets	Strategic Planner	Completed

Process completed successfully.

Figure No.21

The channel definition can be modified in a restricted manner i.e. the user cannot delete the mandatory filter or the display columns but can add a new set of filters or display columns. To modify the channel definitions follow the steps below:

1. Once the channel is created click on the '**Configure Channels**' link on the left pane. A list of channels is displayed where the predefined channel will be displayed under the '**System Channels**'.
2. Click on the channel name.
3. A channel details screen is displayed. Click on the '**Edit**' button to modify the channel details.

7. Calendar Admin

This utility allows the admin user to configure calendars in the system for any entity. The calendars are based on a start and end date for the selected entity. This utility is similar to the Dashboard admin utility.

7.1. Getting Started

After signing in click on the '**Calendar Admin**' link provided on the Dashboard screen on the left pane under the '**Administration**' section to configure the calendars. On the left pane of the calendar configuration screen there are links to configure calendars **(Figure 1)**. A list of configured calendars is displayed.

Figure No.1

7.1.1. Configure Calendar

Click on the '**Create Calendar**' button **(Figure 1)** to create a new calendar for an entity. A calendar details screen **(Figure 2)** is displayed where the following details can be entered:

- **Name** – The calendar name
- **Description** – The description of the calendar
- **Allowed Caching** – Select whether caching is allowed for this calendar
- **Cache Expiration Interval** – For each user the calendar contents, which is displayed, is cached for a certain time period. The value specified here allows the dashboard services to clear the cache and regenerate new contents for the calendar. The refresh interval can be selected from a drop down list box, which has a time period ranging from 5 minutes to one month.
- **Calendar Group** – The calendar can be grouped based on their contents. The administrator can specify the group for the calendar.
- **Calendar Status** – Select whether to publish the calendar. If the calendar is not published it will not be visible to the end-users.
- **Personalize** – The administrator can set up filters for the content to be shown in the calendar. The fields to be displayed in the calendar can be specified. The end user can overwrite these filters and can specify which columns are to be displayed by personalizing the channel content. If the personalize option is set to 'No' the user is not allowed to personalize the calendar.

- **Target Entity Selection** - To set up the calendar specify the target entity on which the calendar is based on.
- **Criteria Builder** – The criteria for the calendar can be built using the following:
    - Target Entity
    - Related Entity
    - Related Facets
- **Define Dates** – Specify the start and the end dates by dragging and dropping.
- **Define Filters** - The filters can be specified. See section 6.2.3.2.1 for more details.
- **Define Display Columns** - Columns to be displayed in the channel can be specified. See section 6.2.3.2.2 for more details.
- **Define Personalization Filters** – Personalization filters can be set to facilitate additional filter criteria, which can be set by the administrator. The administrator can select and specify the fields, which the end users can personalize.

  For Section Navigation view: By default the section path is selected and no more personalization fields should be selected.

Save the Channel definition **(Figure 2)**.

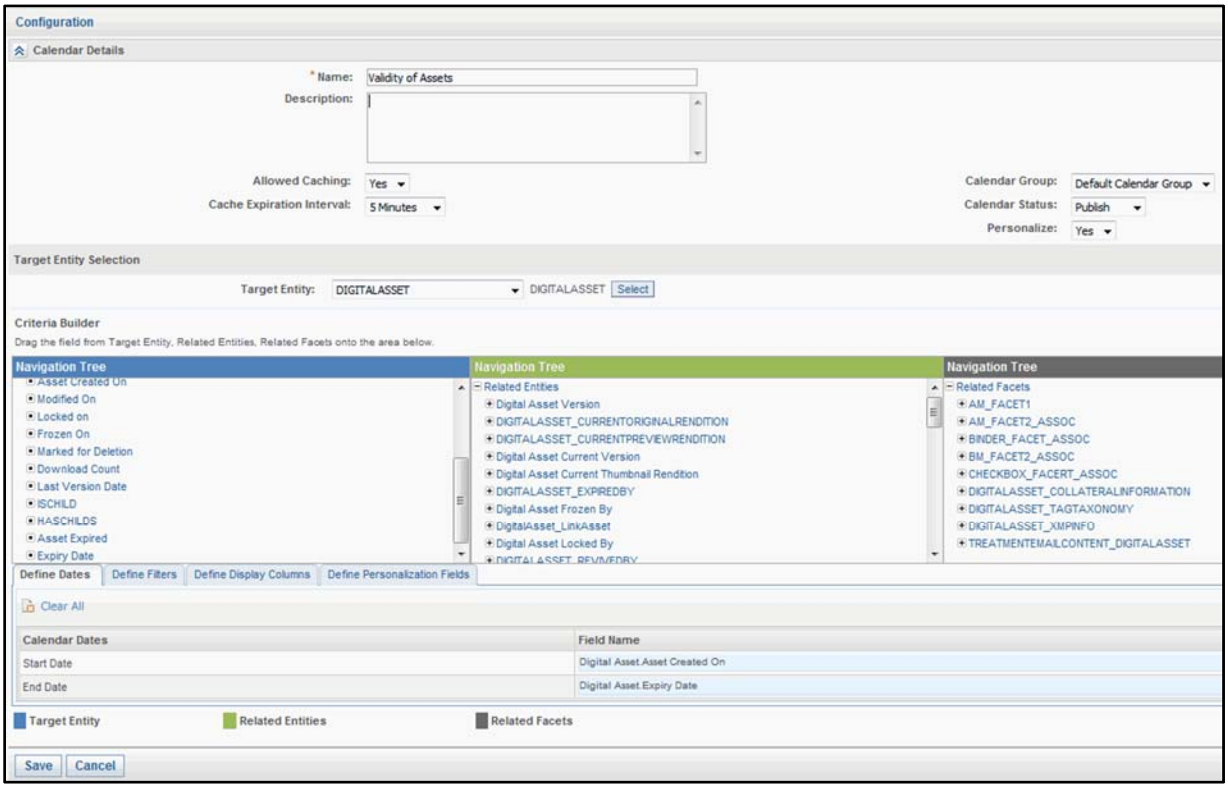


Figure No.2

Setting up filters

In the define filters tab the filters can be defined by selecting any field from entity fields, related entity fields and related facet fields. Drag the fields into the filters tab below as filter criteria for displaying assets. Conjunctions between filter criteria such as 'AND' or 'OR' conditions can be set between filters.

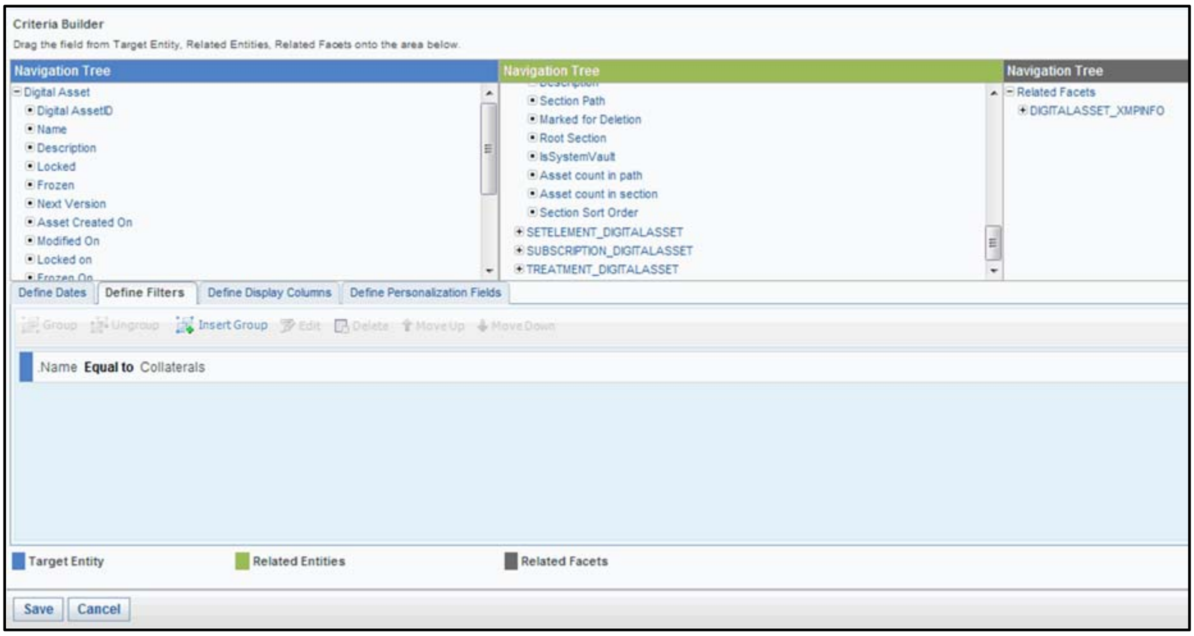


Figure No.3

When the fields are dragged into the filter tab a select filter popup is displayed where the following can be specified:

- **Filter name**: Select the filter name from the list on the left section of the pop-up.
- **Operator**: Select the operator from the drop down box.
- **Filter Value**: Enter the filter value.

Click on the '**Add**' button to add the filter **(Figure 4).**

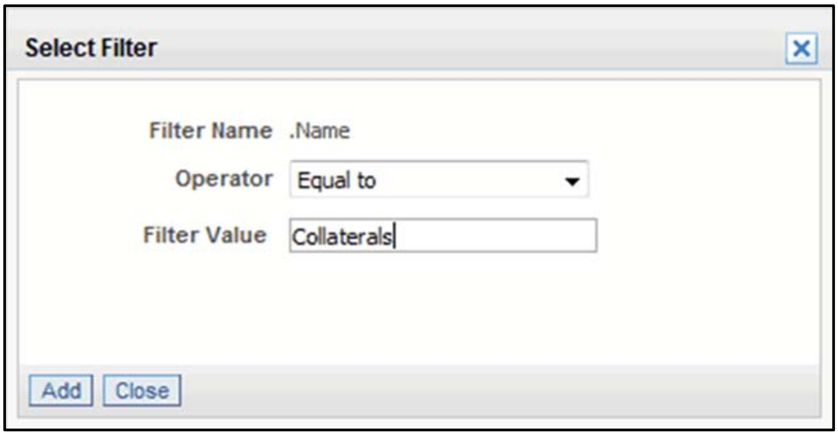


Figure No.4

The following actions can be performed in the define filters tab:

- **Group**: To group the defined filters, select the filters by holding the 'Alt' button and click on the '**Group**' button.

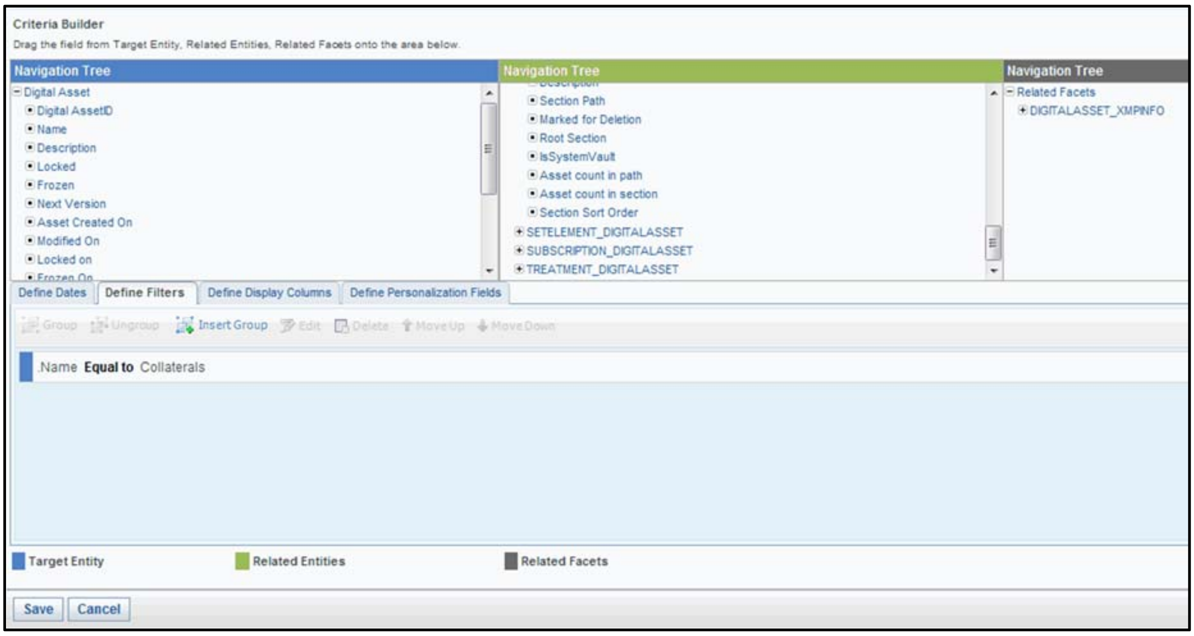


Figure No.5

- **Ungroup**: Select the group and click on the '**Ungroup**' button to ungroup the filter criterion **(Figure 5)**.
- **Insert Group**: Click on the '**Insert Group**' button to insert a group and then add the filters to it.
- **Edit**: Select the filter criteria and click on the '**Edit**' button to make changes in the criteria.
- **Delete**: Select the criteria to delete it.
- **Move Up**: Select the criteria and click on the '**Move Up**' to position it above the other criterion.
- **Move Down**: Select the criteria and click on the 'Move Down' to position it below the other criterion.

Setting up Columns to be displayed on the Calendar

In the define columns tab the columns can be defined by selecting any field from entity fields, related entity fields and related facet fields. Drag the fields into the columns tab below. In the define display columns tab the columns are displayed with the field name, field data type and specify the display separator.

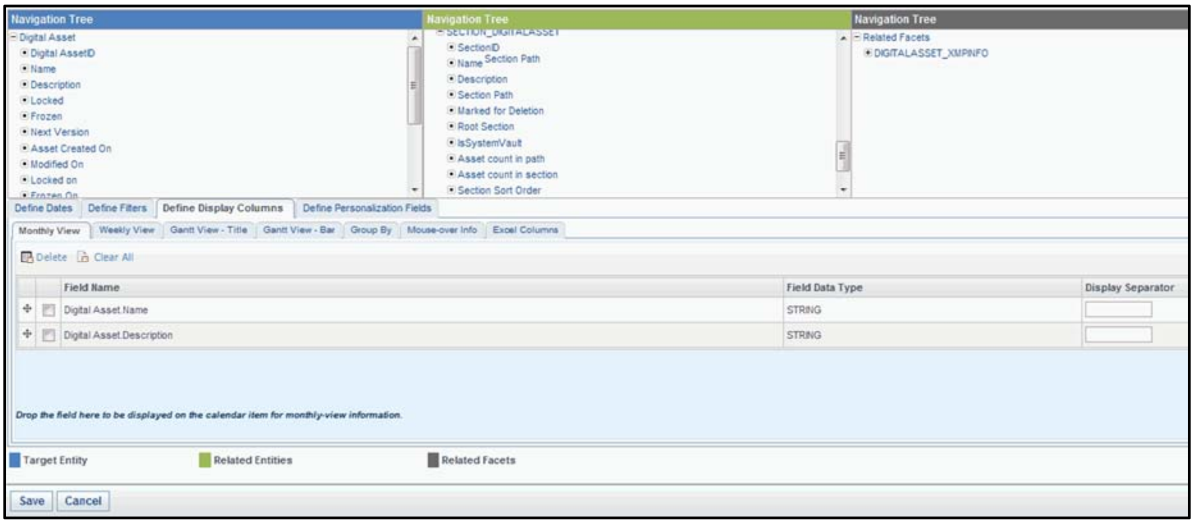


Figure No.6

The following actions can be performed in the define columns tab **(Figure 6)**:

- **Delete**: Select the column and click on the '**Delete**' button for deletion of the column.
- **Clear All**: Deletes all the specified columns.

Setting up Personalization fields for a Calendar

In the define personalization fields tab, two more tabs are present:

- **Default Personalization Fields**: By default the following fields are available for Personalization on any calendar that is created:
    - o **Show Holidays** – The end user can decide whether the holidays need to be displayed on the calendar.
    - o **Display Mode** – The end user can decide the display mode of the start and end of an activity.
    - o **Show all items for a day** - The end user can decide whether all the items or selected for a day need to be displayed on the calendar.
- **Custom Personalization Fields**: Personalization fields can be defined by selecting any entity fields, related entity fields and related facet fields. Drag the fields into the define personalization fields tab below. These are the fields that the end user can personalize on in addition to the above fields.

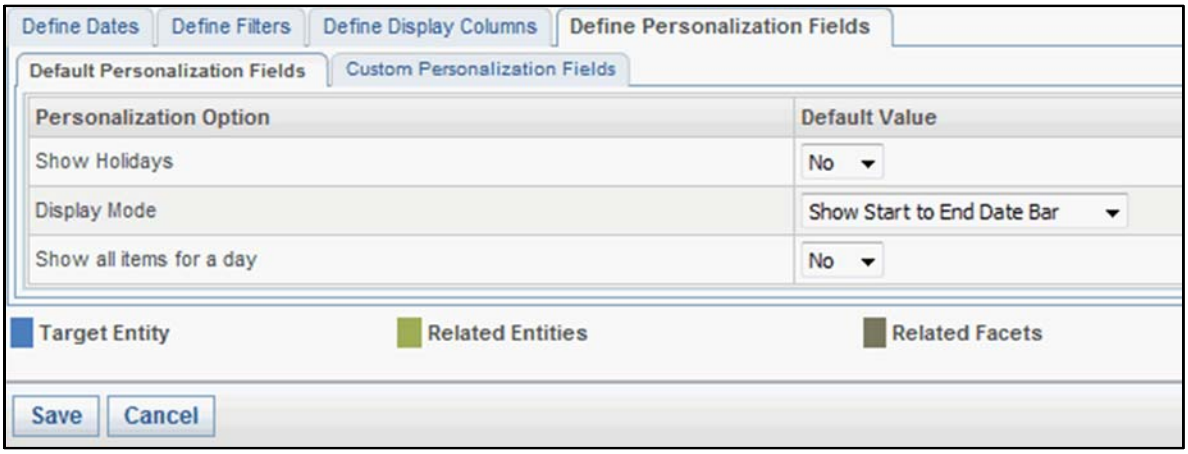


Figure No.7

7.1.2. Predefined Calendars

To create predefined calendars click on the '**Predefined Calendar**' link on the left pane. A list of predefined calendars is displayed. Select the calendar and enter the name and click on the '**Create Calendar**' button. These calendars have been provided with some predefined filters. This utility also assists the administrator to create multiple instances of a predefined calendar.

Predefined Calendar Configurations

Calendar Name	Description
My Tasks	The My Calendar channel displays the Tasks for which you have been assigned as a contributor.
Marketing Plan	This channel is used to display all current Marketing Plans and Activities in the system based on user personalization.
Holidays	This channel is used to display all current Holidays in the system based on user personalization.
Events	This channel is used to display all current Events in the system based on user personalization.
My Offers	This channel is used to display all current Offers available.
Marketing Activity Types	This channel is used to display all current Marketing Activities in the system with grouping by Marketing Activity Types.

Create Calendar

Figure No.8

8. Strategic Planner

8.1. Planner Administration

After signing in click on the '**Strategic Planner Admin**' link on the dashboard screen on the left pane under '**Administration**'. The planner setting is displayed by default.

On the left pane there is a section '**Administration**' which has links to administrative applications, which are as follows **(Figure 1)**:

Note: If the 'Best Practice Builder' setting is set to 'Yes' then the last link can be viewed.

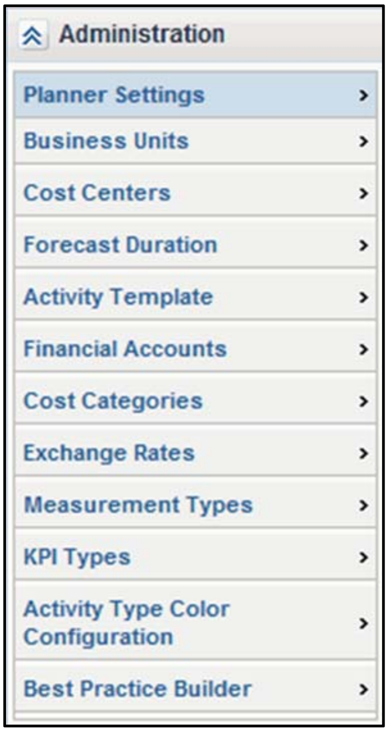


Figure No.1

8.1.1. Planner Settings

To view the planner settings click on the '**Planner Settings**' link on the left pane **(Figure 1)**. A Planner Settings read-only screen is displayed. To edit the details click on the '**Edit**' button at the bottom of the screen. Each section of this screen is explained individually as follows:

Plan Bulk Updates

Figure No.2

Plan Bulk Updates:		
Settings	**Expected Values**	**Explanation**
Budget and Forecast Reallocation required	True / False	To enable budget and forecast reallocation for a plan in the Sandbox, set the value to true. The default is true.
Add new Forecast Attribute at Plan level	True / False	If the budget and forecast reallocation is enabled, then in forecast reallocation new forecast attributes can be added at the Plan level in the sandbox. To enable this, set the value to true. The default is true.
Aligning Multiyear Marketing Activity required	True / False	To enable multiyear marketing activities for a Plan through the Sandbox set the value to true. The default is true.

Forecast Configuration

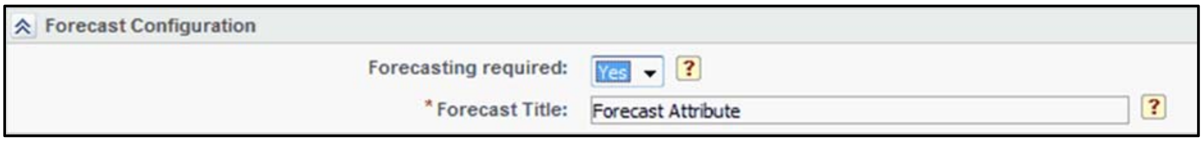


Figure No.3

Forecast Configuration:		
Settings	**Expected Values**	**Explanation**
Forecasting required	Yes/No	Whether forecasting is required or not
Forecast Title		Name of the attribute used for forecasting.

Fiscal Configuration

Figure No.4

Fiscal Configuration:		
Settings	**Expected Values**	**Explanation**
Fiscal Year required	Yes/No	A plan can be per fiscal year or can be a rolling plan. This setting indicates if fiscal year is required.
Fiscal Month	Appropriate Month Name	This setting will set the start month of the fiscal year.

Business Unit Specific Configuration

Figure No.5

Business Unit Specific Configuration:		
Settings	**Expected Values**	**Explanation**
Business Unit Specific Cost Centers required	Yes/No	This setting is applied if the cost centers are to be configured per business unit
Business Unit Specific Cost Category required	Yes/No	This setting is applied if the cost categories are to be configured per business unit
Business Unit Specific Vendors required	Yes/No	This setting is applied if the vendors are to be configured per business unit
Business Unit Universe propagation required	Yes/No	This setting determines whether the users and groups selected for the Business Unit Universe need to be propagated to lower level Business Units. If this is set to true, Business Unit Universe users and groups will be propagated to lower level Business Units at the time of creation. The users and groups can also be propagated while editing the Business Unit Universe after creation.

Budget Configuration

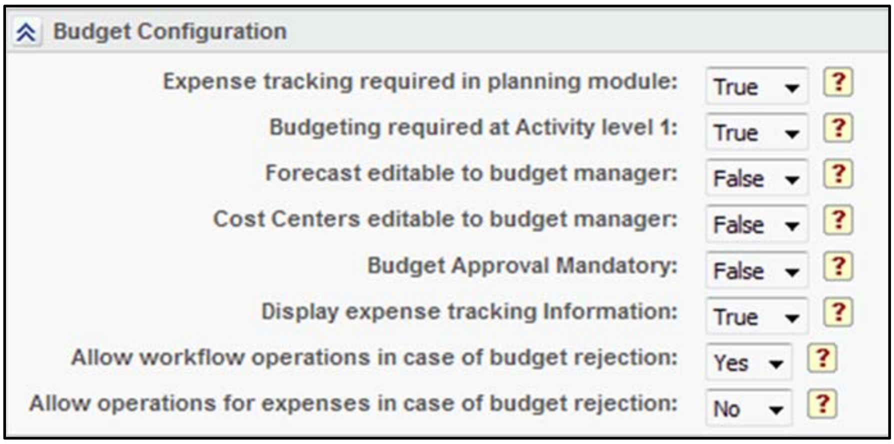


Figure No.6

Budget Configuration:		
Settings	**Expected Values**	**Explanation**
Expense tracking required in planning module	True / False	This will indicate if expense tracking can be done from the planning module or not. By default, expenses can be tracked from the budget manager view. An expense tracking means commitments and invoices.
Budgeting required at Activity level 1	True / False	This will indicate whether budgeting is required at activity level 1 (typically a program level)
Forecast editable to budget manager	True / False	This setting indicates if the budget manager can edit forecasts from the budget manager screens
Cost Centers editable to budget manager	True / False	This setting indicates if the budget manager can edit cost centers from the budget manager screens
Budget Approval Mandatory	True / False	If this is set to true, then only activities with approved budgets will be displayed in the list of budgets. If this is set to false, then all in progress activities will be displayed in the budget list of budget manager
Display expense tracking Information	True / False	This setting will indicate if the budgeting info i.e. commitments and invoices should be displayed in planner. If the value for this is false, then commitments and spends sections are not displayed in planner
Budget Manager selection type	Single select/Multi select	The selection of the budget manager on the activity screens can be either a multiple select or a single select. The default is multi select
Allow workflow operations in case of budget rejection	Yes/No	These settings will allow/disallow the workflow operations in case of budget rejection. The default value is yes
Allow operations for expenses in case of budget rejection	Yes/No	These settings will allow/disallow the expense operations in case of budget rejection. The default value is no

Release Money Configuration

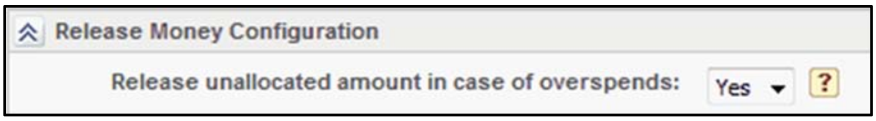


Figure No.7

Release Money Configuration:		
Settings	**Expected Values**	**Explanation**
Release unallocated amount in case of	Yes/No	This configuration setting allows the user to specify whether the unallocated amount should be released, in case of

overspends		overspend in the marketing activity. If the default value is yes, then the user is shown a confirmation message before the unallocated amount is released. If the setting is no, then the unallocated amount cannot be released.

Activity Configuration

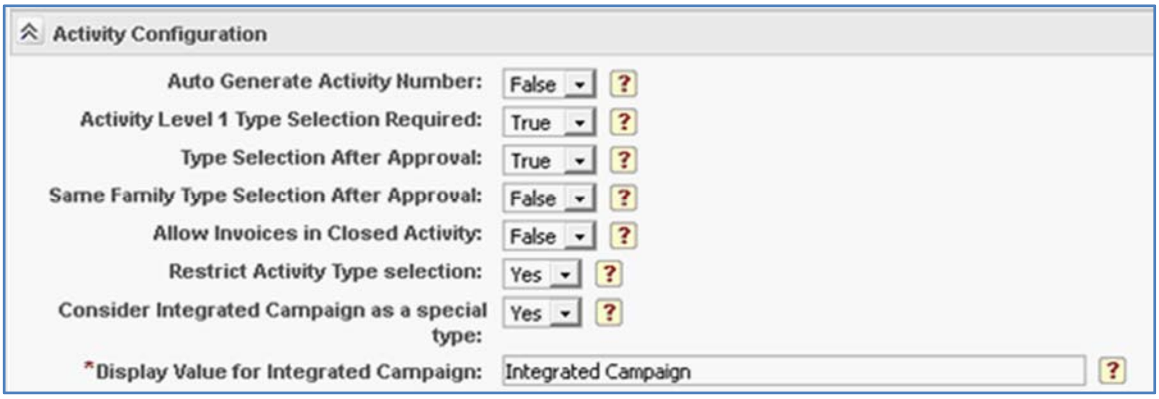


Figure No.8

Activity Configuration:		
Settings	**Expected Values**	**Explanation**
Auto Generate Activity Number	True / False	This setting is to have the Activity number (at all levels of the Activity) auto generated. Select True to auto generate the Activity number, this is a read only field. False will keep the Activity number editable.
Activity Level 1 Type Selection Required	True / False	On setting this flag, type selection at the Activity level 1(typically a Campaign) is enabled or disabled. Select False to disable the selection of the type. The default is set to True.
Type Selection After Approval	True / False	In cases where the budget approval process is followed, the type selection can be disabled after the budget has been approved This setting can be used to disable the type selection, select False for the same. The default is set to True.
Same Family Type Selection After Approval	True / False	In cases where the budget approval process is followed, the type selection can be enabled after the budget has been approved. This setting can be used to allow the type selection, but only from the same family.
Allow Invoices in Closed Activity	True / False	In cases where invoices are received after the activity is closed, invoices can be added in such activity. Using this setting user will be able to create invoices in the closed

		activity.
Restrict Activity Type selection	Yes/No	If this setting is Yes, then only the activity types belonging to the program will be available for selection at the campaign level and so on. For example: if a Program level activity is of the type 'Advertising', only its sub types such as 'Advertising - TV' and 'Advertising - Print Media' will be available for selection at the Campaign level. If this setting is No then all the activity types will be available for selection.
Consider Integrated Campaign as a special type	Yes/No	This will come up only if Restrict Activity Type selection is set to Yes. If this setting is Yes, and the named hierarchy for Activity Type has 'Advertising', 'Direct Marketing' and 'Integrated Campaign' as root level types, User can select 'Integrated Campaign' at Program level. 'Advertising' and 'Direct Marketing' along with their children will be available for selection at Campaign level for the Program of the type Integrated Campaign. If it is No, the subtypes configured for IC will be shown for selection.
Display Value for Integrated Campaign		Here, enter the name that the customer wants to call an Integrated Campaign. This value is always at the root level in the Marketing Activity Type named hierarchy.

Activity Path Configuration

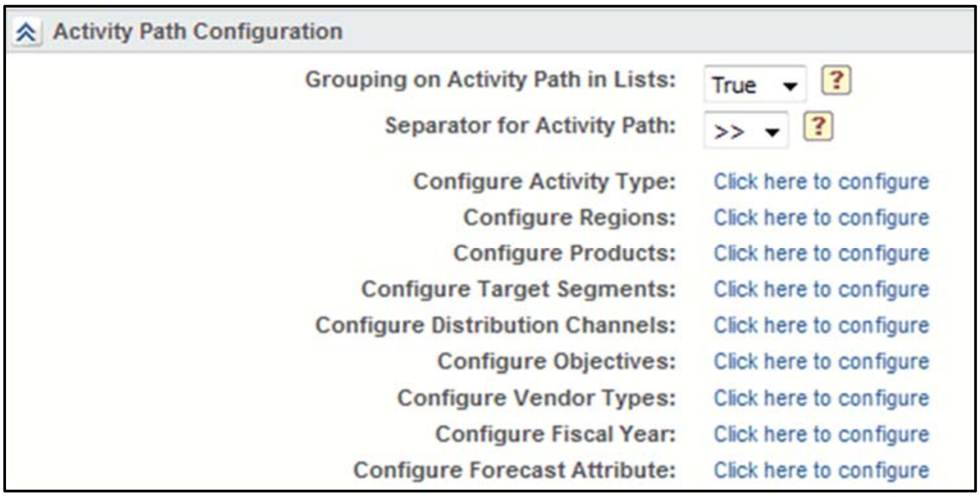


Figure No.9

Activity Path Configuration:		
Settings	**Expected Values**	**Explanation**
Grouping on Activity in	True / False	The activity path is stored for each activity from the plan

Lists		level. This activity path can be displayed on the lists either as a column or as a grouping.
Separator for Activity Path	>>, >, -, /, \, ->, =>	The separator between each level can be configured. This separator is applied both on the list and the reports screens. The default is >>

The other activity configuration parameters that can be set are as follows:

- Activity types can be configured as a hierarchy of values. To configure the types click on the '**Click here to configure**' link next to the title configure activity type. A named hierarchy details screen is displayed. It shows the existing hierarchy for the activity types.

Figure No.10

- Select the radio button at the level at which you wish to add values to the hierarchy. Click on the 'Add **Value**' button. An add NH-Value screen is displayed.

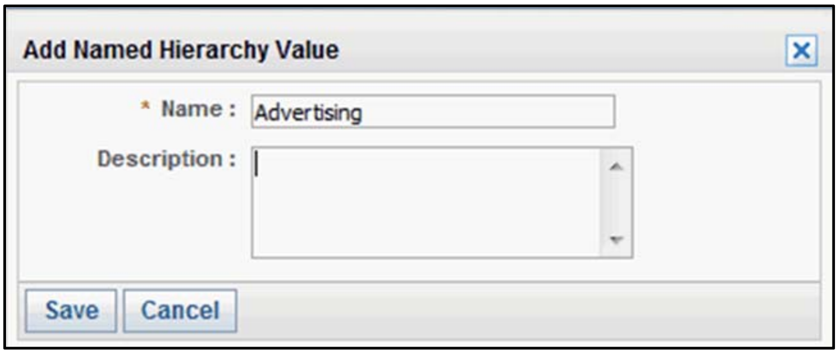


Figure No.11

- Enter the value and click on '**Save**'. The new value gets added to the hierarchy. The total number of values added under the root appears next to it. Add in more values using the same interaction. If you want to create a hierarchy within any activity type, select the appropriate radio button and follow the steps to add the value.

The above procedure is used to configure all the below activity configuration parameters:

- **Regions**: Regions are selected while configuring the business units in strategic planner. This is a single level named hierarchy.
- **Products**: Products are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.
- **Target Segments**: Target segments are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.
- **Distribution Channels**: Distribution channels are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.
- **Objectives**: Objectives are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.
- **Vendor Types**: Vendor types are selected while configuring the vendors in planner. This is a single level named hierarchy.
- **Fiscal Year**: Fiscal Year is selected for a plan. This is a single level named hierarchy with pre-configured values from 2000-2010. New values can be added if required.
- **Forecast Attribute**: Forecast attribute is selected while forecasting at the plan and activity levels. This is a single level named hierarchy and values can be configured into this named hierarchy. These values are available for selection during forecasting.

Plan Authors Access

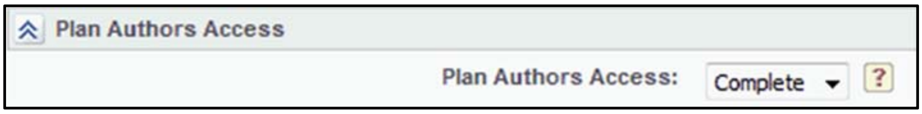


Figure No.12

The access for the plan author can either be:

1. **Partial** - If it is set to partial then the plan author can add and delete programs, readers, attachments and can initiate or close reviews.
2. **Complete** - If it is set to complete the author can perform all the above-mentioned operations along with other operations like editing budget information which otherwise can be done by the Plan Creator.

Versioning

Figure No.13

Versioning can be done on the plan and the activity screens. Expected value for versioning is:

3. **True** - If the versioning required is set to true, then the versions tab will be displayed on the read only plan and activity details screen. The '**Save Version**' button on the Info tab for these screens will also be displayed.
4. **False** – If versioning required is set to false then the above-mentioned feature will not be available.

User Roles Configuration

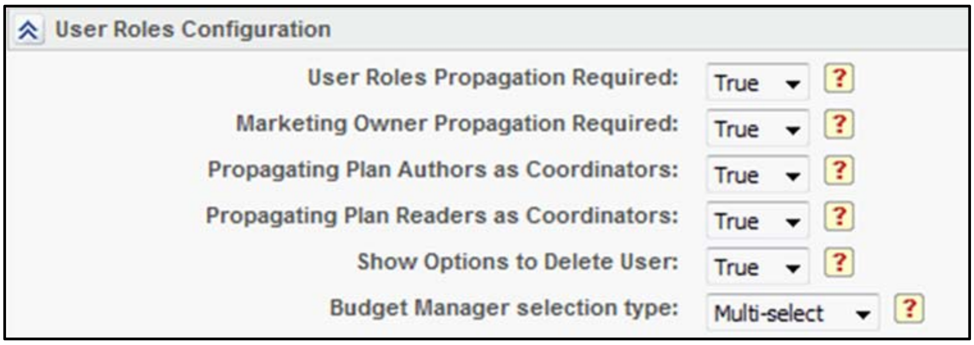


Figure No.14

User Role Configuration:		
Settings	**Expected Values**	**Explanation**
User Roles Propagation required	True/False	If this setting is set to true then the marketing activity is created at lower levels, the user roles selected at the higher level get propagated into the newly created marketing activity. The default is true.
Marketing Owner Propagation required	True/False	This setting allows specifying whether the user's having the role of marketing owner should be propagated or not. The default value is false. In this case, the users with the role of marketing owner will not be propagated while creating lower level marketing activities.
Propagating Plan Authors as Coordinators	True/False	This configuration setting allows the user to specify whether the authors at the plan level should be propagated as coordinators at lower levels or not. The default value is true. In this case, the authors at the plan level will be propagated as coordinators while creating lower level marketing activities.
Propagating Plan Readers as Coordinators	True/False	This configuration setting allows the user to specify whether the reader's at the plan level should be propagated as coordinators at lower level or not. The default value is true. In this case, the readers at the plan level will be propagated as coordinators while creating the lower level marketing activities.

Show Options to Delete User	True/False	This configuration setting allows the user to specify whether the deletion of a user at any level should result in deletion of the same user at all the lower levels or not. The default value is false. In this case, the user will be deleted at the current level only.
Budget Manager selection type	Multi-select/ Single-select	This setting indicates whether the budget manager selection at the activity level should be multiple or a single selection.

Estimates

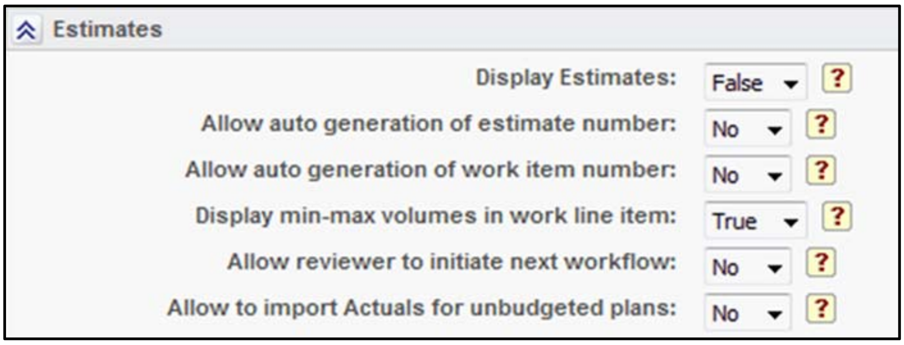


Figure No.15

Estimates:		
Settings	**Expected Values**	**Explanation**
Display Estimates	True / False	If the display estimates is set to true, then the estimate list will be shown in the expenses tab.
Allow auto generation of estimate number	Yes/No	If this field is set to Yes, then the estimate number will be generated automatically. If set to No then the user needs to enter the estimate number.
Allow auto generation of work item number	Yes/No	If this field is set to Yes then the vendor number will be generated automatically. If set to No then the user needs to enter the work item number.
Display min-max volumes in work line item	True / False	If this field is set to true, then minimum and maximum volume columns will be displayed in the work line item list.
Allow reviewer to initiate next workflow	Yes/No	If this field is set to yes, then the last reviewer of an 'Estimate Review Workflow' can initiate the next configured workflow provided that all the reviewers have approved the estimate.
Allow to import Actuals for unbudgeted plans	Yes/No	If this field is set to yes, then the user can import actuals for unbudgeted plans. Conditions for unbudgeted plans: 1. Plans do not exist in the system at all. 2. Plans exist in the system but the work item no. does not exist.

		3. Plans and work item no. exists but the work line item for the mentioned resource does not exist.

Vendor Management

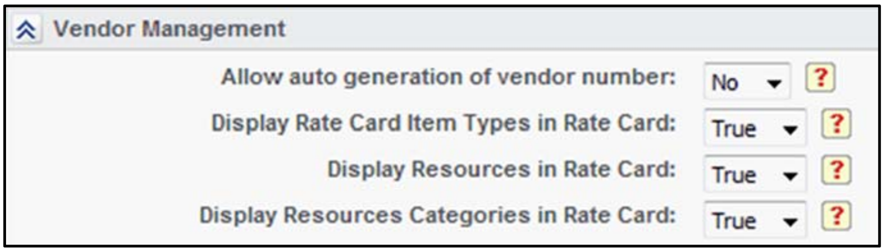


Figure No.16

Vendor Management:		
Settings	**Expected Values**	**Explanation**
Allow auto generation of vendor number	Yes/No	If this field is set to Yes, then the vendor number will be generated automatically. If set to No then the user needs to enter the vendor number.
Display Rate Card Item Types in Rate Card	True/False	If this value is set to true, then the rate card item types will be displayed for selection while creating a rate card.
Display Resources in Rate Card	True/False	If this value is set to true, then the vendor resources will be displayed for selection while creating a rate card.
Display Resources Categories in Rate Card	True/False	If this value is set to true, then the resource categories will be displayed for selection while creating a rate card.

Commitment Approvals Configuration

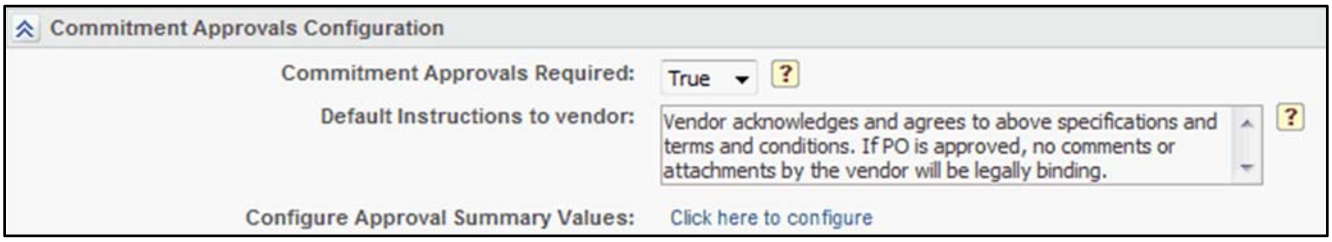


Figure No.17

Commitment Approvals Configuration:		
Settings	**Expected Values**	**Explanation**
Commitment Approvals required	True/False	This indicates whether a commitment requires approval or not.
Default Instructions to vendor	User defined	These instructions will appear by default for the vendor resource selected for the approvals of a commitment.

Configure Approval Summary Values		For the approval of commitments the summary value can be defined.

Expense Configuration

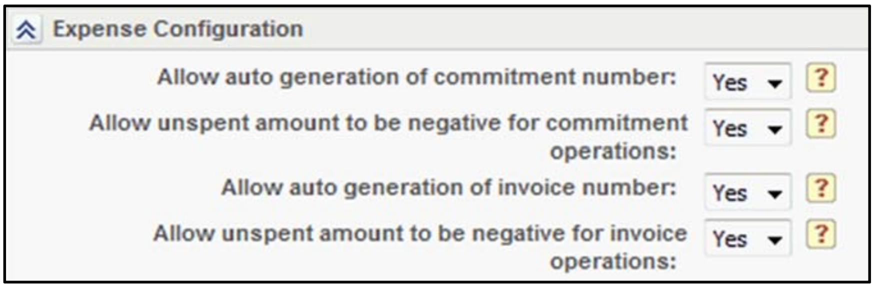


Figure No.18

Expense Configuration:		
Settings	**Expected Values**	**Explanation**
Allow auto generation of commitment number	Yes/No	If this field is set to yes, then the commitment number will be generated automatically. If set to No then the user needs to enter the commitment number.
Allow unspent amount to be negative for commitment operations	Yes/No	If this setting is set to yes, the unspent amount can become negative if a commitment is added or updated. If it is set to no, the user is not allowed to add or edit the commitment if unspent amount becomes negative due to that operation.
Allow auto generation of invoice number	Yes/No	If this field is set to yes, then the invoice number will be generated automatically. If set to no then the user needs to enter the invoice number.
Allow unspent amount to be negative for invoice operations	Yes/No	If this setting is set to yes, the unspent amount can become negative if an invoice is added or updated. If it is set to no, the user is not allowed to add or edit the invoice if unspent amount becomes negative due to that operation. If an invoice is added to a commitment and field is set to no, then invoice amount cannot exceed the committed amount.

Best Practice Builder

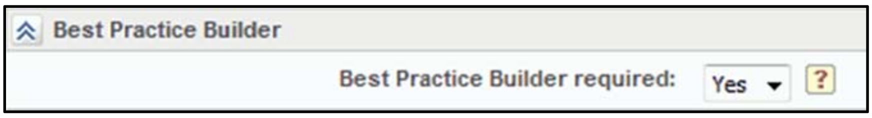


Figure No.19

Best Practice Builder:		
Settings	**Expected Values**	**Explanation**

Best Practice Builder required	Yes/No	If the Best Practice Builder required is set to True then the measurement types for the scorecard and brief, project types for workflows will be displayed according to the activity type configuration.

Change Management Configuration

Figure No.20

Change Management Configuration:		
Settings	**Expected Values**	**Explanation**
Track Change History required	Yes/No	If Track Change History required is set to Yes then the changes made to the Plan and the Marketing Activity will be tracked. Also the property "TrackChangeHistory" in Plan and Marketing Activity forms will be set to "True".

Resource Category Forecast

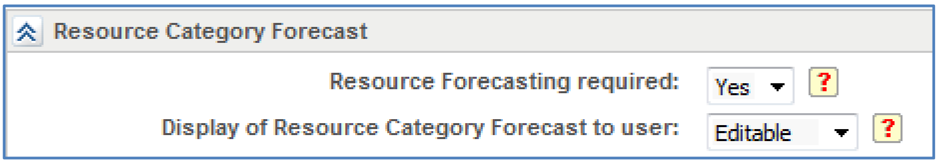


Figure No.21

Resource Category Forecast:		
Settings	**Expected Values**	**Explanation**
Resource Forecasting Required	Yes/No	If set to Yes, this will allow Resource Forecasts to be entered in Strategic Planner in the Resources Tab.
Display of Resource Category Forecast to user	Read-only/ Editable	If set to Editable, the Resource Category Forecast will be editable on the Activity screens - Resource Tab to the user. If Set to Read-only, the Category Forecast will be allowed to be imported for the Plan hierarchy but will not be editable on the Activity screen - Resource Tab.

Activity Nomenclature

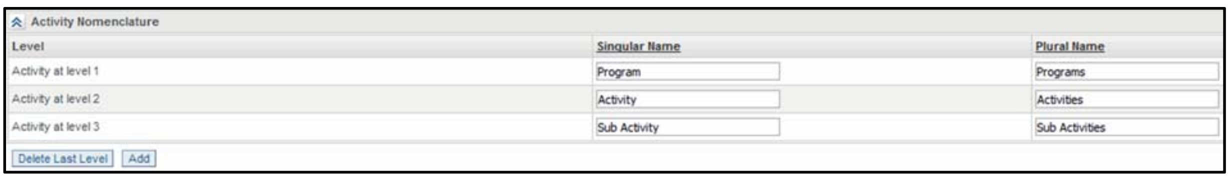


Figure No.22

Activity Nomenclature:			
Settings	**Expected Values**		**Explanation**
Level	**Singular**	**Plural**	Activities at each level can be given a different name. In the nomenclature section, default names for the first three levels are shown. The singular name can be set where the title should appear for the single entity. For the name to be given in cases of multiple occurrences for example: in lists etc., the plural name is provided. Click on the '**Add**' button to specify names for more levels. The default values are activity and activities for singular and plural respectively.
Activity at Level 1	Program	Programs	
Activity at Level 2	Campaign	Campaigns	
Activity at Level 3	Activity	Activities	
Activity at Level 4	Sub-Activity	Sub-activities	

Marketing Parameters Nomenclature

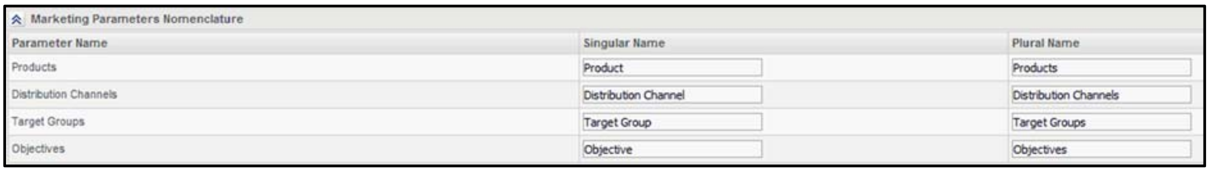


Figure No.23

Marketing Parameters Nomenclature:			
Settings	**Expected Values**		**Explanation**
Level	**Singular**	**Plural**	Marketing Parameters are associated with the activities at any level. The objectives are also associated with the plan level.
Products	Product	Products	
Distribution Channel	Distribution Channels	Distribution Channel	
Target Groups	Target Group	Target Groups	
Objectives	Objective	Objectives	

Marketing Parameters Configuration

Figure No.24

Marketing Parameters Configuration:

Settings	Expected Values	Explanation
Show Marketing Parameter Path	True/False	Whether to show the whole path for a selected marketing parameter or only the selected value.
Separator for Marketing Parameter Path	-	The separator for the marketing parameters path is not a free flow text but a selectable value from the list box. Default is -.
Restrict Objective(s) selection	True/False	This setting will restrict the selection of the objective(s) from the higher level only and deletion from the lower levels.

Strategic Planner Report Configuration

Figure No.25

The section for the Strategic Planner Report Configuration covers the settings required for the reports specific to the Strategic Planner. The settings are:

Strategic Planner Report Configuration:		
Settings	**Expected Values**	**Explanation**
Fiscal Month for the Previous Year	Yes/No	This setting indicates whether the start of the marketing calendar report is the fiscal month of the previous year e.g. If for a plan, the fiscal year is 2008, the fiscal month is November and this setting is yes, then the marketing calendar starts from November 2007. The default is no.
Totals for Report Required	True/False	This setting indicates whether the totals are to be displayed on the report or not. The default is true.

Access Control Configuration

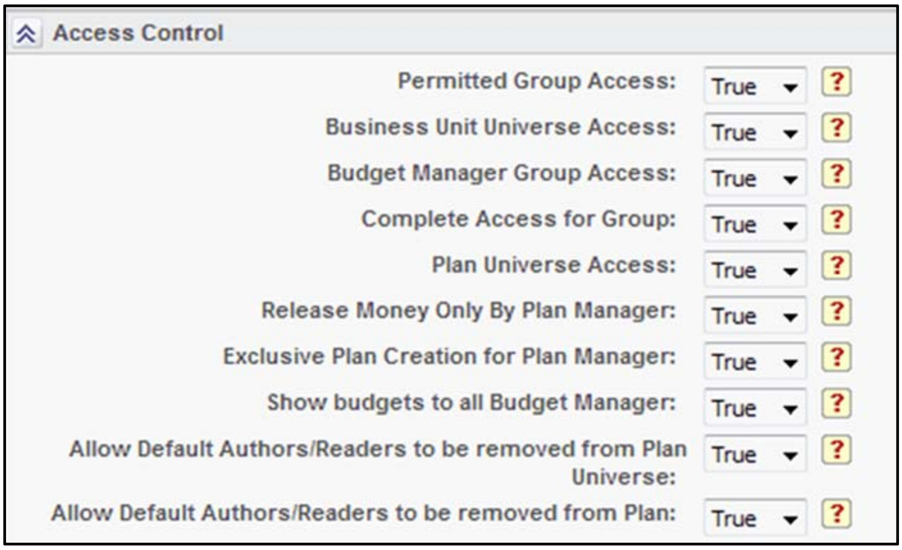


Figure No.26

Access Control configuration:		
Settings	**Expected Values**	**Explanation**
Permitted Group Access	True / False	A set of groups can be selected as permitted groups. The users of these groups only would be available for any user selection (e.g. authors/readers in a plan, coordinators/readers in an activity etc) throughout the Strategic Planner solution. To enable this setting, first select true in the list box for the permitted group access. Click on the '**Add Group**' button and select the groups for this access.
Business Unit Universe Group Access	True / False	This setting indicates whether the feature of Business Unit Universe is required or not. If this is set to True, universe of users/groups have to be selected at the Business Unit level. Only those users and groups present in the Business Unit Universe will be available for selection for the roles of Author, Reader, Coordinator and Owner in Plan and its Marketing Activities.
Budget Manager Group Access	True / False	A set of groups can be selected as a budget manager group. The users of this group only would be available for the selection of budget managers. Also, if this setting is set to true, all the users of this group can view all the budgets. To enable this setting, first select true in the list box for the budget manager group access. Click on the '**Add**

		Group' button and select the group for this access.
Complete Access For Group	True / False	In Strategic Planner, there can be a set of groups set to have complete access on all the plans and the levels below. These would typically be the plan managers who need the highest authority to change anything in any plan/campaign/activity. To enable this setting, first select true in the list box for the complete access for a group. Click on the '**Add Group**' button and select the groups for this access.
Plan Universe Access	True / False	This feature allows defining of a universe of users and/or groups at the plan level. If set to true all the user roles in the plan and its programs/campaigns/activities and sub-activities below can be selected from this universe only. The default setting is False.
Release Money only by Plan Manager	True / False	If the setting for complete access for group is set to true, then only the users having complete access to plans can release unutilized money allocated to campaigns/activities.
Exclusive Plan Creation for Plan Manager	True / False	If the setting for complete access for group is set to true then creation of plans can be restricted to a specific group of users only. To enable this, set the value to true. Only the user groups having complete access can have this access.
Show Budgets to all Budget Managers	True / False	If the setting for budget manager group access is set to true then all budgets can be accessed by the users in the budget managers group. If set to false, each user can access the budgets assigned to the individual.
Allow Default Authors/Readers to be removed from Plan Universe	True / False	For the business unit, default groups as authors and readers can be specified. These default author and reader groups are added into the plan universe when a plan is created. This setting indicates whether a user is allowed to delete the default authors and readers from the plan universe or not.
Allow Default Authors/Readers to be removed from Plan	True / False	For the Business unit, default groups/users as authors and readers can be specified. These default author and reader groups/users are added into the Plan when Plan is created. If this setting is False, the default Authors and Readers that have been added to the Plan Universe cannot be removed.

After all the settings are DONE, save the settings by clicking on the '**Save**' button at the bottom of the planner settings screen. To cancel the operation click on the '**Cancel**' button.

Marketing Workbench Configuration

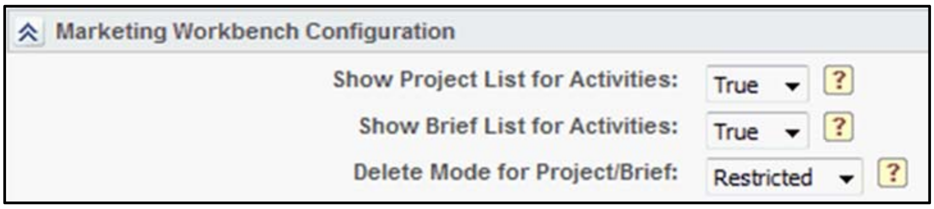


Figure No.27

Marketing Workbench Configuration:		
Settings	**Expected Values**	**Explanation**
Show Project list for Activities	True/False	Whether to show the project list for a selected activity or not. Default is true.
Show Brief list for Activities	True/False	Whether to show the brief list for a selected activity or not. Default is true.
Delete mode for Project, Brief	Restricted/Authorized	Projects/Briefs with active status cannot be deleted when value is restricted and Projects/Briefs with active status can be deleted when value is authorized.

After configuring all the settings, Save the settings.

8.1.2. Business Units

Click on the '**Business Units**' link of the left pane to view the existing business units. Each business unit is displayed with information such as name, description, region and is obsolete (shows the status of the business unit as obsolete or active). To view and edit the details click on the name link in the business unit list.

To configure new business units click on the '**New**' button and enter the following details:

- **Name and Description** – The name and description of the business unit.
- **Region** – Select the region of the business unit.
- **Currency Type** – The currency used.
- **Mark As Obsolete** – Specify whether the business unit is obsolete.

Add the default authors and readers (groups) by clicking on the '**Add Group**' button and default authors and readers (users) by clicking on the '**Add User**' button. If the setting for the permitted groups is set to true then the users/groups selected here are from the permitted groups or else they are from the entire system.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 27)**.

Facets can be associated with a Business unit. For creating facets see the Schema Designer guide. These facets need to be associated with the '**BUSINESSUNIT**' Entity.

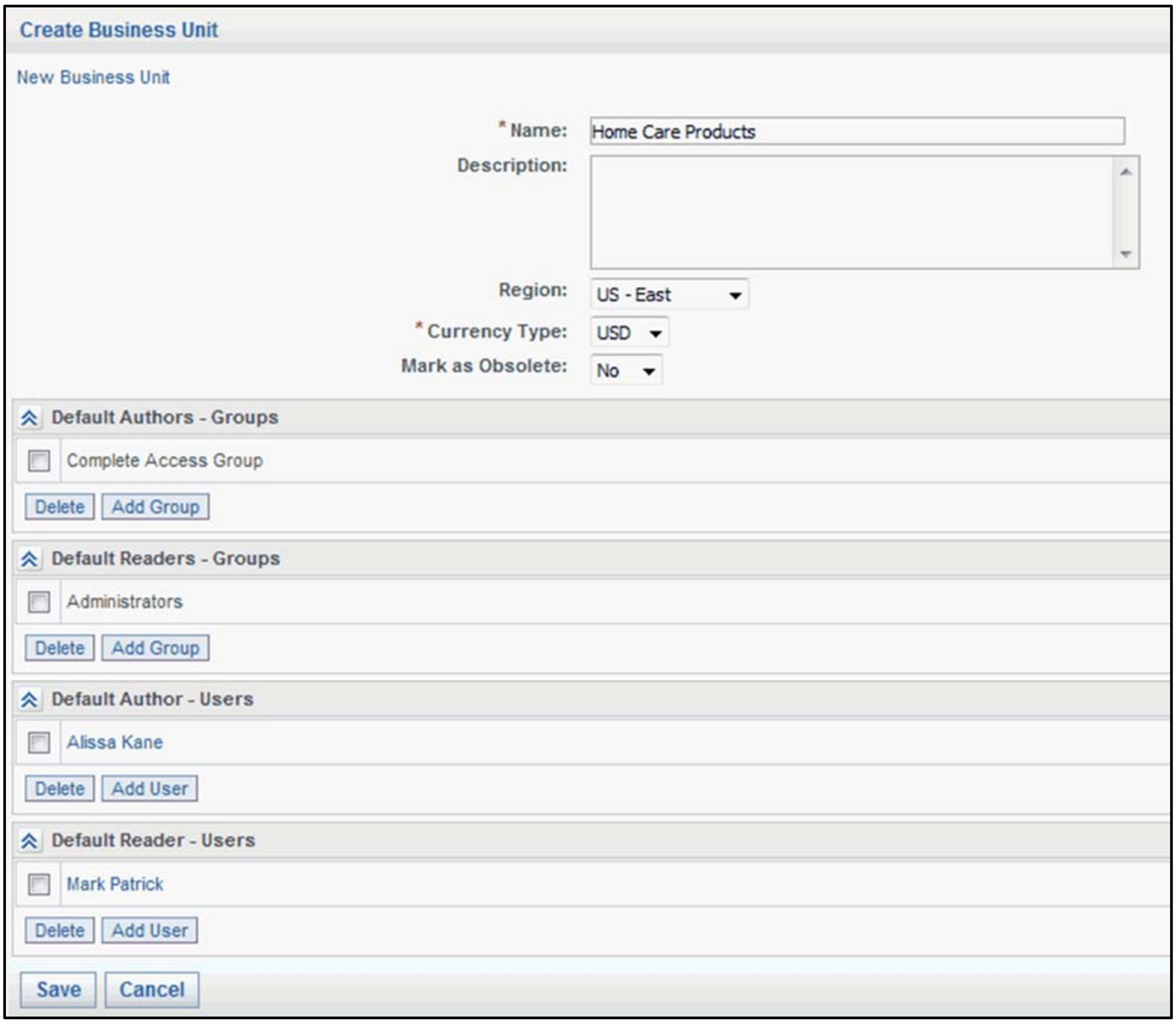


Figure No.28

8.1.3. Cost Centers

Click on the '**Cost Centers**' link on the left pane to view the existing cost centers. Each cost center is displayed with details such as name and is obsolete (status of the cost center as obsolete or active). To view and edit the details click on the name link of the cost center in the list.

To configure new cost centers click on the '**New**' button and enter the following details:

- **Name** – The name of the cost center
- **Business Unit** – Select the business unit for the cost center by clicking on the '**Select**' button, to delete the business unit click on the '**Remove**' button.
- **Mark As Obsolete** – Specify whether the cost center is obsolete

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 28)**.

Facets can be associated with a Cost Center. For creating facets see the Schema Designer guide. These facets need to be associated with the '**COSTCENTERS**' Entity.

Figure No.29

Cost centers can be configured per business unit based on a configuration setting.
Selection of business units is provided on the create/edit cost center screen. If the setting is set to true, the business unit selection is mandatory.

8.1.4.Forecast Duration

Flexible forecast durations per fiscal year as per the business needs can be configured. Forecast amounts for these periods at various activity levels in Planner can be configured.
To configure forecast duration click on the '**Forecast Duration**' link on the left pane. An existing list is displayed.
To view and edit the details click on the name link of the forecast duration in the list.
To configure new forecast durations click on the '**New**' button and enter the following details:

- **Fiscal year** – Select the fiscal year from the drop down list
- **Plan Level/Activity Level 1/ Activity Level 2** – Select the valid combinations for forecast duration at the Plan, Activity Level 1 and Activity Level 2

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 29)**.

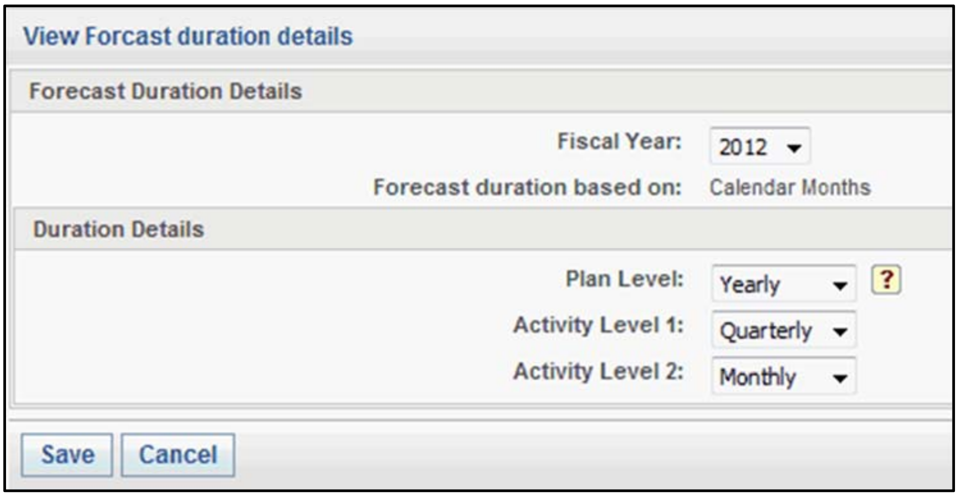


Figure No.30

8.1.5. Activity Templates

Click on the '**Activity Template**' link on the left pane to view the existing activity templates. Each row of the list gives details such as the title, description and type. To view and edit the activity templates click on the title link in the template list.

To create a new activity templates click on the '**New**' button and enter the following details on the create activity template screen with the following sections:

Details for the Activity Template:

- **Title** – The name of the activity template
- **Description** – The description
- **Activity Type** – Select the type of the activity by clicking on the '**Select**' button

The following Marketing Parameters can be added:

- Products
- Target Groups
- Distribution
- Objectives

The above parameters can be added by clicking on the '**Add**' button and existing parameters can be selected and deleted by clicking on the '**Delete**' button.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button.

8.1.6. Financial Accounts

Click on the '**Financial Accounts**' link on the left pane to view the existing financial accounts list. Each row of the list gives details such as name, description and is obsolete (status of the financial account as obsolete or active). To view and edit financial accounts click on the name link in the list.

To create a new financial account click on the '**New**' button and enter the following details:

- **Name** – The name of the financial account.
- **Description** – The description.
- **Financial Account Number** – Specify the financial account number.
- **Mark As Obsolete** – Specify whether the financial account is obsolete.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button.

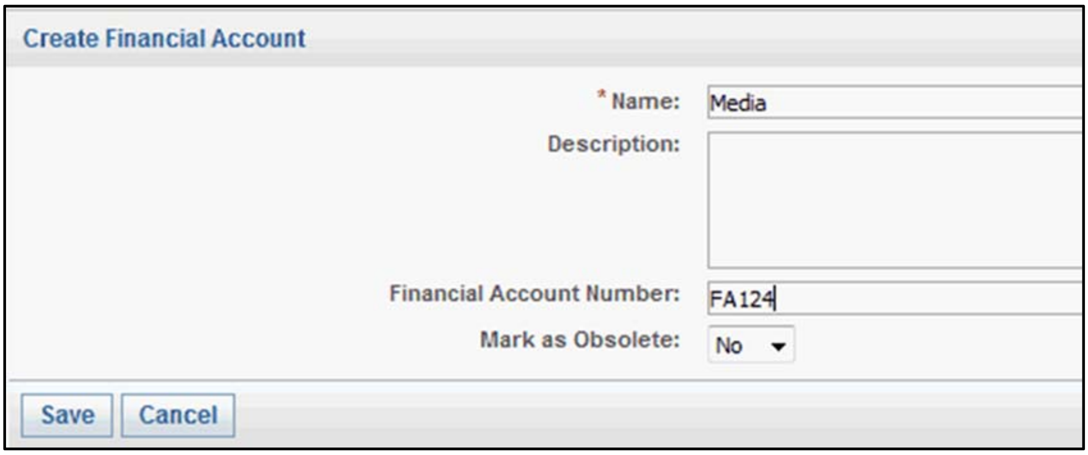


Figure No.31

Facets can be associated with a Financial Account. For creating facets refer to the Schema Designer guide. These facets need to be associated with the '**FINANCIALACCOUNT**' Entity.

8.1.7.Cost Categories

Click on the '**Cost Categories**' link on the left pane to view the existing cost categories list. Each row of the list gives details such as name, description and is obsolete (status of the cost categories as obsolete or active). To view and edit cost categories click on the name link in the list.

To configure a new cost category click on the '**New**' button and enter the following details:

- **Name and Description** – The name and description of the cost category.
- **Cost Category Number** – Specify the cost category number.
- **Financial Account** – Specify the financial account by clicking on the '**Select**' button.
- **Business Unit** - Specify the business unit by clicking on the '**Select**' button.
- **Mark As Obsolete** – Specify whether the cost category is obsolete.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 30)**.

Note: The financial accounts must be added before entering the cost categories, as each cost category is associated with a relevant financial account.

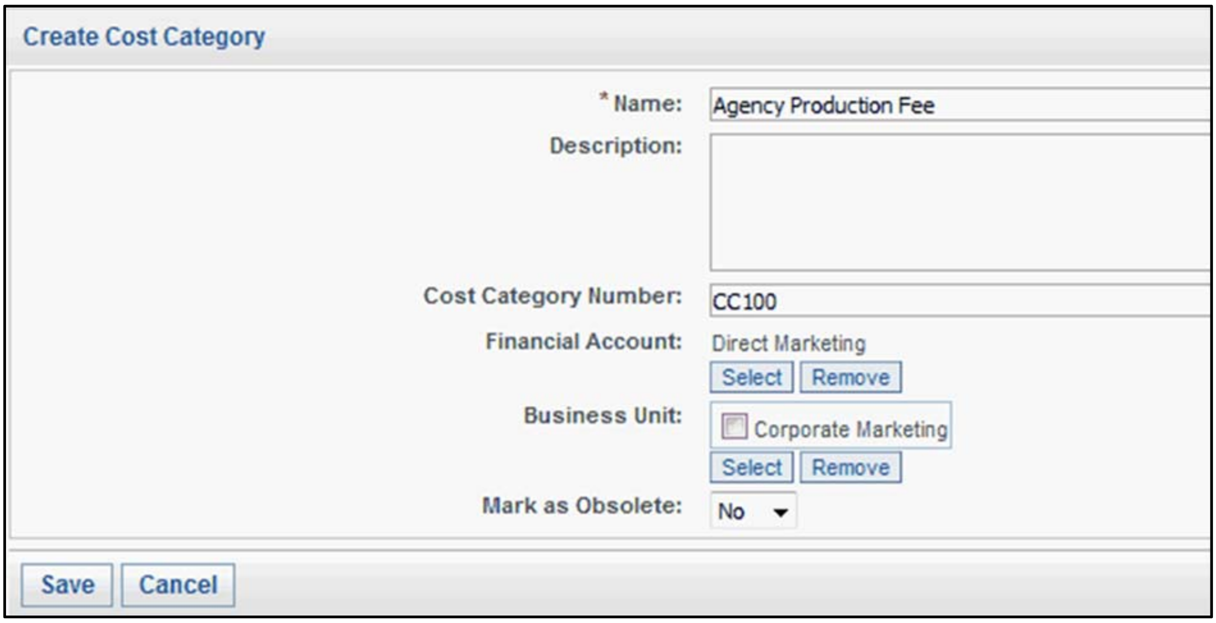


Figure No.32

Cost category can be configured per business unit based on a configuration setting.
Selection of business units is provided on the create/edit cost category screen. If the setting is set to true, the business unit selection is mandatory.

8.1.8. Exchange Rates

Figure No.33

Click on the '**Exchange Rates**' link on the left pane to view the existing exchange rates list. The conversion rate for each currency type is set for the tenant. The exchange rates can be searched for by giving filters such as the currency display name, currency name, exchange start and end dates and then clicking on the '**Search**' button. The exchange rate list is displayed by default. Exchange rate can be viewed by clicking on the name link. To add new exchange rates by click on the '**Add**' button **(Figure 30)**. Enter details such as the currency name, currency display name, conversion rate, from and to dates. To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button.
Upload the exchange rates clicking on the '**Upload Exchange Rate**' link on the left pane and browse and upload an excel sheet.

8.1.9. Measurement Types

Strategic Planner allows the end users to measure the effectiveness of campaigns and activities by means of certain measurement parameters called measurement types. This application allows the administrator to manage the measurement types, which can be used by end user.

Click on the '**Measurement Types**' link on the left pane to view the existing measurement types list with details such as name, description, data type and is obsolete (status of the measurement type as obsolete or active). To view and edit measurement types click on the name link in the list or selecting it and clicking on the '**Delete**' button can delete it.

To configure new measurement types click on the '**New**' button and enter the following details:

- **Name and description** – The measurement type name and description.
- **Data Type** – Select the data type from a dropdown list.
- **Is Obsolete** - Status can be set as obsolete or active. If status is no then it cannot be selected in the plan/campaign/activity.
- **Activity Types** – Select the activity type by clicking on the 'Select' button.
- **Objectives** – Select the objectives by clicking on the 'Select' button.
- **Applies to which level(s)** – Specify whether the measurement type is applied to all levels or specific levels.

Range values need to be added for the data type as quantifiable and non-quantifiable. Click on the '**Add**' button and enter the display text and the weightage.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 33).**

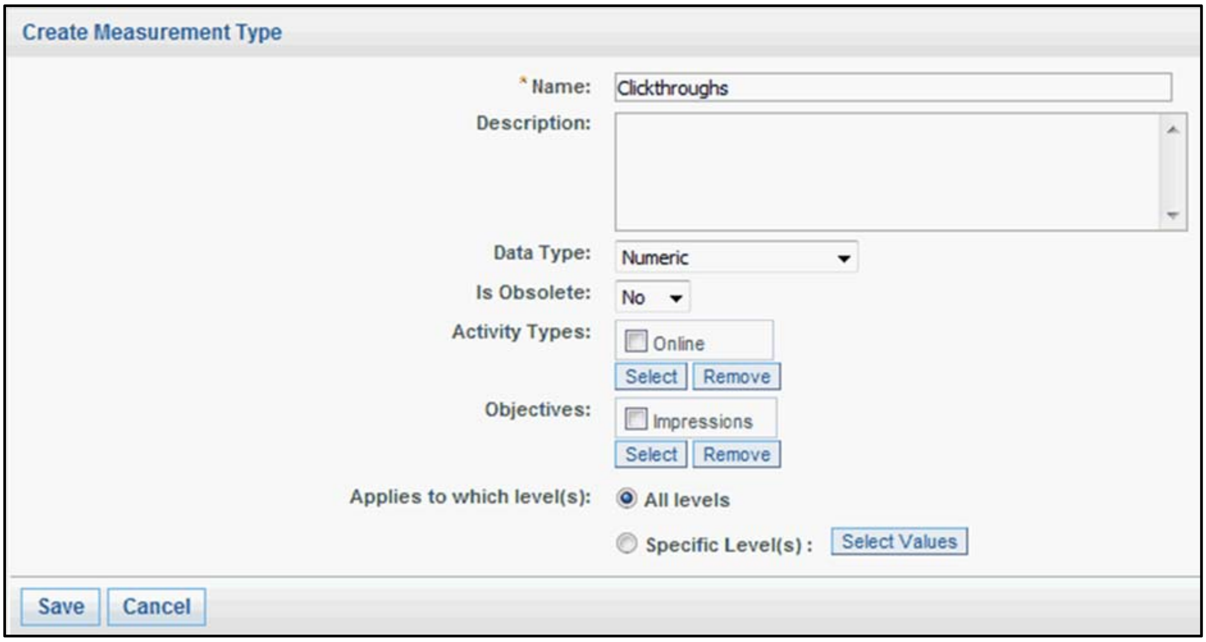


Figure No.34

8.1.10. KPI Types

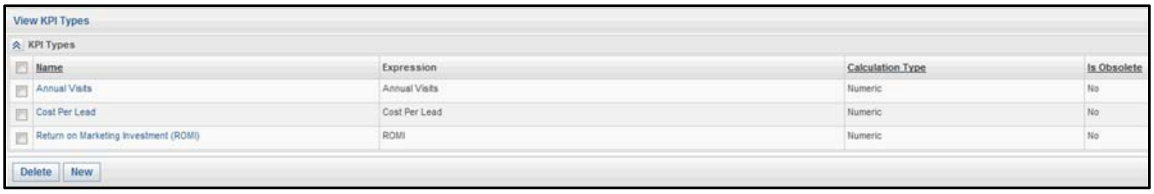


Figure No.35

Key Performance Indicators (KPI) is financial and non-financial metrics used to quantify objectives to reflect strategic performance of an organization. KPI's are used in business intelligence to assess the present state of the business and to prescribe a course of action. The act of monitoring KPIs in real-time is known as business activity monitoring. KPIs are frequently used to "value" difficult to measure activities such as the benefits of leadership development, engagement, service, and satisfaction. KPI's are typically tied to an organization's strategy (as exemplified through techniques such as the balanced scorecard).
The KPIs differ depending on the nature of the organization and the organization's strategy. They help an organization to measure progress towards their organizational goals, especially toward difficult to quantify knowledge-based processes.
A KPI is a key part of a measurable objective, which is made up of a direction, KPI, benchmark, target and time frame. For example: "Increase Average Revenue per Customer from $10 to $15 by EOY 2008". In this case, 'Average Revenue per Customer' is the KPI.

Click on the '**KPI Types**' link on the left pane to view the existing KPI types with details such as name, expression, calculation type and is obsolete (status of the KPI Type as obsolete or active). To view and edit the KPI type click on the name link or selecting it and clicking on the '**Delete**' button can delete it **(Figure 34)**.
To add new KPI types click on the '**New**' button and enter the following details:

- Name and description – The KPI type name and description.
- Display Text – The text to be displayed.
- Calculation Type – Specify whether numeric, percentage or currency.
- Precision – Applicable only if calculation type is numeric or currency.
- Is Obsolete – Specify the status of the KPI Type as obsolete or active.

In the formulae section the following can be selected for the 'Expected KPI value definition' and the 'Actual KPI value definition':

- Left Operand – Can be selected from a dropdown list.
- Operator – +, -, *, / or % can be specified.
- Right Operand – Can be selected from a dropdown list.

To save click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button **(Figure 35).**

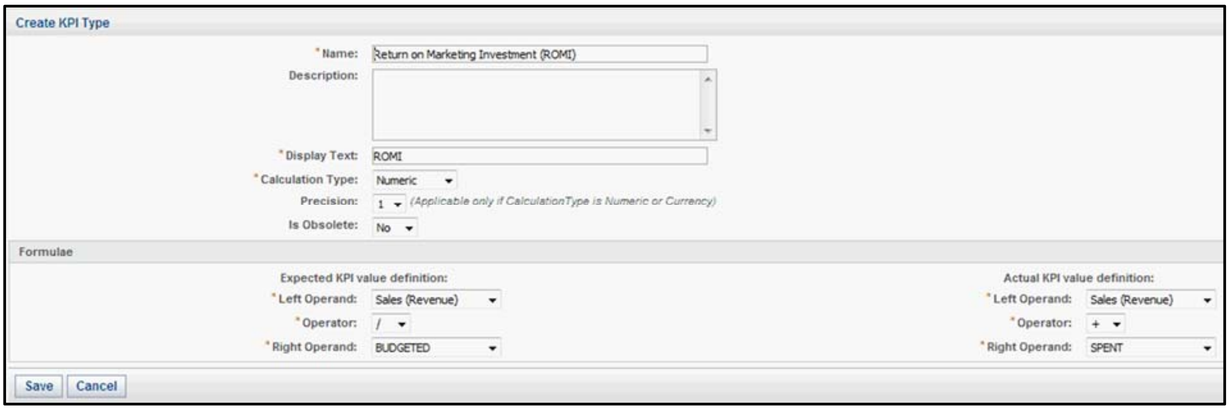


Figure No.36

8.1.11. Calendar Report Color Configuration

This utility displays two sections:

1. **Select Default Color**: The default color for all the activity types (in case explicit color is not selected) can be selected. This is the color applied for the activity types for which a color has not been configured. To select the default color, click on the color icon ' ' and select the desired default color **(Figure 32)**.
2. **Selected Activity Types**: The list of activity types for which the colors are configured is displayed. Select the activity type by clicking on the '**Select Activity Type**' button **(Figure 36)**. Select one or more activity types from the hierarchy and click on the '**Save**' button. The selected activity type appears in the list. Select the desired color for the activity type by clicking on the color icon ' ' which is against the selected activity type.

Click on '**Save'** to save all the above actions (This is important to save the colors). To cancel the operation click on the '**Cancel**' button**.**

The position of the activity type in this list sets the position of appearance of the activity type in the Activity calendar. The Marketing activities can be dragged to a desired position by clicking on the icon to determine its order of appearance in the calendar.

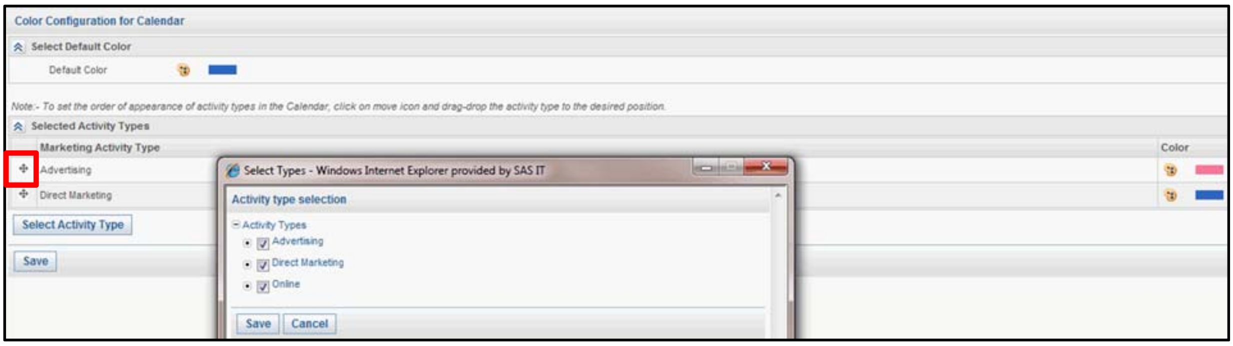


Figure No.37

8.1.12. Best Practice Builder

Click on the '**Best Practice Builder**' link on the left pane to view the existing list of best practices in the system. Click on the '**New**' button to create a best practice **(Figure 37)**.

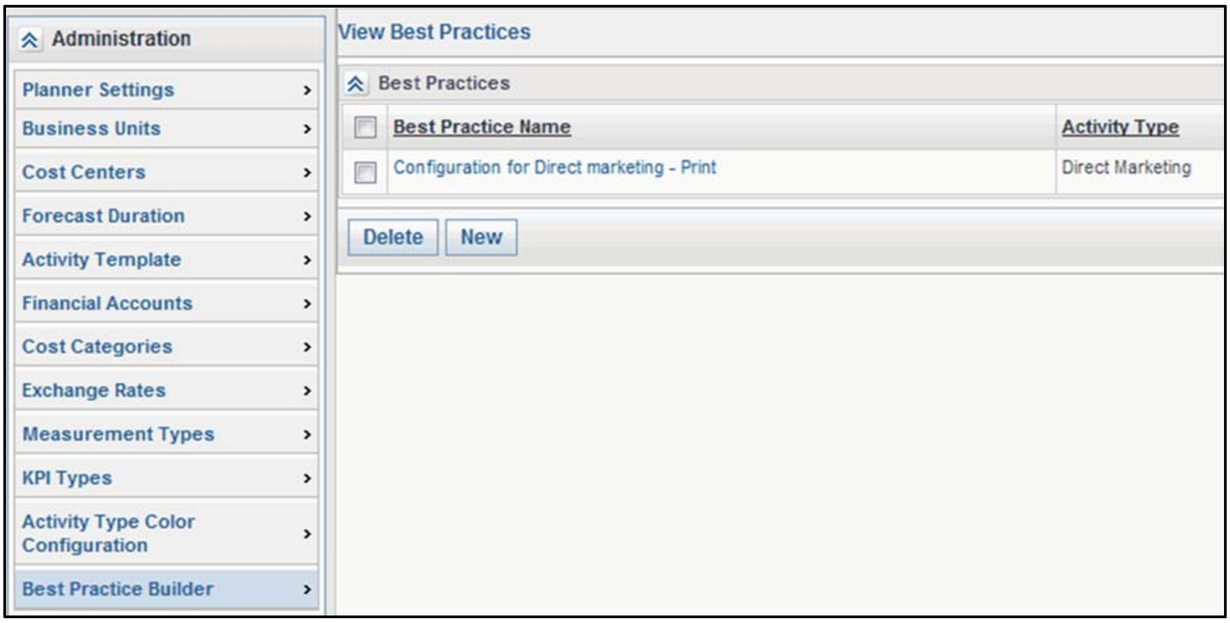


Figure No.38

A create best practice screen **(Figure 38)** is displayed where the name needs to be entered and the activity type (configured in schema designer) needs to be selected from the multi select screen.

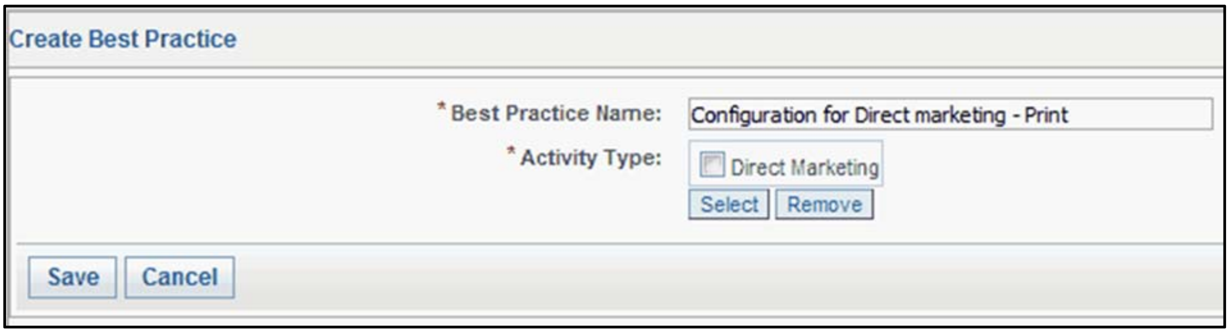


Figure No.39

After saving the best practice **Figure 39** is displayed where the configuration name and the activity type can be edited and the following sections need to be filled in:

- **Facet Types** – Different facets can be associated with the marketing activity.
- **Form** – The form per Activity Type. The form can be edited.
- **Measurement Types** – Selected measurement types configured in the system can be added here. This is the scorecard per activity type and these measurement types are associated with the activity types or objectives.

- **Workflow Brief/Project Types** - The brief and project types are associated with the specific activity types.

Note: All the fields need to be populated or else the end user will not see any information in that particular activity.

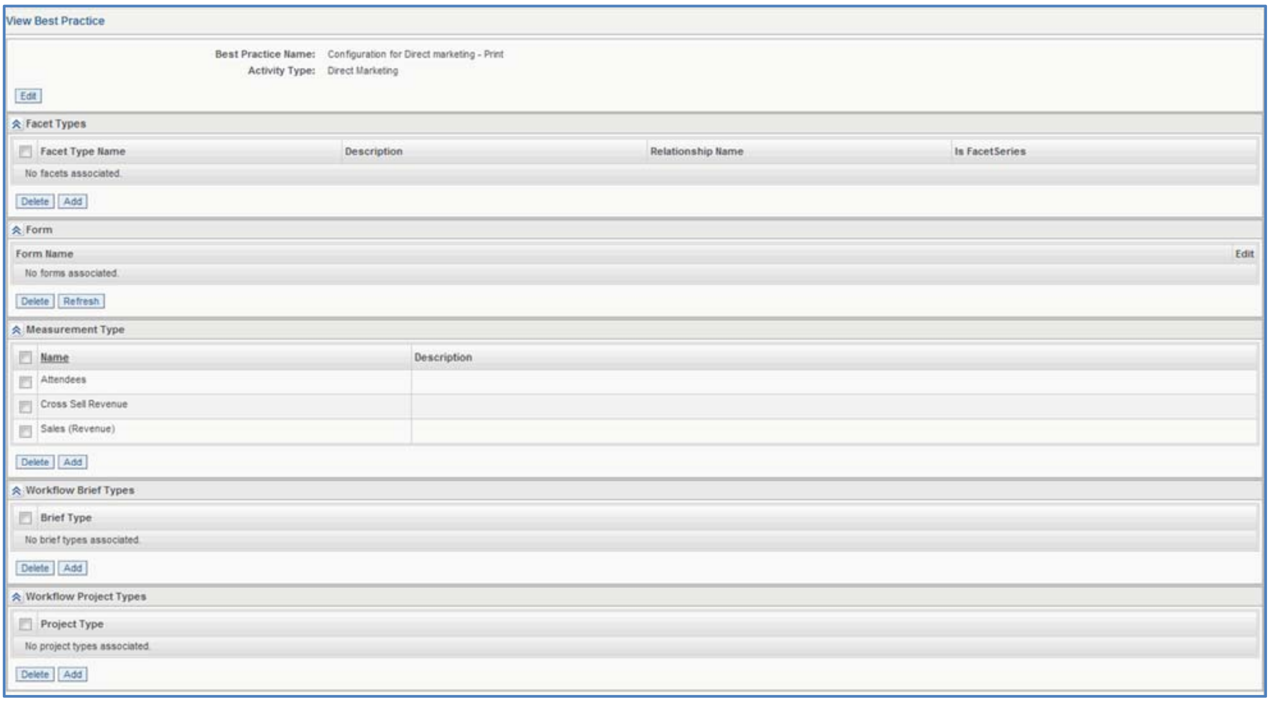


Figure No.40

8.2. Other Configurations for Planner

8.2.1. Facets for Activity

Notes:

- A utility for this is not been provided yet. The configuration is done manually for each tenant.
- In case of a load balanced setup, change should be made to the configuration file that resides in the Shared Folder and not on the file present on the solution machines.
- Type Based Facet Configuration

Different facets can be configured for each of the activity types. Also, facets can be configured to appear for all the activities irrespective of the types selected. Apart from the usual configuration in the form configuration utility, additional configuration is required for the activity for facets. This can be achieved by changes to the <RELATIONSHIPINFO TYPE="MARKETINGACTIVITY"> node in the ***SolutionConfiguration.xml*** located at the location *<Installed Directory>/ <TenantName>/ StrategicPlanner / Configuration /XML*.

Specify the relation of the facet with the marketing activity and not the facet name.

For the Common info for all the activities, configure the <COMMONINFO> node. If the facet MOREINFO having the relation MARKETINGACTIVITY_MOREINFO with the marketing activity had to appear for all activities, following would be the configuration, for example

<COMMONINFO>

<RELATIONSHIPNAME>

MARKETINGACTIVITY_MOREINFO

</RELATIONSHIPNAME>

</COMMONINFO>

For the specific activity type info, configure the <*SPECIFICINFO*>node.

For the activity type Sponsorship, two facets are configured as below, for example.

<*SPECIFICINFO* TYPE="Sponsorship">

<*RELATIONSHIPNAME*>

MARKETINGACTIVITY_TESTFACET1

</*RELATIONSHIPNAME*>

<*RELATIONSHIPNAME*>

MARKETINGACTIVITY_TESTFACET2

</*RELATIONSHIPNAME*>

</*SPECIFICINFO*>

- Level Based Facet Configuration

Different facets can be configured for each of the activity levels. Apart from the usual configuration in the form configuration utility, additional configuration is required for the activity for facets. This can be achieved by changes to the <RELATIONSHIPINFO TYPE="MARKETINGACTIVITY">node in the ***SolutionConfiguration.xml*** located at the location *<Installed Directory>/ <TenantName>/ StrategicPlanner / Configuration /XML*.

Specify the relation of the facet with the marketing activity and not the facet name. For configuring the facets for each activity level, configure the <LEVELWISEINFO> node. For each level there would be a <RELATIONSHIPINFO LEVEL="1"> node present.

Specify each facet for a level into its corresponding level node, for example.

<RELATIONSHIPNAME>
MARKETINGACTIVITY_DM_CAMPAIGNINFO
</RELATIONSHIPNAME>

The overall configuration for a level will appear as follows, for example.

```
<RELATIONSHIPINFO LEVEL="2">
    <RELATIONSHIPNAME>
        MARKETINGACTIVITY_MARCOM_ACTIVITY_INFO
    </RELATIONSHIPNAME>
    <RELATIONSHIPNAME>
        MARKETINGACTIVITY_MARKETINGACTIVITYINFO
    </RELATIONSHIPNAME>
</RELATIONSHIPINFO>
```

After updating the solution configurations update the versionconfiguration.xml with:

```
<RELATIONSHIP NAME="MARKETINGACTIVITY_OFFER">
- <SELECTLIST>
- <EXPRESSION>
  <FIELDNAME>OFFERID</FIELDNAME>
  <ALIAS>OFFERID</ALIAS>
  </EXPRESSION>
- <EXPRESSION>
  <FIELDNAME>OFFERNAME</FIELDNAME>
  <ALIAS>OFFERNAME</ALIAS>
  </EXPRESSION>
  </SELECTLIST>
  </RELATIONSHIP>
</RELATIONSHIPLIST>
```

The facet and specific fields in the facet can be specified for versioning. The administrator will need to specify the relationship name.

8.2.2. Move Activity Configurations

The move activity feature has the configuration for the roles having access control and the notifications. The XML structure is as follows:

```
<MOVEACTIVITYNOTIFICATIONS>
    <DESTINATIONUSERROLES>
        <USERROLE>MARKETING_ACTIVITY_COORDINATOR</USERROLE>
        <USERROLE>MARKETING_ACTIVITY_CREATOR</USERROLE>
        <USERROLE>MARKETING_ACTIVITY_OWNER</USERROLE>
        <USERROLE>BUDGETMANAGER</USERROLE>
    </DESTINATIONUSERROLES>
    <SOURCEUSERROLES>
        <USERROLE>MARKETING_ACTIVITY_COORDINATOR</USERROLE>
        <USERROLE>MARKETING_ACTIVITY_CREATOR</USERROLE>
```

```
        <USERROLE>MARKETING_ACTIVITY_OWNER</USERROLE>
        <USERROLE>BUDGETMANAGER</USERROLE>
    </SOURCEUSERROLES>
    <ACTIVITYUSERROLES>
        <USERROLE>MARKETING_ACTIVITY_COORDINATOR</USERROLE>
        <USERROLE>MARKETING_ACTIVITY_CREATOR</USERROLE>
        <USERROLE>MARKETING_ACTIVITY_OWNER</USERROLE>
        <USERROLE>BUDGETMANAGER</USERROLE>
    </ACTIVITYUSERROLES>
</MOVEACTIVITYNOTIFICATIONS>
```

These settings are as follows:

- Access control Configuration setting: The user roles specified here denote the access required on the activity that is been moved. If the user has the following configured access on the activity been moved, the activity move is possible. The user moving the activity needs to have write access on both the source and destination parent.
- Notifications configuration setting: These are the configurations which denote to which user roles of the source parent, the activity been moved and the destination parent, the notification should be sent.

8.2.3. Configurable Notifications

NOTE: A utility for this is not been provided yet. The configuration is done manually for each tenant.

The notifications sent for various events like creation of a marketing activity, adding/removing authors etc, can be configurable. To achieve this, open the "NotificationConfiguration.xml" under <Installation Directory>/ <Tenant Name>/ StrategicPlanner / Configuration/ XML.

The notification configuration XML is as follows:

```
<NOTIFICATIONCONFIGURATION>
    <EVENT TYPE="ADD_PLAN_AUTHOR" XSLTID="5201" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
    </EVENT>
    <EVENT TYPE="ADD_PLAN_READER" XSLTID="5202" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
    </EVENT>
    <EVENT TYPE="REMOVE_PLAN_AUTHOR" XSLTID="5206" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
    </EVENT>
    <EVENT TYPE="REMOVE_PLAN_READER" XSLTID="5207" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
    </EVENT>
    <EVENT TYPE="DELETE_PLAN" XSLTID="5208" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
```

```xml
    <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
</EVENT>
<EVENT TYPE="REVIEW_PLAN" XSLTID="5216" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO"/>
</EVENT>
<EVENT TYPE="ADD_ACTIVITY_COORDINATOR" XSLTID="5203" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
</EVENT>
<EVENT TYPE="ADD_ACTIVITY_READER" XSLTID="5204" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
</EVENT>
<EVENT TYPE="ADD_ACTIVITY_BUDGETMANAGER" XSLTID="5205" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
</EVENT>
<EVENT TYPE="DELETE_ACTIVITY" XSLTID="5209" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
</EVENT>
<EVENT TYPE="REMOVE_BUDGETMANAGER" XSLTID="5210" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
</EVENT>
<EVENT TYPE="REMOVE_ACTIVITY_COORDINATOR" XSLTID="5211" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
</EVENT>
<EVENT TYPE="REMOVE_ACTIVITY_READER" XSLTID="5212" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
</EVENT>
<EVENT TYPE="REVIEW_ACTIVITY" XSLTID="5217" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO"/>
</EVENT>
<EVENT TYPE="ADD_MARKETINGOWNER" XSLTID="5218" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
</EVENT>
<EVENT TYPE="REMOVE_MARKETINGOWNER" XSLTID="5219" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
</EVENT>
<EVENT TYPE="REVIEW_BUDGET" XSLTID="5213" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
</EVENT>
<EVENT TYPE="APPROVE_BUDGET" XSLTID="5214" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETINITIATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_CREATOR</USER_ROLE>
```

```
    </EVENT>
    <EVENT TYPE="REJECT_BUDGET" XSLTID="5215" NOTIFICATIONREQUIRED="TRUE">
        <USER_ROLE TYPE="TO">BUDGETINITIATOR</USER_ROLE>
        <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
        <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
        <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
        <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_CREATOR</USER_ROLE>
    </EVENT>
    <SENDEREQUALTORECEIVER_NOTIFYSENDER>TRUE
    </SENDEREQUALTORECEIVER_NOTIFYSENDER>
</NOTIFICATIONCONFIGURATION>
```

For configuring whether the notification should be received or not for a particular event, set the value to TRUE or FALSE in the attribute NOTIFICATIONREQUIRED.

The node SENDEREQUALTORECEIVER_NOTIFYSENDER indicates whether the notification should be sent if the sender is equal to the receiver.

8.2.4. Report configurations

The reports have a few more configurations under the <REPORTCONFIGURATION> node.

- REPORTTOTALSFORCOSTCENTERGROUPINGREQUIRED:
  In few of the reports the data is grouped by the cost center. If an activity has more than one cost center, this activity is going to be repeated for each cost center. In this case, the reports total will include the activity amount more than once, which gives an incorrect amount. The reports total in this case can be hidden. This is possible using the setting REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED set to False. . The default is FALSE.

- REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED:
  In few of the reports the data is grouped by the financial account. If an invoice has more than one cost categories (in turn associated with a financial account), this invoice is going to be repeated for each financial account. In this case, the reports total will include the invoice amount more than once, which gives an incorrect amount. The reports total in this case can be hidden. This is possible using the setting REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED set to False. . The default is FALSE.

- SHOWCURRENCYINREPORTS:
  There might be a case where only one currency is used for all the plans, programs, commitments, invoices, etc. In this case, the currency need not be shown in the reports. Making the SHOWCURRENCYINREPORTS setting to false can hide this. The default is TRUE.

9. Offer Management Admin

9.1. Overview

The Offer Management Admin can be used to set up Offer Types and access control for Offers. The color configuration for the offers calendar also can be set here.

9.2. Getting Started

Click on the '**Offer Management Admin**' link on the left pane under the administration menu. A settings screen is displayed. Click on the '**Edit**' button to modify the offer setting and access control. Under the Offer Management Admin the following links are available:

1. **Settings** – The following settings can be done:
    a. **Allow auto generation of Offer Code** – If yes then the offer code will be automatically generated by the system, else it needs to be entered manually.
    b. **Allow Change Management** – If yes then the audit history for the offers will be available for the end user to view.
    c. **Configure Offer Types** – Offer types can be configured by clicking on the '**Click here to configure**' link. Values need to be added for this named hierarchy.
    d. **Offer Manager Group Access** – If yes then specify the groups which belong to the '**Offer Manager Group**' by clicking on the '**Add Group**' button. These groups have access to all the offers created in the system.

    Save the settings.

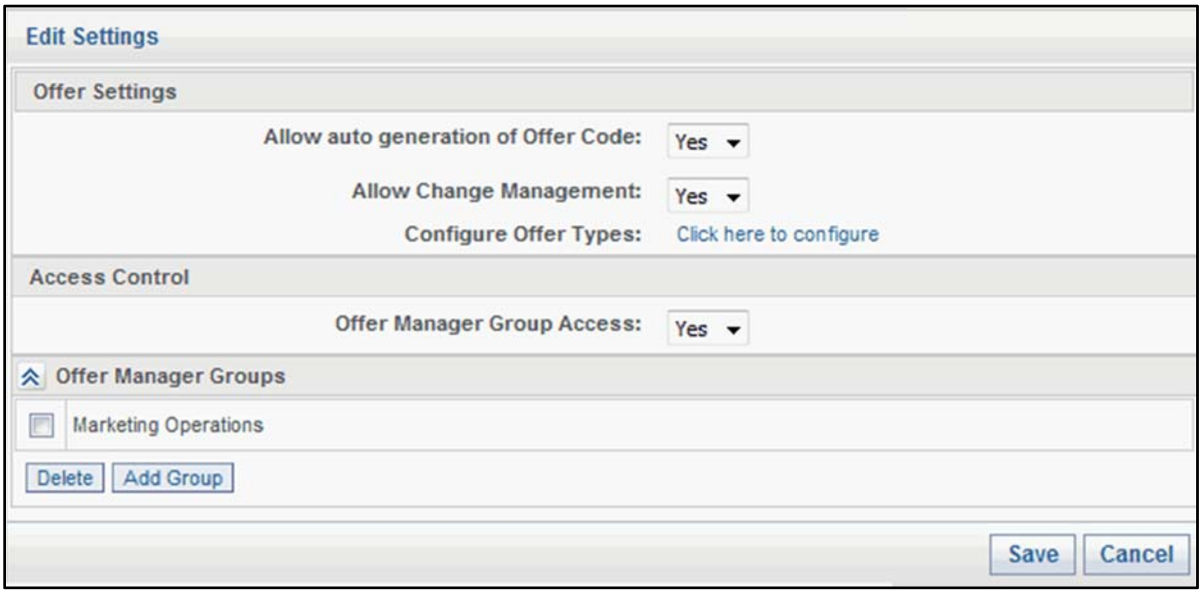


Figure No.1

2. **Offer Type Color Configuration** – Colors for each offer type can be set. Each offer type will appear in the color selected on the offer calendar. Select the offer types by clicking on the 'Select Offer Type' button. Go to each offer and click on the icon to select the color.
Save the configuration.

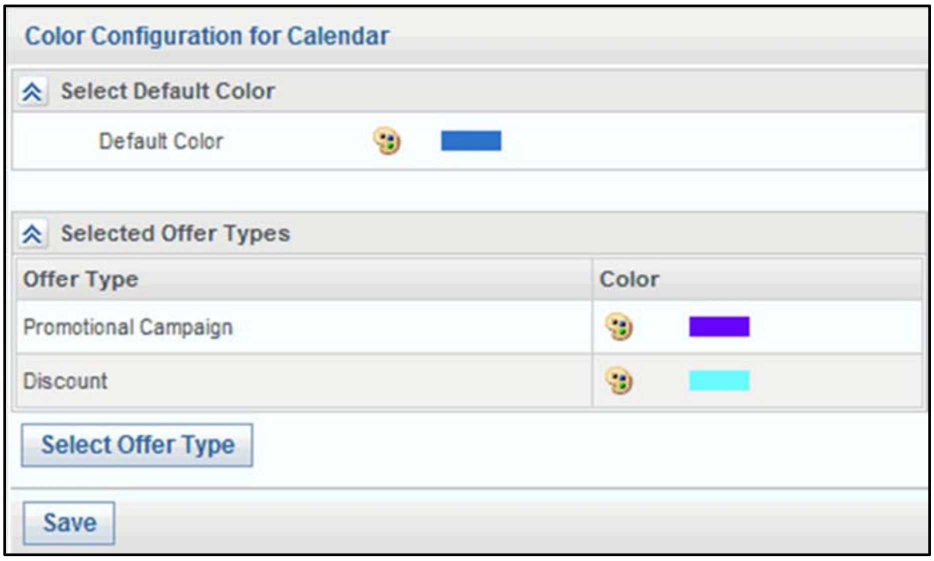


Figure No.2

10. Marketing Event Admin

10.1. Getting Started

Click on the '**Marketing Event Admin**' link on the left pane under the administration menu.

The default color and the selected marketing event types are displayed **(Figure 1)**. The default color and the marketing event type color can be edited by clicking on the icon.

Click on the '**Select Marketing Event Type**' button to select marketing event types for configuring the colors.

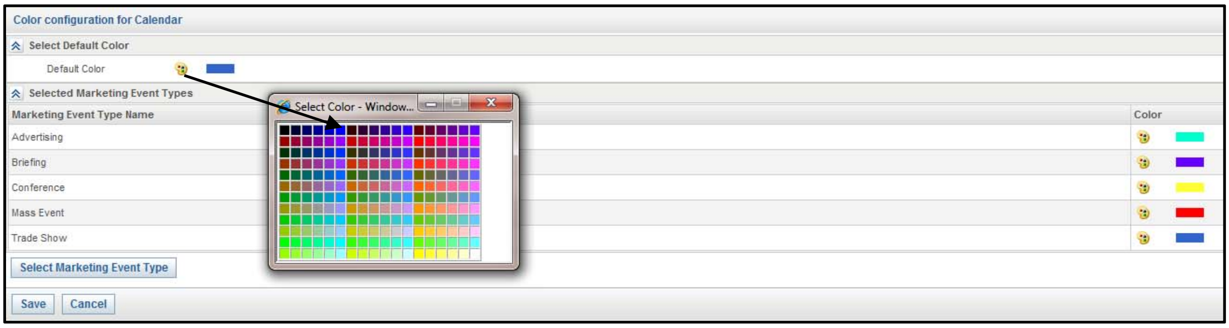


Figure No.3

These selected colors will appear on the marketing calendar.

11. Marketing Workbench

11.1. Glossary of terms used

Relevant Data Fields (RDF) – RDF's define the data that is created and used within each process instance during process execution. The data is made available to activities executed during the process and may be used to pass persistent information between activities.

Formal Parameters - Formal parameters are a sub set of relevant data fields that are defined for the process. Values for these formal parameters are passed during the invocation and the return of the control.

Actual Parameters - Actual parameters are also a sub set of relevant data fields that are defined for the process. Actual parameters are a list of parameters that can be passed to the sub-process. This is defined at the activity level.

Formal – Actual parameter mapping - The actual parameters are mapped 1:1 to the formal parameters in sequence, i.e. the first actual maps to the first formal, the second actual maps to the second formal etc.

Web Service Description Language (WSDL) – This describes web service and how to access it. The Web Services can be registered using this utility into SAS Marketing Operations Management. Only the registered web services can be accessed via Web Service Tasks.

11.2. Pre-requisites while configuring the Workbench

The following are pre-requisites while configuring the workflow process:

11.2.1. Configuring a System Vault for Workbench

Create following vaults in the DAM solution:

- **MWB Vault** - This should be a system vault. This vault is used to store the assets cataloged by the contributors in the assignment type of tasks.
  The security policy for this vault should be such that the contributors to the tasks should have access to check in files in this vault.
- **Template Vault** - This should be a system vault. This vault is used to store all the template documents uploaded by the administrator while configuring briefs and tasks for the workbench solution using the process designer utility.
  The security policy for this vault should be such that the administrators should have access to check in files in this vault.

(Please refer to the Admin Guide – DAM solution for details on creating a system vault).

11.2.2. Configuring Resource Type

There is a standard named hierarchy defined in the system called '**RESOURCETYPE**'. This named hierarchy contains all the resource types that would be used for the Workbench. The resource types can be added and modified using the Schema Designer application.

Note: Each resource type maps to a group in the system. For e.g.: If we define a new resource type in the named hierarchy called 'DESIGNERS' then the administrators also have to make sure that there is a group in the system with the same name and users can be added to this group.

(Refer to SAS Marketing Operations Management Administration Guide - Schema Designer and User/Group Management for details)

11.3. Configuring Working Days and Working Hours settings

The Working Days setting by default is set to "5 days a week" and the Working Hours setting is by default set to 8 for a tenant. The values of these settings can be modified from the Settings Utility of the tenant.

11.4. Workbench Admin

After signing in click on the '**Workbench Admin**' link provided on the dashboard screen on the left pane under '**Administration**'. A workbench settings screen is displayed **(Figure 1)**.

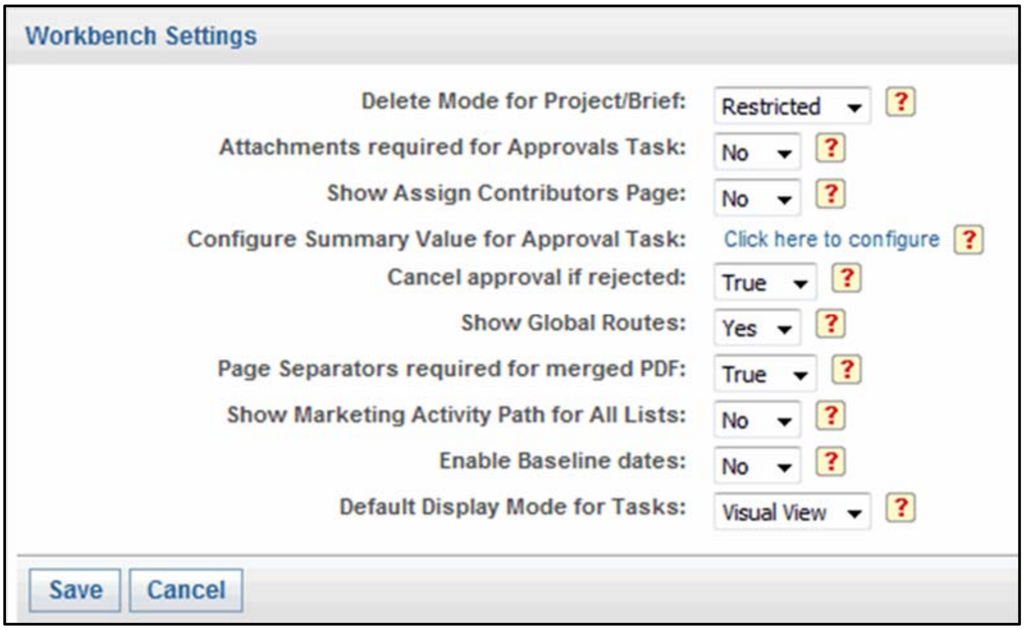


Figure No.1

The following settings can be done on this screen:

Workbench Settings		
Settings	**Expected Values**	**Explanation**
Delete Mode for Project/Brief	Authorized/Restricted	The authorized mode allows the deletion of projects/briefs with any status. The restricted mode allows deletion of the projects/briefs with the status as new or draft. **Note**: On a Production server please make sure it is in

		the restricted mode.
Attachments required for Approvals Task/Jobs	Yes/No	This setting specifies whether attachments are required for the approvals task/jobs or not.
Show Assign Contributors Page	Yes/No	This setting specifies whether to show the assign contributors page while adding new deliverables.
Configure Summary Values for Approval Task		Click the link to configure the named hierarchy values for the approval task. Refer to section 11.4.1
Cancel approval if rejected	True/False	If the setting is true, the cancel approval if rejected checkbox is by default selected in the approval task. If it is false, the checkbox is unselected by default.
Show Global Routes	Yes/No	If the setting is yes, the routes created by the admin will be visible to all users. If the setting is no, the user can view the routes created by the individual.
Page Separators required for merged PDF	True/ False	If the value is set to true then a page separator containing details of each preview file from the component list will be added in the merged PDF.
Show Marketing Activity Path for All lists	Yes/No	This determines whether the activity path for the briefs/projects created from strategic planner activities should or should not be displayed in all the lists in Workbench. The path is displayed only for briefs/projects initiated from strategic planner activities.
Enable Baseline Date	Yes/No	Whether the baseline dates i.e. the dates which the project manager sets for the start of the project. These dates may not be the actual dates the project starts.
Default Display Mode for Tasks	List View/Visual View	Visual View displays tasks in the Visual Workflow tool and List View displays tasks in the text mode Grid Layout. The admin can set the default view for the user.

To save the settings click on the '**Save**' button or to cancel click on the '**Cancel**' button.

11.4.1. Configure Summary Value in Workbench

When a job initiator routes a job the reviewer can summarize the review by adding values to the predefined summary values. These keywords or sentences can be configured through named hierarchy. To configure the summary values, follow the steps below:

1. Click on the '**Configure Summary Value**' link on the left pane or click on the '**Click here to configure**' link. The following predefined summary values are displayed **(Figure 2)**:
    a. Approved
    b. Rejected

c. Skipped

d. Cancelled

Note: Values can be configured for Approved and Rejected nodes only. Values configured under Approved will result in the job review status being approved while any value selected under the rejected node will result in the job being marked as rejected finally.

2. Select the radio button at the level at which the values need to be added to the hierarchy.
3. Click on the '**Add Value**' button which displays an add NH-Value screen.
4. Enter the name and description and click on the '**Save**' button. The new value is added to the hierarchy. The total number of values added under the root appears next to it.
5. Add in more values using the same interaction.

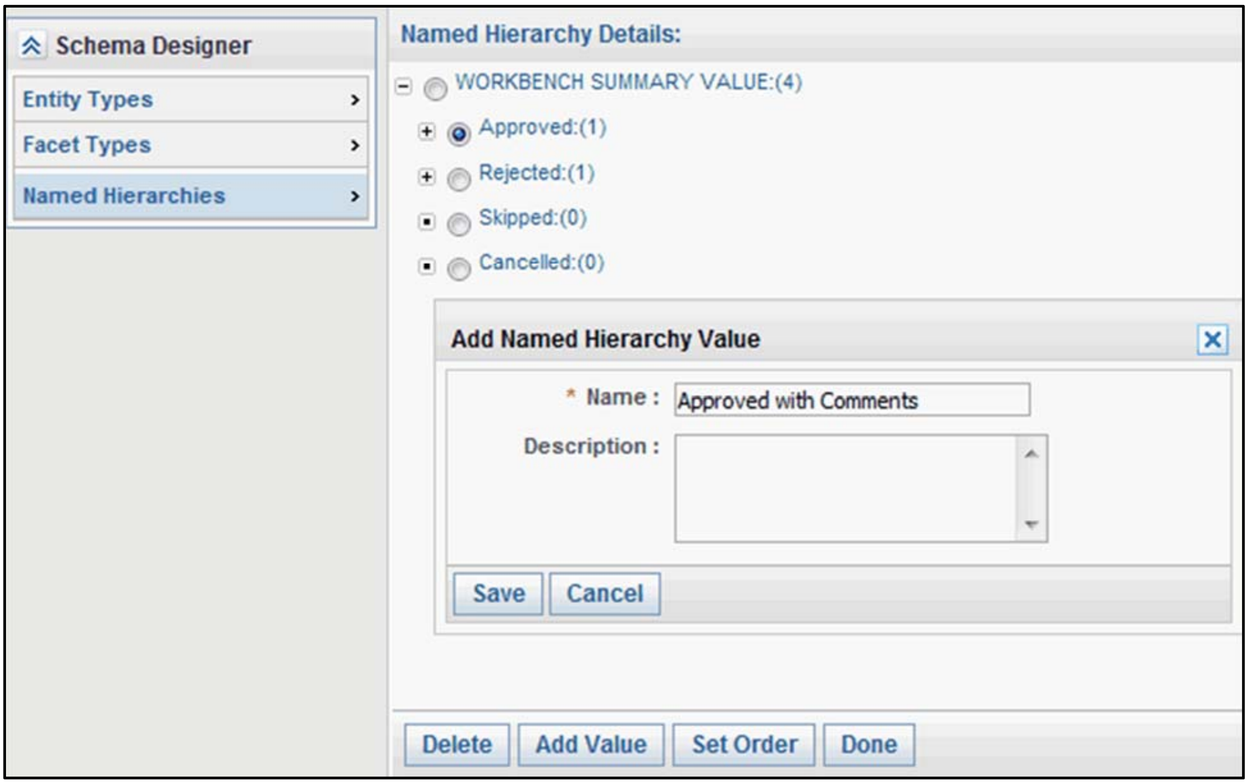


Figure No.2

11.5. Process Designer Utility

The Process designer Utility enables definition of "Process Templates" consisting of process steps, hierarchies, dependencies, data fields for each level, timelines, resource requirements and other business rules.

When the process template is modified, a new version is created. The new version of the process template is available to the end users when it is created by the administrator.

Click on the '**Process Designer**' link on the left pane under the configuration menu. The list of existing packages defined in the system and its description is displayed. When the system is new no packages are available, they need to be created by the admin for the process to be defined. These package have to be created with following names only:

1. Task Package
2. Deliverable Package
3. Process Package

These packages are created only once and all the processes can be defined within the respective packages.

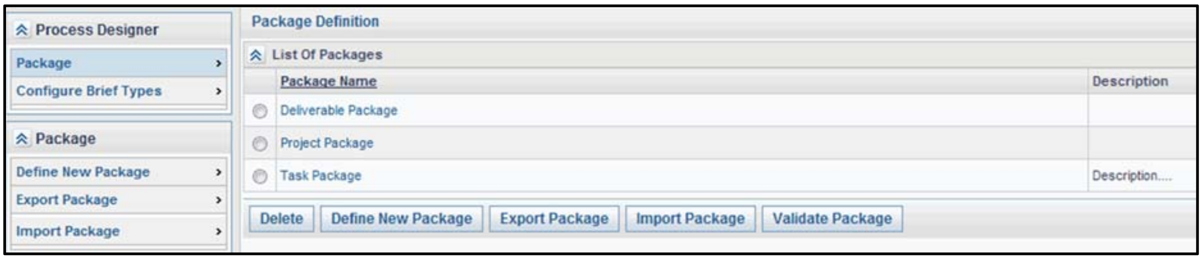


Figure No.3

The following operations can be done on this screen **(Figure 3)**:

- **Delete**: A selected package can be deleted.
- **Define New Package**: A new package can be defined.
- **Export Package**: A package can be selected and then exported. An XPDL file is displayed in a browser, which needs to be saved as a text file and then renamed with the extension .xpdl.
- **Import Package**: A package can be imported. An import package screen is displayed **(Figure 4)** where an existing XPDL file with the package definition can be browsed and uploaded.

Figure No.4

- **Validate Package**: The package can be validated.

Notes:

1. When we import/export XPDL files into a system, the following order must be followed to import them (It works only if done in this order):
   a. Task Package
   b. Deliverable Package
   c. Project Package
2. While importing/exporting the packages the associated facets do not get imported/exported. If the associated groups and resource type do not exist in the system where the packages are imported then the system creates them but the associated facets needs to be created in the new system.
3. The Brief Types have to be created after the tasks, deliverable and project has been defined.

11.6. Configuring Task Types

Task types can be configured from the process designer utility. A package needs to be created with the name '**Task Package**'. If the package is present then new processes can be added to it by clicking on the package name link. All the processes defined in this package will be treated as task types by the workbench solution.

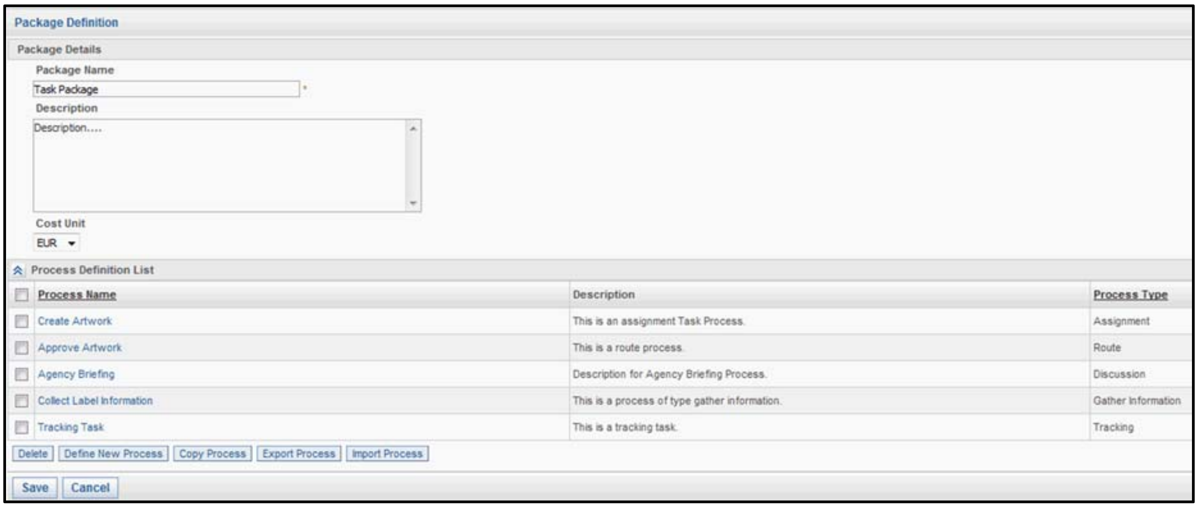


Figure No.5

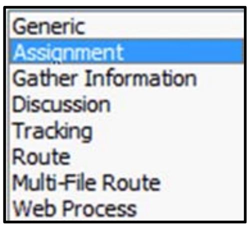
On the package details screen the following operations can be done **(Figure 5)**:

- **Delete**: Processes can be selected and deleted if the process selected for deletion is not referred to by any activity in other processes. Else, it gives an alert saying that the process cannot be deleted because it is referred to by other activities.
- **Define New Process**: A new process can be defined. See section 8.6.1 for more details.
- **Copy Process**: A copy of existing processes can be made.
- **Export Process**: Selected processes can be exported.
- **Import Process**: Selected processes can be imported in the form of an XPDL file with the process definition.

11.6.1. Define a New Process

Click on the '**Define New Process**' button or the link on the left pane **(Figure 3)**.

There are 8 types of processes. Select the '**Process Type**' from the drop down box:

	**Generic** – This type of process is defined for a deliverable and a project package.
	Assignment – For an assignment type of task.
	Gather Information – For gather information type of task.
	Discussion – For a discussion type of task.
	Tracking – For a tracking type of task.
	Route – For a route type of task.
	Multi-File Route – For a multi-file route type of task.
	Web Process – For a web service type of task.

Enter the following details which are common to all the task types:

Attribute Name	Description	Values
Process Definition Name and Description		User defined title and description
Duration	The task process can have a default duration configured. This is mainly used for tasks which have no activities configured such as 'Route', 'Multi-Route', 'Discussion' and 'Tracking' tasks. For the Marketing Workbench only the day part of the duration is used. If duration is not entered by default a 1-day duration is specified while instantiating the process.	Should be entered in days: hours: minute format.
Version Number	The version number of the process.	User defined
Current Version	There can be multiple versions of a process definition. Process Definition which has Current Version set to YES is instantiated in Workbench.	Yes/No
Finish Mode	The finish mode has to be set to **automatic** so that a task process should be automatically marked as complete when all the activities (steps) in it are completed or cancelled	**Automatic**
View Project & Deliverable Info	If the setting is set to 'True' the project and deliverable details will be visible to the contributor in a read-only format. This setting is available on the Process definition screen for the discussion, route, multi-file, tracking and Web services type of tasks.	True/False. By default it is set to 'False'.
Offset	If the task is an automatic task and the predecessor is the start activity for the task then the offset could be set. This is the number of days after which the task should start after the creation of the deliverable.	Number of days
Additional Facets	For additional information to be displayed for a task or to transfer information from the task to the deliverable or vice versa configure additional facets. To view the facets in the drop down list of the additional facets first create the facet type using Schema Designer and then associate this facet to the 'WORKFLOWPROCESS' entity type. See section 11.11.4 on associating a facet with an entity. Once the facet is selected it will be displayed in the 'Selected Additional Facets' section. To change the display of these fields on the details screens of the tasks, the administrator can configure the fields on the form using the UI Framework utility.	Select from the drop down list.

Form List	This section is visible only if a facet has been selected. Click on the '**Create Form**' button. After the forms are created a '**Refresh Form**' button is visible. If the '**Refresh Form**' The forms with the fields from the selected facets are displayed here. Click on the form name link to edit the form. For all the task types except the web process task the form for the component facet can be edited. The buttons which should be visible to the task initiator can be edited. See Section 11.9 for configuring the buttons.	When a facet is added the form needs to be created or if any changes are made to the facet list then the form needs to be refreshed.
Relevant Data Fields	This is the data that is created and used within each process instance during process execution. The data is made available to activities executed during the process and may be used to pass persistent information between the process and the parent process or vice versa**.** The data from the facets fields can be transferred to the deliverable or vice versa.	Select the formal parameters for the values displayed. The mode can be: **In** – When data comes in from the parent process **Out** – When data is going out to the parent process **Inout** – When data comes in and then is sent back out to the parent process.
Component Facet	A facet which is created in schema designer and associated with the 'WORKFLOWPROCESS' Entity and selected at the task level then the form will appear in read-only format to the Contributor and editable to the task initiator. Component facet is not supported for the Web Process type of task.	Select a facet from the drop down list.
Participant List	Select the participants required for the task. This list of participants will be used in selecting performers for the steps.	Values from the RESOURCETYPE named hierarchy.
Visual Workflow	The steps can be defined by launching the visual workflow. The participants can be added here.	
Send Notifications on Process Completion to: Users & Groups	Notifications can be sent to users/groups on completion of the task. The users/groups can be selected while configuring a task type. This can be done for all task types.	
Process Readers : Users & Groups	There are critical stakeholders in the organization who would like to have visibility into the tasks for a certain deliverable. Users/groups can be included as 'Readers'. Every instance of this type of task will automatically include the selected set of Readers	

Notification settings for Process	As a Project Manager, you can choose to send reminders to the stakeholders for a Task, "n" days before they are due to begin. You can prepare and setup your Tasks much before the actual start date and notify/remind the stakeholders just before action time.	
Activity Definition List	The activities defined in the visual workflow can be viewed here. By clicking on the 'Activity Definition name' the activity details can be edited as well as facets can be associated with the activity.	

The version history will be displayed and the template documents can be added by clicking on the '**Add**' button. To save the process click on the '**Save**' button, to validate the process click on the '**Validate Process**', to get a Gantt chart view click on the '**Gantt Chart View**' button.

11.6.2. Configuring an Assignment Task

When a particular task for a deliverable needs to be assigned to a user, an '**Assignment**' type of task needs to be configured. For configuring an assignment type of task follow the steps below:

- To create a new process select the task type as assignment and follow all the steps in **section 11.6.1**.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the '**How to define activities of type Step**' section.

In an assignment type of task, if there are more than one steps, they need to be sequential i.e. the steps have to be done one after the other.

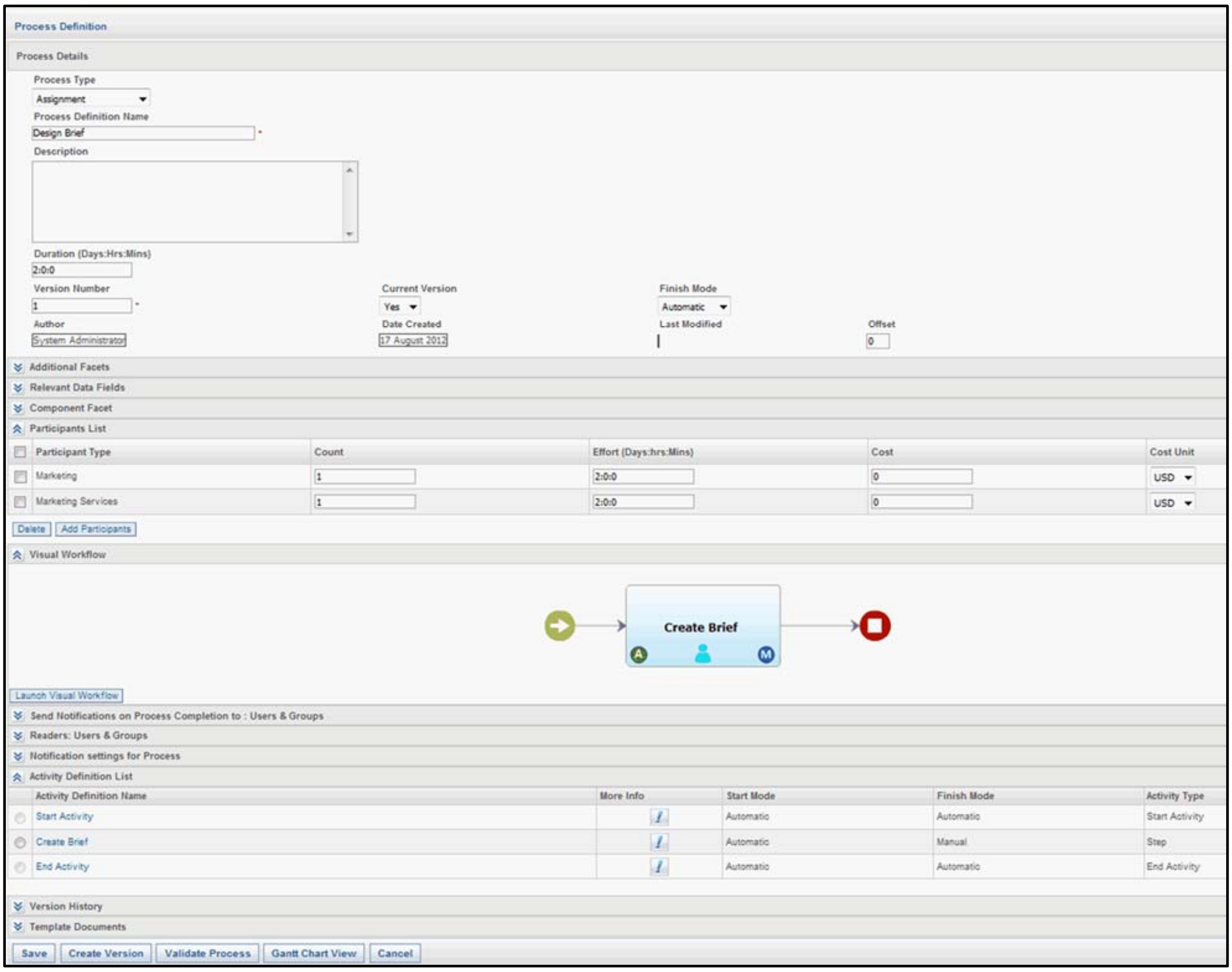


Figure No.6

11.6.3. Configuring a Gather Information Task

When information needs to be gathered for a deliverable, a 'Gather Information' type of task can be configured. For configuring a gather information type of task follow the steps below:

- To create a new process select the task type as gather information and follow all the steps in **section 11.6.1**.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the '**How to define activities of type Step**' section.

In a gather information type of task, if there are more than one steps, they need to be simultaneous i.e. all the steps have to be done together.

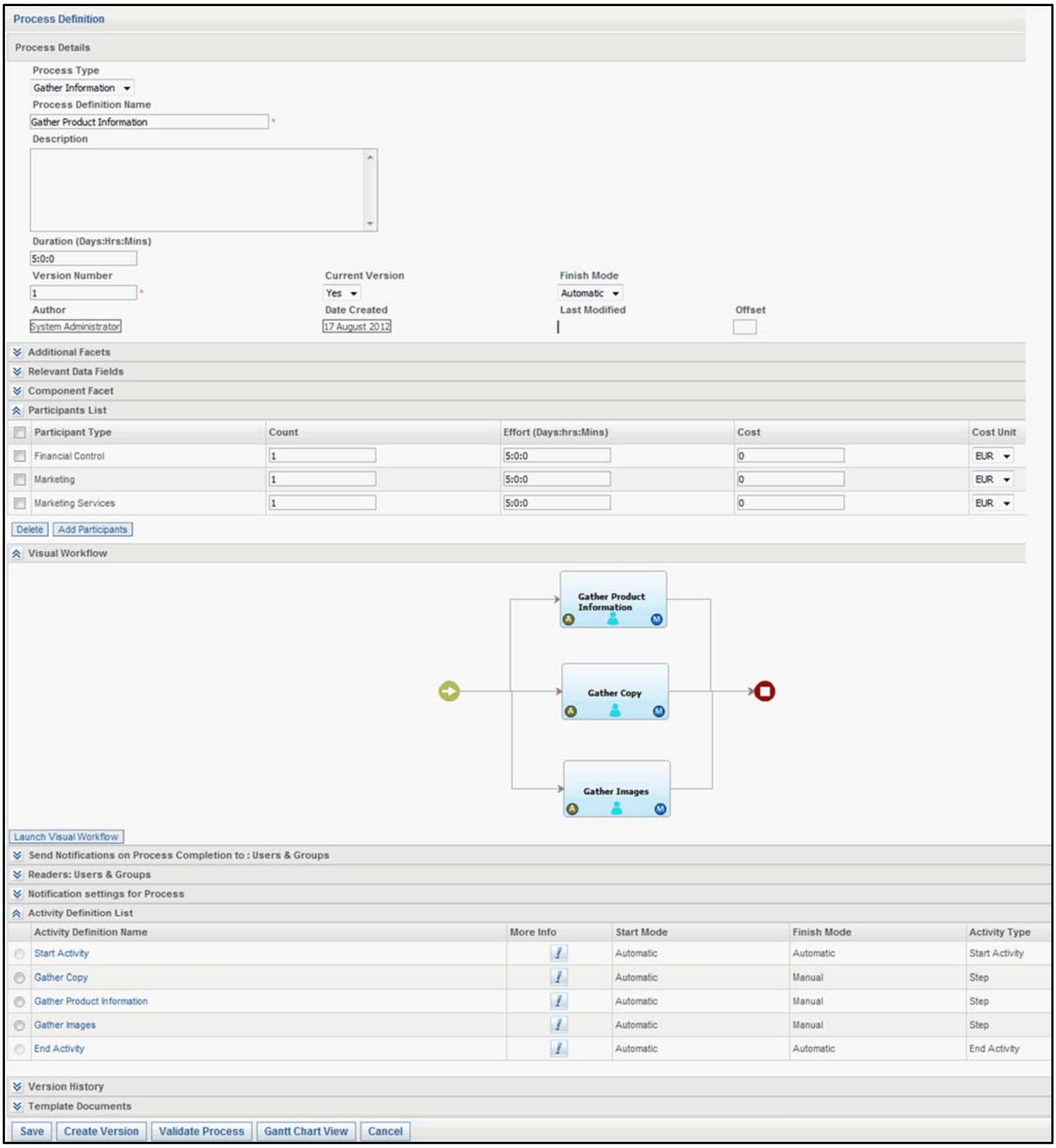


Figure No.7

11.6.4. Configuring a Discussion Task

A discussion task is configured when a discussion needs to be started. For configuring a discussion type of task follow the steps below:

- To create a new process select the task type as discussion and follow all the steps in section 11.6.1.

- No activities need to be defined for a discussion type of task.

Note: No participants need to be selected for this type of task and no steps need to be created.

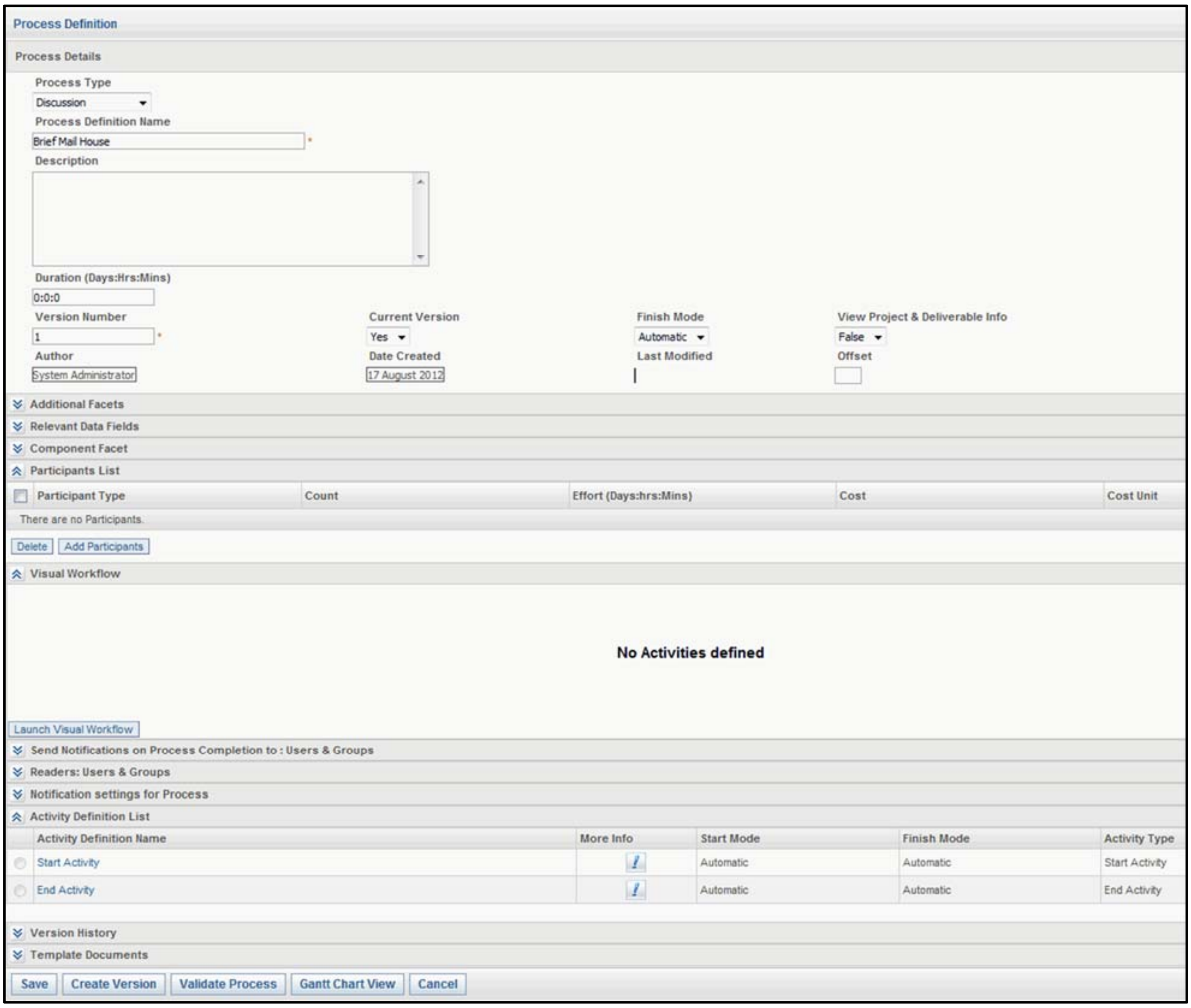


Figure No.8

11.6.5. Configuring a Tracking Task

A tracking task is a manual task. When the initiator wants to track all the activities done in a particular task a tracking task is created. Following the steps below:

- To create a new process select the task type as tracking and follow all the steps in section 11.6.1.
- No activities need to be defined for a discussion type of task.

Note: No participants need to be selected for this type of task and no steps need to be created.

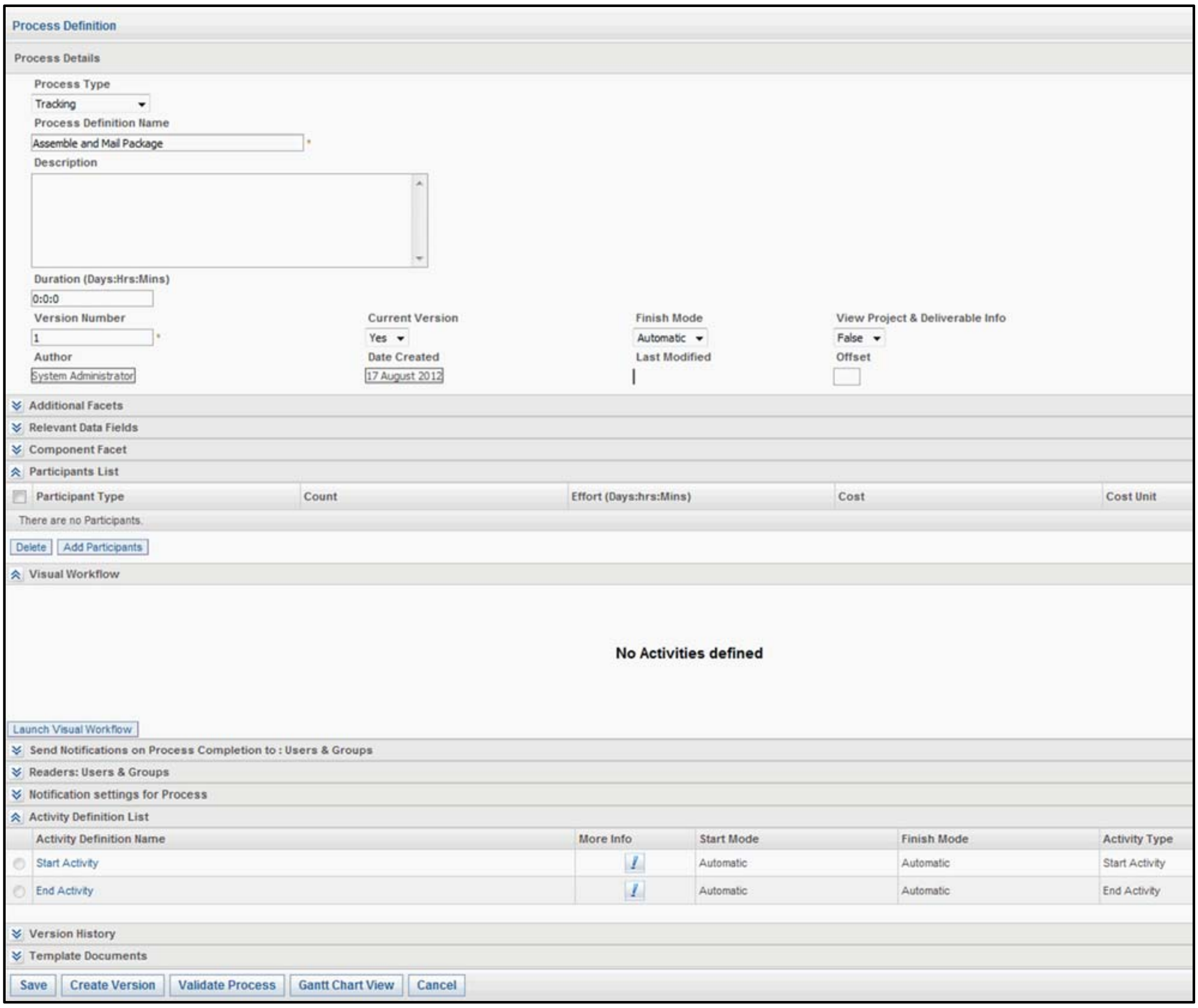


Figure No.9

11.6.6. Configuring a Route Task

A route task is configured when files need to be routed out for approval. To configure a route type of task follow the steps below:

- To create a new process select the task type as route and follow all the steps in **section 11.6.1**.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the '**How to define activities of type Step**' section.

  If a step/activity is added to a route task the participants need to be selected.

  -

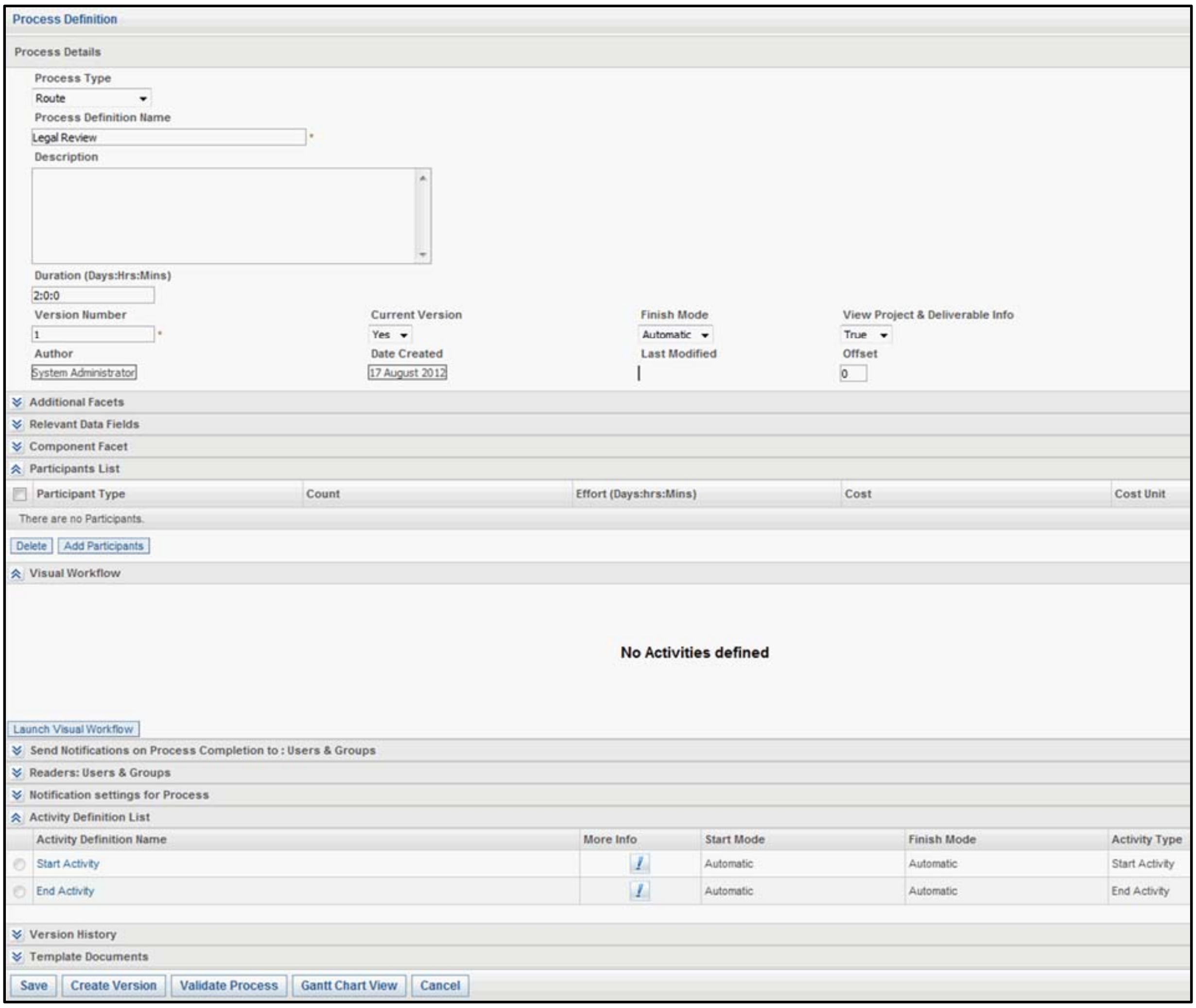


Figure No.10

11.6.7. Configuring a Multi-File Route Task

A multi-file route task is configured when multiple files need to be routed in a single task for approval. To configure a multi-file route task follow the steps below:

- To create a new process select the task type as multi-file route and follow all the steps in **section 11.6.1**.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the '**How to define activities of type Step**' section.

  If a step/activity is added to a route task the participants need to be selected.

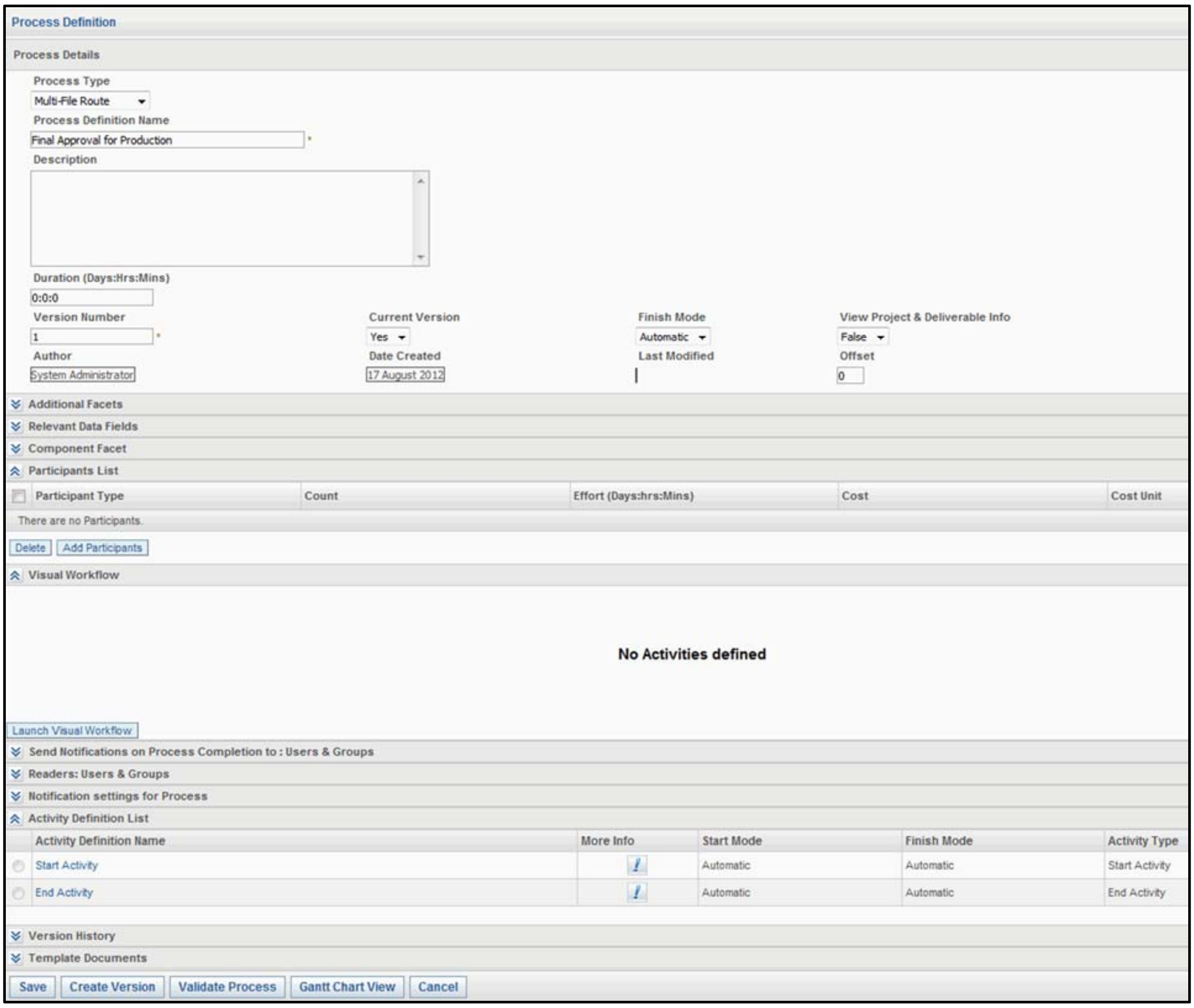


Figure No.11

11.6.8. Configuring a Web Process Task

A Web Services Task provides support in process designer to configure activities to use services (web services) of external applications. To configure a web services type of task follow the steps are below:

- To create a new process select the task type as web process and follow all the steps in section 11.6.1.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the 'Define a new activity for a Web Services Task' section.
- Define the dependency between the activities in the process.

Note: For the web services type of process no participants need to be selected. If data transfer needs to done then the RDF's need to be selected.

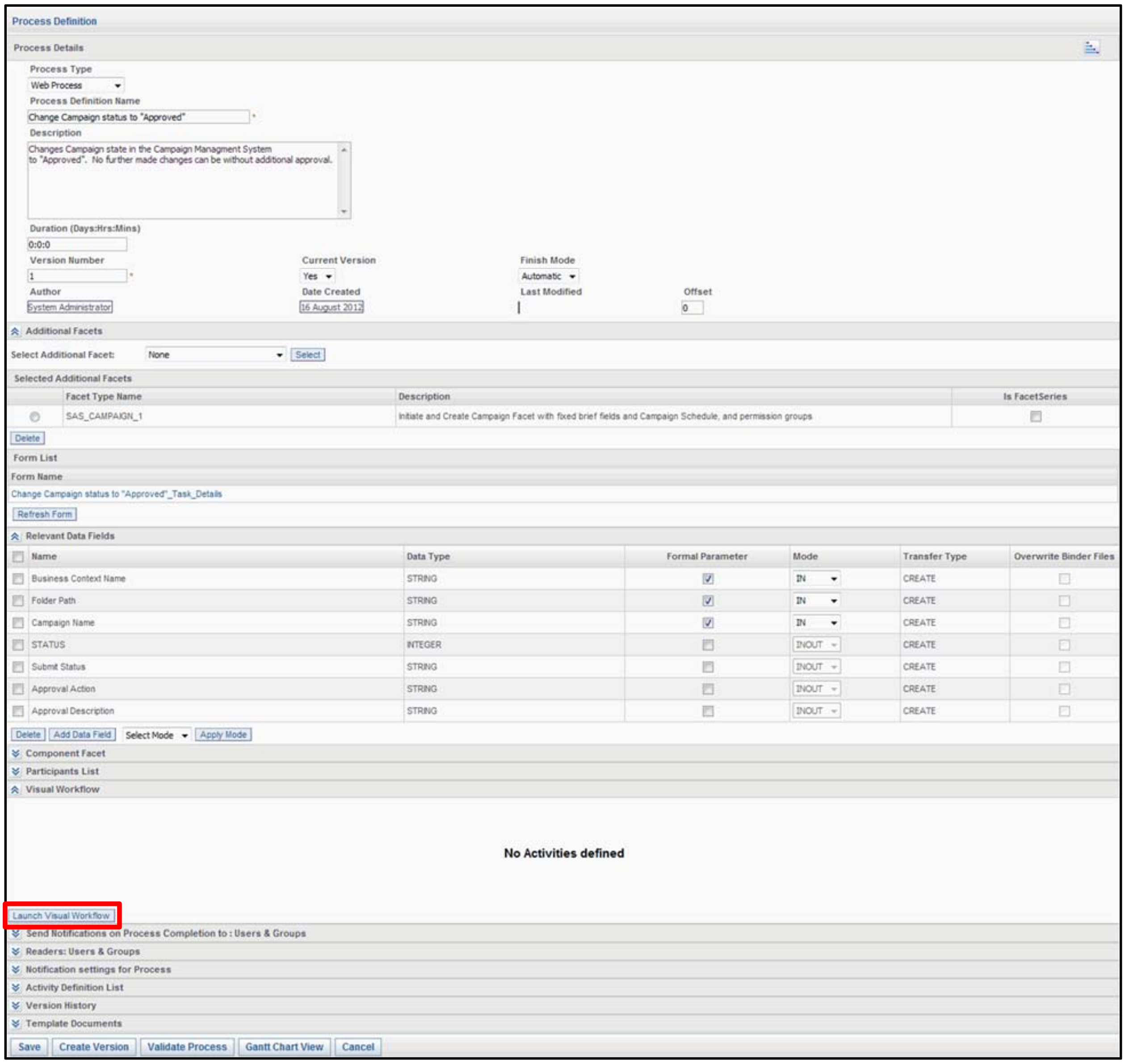


Figure No.12

Note: For a web services task the configuration can be set such that the task is auto-initiated. There is no need for any manual intervention to initiate such a task. On completion of the earlier task in the workflow, the web service task will be automatically initiated. This will however depend on the configuration. The web service tasks can be alternately configured for manual initiation too. **Finish Mode has to be Automatic.**

Define a new activity for a Web Process Task

Click on the '**Launch Visual Workflow**' button **(Figure 12)**. A visual workflow canvas is displayed where the step/activity can be defined graphically. By default the start and the end activity will be displayed **(Figure 13)**. To add a step drag and drop the 

icon onto the canvas. Set the dependencies between the activities by clicking on the arrows and arranging them accordingly.

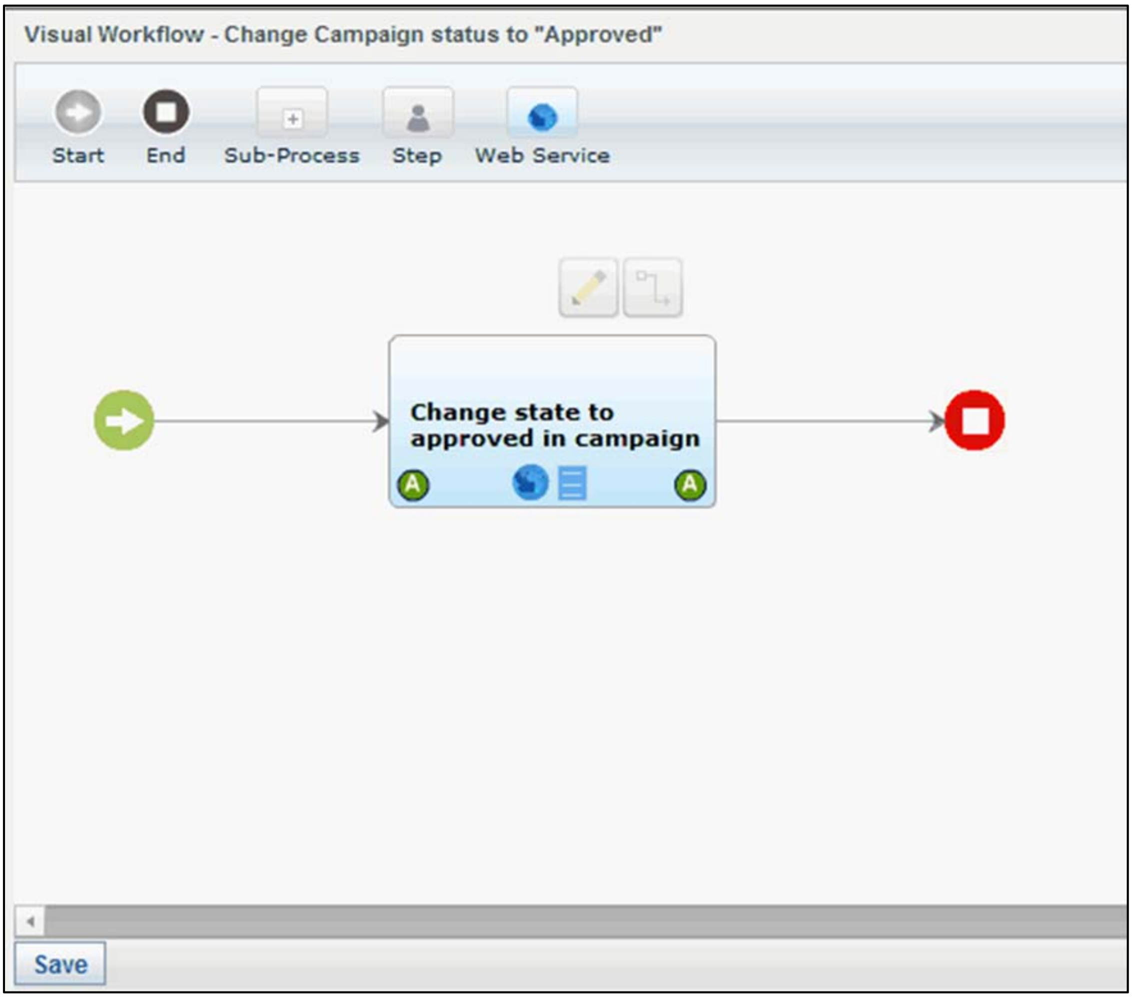


Figure No.13

Click on the  icon and enter the activity definition details **(Figure 14)** such as:

Attribute Name	Description	Values
Activity definition name and description		<User defined title>
Duration	For workbench we use only the day's part of the duration. If duration is not entered by default 2 days duration is put while instantiating the activity.	Should be entered in the days:hours:minute format.
Start Mode		Automatic
Finish Mode		Automatic

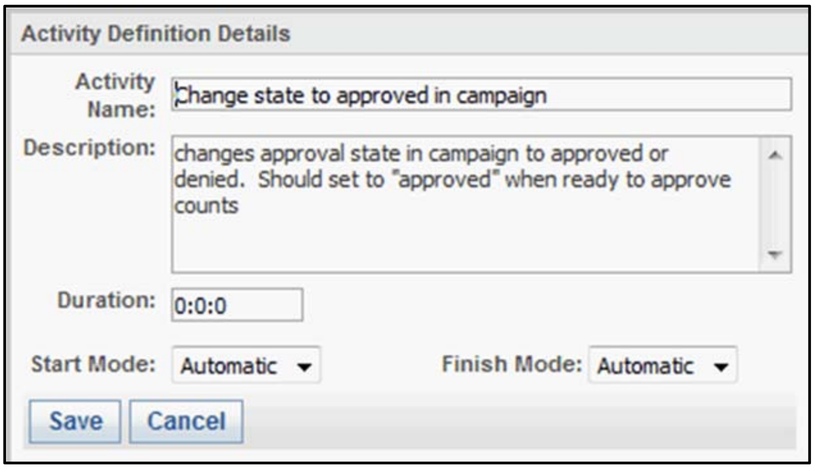


Figure No.14

Click on the icon and select the Web method from a configured list **(Figure 15)**.

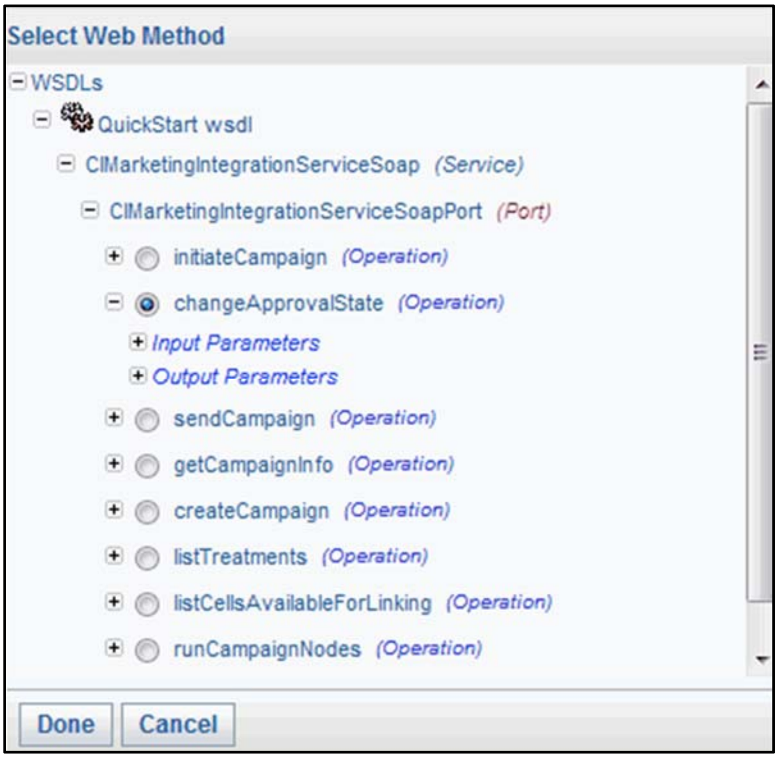
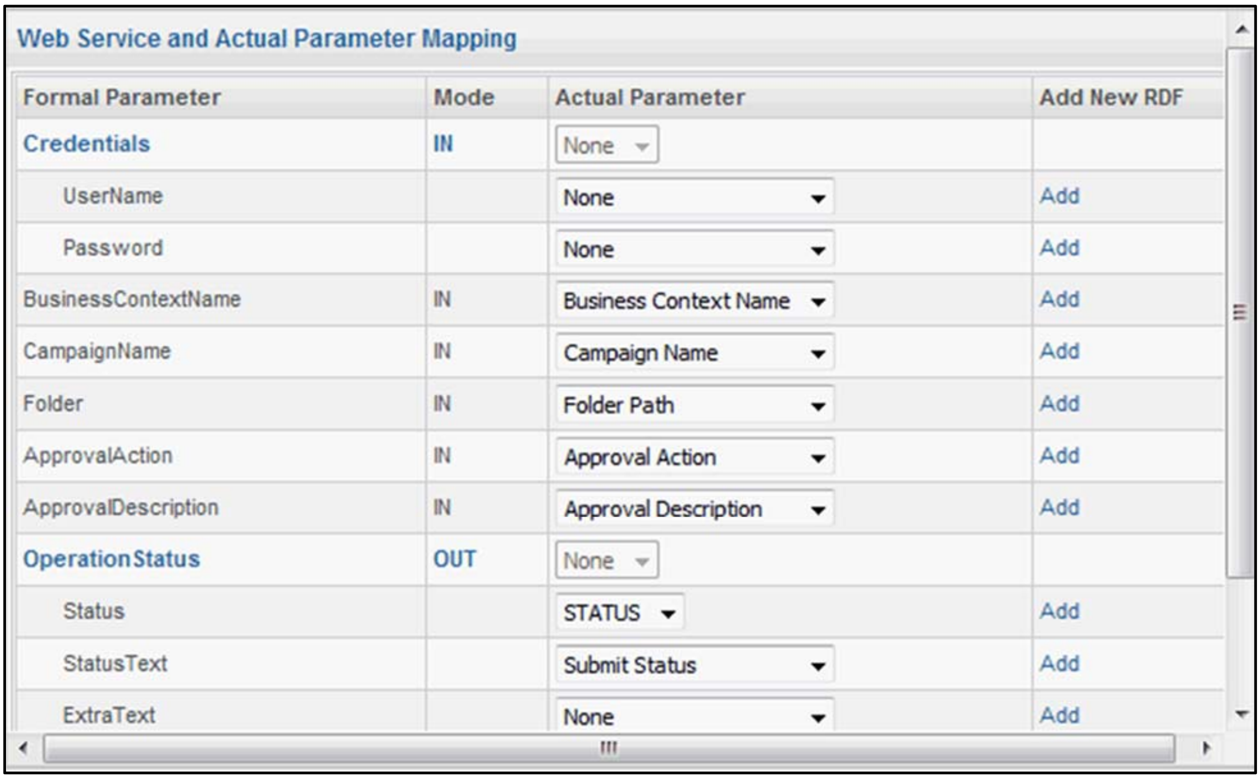


Figure No.15

Click on the icon and do the Web service (formal parameter) and actual parameter mapping **(Figure 16)**.



Web Service and Actual Parameter Mapping

Formal Parameter	Mode	Actual Parameter	Add New RDF
Credentials	IN	None	
UserName		None	Add
Password		None	Add
BusinessContextName	IN	Business Context Name	Add
CampaignName	IN	Campaign Name	Add
Folder	IN	Folder Path	Add
ApprovalAction	IN	Approval Action	Add
ApprovalDescription	IN	Approval Description	Add
OperationStatus	OUT	None	
Status		STATUS	Add
StatusText		Submit Status	Add
ExtraText		None	Add

Figure No.16

11.6.9. How to define activities of type Step

To define activities follow the steps below:

1. Click on the 'Launch Visual Workflow' button to launch the visual workflow tool. A visual workflow canvas is displayed where the step/activity can be defined graphically. By default the start and the end activity will be displayed **(Figure 17)**. The canvas can be resized as well as exported as an Image or a PDF.

Figure No.17

2. To add a step drag and drop the  icon onto the canvas. Set the dependencies between the activities by clicking on the arrows and arranging them accordingly.

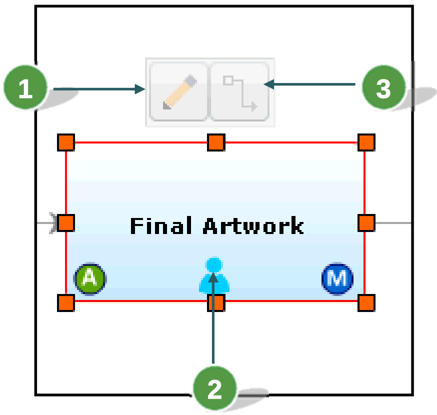


Figure No.18

3. To add the activity definition details click on **1** **(Figure 18)**. An activity definition details popup is displayed **(Figure 19)**. Enter the name, description, duration. The start mode needs to be automatic and the end to be should be manual.

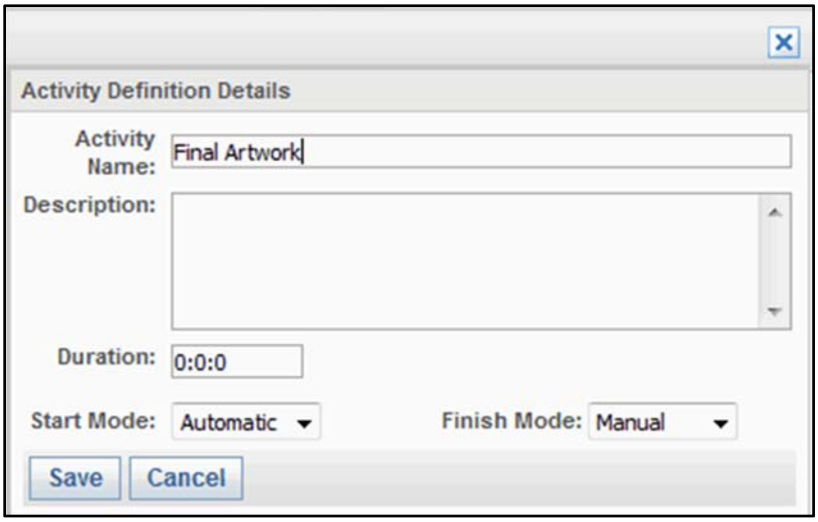


Figure No.19

4. To add the contributors click on **2** **(Figure 18)**. A performer selection popup is displayed **(Figure 20)**. Select from the participant list and click on the '**Done**' button.

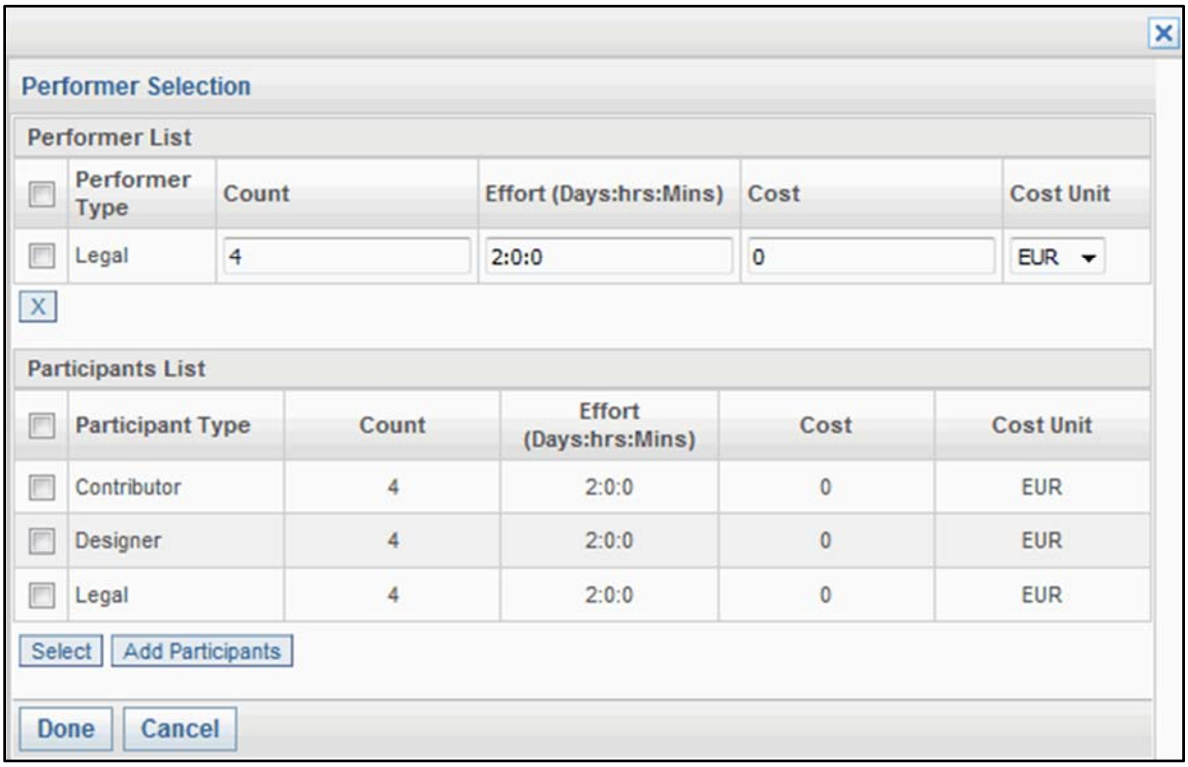


Figure No.20

5. To link the activities click on 3 **(Figure 18)**. An arrow can be dragged and linked to activities. A transition name can be provided if required.

After all the relevant information is entered save the activity definition.
The facets can be added by clicking on the activity definition name link on the process details screen.

11.7. Configuring Deliverable Types

To configure deliverable types first create a package with the name '**Deliverable Package**'. All the processes defined in this package will be treated as deliverable types by the workbench solution. To define a new process in the deliverable package click on the '**Define New Process**' button **(Figure 16)**.

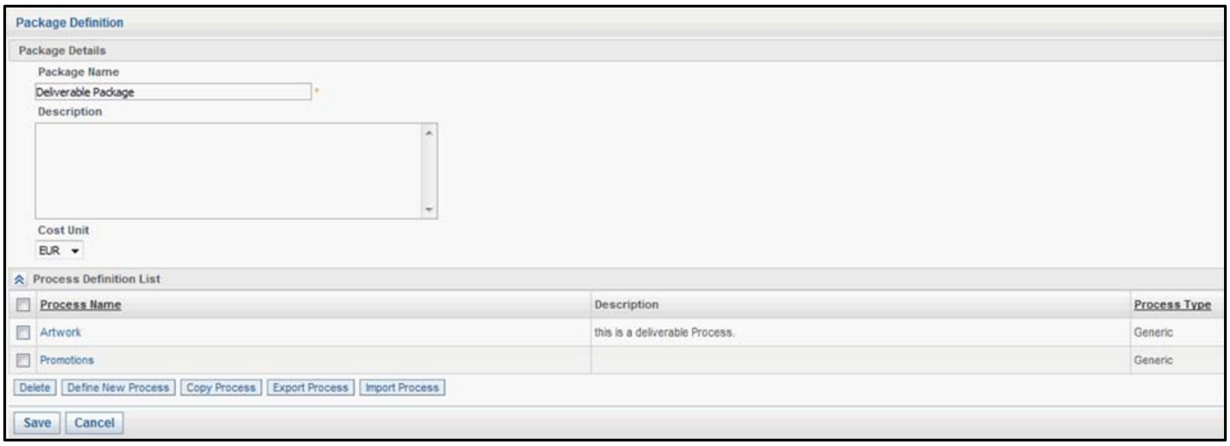


Figure No.21

To configure a process in the deliverable package follow the steps below:

- To create a new process select the task type as generic and follow all the steps in **section 11.7.1**.
- To define new activity click on the 'Launch Visual Workflow' button and refer to the '**How to define activities of type Sub Process**' section. The activities other than the start and end activity will be of type Sub Process and they all will reference to the processes defined in the Task Package.
- Set appropriate dependencies in the activities defined in the deliverable process.

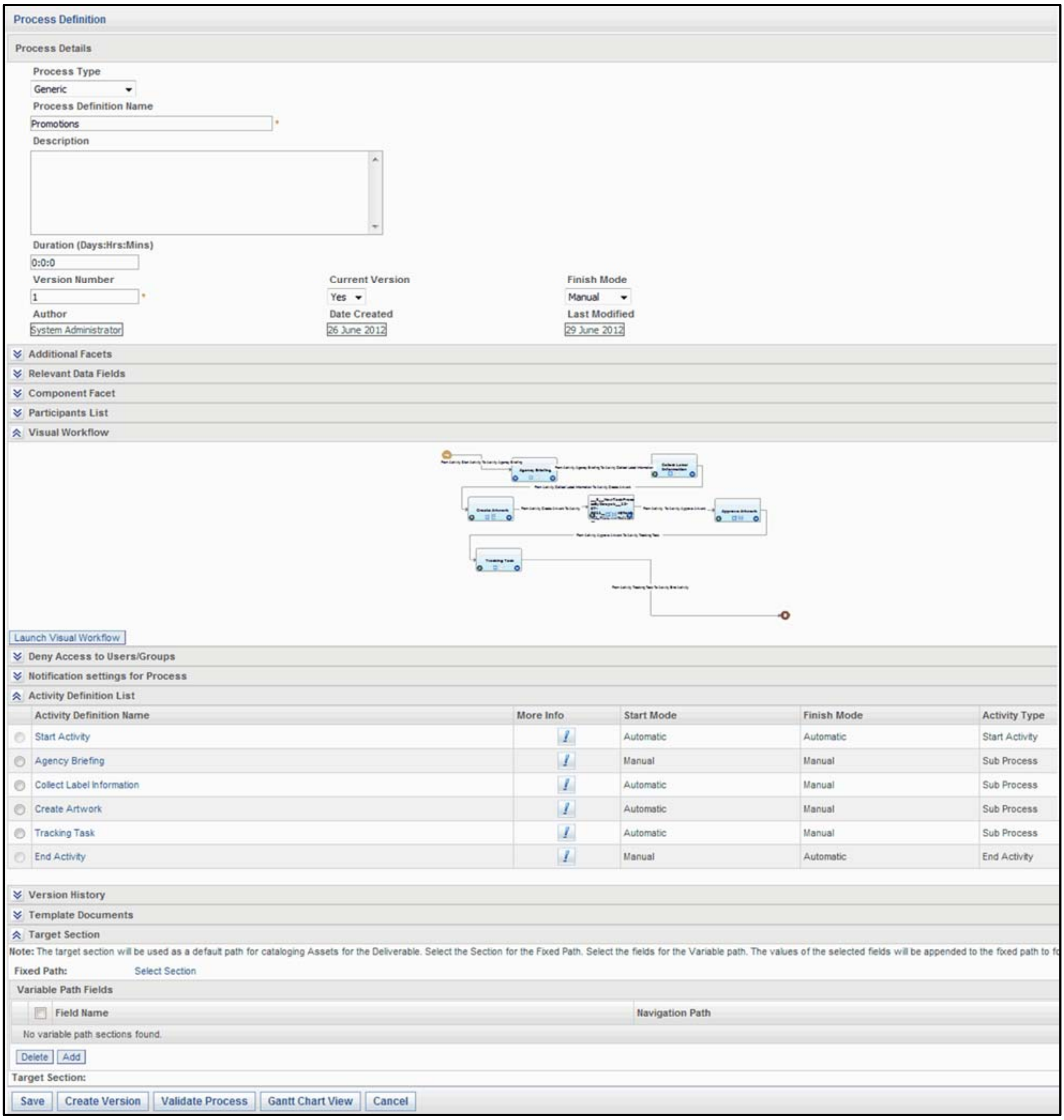


Figure No.22

11.7.1. Common Attributes of Process

Attribute Name	Description	Values
Process Type		Generic
Process Definition Name and Description		<User defined title>

Version Number	The version number of this process.	1
Current Version	There can be multiple versions of a process definition. Process Definition which has Current Version set to YES is instantiated in Workbench.	Yes/No
Finish Mode	If the deliverable is to be marked as completed or cancelled by the Project Manager then its finish mode is manual. If it is automated then it could be 'Automatic'	Manual/Automatic
Additional Facets	Configure additional facets for deliverable types if any. To view the facet types in the drop down list of additional facets first create the facet type using Schema Designer and then associate this facet to the WORKFLOWPROCESS entity type. To display these fields on the details screens of the tasks, administrator will have to configure the fields on the form using the UI Framework utility. See section on associating a facet with a task type in section 11.11.4. The selected facets will be displayed in the 'Selected Additional Facets' section.	Select the facets associated with the deliverable.
Relevant Data Fields	This is the data that is created and used within each process instance during process execution. The data is made available to activities executed during the process and may be used to pass persistent information between the process and the parent process or vice versa.	Select the formal parameters for the values displayed. The mode can be: In – When data comes in from the parent process Out – When data is going out to the parent process Inout – When data comes in and then is sent back out to the parent process.
Component Facet	A facet series which is created in schema designer and associated with the 'WORKFLOWPROCESS' Entity. The component facet which was selected at the task level should be selected here.	Select a facet from the drop down list.
Form List	The forms created for the selected facet will be displayed here. A search form can be created for searching for assets that are associated with the components. A deliverable form that is used when a user adds a deliverable from a brief. There are two separate deliverable forms: 1. A form when we add/edit deliverables from briefs.	

	2. A form when we add/edit deliverables from projects. The layout, validations and mandatory values for the fields on these two forms can be configured independently. See Section 8.9 for configuring the buttons.	
Unique Identifier Fields	A Unique identifier can be defined for components. This helps to identify each component in the list with a distinct name. The unique identifier can be configured using the fields from the component facet. Fields with UI Type as Edit box, Radio button and dropdown can be selected.	
Participant List	Will not be required as there will be no activity defined in the deliverable.	
Complete Access User Groups	Users/groups that will have complete access on the Projects can be configured. This can be done for all Project types. Admin can add and delete Users and Groups for the Complete Access Group.	Only for Projects.
Restricted Groups for Process	A Restricted Groups for Process section has been added. From this section, for each Project Type, Group(s) such as Project Managers Group can be added. The selection for the PM and the APM will be possible only from this group if configured.	Only for Projects.
Activity Definition List	The start and the end activities are created by default by the system whenever the user clicks on the '**Define New Process**' button. Between the start and end activities define all other activities that the process should have. Dependencies between these activities will be set as per the process types.	
Target Section	The section path where the assets will be cataloged for a deliverable can be configured. This section path has two parts: a. Fixed path: For fixed path the user can configure the vault and section where the asset should be cataloged. b. Variable path: For variable path the user can select the fields from the facets associated with the deliverable process. Fields with UI Type as Edit box, Radio button and dropdown can be selected. In Workbench the values of the fields defined for the variable path are fetched from the deliverable facet and appended this to the fixed path. This path is then used for	

	cataloging the assets in DAM.	

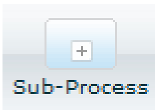
11.7.2. How to define activities of type Sub Process

Similar to the activity of type 'Step', the activity of type 'Sub Process' can also be configured using the visual workflow.

To define activities follow the steps below:

1. Click on the '**Launch Visual Workflow**' button to launch the visual workflow tool. A visual workflow canvas is displayed where the step/activity can be defined graphically. By default the start and the end activity will be displayed **(Figure 23)**. The canvas can be resized as well as exported as an Image or a PDF.

Figure No.23

2. To add a step drag and drop the 

icon onto the canvas. Set the dependencies between the activities by clicking on the arrows and arranging them accordingly.

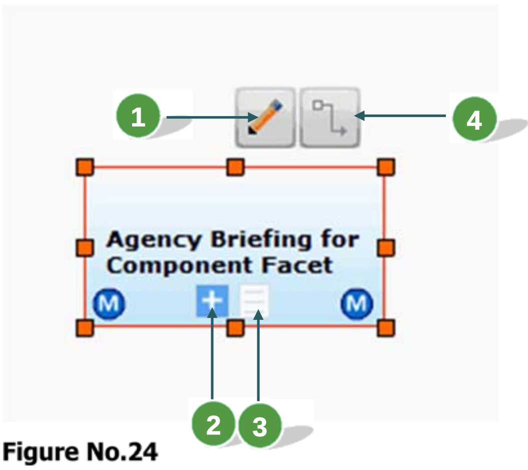


Figure No.24

3. To add the activity definition details click on 1 **(Figure 24)**. An activity definition details popup is displayed **(Figure 25)**. Enter the name, description, duration. The start mode needs to be automatic and the end to be should be manual.

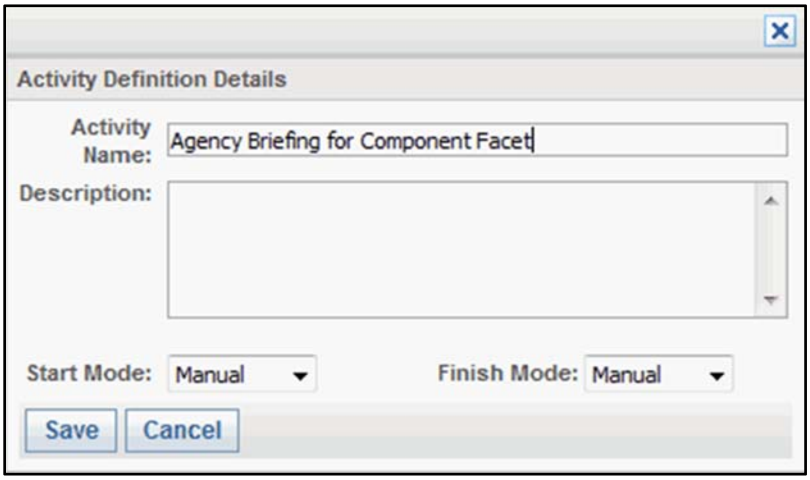


Figure No.25

To add the contributors click on 2 **(Figure 24)**. Select a task from the configured task type in the task package **(Figure 26)** for defining a Deliverable or a deliverable type from a deliverable package for a Project and click on the '**Save**' button. If a data transfer is configured the formal and the actual parameters need to mapped **(Figure 27)**, which can be done by clicking on the 3 **(Figure 24).**

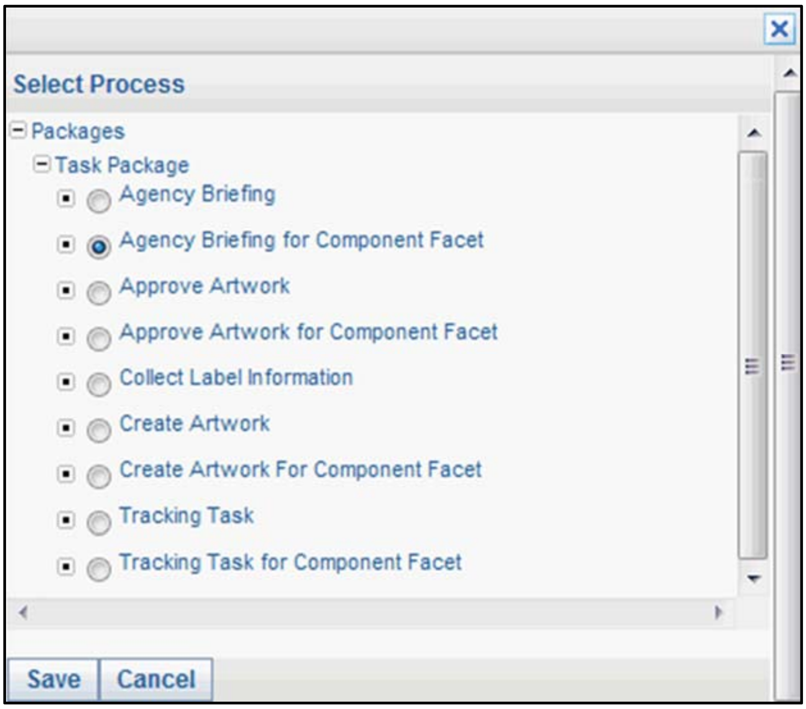


Figure No.26

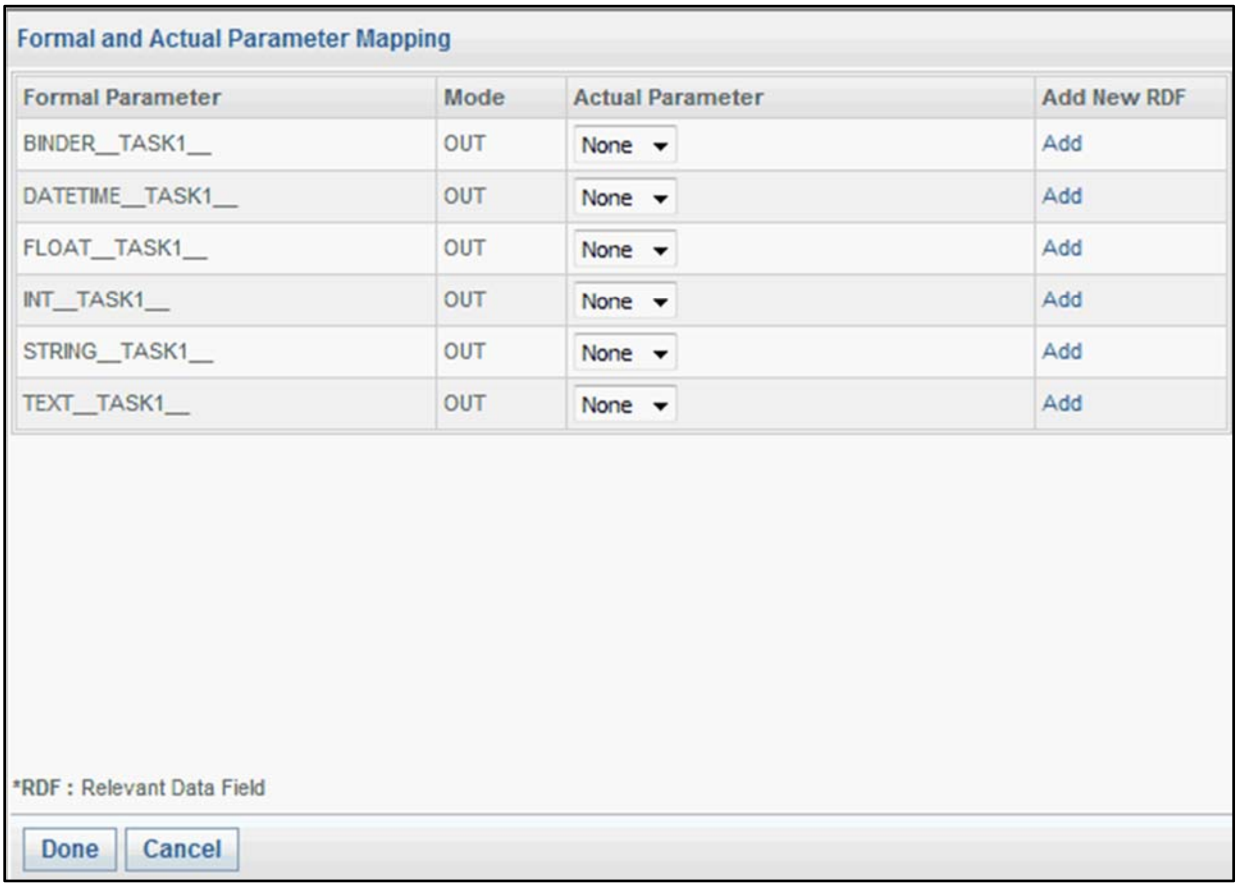


Figure No.27

After all the relevant information is entered save the activity definition.

The facets can be added by clicking on the activity definition name link on the process details screen.

Note: To auto-initiate a task the start mode needs to be set to '**Automatic**'.

11.8. Configuring Project Types

To configure project types first create a package with the name '**Project Package**'. All the processes defined in this package will be treated as project types by the workbench solution. To define a new process in the project package click on the '**Define New Process**' button **(Figure 28)**.

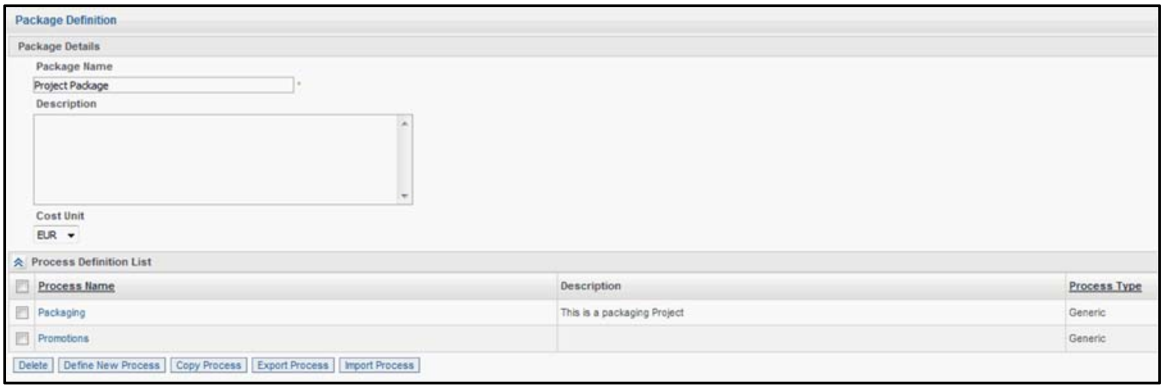


Figure No.28

To configure a process in the project package follow the steps below:

- To create a new process select the task type as generic and follow all the steps in **section 8.8.1**.
- To define new activity click on the 'Define New Activity' button and refer to the '**How to define activities of type Sub Process**' section. The activities other than the start and end activity will be of type Sub Process and they all will reference to the processes defined in the Deliverable Package.
- Set appropriate dependencies in the activities defined in the deliverable process.

Configure Additional facets for projects types. To view the facet types in the drop down list of additional facets first create the facet type using Schema Designer and then associate this facet to the WORKFLOWPROCESS entity type. To display these fields on the details screens of the project, the administrator will have to configure the fields on the form using the 'UI Framework' utility. See section on associating a facet with a project type in section 11.11.2.

11.9. Buttons configuration for Components

Screen	Buttons (Display Text)	Buttons (Name)	Comments
Read Only Deliverable Details Screen	Edit	EditSeriesRecord	'Edit' and 'Select' buttons cannot come at the same time for the same component list on the same form. Edit/Select buttons should be configured such that they are not visible for the Read-only forms.
	Initial Lock	InitialLockSeriesRecord	
	Final Lock	FinalLockSeriesRecord	
	Unlock	UnLockSeriesRecord	
	Batch Download	BatchDownloadDigitalAssets	
	Export		
Task Level	Edit		
	Batch Download	BatchDownloadDigitalAssets	
	Export		
	Select	SelectSeriesRecord	
Activity Level	Edit		
	Batch Download	BatchDownloadDigitalAssets	
	Export		
	Select	SelectSeriesRecord	
Brief Deliverable	Edit		

	Batch Download	BatchDownloadDigitalAssets	Export and Batch Download buttons should be configured such that they are visible for the Read-only forms.
	Export		
Edit Records	Delete		
	Add		
	Copy		
	Export		
	Import		
	Batch Upload	BatchUploadDigitalAssets	
	Batch Download	BatchDownloadDigitalAssets	
	Save	SaveSeriesRecord	

11.10. Configuring Brief Types

Click on the '**Configure Brief Types**' link on the left pane **(Figure 29)** to configure new brief types.

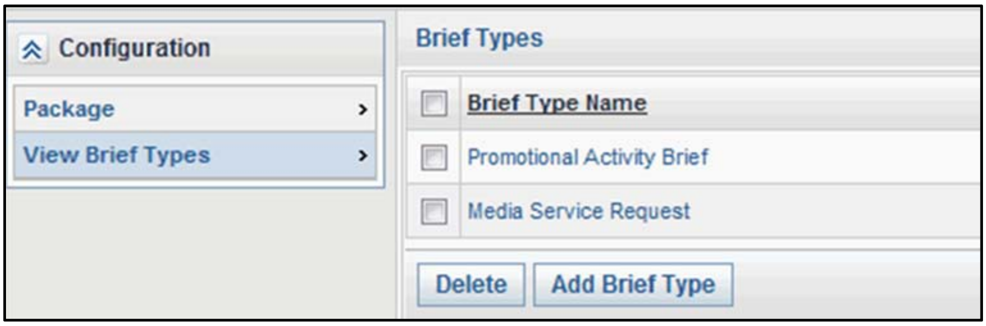


Figure No.29

A list of existing brief types is displayed to the right of the screen. To add a new brief type, click on '**Add Brief Type**' button at the bottom of the screen **(Figure 29)**.

Following information should be entered to setup brief types **(Figure 30)**:

Brief Information:

- **Brief Type Name** – The name for the brief type.
- **Brief Assigned To** - Select whether the brief should be assigned to an individual or a group. If the group option is selected then the groups need to be selected.
- **Project Manager Selection** – Project managers can be selected in two ways, either from a list of all user of the system or the selection can be restricted to certain groups. This group is configured by the admin while creating a project type.
- **Select default Project Type** - Select the default project type that should be displayed on the brief details screen.
- **Select additional facets** – Select the additional facets that should be created and associated when the brief instance is created from this brief type. To view the facet types in the drop down list of additional facets first create the facet type using 'Schema Designer' and then associate this

facet to the 'BRIEF' entity type. To display these fields on the details screens of the brief, administrator will have to configure the fields on the form using the 'UI Framework' utility. Refer to the section 8.12.1.

- **Selected Additional facets** - The selected facets are displayed here.
- **Readers: Users and Groups** – Default readers can be selected. These readers are populated when this brief type is created.
- **Template Documents** - The templates documents can be added by clicking on the 'Add' button.

To save the brief type, click on the '**Save**' button or to cancel the operation, click on the '**Cancel**' button.

To view/edit the details of the brief type, click on the brief type name link in the brief types list.

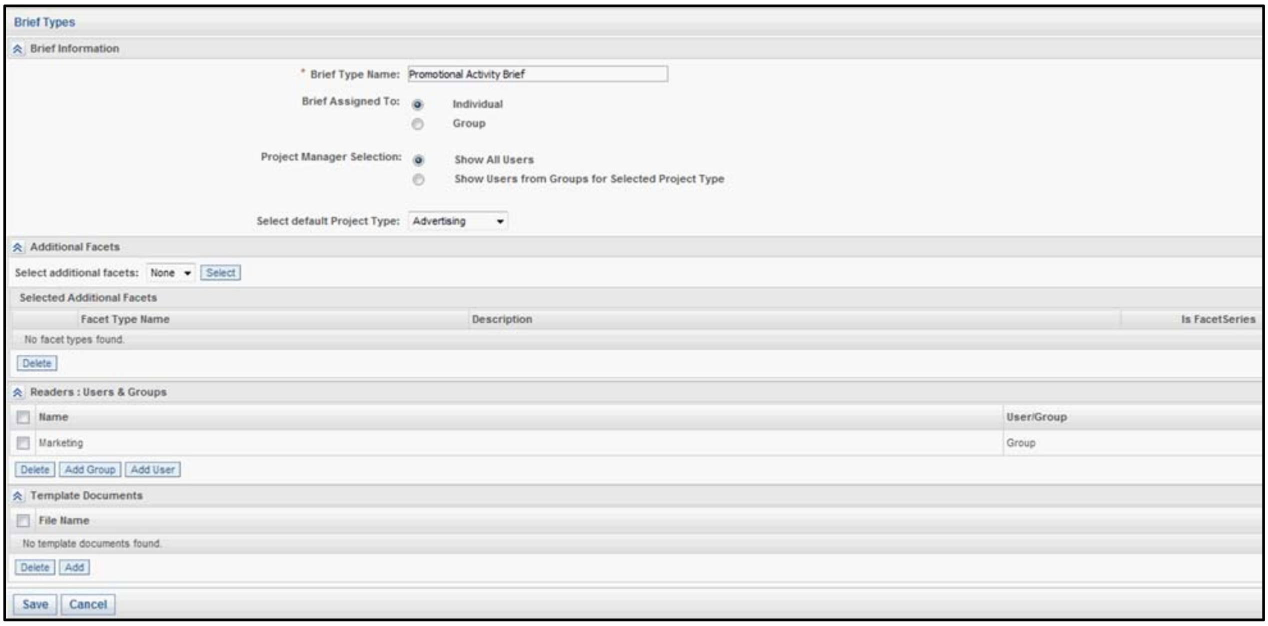


Figure No.30

11.11. Appendix

11.11.1. Configuring Facets for Briefs Types

If additional information needs to be attached with a brief then a facet is configured and associated with the brief entity. Follow the steps below:

Creating Facets

Click on the '**Schema Designer**' link on the left pane of the dashboard screen. The schema designer application is launched with three links on the left pane. To create a facet click on the '**Facet Types**' link. A search screen where the facets can be searched for or new facets may be created is displayed. Click on the '**Create**' button to create a new facet **(Figure 31)**.

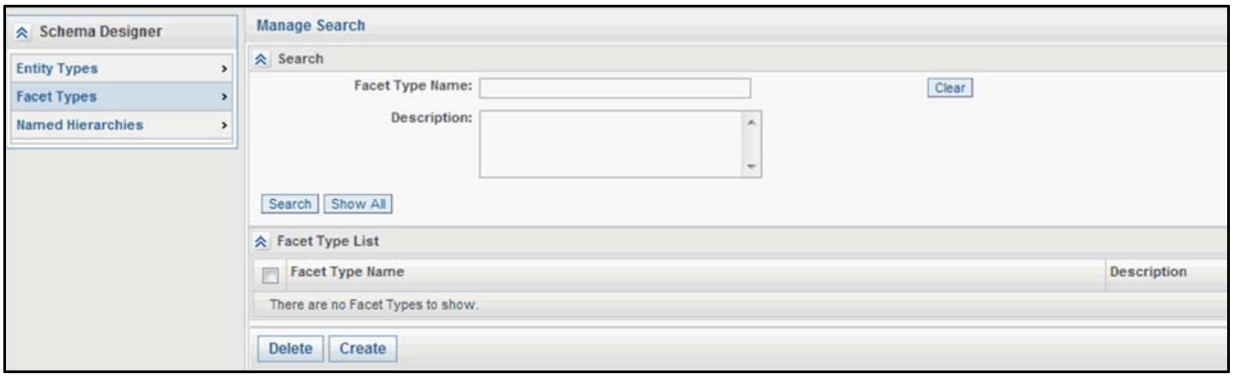


Figure No.31

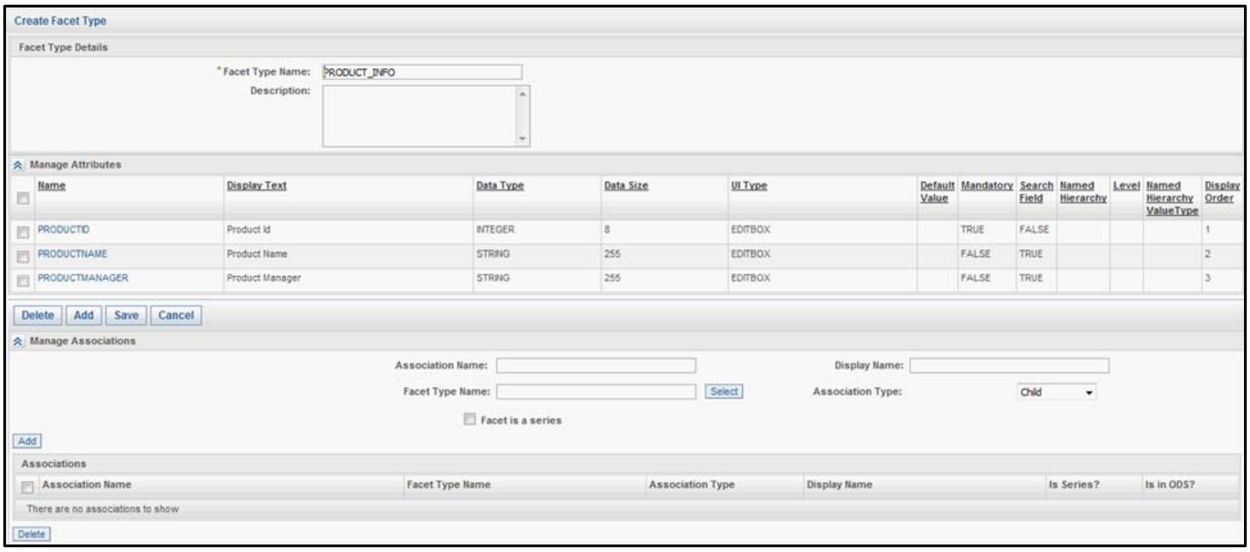


Figure No.32

A create facet type screen is displayed where the following information can be provided **(Figure 32)**:

- **Facet Type Name** – The name of the facet.
- **Description** - The description for the facet.
- **Manage Attributes** – By clicking on the '**Add**' button an 'Add Attribute' screen **(Figure 33)** is displayed. Details such as name, display text, data type, data size, UI type, default value and the display order are entered. Additional properties such as mandatory, a primary key or a search field can be selected. Click on the '**Add**' button to add this attribute.

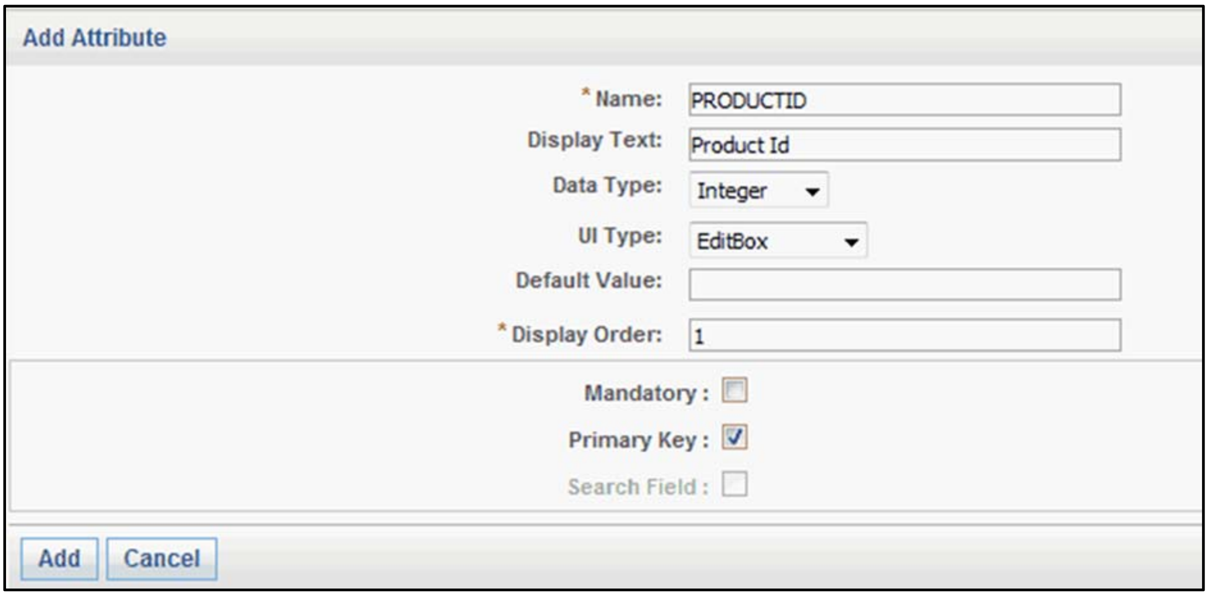


Figure No.33

Click on the '**Save**' button to save the facet **(Figure 33)**.

Associating the Facets with the Brief Entity

To associate the facet with the brief entity click on the '**Entity Types**' on the left pane **(Figure 31)**. Search for the '**BRIEF**' entity type. Click on the name link. An entity type details screen is displayed where the details of the entity type is displayed. In the manage associations section at the bottom of the scree associate the newly created facet by providing the association name, display name, select the facet type name and select the association type as dependent **(Figure 34)**. Click on the '**Add**' button to add this association. Click on the '**Home**' link on the top right corner to go back to the dashboard screen.

Figure No.34

11.11.2. Configuring Facets for Projects

If additional information needs to be attached with a project then a facet is configured and associated with the workflowprocess entity. Follow the steps below:

1. Creating a Facet - See section 8.12.1.1.
2. Associating the Facets with the WORKFLOWPROCESS Entity – It is the same as section 8.12.1.2 except that the entity with which the facet is to be associated with is 'WORKFLOWPROCESS'.

3. Associating Facets to Project Types - During creation of project type the facet created for a project can be selected as additional facets. Refer to **section 8.9** in process designer for associating facets to projects.
4. Configuring Project Screen to show Facet Fields – Same as **section 8.12.1.3** except that the form to be selected is 'Project_Details'.

11.11.3. Configuring Facets for Deliverables

If additional information needs to be attached with a deliverable then a facet is configured and associated with the workflowprocess entity. Follow the steps below:

1. Creating a Facet - **See section 8.12.1.1**.
2. Associating the Facets with the WORKFLOWPROCESS Entity – It same as **section 8.12.1.2** except that the entity with which the facet is to be associated with is 'WORKFLOWPROCESS'.
3. Associating Facets to Deliverable Types - During creation of the deliverable type the facet created for a deliverable can be selected as additional facets. Refer to **section 8.8** for associating facets to deliverables.
4. Configuring Deliverable Screen to show Facet Fields – Same as **section 8.12.1.3** except for the form to be selected is 'Deliverable_Details'.

11.11.4. Configuring Facets for Tasks

If additional information is required while configuring a Task then the following steps need to be taken:

1. Creating a Facet - **See section 8.12.1.1**.
2. Associating the Facets with the WORKFLOWPROCESS Entity – It same as **section 1.11.2** except for the entity with which the facet is to be associated with is 'WORKFLOWPROCESS'.
3. Associating Facets to Task Types - During creation of the task type the facet created for a task can be selected as additional facets. Refer to **section 8.7** in process designer for associating facets to tasks.
4. Configuring Deliverable Screen to show Facet Fields – Same as **section 8.12.1.3** except that the form to be selected is 'Task_Details'.

11.11.5. Configuring facets for Deliverables in a Brief

When the user specifies the deliverables in the brief, additional information can be captured while specifying the deliverable. This additional information is stored in a facet associated to the deliverable. The following steps need to be taken:

- Configuring Add Deliverable Screen on the Brief – It is the same as **section 8.12.1.3** but the form to be selected is 'Brief_Deliverable_Details'.

12. Approvals Admin

After signing in click on the '**Approvals Admin**' link provided on the dashboard screen on the left pane under '**Administration**'. An approval settings screen is displayed **(Figure 1)**.

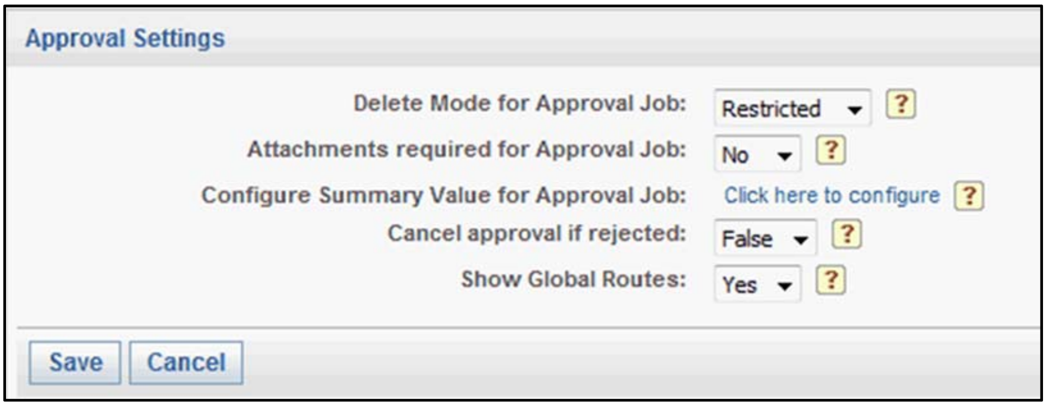


Figure No.1

The following settings can be done on this screen:

Workbench Settings		
Settings	**Expected Values**	**Explanation**
Delete Mode for Approval Job	Authorized/Restricted	The authorized mode allows the deletion of the approval job with any status. The restricted mode allows deletion of the approval job with the status as new or draft. **Note**: On a production server it should always be in the restricted mode.
Attachments required for Approval Job	Yes/No	This setting specifies whether attachments are required for the approvals job or not.
Configure Summary Value for Approval Job		Click the link to configure the named hierarchy values for the approval job.
Cancel approval if rejected	True/False	If the setting is true, the cancel approval if rejected checkbox is by default selected in the approval task. If it is false, the checkbox is unselected by default.
Show Global Routes	Yes/No	If the setting is yes, the routes created by the admin will be visible to all users. If the setting is no, the user can only view the routes created by the individual.

Save the settings by clicking on the '**Save**' button or to cancel click on the '**Cancel**' button.

12.1. Configure Summary Value in Approvals

When a job initiator routes a job the reviewer can summarize the review by adding values to the predefined summary values. These keywords or sentences can be configured through named hierarchy. To configure the summary values, follow the steps below:

1. Click on the '**Configure Summary Value**' link on the left pane or click on the '**Click here to configure**' link. The following predefined summary values are displayed **(Figure 2)**:

   a. Approved

   b. Rejected

   c. Skipped

   d. Cancelled

   Note: Values can be configured for Approved and Rejected nodes only. Values configured under Approved will result in the job review status being approved while any value selected under the rejected node will result in the job being marked as rejected finally.

2. Select the radio button at the level at which the values need to be added to the hierarchy.
3. Click on the '**Add Value**' button which displays an add NH-Value screen.
4. Enter the name and description and click on the '**Save**' button. The new value is added to the hierarchy. The total number of values added under the root appears next to it.
5. Add in more values using the same interaction.

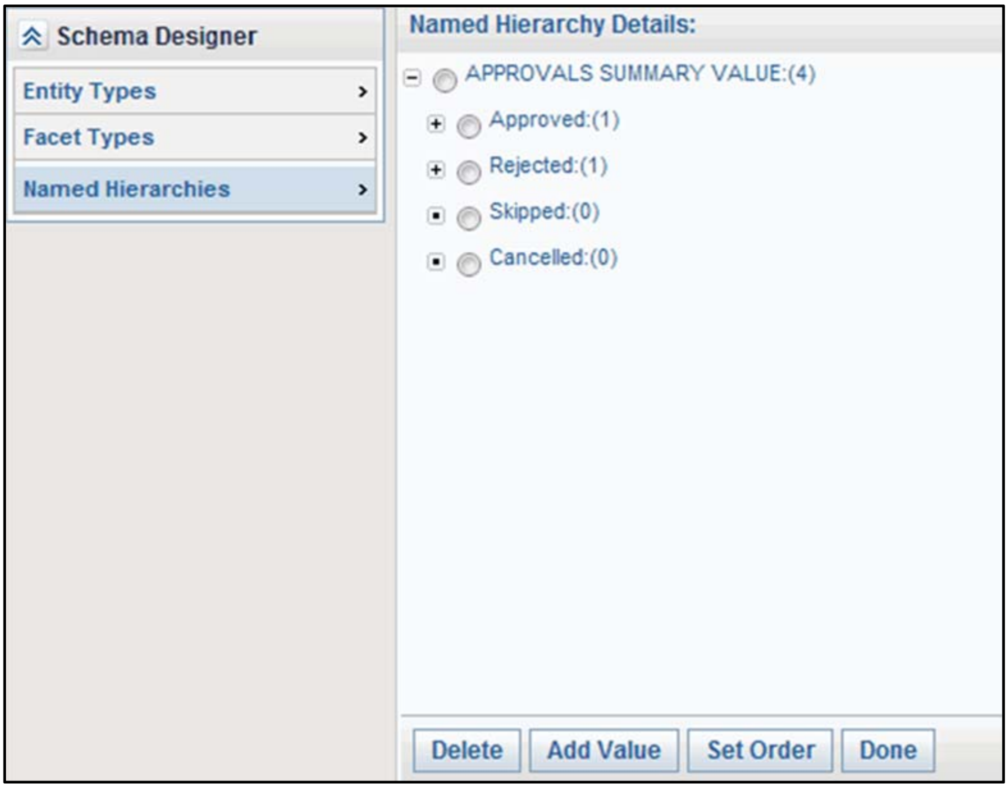


Figure No.2

13. Resource Management admin

The admin settings for Timesheets and Resource Management can be done by clicking on the '**Resource Management Admin**' link on the left pane under administration.

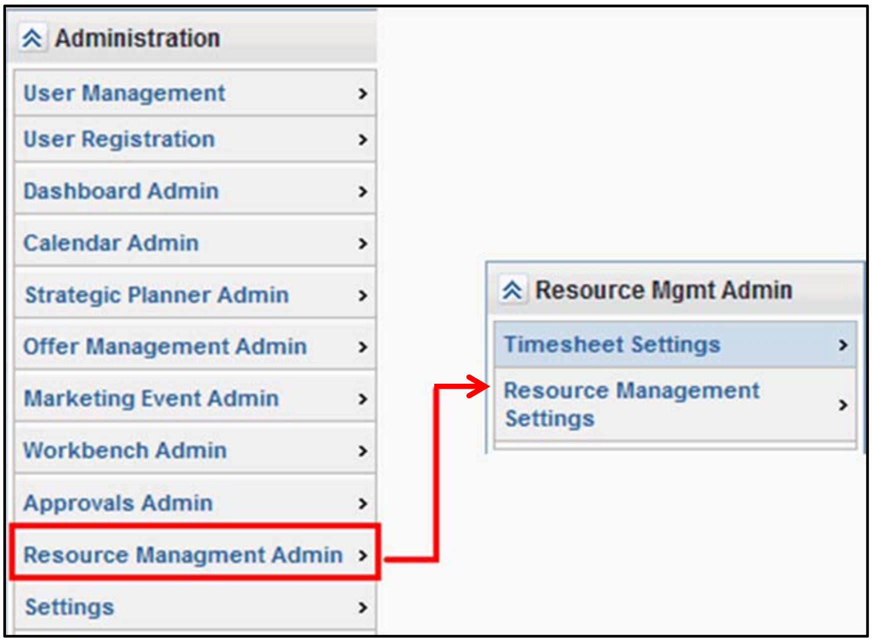


Figure No.1

13.1. Timesheet Settings

A 'Timesheet Settings' screen is displayed **(Figure 2)** by default. The following settings can be configured:

- **Timesheet View** – The default value for this setting is 'Daily'. This setting determines the frequency with which timesheets will be submitted and approved. This will also determine the default view of timesheet submission and approval. Currently there is only a Daily View of the Timesheet
- **Flag Timesheet for Approval if (> number of hours per day)** - Default value for this setting will be '10'. This setting will determine the maximum number of hours that the user is allowed to work for a day in the organization. A timesheet that exceeds these number of hours of working in a day will be flagged off for the approver to alert of an exceptional condition
- **Timesheet Approval Group/Users**: The Admin user can select the groups and the users who can approve the timesheets. Multiple user group selection can be done

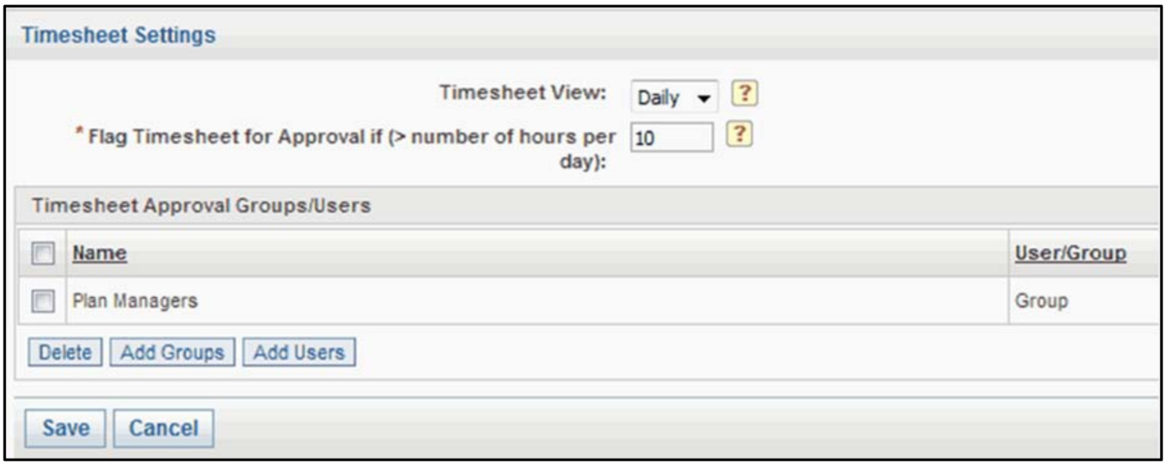


Figure No.2

13.2. Resource Management Settings

Click on the '**Resource Management Settings**' link **(Figure 17)** to do the following settings:

- **Show Resource Availability Tab** - Show Resource Availability Tab set to Yes means that the Availability tab is shown to a Resource via the Tools>Resources i.e. Resources can mark their own availability. If this setting is set to 'No' the availability tab is not displayed to a Resource. The Category Head can mark the availability of a resource from Resource Planner. The default value for this setting is 'No'
- **Show Resource Category Allocation Graph in Executive Dashboard** - This will specify whether to show the Resource Category Allocation Graph for a selected plan in the Executive Dashboard channel. The default value for this setting is 'Yes'
- **Show Resource Category Allocation Graph in Marketing Budgets channel** - This will specify whether to show the Resource Category Allocation Graph at Plan/Program/Activity level within the Marketing Budgets dashboard channel. The default value for this setting is 'Yes'

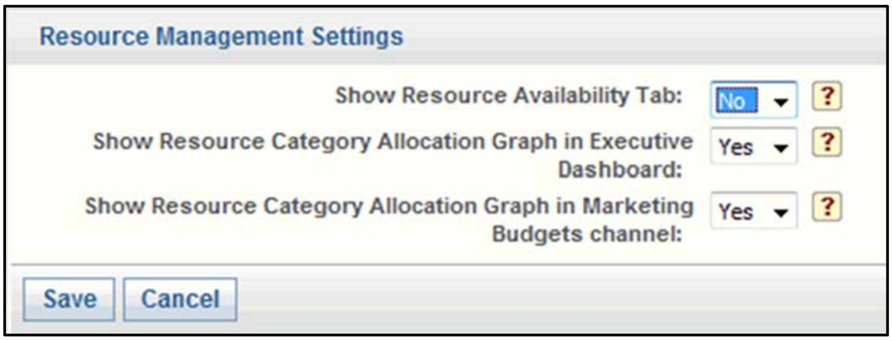


Figure No.3

14. Settings

SAS Marketing Operations Management settings include account policies, password policies, notification settings, email settings, cataloguer settings etc. related to the current tenant.

Click on the '**Settings**' link on the left pane under '**Administration**' on the dashboard to view/modify the settings for the tenant.

14.1. Account Policies

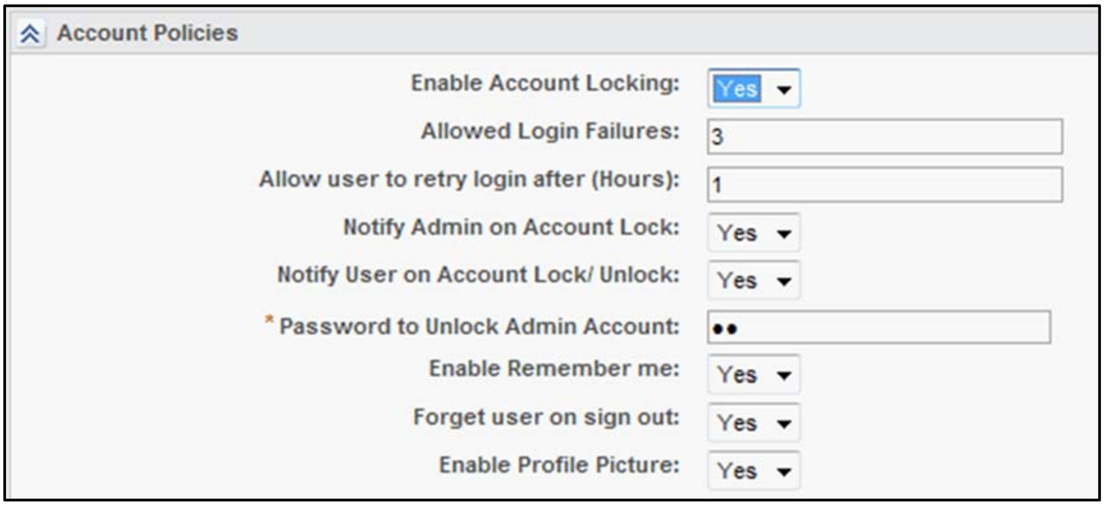


Figure No.1

Account Policies: Settings related to user accounts		
Setting	**Expected Values**	**Explanation**
Enable Account locking	Yes/No	Enabling or disabling the user account-locking feature
Allowed login failures	User defined (numeric)	Number of consecutive login failures after which the account gets locked
Allow user to retry login after (Hours)	User defined (numeric)	Number of hours after which the user can try to login again
Notify Admin	Yes/No	Whether to notify the administrator in case account gets locked
Notify User	Yes/No	Whether to notify the user in case the account gets locked
Password to unlock admin account	Provide Password	Another administrator password, in case the administrator account gets locked
Enable Remember me	Yes/No	If this feature is enabled then the 'Remember Me' checkbox is visible on the login page. If the user selects the 'Remember Me' checkbox then the user will not be asked to enter the credentials while launching SAS

		Marketing Operations Management following a successful login and will be redirected to the default solution page.
Forget user on sign out	Yes/No	This setting specifies whether to remove the user details stored in the cookie on sign out or not. If this key is set to 'Yes', the user will have to provide the credentials for each browser session after sign out. If this key is set to 'No', then on sign out only the message will be displayed, the login page is not displayed in this case.
Enable Profile Picture	Yes/No	If 'Yes' then the user picture will appear in the user profile and in the discussion forum when the user posts comments.

14.2. Password Policies

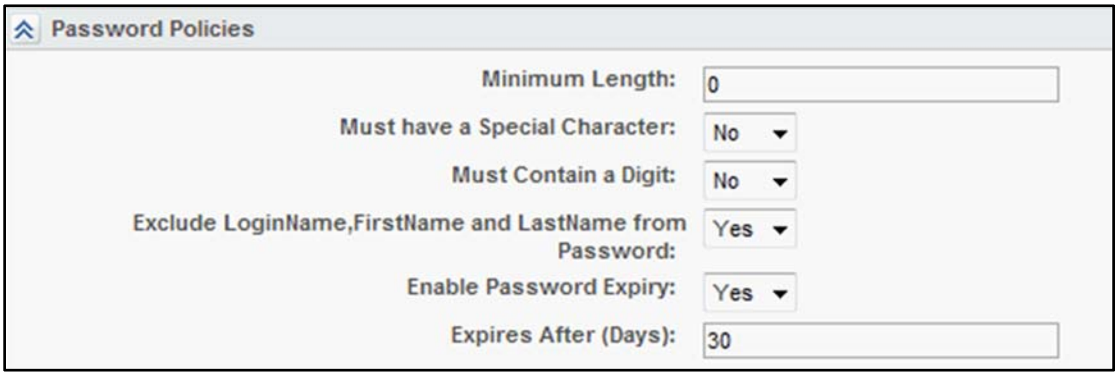


Figure No.2

Password policies: Settings related to the user account passwords		
Setting	**Expected Values**	**Explanation**
Minimum length	0	The minimum length of the password.
Must have a special character	Yes/No	Whether the password should contain a special character.
Must contain a digit	Yes/No	Whether the password should contain a digit.
Exclude Login, First, Last Name from Password	Yes/No	Whether the password should exclude the login, first, last name.
Enable password expiry	Yes/No	Enable/disable the password expiry.
Expires after (days)	Any Numerical Value	If the password expiry is enabled, the number of days after which the password expires and has to be changed.

Note: Whenever password policies are changed 'Unlock password' for admin is checked to confirm to the changed policy.

14.3. Notification Settings

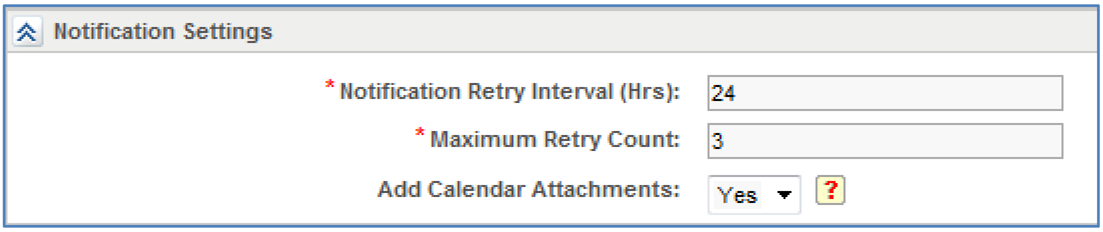


Figure No.3

Notification Settings: Settings related to the notifications/emails sent by the system to the users		
Setting	**Expected Values**	**Explanation**
Notification Retry Interval (Hrs)	24	Time interval in hours after which the system will resend a notification, if the earlier attempts to send were unsuccessful.
Maximum Retry Count	3	Number of times the system attempts to resend the notification in case of failure to deliver.
Add Calendar Attachments	Yes/No	Tasks assigned to a person from the SAS Marketing Operations Management system have been converted to a Calendar task so that the task can be set on the users Calendar. This setting allows the user to enable/disable the calendar feature. If this setting is set to 'Yes' then the user will receive a calendar attachment in the mail which when opened by the user gives an option of saving it in the email client (which supports calendars such as Outlook calendar) as a calendar. Currently this feature is only available with the Budget Approval Emails in Planner.

14.4. Email Settings

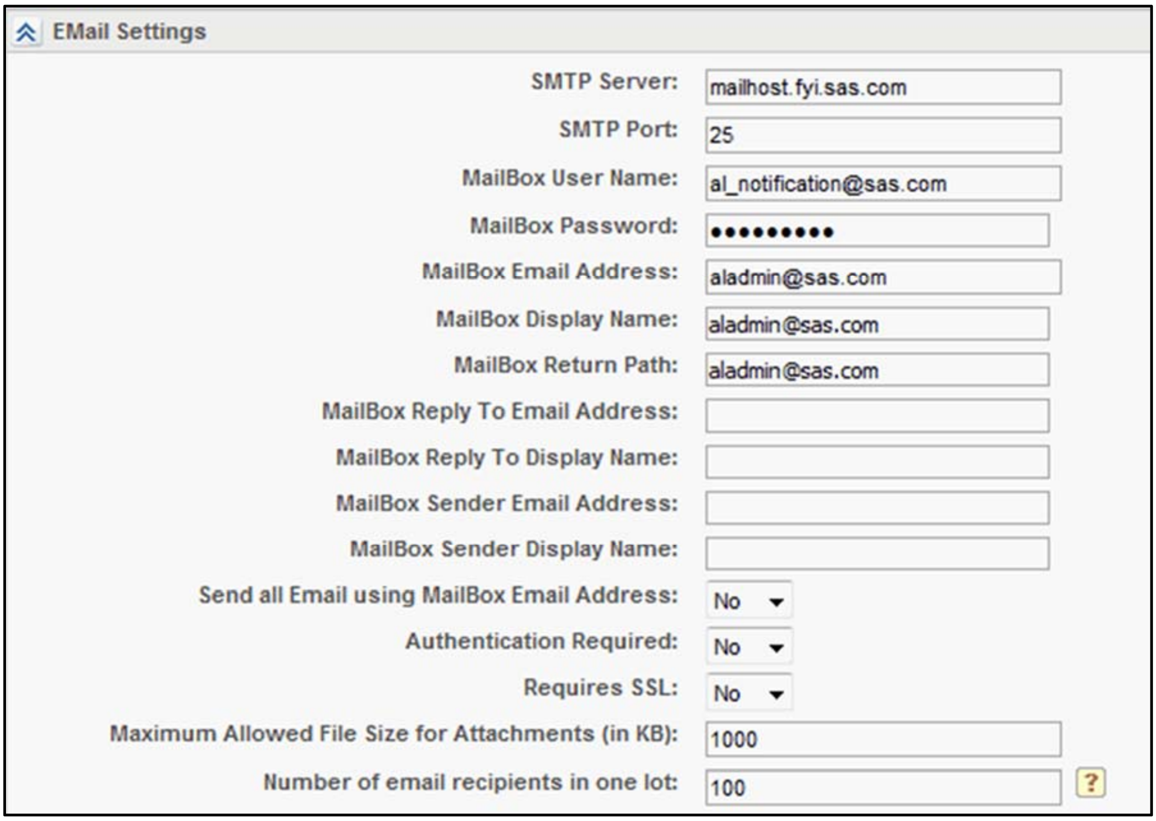


Figure No.4

Email Settings: Settings related to the Email server		
Setting	**Expected Values**	**Explanation**
SMTP Server	<Machine address> e.g. 69.20.48.246 or smtp.emailsrvr.com	IP address or the DNS name of the SMTP server
SMTP Port	<Port number> e.g. 25, 587	Port to be used to connect to the SMTP server.
Mailbox User Name	<User Name>	User name to be used to authenticate against the SMTP server.
Mailbox Password	<Password>	Password to be used to authenticate against the SMTP server.
Mailbox Email Address	<Email address> e.g. aluser@sas.com	Email address of the account used for sending the system notifications.
Mailbox Display Name	<Display Name> e.g. SAS MOM System	Display name of the account used for sending the system notifications.
MailBox Return Path	<Return Path> e.g. bouncedmail@sas.com	Mailbox that receives the bounced notifications sent by the SAS Marketing Operations Management system.
MailBox Reply to Email Address	<Reply-To Address> e.g. support@sas.com	The Reply to address for the email notifications sent by the SAS Marketing Operations Management system.

MailBox Reply to Display Name	<Reply-To Display Name> e.g. SAS MOM Support	Display the name for the Reply To account for notifications sent by the SAS Marketing Operations Management system.
MailBox Sender Email Address	<From Address> e.g. aluser@sas.com	The sender address for the email notifications sent by the SAS Marketing Operations Management system. **Note**: If this email address is not set, the system will not send out notifications, in some cases.
MailBox Sender Display Name	<From Display Name> e.g. SAS MOM System	The display name for the sender account for emails sent by the SAS Marketing Operations Management system.
Send all Email using MailBox Email Address	Yes/No	Whether all the emails are to be sent using the mailbox email address.
Authentication Required	Yes/No	If yes then credentials are applied while sending the mail. If no then there is no authentication performed against the mail server. **Note**: Select the value "Yes" for this setting and ensure that the password has been provided.
Requires SSL	Yes/No	Specifies whether authentication is to be performed over a secure channel.
Maximum Allowed file size for attachments (In KB)	Numeric	The maximum file size, in kilobytes, of the attachments in the email.

14.5. Cataloger Settings

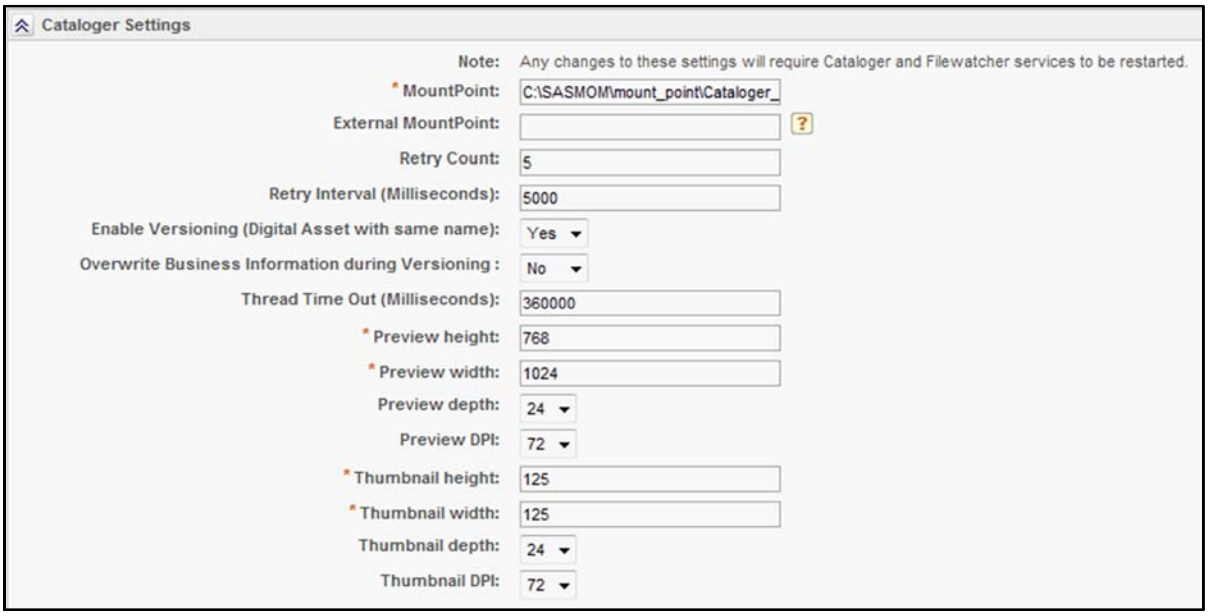


Figure No.5

<table>
<tr><th colspan="3">Cataloger Settings: Settings related to Cataloger</th></tr>
<tr><th>Setting</th><th>Expected Values</th><th>Explanation</th></tr>
<tr><td>Mount Point</td><td><Folder location /path></td><td>Location of the folder from where the asset for cataloging will be picked up by the system.</td></tr>
<tr><td colspan="3">Note:
1. The mount point should be located in a folder other than the tenant folder i.e. it can reside within the installation directory but not under the tenant folder. E.g. the mount point can be in a folder called Mount Points under D:\SASMOM60. If there is a tenant called ‘MOM’ do not keep the mount point under it as there is a performance issue associated with this.
2. If Secondary Cataloger is installed, then the mount point for it needs to be provided.</td></tr>
<tr><td>External MountPoint</td><td><Folder location /path></td><td>This is the MountPoint configured for external or third party users who can not access the cataloger MountPoint configured within the network. This can be either the physical path or the UNC path, which should be accesible to the DAMJobCopy service.</td></tr>
<tr><td colspan="3">Note: The Admin needs to provide this mount point and configure FTP site for this location. This FTP site will be shared with vendors and get treated as an external cataloger mount point for vendors. Vendors are supposed to drop their jobs at this location by following cataloger job convention. DAM JOB Copy service will take care of transferring these jobs under the actual cataloger mount point.
DAM job Copy service should be installed by running "InstallDAMJobCopyServices.bat" batch file. This service should be started after saving tenant configuration for External Mountpoint.
To uninstall this service, user can run "UninstallDAMJobCopyServices.bat".</td></tr>
<tr><td>Retry Count</td><td>5</td><td>Number of times the system will retry to catalog the asset in case of failure during the first attempt.</td></tr>
<tr><td>Retry Interval (Milliseconds)</td><td>Numeric field</td><td>Time interval in milliseconds between the retry attempts.</td></tr>
<tr><td>Enable Versioning (Digital Asset with same name)</td><td>Yes/No</td><td>Enable/disable the creation of new version of the asset.</td></tr>
<tr><td>Overwrite Business Information during Versioning</td><td>Yes/No</td><td>Whether to allow overwriting of business information while versioning.</td></tr>
<tr><td>Thread Time Out (Milliseconds)</td><td>10000</td><td>Time duration in which the thread (connection between the source and destination of cataloging) will time out.</td></tr>
</table>

The preview and thumbnail height, weight, depth and the DPI is to be entered. There is a default measurement given but the administrator could change it.

Note: Any changes made in the Cataloger settings will require the Cataloger and Filewatcher services to be restarted.

14.6. Audit Settings

Figure No.6

Audit Settings: Settings related to logs		
Setting	**Expected Values**	**Explanation**
Log Audits	Yes/no	The user activities can be logged based on this input. The yes option will log user activity and no will turn off the logging.

14.7. Media Streaming

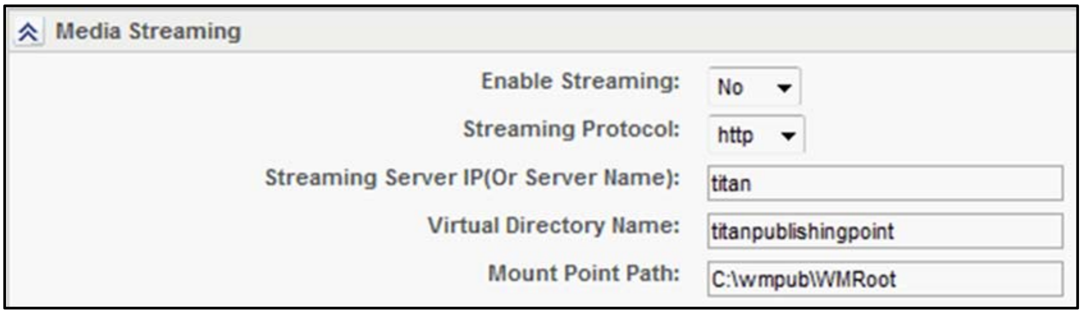


Figure No.7

Media Streaming: Settings related Media streaming		
Setting	**Expected Values**	**Explanation**
Enable Streaming	Yes/No	Whether the Media streaming enabled for this client.
Streaming Protocol	http/mms	The Protocol to be used for streaming videos can be either http or mms. It is recommended to have the protocol as mms.
Streaming Server IP (Or Server Name)	IP address or server name	The IP address or server name which hosts the window media server (given while creating a publishing point).
Virtual Directory Name	Name of the virtual directory	The virtual directory configured on the media server machine for sharing or streaming videos (the same as the alias given while creating a publishing point).
Mount Point Path	Complete folder path, which is used for downloading videos for streaming on the Windows Media server.	The physical location of the virtual directory (the same as the location specified while creating a publishing point).

14.8. Date Calculation Settings

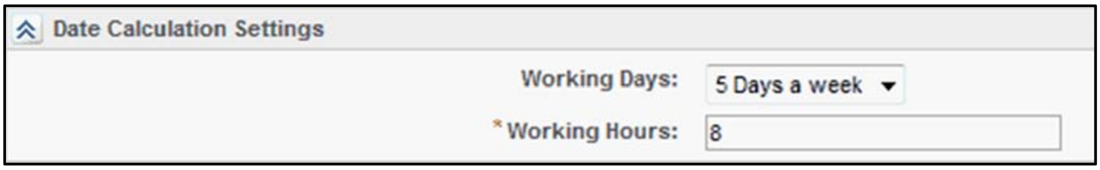


Figure No.8

Date Calculation Settings: Settings related to the dates		
Setting	**Expected Values**	**Explanation**
Working Days	5 Days a week/6 Days a week	Specify the working days in a week.
Working Hours	Default value is 8	Number of working hours in a day.

14.9. Exchange Rate Settings

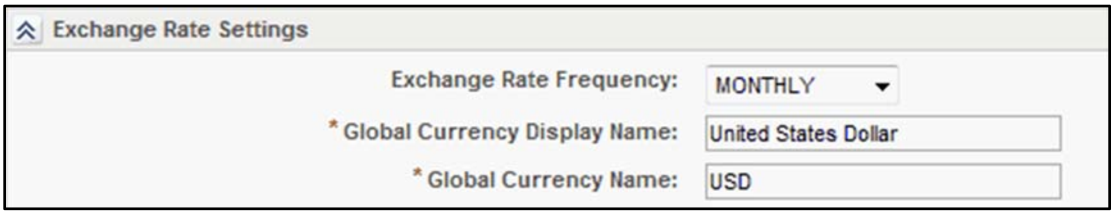


Figure No.9

Exchange Rate Settings		
Setting	**Expected Values**	**Explanation**
Exchange Rate Frequency	Daily, Weekly, Monthly, Quarterly, Half yearly, Yearly	The interval to update the exchange rate for the currencies. By default it is monthly.
Global Currency Display Name	Currency name E.g. USD, Euro, GBP etc.	The display name for the global currency.
Global Currency Name	The currency used in the country	This is the default global currency.

14.10. Artwork Producer Settings

Figure No.10

Artwork Producer Settings		
Setting	**Expected Values**	**Explanation**
Vault Name	ArtworkProducer	The artwork producer vault name where all the artwork producer related assets are stored. This name should match the name of the vault created for Artwork producer in Digital Library.
Format Definition Section Name	Formats	The section where the format definition files are stored. This section is created automatically when Artwork Producer is used.
Generated Artwork Section Name	Generated Artworks	The section where all the generated artwork are stored. This section is created automatically when Artwork Producer is used.

14.11. Format Watcher Settings

Figure No.11

Format Watcher Settings		
Setting	**Expected Values**	**Explanation**
Format Watcher Mount Point	<Folder location /path>	Location of the folder from where the InDesign format will be picked for creation by the system.
Note: The format watcher mount point should be located in a folder other than the tenant folder i.e. it can reside within the installation directory but not under the tenant folder. E.g. the format watcher mount point can be in a folder called format watcher mount point under D:\SASMOM60. If there is a tenant called 'MOM' do not keep the format watcher mount point under it as there is a performance issue associated with this.		

Note: Any changes made in the format watcher settings will require the format watcher service to be restarted.

14.12. Default Solution Settings

Figure No.12

Default Solution Settings

Setting	Expected Values	Explanation
Default Solution Page	Dashboard, Strategic Planner, Marketing Workbench, Approvals, Digital Library, Knowledge Manager, Site Builder, Artwork Producer or Reports	This is the setting for the display of the default solution page when the user logs into the SAS Marketing Operations Management system.

14.13. DAM Settings

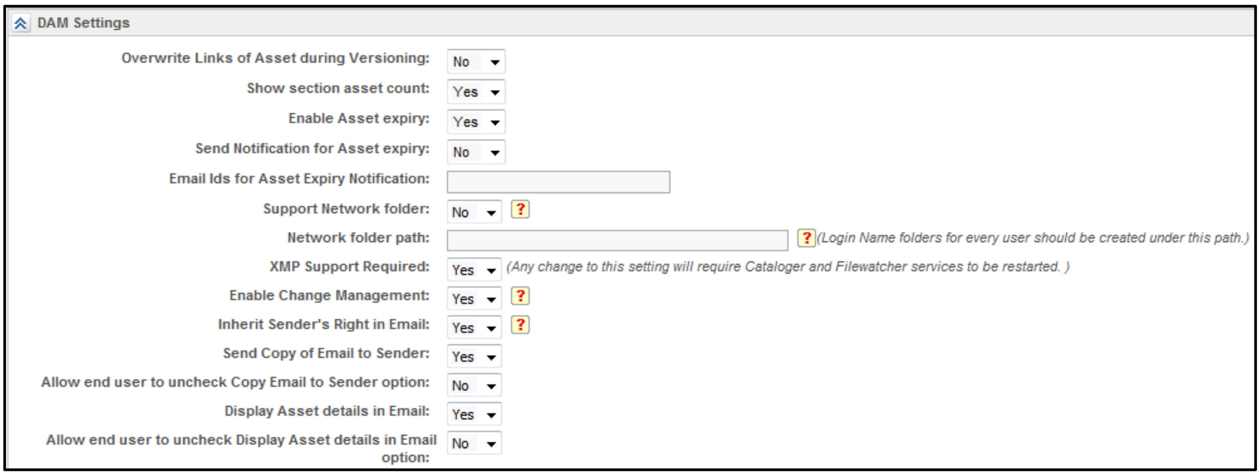


Figure No.13

DAM Settings		
Setting	**Expected Values**	**Explanation**
Overwrite Links of Asset during Versioning	Yes/No	Whether to overwrite the links of assets during versioning.
Show section asset count	Yes/No	If yes then the asset count in the section will be displayed.
Enable Asset Expiry	Yes/No	If yes then the expiry of asset is enabled.
Send Notification for Asset expiry	Yes/No	If yes then a notification is sent to the email ID's configured in the setting below on the expiry/revival of asset. The notification will go out as a reminder 5 days prior to the expiry as well as when the asset expires.
Email Ids for Asset Expiry Notification	User e-mail Id's separated by commas	E-mail Id's of users, who should receive the notification on asset expiry/revival.
Support Network Folder	Yes/No	If this setting is set to 'Yes', then the file upload and download can be done from a configured network folder mentioned below.
Network folder path	This is the path to a configured network folder. For e.g.	The login name folders for every user should be created under this path. Under each login name

	\\(machinename/IP address)\(Network folder name)	should be two folders - Upload and Download.
XMP Support Required	Yes/No	If the setting is set to 'Yes' then the user can create assets that carry information within themselves such as copyright information, photography information or the information about the camera on which the image was taken etc. Each time a asset is uploaded it can carry different information with it that can be stored in DAM.
Enable Change Management	Yes/No	If any changes are made to the business information of an asset then it can be tracked. If this setting is 'Yes' then the changes will be tracked. By default it is set to 'No'.
Inherit Sender's Right in Email	Yes/No	If 'Yes' then the assets sent via the DAM Email will inherit sender's access rights. If set to 'No' they will inherit receiver's access rights.
Send Copy of Email to Sender	Yes/No	If 'Yes' then the user who is sending out the email will be sent a copy of the E-mail by default.
Allow end user to uncheck Copy Email to Sender option	Yes/No	If the above setting is 'Yes' then a checkbox will be available on the E-mail screen which can be unchecked if the email does not need to be sent to the sender of the email, this can be done if this setting is 'Yes'.
Display Asset details in Email	Yes/No	You can now choose to display additional asset information along with the asset links. For example, the Asset Name, Vault and Section Path can now be added as additional information along with the list of Assets in the E-mail
Allow end user to uncheck Display Asset details in Email option	Yes/No	If the above setting is 'Yes' then a checkbox will be available on the E-mail screen which can be unchecked if asset details do not need to be sent in the email, this can be done if this setting is 'Yes'.

14.14. Approval Settings

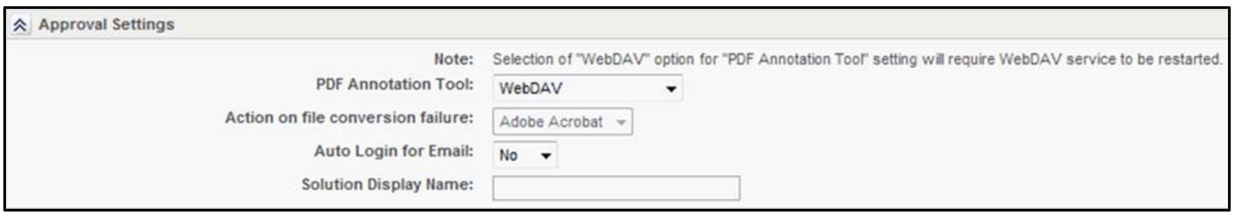


Figure No.14

WebDAV Support for Approvals settings		
Setting	**Expected Values**	**Explanation**
PDF Annotation Tool	SAS MOM Annotations/Adobe Acrobat/WebDAV	SAS MOM Annotations – Will have the SAS Marketing Operations Management Tool support. Adobe Acrobat – Will use Adobe Acrobat for PDF files. WebDAV - Approvals module will have the WebDAV support.
Action on file conversion failure	Cancel/Adobe Acrobat	In case of SAS MOM Annotations, the file that is uploaded gets converted to .swf. In case the job fails for some reason these settings need to be specified: • Cancel: In case of failure, the job should get cancelled. • Adobe Acrobat: In case of failure, the job should get converted to a standard job where the user can download the file and put in comments and upload it back into the system
Auto Login for Email	Yes/No	Whether the user needs to login when viewing an email received by the user.
Solution Display Name	User defined	

Note: Any change made to the 'WebDAV required' setting will require the WebDAV service to be restarted.

14.15. Import Invoice Settings

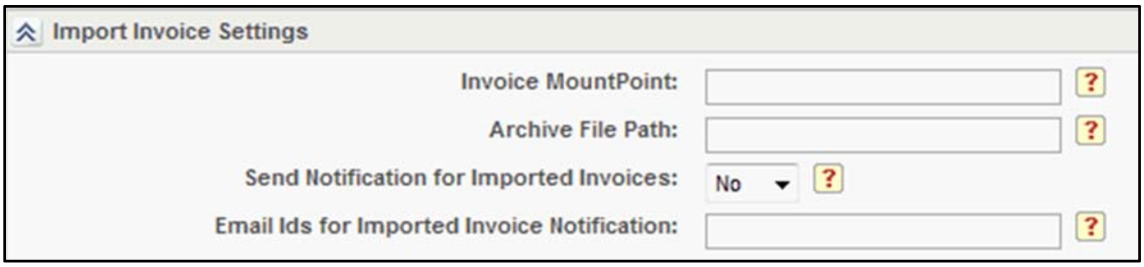


Figure No.15

Import Invoice settings		
Setting	**Expected Values**	**Explanation**

Invoice MountPoint	User defined	This is the path where the invoice xmls will be loaded for processing.
Archive File Path	User defined	This is the path where the imported invoice files will be archived after processing.
Send Notification for Imported Invoices	Yes/No	If this setting is set to Yes then a notification will be sent to all the users selected below for all the processed files.
Email Ids for Imported Invoice Notification	User defined	E-mail Ids of the users to whom the notification needs to be sent. Enter comma separated e-mail ids in case there are multiple users.

14.16. BackOffice Settings

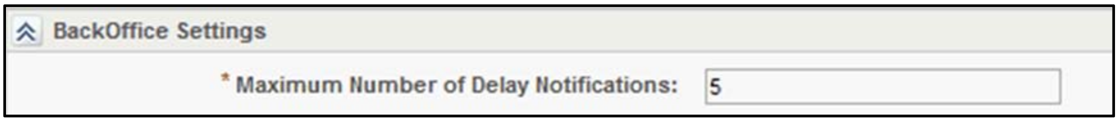


Figure No.16

BackOffice Settings		
Setting	**Expected Values**	**Explanation**
Maximum Number of Delay Notifications	User defined	After certain (configurable) no. of reminders, contributor will not be notified of the delayed tasks via delayed reminders.

Click on the '**Save**' button at the bottom of the settings screen to save the changes made.

14.17. Concurrent Login Settings

Figure No.17

Concurrent Login Settings		
Setting	**Expected Values**	**Explanation**
Allow Concurrent Logins	Yes/No	If 'Yes' then the user is allowed to have concurrent logins on other browsers or on different machine, if 'No' then the user will not be allowed to have concurrent logins.

14.18. My Calendars Settings

Figure No.18

My Calendars Settings		
Setting	**Expected Values**	**Explanation**
Start Day of the Week	One of the day of the week	The start day of the week for the server.

14.19. Claims Management Settings

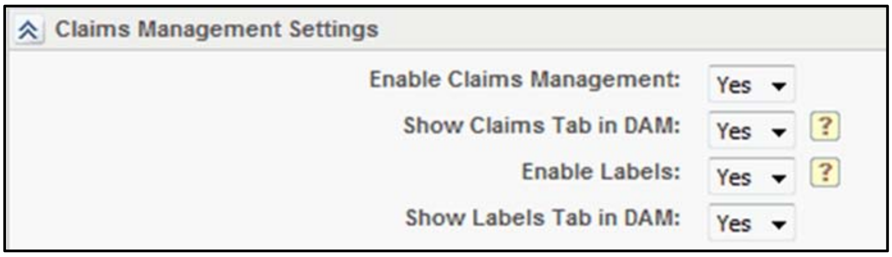


Figure No.19

Claims Management Settings		
Setting	**Expected Values**	**Explanation**
Enable Claims Management	Yes/No	If this is set to 'Yes' then the rest of the settings are visible and the 'Claims Management' link is visible on the left pane of the Dashboard screen.
Show Claims Tab in DAM	Yes/No	If this setting is set to 'Yes' then a 'Claims' tab is visible in the Asset information of an asset in DAM.
Enable Labels	Yes/No	If this setting is set to 'Yes' then a 'Labels' link is visible in the Claims Management module.
Show Labels Tab in DAM	Yes/No	If this setting is set to 'Yes' then a 'Labels' tab is visible in the Asset information of an asset in DAM.

15. Digital Library

Digital library organizes the digital assets related to packaging graphics, sales brochures, point-of-purchase, advertising and various communications resources in a centralized, secure repository. Administrators can search, browse and retrieve these digital assets for use through any web browser. This document describes administrative activities, which can be performed by a system administrator.

15.1. Getting Started

After signing in click on the '**Digital Library**' link on the dashboard screen on the left pane to launch the digital library solution. On the left pane under the section '**Administration**' there are links to administrative applications as follows:

- Vaults – Create/edit vaults and vault properties.
- Security Policies – Create/edit security policies for section and vault.
- Settings – Allows default setting for the application.
- Asset Descriptor – Define a set of information to be shown next to each asset thumbnail in the list view.
- Recycle bin – Besides deleting assets permanently, it also allows restoration of deleted assets into the respective section.
- Asset Metadata Report Configuration – A template is a preconfigured report layout. The user is able to configure this using, 'Asset Metadata Template Configuration' utility. A default template is present in the system.

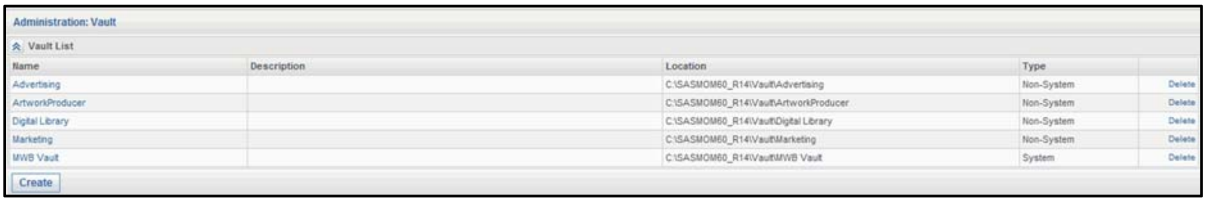
Note: This section is available only to those who have the administrative rights (Administrators group).

15.1.1. Vaults

Vaults are secure spaces on the file system where all the digital assets are stored. There can be multiple vaults in the digital library. An organization could have a separate vaults for each brand, operating company, business unit, division, or department.

Creating Vaults

Click on the '**Vaults**' link on the left pane under '**Administration**'. A list of the existing vaults is displayed. Each row of the list gives details such as the name, description, mount point and type **(Figure 1)**. To edit the vault details click on the vault name link. To delete a vault click on the '**Delete**' button next to each vault.



Administration: Vault

Vault List

Name	Description	Location	Type	
Advertising		C:\SASMOM60_R14\Vault\Advertising	Non-System	Delete
ArtworkProducer		C:\SASMOM60_R14\Vault\ArtworkProducer	Non-System	Delete
Digital Library		C:\SASMOM60_R14\Vault\Digital Library	Non-System	Delete
Marketing		C:\SASMOM60_R14\Vault\Marketing	Non-System	Delete
MWB Vault		C:\SASMOM60_R14\Vault\MWB Vault	System	Delete

Create

Figure No.1

Click on the '**Create**' button to create a new vault. Enter the following details:

- Name – The vault name.
- Description – The description.
- Location – Specify the location of the vault on the file system. The specified location should be the complete file path with the vault name.
- Disk Space – By default the disk space is set to 10 GB which can be increased or decreased based on the available memory.

  Note: When the vault disk space gets utilized to a specified capacity, the system sends a mail to the administrator of the system and the section owner about the disk capacity usage. Other users can be included to receive the notification, if required.
- Security policy – Specify the security policy for the vault (See the Security Policy section below).
- Specify whether it is a system vault by selecting the check box. System vaults are used by solutions and applications for storing application related assets and are not visible to the end users.

If the Log Audit settings (Settings) are set to 'True' then the following additional features are available while creating vaults:

1. **Terms and Conditions** – The administrator can optionally set terms and conditions for downloading content from the vaults. In order to control the use of the contents, some departments can force the acceptance of the legal '**Terms and Conditions**' before downloading assets. While creating a vault, the '**Terms and Conditions**' may be set for downloading assets from it. The user has two option while configuring the '**Term and Conditions**':
   - **Use default**: The system default '**Terms and conditions**' will be used.
   - **Use vault specific**: If the text option is selected then the administrator can enter the text in the space provided. If the file option is selected then a file can be uploaded (PDF and HTML file types are supported but use of images is not allowed).
2. **Reason for download** – The administrators can optionally track reason for download and configure a facet and form for it (Facet created should be associated with the 'AUDITLOG' entity). Different facets can be configured to allow different details to be captured as the part of the reason for download. The facet for the reason for download for a specific vault can be associated with the vault while creating it. The user has two option while configuring the reason for download:
   - **Use default**: The default facet will be used.
   - **Use vault specific**: The facets created by the administrator can be used.

After selecting the facet the form for the facet can be edited by clicking on the '**Configure form**' button.

Click on the '**Save**' button to save the new vault or to cancel the operation click on the '**Cancel**' button **(Figure 2)**.

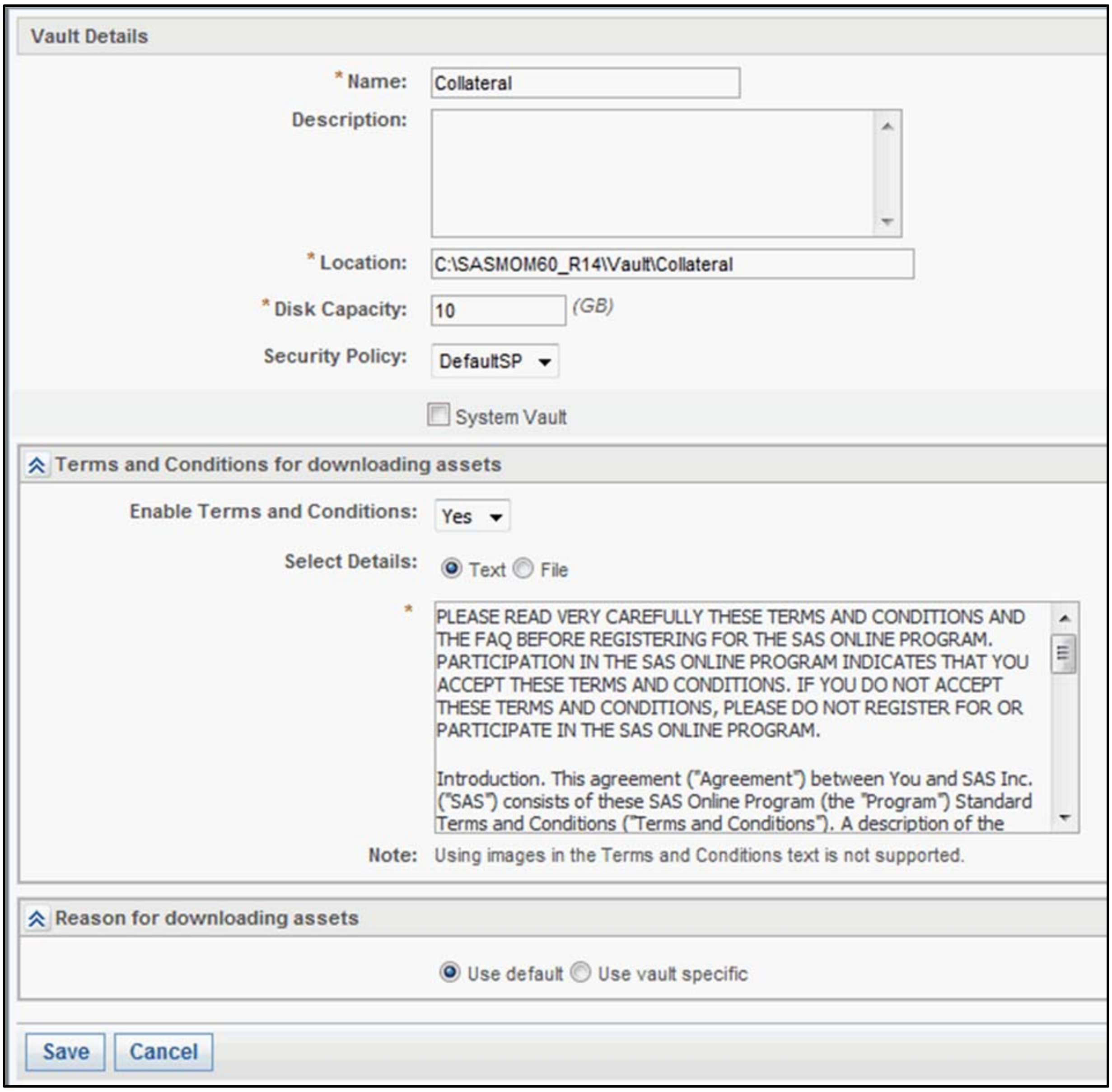


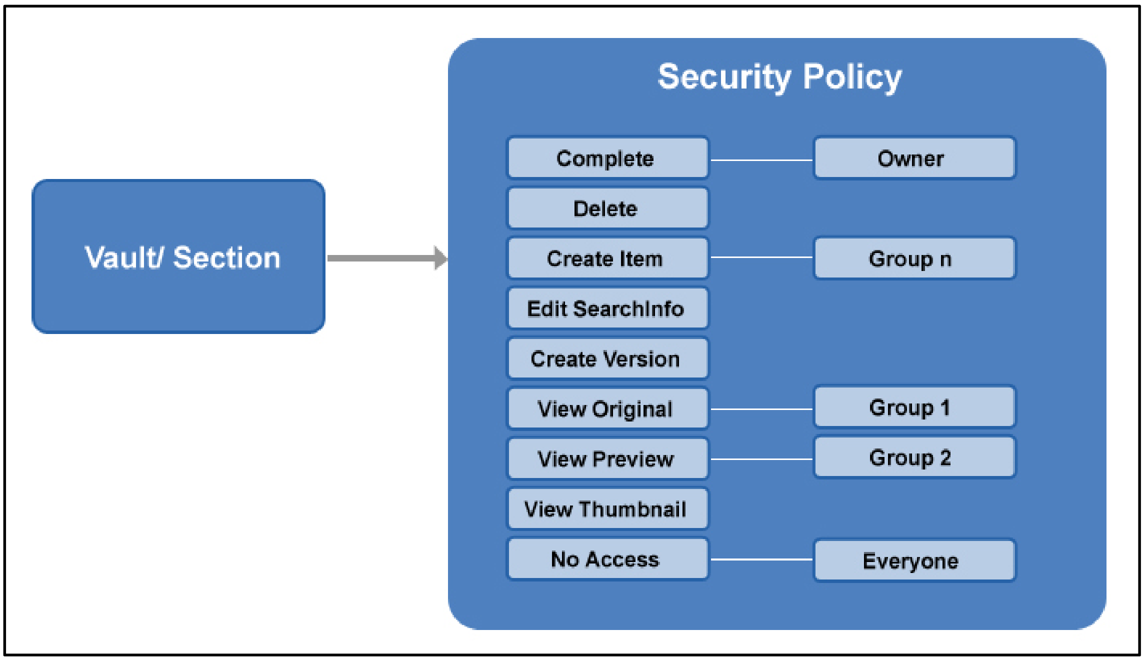
Figure No.2

Note: Vaults have to be located in a folder other than the tenant folder i.e. it can reside within the installation directory but not under the tenant folder. E.g. A vault can be in a folder called vaults under D:\SASMOM60. If there is a tenant called 'MOM' do not keep the vault under it as there is a performance issue associated with this.

15.1.2. Security Policies

What is Security Policy?

The security policy enables the administrator to restrict access to the system and protect the digital content from any unauthorized use. The security policy allows restricted access to the selected user group within the policy. Security policies are applied at the vault or section level.

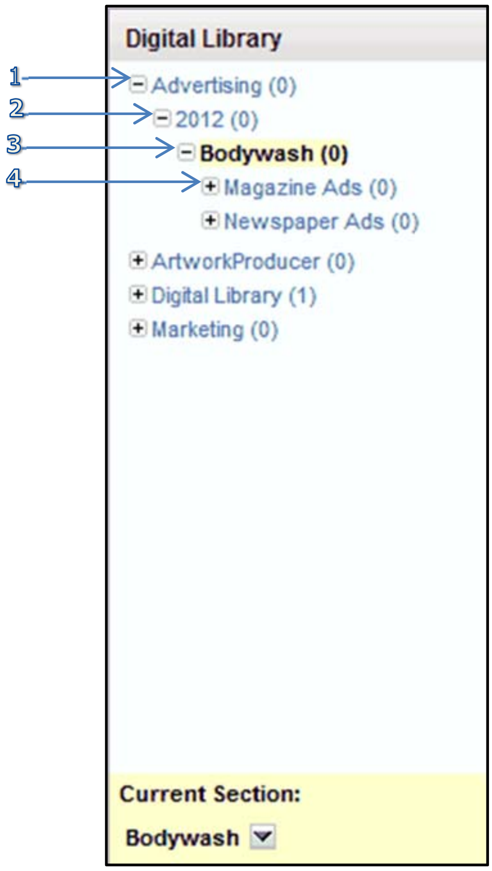


Asset Organization

In an organisation the digital assets may be arranged in a hierarchy as follows:

1. **Level 1 – Vaults**: The vaults could be created per content type for e.g. advertisements, collateral, packaging, logos, icons and product photos.
2. **Level 2 and further - Sections and Sub-sections**: Each vault could have sections based on the year of creation or product line (Level 2). Further sub-sections could be based on the product name/code name (Level 3), which could further branch out into subtypes based on the type of content (Level 4).

For e.g.:



(1)	**Vault (Level 1) - Advertisements**
(2)	**Section (Level 2) - Year**
(3)	**Sub-section (Level 3) – Product Line/Name**
(4)	**Sub-section (level 4) – Sub Type.**

Figure No.3

Asset Access Levels

Each group can be assigned different access rights in digital library. The access rights and what actions the right allows the group to perform is shown in the following table:

Access rights	View Thumbnail	View MoreInfo	Add Coments	Vew Preview	Dynamic rendering	Download Original	Lock and Freeze	Check In new version	Upload Preview and Thumbnail	Linking Assets	Item Update + Asset Expiry	Edit SearchInfo	Associate Facet to a Section	Change Sort Order	Modify Section Information	Create a new item	Create a new section	Copying Assets	Delete assets	Delete Section	Move Assets	Modify Security Policy
Complete	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Delete	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Create Item	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N
Edit SearchInfo	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Create Version	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N
View Original	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View Preview	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View Thumbnail	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
No Access	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

- The left column (1) has the list of access rights that a group can have in digital library. The rights are arranged in the decreasing order of privileges. For e.g. Group A has the access right for create item this means Group A has all the rights below it such as edit searchinfo, create version and view original etc.
- The top row (2) has the actions that the group can perform in digital library as a result of being assigned a certain access right. For e.g. Group A has view thumbnail access, which means the users in Group A can view thumbnails, view moreinfo of the assets of a section to which the user has access to and add comments to the assets. The user cannot view preview, dynamically render etc.

Notes:

- In case of 'Move Assets': To move an asset from one section to another, the user should have 'Delete' access on the source section and 'Create Item' access on the destination section, if not an error occurs. Once the assets are moved, the cart will be cleared automatically.
- In case of 'Copying Assets': To copy an asset to another section, the user should have 'View Original' access on the source section and 'Create Item' access on the destination section, if not an error occurs. Once the assets are copied, the cart will not be cleared automatically.

15.1.3. Defining a Security Policy

The security policy is defined by the administrator i.e. defining what access rights which group of users has in a policy.

Default Groups available for Security Policies

There are certain default groups for every security policy created in the system. They are:

- **Everyone** – All users/groups, which haven't got explicit access in a policy. Normally 'Everyone' should get 'No Access' so that the administrator can give restricted access to selected groups only and prevent any unauthorized user from having access to any vaults or sections as every user belongs to the group '**Everyone**'.
- **Owner** – The user who creates a section will be the owner of all the contents in the section.

These roles can be given explicit privileges in the security policy and the other groups may be given other access rights based on what actions need to be performed.

Points to consider while defining and applying a Security Policy

- What are the vaults and sections in the digital library?
- What are the groups defined in your system?
- Which group need what access on which vault/section in the digital library at each level in the hierarchy?
- What should be the access given to all other users/ groups which haven't got access explicitly i.e. access for 'Everyone'?
- Who is the owner of the section to which the policy is being applied and what should be the Owner's access right?

15.1.4. Applying a Security Policy

Once the policy is defined, it has to be applied on a vault or section by the administrator.

- A vault or section can have only one security policy applied on it.
- The policy may include multiple groups of users each group having a different access right on the vault or section.
- Based on their access rights on the vault or section the users of the group will or will not be allowed to perform certain actions on the vault or section.

Levels of sections to which a policy can be applied

A policy can be applied to one of the following:

1. The current selected section only and not its sub-sections.
2. The current selected section and its immediate sub-sections.
3. The current selected section and all the sub-sections and the tree below.

Points to remember while applying a Security Policy

Case 1: If a user belongs to multiple groups then as a member of different groups, the user gets different access rights on the same section or vault. The system will allow the user to get the highest of all the access rights that apply to the user.

For e.g.: If User1 belongs to Group1 and to Group 2. Group1 has view original access to Section 1 and Group2 has view thumbnail access to Section 1 then User 1 will get view original access to the section as it has a higher access right.

Case 2: The no access right is lowest access right**.**

For e.g.: If User1 belongs to Group1 and to Group 2. Group1 has no Access to Section 1 and Group2 has view thumbnail access to Section 1 then User 1 will get view thumbnail access to the section as it has a higher access right despite the fact that User 1 has no access as a member of Group1.

Case 3: Providing access to the users in a hierarchy of sections: An user requires access at all higher levels in the hierarchy of sections to be able to access the lower level sections in the digital library.

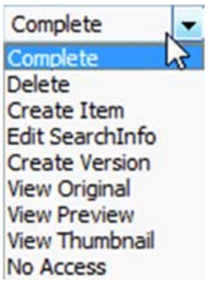
For e.g.: If there is a hierarchy of sections in digital library - Product Name→Images →High Res and the user has no access on the Images section while having the view original access on the High Res section, then the user will not be able to navigate through the hierarchy to this section but will be able to search on the High Res section contents through the simple/advanced search facility. Further if the user tries to search and then navigate to the parent section, the user will not get access to view the parent section.

Configuring Security Policies for a Tenant

Click on the '**Security Policies**' link on the left pane under '**Administration**'. A list of security policies with its name and description are displayed. Click on the '**Delete**' button to delete a selected security policy. To create a new security policy click on the '**Create**' button. Enter the following details **(Figure 3)**:

- **Name** – The name of the security policy.
- **Description** – The description.

- **Owner Permission** – Select the permission for the owner of the asset. By default the user who creates/uploads the asset in Digital Library becomes the owner of the asset.
- **Everyone Permission** – This is the permission given to the all the users of the system.
- **Group Permission** – The administrator can select the group and set access level for each user group from the drop down list (table below). The administrator can add groups or delete the groups by clicking on the 'Add Group' or the 'Delete' respectively.

	**Complete** – Gives complete access to the user including changing the security policy.
	Delete – The user can delete an asset and has all the rights mentioned below.
	Create Item – The user can upload an asset and has all the rights mentioned below.
	Edit SearchInfo – The user is allowed to edit the search information and has all the rights mentioned below.
	Create Version – The user is allowed to create a version of an asset and has all the rights mentioned below.
	View Original – The user can view the original file and has all the rights mentioned below.
	View Preview - The user can view the preview and has all the rights mentioned below.
	View Thumbnail – The user can view the thumbnail.
	No Access – The user has no access to the asset/section/vault.

By clicking on the  button Access details can be viewed **(Figure 4)**.

To save the security policy click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button.

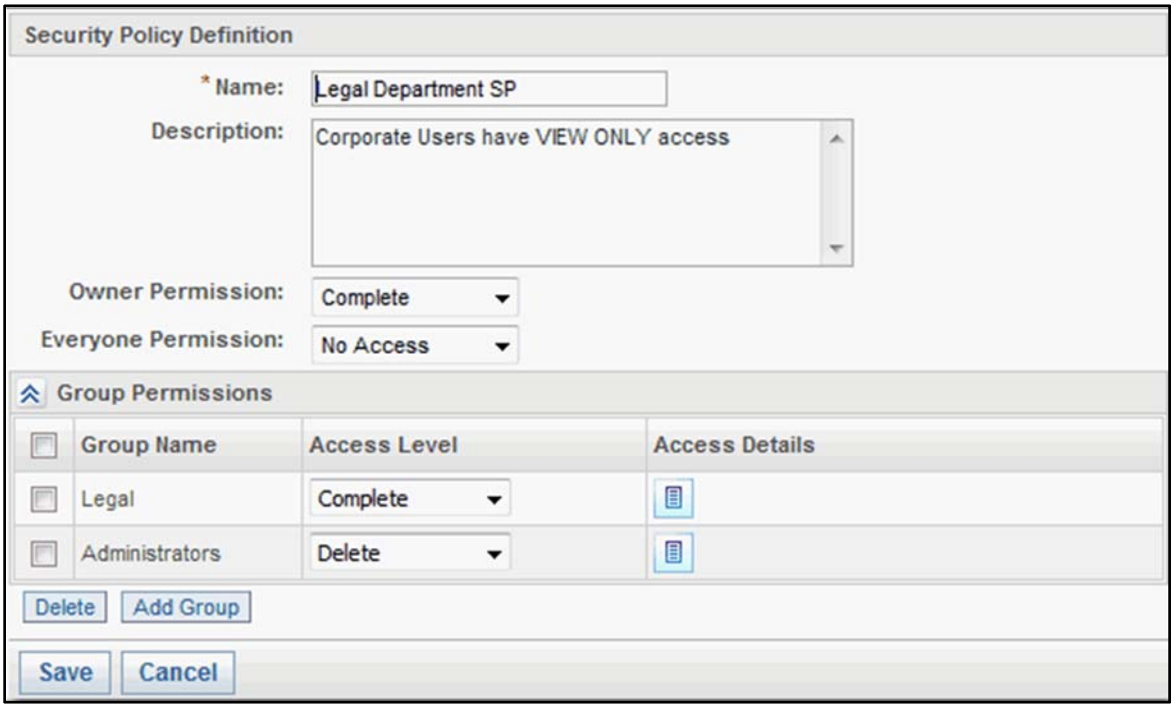


Figure No.4

What is Default Security Policy (Defaut_SP)

This is a default security policy created in the system that gives, by default, everyone and owner complete access. This security policy can be applied to vaults or sections where all the groups should get all rights.

However this policy can be altered to prevent any user from creating extraneous folder structure, which has not been approved by the administrator.

15.1.5. Settings

Click on the '**Settings**' link on the left pane under '**Administration**'. The administrator can set default behavior of the digital library solution through the settings tool and default values for selected interaction as described below:

- **Layout** – The section content screen can be viewed in a grid or list view. The administrator can set the default layout of thumbnails of the assets and the default number of rows and columns for the list and the grid view. Business information layout can be set either to a single column or a double column.
- **Sort** – Based on the default preferences set by the administrator the application sorts the vaults, sections, collections and assets by name, date created or popularity. The sorting order can also be in ascending or descending.
- **Search Result** – The default value for the maximum number of assets to be returned in a search can be set.
- **E-mail Notification** – The default value for the E-mail validity period in days is set by the administrator.
- **Vault** – The default disk space available for vaults created in Digital Library can be set.
- **Terms and Conditions** – The setting for the terms and conditions can be done. This works in combination with 'Audits Setting' done in the tenant settings. If the setting is 'Yes' then there are 3 options:

  Note: Use of images for the terms and conditions is not supported.

  - Text – A text area where the text for the terms and conditions can be entered is provided.
  - File – A file can be uploaded for the term and conditions. The files can be of type PDF and HTML.
  - None – If this option is selected it means that the setting is on but there is no default terms and conditions. It can be set for each vault while creating the vault.
- **Reason for download** – Whether to track the reason for download or not can be set here. If the setting is selected as yes then for every download of asset the application asks the user to specify reason for downloading an asset. This works in combination with 'Audits Setting' done in the tenant settings.

To save the settings click on the '**Save**' button and to cancel the operation click on the '**Cancel**' button **(Figure 5)**.

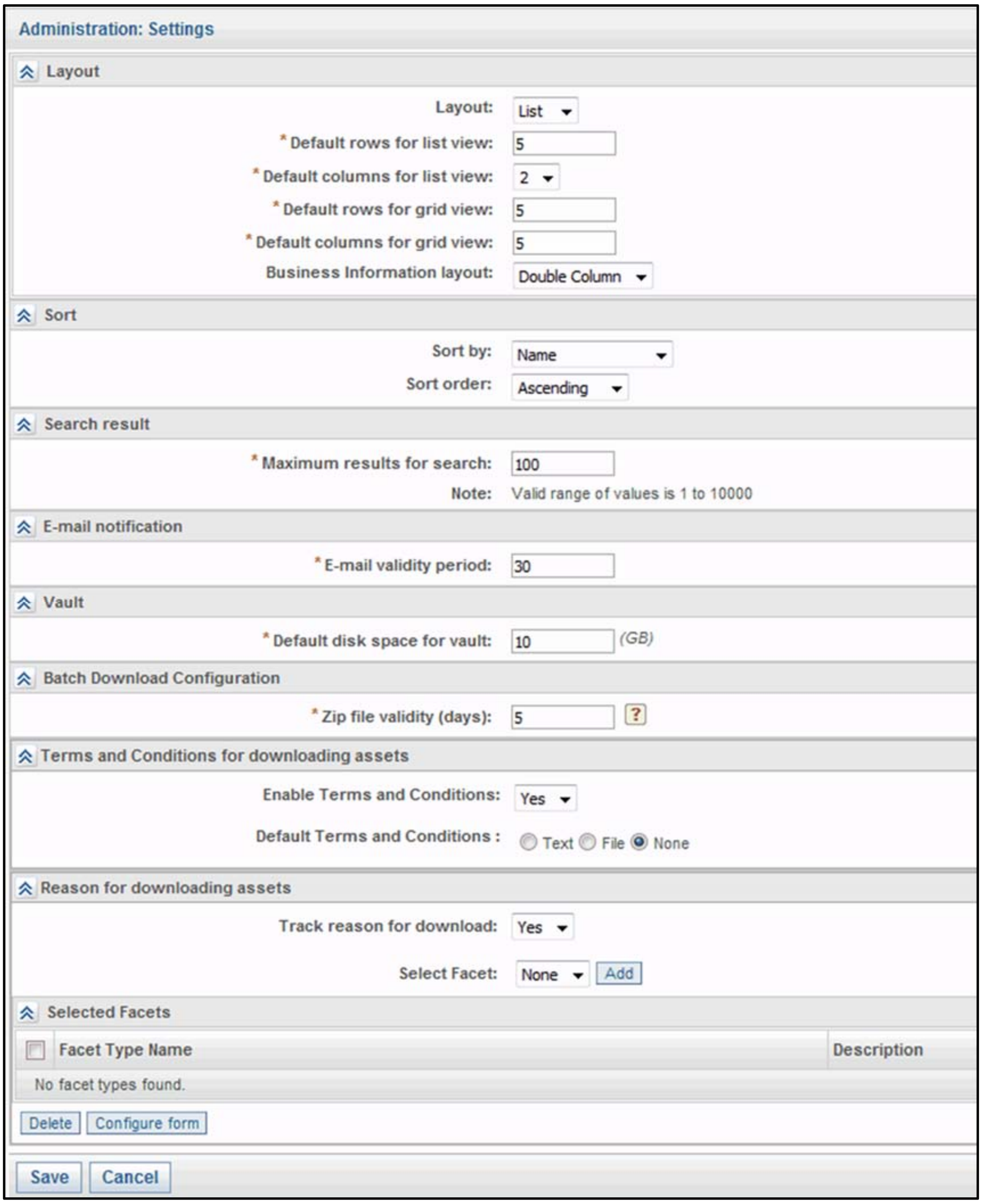


Figure No.5

15.2. Asset Descriptor

When the assets/collections are laid out in the list view additional information related to the assets/collections can be shown next to it. The asset descriptor application allows the administrator to select the asset attributes from the asset technical and business information **(Figure6**

Click on the '**Asset Descriptor**' link on the left pane under '**Administration**'. The asset descriptor application screen has the following sections:

- **Configure Asset Descriptor** – Select either the assets or a collection for which the attributes are to be displayed. Select the source from where the attributes can be selected. The facets created and associated with the 'DIGITALASSET' entity can be selected here. See **section 10.2.1**.
- **Selected Attributes** - The selected attributes will be displayed here. The attribute name and the source will be displayed. Additionally these attributes can be provided with formatting information such as bold, italic and the color can be changed. The preview will be displayed.
- **Select Attributes** – A list of attributes from either the selected facet or the digital asset is displayed. The attributes are displayed with the attribute name and description from the selected source. The attributes to be displayed can be selected by clicking on the checkbox next to the attribute name and then clicking on the '**Select**' button.

After selecting the attributes save the settings by clicking on the '**Save**' button or to cancel the operation click on the '**Cancel**' button.

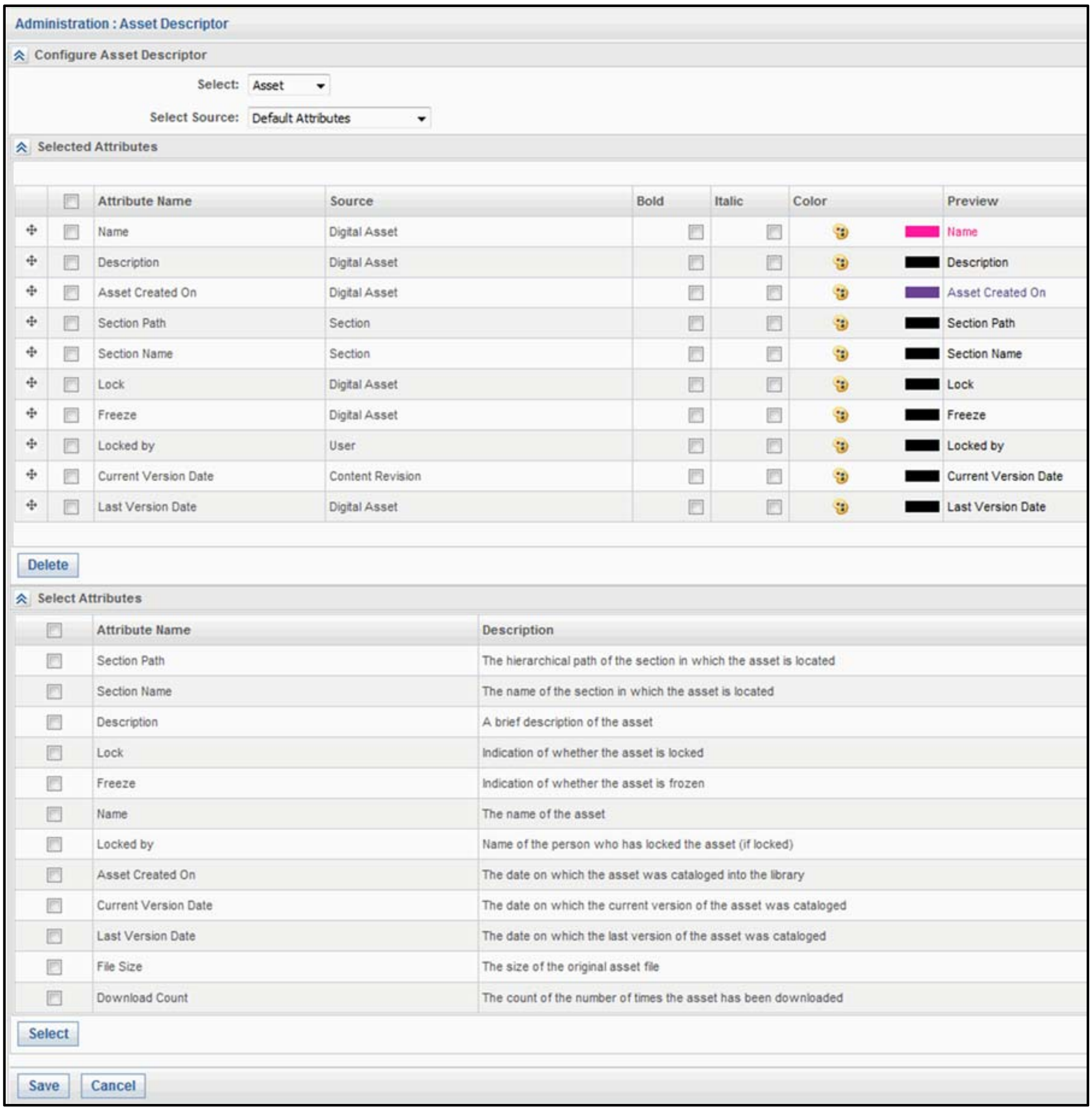


Figure No.6

15.2.1. Configuring Facets for Digital Assets

Additional business information can be associated with a digital asset by associating a facet with the information. To associate a facet with as entity the following steps should be carried out:

- Create the Facet (See Schema Designer) and describe the attributes and the named hierarchy if any for the Facet **(Figure 7)**.

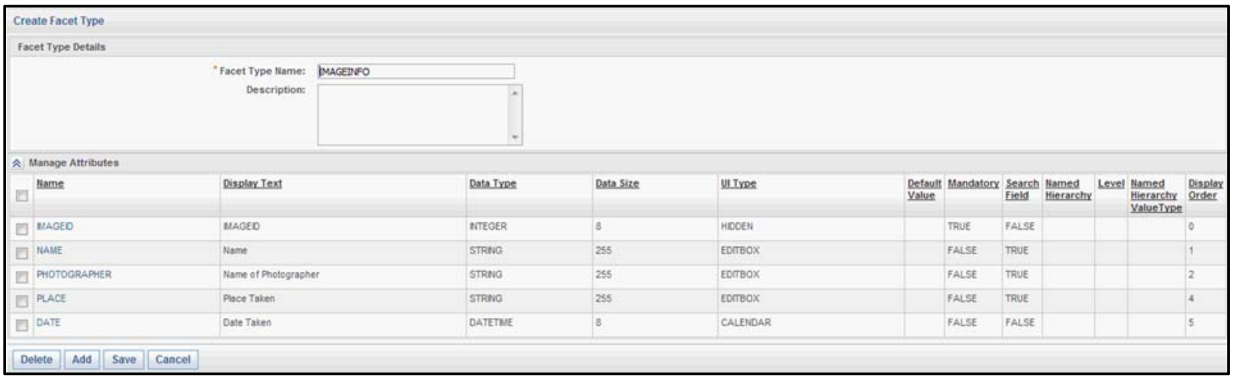


Figure No.7

- Associate the newly created Facet (See Schema Designer) with the 'DIGITALASSET' entity making sure that the association name given is DIGITALASSET_<Facet Name>, where the facet name should be the name of the facet e.g. if the Facet name is "IMAGEINFO" then the association name is 'DIGITALASSET_IMAGEINFO' **(Figure 6)**. For associating the facet with a section the association name given is SECTION_<Facet Name>.

Figure No.8

Note: Make sure the facet name, attribute name and the association name is in upper case without any space.

- When a facet is associated with a digital asset/section, a form is created which is displayed during adding/displaying of facet for an asset/section. This form has a predefined layout, which can be changed using the 'UI Configuration' utility.

15.3. Recycle Bin

The assets deleted by the user, are transferred to the recycle bin.

Click on the '**Recycle Bin**' link on the left pane under '**Administration**'. The following operations can be performed by the administrator **(Figure 9)**:

- **Delete Permanently** – The admin/any user from the admin group can select one or multiple assets and delete them permanently.
- **Restore** – Restore the assets in the recycle bin.
- **Empty Recycle Bin** – All the assets in the recycle bin can be deleted permanently.

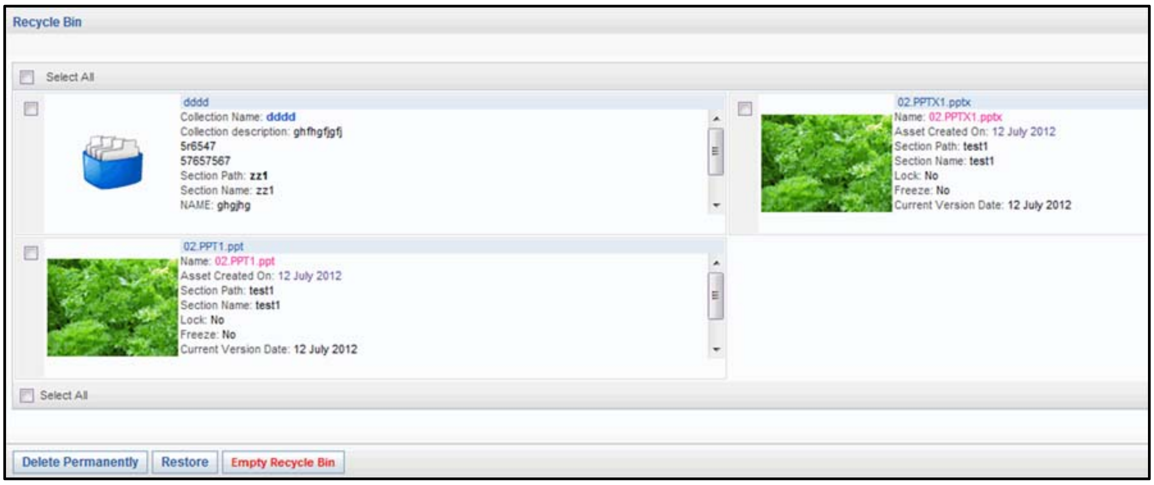


Figure No.9

Note: Once the admin deletes the assets in the recycle bin they are not deleted immediately. There is a background service to handle the deletion of the contents. This background service takes care of deleting the contents as well as updating the vault's total used disk space. The assets will be cleared from the file system when the scheduled task runs at the appointed time. The system clears the recycle bin and the end user/admin can't see the deleted assets anywhere in the system or on that machine.

15.4. Asset Metadata Report Configuration

Digital assets have metadata associated with them. Metadata includes system information, business information, version history, comments etc. Asset Metadata report helps to export all this metadata into a report in a printable format. In Digital Library solution the 'Asset Metadata' report is available from the following screens:
Section Cart, Simple Search, Advanced Search and Revive Asset. This report can be printed either in Pdf or Xls format by the end user.
By clicking on the '**Asset Metadata Report Configuration**' on the left pane under administration, the template list is displayed **(Figure 9)**. A template is a preconfigured layout. The end user is able to configure this using the 'Asset Metadata Template Configuration' utility.

Figure No.10

To add templates click on the '**Add**' button. An asset metadata template screen is displayed **(Figure 10)**. The following information needs to be filled in:

- Template Name and Description.
- **Publish Template** – If selected then the template will be visible to the end user.

- **Allow Field Omission** – If selected the end user will be allowed to select the fields to be displayed in the report.
- **Asset Summary** – All fields can be selected to be displayed on the report. If the administrator selects a few fields then the end user can only select from these fields.
- **Business Information** – The facets which are associated with the assets and need to be displayed on the report can be selected.

  Select the facet and click on the 'Add' button to add it. After the facet is selected configure the form by clicking on the 'Configure form' button.
- **Version** – Select the fields to be displayed on the form.

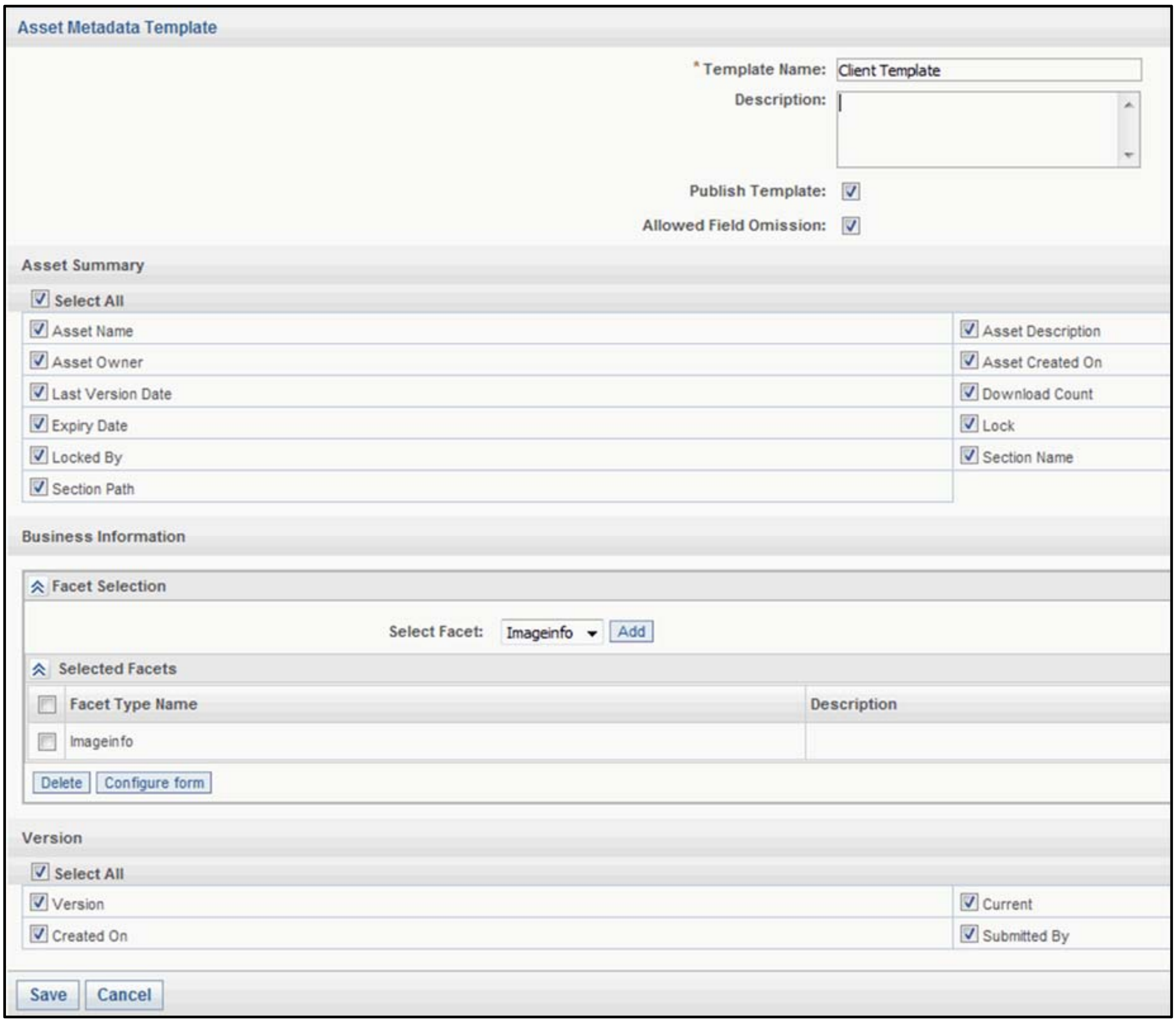


Figure No.11

16. Digital Asset Finder (DAF)

16.1. Overview

Digital library provides facility to store assets along with their business information in vaults and folder hierarchy. Many a times its difficult to drill down the hierarchy and search for the assets. A DAF is pre-configured search for assets that could be displayed in the left task pane of the SAS Marketing Operations Management system. It also allows the administrator to create predefined search configuration to facilitate searches on digital library for retrieval of assets. These predefined configurations can be then embedded in solutions like site builder, where the user can search by providing keywords to search and retrieve assets which specify certain criteria.

16.2. Getting Started

After signing in click on the '**Digital Asset Finder**' link on the left pane under the '**Administration**' section. By default s list of configured digital asset finder queries is displayed with the name and description. To preview or edit a digital asset finder query click on the icon or the icon respectively.

To create new queries click on the '**Create**' button. To delete a selected query click on the '**Delete**' button **(Figure 1).**

Figure No.1

16.3. Creating a Digital Asset Finder (DAF) Query

To create a new DAF query, click on the '**Create**' button **(Figure 1)**. A screen with the following sections is displayed **(Figure 2)**:

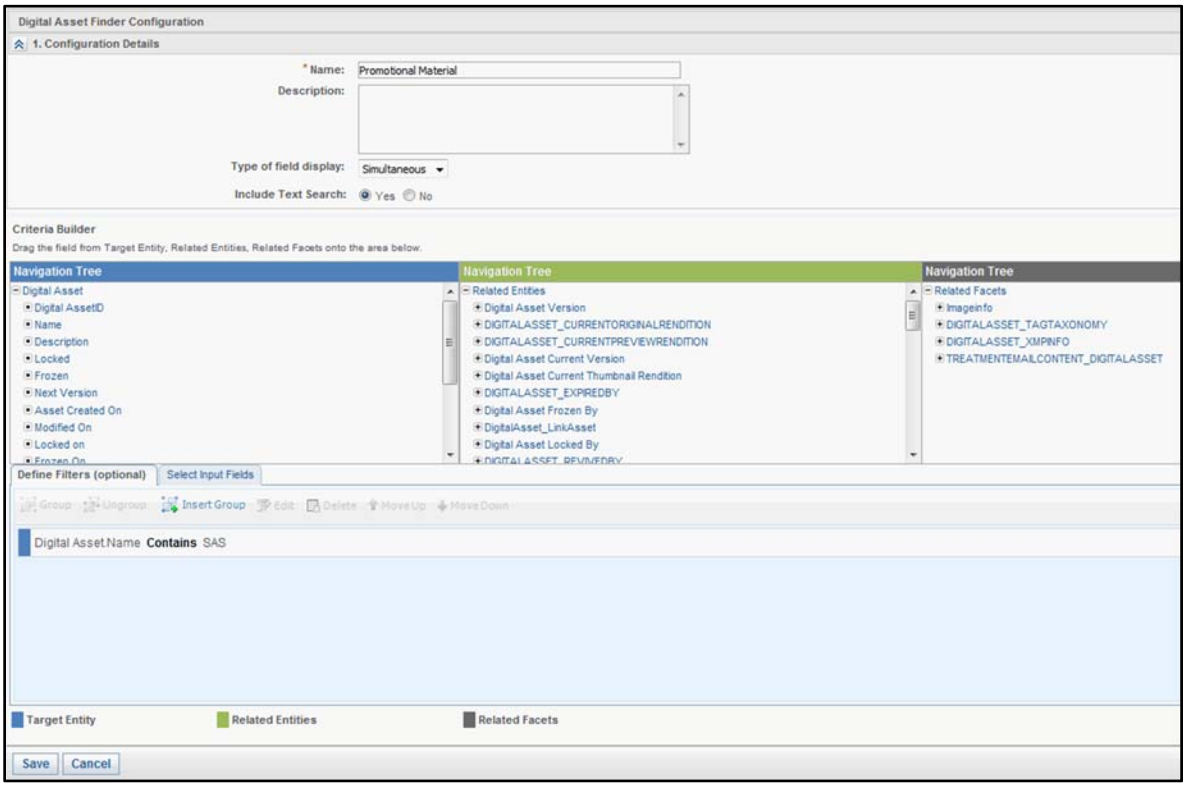


Figure No.2

Configuration Details:

- **Name and Description** – The configuration name and description.
- **Type of field display** – Select whether the display of the fields is sequential or simultaneous.
- **Include Text Search** – Select whether to include a text search.
- **Criteria Builder** – The criteria for displaying assets with information can be built using the Target Entity, Related Entity and Related Facets. The following can be defined:
  - **Define Filters** - The default search filter can be specified, which will be applied along with the search criteria, specified during runtime by the end user. Drag and drop the Click on the 'Add Filter' button to add a filter clause. A selected filter can be deleted by clicking on the 'Delete' button. To clear all the filters from this section click on the 'Clear All' button. To add expired assets from the digital library an additional filter needs to be added.
  - **Select Input Fields** – Select the attributes/fields for which the end user can specify keywords for searching for the digital assets. Click on the 'Add Field' button to add fields to the configuration. To delete a selected field click on the 'Delete' button. To clear all the fields from this section click on the 'Clear All' button.

To save the new configuration, click on the '**Save**' button or to cancel click on the '**Cancel**' button **(Figure 2)**.

16.4. Configuring an Application

To configure an application for which the link will be visible on the left pane of the dashboard screen, click on the '**Configure Application**' link on the left pane **(Figure 1)**. A list of configured applications is displayed.

Figure No.3

To create a new application click on the '**Create**' button **(Figure 3)**. An application definition screen with the following sections is displayed **(Figure 4)**:

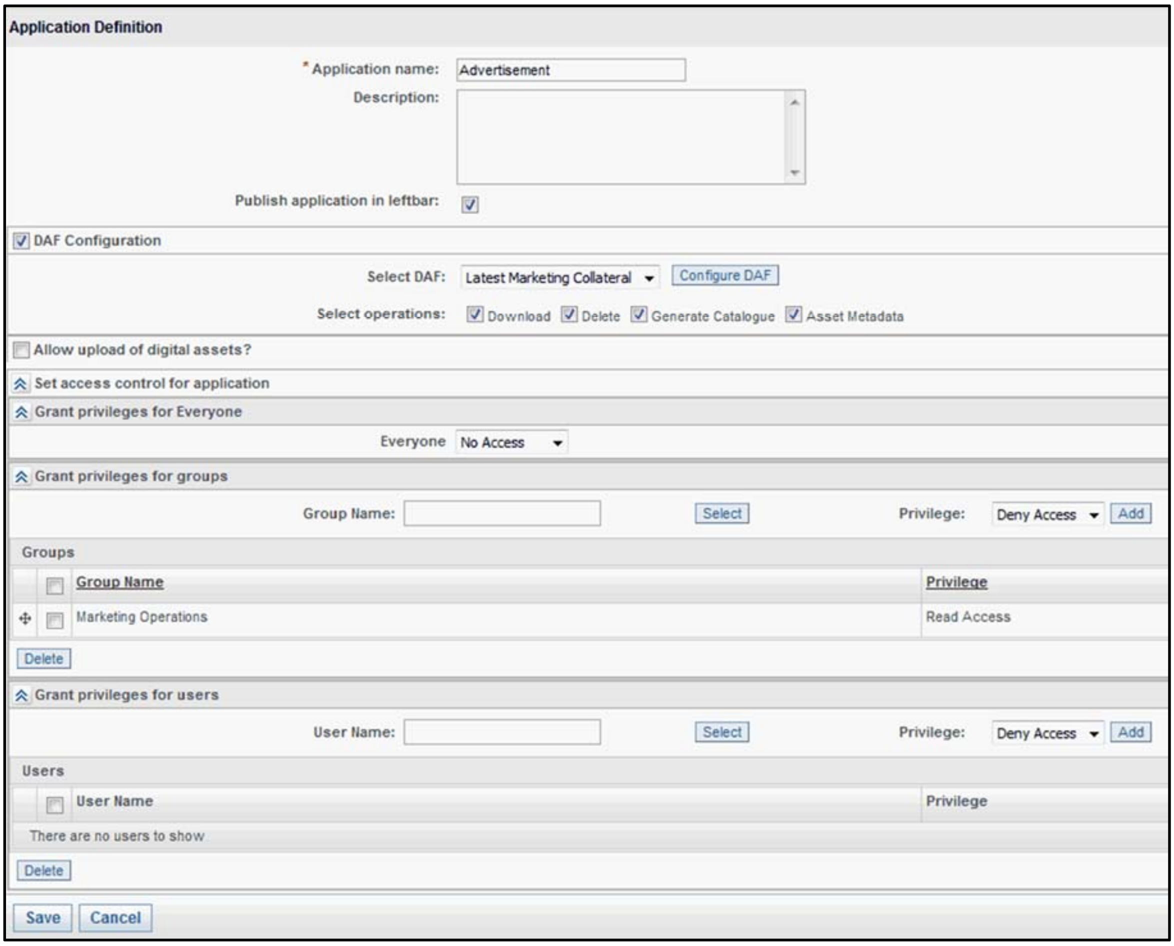


Figure No.4

Configuration Details:

- **Application Name and Description** – The configuration name and description.
- **Publish application in leftbar** – If selected then the configured application will be visible on the left bar of the dashboard screen.

DAF Configuration: If selected

- **Select DAF** – Select the digital asset finder query present in the system. If not, a new query can be configured by clicking on the '**Configure DAF**' button.
- **Select Operations** – Select whether the download, delete, generate catalog and asset metadata operations are allowed to be done by the end-user.
- **Allow upload of digital assets** – If this option is selected then the user can upload assets. The following section is visible on the application definition screen **(Figure 5)**. The following operations can be done in this section:
    - o **Select facet**: Metadata can be associated with an asset by selecting a facet and a creating a form.
    - o **Select target section for uploading assets**: A fixed path for uploading assets can be selected. This allows a fixed path (chosen section) for cataloging and also allows constructing a variable location based on Meta information selected for the asset.

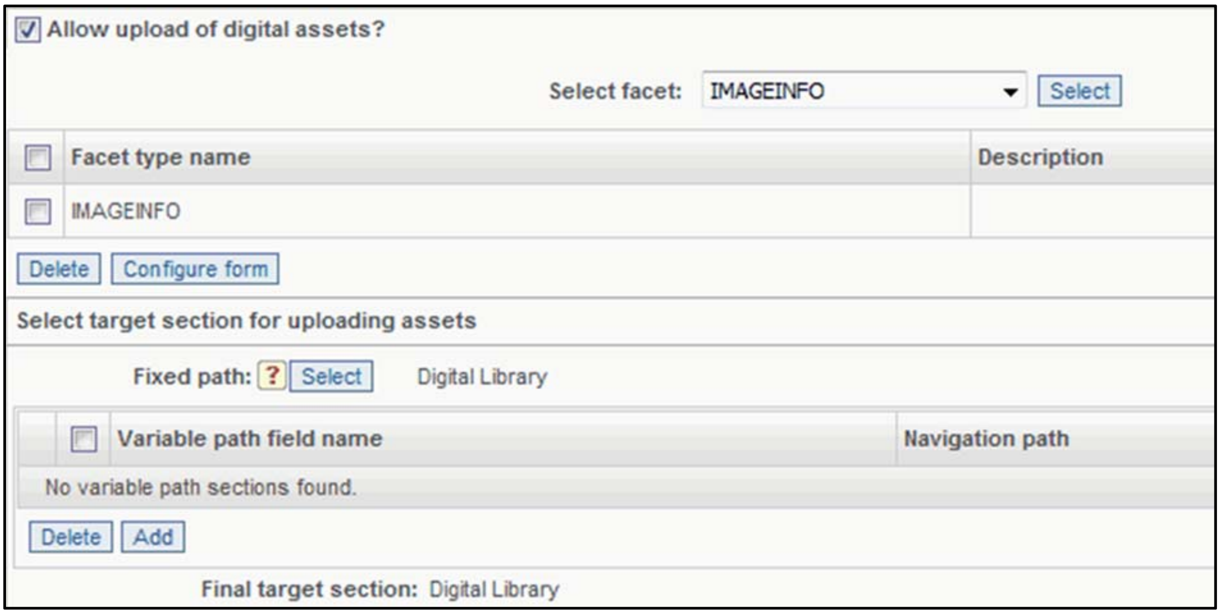


Figure No.5

Set access control for applications:

- **Grant privileges for everyone** – Select the options from the dropdown list.
- **Grant privileges for groups** – Select the groups and grant them privileges.
- **Grant privileges for users** – Select the users and grant them privileges.

To save the new application configuration, click on the '**Save**' button or to cancel click on the '**Cancel**' button **(Figure 4)**.

17. Report Configuration

17.1. Getting Started

After signing in click on the '**Reports Configuration**' link on the left pane under '**Administration**'. By default the Strategic Planner reports are displayed **(Figure 1)**.

Figure No.1

Reports for each solution can be viewed by clicking on the respective links on the left pane **(Figure 1)**.

17.2. Adding, Updating and Viewing Reports

Each row in the list displays a report name and description. To view or edit a report, click on the '**View**' or '**Edit**' links respectively. To delete a report select it and click on the '**Delete**' button. To add a new report click on the '**Add**' button **(Figure 1)**.

17.2.1. Adding a New Report

Click on the '**Add**' button to add a new report. The following details can be entered on the configure report screen **(Figure 2)**:

- **Report Name** - The report name (Mandatory).
- **Report Category** – Select the report category from the drop down list **(Figure 2)**.
- **Report Description** – The description of the report.
- **RPT File Name** – Specify the report file name (Mandatory). A report file is created in a crystal report designer.
- **Input Screen XML File** - Browse and upload the input screen XML file. An input screen XML file is a well-defined structured XML file understood by the system and used to define parameters required for displaying a report.

To save the new report click on the '**Submit**' button or to cancel, click on the '**Cancel**' button **(Figure 2)**.

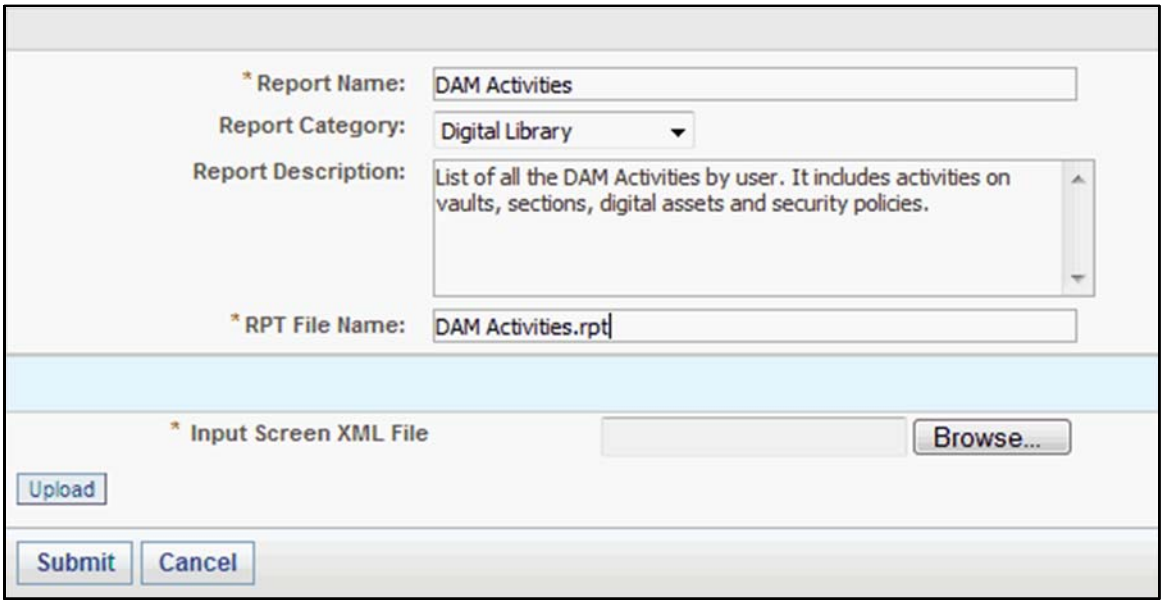


Figure No.2

17.2.2. Editing a Report

On the report configuration screen **(Figure 1)**, click on the '**Edit**' link next to the report name. On the update configured report **(Figure 3)** the following details can be edited:

- **Report Category** – Select the report category from the drop down list **(Figure 3)**.
- **Report Description** – The description of the Report.
- **Report File Name** – The Report file name.
- **Input Screen XML File** - An existing input XML file can be replaced by browsing and uploading a new or updated input screen XML file.
- **Grant privileges for everyone** – A read or no access can be specified for everyone.
- **Grant privileges for groups/users** – The groups/users can be selected for whom the privileges could be deny access; no access or read access can be specified.

To save the edited details click on the '**Update**' button or to cancel, click on the '**Cancel**' button **(Figure 3)**.

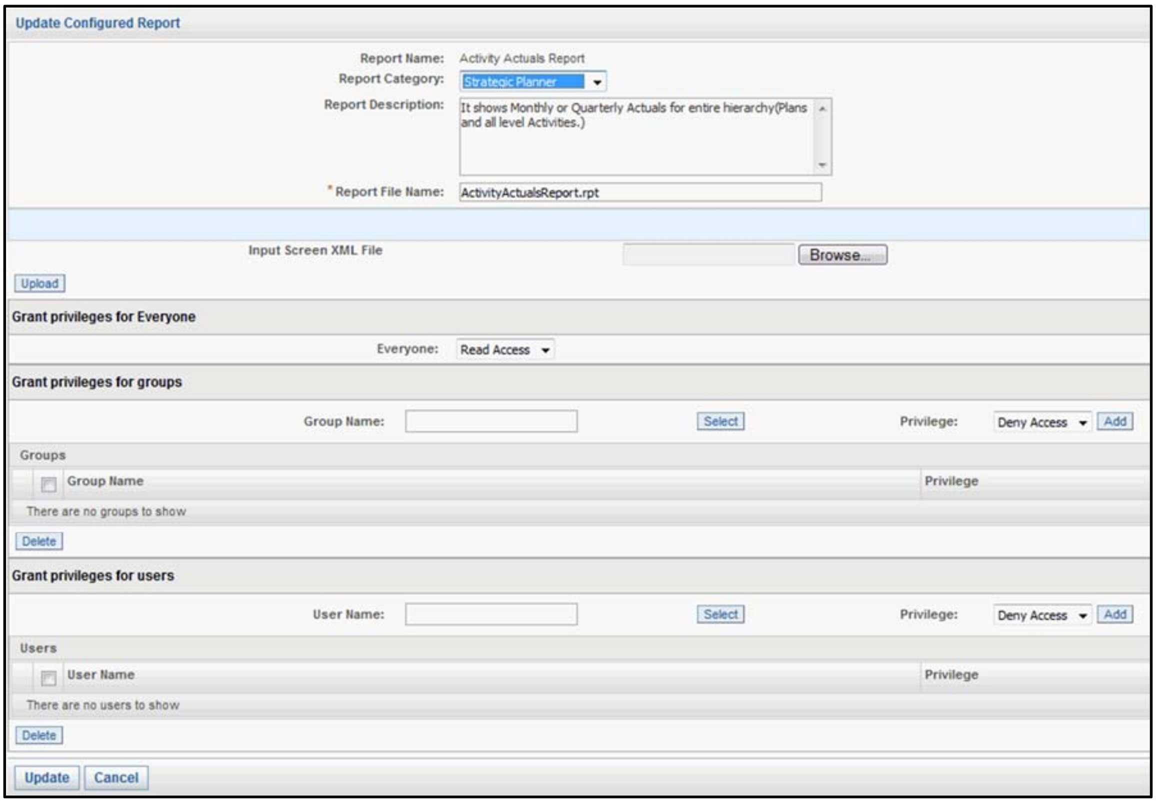


Figure No.3

17.2.3. View a Report

Click on the '**View**' link to launch the report filter screen, which allows the administrator to specify filter criteria for the data to be displayed on the report **(Figure 4)**.

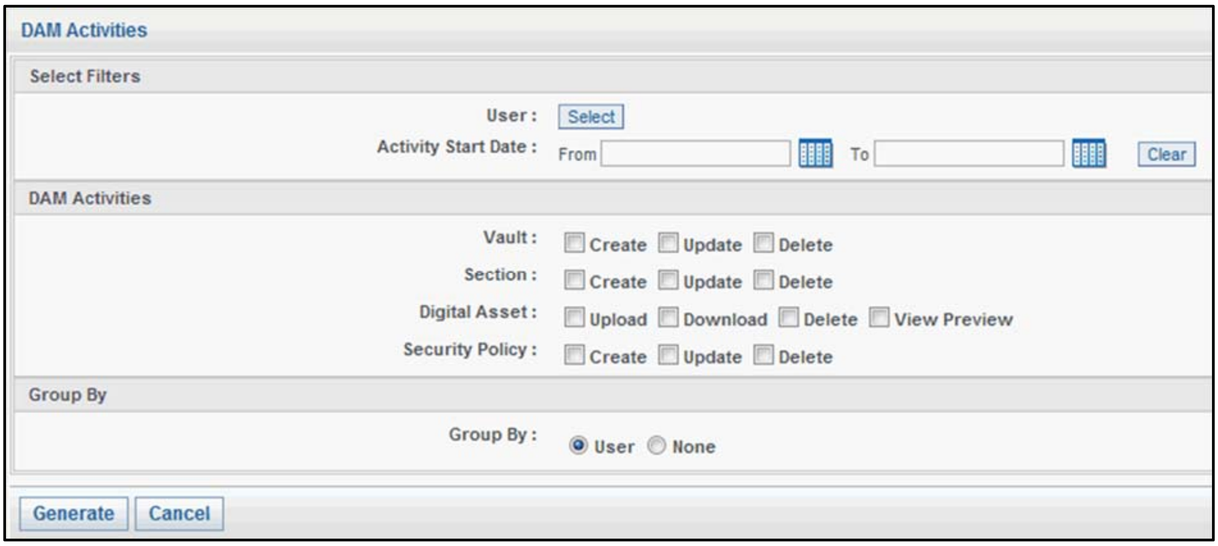
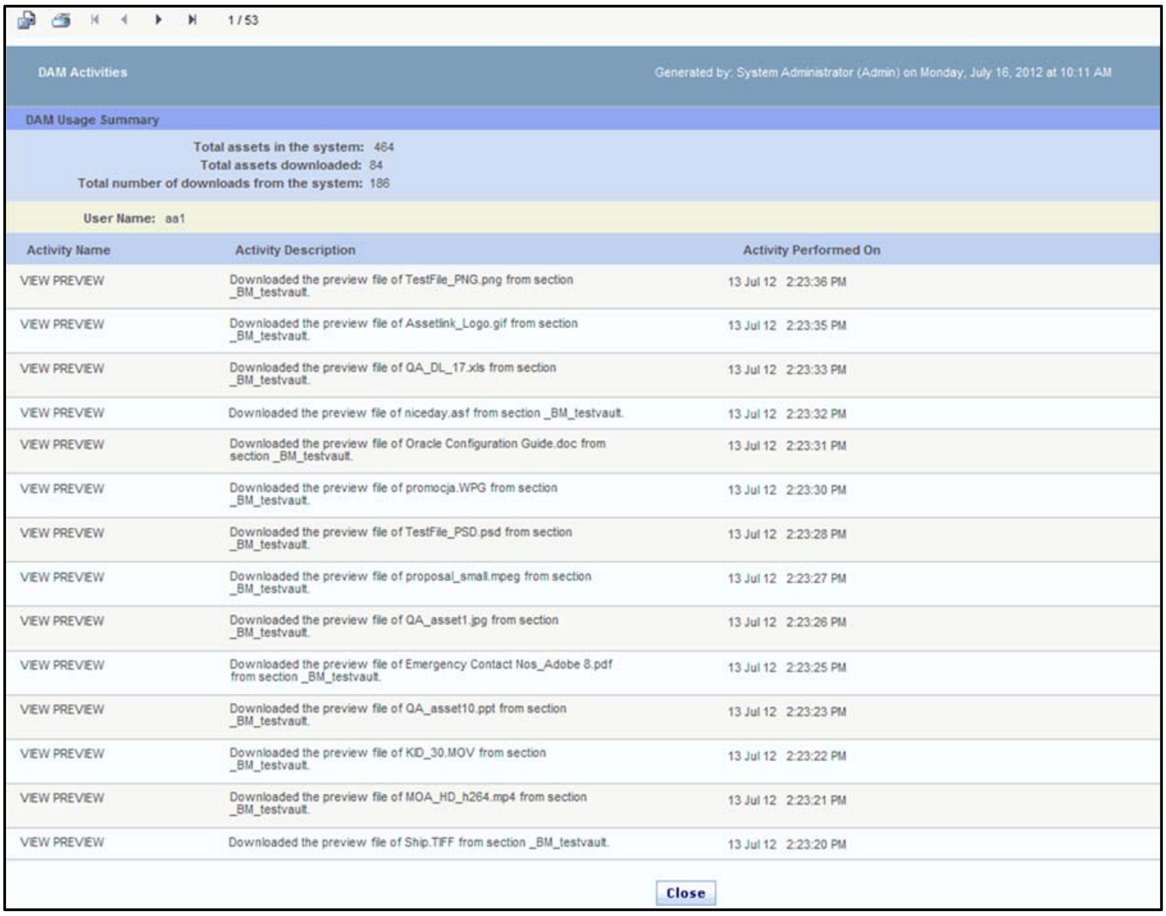


Figure No.4

Once the filter criteria is specified click on the '**Generate**' button to display the report **(Figure 5).**



1 / 53

DAM Activities

Generated by: System Administrator (Admin) on Monday, July 16, 2012 at 10:11 AM

DAM Usage Summary

Total assets in the system: 464
Total assets downloaded: 84
Total number of downloads from the system: 186

User Name: aa1

Activity Name	Activity Description	Activity Performed On
VIEW PREVIEW	Downloaded the preview file of TestFile_PNG.png from section _BM_testvault.	13 Jul 12 2:23:36 PM
VIEW PREVIEW	Downloaded the preview file of Assetlink_Logo.gif from section _BM_testvault.	13 Jul 12 2:23:35 PM
VIEW PREVIEW	Downloaded the preview file of QA_DL_17.xls from section _BM_testvault.	13 Jul 12 2:23:33 PM
VIEW PREVIEW	Downloaded the preview file of niceday.asf from section _BM_testvault.	13 Jul 12 2:23:32 PM
VIEW PREVIEW	Downloaded the preview file of Oracle Configuration Guide.doc from section _BM_testvault.	13 Jul 12 2:23:31 PM
VIEW PREVIEW	Downloaded the preview file of promocja.WPG from section _BM_testvault.	13 Jul 12 2:23:30 PM
VIEW PREVIEW	Downloaded the preview file of TestFile_PSD.psd from section _BM_testvault.	13 Jul 12 2:23:28 PM
VIEW PREVIEW	Downloaded the preview file of proposal_small.mpeg from section _BM_testvault.	13 Jul 12 2:23:27 PM
VIEW PREVIEW	Downloaded the preview file of QA_asset1.jpg from section _BM_testvault.	13 Jul 12 2:23:26 PM
VIEW PREVIEW	Downloaded the preview file of Emergency Contact Nos_Adobe 8.pdf from section _BM_testvault.	13 Jul 12 2:23:25 PM
VIEW PREVIEW	Downloaded the preview file of QA_asset10.ppt from section _BM_testvault.	13 Jul 12 2:23:23 PM
VIEW PREVIEW	Downloaded the preview file of KID_30.MOV from section _BM_testvault.	13 Jul 12 2:23:22 PM
VIEW PREVIEW	Downloaded the preview file of MOA_HD_h264.mp4 from section _BM_testvault.	13 Jul 12 2:23:21 PM
VIEW PREVIEW	Downloaded the preview file of Ship.TIFF from section _BM_testvault.	13 Jul 12 2:23:20 PM

Close

Figure No.5

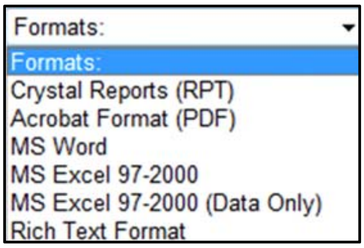
A report usually has a header, which displays information such as:

- Report generator name.
- Date and Time of Generation of the Report.
- Filter Criteria's selected and Report Name.

In case of a multi-page report navigate to the pages using the page navigators.

The following operations can be performed on a report:

- : The report can be exported in the following document formats:



- : The report can be printed.

18. LEFTBAR – Configuration

18.1. Overview

On the left pane links for the various solutions can be set up using the leftbar configuration tool. The end user access to the solutions can be controlled using this tool.

18.2. Getting Started

After signing in click on '**Letfbar Configuration**' link on the left pane under the '**Administration**' section. A list of solutions configured to appear on the left pane is displayed **(Figure 1)**.

Figure No.1

Each row in the list displays the name, type, description and the order of the solution. Access control can be set for these solutions by clicking on the associated links. The standard solutions are divided in four parts which can be expanded to display the solutions/pages under them:

- **MOM**: Has solutions such as dashboard, calendars, strategic planner, offer management, marketing workbench, resource planner, approvals, digital library, knowledge manager, site builder, , artwork producer, timesheets and reports.
- **Administration**: Has solutions such as user management, user registration, dashboard admin, calendar admin, strategic planner admin, offer management admin, workbench admin, resource management admin, settings, digital asset finder, reports configuration, leftbar configuration and the object ID series.
- **Tools**: Has pages such as vendor management and resource management.
- **Configuration**: Has solutions such as schema designer, process designer and UI framework.

Each solution name has a link to edit the solution attributes and the access control definition. Click on the '**Add**' button to add new solutions **(Figure 1)**.
This structure is hierarchical and access control can be configured for each level of hierarchy. Currently only the standard task pane links are visible. This hierarchy can be expanded by each solution to configure links to their individual pages for which access control can be provided. Modules are of three types:

1. **Standard**: Standard SAS Marketing Operations Management modules
2. **Custom**: Custom solutions created by the user
3. **Pages**: These are the actual pages or sub level links in solutions. These links cannot be deleted from the system.

18.2.1. Configuring Leftbar

New solutions can be added to the left pane, solution attributes and access control definitions can be edited.

Adding New Solutions to the Leftbar

Click on the '**Add**' button on the solutions list screen **(Figure 1)** to add new solutions on the left pane. An add solution screen with the following sections is displayed **(Figure 2)**:

- Solution Details – In this section enter the solution name, display name, the application URL (starting with http:// or https ://) and the description. Select whether the application type is external.
- Standard Parameters – Select the standard parameters individually or all. The parameters are user ID, session ID, tenant name and language.
- Grant privileges for Everyone – Everyone could get no access or a read-only access.
- Grant privileges for groups – Select the privileges for a group from the list below:
    - Deny Access – Even if the user/group has access by other entries the deny access can override it.
    - No Access – When a group/user has to be given no access to a particular solution.
    - Read Access

Click on the '**Add**' button to add the privilege.

- Groups – The groups selected will be displayed here.
- Grant privileges for users – Select the privileges for an user from the list below:
    - Deny Access
    - No Access
    - Read Access

Click on the '**Add**' button to add the privilege.

- Users – The users selected will be displayed here.

Click on the '**Save**' button to save the solution attributes and the access control definitions. To cancel the operation, click on the '**Cancel**' button.

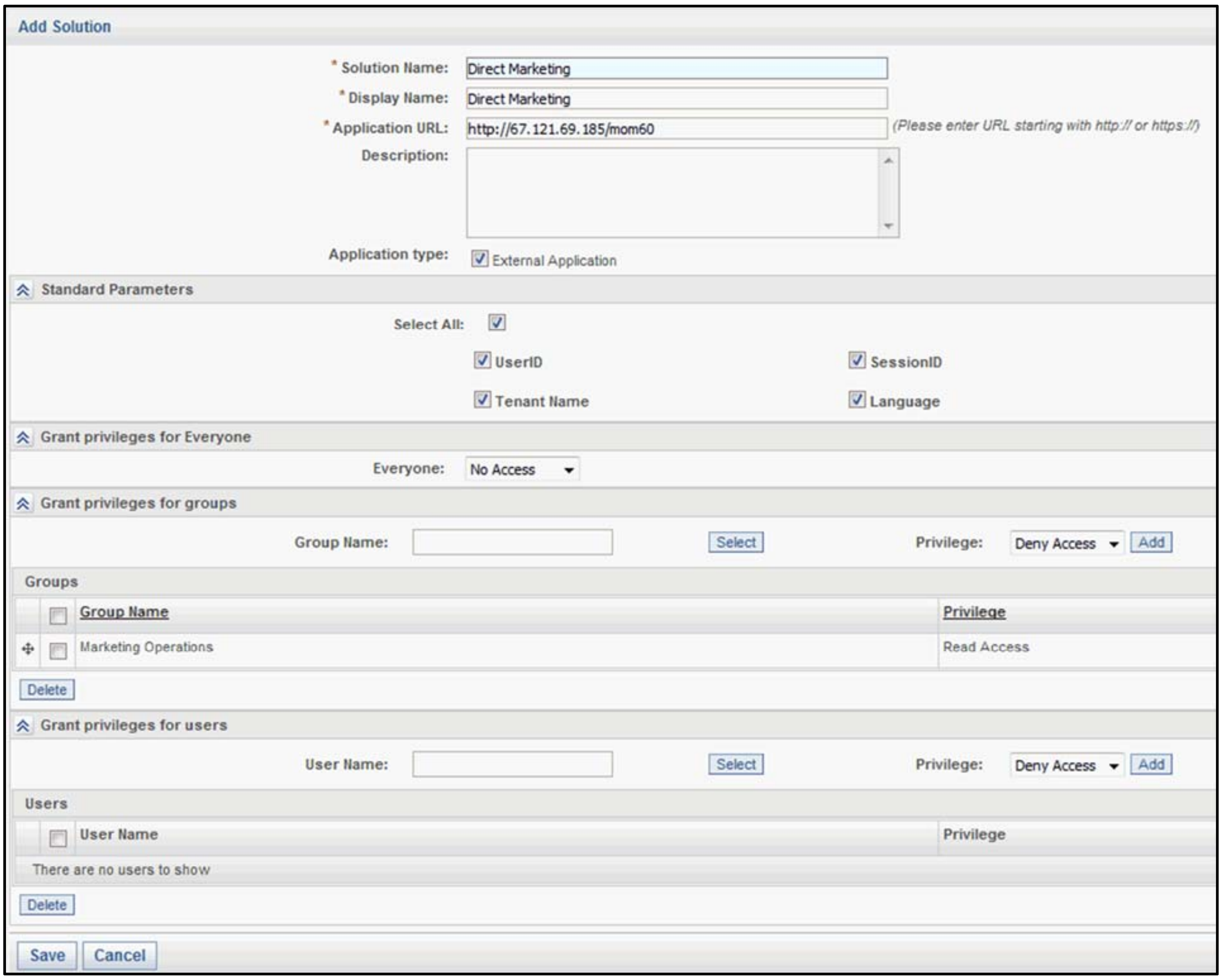


Figure No.2

Editing and Specifying Access Control for the Solutions

The solution attributes and the access control of the solutions under MOM can be edited by clicking on the solution name link. An add solution screen is displayed **(Figure 3)**.

On this screen details similar to the add solution screen **(Figure 2)** can be entered except that the solution name is in the read-only form and cannot be edited. The access control can be edited.

Save the changes made by clicking on the '**Save**' button.

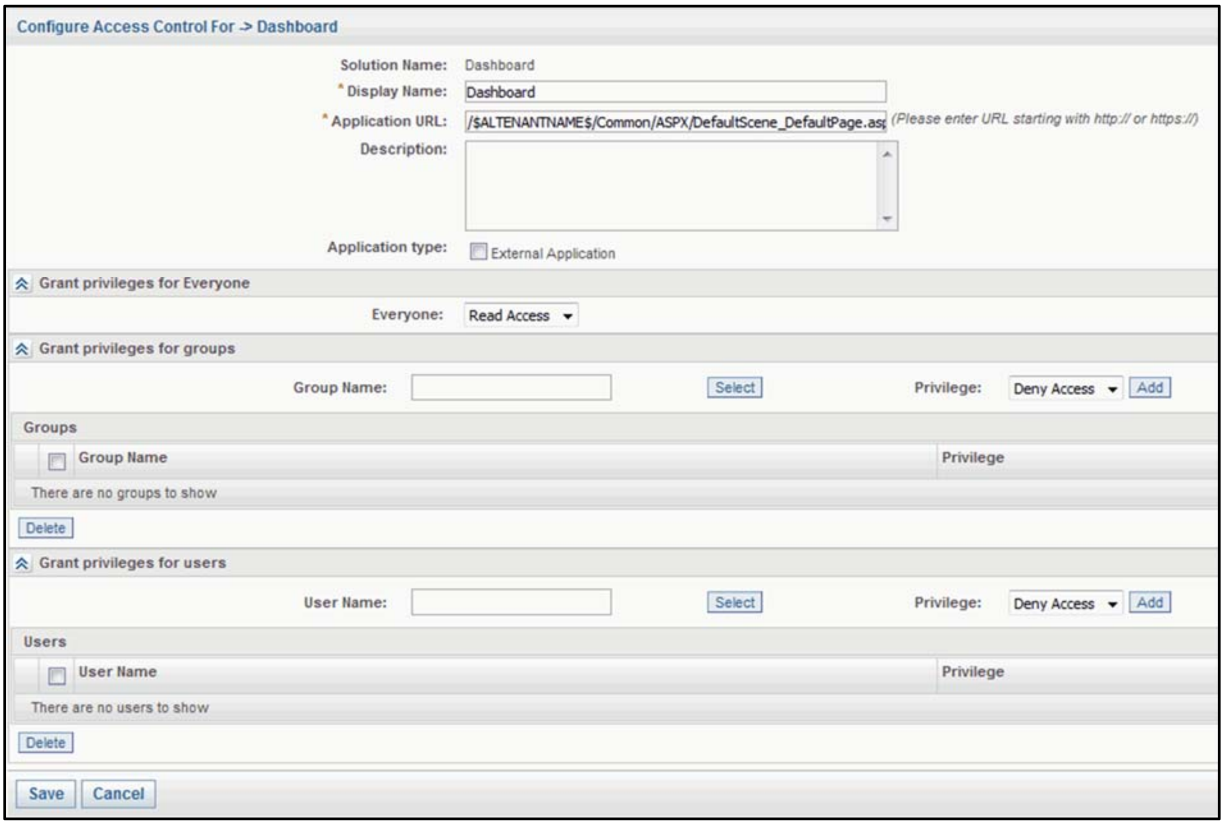


Figure No.3

The pages of some solutions can be configured to allow/deny access to specific users and groups. The Strategic Planner, Marketing Workbench, DAM and Artwork Producer Pages can be configured via the left bar configuration utility.

19. Object ID Series

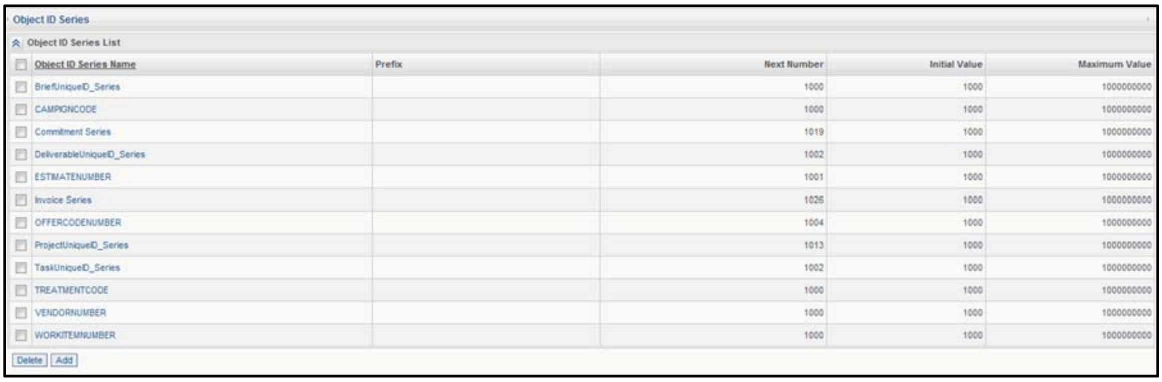
19.1. Overview

In the SAS Marketing Operations Management system certain objects series can be configured for use in the application. An example is an ESTIMATENUMBER series that is present in the system and can be configured for a particular installation of SAS Marketing Operations Management. This Estimate Number series will be displayed in the Estimate Management module.

19.2. Getting Started

The series can be configured by clicking on the '**Object ID Series**' link on the left pane under the administration menu.

A list of Object ID series used in the system is displayed **(Figure 1)** with details such as the object ID series name, prefix, next number, initial value and maximum value. The object ID series can be edited by clicking on the name link.


Object ID Series

Object ID Series List

Object ID Series Name	Prefix	Next Number	Initial Value	Maximum Value
BriefUniqueID_Series		1000	1000	1000000000
CAMPIGNCODE		1000	1000	1000000000
Commitment Series		1019	1000	1000000000
DeliverableUniqueID_Series		1002	1000	1000000000
ESTIMATENUMBER		1001	1000	1000000000
Invoice Series		1026	1000	1000000000
OFFERCODENUMBER		1004	1000	1000000000
ProjectUniqueID_Series		1013	1000	1000000000
TaskUniqueID_Series		1002	1000	1000000000
TREATMENTCODE		1000	1000	1000000000
VENDORNUMBER		1000	1000	1000000000
WORKITEMNUMBER		1000	1000	1000000000

Delete Add

Figure No.1

New object ID series can be added by clicking on the '**Add**' button. An object ID series screen **(Figure 2)** is displayed where the following details need to be entered:

- **Object ID Series name** – The name for the object ID series.
- **Prefix** – The prefix which will appear before the number for the particular series.
- **Delimiter** – The Delimiter will be used as a separator between the prefix and the next number. For e.g. if prefix is specified as Com and the delimiter is # and the next number is 10, then the auto generated number will be Com#10.
- **Initial Value** – The initial value of this series.
- **Increment by** – The incrementing number for this series. For e.g. the commitment number begins with the number 1000 and each new commitment number will be incremented by 1 then the next number will be 1001.
- **Maximum Value** - The maximum value should not be greater than 1000000000.

- **Maximum Number of Digits** - This number specifies the maximum number of digits for the initial value, increment by and the maximum value. This value should not be greater than 10.
- **Reset Rule** – The reset value can be the initial value or zero.

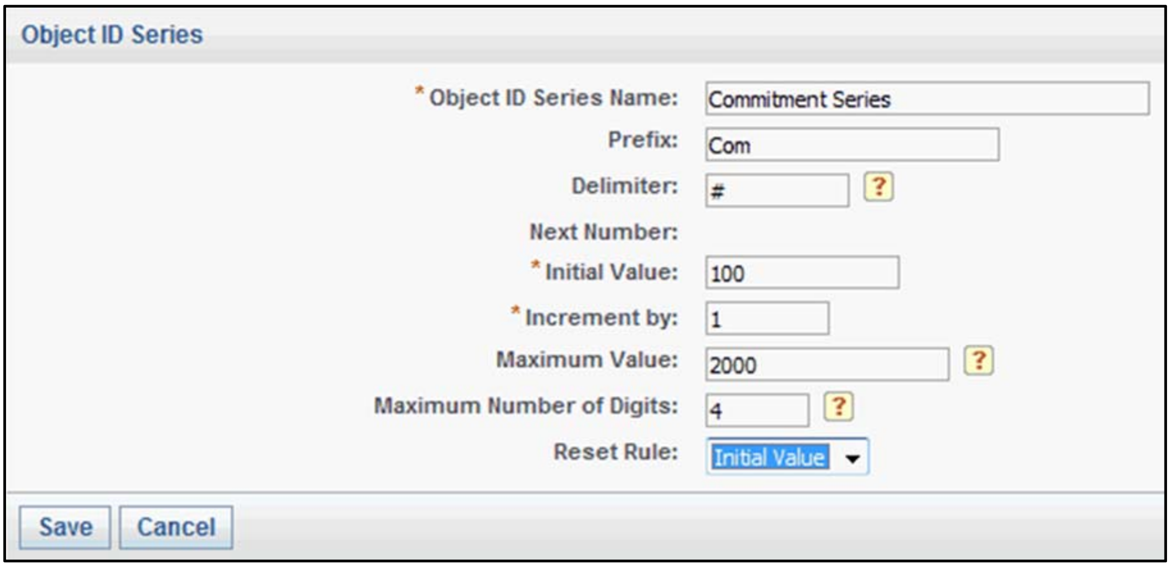


Figure No.2

The Object ID series created here can be pulled on to a form.

20. Routes Configuration

If the 'Show Global Routes' setting is set to 'Yes' in the Approvals/Workbench Admin utility then the routes created using this tool can be used in the Approvals and the Marketing Workbench module. These routes can be created only by the admin and are visible to all the users of the system.

20.1. Getting Started

Routes can be configured from the by clicking on the '**Routes Configuration**' link on the left pane under Administration. A view global routes screen with the existing routes is displayed **(Figure 1)**.

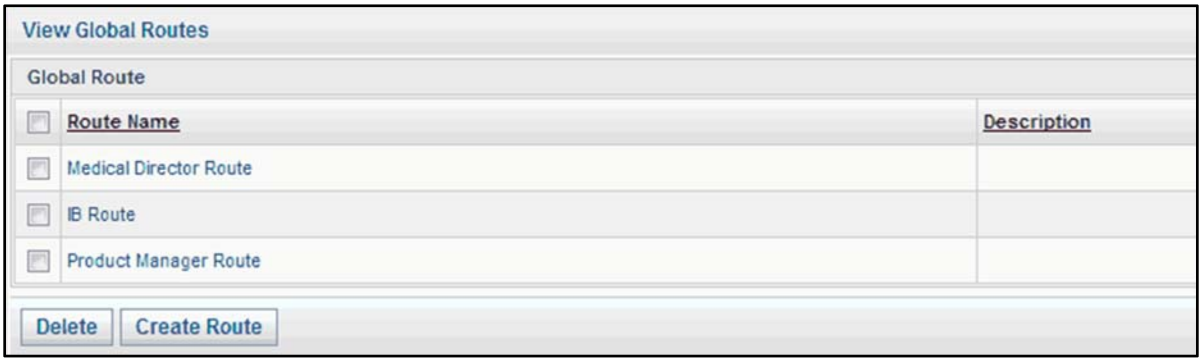


Figure No.1

By clicking on the route name link the existing route can be edited. Create a new route by clicking on the '**Create Route**' button. A create route screen is displayed **(Figure 2)** where the following information can be entered:

- **Route Name and Description**: The name and the description for the route.
- **Approvers**: The members of the route can be selected and the instructions for each approver can be provided in the instructions edit box.
  The '**Cancel Approval if rejected**' box can be selected against each approver if the approval job/workbench task should be cancelled if a particular approver rejects the job/task.
  The duration for the job/task can be specified against each approver.

The route can be saved by clicking on the '**Save Route**' button.

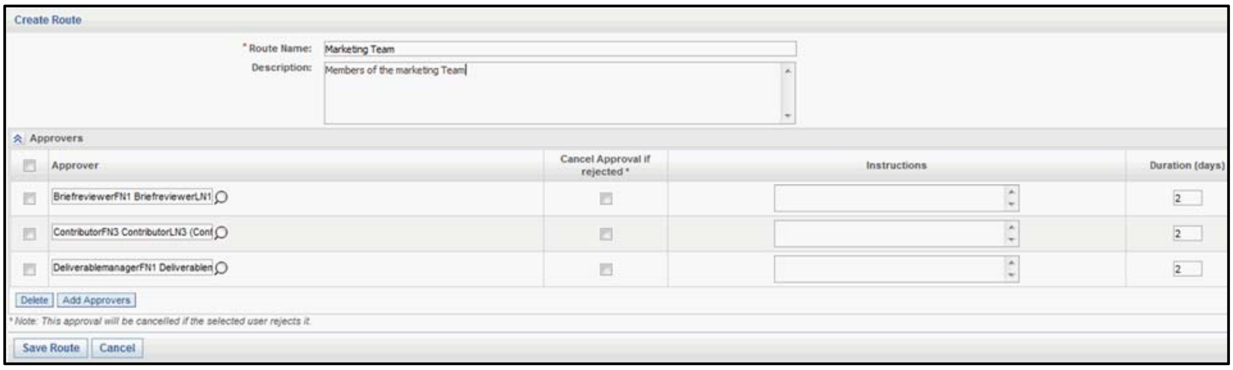


Figure No.2

21. Data Transfer Configuration

The admin users can configure Data Transfer using the 'Data Transfer Configuration' utility. For e.g. the admin can configure the data to be transferred from:

- A Brief to a Project.
- A Brief to a Deliverable.
- A Deliverable to a Digital Asset.

21.1. Getting Started

Click on the '**Data Transfer Configuration**' link on the left pane under Administration. A list of configurations are displayed **(Figure 1)**.

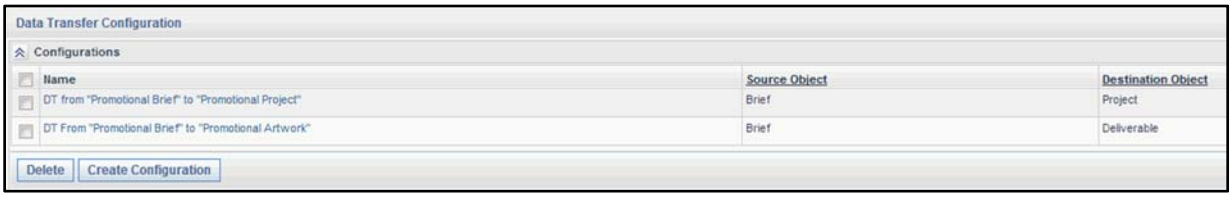


Figure No.1

To create a data transfer configuration click on the '**Create Configuration**' button.

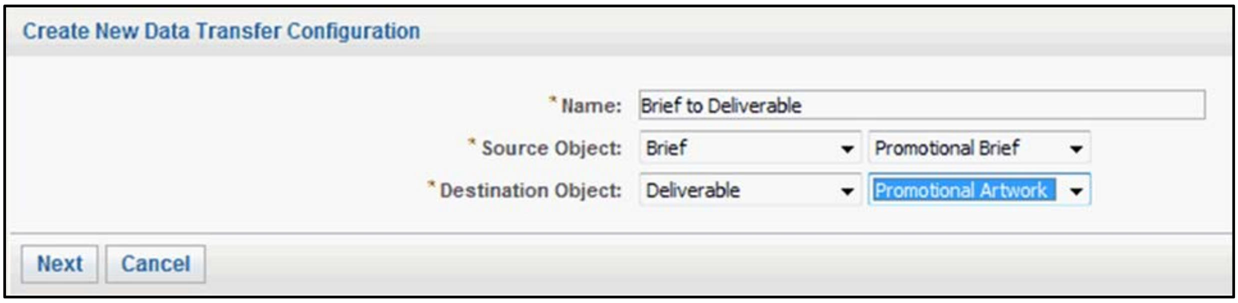


Figure No.2

The ID can be either auto generated or manually entered depending on the configuration.

Select the following:

- **Source Object**: Select the source object and the type.
- **Destination Object**: Select the destination object and the type.

Click on the '**Next**' button and select the fields to be transferred and save it by clicking on the '**Done**' button **(Figure 3)**.

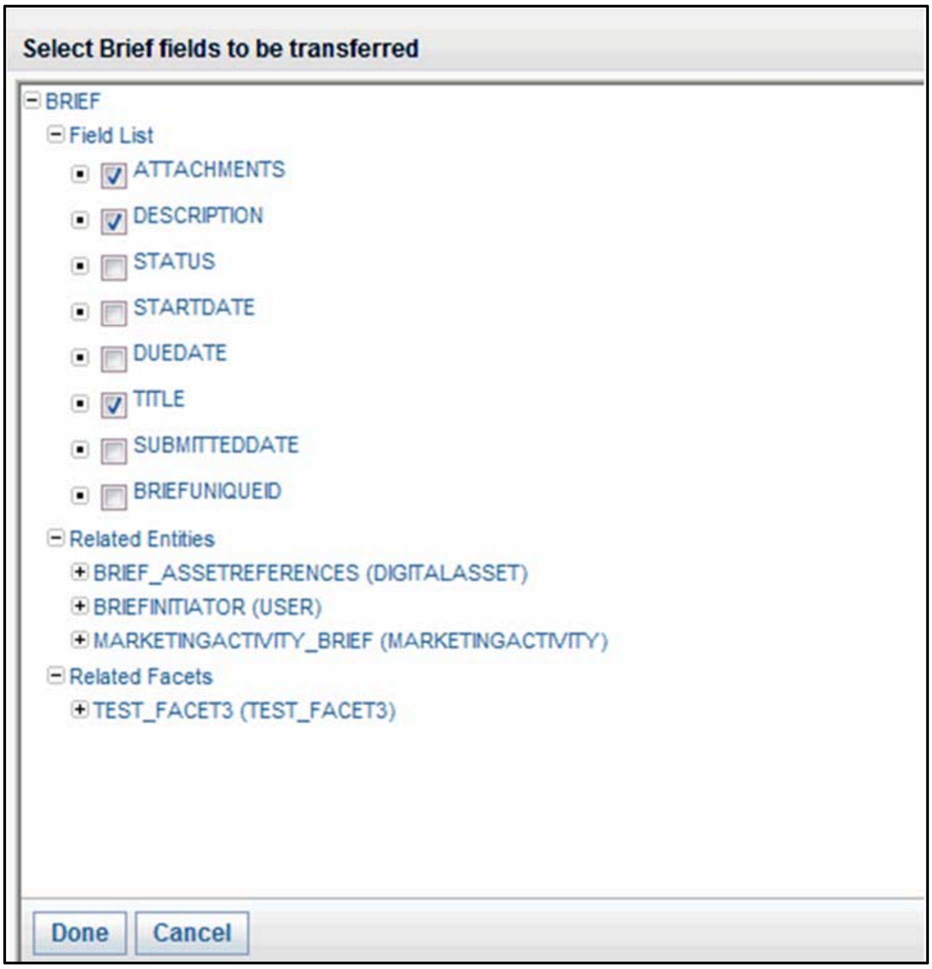


Figure No.3

A data transfer configuration screen is displayed **(Figure 4)**. The mapping of the source fields to the destination fields can be done by clicking on the '**Select**' button to select the fields to be mapped. Select when the data transfer should happen. More fields, group fields or facet series can be added or can be deleted. References from the digital library can be added.

Figure No.4

22. Import Data

The following data can be imported using the excel template provided:

- **For Strategic Planner**: Plans, Campaigns and its activities with their facets and attachments. The expense, budgets, scorecards and user information cannot be imported
- **For Offers**: Offers can be imported.
- **For Digital Library**: Sections hierarchy.
- **For Claims:** Claims and label information.

Note: Click on the job title link of the file whose status shows errors/warnings to view the errors/warnings details. You may then correct the errors in the excel sheet and re-import it.

22.1. Getting Started

Click on the '**Import Data**' link on the left pane under Administration. An import plan screen is displayed **(Figure 1)** by default.

22.1.1. Import Plans

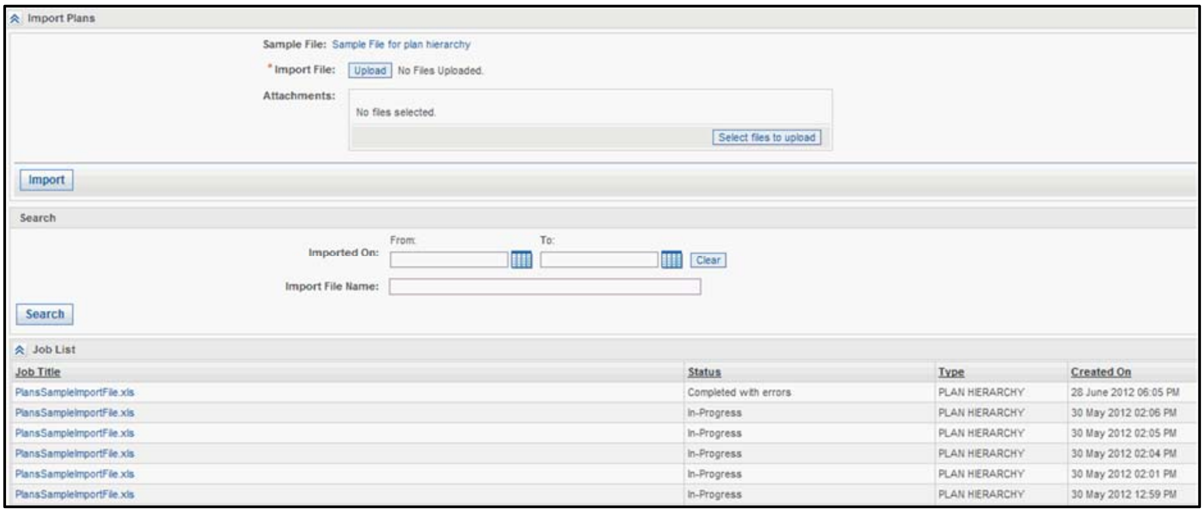


Figure No.1

On this screen the following actions can be done:

- **Import Plans**
  - o **Sample File**: Click on the link to download the sample file for plan hierarchy.
  - o **Import File**: The sample file can be filled in with all the plan details and uploaded here.
  - o **Attachments**: Reference files can be uploaded.
- **Search**: The import jobs created in the system can be searched for, by the date created and the file name.

- **Job List**: The list jobs created in the system can be viewed with detail such as job title, status (whether completed, completed with errors, failed, new or in-progress), type and created on.

If the Excel sheet downloaded by the user contains multiple sheets which the user needs to populate with relevant data **(Figure 2)**. The following are the sheets present:

Plan: On this sheet the following fields are present:

- **Plan ID** – This is a 'Numeric' field and will be a unique ID. If it is set to be auto generated then this field does not need to be populated.
- **Plan Title** – This is a string field and a mandatory field.
- **Description** – This is a string field
- **Business Unit** – This is a mandatory field. Business units need to be configured in the system before populating this field in the excel sheet.
- **Currency** – This is a numeric field.
- **Fiscal Year** - If the setting for fiscal year is set to 'True' then this field needs to be populated.
- **Start and End Dates** - If the setting for fiscal year is set to 'False' then the start and end dates for the Plan need to be entered.

MA Level1/2/3/4/5: On this sheet there are fields such as:

- **Parent/Plan ID** – This is a 'Numeric' field and will be a unique ID. The Parent ID needs to be entered to map the plan and the activities.
- **Title** – This is a string field and a mandatory field.
- **Exclude from Calendar** – This is a mandatory field.

The rest of the fields are not mandatory fields and can be omitted.

Plan Details Facet/MA Details Facet: If facets need to be associated with the pans and activities then please contact the respective Project Managers as the changes need to be made in the XML files.

Attachments: On this sheet there are fields such as:

- **File Name** – This is the name of the file which is an attachment.
- **Sheet Name** – This is the name of the sheet for which the attachment is.
- **Type ID** – This is ID of the plan/activity etc. for which the attachment is.
- **Field Names** – This the field name for which this attachment is.

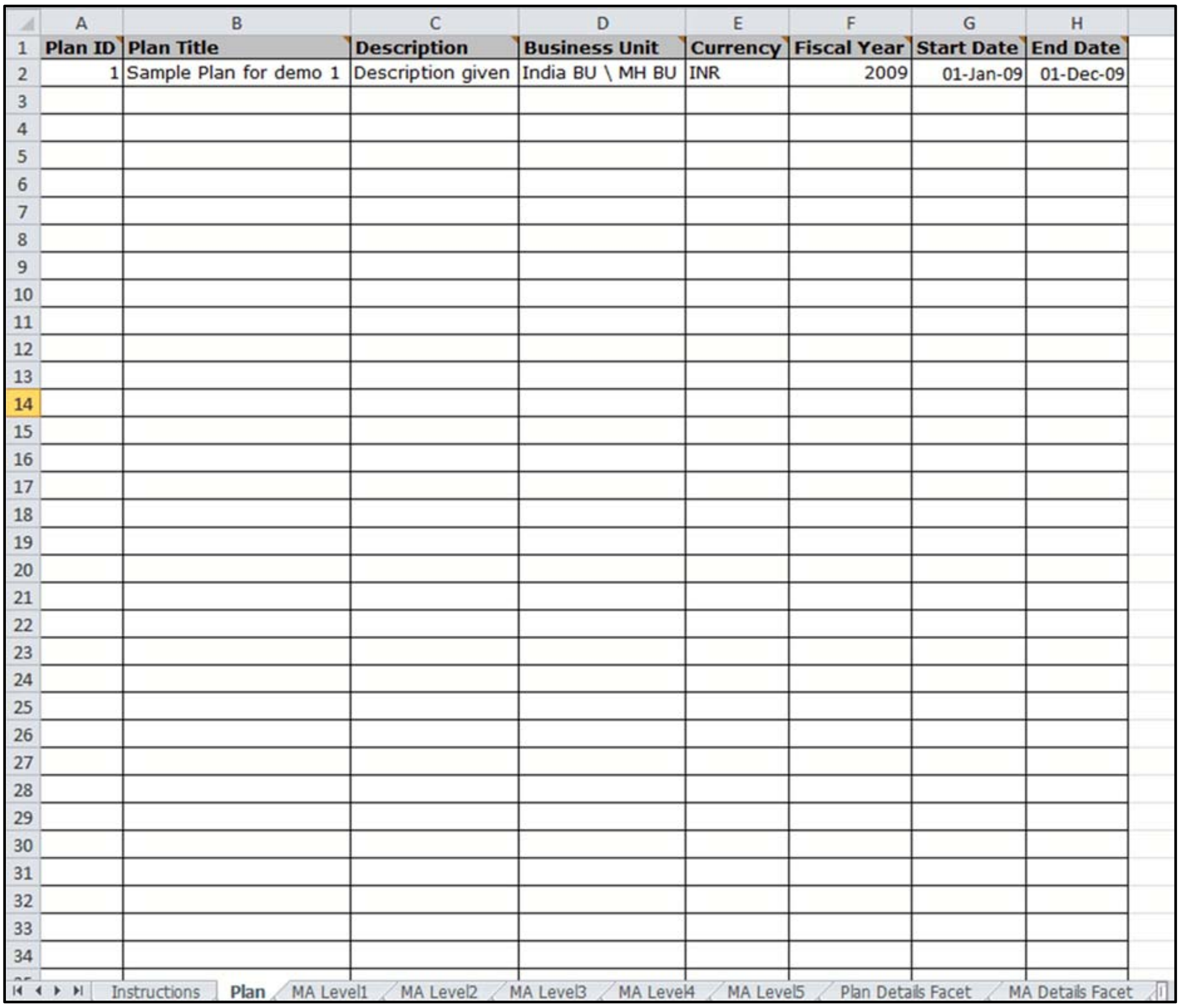


Figure No.2

22.1.2. Import Offers

Similar to Import Plans, offers can be imported into the system using this utility. The sample excel sheet is available, which can be downloaded and filled in with the relevant data and uploaded in the system by clicking on the '**Upload**' button **(Figure 3).**

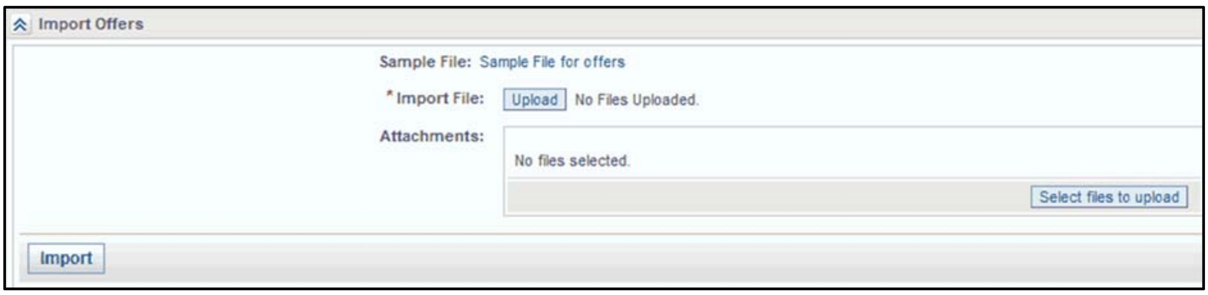


Figure No.3

22.1.3. Import Sections

Click on the '**Digital Library**' link on the left pane, an import sections screen is displayed. There is link to download the template in the form of an excel file in which the section hierarchy can be filled in. The first sheet is where the sections with the path and the security policy for the section needs to be entered. The second sheet has the instructions. The vaults need to be created and the security policy needs to be defined before the sections can be created.

After filling the section hierarchy with the path and the security policy to be applied to each section in the template the user can upload it by clicking on the '**Select File**' button. Click on the '**Submit**' button. This utility will create the sections hierarchy.

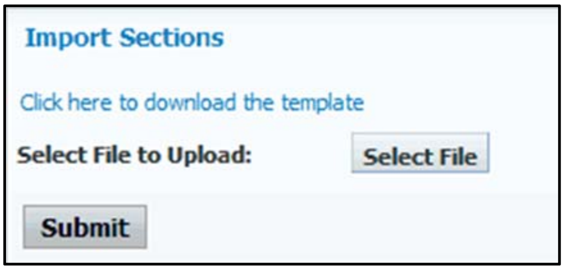


Figure No.4

22.1.4. Claim Management

Claim and label information can be imported into the system using the Import data utility.

An 'Import Claims' screen is displayed where a sample file is provided. The claim details need to be entered in the excel sheet provided. Download the file, enter the data and upload it into the system by clicking on the '**Upload**' button.

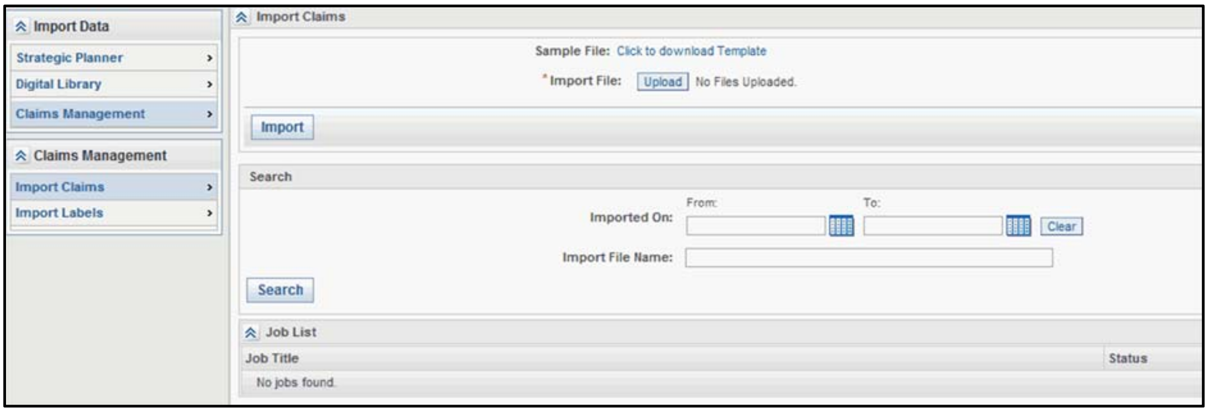


Figure No.5

Similarly, to import labels click on the '**Import Labels**' link on the left pane **(Figure 5)** and follow the same procedure as the Import claims.

Note: If Claims/Labels need to be imported without the ID's mentioned in the excel to be imported, changes needs to be done in the configuration XML for claims management.

The 'ImportData\Configuration\XML\Entity_Import_Configuration.xml' needs to be modified as follows:

In the <IMPORTDETAILS Name="CLAIM"> node add 'IsImportWithoutIDs="true" DummyPKFieldName="CLAIMID"',

It should look like: <IMPORTDETAILS Name="CLAIM" IsImportWithoutIDs="true" DummyPKFieldName="CLAIMID">.

Similarly for labels, add the above extension to the <IMPORTDETAILS Name="LABEL">

Note: Doing the above configuration we are saying import without IDs, but we are still saying Claims/Labels ID is necessary to match with the facet row in the other sheets.

23. Web Service Configuration

23.1. Overview

Web services are typically application programming interfaces (API) or web APIs that can be accessed over a network, such as the Internet, and executed on a remote system hosting the requested services. This is needed for integration of the system with internal or third party web services. Web services can take certain inputs from the system, perform certain functions and return values back to the system. It could also be used to query and or update data from or into other systems.

23.2. Getting Started

Click on the '**Web Service Configuration**' link on the left pane under the administration menu.

23.2.1. Registering WSDL's

The WSDL's (Web Service Description Language) can be registered using the register WSDL's utility. A view WSDL's screen is displayed with a list of the registered WSDL's.

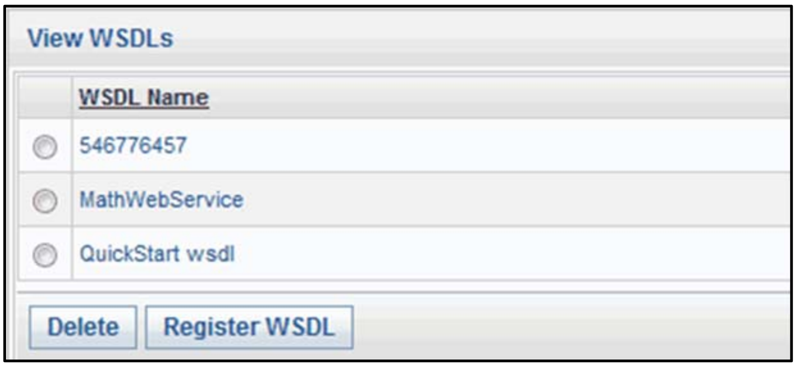


Figure No.1

Click on the '**Register WSDL**' button to register a new WSDL and enter the following details:

WDDL Details – The following details need to be entered:

- **WSDL Title** - The WSDL name.
- **Description** – Description for the WSDL.
- **Location** – This field indicates the location from where the web service will be accessed during the invocation of the web methods. The full path beginning with HTTP:// or HTTPS:// should be given.
- **Web Service Protocol** – Select the protocol as SOAP or REST (For the AL 6.0 release we support only SOAP).
- **Time Out** – Enter the time in milliseconds.
- **Anonymous Access Allowed** – Select Yes or No. This indicates the authorization used for calling the web methods. If no then:

- **Credentials** – The user name, parameter name for user name need to be entered. If the credentials allowed in SOAP header is yes then the password and the parameter name for the password need to be entered. If no then only the password needs to be entered.
- **Upload WSDL** – A new WSDL can be uploaded by browsing and then uploading.

To save the WSDL click on the '**Save**' button or to cancel the operation, click on the '**Cancel**' button.

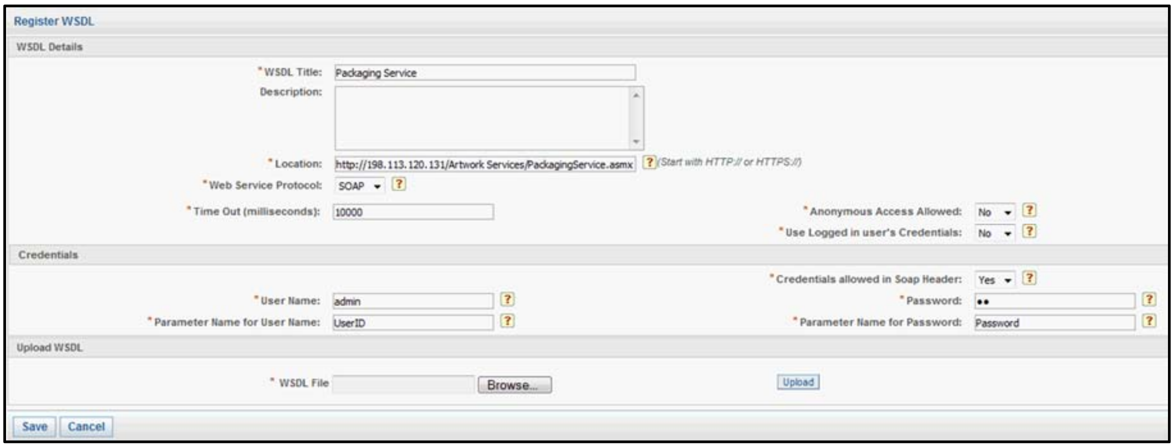


Figure No.2

To edit or view the WSDL click on the WSDL name link on the view WSDL's screen. A WSDL details screen is displayed which displays the WSDL details. A tree view of the selected web service is displayed.

A WSDL can be exported or imported by clicking on the '**Export WSDL**' or '**Import WSDL**' buttons respectively.

23.3. Web Service List

Click on the 'Web Service List' link on the left pane, a list of configured web services are displayed. Click on the name link to edit a web service. A web service can be imported also.

Click on the '**Create**' button and select the WSDL method from the list and enter all the web service information.

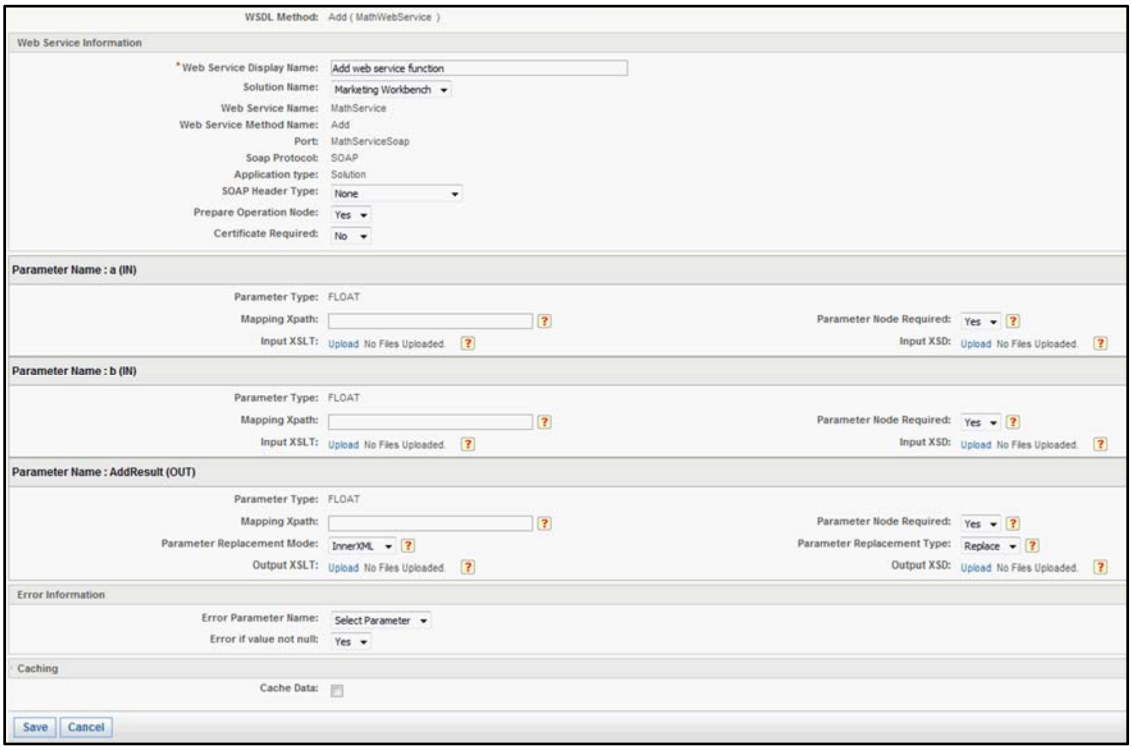

WSDL Method: Add (MathWebService)
Web Service Information
*Web Service Display Name: Add web service function
Solution Name: Marketing Workbench
Web Service Name: MathService
Web Service Method Name: Add
Port: MathServiceSoap
Soap Protocol: SOAP
Application type: Solution
SOAP Header Type: None
Prepare Operation Node: Yes
Certificate Required: No
Parameter Name : a (IN)
Parameter Type: FLOAT
Mapping Xpath:
Input XSLT: Upload No Files Uploaded.
Parameter Node Required: Yes
Input XSD: Upload No Files Uploaded.
Parameter Name : b (IN)
Parameter Type: FLOAT
Mapping Xpath:
Input XSLT: Upload No Files Uploaded.
Parameter Node Required: Yes
Input XSD: Upload No Files Uploaded.
Parameter Name : AddResult (OUT)
Parameter Type: FLOAT
Mapping Xpath:
Parameter Replacement Mode: InnerXML
Output XSLT: Upload No Files Uploaded.
Parameter Node Required: Yes
Parameter Replacement Type: Replace
Output XSD: Upload No Files Uploaded.
Error Information
Error Parameter Name: Select Parameter
Error if value not null: Yes
Caching
Cache Data:
Save
Cancel

Figure No.3

24. Integration Toolkit

SAS Marketing Operations Management includes a fully automated configuration utility or Integration Toolkit for the MOM-MA integration. This toolkit is a one click configuration utility which allows SAS Marketing Operations Management to integrate with SAS Marketing Automation.

What does this Toolkit Configure?

- Web Service Configuration to link MOM and MA
- Installation and configuration of process definitions, forms and files necessary to make the integration work

24.1. How to apply the Integration?

The integration can be set up by the admin only. After logging into the system click on the '**Integration Toolkit**' link on the left pane under the administration section **(Figure 1)**.

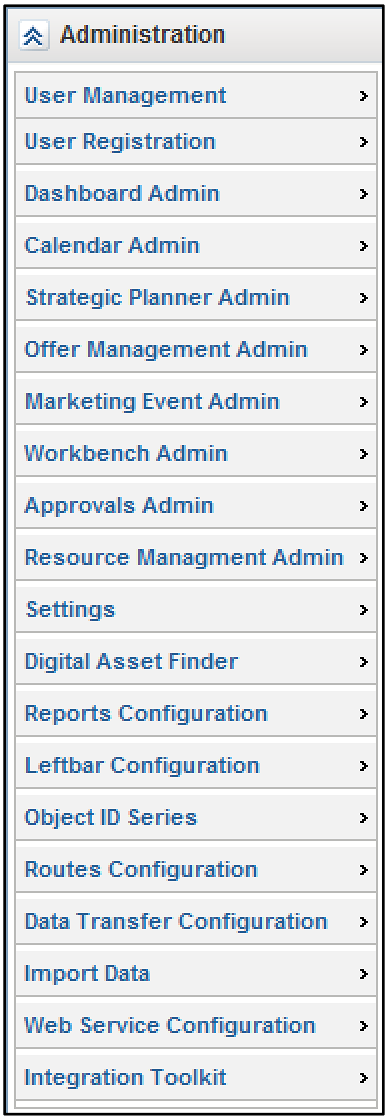


Figure No.1

A register WSDL screen is displayed **(Figure 2)**. The following WSDL details need to be entered for the integration to be registered:

- **WSDL Title and description**: The WSDL title is 'QuickStart wsdl'. The description can be user defined.
- **Location**: This field indicates the location from where the web service will be accessed during the invocation of the web methods. For E.g. http://198.113.120.131:8089/MAMOMIntegration/Services/CIMAIntService Soap
- **Web Service Protocol**: This field indicates the protocol used to communicate with the web service. It is by default 'SOAP'.
- **Time Out (milliseconds)**: The time (in milliseconds) needs to be entered.
- **Anonymous Access Allowed**: This field indicates the user context used for calling the web methods.

After entering the details click on the '**Next**' button.

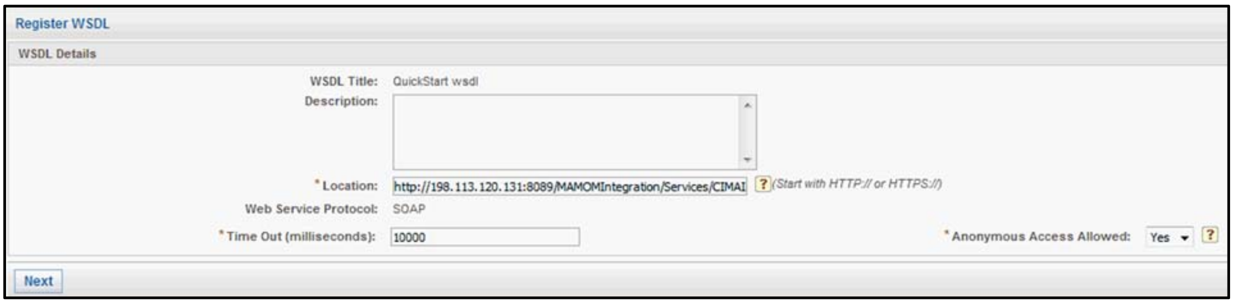


Figure No.2

The checks are made and the integration is done by:

1. Executing the database scripts
2. Registering the WSDL's
3. Importing the XPDL's
4. Copying the files and forms

Once the integration is applied successfully, the logs can be checked by clicking on the '**Apply integration successful. Please click to check the log**' link **(Figure 3)**. If there is an error while applying the integration, it can be aborted and restarted after checking the error logs.

Figure No.3

25. Tools

There are two links on the left pane under the tools section for vendor and resource management.

25.1. Glossary of terms used

Vendor / Agency – Vendor/Agency are the sellers/suppliers appointed to provide services for executing Programs/Activities/Sub-activities.

Vendors Profile - Details of the vendor including the name, description, contact information, contract details etc.

Statement of Work / Staffing Plan – A document which captures the estimates, projects, resources, etc. required by the vendor to complete an ad-hoc project or the annual projects.

Estimate - A working artifact that becomes a statement of work once the estimate is finalized/approved.

Estimate Review / Approval – The process of routing the estimate through a group of individuals in the organization for an opinion and finally approval on it.

Rate Card - A listing of charges (rates) associated with different types of resources of the vendor.

Resources - Resources are required to carry out the project tasks. They can be people, equipment, facilities, etc. required for the completion of a project activity.

Resource Category - Resources can be clubbed into categories based on the skills, roles etc. e.g. Designers, Directors.

Work Items - Work Items are set of items in the vendor's estimate that represent resources, resource categories or rate card items employed to complete a unit of work.

Work Line Items - A Work Item comprises of several work line items each representing a resource, resource category, rate card item, the rate per unit, volume required and as a result the cost. The sum total of all work line items will be the total of a work item.

25.2. Vendor Management

Vendor management provides centralized repository to manage the resources which may not be the users of SAS Marketing Operations Management. Categories for a vendor and all the relevant information related to the vendor mentioned below can be stored:

- List of contacts – The list of contacts for the vendor.
- General contract terms (minimum commitments, payment terms, out-of-pocket expense policies, etc.)
- Resources and their skill levels – The resources and the skill levels of each resource can be stored.
- Rate card for services and goods - The vendor rate card can be maintained in the system. The rate card specifies the rates per resource category of the vendor which could be non-humans resources also.

Create a vendor profile by clicking on the '**Vendor Management**' link on the left pane under the tools **(Figure 1)**.

Figure No.1

A view vendors screen is displayed.

25.2.1. Adding New Vendors

On the view vendors screen the existing vendors in the system can be viewed by searching alphabetically or by vendor type. The existing vendors can be modified by clicking on the vendor name link.

The selected vendor can be deleted by clicking on the '**Delete**' button.

Figure No.2

New vendors can be created by clicking on the '**New**' button. A create vendor screen **(Figure 3)** is displayed where the following details are entered:

- **Vendor Number** – The vendor number can be entered by the user or could be auto generated depending on the setting.
- **Name** – The vendor name.
- **Description** – Vendor description.
- **Vendor Address** – The address of the vendor.
- **Vendor Type** – The preconfigured vendor types can be selected from the drop down box. The vendor types can be configured from the strategic planner admin.
- **URL** – Enter the URL of the vendor.
- **Currency** – Select the currency from a drop down box.
- **Business Unit(s)** – The currency used by the vendor for all the transactions.
- **Holding Company** – Name of the holding company.
- **Business Type** – Enter the business type.
- **Mark as Obsolete** – Select yes or no.
- **Vendor attachments** – Upload any vendor attachments by clicking on the 'Upload' button and browsing through the file system.
- **Contract Information:**
    - **Description** – Enter the description of the contract.
    - **Contract Documents** - Upload any contract documents by clicking on the 'Upload' button and browsing through the file system.

Save the vendor information by clicking on the '**Save**' button.

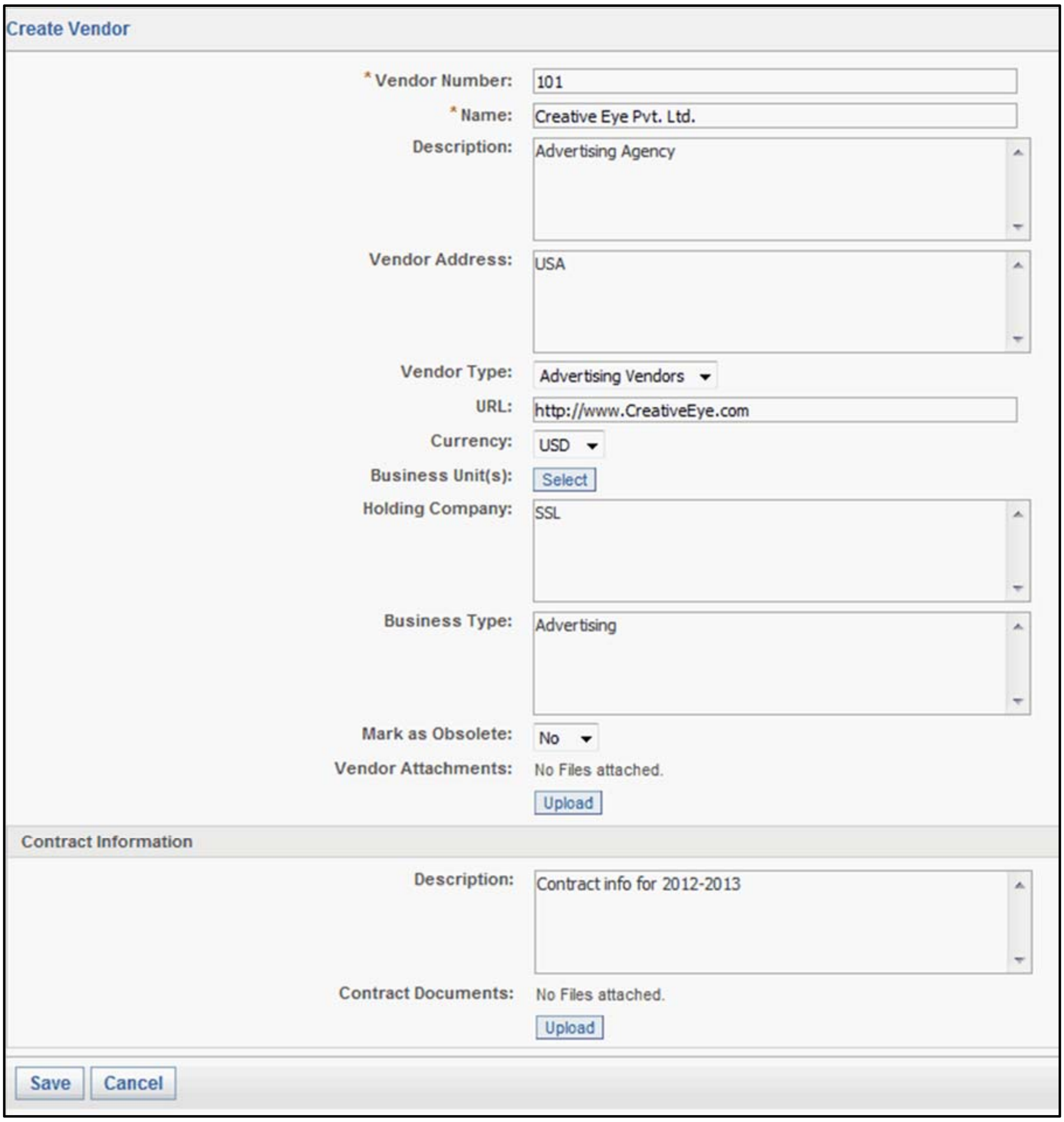


Figure No.3

25.2.2. Viewing Vendors

After saving the vendor details **(Figure 3)** or clicking on the vendor name link on the view vendors screen **(Figure 2)** a view vendor details screen is displayed. The following tabs are displayed on the view vendor details screen:

- **Info** - The vendor information is displayed. The information can be edited by clicking on the '**Edit**' button.

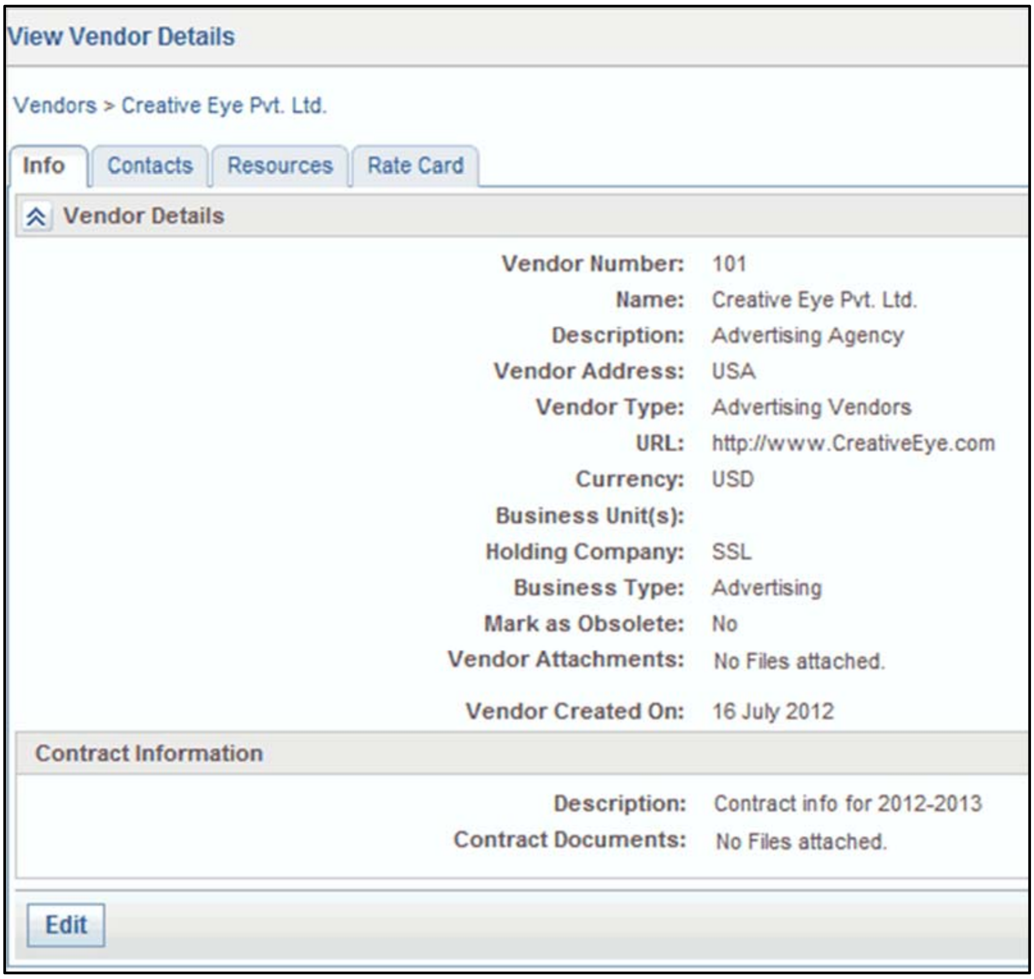


Figure No.4

- **Contacts** – The vendor contact are displayed with the name, email, residence/mobile/office/fax numbers. The details for each contact can be viewed by clicking the contact name link. The contact details can be edited by clicking on the '**Edit**' button on the extreme right side. The vendor can add contacts by clicking on the '**Add Contact**' button.

Figure No.5

- **Resources** – On the view vendor details screen in the resource tab a graphical view of the vendor's resource allocations where the projects that an agency will be working on for the year, their corresponding resource hours (allocated and unallocated) are displayed. The resource can be deleted by clicking on the 'Delete' button on the right of the screen. The resources of the vendor can be added by clicking on the '**Add Resource**' button (Figure 6). A create resource screen is displayed where the following resource details can be entered:

- **Is Resource the user of the system** – This is selected by default.
- **Select User** - Type in the user name in the edit box, to search the users. If the text is in red then it is not a valid user.
- **Resource Category** – Select the resource category (Configured in resource management) by clicking on the 'Select' button.
- **Unit of Measurement** – The unit of measurement can be selected as hour, day or month.
- **Rate** – Select the currency and enter rate for the resource.
- **Skill Level** – Enter the skill level of the resource.
- **Country** – Select the country from the drop down list.

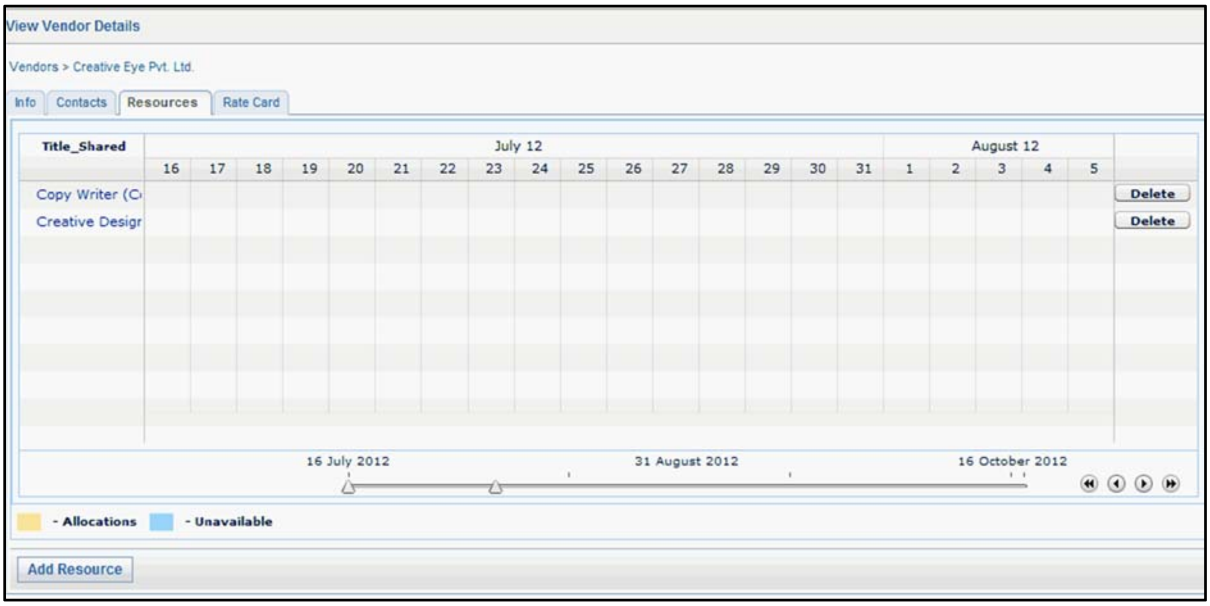


Figure No.6

- **Rate Card** – Each item on the rate card can be edited/deleted by clicking on the '**Edit**'/'**Delete**' button respectively on the extreme right side. When editing the rate card item and the unit of measure can be selected from a drop down list. The rate, minimum and maximum volume and comments can be entered. Save the rate card by clicking on the 'Save' button. More rows can be added for more rate card items.

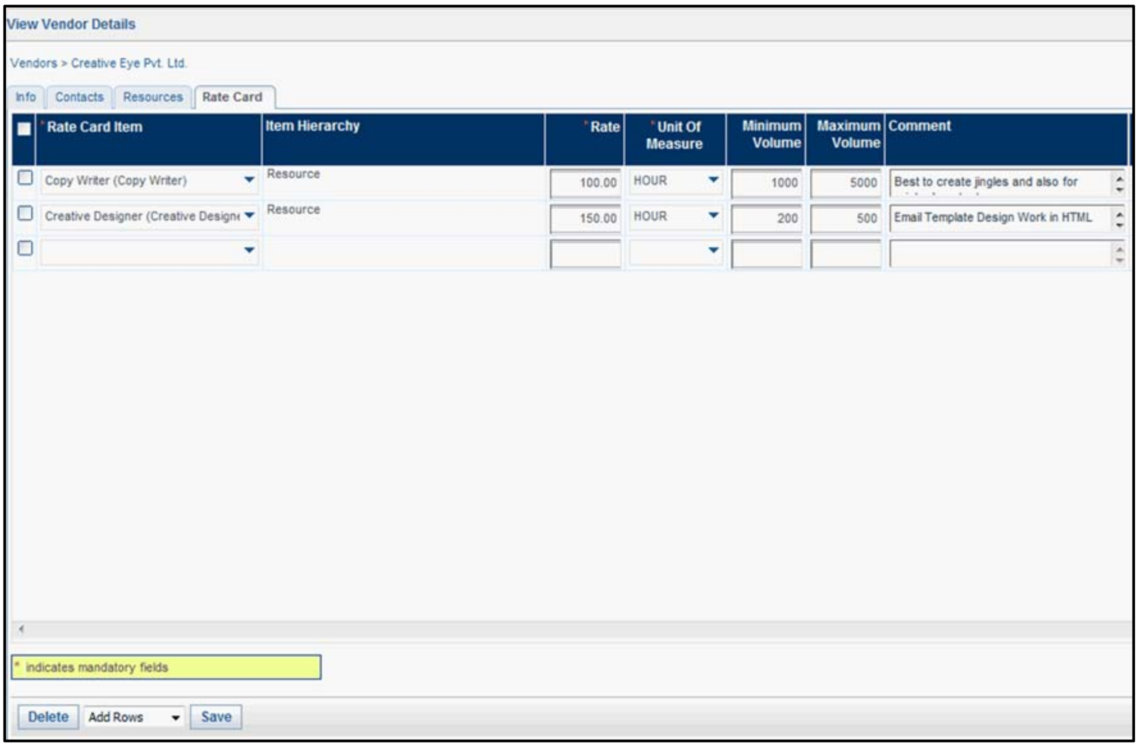


Figure No.7

25.2.3. Adding Rate Card Item type

Click on the '**Rate Card Item Type**' link on the left pane of the view vendor's screen. A view rate card item type screen is displayed. The existing rate card item type in the system can be viewed by entering the name and searching. The existing rate card item type can be modified by clicking on the name link. The selected vendor can be deleted by clicking on the '**Delete**' button.

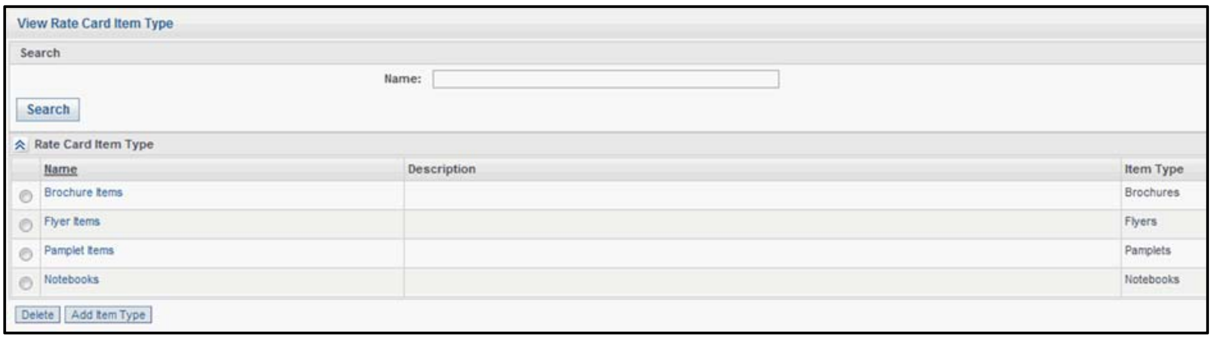


Figure No.8

New rate card item types can be created by clicking on the '**Add Item Type**' button. A create rate card item type screen **(Figure 9)** is displayed. Enter the name, description and the item type (Configured in schema designer under '**RATECARDITEMTYPE**' named hierarchy).

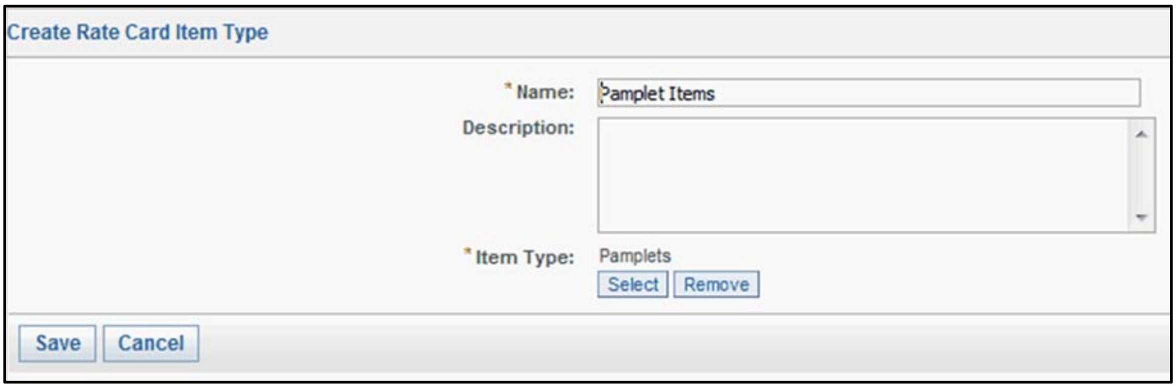


Figure No.9

25.3. Resource Management

Resource management provides the following functionality:

- To create and manage resource categories in a hierarchy. Resources can be created which will be associated with a resource category in the system.
- Unit of measure of the resource category under which the resource is associated will be applicable to the resource. There will be a current rate associated with the resource.
- To manage standard holidays for each country for every calendar year. Weekends will be tracked for each country as non-working days.
- The availability of the resource in the time frame would be verified from the unavailability, the weekends and standard holidays for the resource.

Create a resource profile by clicking on the '**Resource Management**' link under the tools menu **(Figure 1)**. A view resource categories screen is displayed **(Figure 10)**.

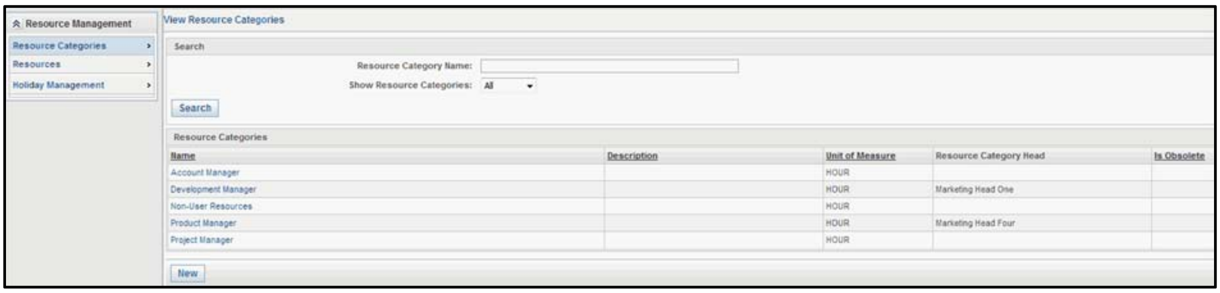


Figure No.10

There are three links on the left pane:

25.3.1. Resource Categories

A list of resource categories are displayed by default. By clicking on the name link the resource category can be edited. A search is available and resources can be searched on filters such as resource name, active, obsolete or all resources.

To create a new resource category click on the '**New**' button **(Figure 10)**. A create resource category screen **(Figure 11)** is displayed. Enter the name, description, select the unit of measure and enter the resource category. A resource can be marked as obsolete if the resource is no more being used as a resource. These resources cannot be selected for any new activities/projects. Enter the first letter of the resource category head to get a drop down list of the users with the letter entered as the first letter. All the resources under this category report to the resource category head. Save the resource category by clicking on the '**Save**' button.

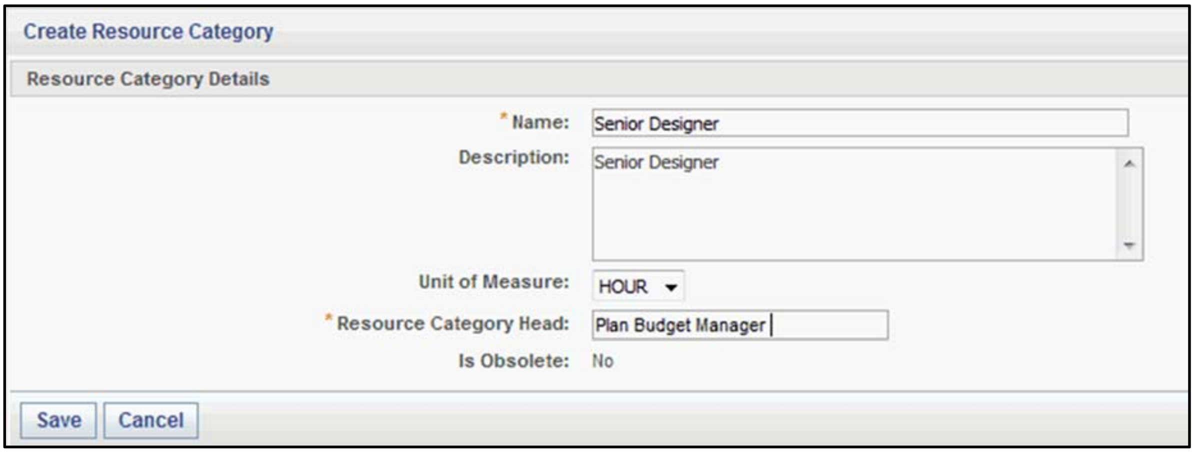
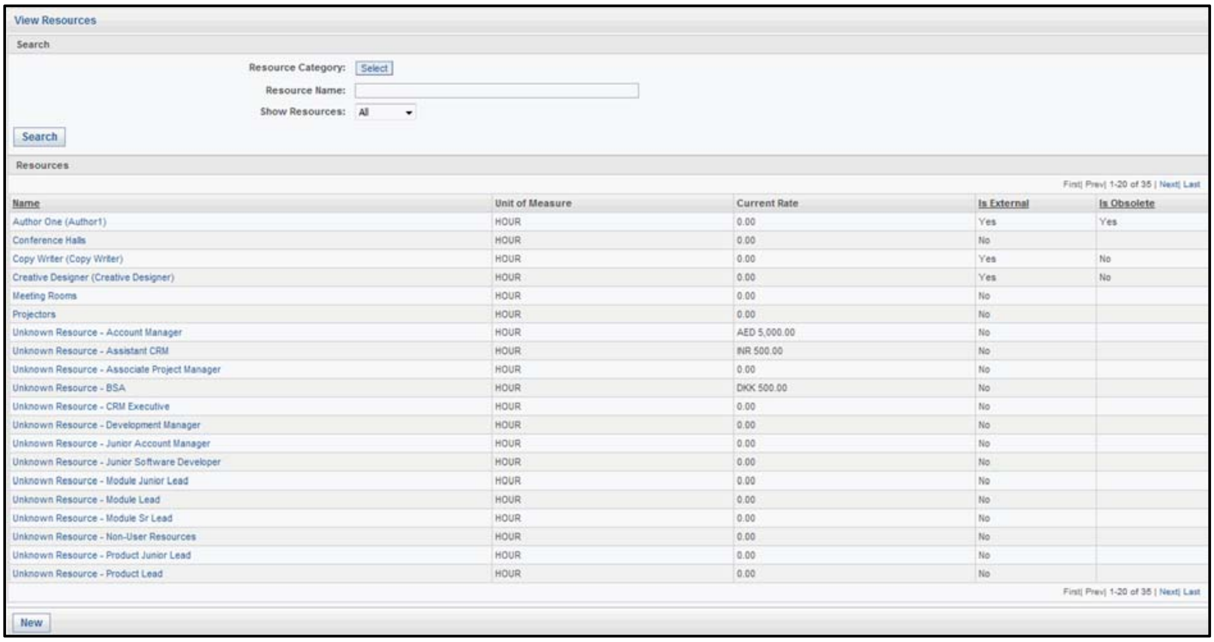


Figure No.11

25.3.2. Resources

Click on the '**Resources**' link on the left pane under resource management **(Figure 10)** to view a list of configured resources. A view resources screen is displayed **(Figure 12)**. Resources can be searched for by selecting the resource category and entering the keywords for the resource name and click on the '**Search**' button.



Name	Unit of Measure	Current Rate	Is External	Is Obsolete
Author One (Author1)	HOUR	0.00	Yes	Yes
Conference Halls	HOUR	0.00	No	
Copy Writer (Copy Writer)	HOUR	0.00	Yes	No
Creative Designer (Creative Designer)	HOUR	0.00	Yes	No
Meeting Rooms	HOUR	0.00	No	
Projectors	HOUR	0.00	No	
Unknown Resource - Account Manager	HOUR	AED 5,000.00	No	
Unknown Resource - Assistant CRM	HOUR	INR 500.00	No	
Unknown Resource - Associate Project Manager	HOUR	0.00	No	
Unknown Resource - BSA	HOUR	DKK 500.00	No	
Unknown Resource - CRM Executive	HOUR	0.00	No	
Unknown Resource - Development Manager	HOUR	0.00	No	
Unknown Resource - Junior Account Manager	HOUR	0.00	No	
Unknown Resource - Junior Software Developer	HOUR	0.00	No	
Unknown Resource - Module Junior Lead	HOUR	0.00	No	
Unknown Resource - Module Lead	HOUR	0.00	No	
Unknown Resource - Module Sr Lead	HOUR	0.00	No	
Unknown Resource - Non-User Resources	HOUR	0.00	No	
Unknown Resource - Product Junior Lead	HOUR	0.00	No	
Unknown Resource - Product Lead	HOUR	0.00	No	

First| Prev| 1-20 of 35 | Next| Last

New

Figure No.12

Creating New Resources

New resources can be added by clicking on the '**New**' button **(Figure 12)**. A create resource screen is displayed **(Figure 13)**. Enter the following details for creation of new resources:

- **Is Resource the user of the system** – If checked then the users of the SAS Marketing Operations Management solution can be selected as resources. If not then an external user who could be the vendor resource can be added.
- **Name and Description** – Enter the resource name and description.
- **Resource Category** – Select from the configured resource categories by clicking on the '**Select'** button. Remove the existing resource category by clicking on the 'Remove' button.
- **Unit of Measure** – Select the units of measure from a predefined list.
- **Rate** – Select the currency and enter the rate of the resource.
- **Skill Level** – Enter the skill level of the resource.
- **Country** – Select the country from a predefined list.
- **Is Obsolete** - Resources can be marked as obsolete if they are no longer required as a resource in the system.
- **Availability Hours per week** - The availability of a resource can be entered i.e. how many hours per day and how many days in a week is the resource available.

Save the resource by clicking on the '**Save**' button.

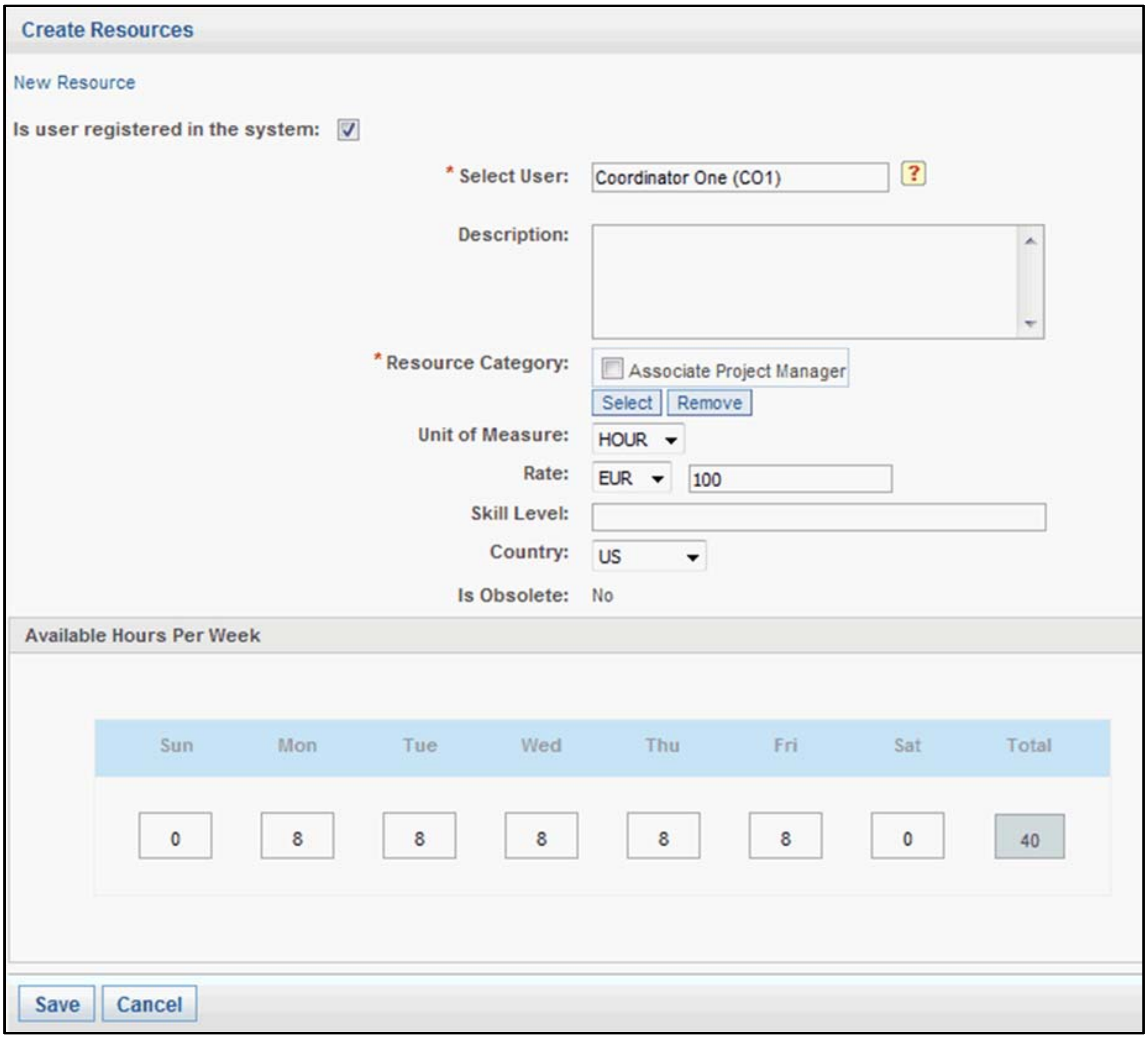


Figure No.13

Viewing Resources

On the view resources screen **(Figure 12)** click on the name link of the resource to view a tabbed view of the resource information and checking the availability/unavailability of the resource.

On the info tab the resource information is displayed which can be edited. The task calendar with the tasks and allocations/unavailability of the resource, weekends and standard holidays are displayed on this calendar.

On the availability tab the availability/unavailability of the resource could be marked by selecting the dates and giving the reason for the unavailability and clicking on the '**Mark as unavailable**' button. To mark the user as available select the dates marked as unavailable and click on the '**Mark as available**' button.

To save the changes made click on the '**Save Changes**' button.

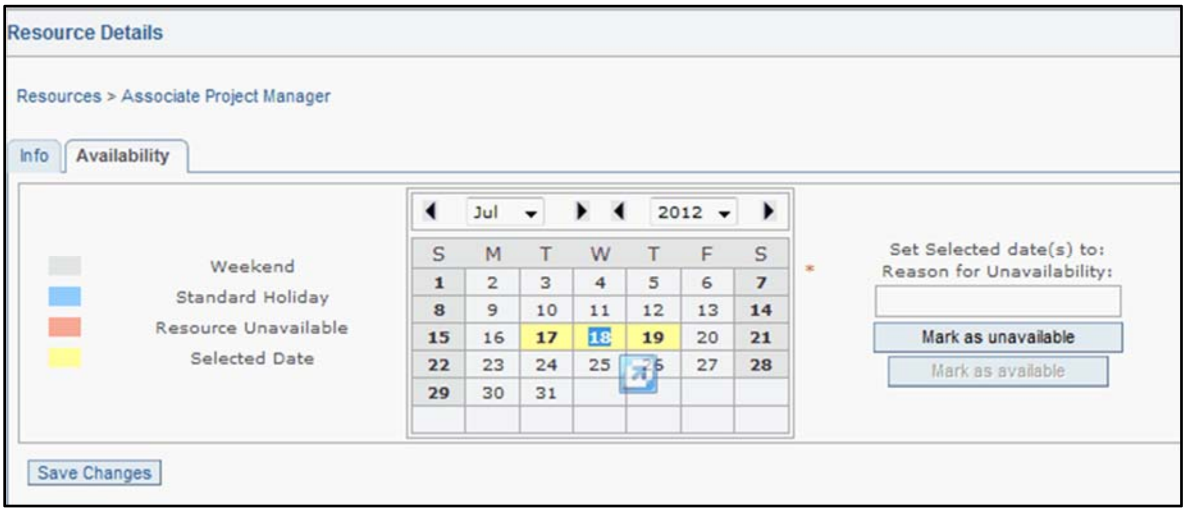
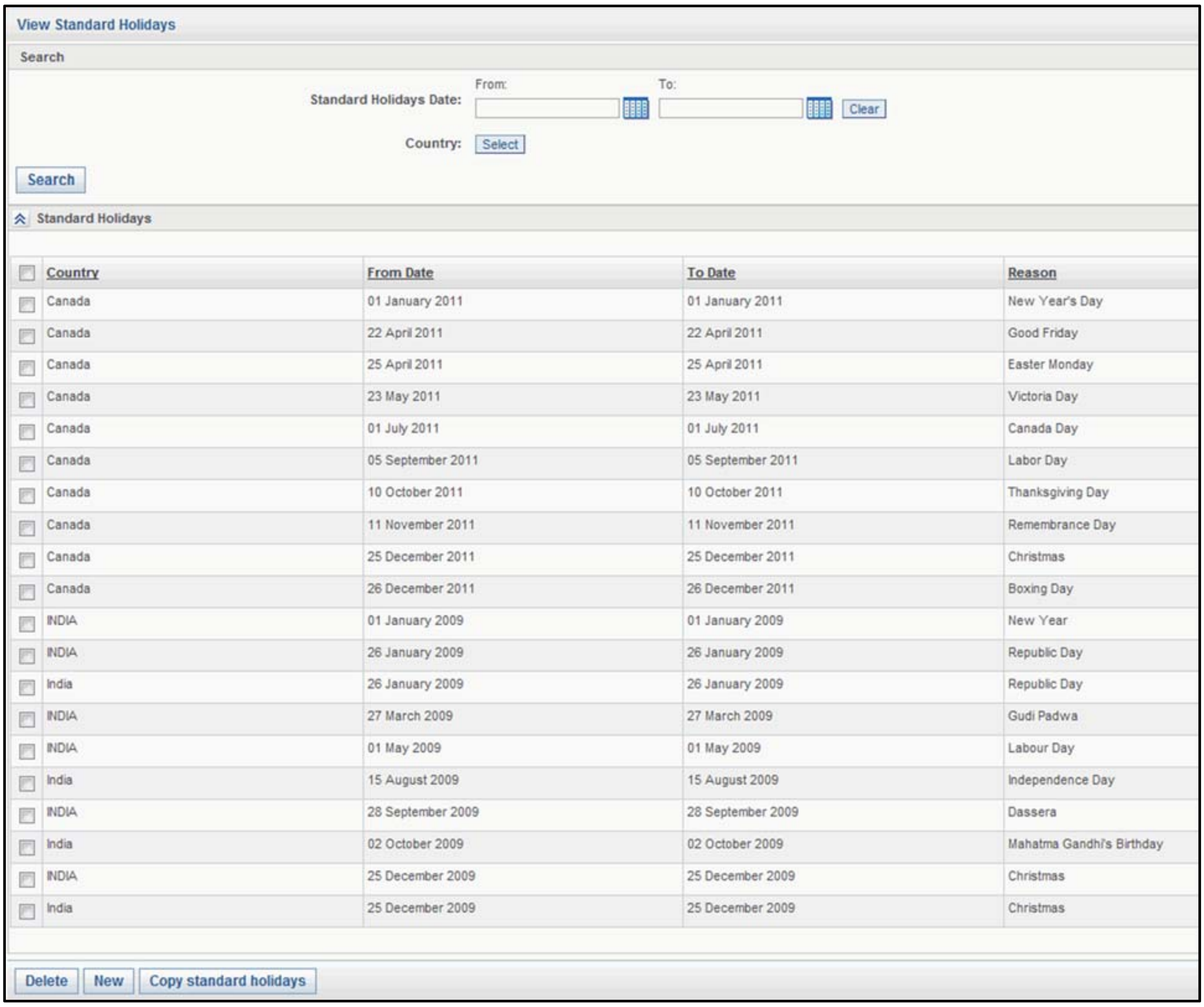


Figure No.14

25.3.3. Holiday Management

Click on the '**Holiday Management**' link on the left pane under resource management **(Figure 10)** to view two links under it:

1. **Standard Holidays** – A view standard holidays screen **(Figure 15)** is displayed by default where the holidays can be searched for by selecting the dates (to and from) and selecting the country and clicking on the '**Search**' button. The following operations can be performed on this screen:
    a. **Delete** - A selected holiday can be deleted by clicking on the '**Delete**' button.



Country	From Date	To Date	Reason
Canada	01 January 2011	01 January 2011	New Year's Day
Canada	22 April 2011	22 April 2011	Good Friday
Canada	25 April 2011	25 April 2011	Easter Monday
Canada	23 May 2011	23 May 2011	Victoria Day
Canada	01 July 2011	01 July 2011	Canada Day
Canada	05 September 2011	05 September 2011	Labor Day
Canada	10 October 2011	10 October 2011	Thanksgiving Day
Canada	11 November 2011	11 November 2011	Remembrance Day
Canada	25 December 2011	25 December 2011	Christmas
Canada	26 December 2011	26 December 2011	Boxing Day
INDIA	01 January 2009	01 January 2009	New Year
INDIA	26 January 2009	26 January 2009	Republic Day
India	26 January 2009	26 January 2009	Republic Day
INDIA	27 March 2009	27 March 2009	Gudi Padwa
INDIA	01 May 2009	01 May 2009	Labour Day
India	15 August 2009	15 August 2009	Independence Day
INDIA	28 September 2009	28 September 2009	Dassera
India	02 October 2009	02 October 2009	Mahatma Gandhi's Birthday
INDIA	25 December 2009	25 December 2009	Christmas
India	25 December 2009	25 December 2009	Christmas

Figure No.15

b. **New** - New standard holidays can be added by clicking on the '**New**' button. An add new holiday popup is displayed **(Figure 15)** where the country, date range (from and to) and the reason needs to entered. Save the holiday by clicking on the '**Save**' button.

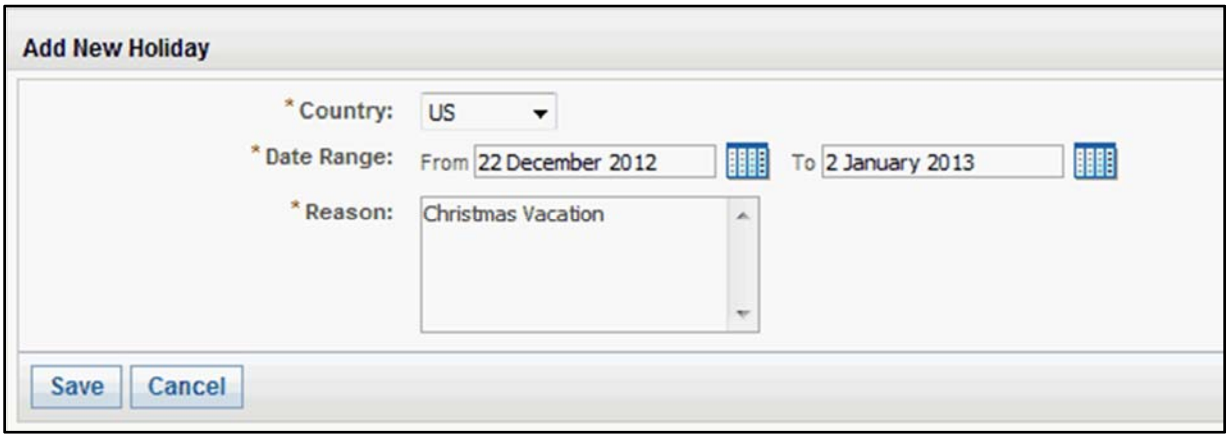


Figure No.16

c. **Copy standard holidays** – A selected holiday could be copied for the next fiscal year by clicking on the '**Copy standard holidays**' button. A copy standard holidays popup is displayed **(Figure 17)**. The year to which the holiday is to be copied can be selected. The standard could be edited.

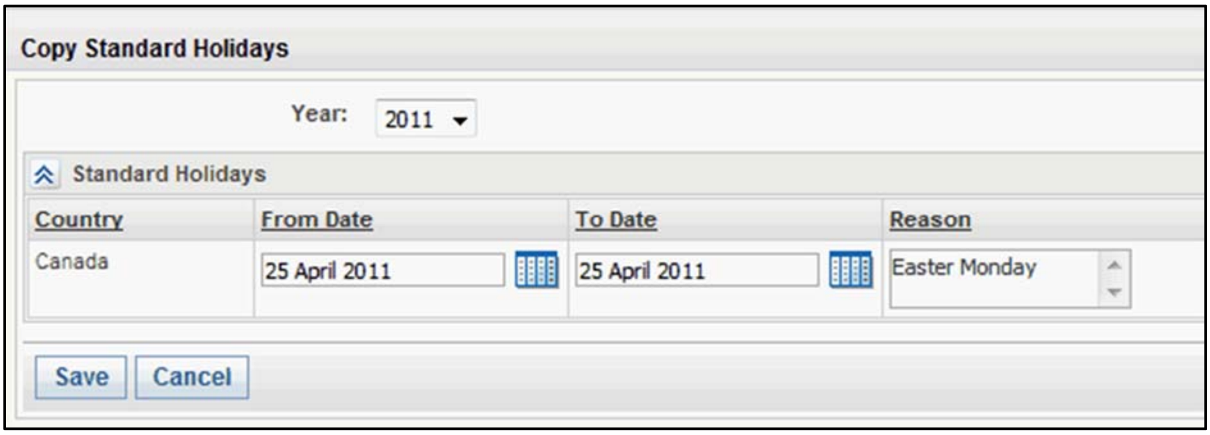


Figure No.17

d. **Weekends** – Click on the '**Weekends**' link on the left pane. A view weekends screen is displayed where the weekends for a country are displayed. The weekends can be searched for by selecting the country and clicking on the '**Search**' button.
A selected weekend can be deleted by clicking on the '**Delete**' button.
New weekends can be added by clicking on the '**New**' button. An add new weekend popup is displayed **(Figure 18)** where the country and the weekday needs to be selected.
Save the weekend by clicking on the '**Save**' button.

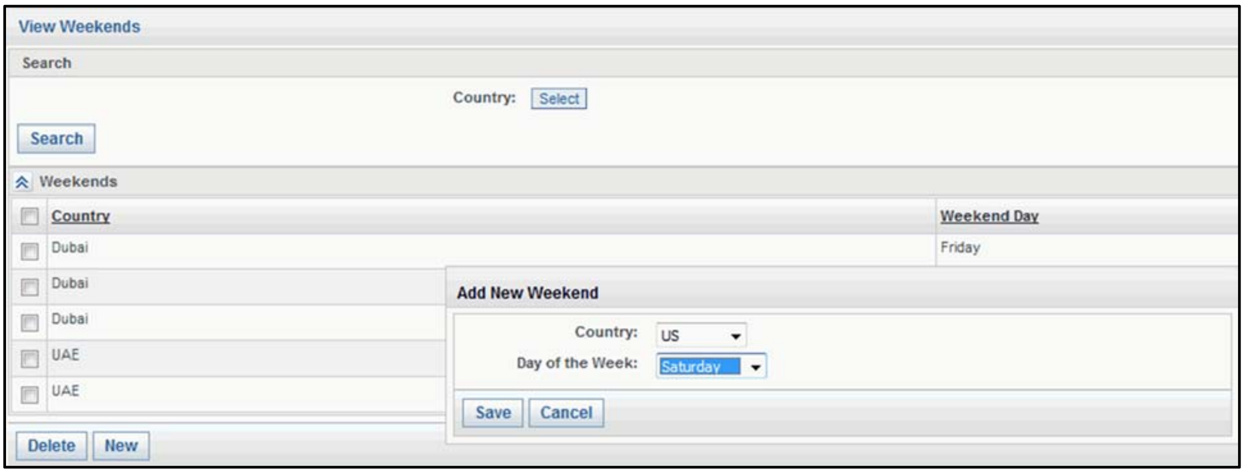


Figure No.18