THE POWER TO KNOW®

SAS® Marketing Operations Management 6.0 R14
User's Guide

SAS® Documentation

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

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SAS Marketing Operations Management – Introduction

Overview

SAS Marketing Operations Management solution provides a comprehensive framework to manage all aspects of marketing, from planning to creative services management. It consists of solutions such as Dashboard, Strategic Planner, Marketing Workbench, Digital Library, Claims Management, Marketing Knowledge Manager and Site Builder, which can be used individually or together as an Integrated Enterprise Solution. In addition, the solution comes with pre-defined reports related to planning, resource allocations, project status, budgets, content, usage audits and much more.

Dashboard

The aggregated and summarized information on strategy, plans, budgets, workbench and digital content can be displayed on the dashboard. It represents a single point of access to the rich functionality of the SAS Marketing Operations Management solution and can be personalized to satisfy each user's preferences. The dashboard is also used to post the latest news, upcoming events and bookmark relevant websites.

Calendars

Helps publish the marketing activities, events, offers in a graphical manner improving visibility into Marketing Operations. It allows for better preparedness, planning and efficient collaboration.

Strategic Planner

Enables the product managers, segment managers and campaign managers to define marketing plans consisting of campaigns (a set of related marketing activities) and associated marketing activities (specific to each channel – advertising, direct marketing, telemarketing, event, PR, etc.). Each campaign and activity has associated schedules, budgets, sources of funds and various other attributes.

The committed and spent budgets can be tracked during the execution of a campaign.

Marketing operations and the control teams can be authorized to forecast spends for each marketing activity, manage the commitments to vendors and track the spending, invoices and status of payments of each invoice.

Offer Management

Provides a searchable centralised repository for creating, storing and maintaining Marketing Offers along with relevant information. It also allows offer information to be shared with key stakeholders in the Marketing and Promotions process.

Marketing Workbench

Enables the marketing services & the creative design team to capture design briefs, define artworks, allocate tasks to in-house designers, copywriters and external vendors & track the overall progress of artwork design projects & product launch. It facilitates marketing teams to build workflow templates based on marketing best practices related to product launches, collateral design, advertising, direct marketing, sponsorship and event management. It generates schedules & timelines based on these templates & sends automatic e-mail notifications and reminders to internal and external participants as well as contributors.

Resource Planner

Allows for better planning and ensures execution of Marketing Activities and Projects through better planning of marketing resource allocations. It gives visibility of resource availability and allows easy allocation and reallocation of resources across Marketing Activities and Projects.

Approvals

Provides a collaborative tool to manage and track approval of documents, artwork and videos etc. that are key to business processes. It enables routing of these documents, artwork etc. to multiple stakeholders in the marketing organization and facilitates consolidation of comments received. This helps to effect action based on feedback.

Digital Library

Qualifies marketing teams and external partners to organize, share and distribute marketing content, creative artwork, photo libraries, brand identity elements (logos), print, TV & radio ads, market research documents, competitive intelligence and much more. The digital library automatically generates low-resolution representations of artwork for access via web browser & manages multiple versions of artwork.

Claims Management

Helps create an easy to maintain, easily searchable database of regulatory claims in the system. It stores detailed information on claims, validity of claims, what claims are currently in the market etc. This facilitates packaging label creation by providing accurate claim information for print.

Knowledge Manager

Enables market teams to set up interactive discussion forums on topics for collaboration among marketing teams. The marketing knowledge manager can also be integrated with the strategic planner as well as the marketing workbench to provide informal reviews and approval functionality.

Site Builder

Permits marketing managers to build and publish product related sites with sophisticated site navigation, custom page layouts, rich media and interactive discussion forums without requiring any knowledge of HTML or Internet technologies. Site builder greatly enhances collaboration between marketing, sales and customer service. In addition, brand managers can use site builder to create and publish brand sites with brand and creative guidelines.

Artwork Producer

Enables marketing teams to employ standard templates, so that brand image/identity is preserved, look-and-feel consistency is maintained and existing marketing assets are utilized well. Artwork can be easily converted into a template for future use with the help of graphical tools that allow the user to identify the textual and graphical elements that can be modified. The users can customize a template by simply supplying textual information and selecting predefined images.

Timesheets

Provides an online daily time tracking for Resources in a Marketing Organization. It allows for better accounting of actual hours spent by Resources on Marketing Activities and Projects and helps ease in cost calculation based on time spent by various Resources.

Reports

Includes pre-canned crystal reports related to planning, resource allocations, project status, budgets, content, usage audits and much more. An ad-hoc reporting tool allows for user defined reports to be created on the fly. The reports can be then exported for print or pivoting as per need.

Browser settings for using the Application

1. Internet Explorer setting for File Download:
    a. There is a setting in IE under Tools -> Internet Options-> Security Tab.
    b. Click on custom level.
    c. For Internet and Local intranet zone configure the following setting:
    Under Downloads setting, select enable option for both File Download and Automatic prompting for file downloads.

2. Internet Explorer setting for popup blocker:
    a. There is a setting in IE under Tools -> Internet Options-> Privacy Tab.
    b. On the Pop-up Blocker section turn off the pop-up blocker for the SAS Marketing Operations Management site.

Logging in SAS Marketing Operations Management

To access the SAS Marketing Operations Management application the user has to enter the site address in the internet browser. A login screen is displayed where the user can enter username and password. Click on the '**Sign In**' button to log into the application **(Figure 1)**.

Note: Only the registered user can access the application.

Figure No.1

Remember Me

If this option on the login screen is checked the first time then the system remembers the user's credentials. The user does not need to enter the user credentials the next time to access the system.

Forgot Password

To retrieve a forgotten password click on the '**Forgot Password?**' link, on the login page **(Figure 1).** A forgot password screen is displayed **(Figure 2).**

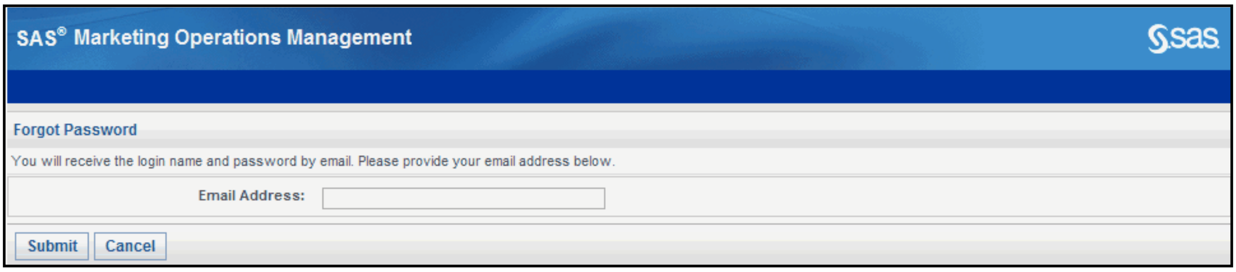


Figure No.2

The user needs to enter the email address and click on the '**Submit**' button to submit the request. A notification will be sent to the system and the password will be notified to the user by email.

Register Now! - Registering as a new user

A new user can register by clicking on the '**Register Now**' link **(Figure 1).** A user registration screen is displayed **(Figure 3).**

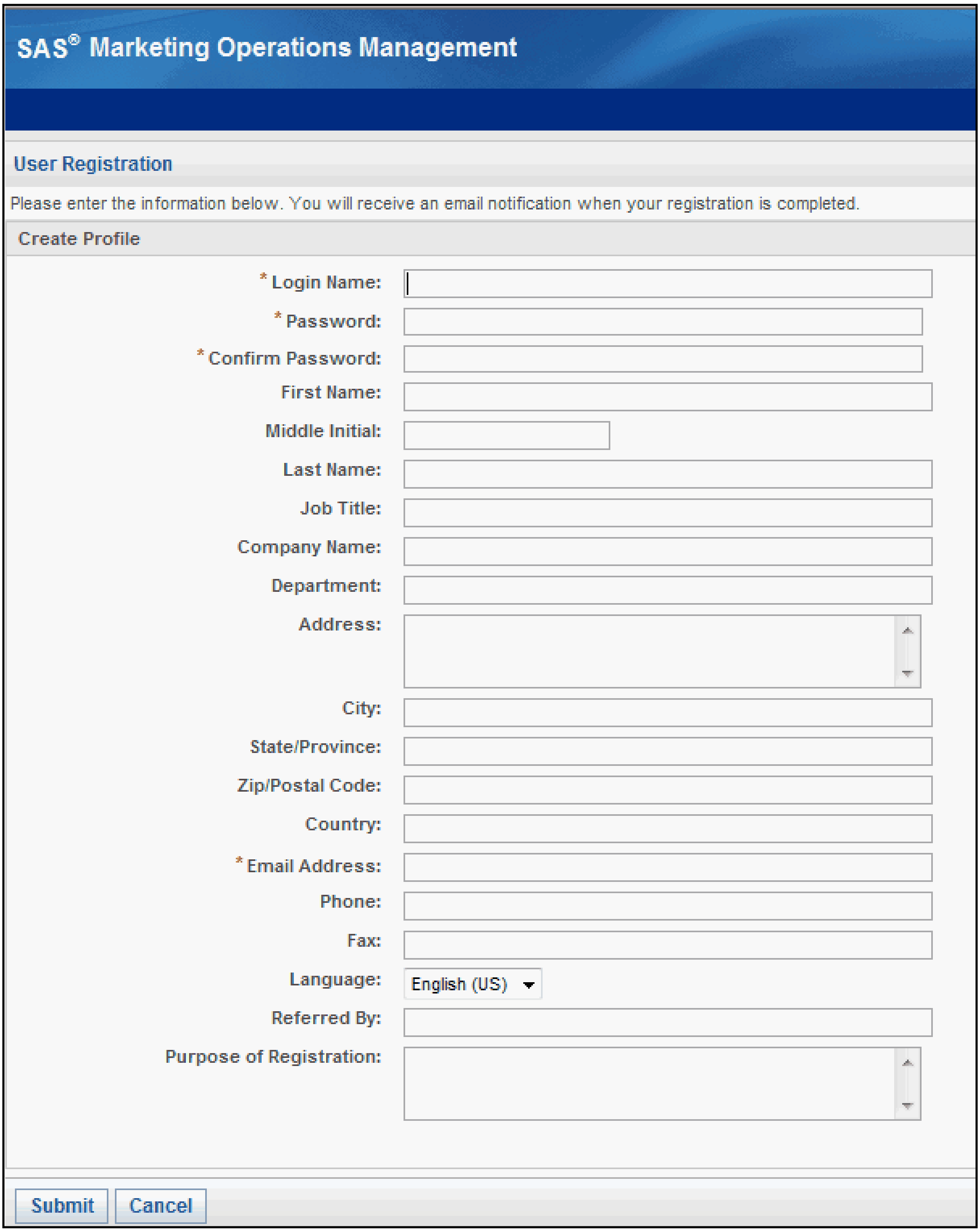


Figure No.3

The user can fill in the details and click on the '**Submit**' button to submit the registration request. A notification will be sent to the system administrator who will register the user. The user will be notified by email once the administrator accepts/rejects the registration.

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.

Contact Us

Click on '**Contact Us**' link, on the login page **(Figure 1)** to contact SAS. The addresses and contact information of our various offices are displayed.

What you see on the Screen?

On successful login, the dashboard is displayed to the right of your screen.

The left pane consists of three menus:

- **MOM (Marketing Operations Management)** - Solutions such as the dashboard, strategic planner, marketing workbench, approvals, digital library, marketing knowledge manager, site builder, artwork producer and reports are listed under this menu. Based on the access control the user can access the solutions by clicking on the relevant link **(Figure 4)**.

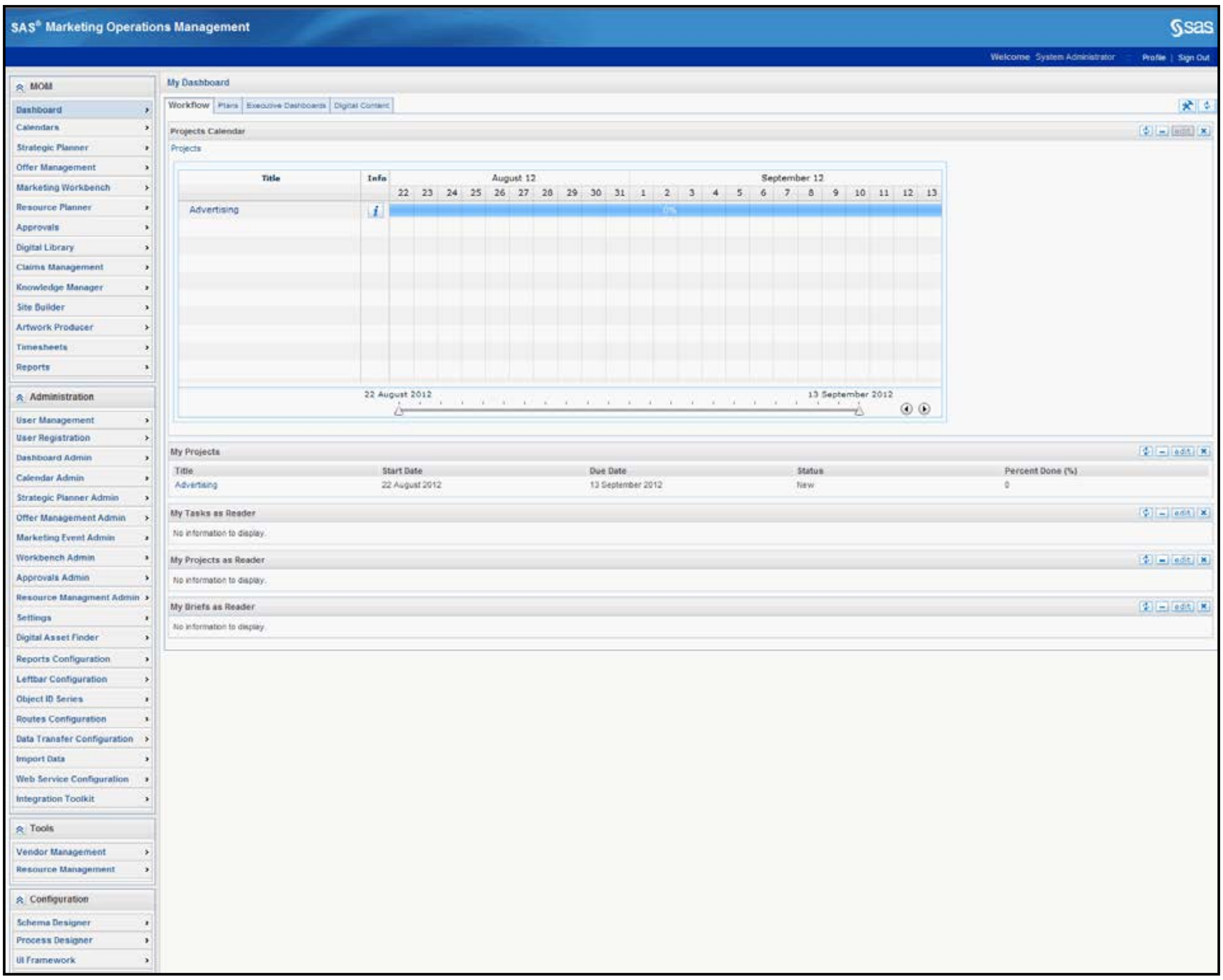


Figure No.4

The following sections are visible only to the administrator:

- **Administration** - The utilities such as user management, user registration dashboard admin, strategic planner admin, workbench admin, settings, digital asset finder, reports configuration and leftbar configuration are listed under this menu.
- **Configuration** - The configuration utilities such as schema designer, process designer and UI framework can be accessed from this menu.

Profile - User profile or password

To edit the profile, click on the '**Profile**' button on the top right corner of the dashboard screen **(Figure 4).** A user profile screen is displayed **(Figure 5).**

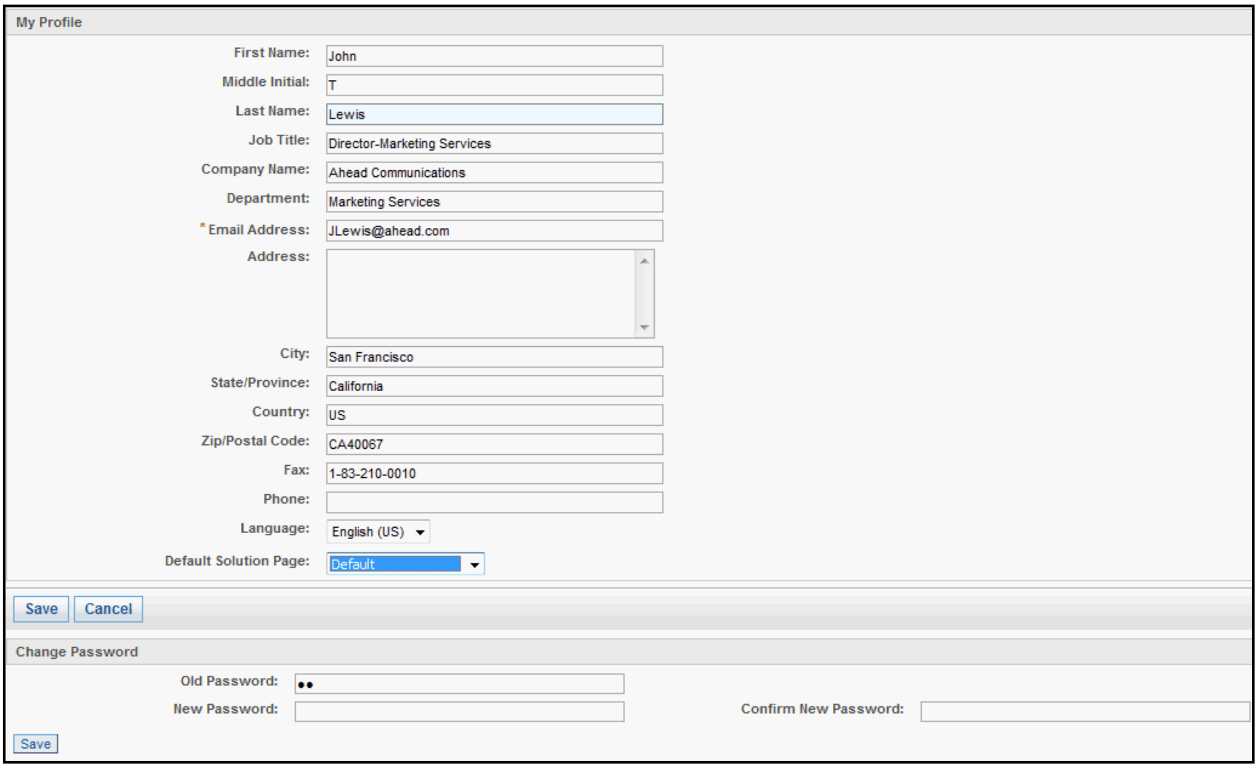


Figure No.5

The necessary changes can be made in the profile or password can be changed and saved by clicking the '**Save**' button.

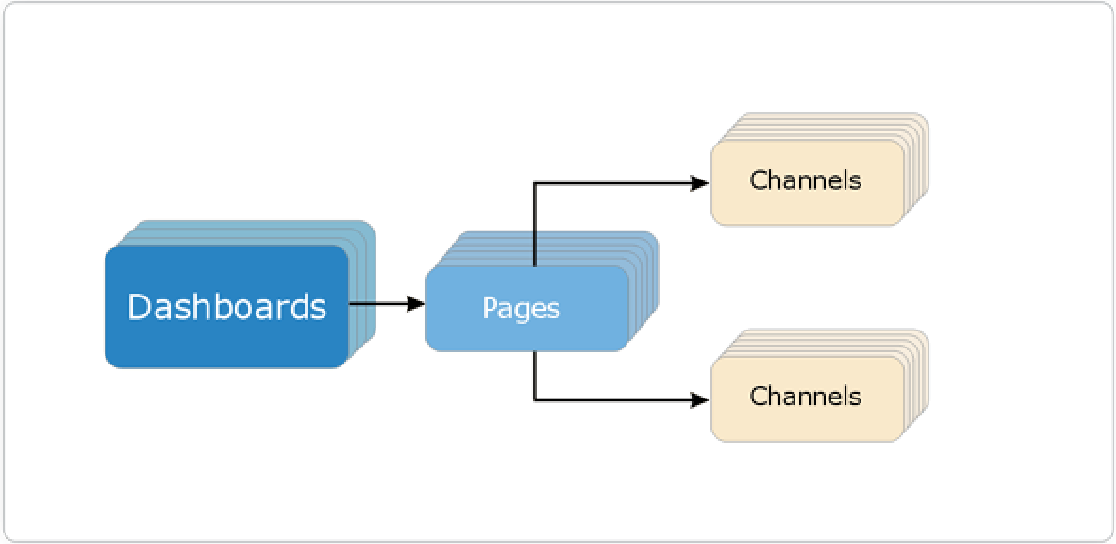
Sign Out

Click on the '**Sign Out'** on the top right corner of the dashboard screen **(Figure 4)** to safely log out of the system. The system displays a logout message.

Note: It is advisable to logout of the system using the '**Sign Out**' link at all times instead of closing the browser window.

Dashboard

Overview



SAS Marketing Operations Management's marketing dashboard enables implementation of dashboards that show summarized information on strategy, plans, budgets, workflow and digital content.

The marketing dashboard represents a single point of access to the rich functionality of the SAS Marketing Operations Management solution and can be personalized to satisfy each user's preferences. It is also used to post the latest news, upcoming events and provide links to relevant websites.

The information on the dashboard could be displayed in a single default page known as 'My Page' or distributed over multiple pages. Related information could be clubbed under a single page. The pages on the dashboard can be configured by the administrator only.

Glossary of terms

On **Figure 1**:

1 **Channels -** Channels are ways of distributing and receiving information in the SAS Marketing Operations Management system. When any information is published on a channel, all the groups who have access to the channel will be able to view the information.

2 **Pages -** Pages are logical grouping of channels. They allow the user to categorize channels based on the content. E.g. a workflow page can be configured to display channels providing information about the user projects, pending tasks, pending briefs and other related process.

3 **My Page**: 'My Page' can be customized by the user by adding any channels to which the user has access to. The user has restricted access to other pages. This is basically a feature that allows the end user to get all its relevant data on one single page instead of traversing to multiple pages.

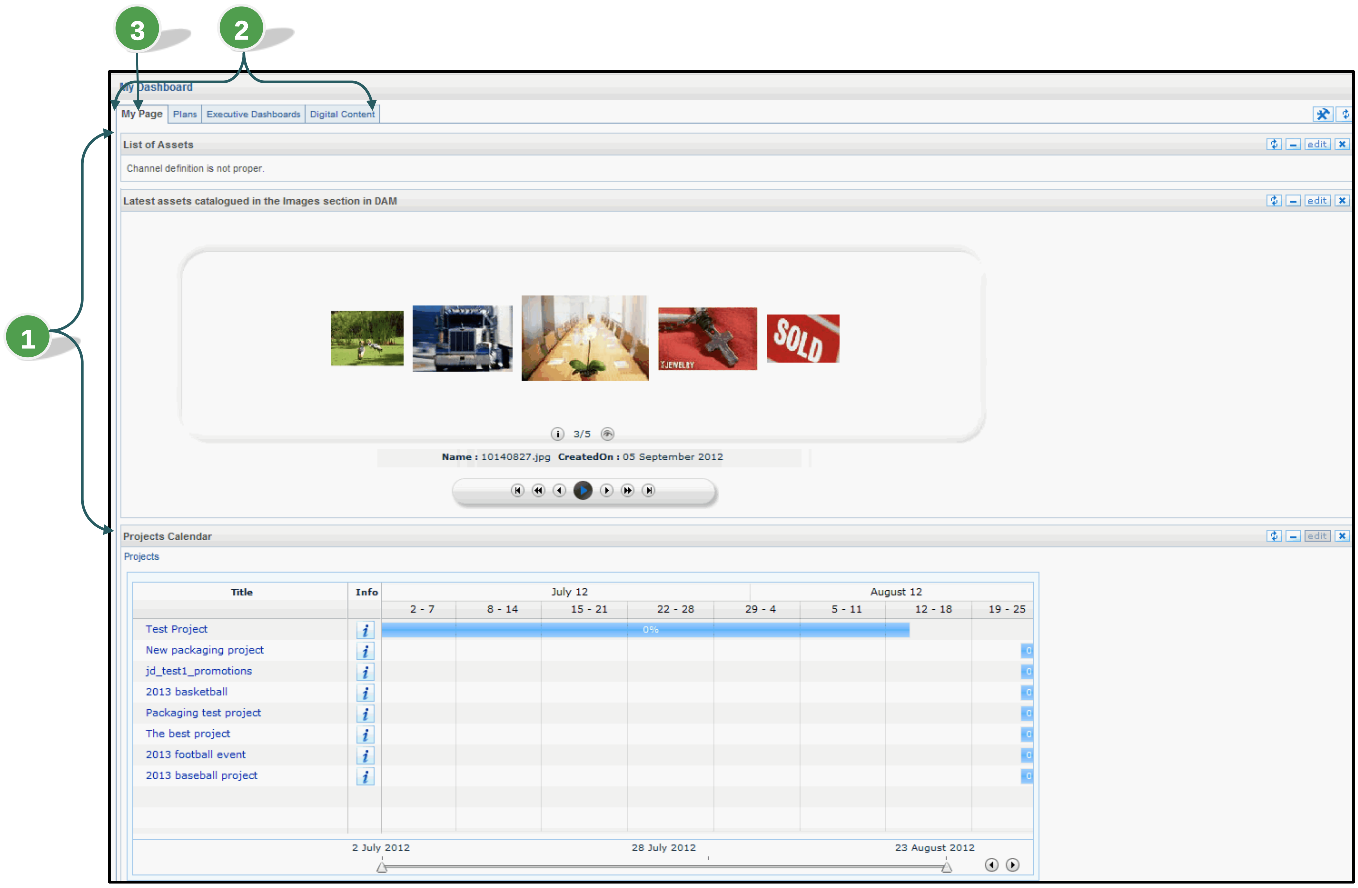


Figure No.1

Getting Started

After signing in, the dashboard is displayed by default as shown in **(Figure 2)**.

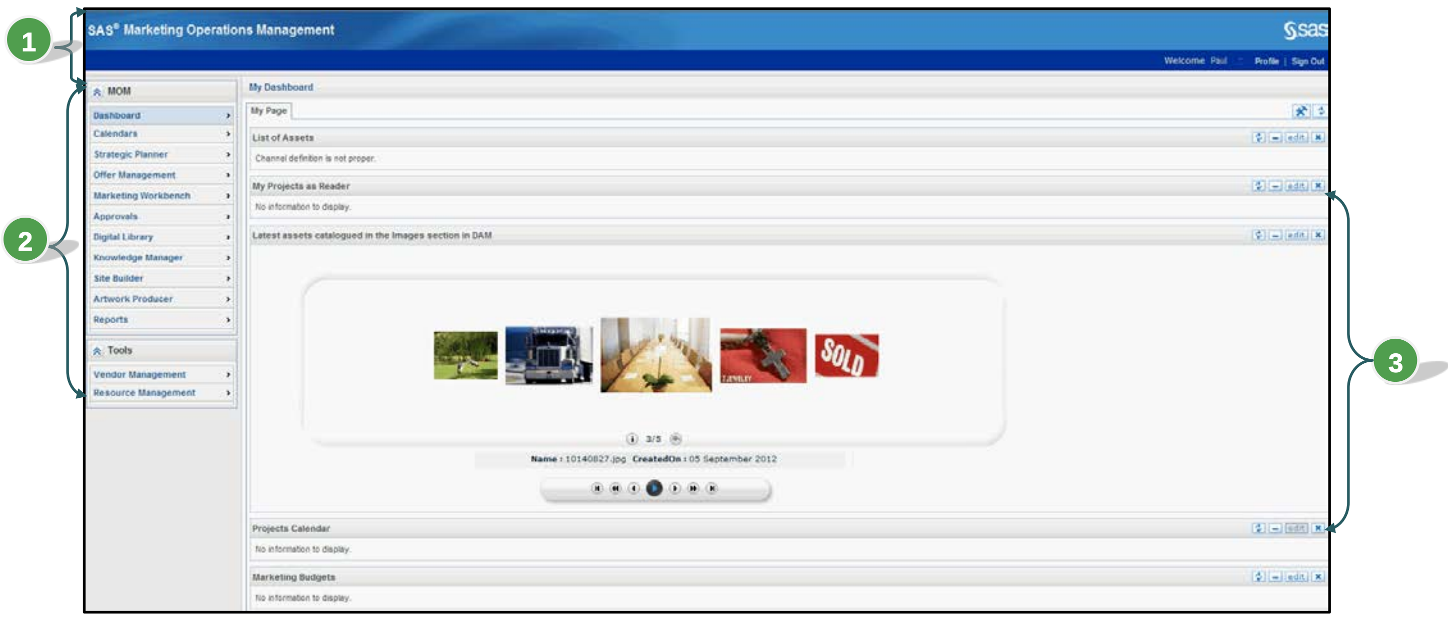


Figure No.2

1 **Top Bar** has the company logo and links such as:

- **Profile** - Allows the user to change the profile.
- **Sign out** – The user can log out of the solution.

2 **Left Pane (MOM)** has links to different applications such as dashboard, strategic planner, marketing workbench, approvals, digital library, knowledge manager, site builder, artwork producer and reports.

3 **Content Frame** displays a configured dashboard with configured pages. 'My Page' is the default page and has a list of channels selected by the user. At the top right corner of each page there are two buttons **(Figure 3)**:

	Personalize – Selects the channels for the pages.		**Refresh** - Refreshes the page content.

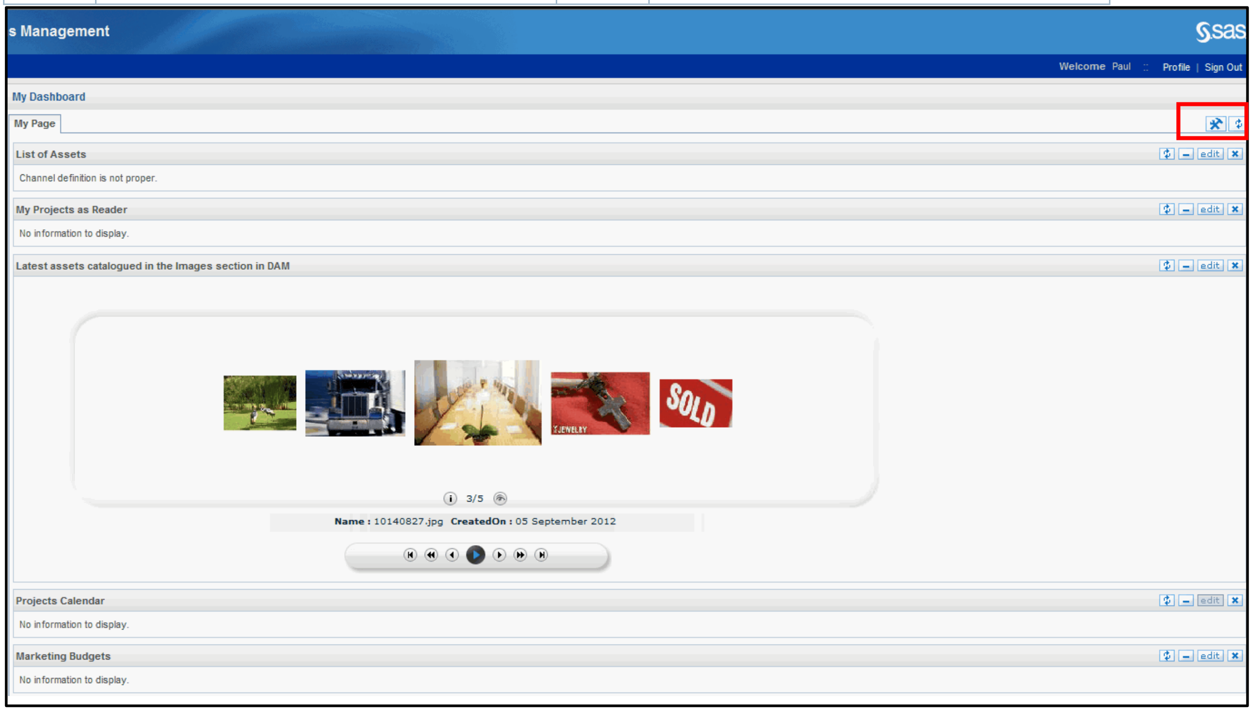


Figure No.3

Channel Selection and Layout

The channels are laid out on a page in a sequence desired by the user. The user can add additional configured channels or remove the channels from the page. The user can also select the sequence of display for each channel on the page.

Selecting channels for the page

To select channels click on the button on the top right corner of the page. A channel layout screen is displayed. The popup has a tabbed display of the pages with the current selected page. Each page lists the channels selected **(Figure 4).**

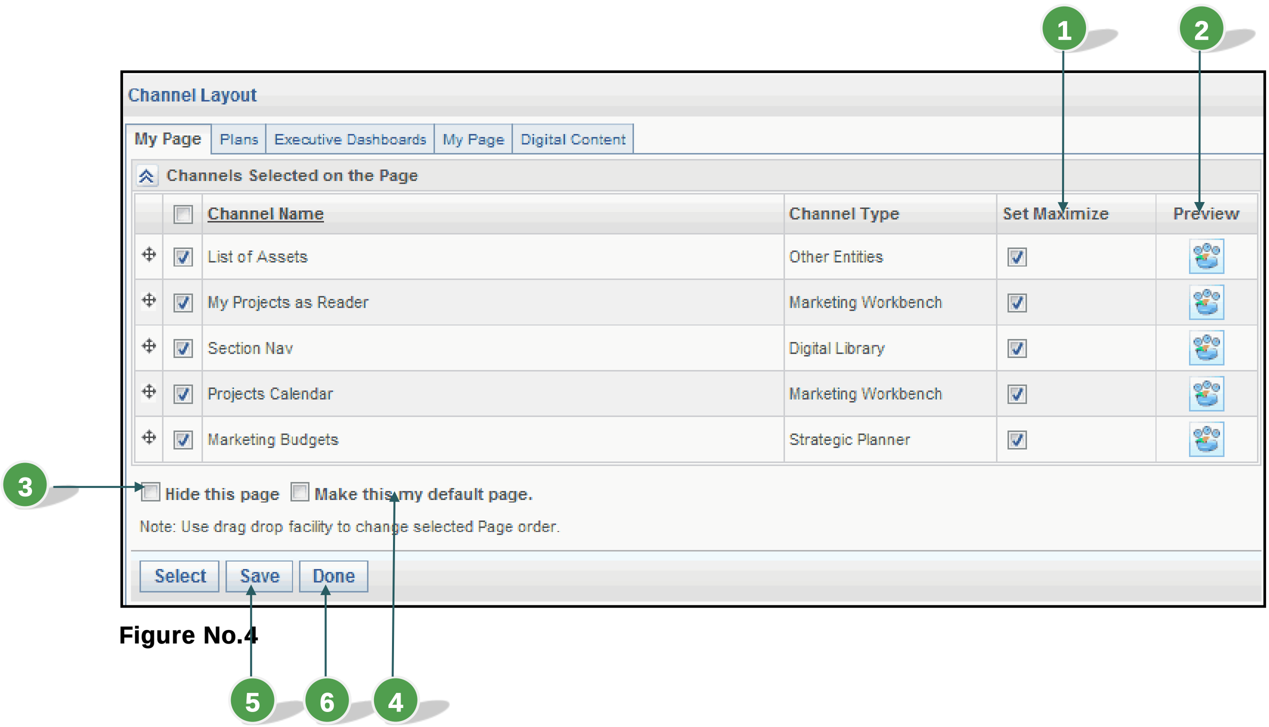


Figure No.4

1	**Set Maximize** – Shows each channel in the maximized state.	2	**Preview** – Shows the preview of the channel by clicking on the button.
3	**Hide this page** – Hides the page on the dashboard.	4	**Make this my default page** – The selected page will be shown as the default page when the user logs in.
5	**Save** – Saves the changes made by the user.	6	**Done** - Closes the popup.

On the same popup the user can order the pages displayed on the dashboard by the 'Drag and Drop' method.

Sequencing the channel layout on My Dashboard screen

To sequence the channels on the page, the user can use the 'Drag and Drop' feature to position the channels at the appropriate location. Select a channel by clicking on the channel title. When a four arrow icon appears, the channel can be dragged to the desired location by keeping the left mouse key pressed and when the dotted lines appear, release the mouse button. This will position the channel in the desired sequence **(Figure 5)**.

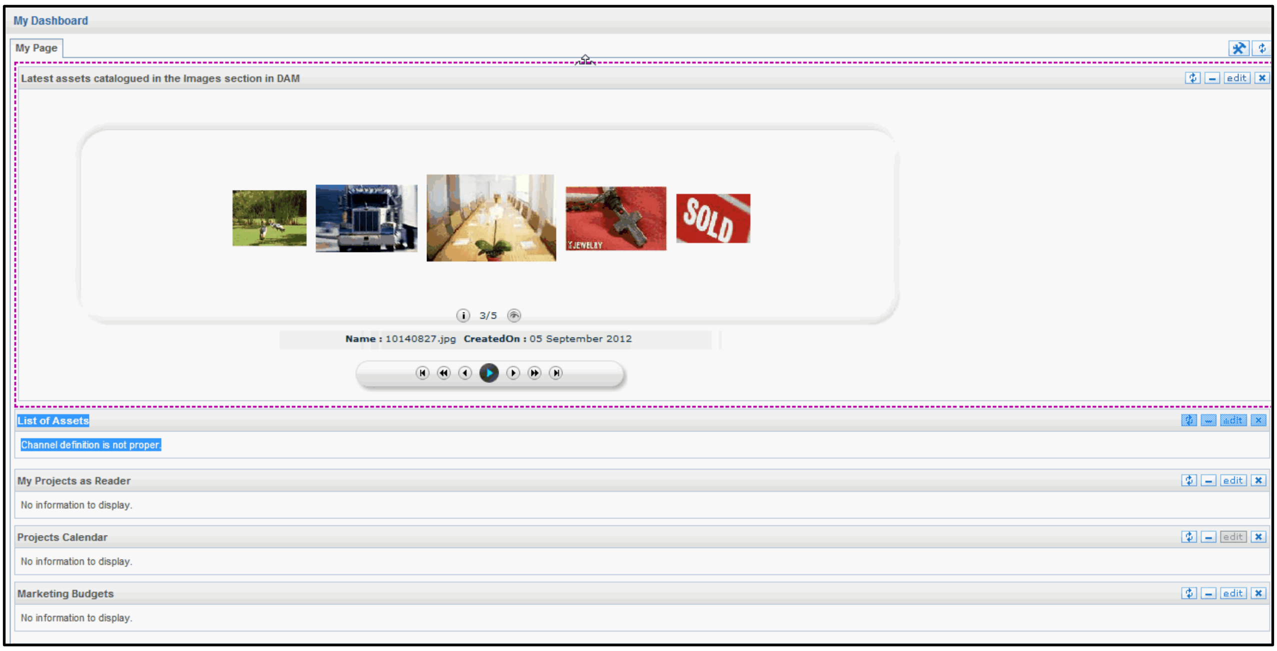


Figure No.5

Operations on a channel

A channel appears as a window on the page. A channel consists of a header with the channel title and the content area as shown in **(Figure 6).**

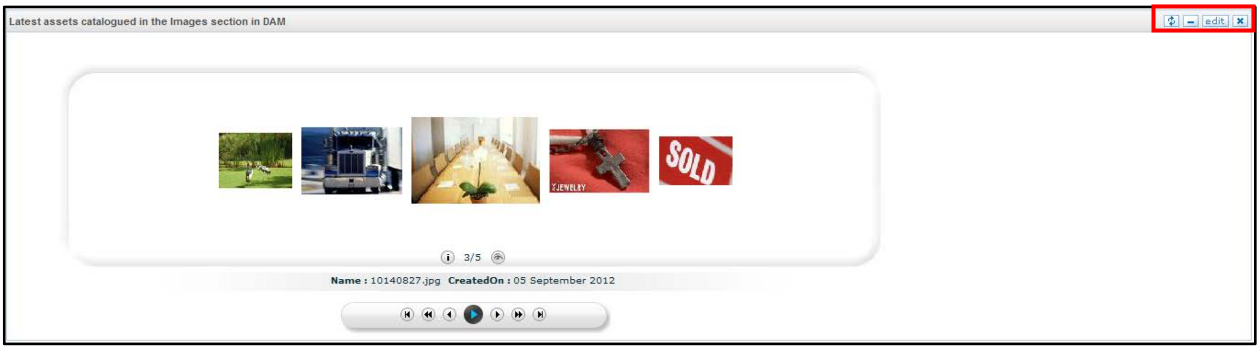


Figure No.6

	**Refresh** - Refreshes the channel content.		**Minimize** -Minimizes a channel, when in the maximized state. Visible only if the channel is in the maximized state.
	**Edit -** To personalize the channel content.		**Maximize** - Maximizes the channel when in the minimized state. Visible only if the channel is in the minimized state.
	**Close** – Deletes the channel from the page.		

Channel Personalization

When the user clicks on the edit button, a channel personalization popup is displayed. The user can personalize the channel according to the user's requirements provided the administrator has allowed personalization.

For example:

1. On a Marketing Plan channel the user could select which plans should appear on the Dashboard **(Figure 12)**:

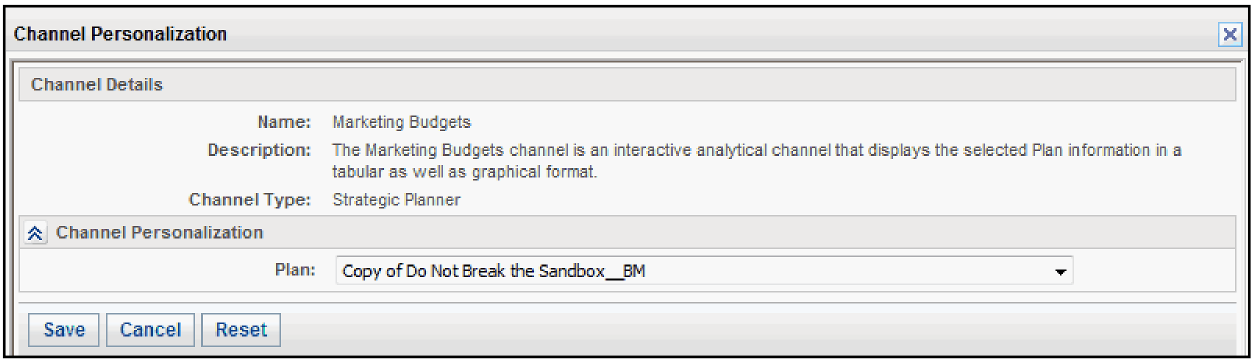


Figure No.7

2. On a Digital Library channel where assets from a certain section are displayed, the user can select the subsection within the specified section from where the assets should be displayed

Note: The channel personalization feature is not applicable for static and links channels.

Settings to be done for Static channels

For a static channel if a Microsoft Office file has been uploaded and the user tries to view it, the file may not be viewed in the browser but the user will be asked if the file needs to be downloaded or saved. This happens if the registry key 'BrowserFlags' is absent or the value for it is wrong. Follow the steps below to check the registry key:

1. Go to Start | Run and type 'regedit' and click 'Ok'.
2. The registry editor screen is displayed. Go to HKEY_LOCAL_MACHINE\SOFTWARE\Classes\Excel.Sheet.12.
3. Click on the 'Excel.Sheet.12' and check if the 'BrowserFlags' key is present and the value is '0'.
4. If not present then right click on the right side of the screen and click on 'New' and select 'DWORD Value' and name the key as 'BrowserFlags'.
5. Double click on the key and check the value data. It should be 0 for Windows 7 and Vista and for the rest it should be 8.

This ensures that the Microsoft Office files in a static channel will be viewed in the browser.

Operation on the Analytical Channels

For Strategic Planner

A marketing plan channel, a breakup of planned and spent amounts channel and a marketing calendar channel are system channels created by the administrator for strategic planner. These channels display the plan information in a tabular as well as graphical format.

The following information can be viewed for the analytical channels:

Breakup of Planned and Spent Amounts (Financial Summary): This channel displays the following information in a graphical format:

- Cost center wise breakup of the planned amount for the selected plan.
- Activity type wise breakup of the spent amount for the selected plan.
- Cost category wise breakup of the spent amount for the selected plan.

Marketing Calendar: The marketing executives can see their marketing calendar on the dashboard as soon as they log in without having to go into the strategic planner module. The user has the flexibility to explore deeper via the interactive clicking facility in this channel.

In this channel the following information is displayed:

- The Plan Name - The user can click on the plan title to view the plan/program/activity details.
- A Gantt chart view of the activity types in the plan/programs/activities is displayed with the activity type name on the Gantt chart bar. When the user drags his mouse over the Gantt chart bar summary information of the activity type such as start date, end date, budgeted, committed, spent and the unspent amounts can be viewed.
- A slider below the Gantt chart to adjust the time period of the display.

Marketing Plans: In this channel, the following information will be displayed in a graphical format:

- The content frame will display the plan name and the business unit for the plan.
- A pie chart representation of the unspent, committed and the spent amounts for the plan will also be displayed. Click on the committed amount section for a list of all the commitments for the plan and all levels below it. Click on the spent amount section for a list of all the invoices for the plan and all the levels below it. Click on the unspent amount section for a list of the entire unallocated amount for the plan and all the levels below it.
- The user will view the list of programs/campaigns associated with the selected plan in tabular format. The program title, budgeted, committed, spent and unspent amounts are displayed for the list of programs/campaigns of the plan.

The user can view the information in the form of a pie chart, bar chart or in the list view by clicking on the relevant button.

The user can traverse to a particular plan by clicking on the info icon and drill down to view the activities associated with it. Similarly the information at the program/campaign level is also displayed in a similar format.

For Marketing Workbench

A projects calendar displays 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.

Projects Calendar: In this channel the following information will be displayed in a graphical format:

- When the mouse is dragged over the Gantt chart bar the summary information of the project such as start date, end date and priority is shown to the user. For the part of the bar that is completed, there could be summary information such as the % complete that is displayed on the bar.
- The user can drag the slider for a monthly, weekly and a daily representation of the projects Gantt chart bar.

- Click on the project to see list of deliverables with Gantt chart view. Breadcrumbs get updated. Click on the ‘Info’ icon to navigate to the project details screen on the marketing workbench.
- Click on the deliverables to see the list of tasks. Breadcrumbs get updated. Click on the ‘Info’ icon to navigate to the deliverables details screen on the marketing workbench.
- Click on the task or the ‘Info’ icon to navigate to the task details screen on the marketing workbench.
- The user can navigate through the channel and go to the marketing workbench for the detailed work.

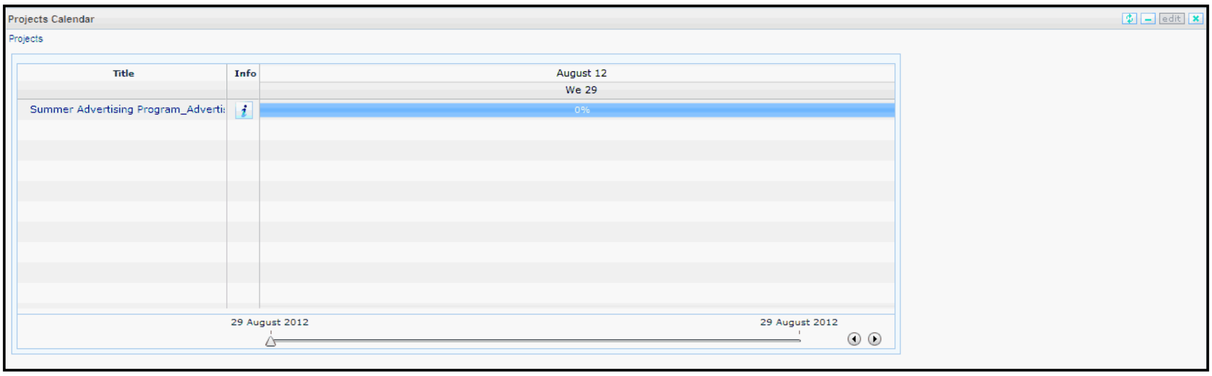


Figure No.8

Operations on Digital Library channels with the carousel view

The carousel view asset viewer enables the users to view the digital assets in a carousel view. The users can see their digital assets on the dashboard as soon as they log in without having to go to the digital library module. The users have the flexibility to explore deeper via the interactive clicking facility in this channel achieved through the ‘Flex’ technology.

The following information can be viewed for the digital Channels with the carousel view:

Section navigation (Figure 9): In this channel the following operations can be performed:

1 Click on this button to get a drop down list of the subsections, which the user can click on to traverse the section.

2 The asset information of the highlighted asset is displayed in an information bar.

3 Clicking on this icon the user can view the asset information.

4 The asset count is displayed.

5 Clicking on this button the user can download the preview.

6 An action bar to allow the user to view next/previous/first/last asset etc.

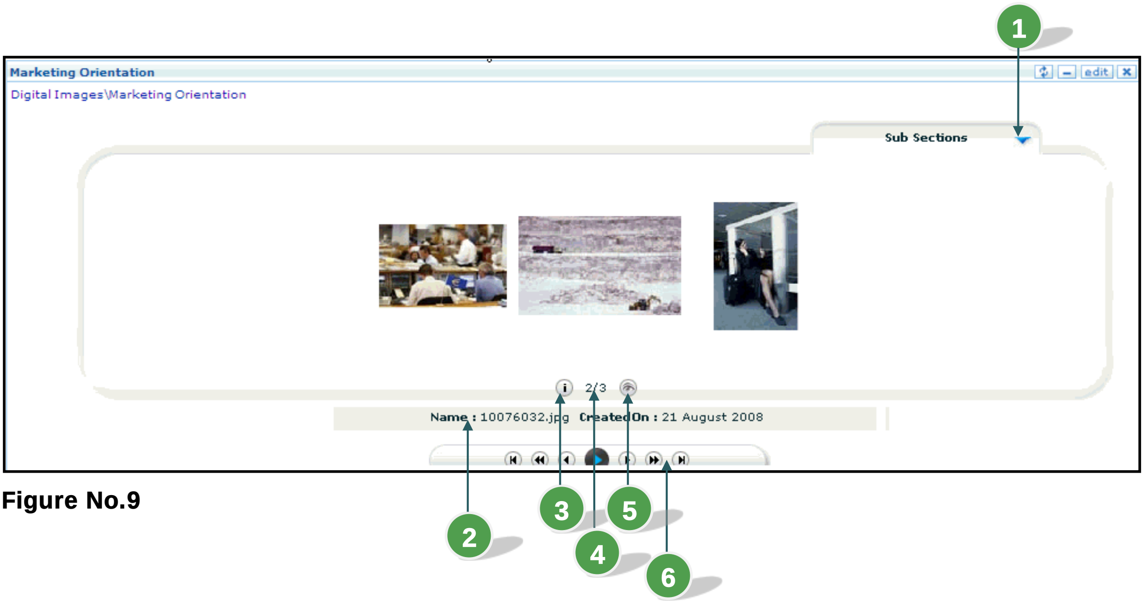


Figure No.9

Asset navigation (Figure 10): In this channel the following operations can be performed:

1 A tool tip is displayed on a mouse over to display additional information of the asset.

2 This is an option to navigate to the asset of choice directly.

Rest all the functions are the same as the section navigation.

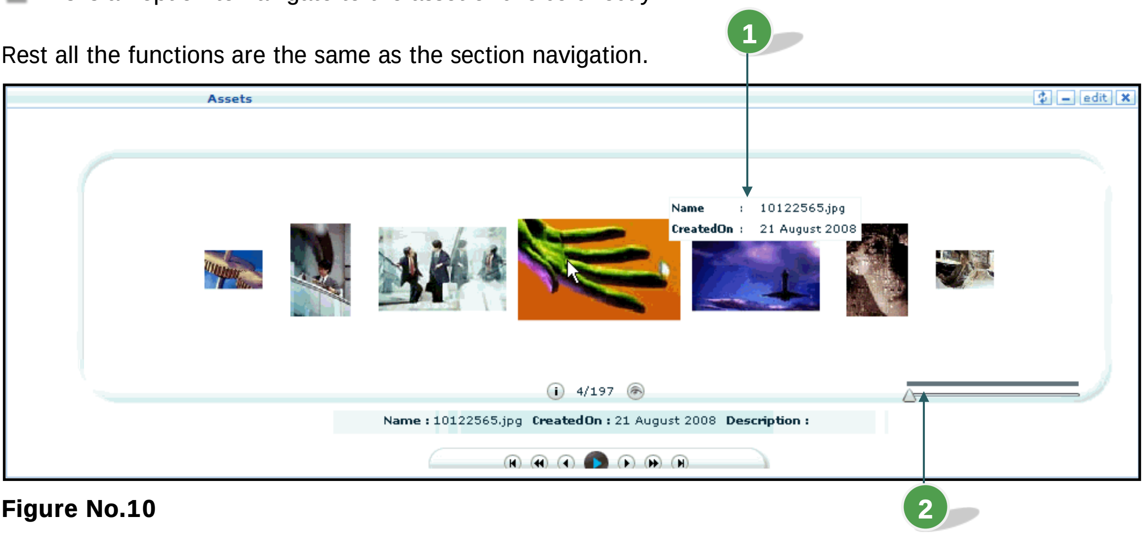


Figure No.10

Note: In case expired assets are displayed the asset operations are limited.

Operations on the Artwork Producer channel with the carousel view

The artwork generators can now see their formats on the dashboard as soon as they log in without having to go to the artwork producer module. The formats viewer channel enables the users to view the formats that are released in the artwork producer module in a carousel view or a list view.

The channel enables the users to not only to navigate and view the formats in these modes but also allows the user to click and select a format and go to the customization screen.

Rest of the operations is similar to the digital library carousel view channel.

Operations on the Task Calendar

The Dashboard displays a calendar view channel of the tasks and the approvals jobs assigned to the logged in user for the current month. The task appears as a bar stretching from the start to end date of the task.

Clicking on the task bar takes the contributor to the response screen of the task. The task links appear on the start date of the task against the appropriate date. All the tasks assigned to the user are seen on the dashboard channel. It shows the tasks of different statuses such as the tasks that are scheduled (not started), in progress, delayed and completed in different colors (See Legend on the task calendar). E.g. Green indicates in progress tasks, red indicates delayed tasks. A mouse over the task links displays details of the task such as start date, due date and instructions. The user can click on the link of the task to go to the task details screen. This channel cannot be personalized.

Operations on the Executive Dashboards

All the users in an Executive User group have access to these dashboards; the users who have access to the Plans will have access to the appropriate dashboards.

Note: Since the data calculations will be time consuming, the chart and the drill-downs will show the data as of previous day (or as the frequency of running the stored procedure is configured).

The Executive Dashboard is displayed with first level of charts. The following operations can be performed on the Dashboard:

- **Filters** – The Executive user can select the Fiscal Year and Business Units for which the dashboard is to be displayed. Once the filters are selected, the corresponding dashboard is generated. The user can change the filters to get different dashboards.
- **Dashboard** – Four individual charts are displayed on the Dashboard using the filters specified by the user. The charts are explained in detail below. In addition to the selected Fiscal Year and the Business Units, the date and time when this dashboard was generated, also indicating the last time the data used in this dashboard was refreshed is displayed.

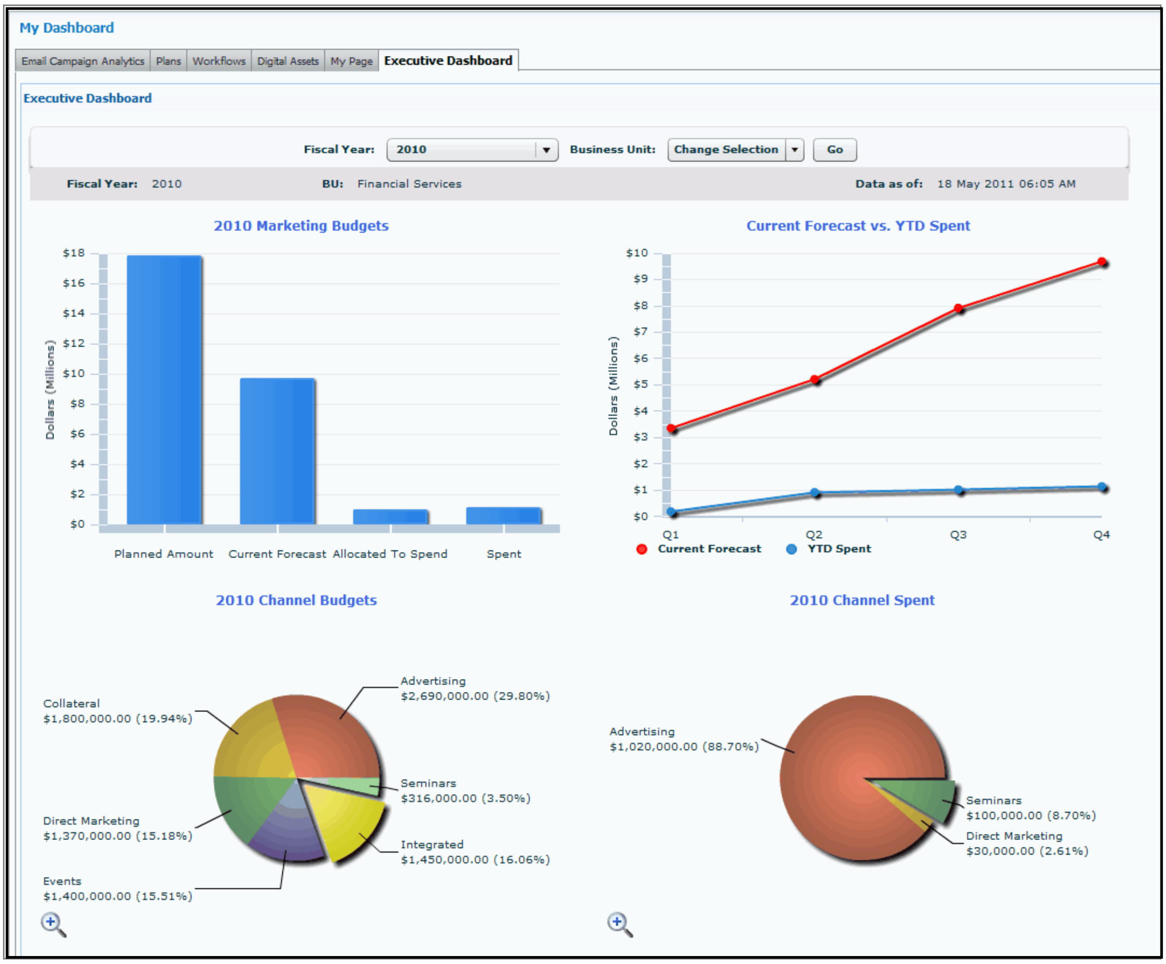

My Dashboard
Email Campaign Analytics
Plans
Workflows
Digital Assets
My Page
Executive Dashboard
Executive Dashboard
Fiscal Year: 2010
Business Unit: Change Selection
Go
Fiscal Year: 2010
BU: Financial Services
Data as of: 18 May 2011 06:05 AM
2010 Marketing Budgets
Current Forecast vs. YTD Spent
Dollars (Millions)
Planned Amount
Current Forecast
Allocated To Spend
Spent
Q1
Q2
Q3
Q4
Current Forecast
YTD Spent
2010 Channel Budgets
2010 Channel Spent
Collateral $1,800,000.00 (19.94%)
Advertising $2,690,000.00 (29.80%)
Seminars $316,000.00 (3.50%)
Integrated $1,450,000.00 (16.06%)
Direct Marketing $1,370,000.00 (15.18%)
Events $1,400,000.00 (15.51%)
Advertising $1,020,000.00 (88.70%)
Seminars $100,000.00 (8.70%)
Direct Marketing $30,000.00 (2.61%)

Figure No.11

The following charts are displayed:

1. **Marketing Budgets**: This chart **(Figure 12)** displays the budget for the selected business unit(s)/plans. This channel provides a summarized view of the Annual Plan amount, Current Forecast, Committed Budgets and Actuals (for approved budgets) for a selected set of Business Units/Line of Business/Plans for a specific year. It is a roll up for the Business Unit with its associated hierarchy or individual Line Of Business Plans, as per the filters selected by the user. On a mouse over the bar graph, the amount will be displayed.

   The increments in the chart will depend upon the lowest and the highest values to be displayed. If the highest value is in millions, then the Y-Axis will display Dollars (Millions) else will display Dollars (Thousands).

   Note: If a hand tool is displayed on a mouse over, it means the user can drill down further into the spends by clicking on the graph. The details will be displayed in a popup. If the selected fiscal year is the current fiscal year, then the quarterly breakup is shown only till the current quarter. For e.g. if the current quarter is Q1, the other quarters Q2, Q3 and Q4 will not be shown.

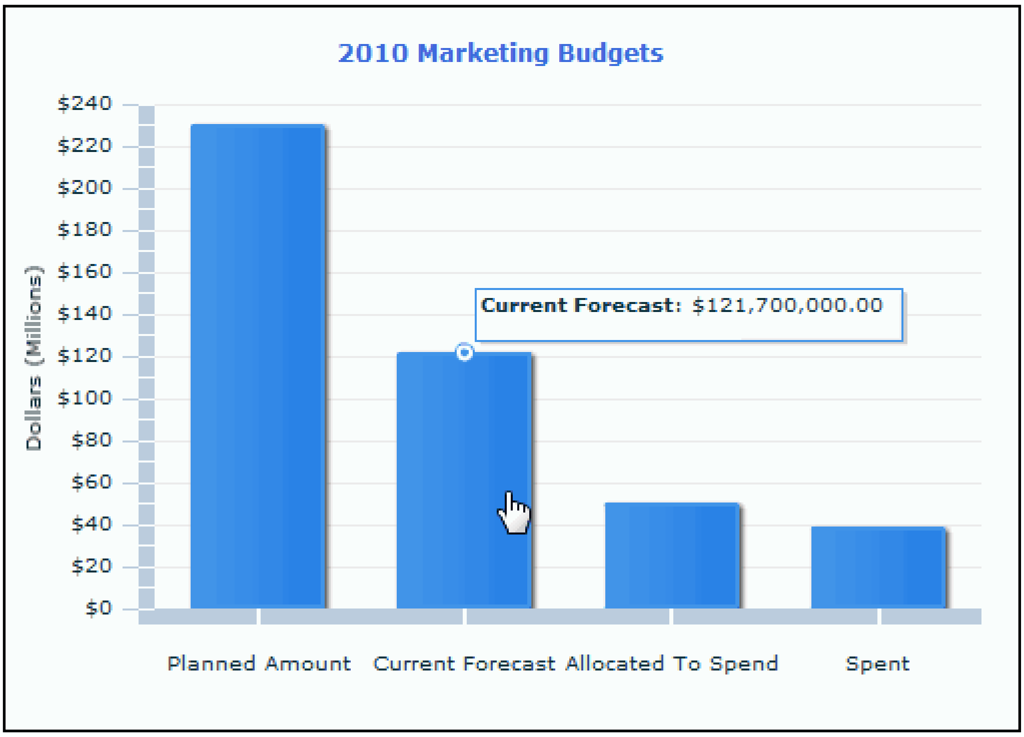


Figure No.12

2. **Current Forecast vs YTD Spends**: This channel **(Figure 13)** provides a cumulative view of the Business Unit/Line Of Business/Plan's current forecasts and spends over time. The increments in the chart will depend upon the lowest and the highest values to be displayed. If the highest value is in millions, then the Y-Axis will display Dollars (Millions) else will display Dollars (Thousands). The Current Forecast amount displayed here is summarized at the level selected for the Executive Dashboard and displays the Year-to-Quarter (YTQ) Current Forecast amounts, cumulated from the beginning of the year. Similarly, it displays cumulative Actuals as the YTQ Spends. This is summarized across all the applicable Plans. The data for the actual will be counted in the quarter in which the data entry falls. If the entry corresponds to

Dec 20, 2011, it will be counted in 2012 Q1.

Note: No drill down shall be supported for this channel.

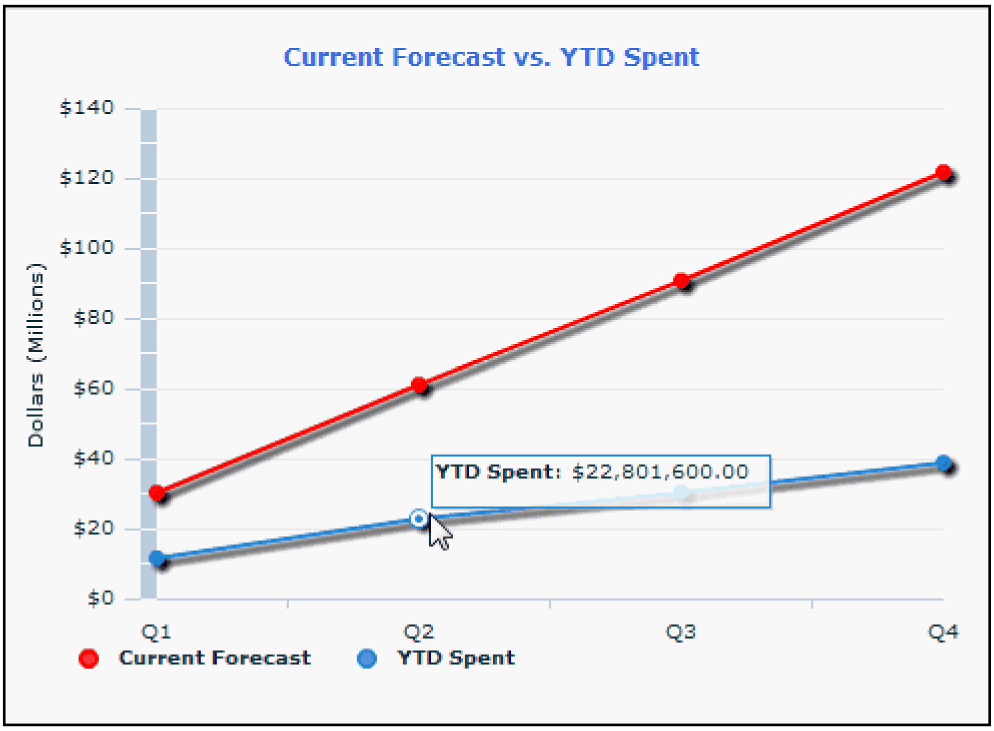


Figure No.13

3. **Channel Budgets**: This channel **(Figure 14)** provides a summary of the Current Planned channel budgets for the selected Business Unit and associated hierarchy or Line Of Business(s) for the selected year or for a single Plan selected by the user. It gives a view into the funds available for a channel that can be further divided across various Programs and Campaigns. If the user selects a Business Unit at a higher level, a sum of all Activity type from all lower level Business Unit hierarchies and Plans will be displayed. The information displayed here is an aggregation of the Current Planned amounts for all the activity types across all the selected set of BU/LOB/Plans of the selected fiscal year. By clicking on the  icon the user can view a magnified view of the chart.

Note: No drill down shall be supported for this dashboard channel.

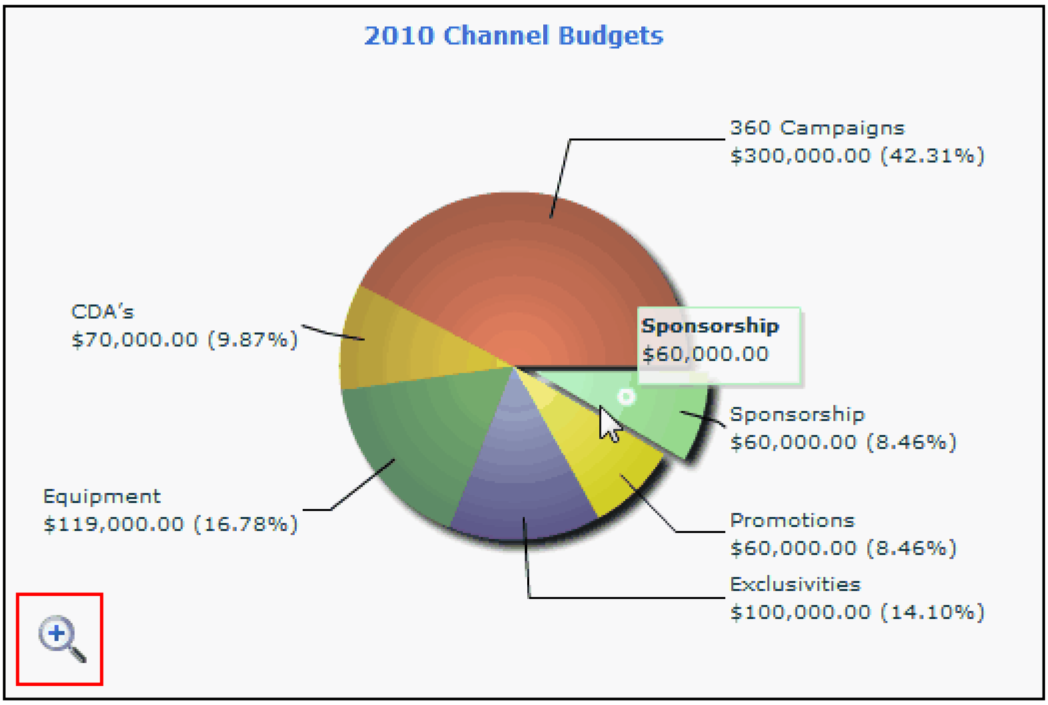


Figure No.14

4. **Channel Spent**: This channel **(Figure 15)** provides a summary of the channel Spends (Actuals) for the selected Business Unit and associated hierarchy or Line of Business for the selected year or for a single Plan selected by the user. It is an aggregation of Actuals (Spent for approved budget) for all the activity types below the Plan or Line of Business. If the user selects a Business Unit at a higher level, a sum of Actuals for all Activity type from all lower level Business Unit hierarchies and Plans will be displayed. Negative numbered Activity types are excluded from the pie chart. The information displayed here is a roll up of the Spends (Actuals i.e. invoiced amount) for all the channels (the activity type and associated activity sub-types) related activities across all the programs, for the selected set of Business Units/Line Of Business/Plans of the selected fiscal year. By clicking on the  icon the user can view a magnified view of the chart.

   Note: If a hand tool is displayed on a mouse over, it means the user can drill down further into the spends by clicking on the graph. The details will be displayed in a popup**.**

   A first level drill down will display the aggregated Actuals (i.e. spent amount) per activity sub-type when a user clicks on the activity type on the channel. Negative numbered Activity types are excluded from the pie chart. Further drill down from the sub-activity type will provide cost-category breakdown of the actuals.

   Note: In the case of Direct Marketing, which does not have any sub-activities, first level drill down will directly show the Cost Category break down.

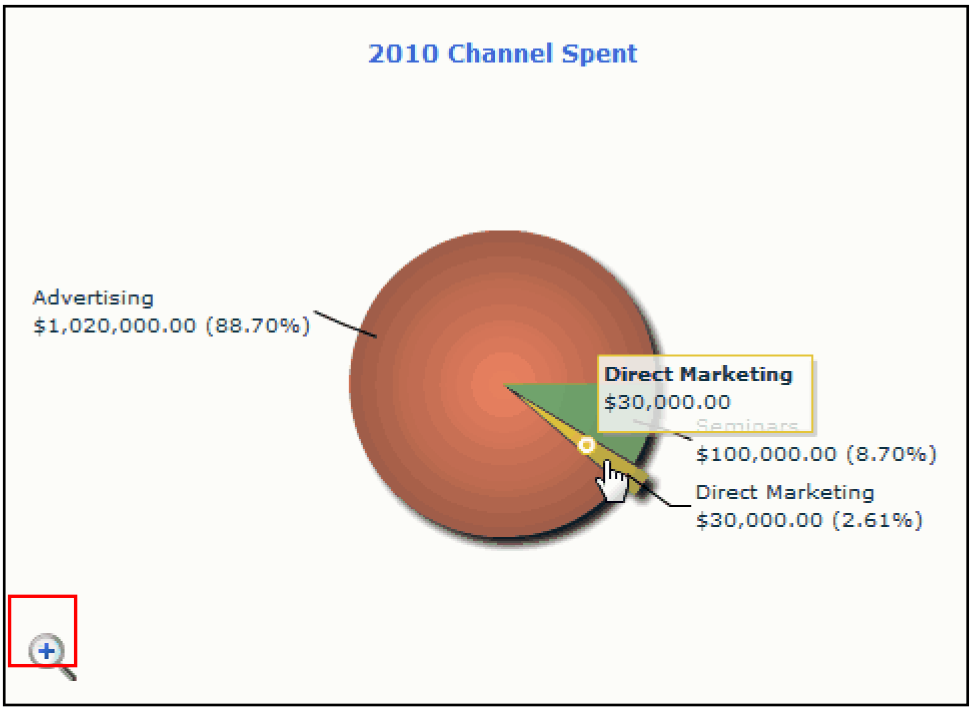
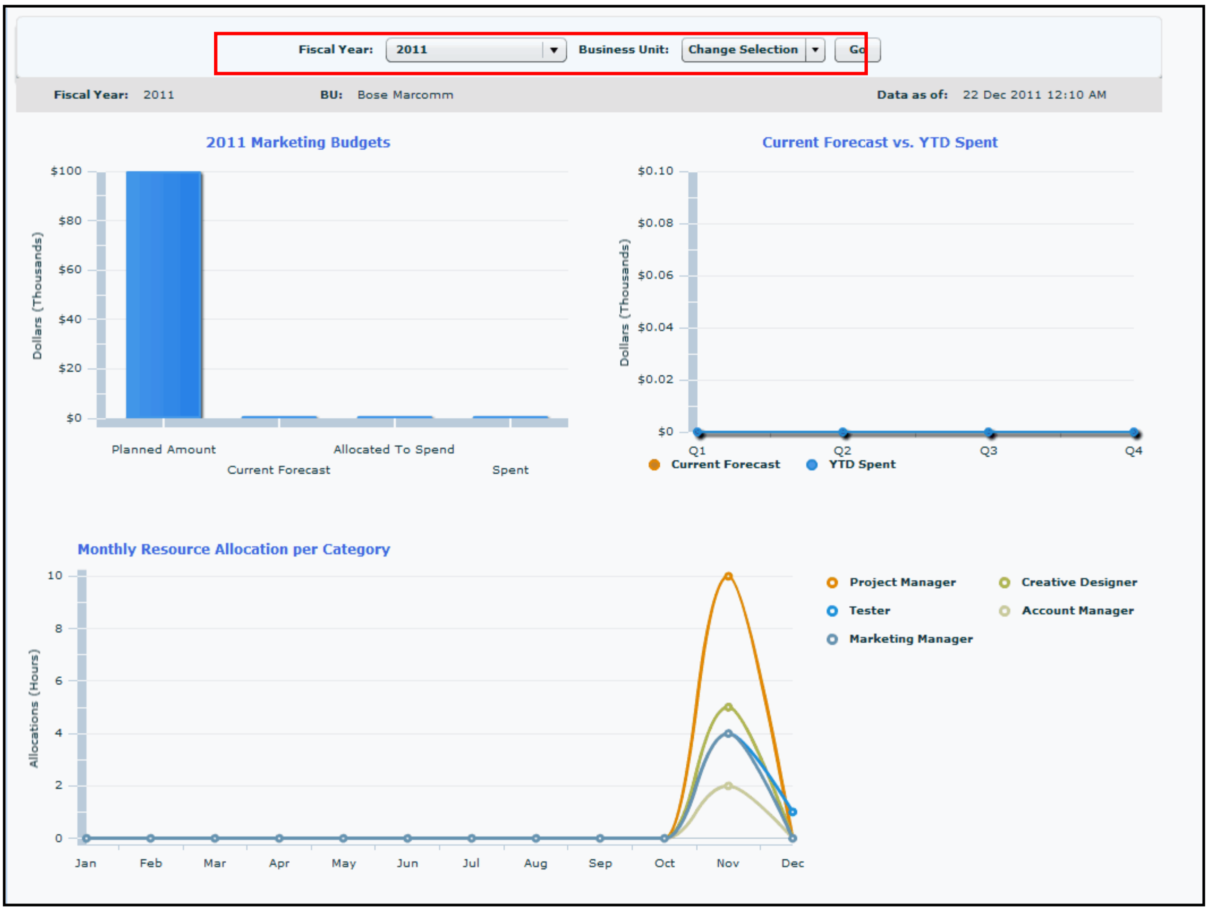


Figure No.15

5. **Monthly Resource Allocation :** As a senior executive of the marketing organization, you would like to view the monthly allocations of resources by category allowing you to understand the utilization of resources through the year.

   The **Monthly Resource Allocation per Category** graph **(Figure 16)** is shown on the **Executive Dashboard**. The following details are shown:

   - Monthly Resource Allocation per Category graph is a line graph and is displayed in the Marketing Budgets channel
   - By default the graph will be displayed in this channel and can be turned off based on the channel personalization
   - The monthly allocation graph will be displayed for the selected Plan in the channel personalization
   - The graph will show the sum of the allocations that are done at that level. For e.g.: At the plan level the graph will show the sum of all the allocations that are done for all the programs and all the activities under it
   - If the user drill downs to any specific program then the graph will show the sum of all the allocations that are done for that program and all the activities under it
   - Legend is displayed beside the graph and it displays the resource categories and the colors used to represent them on the graph.


Fiscal Year: 2011
Business Unit: Change Selection
Go
Fiscal Year: 2011
BU: Bose Marcomm
Data as of: 22 Dec 2011 12:10 AM
2011 Marketing Budgets
Dollars (Thousands)
$100
$80
$60
$40
$20
$0
Planned Amount
Current Forecast
Allocated To Spend
Spent
Current Forecast vs. YTD Spent
$0.10
$0.08
$0.06
$0.04
$0.02
$0
Q1
Q2
Q3
Q4
Current Forecast
YTD Spent
Monthly Resource Allocation per Category
Allocations (Hours)
10
8
6
4
2
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Project Manager
Creative Designer
Tester
Account Manager
Marketing Manager
Figure No.16

My Calendars

Overview

Marketing calendars are tools that help publish the marketing plans, programs, activities, events, offers, holidays etc. to all concerned in a graphical manner. These calendars can be viewed by the users who belong to the permitted groups for the respective channels. The calendars can be configured using the Dashboard admin tool, through the predefined channel configuration. The following calendars can be viewed:

- My Activity Calendar
- Events Calendar
- Holidays Calendar
- Offer Calendar

Getting Started

Click on the '**My Calendars**' link on the left pane. If the user logs into the system for the first time, the user can select the calendars to be displayed from a list of calendars that have been configured by the admin. The links to the calendars which are selected appear on the left pane.

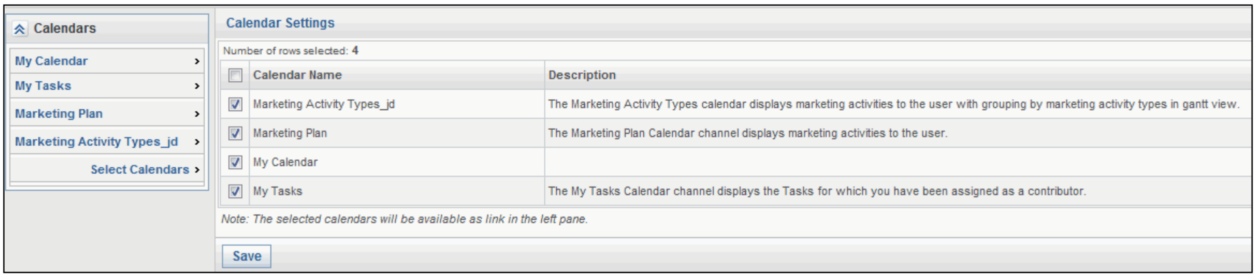


Figure No.1

Depending on the calendars selected by the user links will be displayed on the left pane **(Figure 1)**. By default the calendars configured by the administrator can be selected by the user to appear on the user's calendar dashboard.

For example:

Marketing Plan Calendar

The marketing calendar shows the marketing activities based on the In Market Start date and End date. The activities for which the logged in user has access can be viewed. If the logged in user has write access to the activity then on clicking on the activity bar on the calendar the activity details are displayed in an editable format and the user can edit the details or even delete the activity from the calendar itself. If the logged in user has only read access on the activity then by clicking on the activity bar the activity details are displayed in read only mode. The Complete Access groups for Plans get complete access on all Plans in the system and hence are allowed to access all Plans from the Calendars as well.

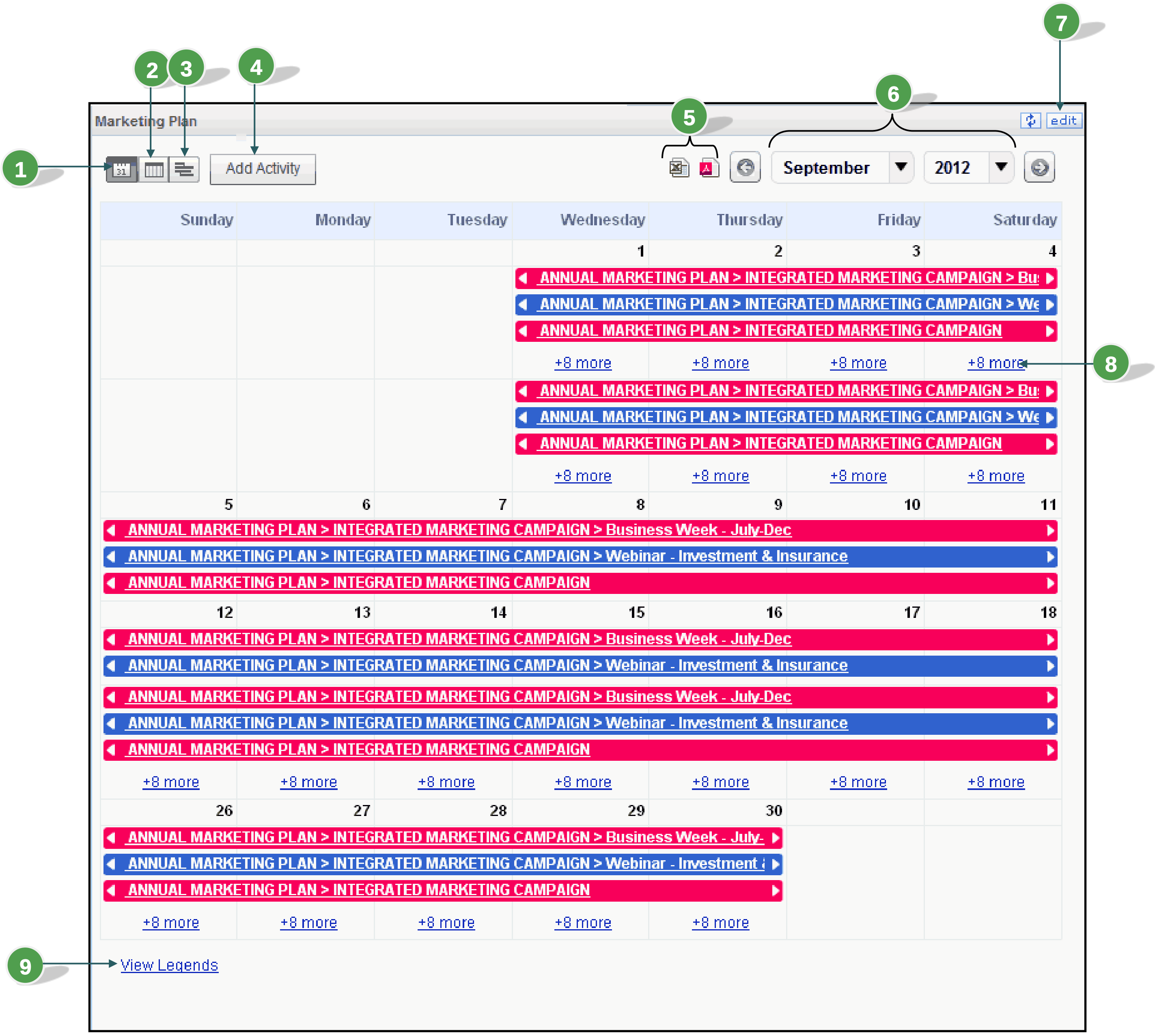


Figure No.2

The following actions can be performed on the Activities calendar **(Figure 2)**:

1 The calendar month view.

2 The weekly view.

3 The Gantt chart view – A hierarchical view is displayed of the Plan/Activities in the Gantt view.

4 More activities can be added to the calendar. Click on the button and the activity details popup is displayed **(Figure 4)** where the details can be entered and by clicking on the '**More Info**' button takes the user to view the activity details into Strategic Planner. Double click on a particular date to add more activities.

The Add Activity button on the Marketing Plan calendar (see top left of the screen shot above) is visible if the logged in user has access to at least one Plan in Strategic planner. If the user does not have access to any plans, the button is hidden for that user as no activities can be added.

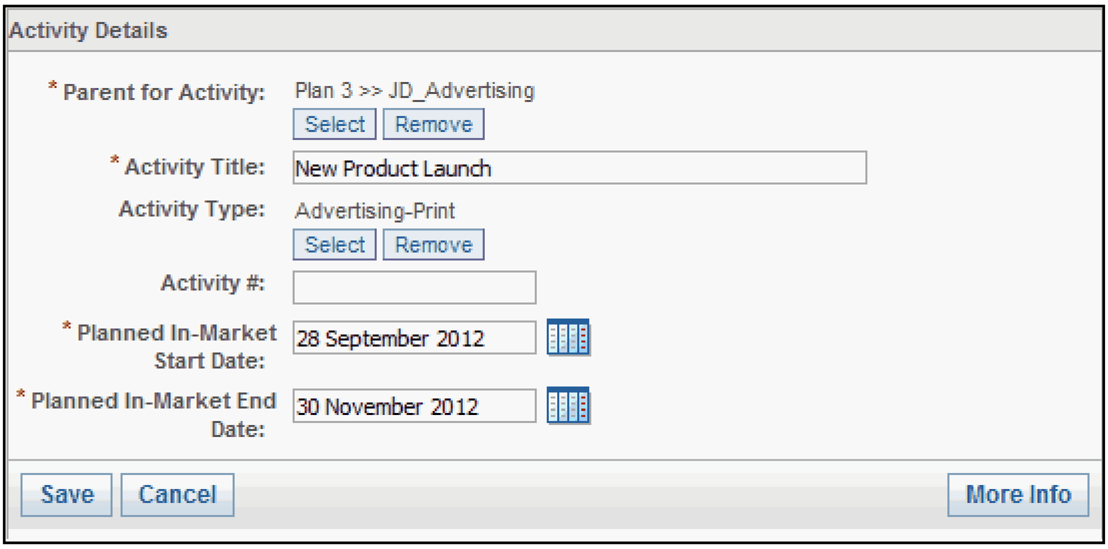


Figure No.3

5 The calendar can be exported to:

1. **Excel** – The range of months can be specified and it can be grouped by month.
2. **PDF** - The range of months can be specified, the legends can be included/excluded in the pdf, the orientation, range details, page size and page scaling can be specified. The positions/margins can be specified.

Note: While saving the exported files on your desktop, if you change the default filename make sure to give the extension of the file as .xls or .pdf depending on the file you are exporting.

6 Activities for different months or years can be viewed.

7 A channel personalization screen is displayed **(Figure 4)** where the user defined settings can be done. The

user can select the filters such as the business units, fiscal year, activity type and status.
The activity level to be displayed on the calendar can be selected.
Holidays also can be displayed on the calendar.
The display mode can be set such as to show start to end date bar, to show only start date, to show only end date or to show start and end date only.
The setting for showing all the items for a day instead of showing the ‘+ more’ link can be set.

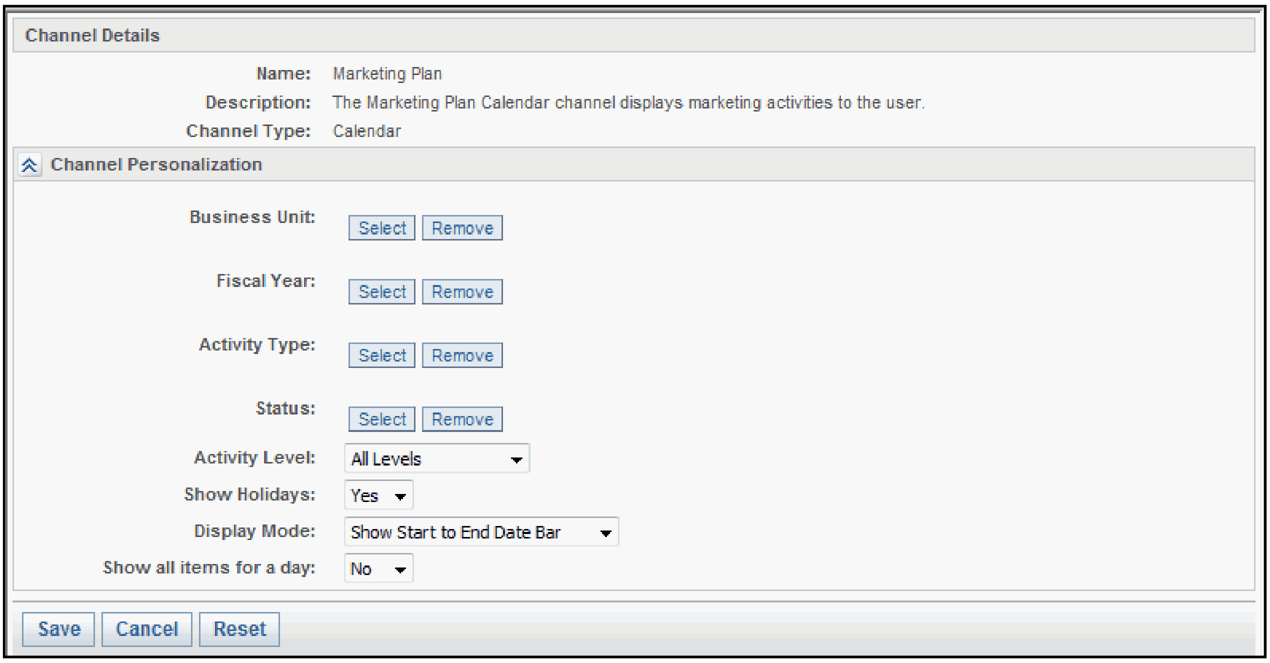


Figure No.4

8 The '+' sign is displayed if there are more activities for that particular date. By clicking on the link the list of activities for that particular date will be displayed.

9 The legend can be viewed. Different colors can be configured for different event types so that it is easy to differentiate the events.

Marketing Activity Type Calendar

A hierarchical view is displayed of the Plan/Activities in the Gantt view. You can view the Calendar (Gantt view) with a grouping of Activities of the same type. These will be shown on the same line in the Calendar based on the Start and End Date. If there is a time overlap for Activities, the Activity bar will be displayed on a new line. A sample is shown below. Activities belonging to an 'Activity Type' will be sorted on 'Start Dates' and Activity Types will be listed on the left hand side on the calendar **(Figure 5)**.

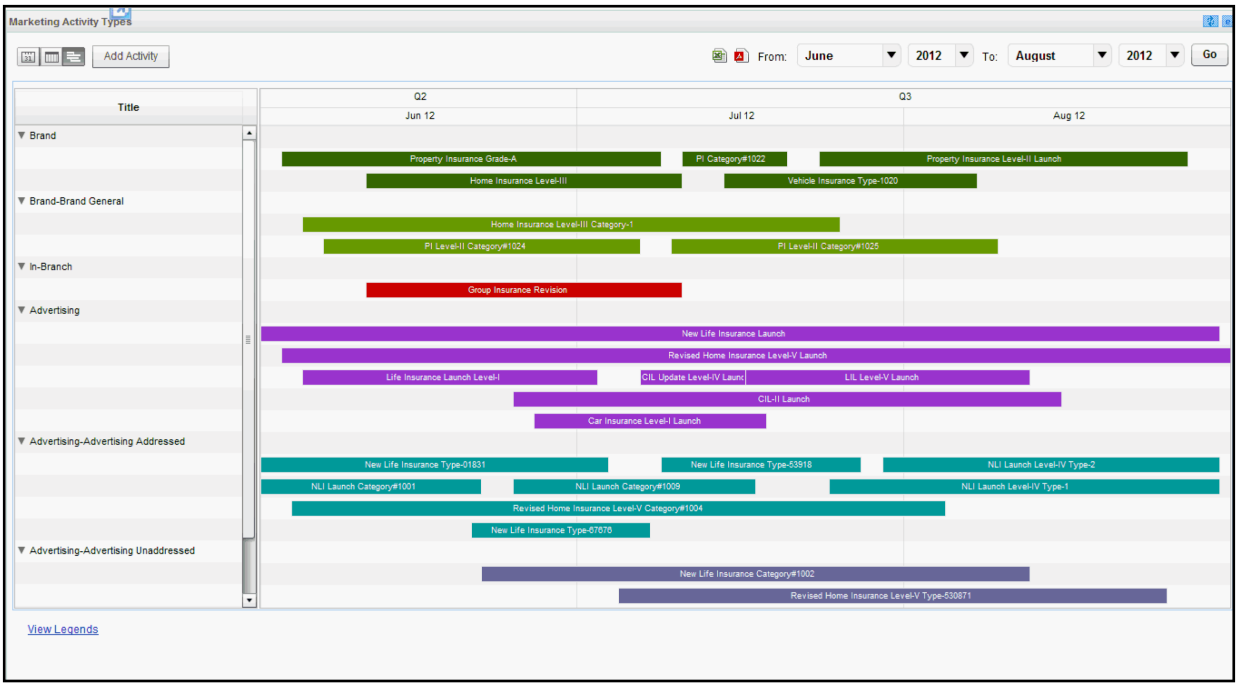


Figure No.5

Navigation and View

When the user clicks on the activity bar in a marketing plan calendar an activity details popup is displayed **(Figure 6)**. If the user navigates into the solution from the '**More Info**' button in the popup, the '**Back to Calendar**' link is displayed on the view activity screen, making the navigation from the details screen back to the Calendars easy. Clicking on this link takes the user back to the Calendar.

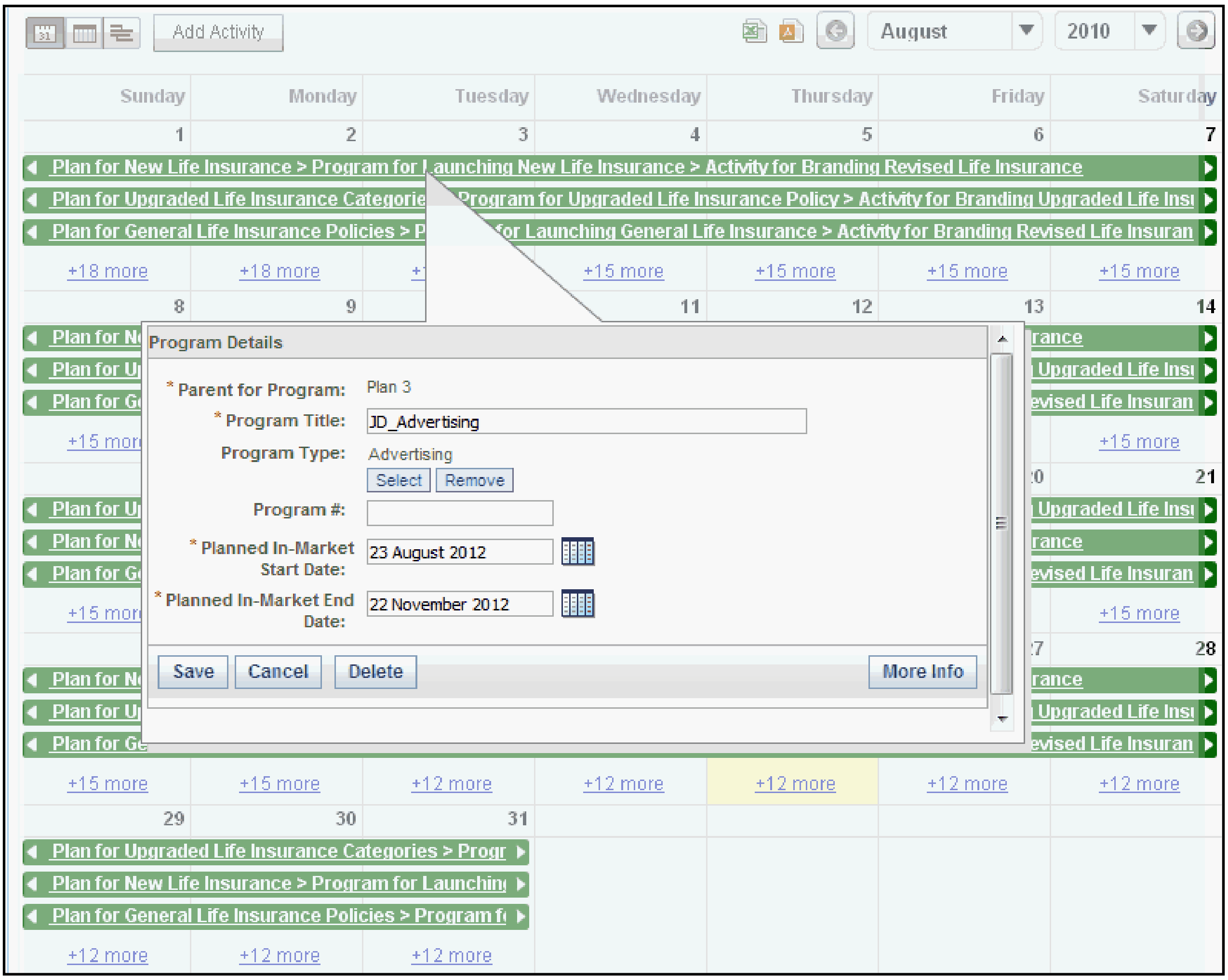


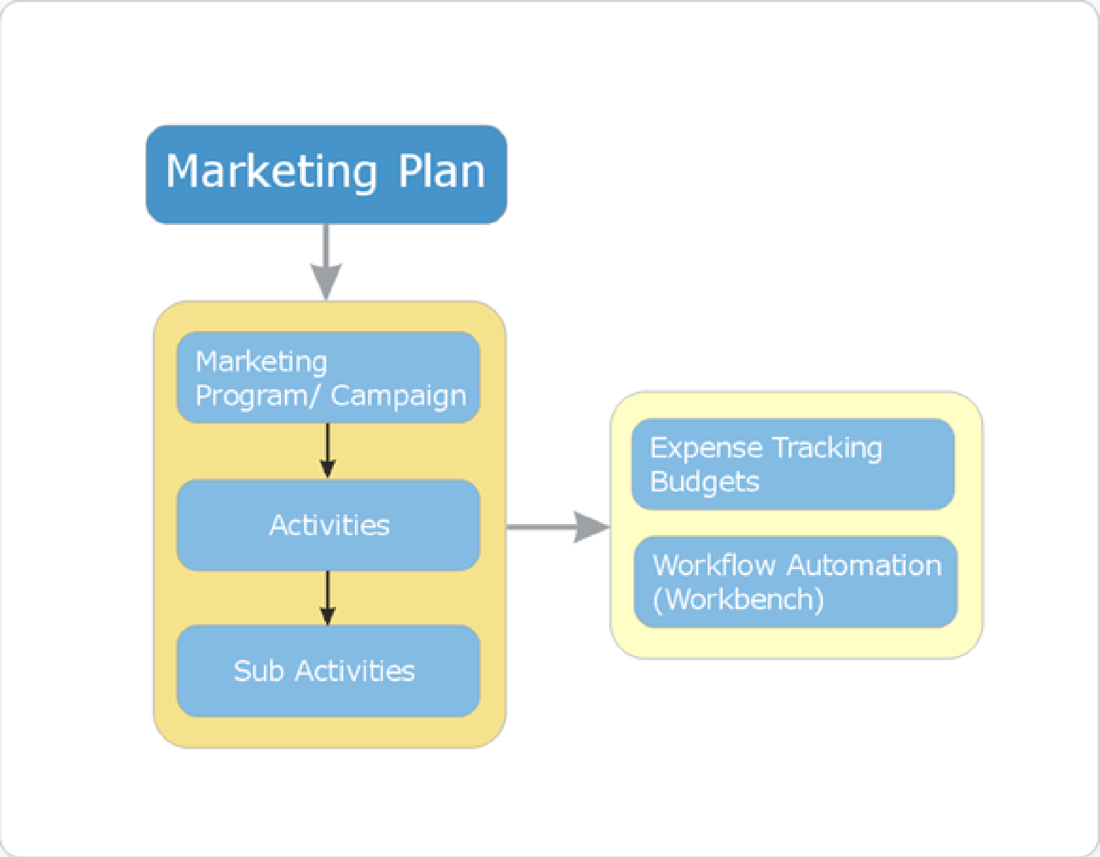
Figure No.6

The '**Back to Calendar**' link is available for the other calendars as well.

The Calendar also personalizes the state in which the user leaves it when last viewed. This means that the user can log out and log in again and the view will remain the same.

Strategic Planner

Overview



Using the Strategic Planner, the marketing team and managers can create Plans, Campaigns and associated Activities. They can define the Activity type, plan the amount for the activity, define objective and select target groups for that particular activity and select the product to which the Activity is applied.

Strategic Planner is also closely integrated with the Marketing Workbench and the Budget Manager, making it much easier for the organization to track the various aspects of a campaign, including workflow and finance. It enables the marketing managers and financial controllers to forecast spends on various marketing programs, manage commitments to vendors and track spending and invoices. It eliminates the need for marketing managers to manually track their budgets in spreadsheets.

Glossary of terms

- **Business Units -** An organization can have more than one business units corresponding to lines of business.
- **Marketing Plan -** A marketing plan is a unit that holds all the marketing programs and campaigns. Each of the business units can have one marketing plan per year.

- **Marketing Program/Campaign -** A marketing program/campaign is a marketing initiative for conducting marketing activities. Each marketing plan can have several programs/campaigns.
- **Activities -** An activity is a unit of work to be carried out for executing marketing program/campaign. Each program/campaign could have several activities associated with it.
- **Sub-Activities -** A sub-activity is a further classification of activities.
- **Vendors -** Vendors are the sellers/suppliers appointed to provide services for executing campaigns/activities/sub-activities.
- **Commitments -** Commitments are amounts committed to vendors for services rendered to the organization. Each campaign/activity/sub-activity could have several commitments against it.
- **Invoices -** Vendors raise invoices for services rendered to the organization. Each commitment could have several invoices raised against it. Each campaign/activity/sub-activity could have several invoices raised against it. Invoices may or may not be related to commitments.
- **Budgets -** Budgets are amounts allocated for expenditure on marketing activities for a specific period. Budget managers are assigned to manage the budgets.
- **Marketing Objectives -** Marketing objectives are specific, measurable outcomes or results that an organization plans to achieve in a given period.
- **Products -** Products are a bundle of need-satisfying tangible and intangible attributes offered to a buyer by a seller.
- **Segments/Target Groups -** Segments are a group or sector within a heterogeneous market consisting of consumers or organizations with relatively homogeneous needs and wants; those within a market who will respond to a given set of marketing stimuli in a particular way.
- **Activity Type/Sub Type -** Activity types and sub types are classifications of activities. For example: If we have an activity called advertising, we can have activity types – television advertising or radio advertising.
- **Forecasting -** Forecasting is predicting future variables, such as the amount of spends or level of sales in a given period, the environmental factors that will influence the firm's performance, etc.
- **Cost Centers -** Cost centers are units in the organization to which budget allocations are made. The money spent on different campaigns/activities is charged against these cost centers.
- **Cost Categories -** Cost categories are items of expenditure. For example: In an invoice there may be several items such as agency fees or service charges or tax. These items are classified into cost categories.
- **Financial Accounts -** Financial accounts are items of expenditure in the financial accounts of the organization. Therefore cost categories in the system can be linked to the financial accounts in the organization.
- **Activity Templates -** Activity templates are standard templates that can be created to define new campaigns/activities. These are created for the purpose of standardization.
- **Allocated to Spend -** Allocated to spend is the amount of money that is set aside to spend at the campaign/activity level from the total allocated amount for that level. allocated to spend amount may be calculated at all levels.
- **Unallocated -** Unallocated is the balance amount of money that is remaining after all allocations are made to campaigns/activities. Unallocated amount may be calculated at all levels.

- **Unspent -** Unspent is the balance amount of money that is remaining from the allocated to spend amount after all expenses are made at a certain level.
- **Reviews -** A review is a process conducted to invite comments from different key personnel in the organization on a certain issue. For example: Once a plan is created, review comments can be invited from certain persons based on which the plan can be modified.
- **Sandbox -** An area within a plan in which bulk changes can be applied to the plan and entire hierarchy below it. Changes are not affecting the actual information in the plan until they are in a consistent state and are saved. When all the information is in consistent state the budgeting information follows the budget constraints in strategic planner. These changes will be applied in a single step.

User Roles

- **Plan Owner**: The Head of Marketing, who owns the plan, reviews the planned marketing activities and tracks marketing effectiveness. Plan owner/creator has complete access(read/write/delete) on the plan and read access on all the levels below – unless s/he is added into any role that has complete access at lower levels.
- **Budget Managers**: Product managers who manage the funds released for campaigns. They have access to view the list of estimates/commitments/invoices in the expenses tab from the budget manager view. A budget manager having access at a higher level can view the details of the lower level also from the budget manager view..
- **Authors**: The users who have access to edit the plan and create programs, campaigns and activities. They can either have complete access or partial access based on a configuration setting. They have read access on all the levels below – unless s/he is added into any role that has complete access at lower levels.
- **Marketing Coordinator:** The marketing coordinator is responsible for the marketing activity(program/campaign/activity) and its execution. S/he has complete access (read/write/delete) on the marketing activity and read access on all the levels below – unless s/he is added into any role that has complete access at lower levels.
- **Readers**: Stakeholders of the plan who get access to view the plan. Readers are also present on the activities. A reader at a higher level as read access to all the lower levels – unless she/he is added into any role that has complete access at lower levels.
- **Reviewers**: Stakeholders who review the plan and give their comments. Reviewers are also present at the activity level. Reviewers can see all the data in read only and give the comments on them.
- **Budget Delegate**: The person who works on the sandbox with the marketing head. The budget delegate has access to the sandbox only and may not have access to the plan. The budget delegate can reallocate the money in a plan and can align activities to the next fiscal year.
- **Estimate Coordinator** - The Estimate Creator or the Estimate Coordinator can add or delete users who are Estimate Coordinators. The Estimate Coordinator has equal rights as the Estimate Creator who can edit, change, approve the estimate etc.

Getting Started

After signing in, the user can click on ‘**Strategic Planner**’ link provided on the dashboard screen on the left menu (MOM) to launch strategic planner solution. The application launches with the following screen layout **(Figure 1)**.

Figure No.1

Left navigation bar - It has applications related to strategic planner. The links are:

- **Strategic Planne**r – Contains links to plans, budgets, reviews and bulk changes.
- **Plans** – Contain links to view plans, view activities, view estimates, view commitments and view invoices.

Content Frame – The default page displays a list of existing plans under the plans section. The user can search for a particular plan by giving the filters and clicking on the search button **(Figure 1).**

Navigation Tips: Each screen, which describes details of the plan/program/campaigns/ activities in the strategic planner solution, has breadcrumbs on the header of the content page. These breadcrumbs displayed describe the hierarchical path of the planner component in context. Each node in the breadcrumb has a URL to navigate to the particular component.

Organizing and Setting up Plans

When user launches strategic planner solution, ‘**View Plans**’ screen is shown by default. The user is shown the list of plans where user plays a role of a plan owner, reader or an author. By default, the screen lists all the plans accessible to the user; the user can also search for plans by providing search criteria on this screen. Plans fulfilling the criteria are then listed on the plan list.

The screen has two parts **(Figure 1 - Content Frame)**

Search: Here the user can search for the plans by selecting details such as business unit, fiscal year and status and giving the plan title. Then click on the ‘**Search**’ button to view the Plan(s).

Plans: Here the searched plan(s) will be displayed with details such as title, business unit, status, fiscal year and planned amount (expenditure). The following operations can be performed on this screen:

- **Delete** – The selected plan can be deleted.
- **Copy** – The selected plan can be copied.
- **New** – A new plan can be created.

Making a Copy of an existing Plan

Select the plan(s) to be copied and click on the ‘**Copy**’ button **(Figure 1)**. A copy plans screen is displayed **(Figure 2)**. The following details can be edited/changed:

- **Title**: The plan name can be changed.
- **Business Unit**: Can be selected from the drop down list.
- **Fiscal Year**: If the fiscal year setting is set to true by the admin then this can be changed. If the fiscal year setting is set to false then the 'Advance dates by year' option is given to the user.
- **Currency**: Can be selected from the drop down list.
- **Copy Options**: The options such as whether all the levels, only the programs, only the activities or only the sub activities need to be copied can be specified.

Figure No.2

- : For more options click on the icon. A select more options popup is displayed **(Figure 3)** from where the plans/programs/activities/sub activities to be copied while making a copy of the plan can be selected.

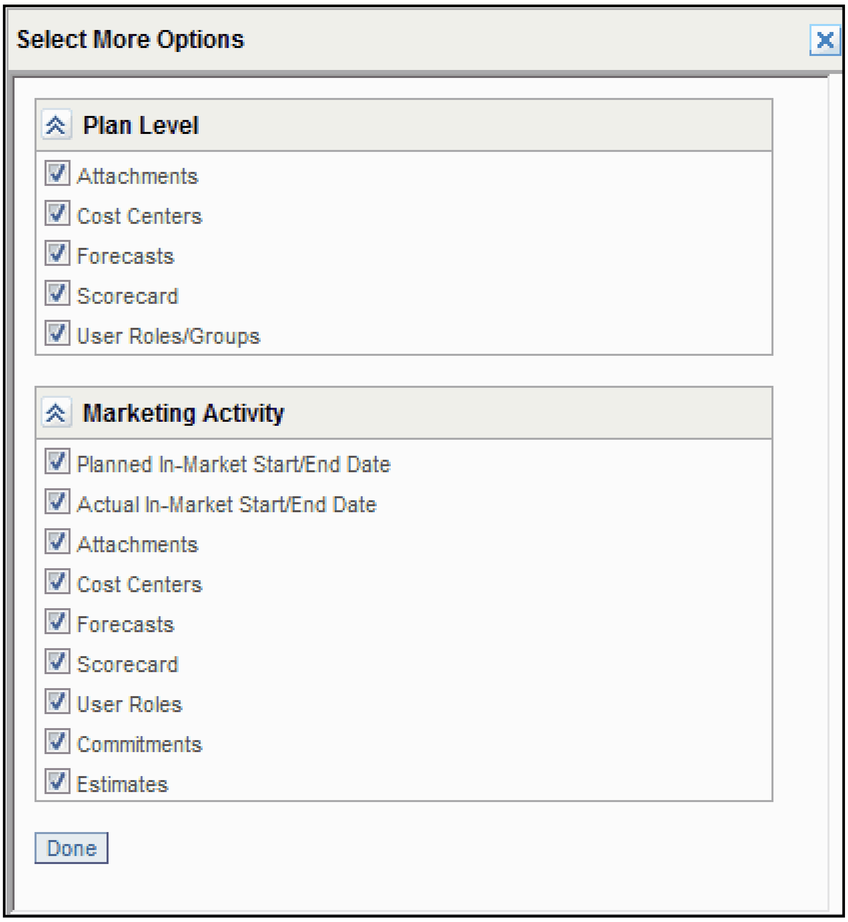


Figure No.3

While making a copy of a plan the following details get copied:

Plan Level:	
Field	**Explanation**
Objectives	Objectives selected for the plan

Attachments	Attachments of the plan e.g. reference documents
Cost Centers (Budget Allocation)	If the setting for 'Business Unit specific cost centers' is set to true and the Business Unit is changed, then the cost centers will only be copied if they are present in the selected Business Unit else nothing will be copied.
Forecast	Forecasts are copied only if the Cost centers are copied.
Scorecard – Measurements and KPI's	Only the expected values will get copied and not the actual ones. The dates that get copied will be advanced by a year of the original plans.
User Roles / Groups	All user roles including Plan Universe will get copied. If the Business Unit is changed then the default authors and readers of the new Business Unit would be copied
Additional Facets	Any additional facets associated with the plan
Activity Level:	
Field	**Explanation**
Activity Type	The channel for which the activity is created.
Planned In-Market Start/End Date	The dates will be advanced by a year of the original activity.
Actual In-Market Start/End Date	The dates will be advanced by a year of the original activity.
Activity Number	The number will be auto generated
Currency	The currency selected at the plan level will be copied.
Products	Products selected for the marketing activity
Target Segments	Target Segments selected for the marketing activity
Distribution Channels	Distribution channels selected for the marketing activity
Objectives	Objectives selected for the marketing activity
Attachments	Attachments of the marketing activity e.g. reference documents
Cost Centers	Cost centers selected for the marketing activity
Forecasts	Forecasts are copied only if the Cost centers are copied.
Scorecard – Measurements and Kpi's	Only the expected values will get copied and not the actual ones. The dates that get copied will be advanced by a year of the original plans.

Creating New Plans

To create a new marketing plan click on the '**New**' button, on the view plans screen **(Figure 1)**. This displays a create plan screen **(Figure 4)** where details such as plan title and description can be entered. Business unit, currency, fiscal year and plan status can be selected. Relevant documents can be uploaded and added by clicking on the '**Add**' button in the attachments section.

To save the newly created plan click on the '**Save**' Button or to cancel the operation click on the '**Cancel**' button.

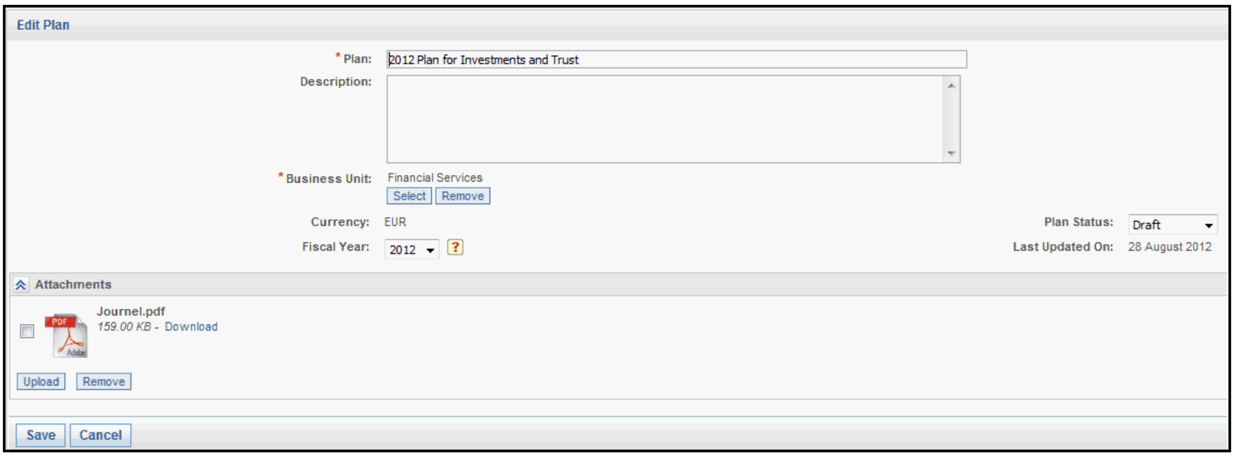


Figure No.4

Once the newly created plan is saved the user is taken to a view plans screen which displays plan details in a tabbed view as described below.

Viewing existing Plans

The view plan screen with the following tabs:

- **Info**: Here the information such as plan title, description, business unit, currency, fiscal year, plan status and last updated on are displayed. These details can be edited by clicking on the '**Edit**' button and clicking on the '**Save Version**' button the user can save the version of the plan. The plan creator is able to create plan versions from the plan info tab. When a version is created, only information relevant to the plan is maintained. The hierarchy of programs and campaigns are not maintained as part of the version information.

  The plan creator is allowed to create a version for the plan. Authors are not allowed to save versions. There is a setting for giving authors edit access to the plan. This setting will determine if authors can edit the plan and create a version.

  The user can also specify the plan objectives by selecting from predefined objective list, which is displayed when user clicks on the '**Add**' button in the objective section. The user is restricted to select only from the objectives selected at the plan level for the lower levels. To delete the selected objectives click on the '**Delete**' button. If the objectives are deleted at this level the objectives are automatically deleted at all the lower levels.

  List of attachments for the plan is also list in attachments section with provision to delete a selected attachment or add more attachments by clicking on the '**Delete**' button or by clicking on the '**Add**' button respectively **(Figure 5)**.

  A '**View Audit History**' link is displayed which when clicked displays the details of the changes made in the plan information.

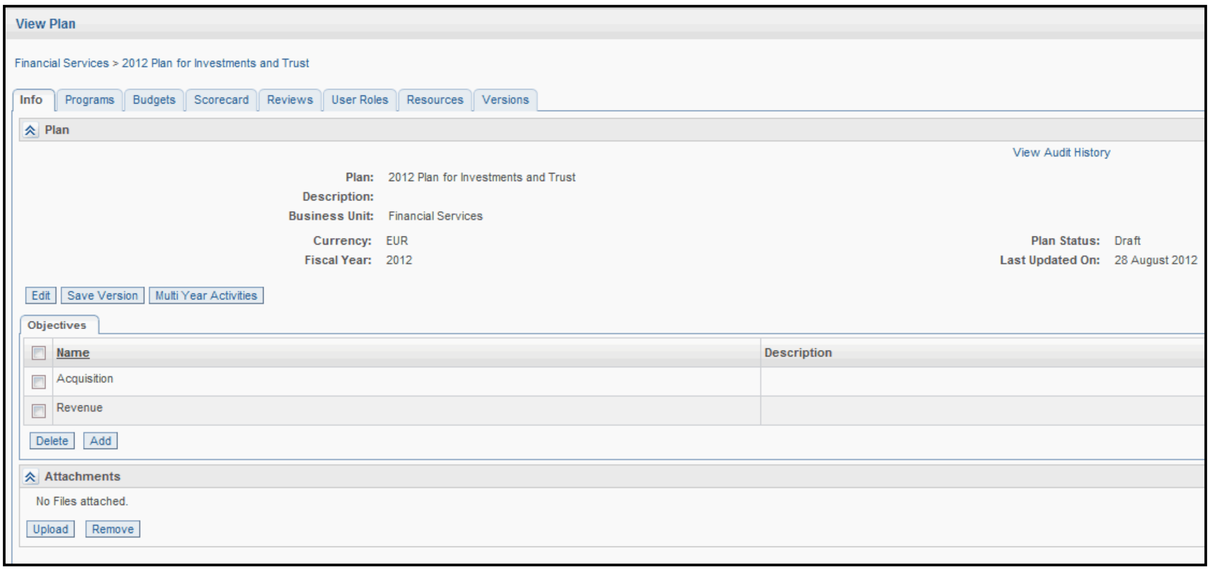


Figure No.5

- **Programs**: Here the user can search for existing programs under this plan by giving details like status, planned start date (from and to) and the program title and then clicking on the '**Search**' button. The searched programs are displayed with details such as program title, program# (number), status, planned start and end date and the planned amount. By default all the programs are listed here.
  New programs can be added by clicking on the '**Add**' button and the selected existing programs can be deleted by clicking on the '**Delete**' button **(Figure 6)**. The activities under this program can be viewed by clicking on the program title link.

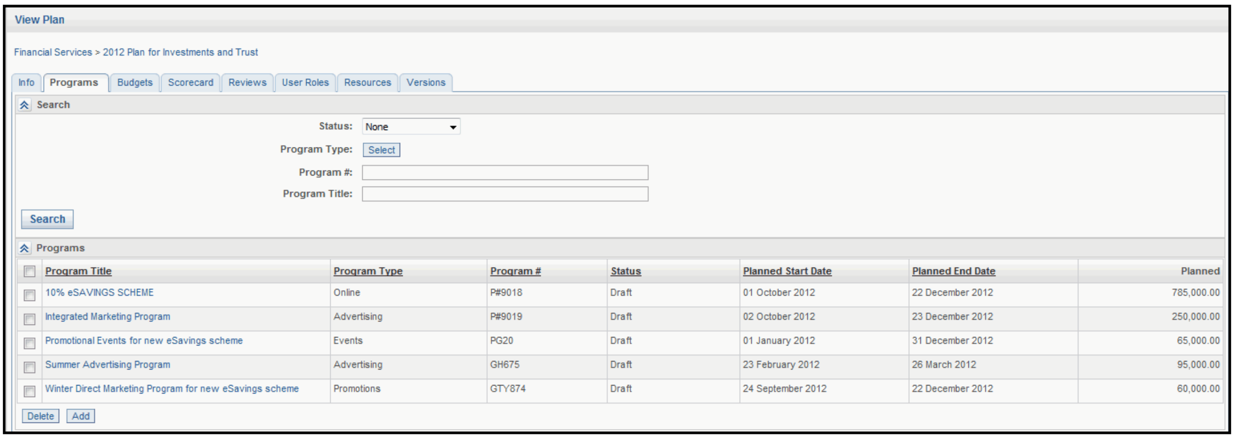


Figure No.6

- **Budgets**: Here the financial information such as the currency (the currency of the cost center is displayed) finance planned, allocated, committed, spent and unallocated amounts are displayed. The cost center information such as the name, planned amount and the unallocated amount are also displayed. New cost centers can be added by clicking on the '**Add/Edit**' button and selecting it and clicking on the '**Delete**' button can delete existing cost centers. The forecast information on the planned expenditure is displayed. The forecast can be edited by clicking on the '**Edit Forecast**' button **(Figure 7)**.

To go into the sandbox or bulk changes mode to do the budget reallocation click on the 'Edit Bottom Up' button.

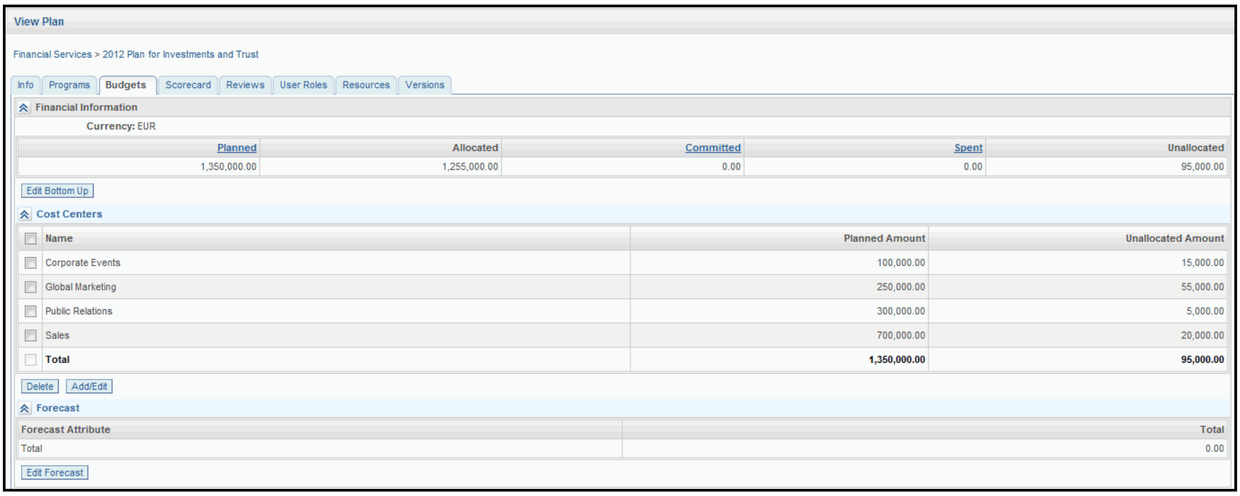


Figure No.7

- **Scorecard**: This section gives the information such as measurements and KPI lists. The measurements have the expected and actual values, start and end dates for the program and the frequency. New measurements can be added by clicking on the '**Add**' button and selected measurements can be deleted by clicking on the '**Delete**' button. All the measurements with the frequency as one time and having only one Actual value slot can be edited by clicking on the '**Edit**' button. The measurements with the frequency more than one time have to be edited individually by clicking on the measurement name link. The KPI list is displayed with the key performance indicator, expected and the actual values and can be recalculated by clicking on the '**Recalculate**' button **(Figure 8)**. If any changes are made to the measurements (add/edit/delete), on the view plan/program/activity screen on the scorecard tab, the system will automatically recalculate KPI's and give an explicit message to the user.

Note: Click on the Recalculate button for the system to recalculate any KPI's that are based on budgetary values.

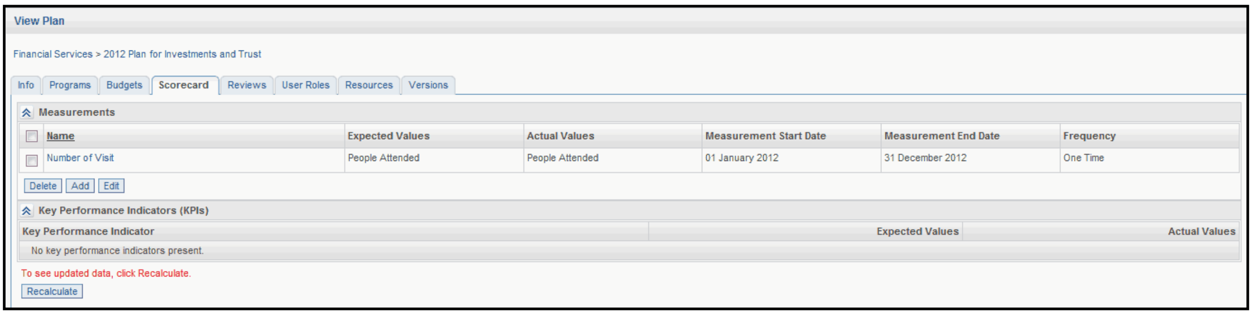


Figure No.8

- **Reviews**: This section displays the title and status and allows the user to view the reviews for the program/campaign selected. Here the user can delete a selected review by clicking on the '**Delete**' button or the user can initiate a review by clicking on the '**Initiate Review**' button, which displays a new screen to create a review and invite user/groups for the review.
- **User Roles**: This section displays the details such as created by and last updated by. The authors/budget managers/readers are displayed here. New authors/budget managers/readers can be added **(Figure 9)**.

If the plan universe setting is set to true by the admin then the user can select the groups and the users in the plan universe. The authors and the readers can be selected from the plan universe. A groups of users as authors and readers can be added. While adding a user in the author/ budget managers/reader role at the plan level, if the hierarchy of programs/campaigns/activities already exists under the plan then during the add author/reader interaction the system gives 3 options:

- To add the user as author/reader only at the plan level.
- To add the user as author/reader at the plan level and as coordinator at all the lower levels.
- To add the user as author/reader at the plan level and as a coordinator in the selected levels under the plan.

Selected authors/readers can be deleted by clicking on the '**Delete**' button. When a user is deleted from a user role at a particular level in the plan options are given to either delete the user from the user role at the current level only or from all the levels below also. Depending on the option selected by the user the operation will be performed. This display of options is based on a setting in the planner settings.

A budget manager can be added at the plan level. If the setting for the user role propagation is set to true then during program/ campaign/ activity creation under the plan the user is propagated from the parent level.

The access level of each user can be viewed by selecting the user and clicking on the '**View Access**' button.

In case the Plan Universe Access is set to 'True' then the Plan Universe users can be added as authors/readers in one simple easy interaction.

When a plan is created and a business unit is selected, the users selected as default Authors and Readers in the planner admin while creating the business unit are automatically populated as Authors and readers respectively. These groups and users are also added to the Plan Universe Groups and Users, if the Plan Universe setting is true. The default Groups and Users as Authors and Readers are grouped together for display in the Authors and Readers List. This helps to distinguish them from the Authors and Readers added for the Plan.

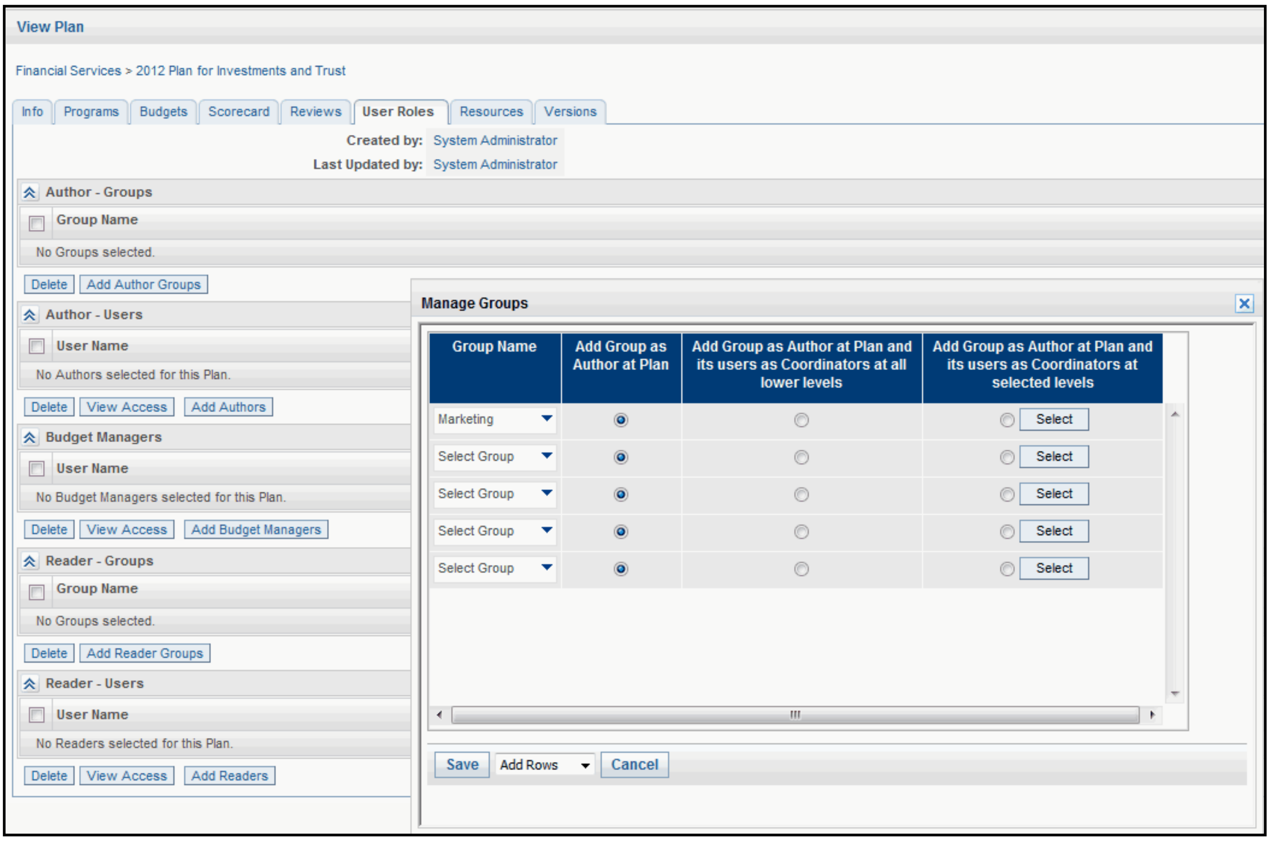


Figure No.9

- **Resources**: The allocated resources for the plan will be displayed in this tab in the form of a calendar. The resources can be requested and allocated using the 'Resource Planner' module. A Resource Forecast can be configured to be included as a part of the Strategic Planning process. The Forecast per Category of resources can be entered for each Activity in the Plan. These can be entered per Forecast Duration as defined in the system. For example, a monthly requirement of Designers for a particular Activity can be entered.
- **Version**: This section displays the version list with details such as created date, creator and comments. Existing versions can be selected and deleted by clicking on the '**Delete**' button **(Figure 10)**.

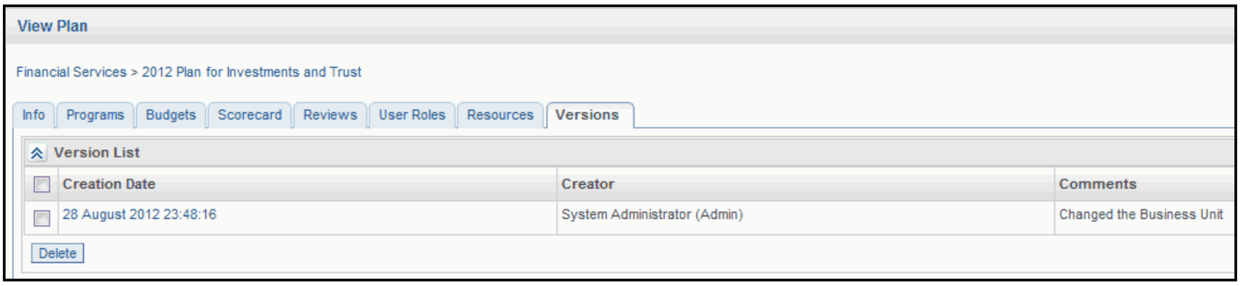


Figure No.10

Note: After the Plan has been created with all the details such as Programs, budgets, scorecards, user roles and resources it can be viewed in another currency if required. The currency selected during the creation of the plan will remain the standard currency throughout the plan. If a user needs to view the plan in another currency, it can be done clicking on the 'Select Currency' on the left pane. The plan will appear in a read-only mode in the currency selected. The system will take care of the exchange rates depending on the rates entered in the system.

Clone and Replace Users

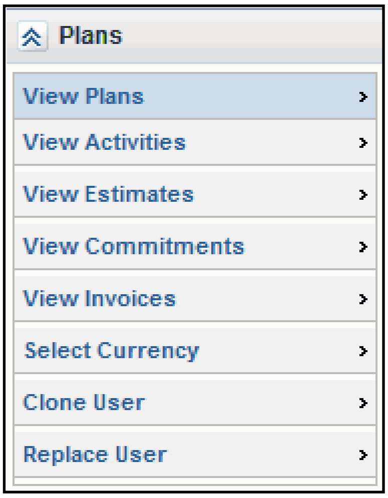


Figure No.11

- **Clone User** – In case another user needs to be added in a particular user role in a plan and the new user needs to get the same rights as an existing user in the user role then the '**Clone User**' feature can be used. The cloned user will have the same access permissions to a plan and all the programs/ campaigns/ activities under it as that of the selected a user.

  Cloning of a user cannot be done for the 'Marketing Owners' role as it is a role associated with a single user. For the 'Budget Managers' role cloning will be based on the setting whether it is a single user selection or group of budget managers. Cloning of a user is possible for author, reader, and activity coordinator user roles.

  Click on the '**Clone User**' link **(Figure 11)**, a clone user screen **(Figure 12)** where the plan title, description, business unit and the status of the plan is displayed in a read-only form. A new user can be selected from a list of users. If the plan universe is set to 'True' then the user list which is displayed will contain the users from the plan universe or else the user list will contain all the users from the system. The new user (Give the user) will get the same access rights as the selected user (the same access as). Save the cloning by clicking on the '**Save**' button.

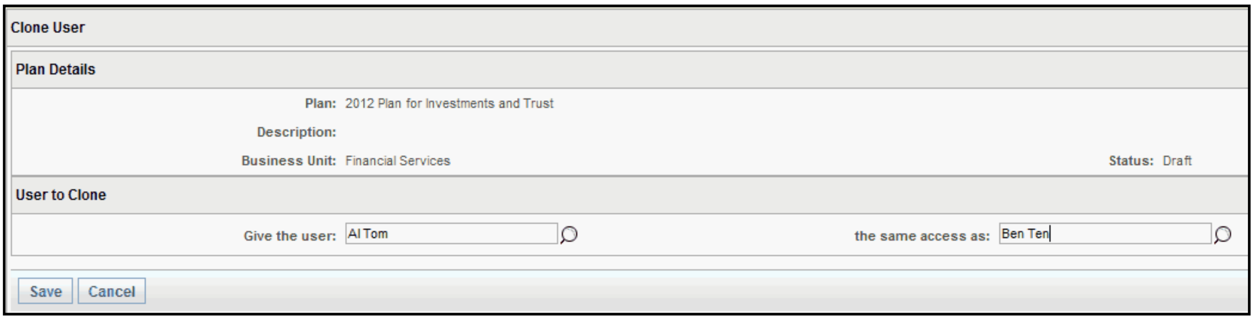


Figure No.12

- **Replace User** – In case a user with a specific user role in the plan and all the programs/ campaigns/ activities has left the organization or is on leave and has to be replaced with another user with the same access rights then the ‘Replace User’ feature can be used.
  Click on the ‘Replace User’ link **(Figure 11)**, a replace user screen **(Figure 13)** where the plan title, description, business and the status of the plan is displayed in a read-only form. The user to be replaced and the with which user can be selected. If the plan universe is set to ‘True’ then the user list which is displayed will contain the users from the plan universe or else the user list will contain all the users from the system. The access rights of the user to be replaced (Replace the user) will be transferred to the replaced user (with). Save the replacement by clicking on the ‘**Save**’ button.

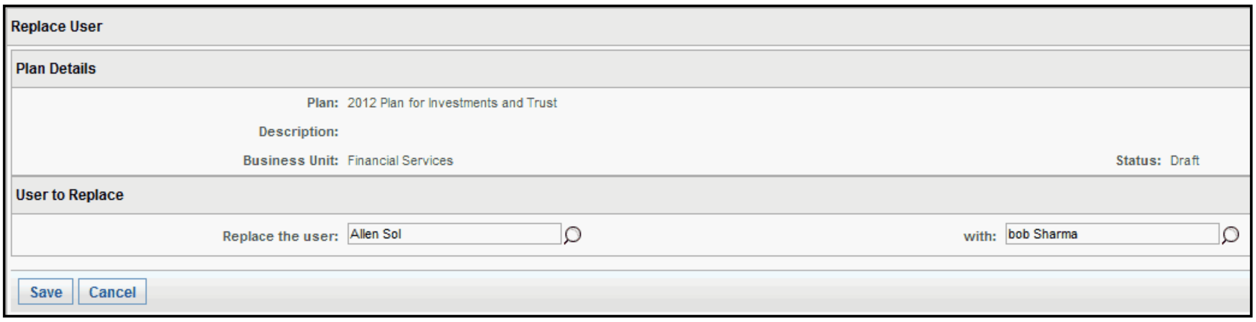


Figure No.13

Managing Programs/Campaigns/Activities

For a given plan, list of programs can be found under ‘**Programs**’ tab on the view plan screen. Alternately to view existing activities across all the plans click on the ‘**View Activities**’ link on the left menu under ‘Plans’. The screen is divided into two parts **(Figure 14)**:

Search: Here the user can search for the activities by giving details such as business unit, fiscal year, status, program/acivity type, program/activity # (can be given in multiples separated by comma. A contains search is done for each of the number given) and program/activity campaign title and then clicking on the ‘**Search**’ button.

Programs/Campaigns: Here the searched programs/campaigns will be displayed with details such as title, program/campaign type, program/campaign #(number), program/campaign status, planned start date, planned end date, planned (expenditure). The selected program/campaign can be deleted by clicking on the ‘**Delete**’ button.

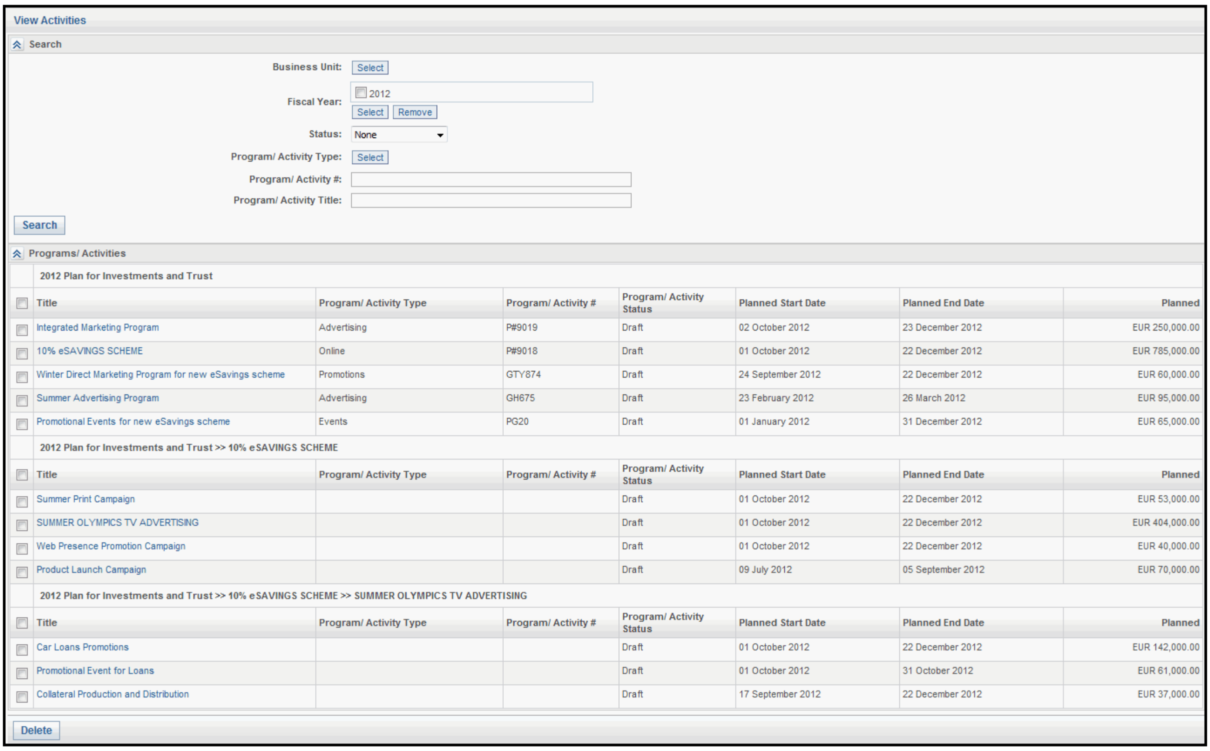


Figure No.14

Each programs/campaigns/activities title has a link. When clicked it traverses to view program/campaign screen that gives detailed information about the programs/campaigns/activities, described later in the document.

Adding New Programs/Campaigns/Activities

To add new program/campaign/activity traverse into a Plan/Program and select '**Programs**' / '**Activities**' tab on view plan/program screen **(Figure 6)**. List of programs are displayed for the plan with details such as program title, program/campaign/activity type, program/campaign/activity # (number), status, planned start date, planned end date and planned (expenditure). The selected program/campaign can be deleted by clicking on the '**Delete**' button.

Note: When creating a program/campaign/activity, there is a step where the user must select a template, if there is only one 'Blank' template then the template section is not displayed. If more templates are configured, then this section is displayed to the user.

To add a new program click on the '**Add**' button, a create program screen is displayed (after template selection, if templates are present) where the user can provide information such as program title, description, program type, program status, planned in-market start and end date and actual in market start and end date can be entered. The program# (number is auto generated or it can be entered by the user depending on the configuration done by the administrator) and the currency used for this program is displayed. The marketing owner can be selected by typing the first letter of the user name and selecting from the displayed list. If the setting for propagation of the marketing owner is set to 'True', then the user selected as the marketing owner at the program/campaign level is propagated to the campaign/activity created under it. Attachments can be added or selected from the digital library under the attachment section **(Figure 15)**.

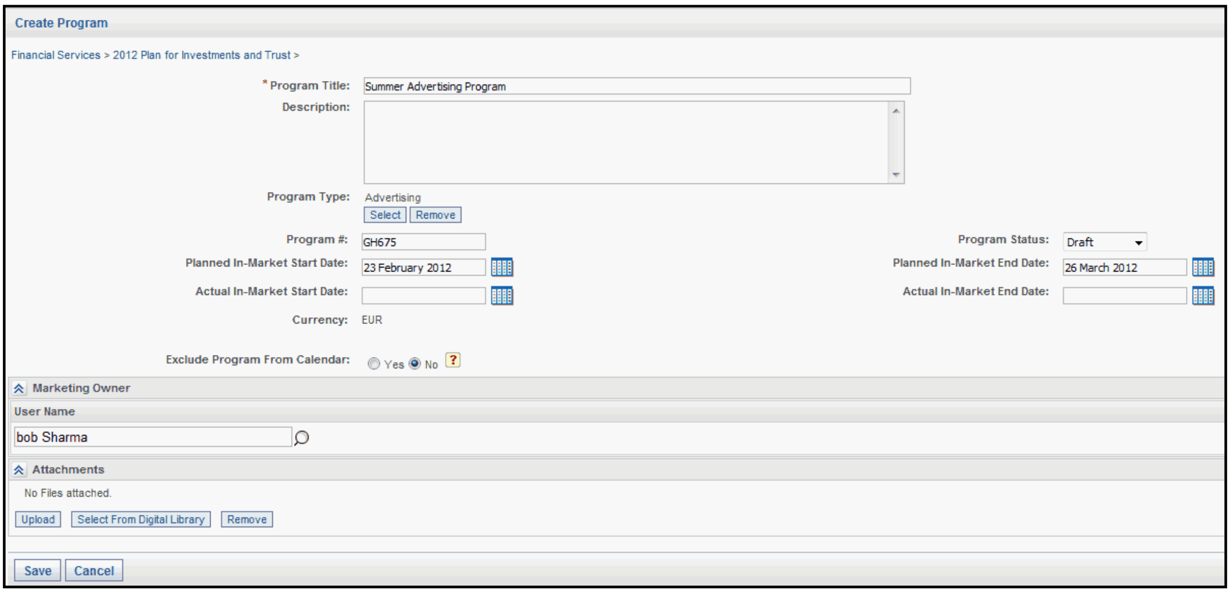


Figure No.15

For saving the program click on the '**Save**' button or to cancel the operation click on the '**Cancel**' button. Clicking on save button will create the new program/campaign and will display a view program screen which displays the program information.

View Program information

The view program screen has a tabbed layout with information for the program grouped under various tabs as described below:

Info Tab

Here the information such as program title, description, program#(number), program status, planned in-market start and end date, actual in-market start and end date, currency and last updated on are displayed. These details can be edited by clicking on the '**Edit**' button.

The users are able to create versions of programs by clicking on the '**Save Version**' button. This is applicable for all level of campaigns – programs, campaigns, and activities etc. The versions tab lists all the versions created for the activity.

The activity creator and marketing owner have access to create versions.

Other information related to affected objectives, products, target groups and distribution channels are grouped under tabs with similar name. Each of this information can be viewed and updated by traversing to the relevant tab.

Attachments if any can be added or deleted in the attachments section **(Figure 16)**.

A '**View Audit History**' link is displayed which when clicked displays the details of the changes made in the program information.

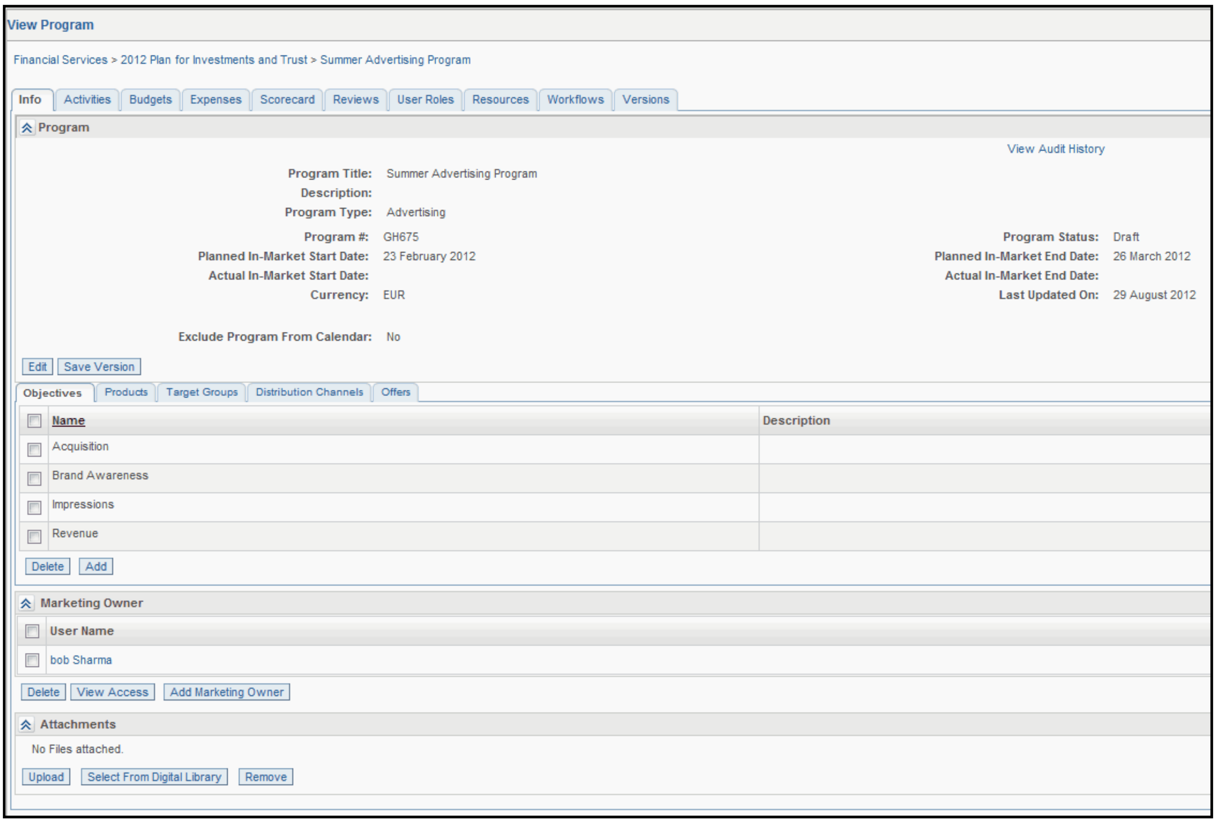


Figure No.16

Activities/Campaigns Tab

Existing campaigns/activities can be searched under this program by giving details such as status, campaign/activity type, planned start date (from and to) and the title and then clicking on the '**Search**' button. The searched campaigns/activities are displayed with details such as title, type, #(number), status, planned start and end date and the planned amount. New Campaigns/activities can be added by clicking on the '**Add**' button and the selected existing Campaigns/Activities can be deleted by clicking on the '**Delete**' button **(Figure 17)**. The activity can be moved to another Program by selecting the Activity and clicking on the 'Move' button.

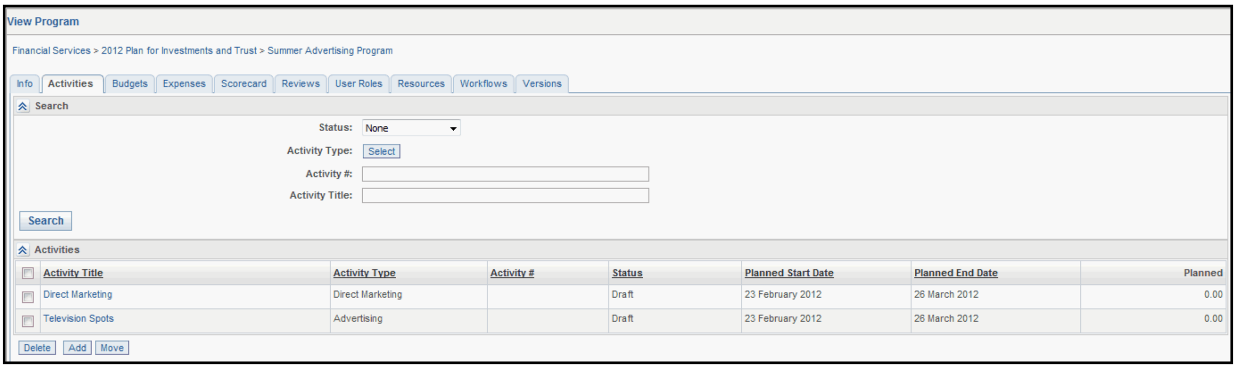


Figure No.17

Budgets Tab

The following information is displayed here **(Figure 18)**:

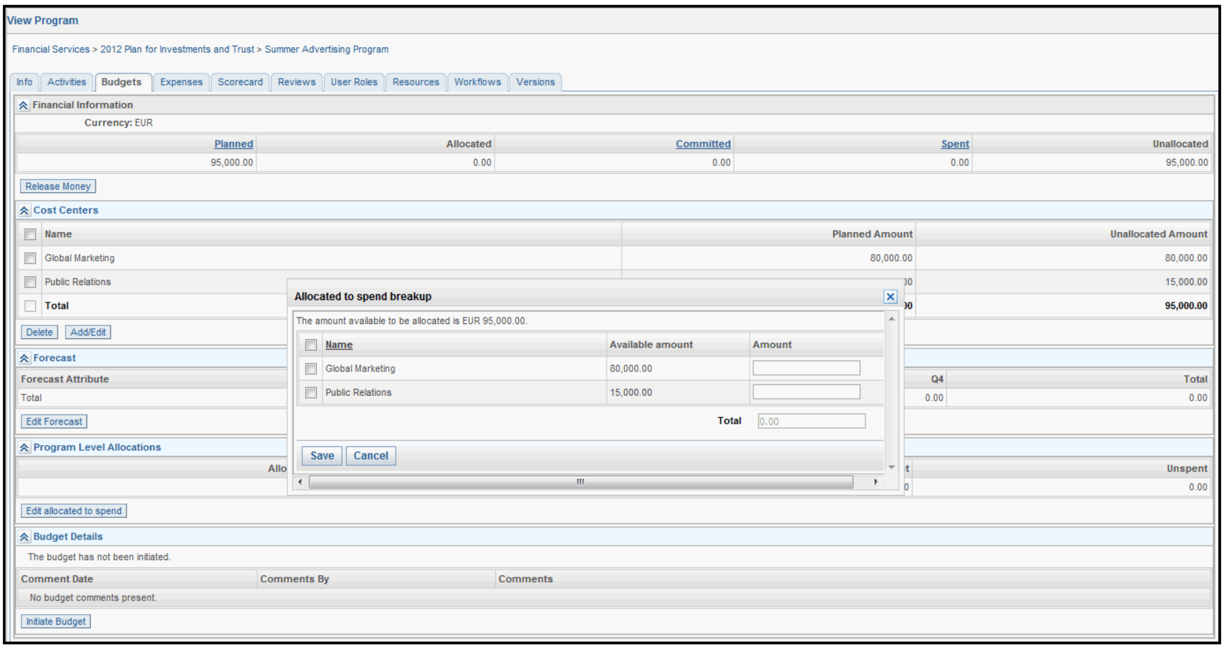


Figure No.18

- **Financial Information** - Information such as the finance planned, allocated, committed, spent and unallocated amounts are displayed **(Figure 18)**. A budget manager can be added if the setting for user role propagation is set to true then during program/ campaign/ activity creation under the plan the user is propagated from the parent level plan, program/ campaign in the program/ campaign/ activity being created. Money can be released by clicking on the '**Release Money**' button. The unallocated/unspent amount of this program will be released to the plan. The money can be released completely or partially to any level of the program **(Figure 19)**.

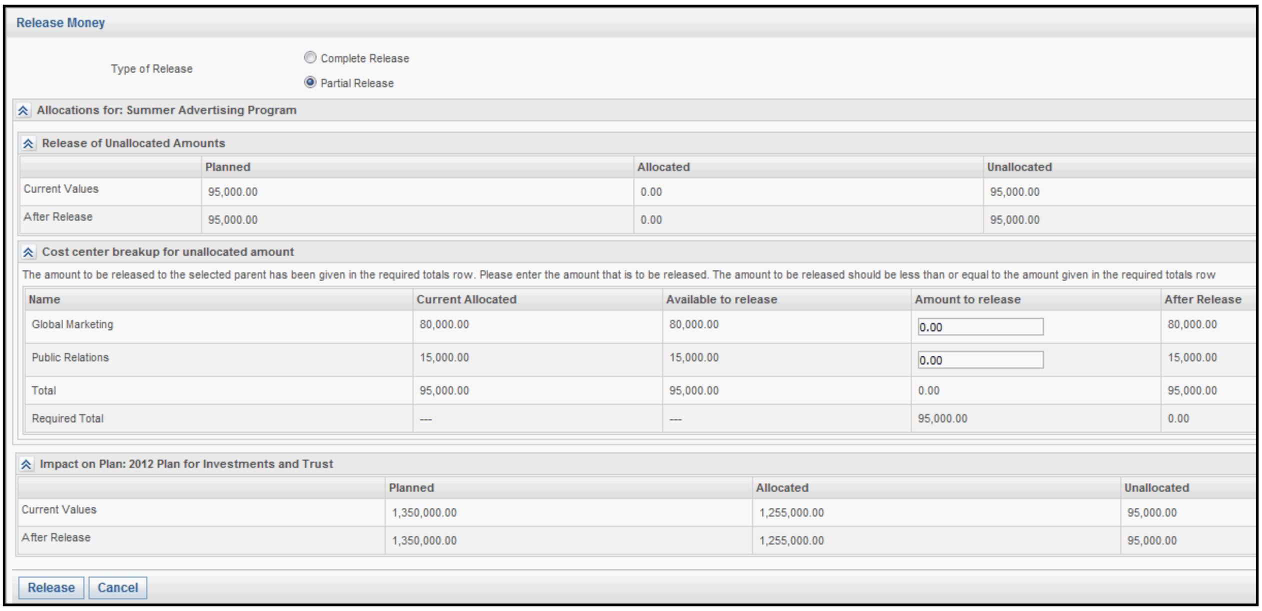


Figure No.19

- **Cost Centers** - Information such as the name, planned amount and the unallocated amount are displayed. Click on the '**Add**' button to select the new cost centers and add the planned amount to the selected cost center. To delete any cost center select it and click on the '**Delete**' button.
- **Forecast** – If the forecast feature is set to 'Yes' by the admin, it will be available for the end-user. The forecast duration can be set to Monthly – calendar months, Quarterly- quarters starting with the fiscal month and Annual- fiscal year. Flexible forecast durations per fiscal year as per your business needs can also be set. Information on the planned expenditure for the fiscal year is displayed. The forecast can be edited by clicking on the '**Edit Forecast**' button.

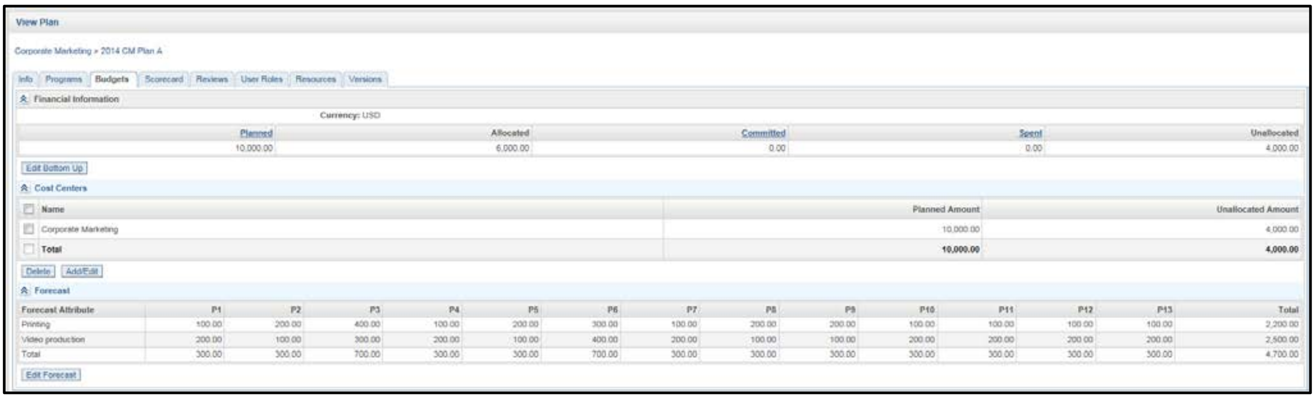


Figure No.20

- **Program Level Allocations** - Activity level allocations are displayed here with details like allocated to spend, committed, spent and the unspent amounts. Click on the '**Edit Allocated to Spend**' button to edit the allocated amounts cost center wise.
- **Budget Details** – To initiate the Budget first select the Budget Manager by going to the '**User Roles**' tab (if not already present) and then click on the '**Initiate Budget**' button. Once the budget is initiated then the budget detail such as the budget initiated on and by is displayed here. The Budget Manager's comment date, name and the comments are displayed here. The budgeting process can be initiated by clicking on the '**Initiate Budget**' button, which can be initiated by two methods either by the approval process by budget manager or self-approving the budget as the budget is pre-approved (if the logged in user is also the budget manager) **(Figure 18)**.

Expenses Tab

This tab will not be visible if the setting for displaying commitments/invoices and estimates is set to false.

The estimates, commitments and the invoices will be displayed on this tab if selected to be shown.

The estimates are displayed with details such as title, estimate# (number), vendor, creation date, status and the estimated amount.

The commitments are displayed with details such as the title, commitment# (number), vendor, due date, status, committed and the balance amount.

The invoices are displayed with details such as title, invoice# (number), vendor, paid on date, status, amount and the reconciled amount.

New estimates/commitments/invoices can be added by clicking on the '**Add**' button or the selected estimates/commitments/invoices can be deleted by clicking on the '**Delete**' button. Each estimates/commitment/invoice title has a link to edit them.

The invoice amount can be reconciled with the actual paid amount for the program through the batch reconciliation process, which can be initiated by clicking on the '**Batch Reconciliation**' button **(Figure 21)**.

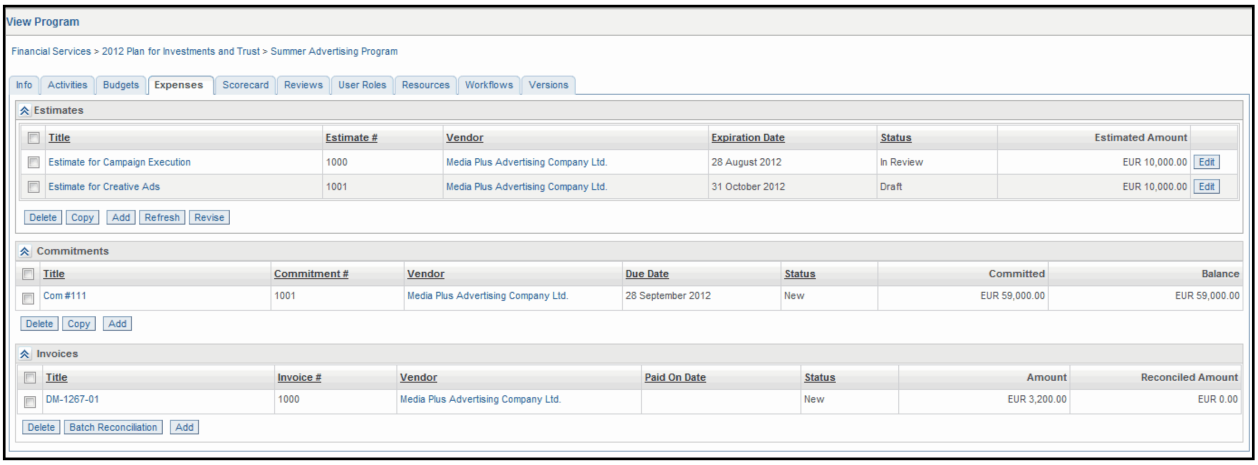


Figure No.21

- **Estimates**: Based on the setting in the Strategic Planner admin '**Display Estimates**' is true or false, the estimates section is displayed and the list of estimate approvals jobs in review screen is also displayed or hidden respectively. The following operations can be done for estimates **(Figure 21)**:
  Note: While copying or deleting an estimate a check is made to see if the Plan for this estimate is in the bulk update mode i.e. it is locked in the sandbox. If it is locked, the copy and delete operations are not allowed on the estimate. Once the Plan is released from the sandbox, the estimates can be copied and/or deleted.
  - **Delete** – The selected estimate can be deleted. When an estimate is deleted and email notification is sent out all the coordinators.
  - **Copy** – A user can select multiple Estimates from the list of estimates to make copies of the selected ones. Copy Estimates is an offline process. Once the 'Copy Estimates' transaction is completed, a notification is sent to the user. It informs the user of the status of the copied Estimates (either Success or Failure). The status of the newly copied Estimates is always 'Draft'. The Estimate#(number) is auto generated. The user can then update the Estimate Title, Type, Effective and Expiration Dates.
  - **Add** – Add new estimates. An estimate details screen is displayed. Refer to Section 4.7 for details.
  - **Refresh** – Refreshes the section with the changed values.
  - **Revise** – Select the estimate to be revised. Only the expired estimates can be revised. Refer to Expired Estimates section for more details.
- **Commitments**: Click on the '**Add**' button to add new commitments **(Figure 21)**. A create commitment screen is displayed; refer to Section 4.8.2 for details.
  An existing commitment can be copied across activities by clicking on the '**Copy**' button. See Section 4.8.1 for more details.
  By clicking on the '**View Commitments**' link on the left pane, a list of all the commitments for which the logged in user is the creator. From here the copy commitment interaction is also available.

- **Invoices**: Invoices can be added either against a commitment or against the Program/Campaign. Invoices can be added to closed activities in the system depending on the configuration in the system. The default setting does not allow invoices to be added to closed activities.
  To add an invoice against an existing commitment the user should traverse to the view commitment Screen by clicking on the commitment name link. Under the invoices section of the screen the user can add invoices by clicking on the '**Add**' button to add invoices, which are generated against the commitment. To add invoices for expenses for the program click on the '**Add**' button in the invoices section under the expenses tab of the view program/activity screen **(Figure 21)**. A create invoice screen is displayed where the invoice details can be entered **(Figure 22)**. After the invoice has been created it can be reconciled if it has been paid.
  By clicking on the '**View Invoices**' link on the left pane, a list of all the invoices for which the logged in user is the creator. Here the batch reconciliation operation is also available.

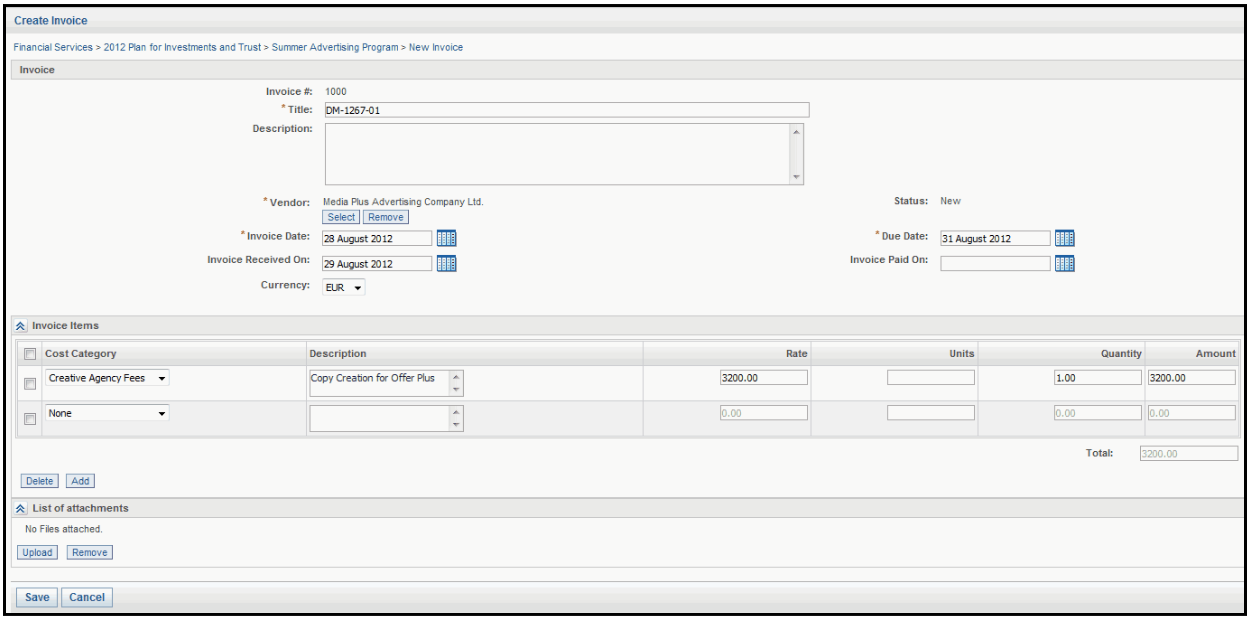


Figure No.22

Scorecard Tab

When the user views this section for the first time, the Default Metrics need to be set by clicking on the '**Set Default Metrics**'.

This section gives the information like measurements and performance indicators. The measurements have details such as the name, expected and actual values, measurement start and end dates for the Campaigns and the frequency. New measurements can be added by clicking on the '**Add**' button and selected measurements can be deleted by clicking on the '**Delete**' button. The measurements with the frequency as one time and having only one Actual value slot can be edited by clicking on the 'Edit' button. The measurements with the frequency more than one time have to be edited individually by clicking on the measurement name link. The performance indicators are displayed with information like expected and the actual values and can be recalculated by clicking on the '**Recalculate**' button **(Figure 23)**. If the user makes any changes to the measurements (Add/Edit/Delete), on the View Plan/Program/Activity screen on the Scorecard Tab, and Saves it, the system will automatically recalculate KPI's and give an explicit message to the user.

Note: The Recalculate button will still have to be clicked for the system to recalculate any KPI's that are based on budgetary values.

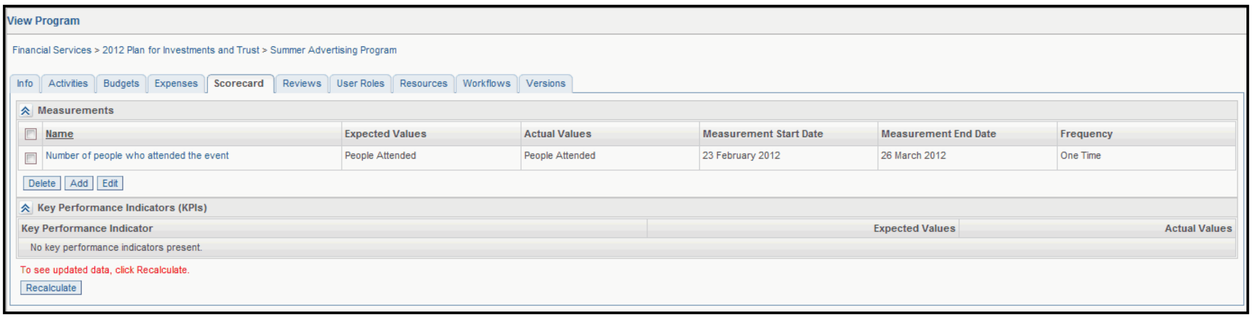


Figure No.23

Reviews Tab

This section displays the title and status and allows the user to view the reviews for the programs/activities/sub-activities selected. Here the user can delete a selected review by clicking on the '**Delete**' button or the user can initiate a review by clicking on the '**Initiate Review**' button, which displays a new screen to create a review and invite user/groups.

User Roles Tab

This section displays the details such as created and last updated by. The coordinators, budget managers and readers are displayed here. If the setting for propagation of authors and readers at the plan level to the lower level is set to 'True', then the users in the author and the reader roles at the plan level are added as activity coordinators in the program.

Existing users can be selected and deleted by clicking on the '**Delete**' button or new users can be added by clicking on the '**Add User**' button **(Figure 24)**.

The access level of each user can be viewed by selecting the user and clicking on the '**View Access**' button.

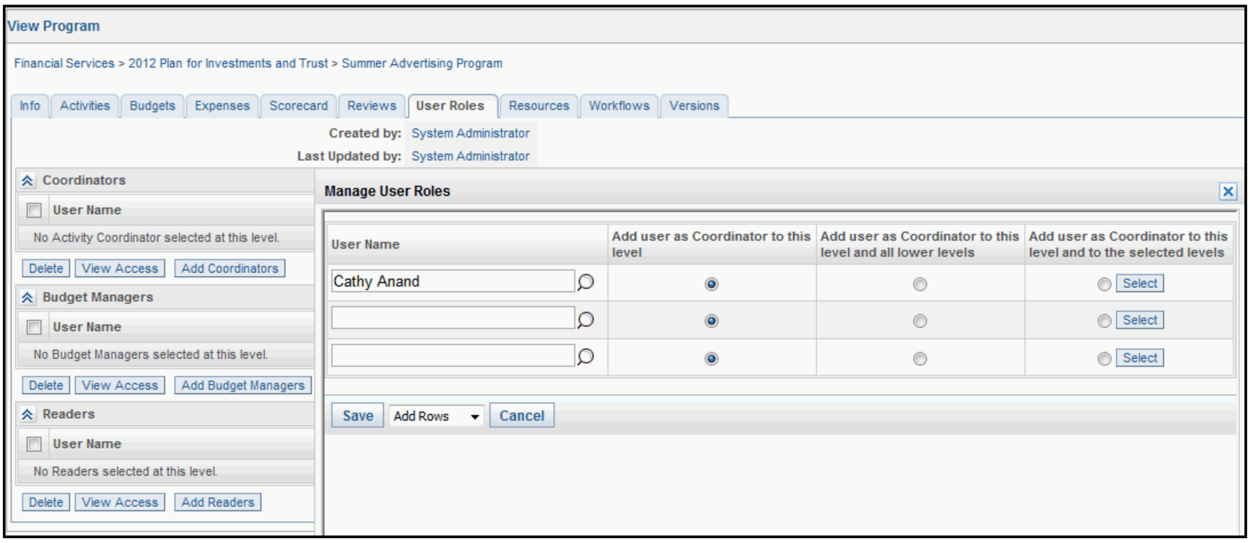
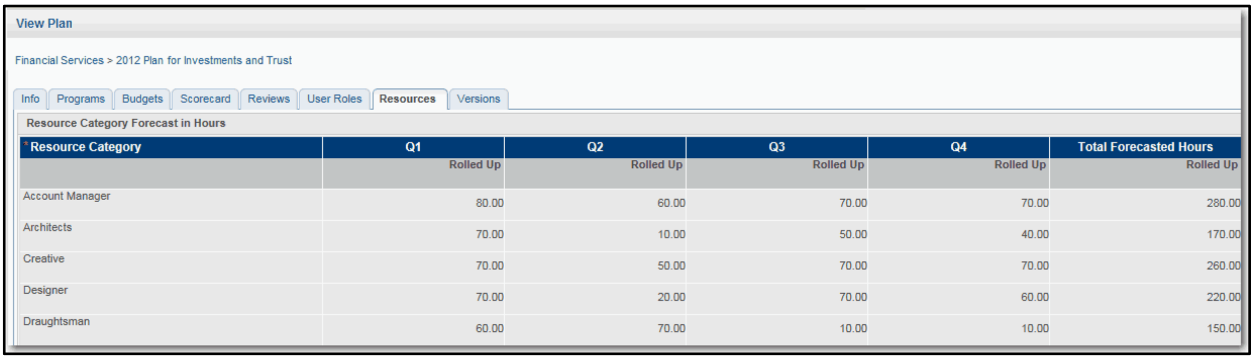


Figure No.24

Resources Tab

The allocated resources for the plan will be displayed in this tab in the form of a calendar. The resources can be requested and allocated using the 'Resource Planner' module.

Forecasting the resources required to participate in the execution of the Activities planned for the year can be done. This helps in planning for the resource requirements for the year and early anticipation of shortfalls in manpower and mitigation plans. The Forecast per Category of resources can be entered for each Activity in the Plan. These can be entered per Forecast Duration as defined in the system. For example, a monthly requirement of Designers for a particular Activity can be entered. This number then rolls up at the Plan level providing the Marketing Managers and Executives visibility into the total Resource requirements in terms of Designers for all activities for each month.



Resource Category	Q1	Q2	Q3	Q4	Total Forecasted Hours
	Rolled Up	Rolled Up	Rolled Up	Rolled Up	Rolled Up
Account Manager	80.00	60.00	70.00	70.00	280.00
Architects	70.00	10.00	50.00	40.00	170.00
Creative	70.00	50.00	70.00	70.00	260.00
Designer	70.00	20.00	70.00	60.00	220.00
Draughtsman	60.00	70.00	10.00	10.00	150.00

Figure No.25

Workflow Tab

To Initiate and associate a Brief/Project for an Activity/Program. The 'Workflows Tab' for an Activity will have the Projects and Briefs list that are associated with the selected Activity (depending on the configuration settings done by the administrator). A selected project/brief can be deleted by clicking on the '**Delete**' button (depending on the configuration settings done by the administrator the deletion of briefs/projects can be restricted or authorized).

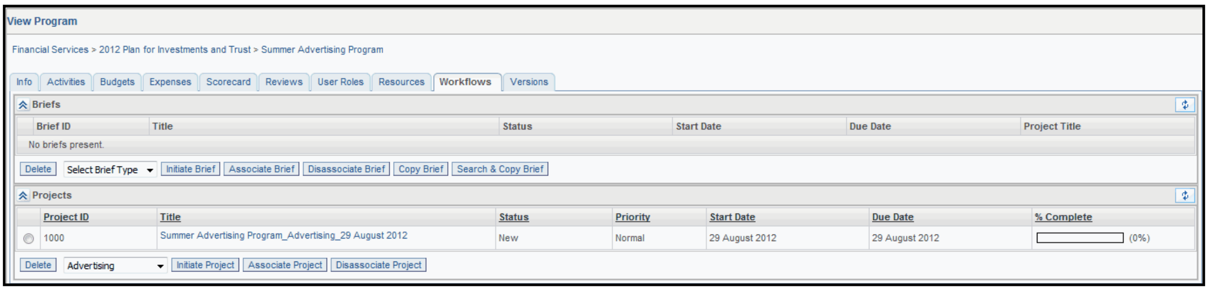


Figure No.26

The following operations can be done on this screen **(Figure 26)**:

- **Initiate Project/Brief** – A new brief/project can be initiated.
- **Associate Brief/Associate Project** – A brief/project can be associated to an existing project/brief respectively.
- **Disassociate Brief/Disassociate Brief** – Disassociate a project/brief respectively.

For Briefs:

- **Copy Brief –** A selected brief can be copied.

- **Search & Copy Brief** – Existing Briefs can be searched and copied into the activity. A search &copy brief popup is displayed where the user can enter filters to search for a brief. A brief can be copied only if:
  - o Complete access required is 'True' and user having complete access.
    Complete access required is 'False' or user does not have this access then the user has to be either the creator, coordinator or marketing owner.
  - o Activity status is not Closed, Pending or Under Review.
    Allow a workflow operation in case of budget rejection is 'No' and activity status is not budget rejected.

Versions Tab

This section displays the Version list with details such as Creation Date, Creator and Comments. Existing Versions can be selected and deleted by clicking on the '**Delete**' button.

Moving Activities across Programs/Activities

Activities can be moved from one Program to another within the same Plan. The whole hierarchy will be moved. Activities of any level can be moved to a different program/activity but at the same level within the Plan. Activities cannot be moved from one Plan to another.

After selecting the activity and clicking on the '**Move**' button the user has to select the Program where the activity is to be moved **(Figure 27)** and click on the '**Select**' button.

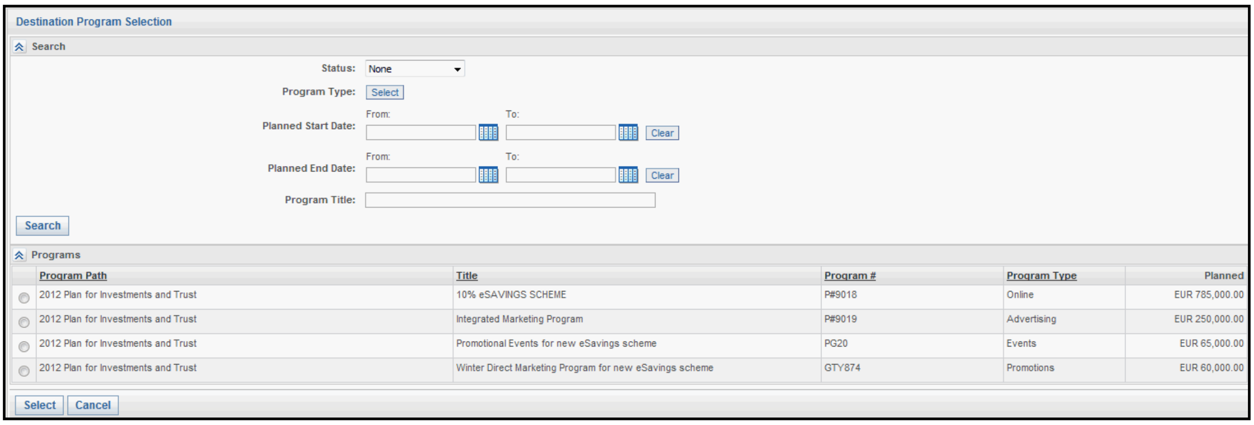
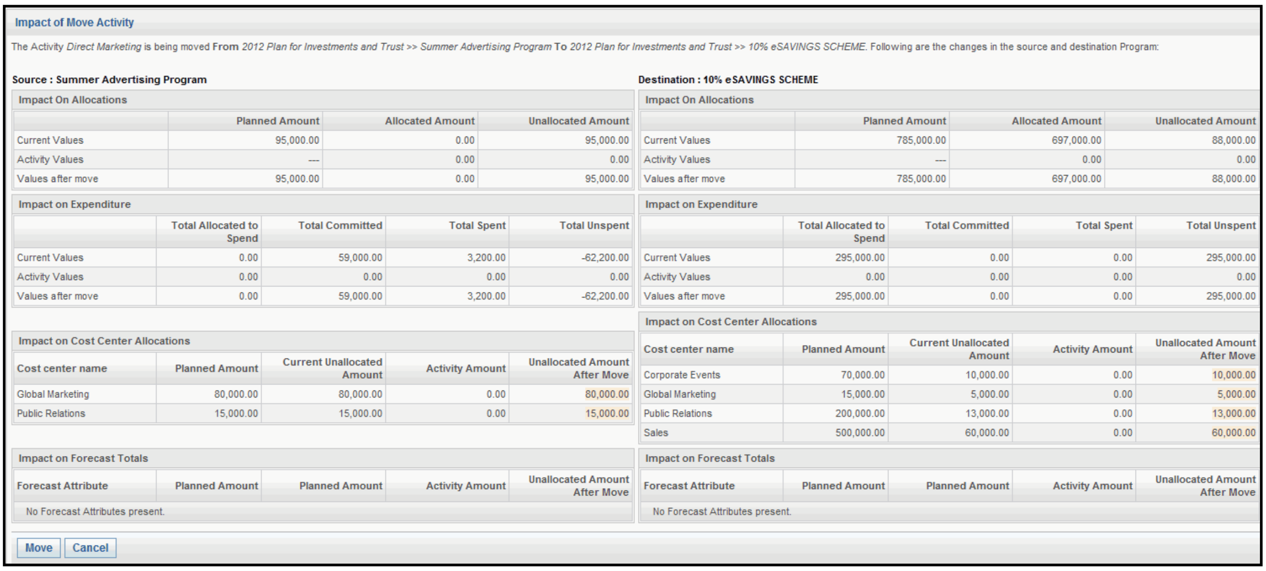


Figure No.27

After the Program is selected following screen appears with the amounts that are affected because of the move **(Figure 28)**. The user can click on the '**Move**' button or can cancel the operation by clicking on the '**Cancel**' button.



Impact of Move Activity

The Activity *Direct Marketing* is being moved **From** *2012 Plan for Investments and Trust >> Summer Advertising Program* **To** *2012 Plan for Investments and Trust >> 10% eSAVINGS SCHEME*. Following are the changes in the source and destination Program:

Source : Summer Advertising Program

Impact On Allocations

	Planned Amount	Allocated Amount	Unallocated Amount
Current Values	95,000.00	0.00	95,000.00
Activity Values	---	0.00	0.00
Values after move	95,000.00	0.00	95,000.00

Impact on Expenditure

	Total Allocated to Spend	Total Committed	Total Spent	Total Unspent
Current Values	0.00	59,000.00	3,200.00	-62,200.00
Activity Values	0.00	0.00	0.00	0.00
Values after move	0.00	59,000.00	3,200.00	-62,200.00

Impact on Cost Center Allocations

Cost center name	Planned Amount	Current Unallocated Amount	Activity Amount	Unallocated Amount After Move
Global Marketing	80,000.00	80,000.00	0.00	80,000.00
Public Relations	15,000.00	15,000.00	0.00	15,000.00

Impact on Forecast Totals

Forecast Attribute	Planned Amount	Planned Amount	Activity Amount	Unallocated Amount After Move
No Forecast Attributes present.				

Destination : 10% eSAVINGS SCHEME

Impact On Allocations

	Planned Amount	Allocated Amount	Unallocated Amount
Current Values	785,000.00	697,000.00	88,000.00
Activity Values	---	0.00	0.00
Values after move	785,000.00	697,000.00	88,000.00

Impact on Expenditure

	Total Allocated to Spend	Total Committed	Total Spent	Total Unspent
Current Values	295,000.00	0.00	0.00	295,000.00
Activity Values	0.00	0.00	0.00	0.00
Values after move	295,000.00	0.00	0.00	295,000.00

Impact on Cost Center Allocations

Cost center name	Planned Amount	Current Unallocated Amount	Activity Amount	Unallocated Amount After Move
Corporate Events	70,000.00	10,000.00	0.00	10,000.00
Global Marketing	15,000.00	5,000.00	0.00	5,000.00
Public Relations	200,000.00	13,000.00	0.00	13,000.00
Sales	500,000.00	60,000.00	0.00	60,000.00

Impact on Forecast Totals

Forecast Attribute	Planned Amount	Planned Amount	Activity Amount	Unallocated Amount After Move
No Forecast Attributes present.				

Move Cancel

Figure No.28

To move an Activity the following checks should be done:

- **Cost Centers and Financial summary** – The cost centers at any level are selected from the ones selected at a higher level. While moving an activity, if the new parent does not have one of the cost centers selected at the activity level selected, then this activity cannot be moved to the new parent program. In order to move the activity the user will have to add the cost center manually to the destination parent, or delete the cost center from the entire sub-hierarchy of the activity being moved.
- **The total Planned amount of the moved activity should be available at the new parent program** – In order to move the activity in this case, the user will have to increase the planned amount at the destination. Even if the cost center is present at the destination parent, the amount unallocated for the cost center at that parent should be more than or equal to the amount allocated for the cost center at the moved activity. If the cost center at the parent does not have enough amounts, the activity will not be moved. To move the activity user has to increase the cost center allocation.
- **Forecasting** – To move the activity, the user will have to remove the forecast attribute from the activity being moved and its sub-hierarchy or add it to the destination parent.

  If the forecast attribute is present at the destination parent, then the amount of the moved activity will be deducted from the destination parent's forecast from the appropriate bucket. If sufficient amount is not present in the bucket, then the activity will not be moved.

  In order to move the activity the forecast allocation will have to be increased at the destination parent, for that forecast attribute.

Impact of move activity

Changes for:	Changes at source	Changes at the destination	Changes in the moved activity	Changes to the sub-hierarchy
Cost centers	The amount for each of the cost centers should be added to the unallocated amount of the parent for	The amount for each of the cost centers in the activity should be subtracted for the cost	No change	No change

	that cost center	centers.		
Financial summary values	The rollups for allocations will be added to the parent's roll up values. The expenditure rollups will be subtracted. These changes will be propagated right to the level 1 in the parent hierarchy	The allocation rollup values will be subtracted from the parent roll up values. The expenditure roll up will be added. These changes will be propagated right to the level1 in the parent hierarchy	No change	No change
Activity Path	No change	No change	Changes to reflect the new parent.	Changes to reflect the new parent.
Forecast	Remaining totals will change. The totals for the attribute will increase by the amount of the attribute. The total forecasted will decrease.	Remaining totals will change. The totals for the attribute will decrease by the amount of the attribute. The total forecasted will increase.	No Change	No Change

Estimate Management

The framework to create estimates projects, resources, out-of-pocket expenses, etc. required by the vendor to complete a specific ad-hoc project or the annual projects. This enables fulfillment of all Financial Management-related steps of the Agency Management process in the most efficient and cost effective manner with regards to:

- Annual SOW/Staffing Plan creation and corresponding online approval(s)
- Ongoing SOW modifications and corresponding approvals, if applicable
- Tracking of monthly agency actuals.
- Report generation

Adding Estimates

To add estimates click on the '**Add**' button **(Figure 21)** in the estimates section (from expenses tab). The estimate details screen is displayed **(Figure 29)**. The following details need to be entered:

- **Title** – The Estimate name.
- **Estimate #** - Estimate number (if it is set to auto-generated then system generates this number and it is in read-only mode).
- **Estimate Type** – The type can be either annual or project.
- **Effective Date** – The date the estimate is effective from.
- **Expiration Date** – The expiry date of the estimate.

The vendors belonging to the logged in user's Business Unit only can be viewed. The following vendor details need to be entered:

- **Vendor** – Select the vendor this estimate needs to be sent to.
- **Vendor Resource** – Select a resource from the above selected vendor who will be part of the project.
- **Vendor Contact** – Select the contact for the vendor.

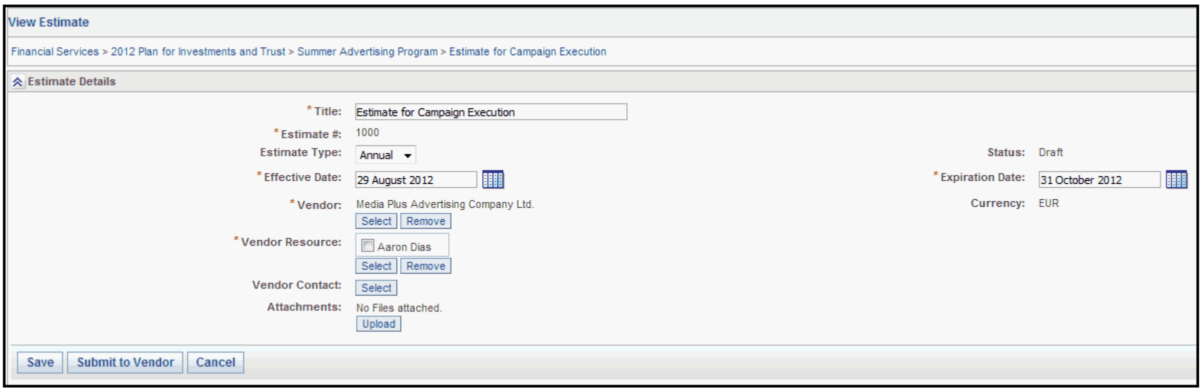


Figure No.29

The estimate can be submitted to the vendor but for adding the work items to the estimates save the estimate by clicking on the '**Save**' button, a view estimate details screen is displayed **(Figure 30)**. The estimate details can be edited by clicking on the '**Edit**' button.

The Estimate Coordinators can be added. This user has the same rights as the Estimate Creator. This user can edit, change, approve the estimate etc.

Work Items:

- The work items can be added to the estimates by clicking on the '**Add**' button.
- A copy of the selected work items can be made by selecting the work items from the list and clicking on the '**Copy**' button. Copy work items is an online process, which means that once all the selected work items are copied, the list of work items is refreshed immediately. The user can then update work item title, category, type and the strategic value. Work item# can be auto-generated.
- Two users cannot work on the same Work Item for the Estimate simultaneously. When the first user is editing the Work Item, the second user cannot select the same Work Item for Edit/Delete operations untill the first user signs out of the system or saves the Work Item details. The work item gets locked for the second user and a '**Unlock**' button is displayed next to the work item. If the second user clicks on the '**Unlock**' button while the first user is working on it then a message is displayed saying that the work item is being edited by another user and the work item is displayed in a read only screen. The second user can unlock it after the first user has saved/canceled the work item details.

The estimate can be submitted to the vendor by clicking on the '**Submit to Vendor**' button.

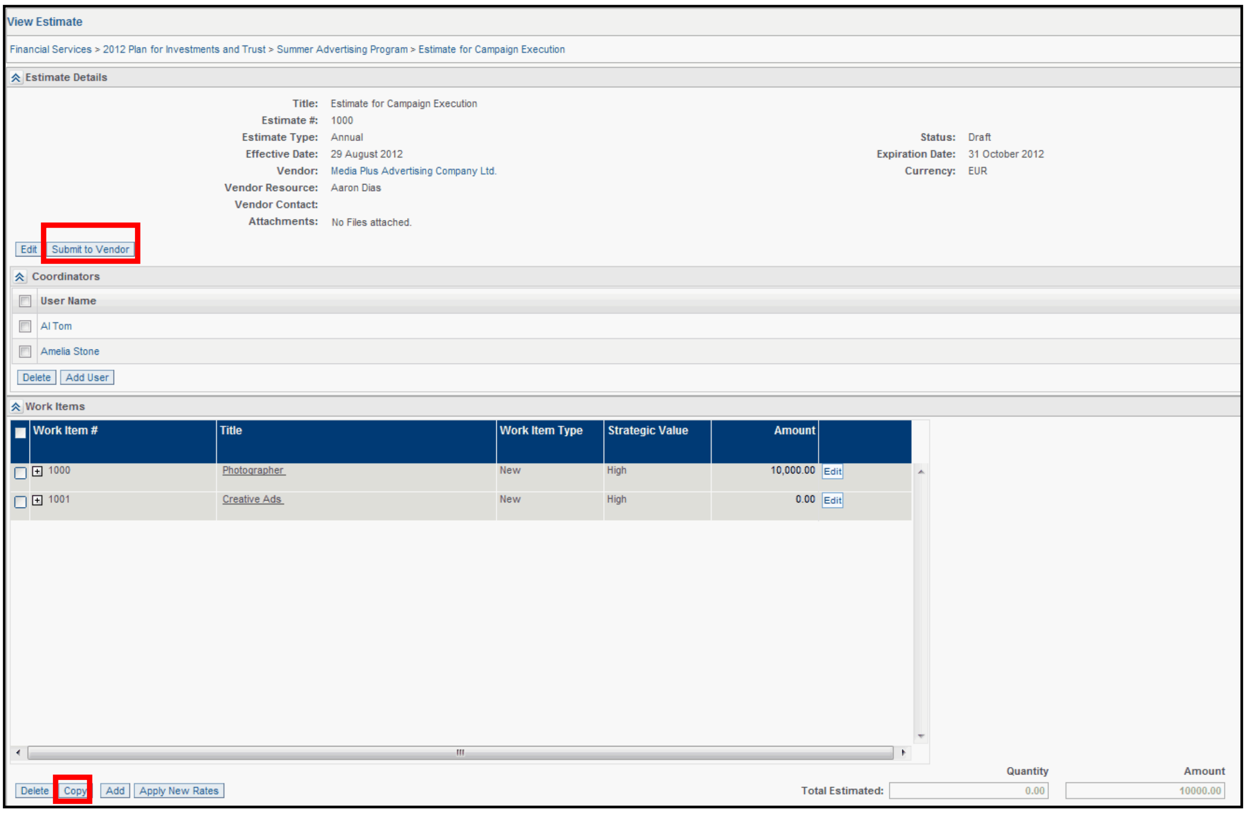


Figure No.30

While viewing the estimate the vendor details can be viewed by clicking on the vendor name link wherever it appears in the system.

Once the estimate is submitted to the vendor, the vendor can log into the PCM solution to view the estimate.

Expired Estimates

An estimate is marked expired if:

1. The estimate end date is less that the current date.
2. Estimate status is not ‘Submitted to Vendor’.

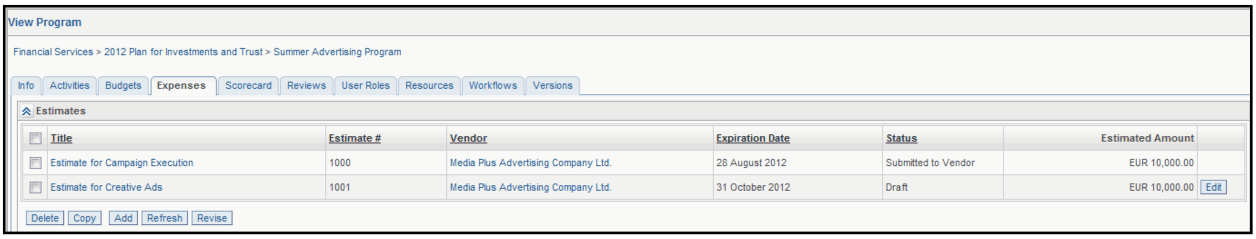


Figure No.31

The user can view the expired estimate in a read only format. To revise these estimates, select it and click on the ‘**Revise**’ button. The reason for the revision is asked. The estimate status is then changed to ‘Revised’. Only the expired estimates can be revised.

The estimate creator/coordinator can do following operations:

1. Submit such Estimate to the vendor.

2. Estimate review (either approves or rejects Estimate).
3. Edit Work Item or Estimate details.

Additional details regarding Estimates revision:

- When an Estimate expires, the approval jobs for such Estimate (if exists) are Cancelled. Reviewers of such job cannot review the Estimate.
- When the Estimate is revised, notification sent to the creator, coordinator(s) and vendor resource(s).
- A version is created when an Estimate is revised. The revised reason is added as comment for the version when Estimate is revised.

Viewing Estimates by the Vendor

This allows the agency to make necessary changes to the initial statement of work.

The vendor resources can access the estimate assigned to them by logging into the PCM solution. Click on the '**Estimates**' link on the left pane (PCM solution). All estimates which are submitted to vendor to define new work-items or to modify the existing ones will be displayed. The vendor resource can update an estimate by defining the work-items and re-submit it to the initiator of an estimate for the review process.

The initiator reviews it and either approves or rejects it. If rejected then the estimate is resubmitted to vendor for the required modifications. If the estimate is approved by the initiator then it is submitted for further review process by the agency seniors and marketing seniors.

If the estimate is rejected by any of the reviewers then it is resubmitted to the vendor for further modifications. If the estimate is approved by all reviewers then the initiator can mark it is as completed.

The system captures the original SOW that is submitted by the agency to the organization, as well as the final negotiated SOW. Final negotiated SOW will serve as the baseline SOW for the full year.

Importing/Viewing the Actual Item details

The vendor can import the actual item details against an estimate through the PCM solution. Click on the '**Import Actuals**' link on the left pane. The following file type can be selected for downloading a sample template:

1. **Agency Hours Template** – In this template the plan name, work item number, resource category path, resource category name and the quantity are to filled in for a particular month.
2. **OOP Template** - In this template the plan name, work item number, resource category path, resource category name and the total cost are to filled in for a particular month.

After filling in the required excel sheet for the month, the vendor uploads it by browsing and then importing it.

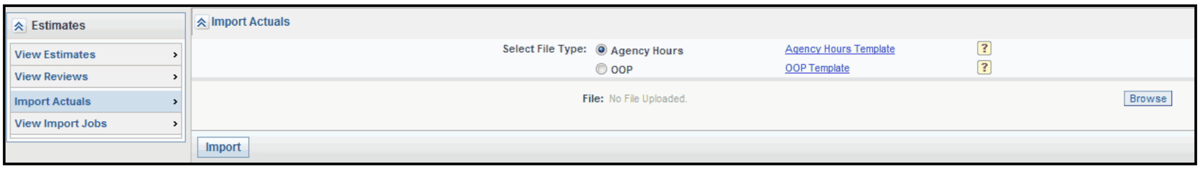


Figure No.32

Based on a configuration setting, vendors will be allowed to import unbudgeted actuals (A resource category not present in the system). The unbudgeted items are displayed as 'Unbudgeted Items' in the Actuals list.

Once the file has been imported the status of the job can be viewed by clicking on the '**View Import Jobs**' link. A list of jobs with their status is displayed.

A notification is sent to the owner/creator of the actuals job, once the actuals are imported into the system. This happens for both successful and failed imports.

Reviewing Estimates and Creating Workflows

Once the status of the estimate is 'Submitted to Vendor, click on the estimate name link to view the estimate. A review estimate screen is displayed with the following tabs:

- **Estimate** – The estimate details, work items and the reviews are displayed **(Figure 33)**. The estimate can be marked as complete by clicking on the '**Mark as Completed**' button.

  Note: Even if the estimate is marked as complete the vendor resource is allowed to revise it. If the estimate is revised it needs to go through the approval process again.

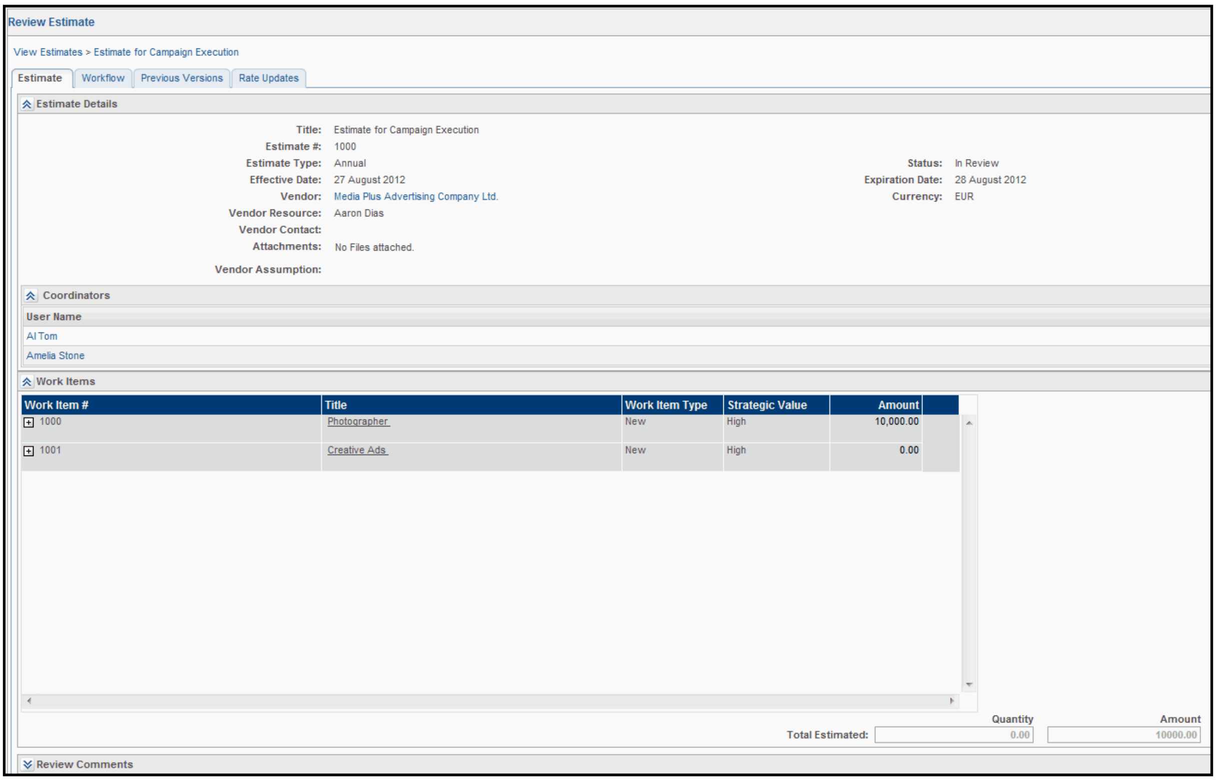


Figure No.33

- **Workflow** – The initiator of the estimate can initiate a workflow by selecting a job type.
- **Previous versions** – The versions for the estimates will be displayed here. Versions are created in the following scenarios:
  - When the vendor submits the estimate for review.
  - When the AMT approves the estimate.
  - When a revision of an estimate is created.
  - When an estimate is marked as complete.

Commitments/Purchase Order (PO)

Making a copy of existing Commitments

A commitment can be copied from the Plan (Expenses tab) or from the Budgets.

Select the commitments to be copied and click on the '**Copy**' button. The marketing activity can be selected from the 'Select marketing activity to copy the commitment to' popup. The radio buttons for activities to which the user has no access to will be disabled.

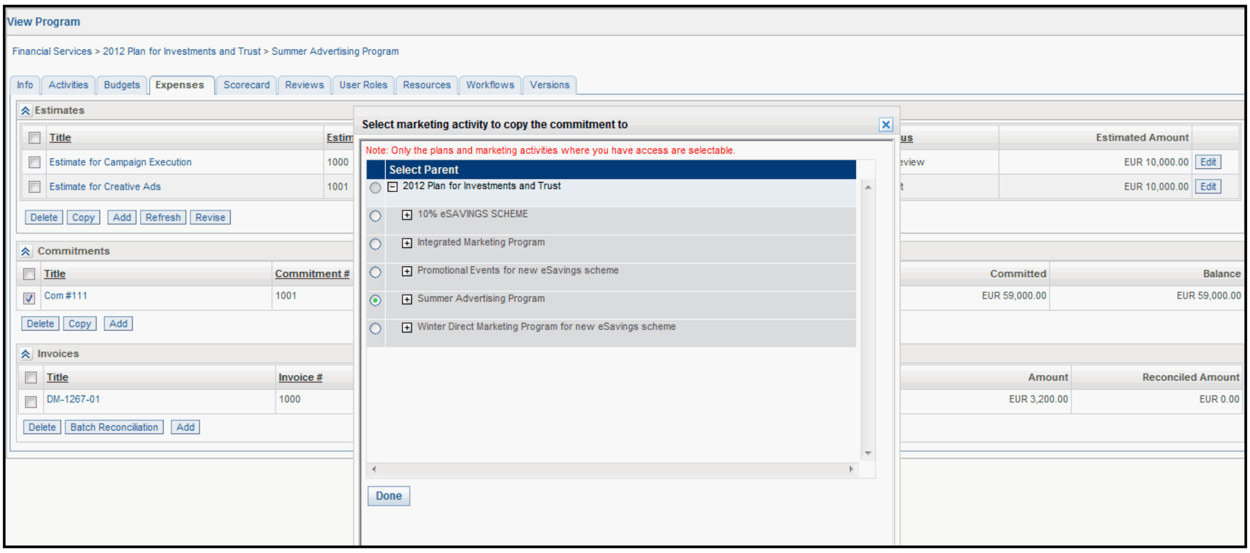


Figure No.34

A commitment with any status can be copied to an activity provided the user has access to the activity or the user is a Creator, Owner, Coordinator or Budget manager.

Commitments cannot be copied to another activity in the following case:

- Activity status is Closed, Pending or Under Review.
- Activity status is 'Budget Rejected' and the setting in the Planner admin for 'AllowOperationInBudgetRejection' is 'No'. If the setting 'AllowOperationInBudgetRejection' is 'Yes' then the commitment can be copied even if the budget is rejected.
- If the activity level is 1 and the setting in the Planner admin for 'AllowBudgetingInFirstLevel' is 'False'.
- While copying the commitment the activities for which the user has no access will appear disabled. The invoices in a commitment are not copied but the amounts get copied to the new commitment and the amounts are calculated till the plan level. The new commitment number needs to be entered or is auto generated based on the configuration settings.
- Setting ExpenseTrackingRequired is 'False'.

The newly created commitment can then be saved with the necessary changes in the system.

Adding Commitments

To add commitments click on the '**Add**' button **(Figure 21)** in the commitments section. The create commitments screen is displayed **(Figure 35)**. The following details need to be entered:

- **Commitment** – Details such as commitment # (number which could be auto generated depending on the setting), title, description, committed on, payment due on, the vendor, the currency and the vendor resource need to be added. The created on date, requisitioner (creator of the commitment) and the status are displayed.

- **Commitment Items** – The details for each commitment item such as cost category, description, rate, units and quantity are added here. The amount and the total is automatically calculated. More commitment items could be added by clicking on the '**Add**' button. A selected commitment item can be deleted by clicking on the '**Delete**' button.
- **Payment Schedule** – By clicking on the '**Add**' button new payment schedules may be added. The user gives details such as date, amounts, notes and the status for each payment schedule. A selected payment schedule can be deleted by clicking on the '**Delete**' button.
- **Attachments** – The user can add attachments for the commitments by clicking on the '**Add**' button.

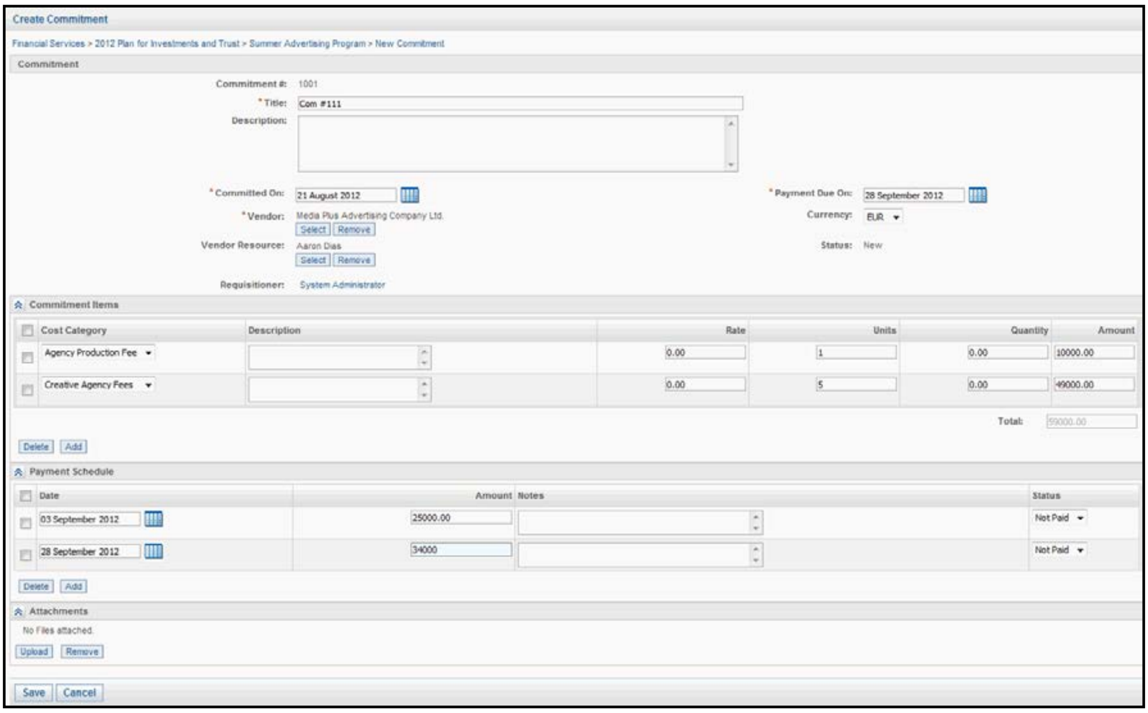


Figure No.35

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

Note: Based on the configuration certain checks are made such that if the activity budget does not have sufficient funds for the commitment, then the system will not allow the commitment to be saved.

Once the commitment is saved a view commitment screen is displayed **(Figure 36)** with all the commitment details in the info tab. Invoices can be added. If the approval is set on then invoices can be added only after the internal and vendor approval is done. The following operations can be performed on this screen:

- **Edit Commitment –** The commitment can be edited.
- **Close Commitment** – The commitment can be closed. When a commitment is closed the outstanding amount gets released to the plan level. After all the invoices have come in and nothing more needs to be added to the commitment then the commitment can be closed.
- **Commitment Approval** – If commitment approvals is set to 'True' in the planner admin then a commitment needs to be sent for a review or else the review part can be skipped.

- **Void Commitment** - At any point of time, before invoices are raised against the PO, a commitment can be made void. The outstanding amounts get released till the plan level. The necessary calculations are managed in the system for changes in the budgets as a result of the voiding of the PO. The amounts in the commitment will be displayed for history purpose even if the commitment is voided. The necessary notifications are also sent to the relevant parties involved. Once the commitment is voided no operations can be performed on it.

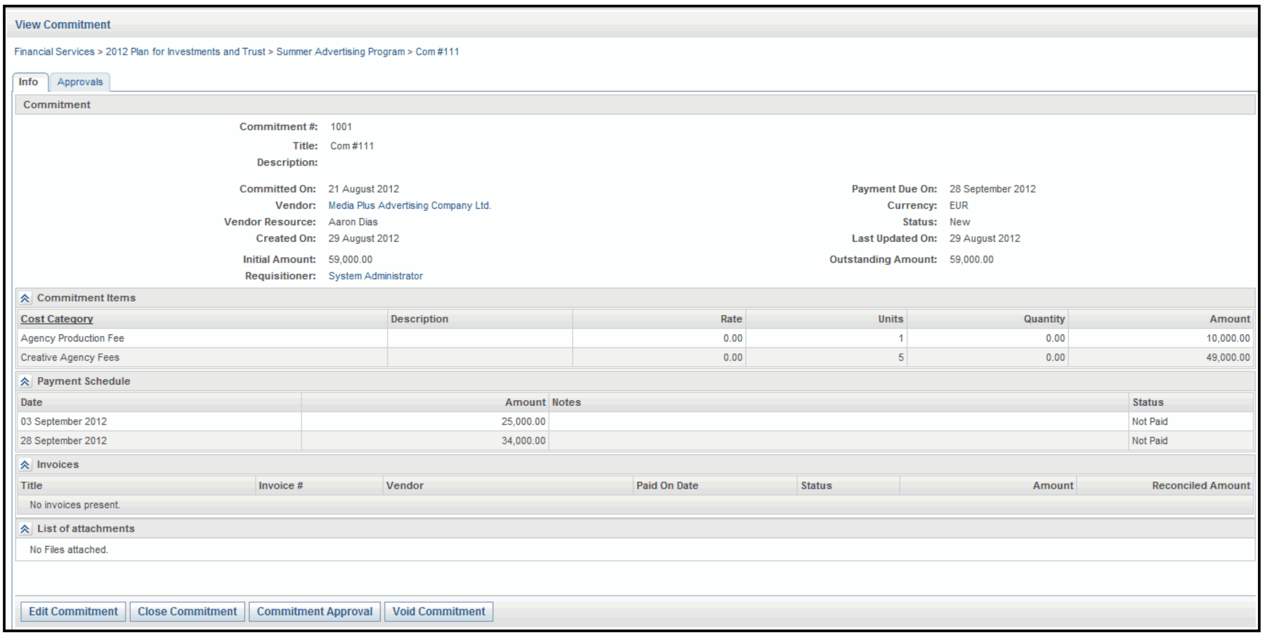


Figure No.36

Approvals tab on the view commitment screen displays the internal and the vendor reviews with details such as the job name, job status, review status, start and due date and the % complete.

Routing a Commitment for Approval

Based on a configuration setting, the commitments can be routed out for approval to a selected set of users within the organization. This is similar to an approval job. The system manages the status of the approval job and also has the ability to decide if the route should terminate on rejection by specific reviewers. A user having edit access can edit the job even after it has been submitted.

The approver needs to go to the approvals module and click on the 'My Reviews' link to view the commitment sent for review. The commitment can be approved or rejected by the approver.

If the commitment is rejected then the approvals cycle needs to be started again till the commitment is approved internally.

Once the commitment has been approved internally then the '**Commitment Approval**' button on the view commitment screen **(Figure 36)** in the info tab changes to the '**Generate PO**' button. A PO can be generated by clicking the button. The PO can then be routed to the vendor's resources for acknowledgement. The review cycle will go on till the vendor approves the commitment.

Creating and Managing Activities

Under the activities tab in the '**View Program**' screen list of activities are displayed **(Figure 17)**. Each programs/campaigns title has a link. When clicked it traverses to view activity screen that gives detailed information about the activity. The selected program/campaign can be deleted by clicking on the 'X' button.

To add a new activity click on the '**Add**' button, creating an activity is similar to creating a program/campaign. Clicking on '**Save'** button on a create activity screen will create a new activity and will display a '**View Activity**' screen, which displays the activity information.

View Activity information

A view activity screen has a tabbed layout with information for the program/campaign grouped under various tabs similar to program/campaign information screen **(Figure 37)**. Instead of a 'Activities' tab there is 'Sub-Activity' tab, which allows the user to list, add and update sub-activities for the selected activity. Clicking on the '**Save Version**' button can save the Version.

A '**View Audit History**' link is displayed which when clicked displays the details of the changes made in the activity information.

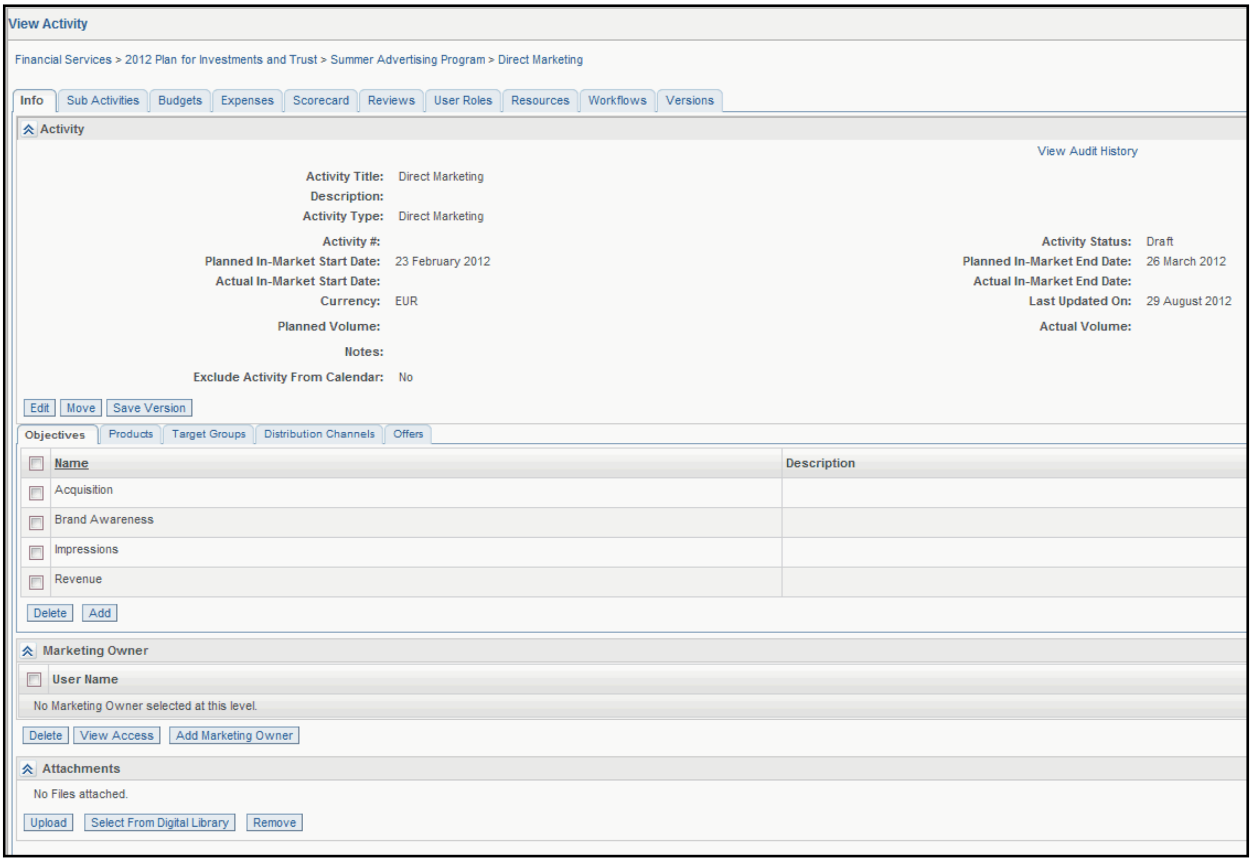


Figure No.37

Best Practices Builder

If the setting for 'Best Practices Builder' is set to yes in the planner admin then this feature will be active. Best practices per activity type or communication channel are configured in the system.

Best Practices can be applied at any level such as Program, Campaign or Activity depending on the activity type selected by the admin while configuring it.

In the following example **(Figure 38)** it is applied at the Campaign level so there will another tab with the configuration name '**Print**' where all the additional information of the Campaign configured by the admin will be displayed.

Note: The information in the '<Best Practices>' , Scorecard and workflows tab, is visible only if the admin has populated all the fields in the best practices builder in the Strategic Planner admin.

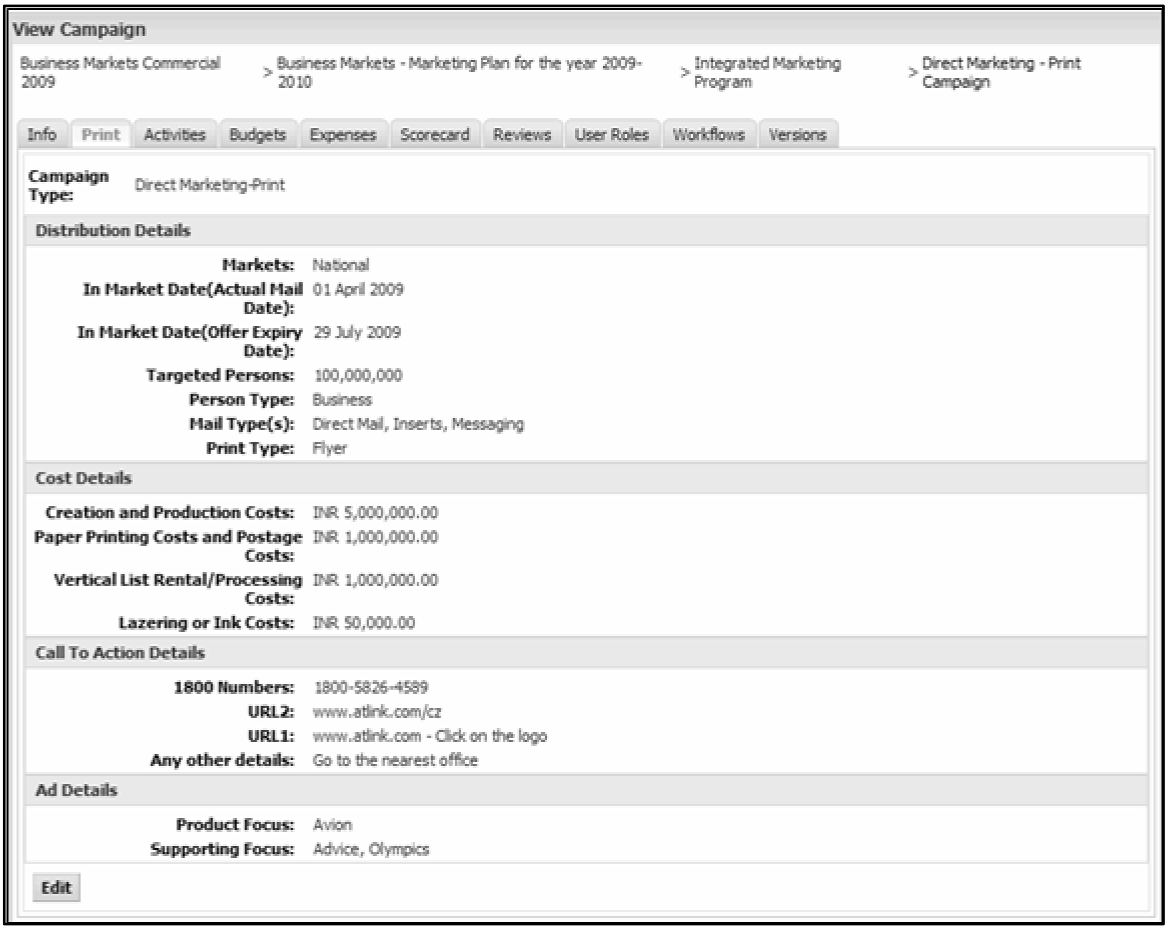


Figure No.38

In the '**Scorecard**' tab **(Figure 39)** the measurements displayed are one's selected by the admin while creating the best practices.

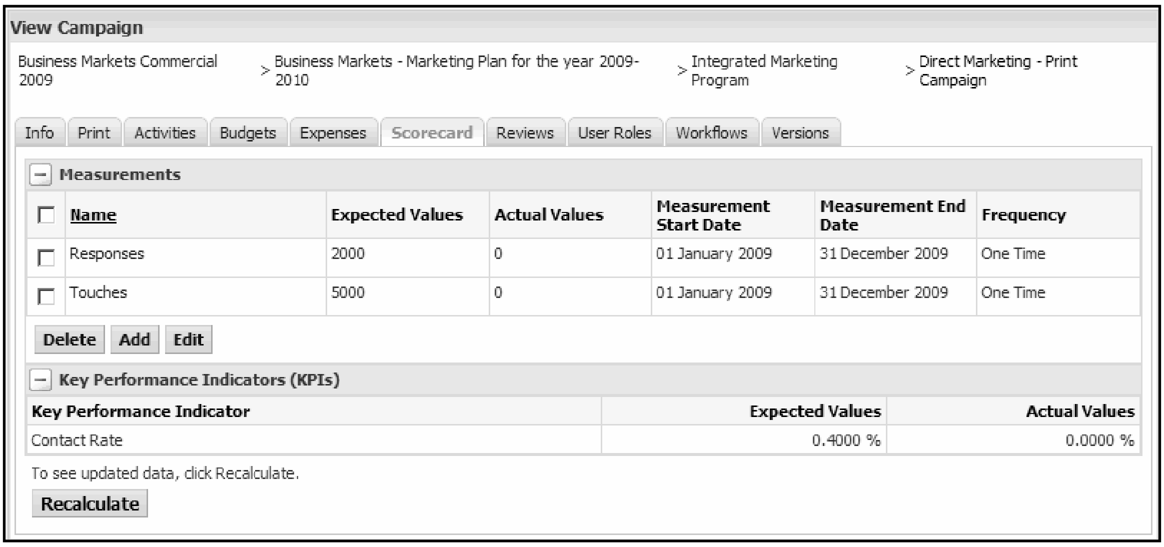


Figure No.39

In the '**Workflows**' tab **(Figure 40)** the briefs and the projects displayed are one's selected by the admin while creating the best practices.

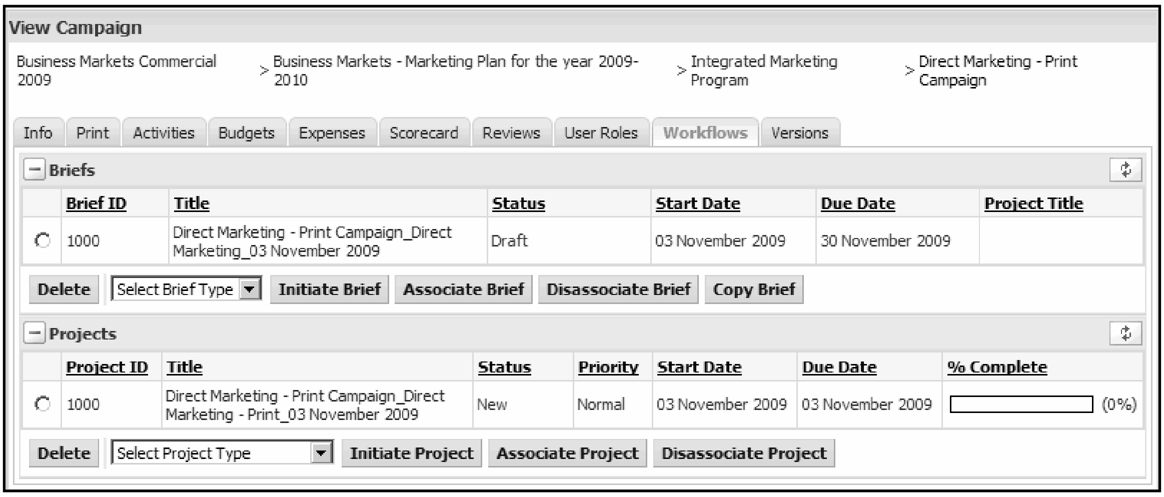


Figure No.40

Budgets

1.1.1. Business Rules for Budgeting

Scenario 1: Cost Center wise budget allocations for Plan, Campaigns or Activities:

Step1- We have a Plan 1 with two cost centers whose planned amounts are:

Cost Center 1 – Planned Amount $100

Cost Center 2 – Planned Amount $100.

Therefore now the amounts for the Plan1 are as follows:

Cost Center 1:Planned amount: $100 (-) Allocated amount: 0$ = Unallocated: $100

Cost Center 2: Planned amount: $100 (-) Allocated amount: 0$= Unallocated: $100

Step 2-We create a Campaign 1 for Plan 1. We select Cost Center 1 for this campaign. We allocate $50 to this campaign from cost center1.

Therefore now the amounts for the Plan1 are as following:

Cost Center 1:Planned amount: $100 (-) Allocated: $ 50 = Unallocated: $50

Cost Center 2: Planned amount: $100 (-) Allocated:0$= Unallocated: $100

The amounts for the Campaign1 are as following:

Cost Center 1:Planned amount: $50 (-) Allocated: $ 0 = Unallocated: $50

Step 3 - We create an Activity 1 for Campaign 1. We select Cost Center 1 for this activity. We allocate $50 to this activity from cost center1.

Therefore now the amounts for the Campaign1 are as following:

Cost Center 1: Planned amount: $50 (-) Allocated: $ 50 = Unallocated: $0

The amounts for the Activity1 are as following:

Cost Center 1: Planned amount: $50 (-) Allocated: 0$ = Unallocated: $50

Step 4 – We try to create an Activity 2 for Campaign1.However the system does not let us create it as there is only one Cost Center1 for Campaign 1 and the Unallocated amount for it is $0.

Step 5 – We can however create a Campaign 2 for Plan 1 with Cost Center 2 as the selected cost center since the unallocated amount for the Cost Center 2 is $100. The Planned amount for Campaign 2 can be up to $100 from Cost Center 2 says $75.

Scenario 2: Cost Center wise allocation for spending for Campaigns or Activities:

Activity level allocation for spends – For Activity1:

The budgeted amounts for the Activity1 are as follows:

Cost Center 1: Planned amount: $50 (-) Allocated: 0$ =Unallocated: $50

Step 6 - If $30 is the spending planned for this Activity, that amount is called the Allocated to Spend for Activity 1. So now the amounts for Activity1 are:

Cost Center 1: Planned amount: $50 (-) Allocated to Spend: $30 = Unallocated: $20

Campaign level allocation for spends – For Campaign1:

The budgeted amounts for the Campaign 1 are as follows:

Cost Center 1: Planned amount: $50 (-) Allocated: $ 50 = Unallocated: $0

There was no allocated to spend at Campaign 1 level. Therefore the entire Planned amount was allocated to Activity1 below it.

Campaign level allocation for spends – For Campaign2:

The budgeted amounts for the Campaign2 are as follows:

Cost Center 2: Planned amount: $75 (-) Allocated: 0$ =Unallocated: $75

Step 7 - If $75 is the spending planned for this Campaign, that amount is called the Allocated to Spend for Campaign2.

So now the amounts for Campaign2 are:

Cost Center 2: Planned amount: $75 (-) Allocated to Spend: $75 = Unallocated: $0

In this case, no allocations can be made beyond this, as the unallocated amount is $0.

Scenario 3: Cost Center wise spending for Campaigns or Activities:

Activity level commitment for spends – For Activity1:

Cost Center 1: Planned amount: $50 (-) Allocated to Spend: $30 = Unallocated: $20

Step 8 - If the committed amount (for spending) for Activity1 is $20.

Then, the amounts for Activity 1 are now as follows:

Allocated to Spend: $30 (-) Committed amount: $20 = Unspent amount: $10

Activity level spends – For Activity 1:

Step 9 -If we now spend $10 on Activity1,

Then, the amounts for Activity 1 are now as follows:

Allocated to Spend: $30 (-) {Committed amount: $20 (+) Spent amount: $10} = Unspent amount: $0

1.1.2. View Budgets

Click on the '**Budgets**' link on the left pane **(Figure 1**). There are three links on the left pane:

A View Budgets screen is displayed with the following sections:

Search Budgets: The user can search for Budget by giving information like the Business Unit, Fiscal Year, Activity Title and Activity #(number) then clicking on the '**Search**' button.

Budgets: All the Budgets reviewed by the logged in user are displayed with details such as Title, Activity#(number), Activity Type, Status, Planned, Committed and the Spent amounts and the Budget Manager.

Pending Budgets: The pending budgets, which the logged in user is the Budget Manager for are displayed with details such as Title, Activity# (number), Activity Type, Status, Planned Start and End Dates, Planned Amount and the Budget Manager. By clicking on the Budget title link the user is taken to the Budget Manager: View Budget screen. The Program information, financial information and the user roles are displayed in a tabbed view. The Budget Manager can put in the comments for the budget and approve/reject the budget by clicking on the '**Approve**'/'**Reject**' buttons respectively.

Impact of Budget Rejection

Tab	Operations Allowed
Info	Editing the activity information. Moving an activity. Save version for an activity. Add/delete objectives. Add/delete of Products. Add/delete of Target Groups. Add/delete of Distribution Channels. Add/delete of attachments.
Activities/Sub Activities	Add/delete of activities at the lower level. Move activity.
Budget	Add/Delete of cost centers. Editing of forecasts. Edit allocated to spend. Re-initiate budget. Release of money.
Expenses	If the configuration setting is 'True' then the following operations are allowed: Add/delete of commitments. Add/delete of invoices. If the configuration setting is 'False' then the above operations are not allowed.
Scorecard	Set default metrics. Add/delete of measurements. Recalculate of KPI's.
Reviews	Add/Delete of reviews.
User Roles	Adding/Change of marketing owner. Add/Delete of coordinators. Add/Delete of budget manager. Add/Delete of readers.
Workflows	Add/ Delete of briefs. Add/ Delete of projects.
Versions	Delete of versions.

1.1.3. View Commitments

A view commitments screen is displayed with the following sections:

- **Search**: Here the user can search for commitments by giving information such as the vendors, commitment # (number), payment due date (from and to), status and the cost center then clicking on the '**Search**' button.
- **Commitments**: The commitments which are to be reviewed by the logged in user are displayed with details such as title, commitment# (number), vendor, due date, status, committed and the balance amounts.

  By clicking on the commitment title link the user is taken to the view commitment screen where the user can edit or close the commitment. The commitment items and the payment schedule can be viewed. The invoices can be added or the existing invoices can be deleted.

Batch reconciliation can be done.

1.1.4. View Invoices

A view invoices screen is displayed with the following sections:

Search: The user can search for invoices by giving information like the vendors, invoice # (number), payment due date (from and to), paid on date (from and to), invoice date, status and the cost center then clicking on the '**Search**' button.

Invoices: The invoices to be reconciled by the logged in user are displayed with details such as the title, invoice # (number), vendor, paid date, status, amount and the reconciled amount. By selecting multiple invoices batch reconciliation can be done.

By clicking on the invoice title link the user is taken to the view invoice screen where the user can edit or reconcile the invoice.

Reviews

The list of plans/programs/campaigns that have to be reviewed by the logged in user. By clicking on the plan/program/campaigns title link the user can view the detail of plan/program/campaign/activity and provide comments and upload documents.

Bulk Changes

To view the existing sandboxes click on the '**Bulk Changes**' on the left pane. The following users can access all the plans which are in the sandbox:

1. The Budget Delegate.
2. The initiator of the plan.
3. The users of the complete access group can access all the sandboxes along with their respective budget delegates.

As multiple users have access to the sandbox, it gets locked when a user is accessing the sandbox to avoid access by multiple users at the same time. It does not get unlocked unless the plan is released from the sandbox either by applying the changes to the plan, cancelling the changes or aborting the changes.

If the user locks a sandbox but does not unlock it, the admin, has the special access to unlock the sandbox.

To initiate the sandbox:

1.1.5. Budget and Forecast Re-allocation

Only the plan creator/complete access group user can go into the sandbox mode by going into the plan. On the view plan screen on the budgets tab click on the '**Edit Bottom Up**' button to do the bulk updates.

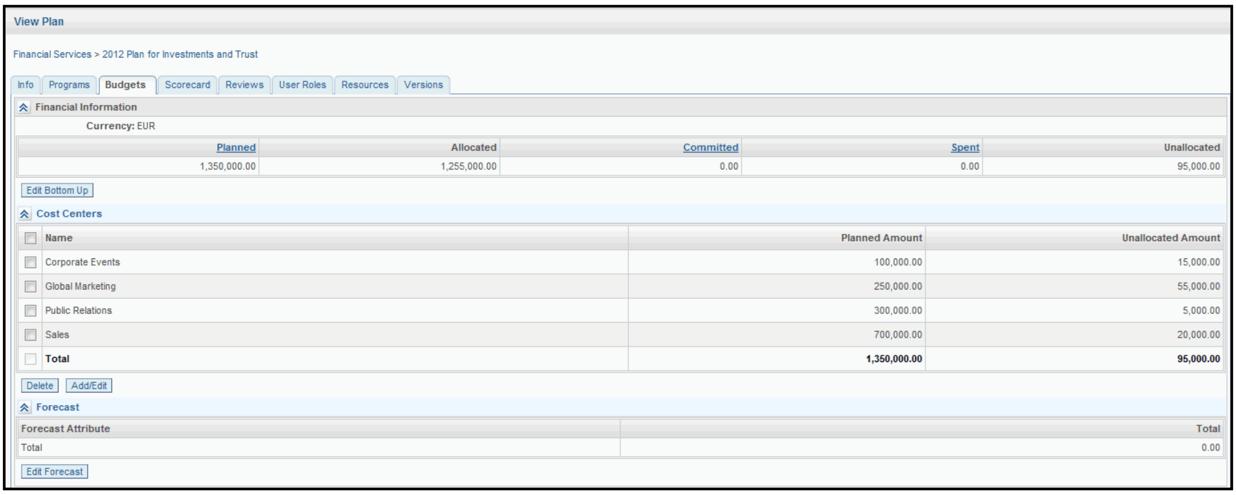


Figure No.41

The budget delegate needs to be selected **(Figure 42)**, if not selected then the plan creator/complete access group user is assumed to be the budget delegate. The user selected as the budget delegate will receive a notification. Once this is done the plan goes into the bulk changes mode and gets locked.

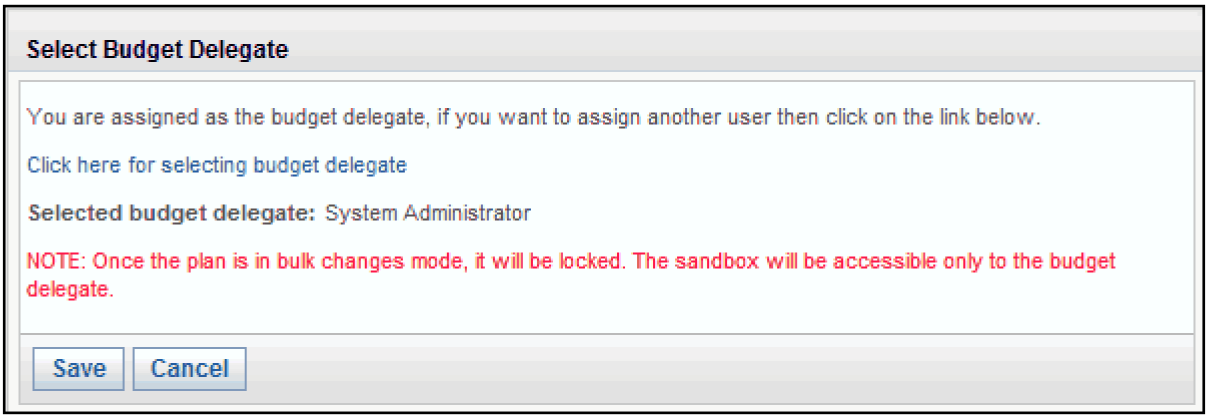


Figure No.42

There are two tabs on the '**View Plan – Bottom Up**' screen:

1. **Budget Re-Allocation**: The bulk changes for budget re-allocation can be performed without any budgeting constraints that are applicable in the regular mode of operation within a plan.

   Note: The cost centers which are available at the plan level only are available at the lower levels.

   The user can view the budgeting information such as the planned, allocated to spend, committed, spent, unspent and the unallocated amounts for a plan and all the programs/ campaigns/ activities under it and make changes to it within the sandbox.

   In the sandbox, budget reallocation changes can be applied in a 'batch' as an online process once the changes for the entire plan and all the programs/campaigns/ activities under it have been finalized.

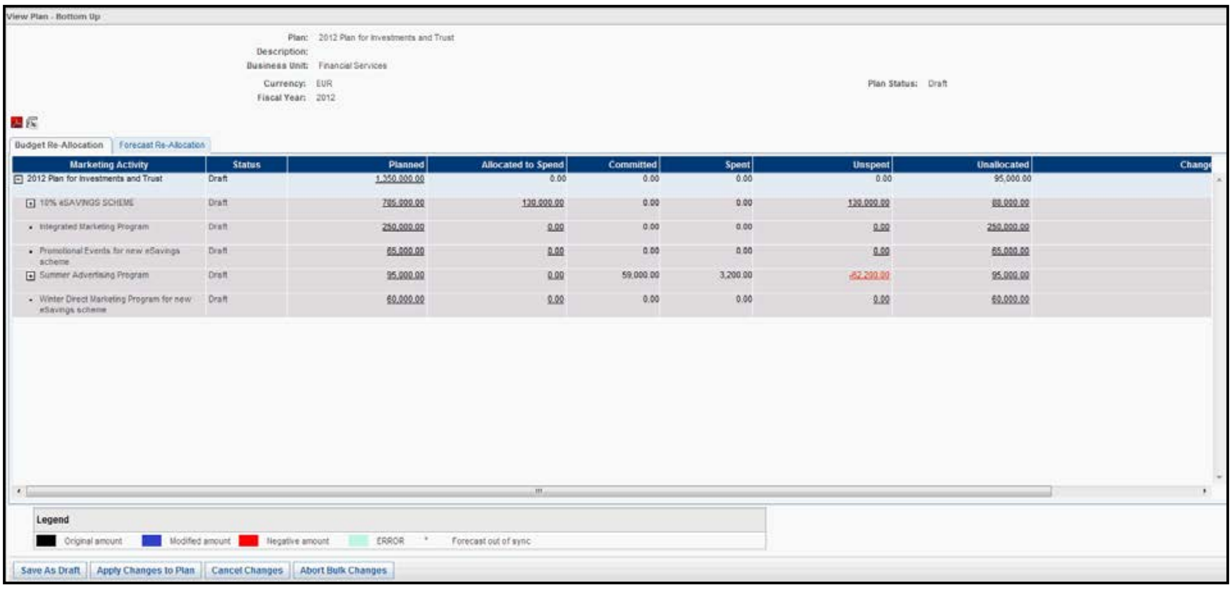


Figure No.43

2. **Forecast Re-Allocation**: The bulk changes for the forecast re-allocation can be performed without any constraints that are applicable in the regular mode of operation within a plan.
   Within the sandbox the user can view the budgeting information such as the planned and the forecasted amounts for a discipline per quarter/month/year/period in a plan and all the programs/campaigns/activities under it. **Adding disciplines:** Authorized users have the ability to add a discipline for a plan/program/campaign/activity in the sandbox for forecast re-allocation:
   - The user can add a discipline for a program/campaign/activity if it is already added at the parent level.
   - If the setting to allow the adding of disciplines at the plan level in the sandbox is set to true then at the plan level when the user is selecting a discipline from the list, all the forecasting disciplines configured in the system are shown. If the setting to add discipline at the plan level is set to false then user cannot add new disciplines at the plan level in the sandbox.
   - The user can select and add disciplines in the sandbox at the program/campaign/ activity level only if it is already added at the parent plan/program/campaign level.

   Deleting disciplines: Authorized users also have the ability to remove a discipline for a plan/program/ campaign/activity:
   - The user can remove a discipline from a plan/program/campaign/activity if it is not selected at lower levels.
   - If the user tries to remove a discipline from a plan/program/campaign which is selected at the lower levels then the user is shown an alert informing the user that the discipline cannot be deleted as it is selected in the lower level program/ campaign/activity.

   In the sandbox, forecast reallocation changes can be applied in a ‘batch’ as an online process once the changes for the entire plan and all the programs/ campaigns/activities under it have been finalized.

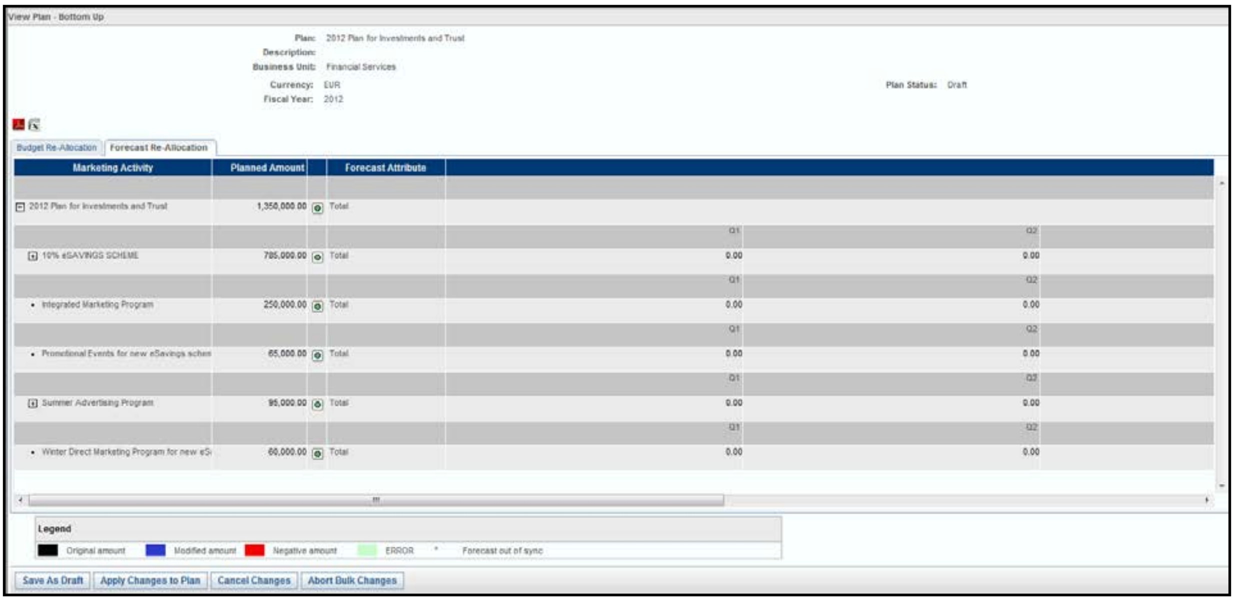


Figure No.44

On this screen details such as the plan title, description, business unit, currency, fiscal year, plan status and last updated on is displayed. The following operations can be done:

- **Save as Draft**: The sandbox is saved as a draft only.
- **Apply Changes to Plan**: The plan gets unlocked and the changes are applied to the plan.
- **Cancel Changes**: The changes get canceled.
- **Abort Bulk Changes**: The sandbox mode is aborted and the user is taken back to the plan screen.

Click on the underlined amounts to change them. Once the changes are made in the amounts a change log is entered next to the plan/activity/sub activity in the last column.

A single notification will be sent to the activity coordinators for the programs/campaigns/ activities informing them about the sandbox changes after they are applied to the actual plan and all the programs/campaigns/activities under it. There is a configuration setting which will determine if the system should send notification to the activity coordinators or not.

1.1.6. Multi-year Activities

If an Activity is to be continued beyond the current fiscal year and its commitments to be moved to the following year, then the user can split the Unspent Amount and the Commitment Amount so that it is allocated as Budgeted and Committed amount in the next fiscal year's activity. User defined amounts from the Unspent and Committed Amount of the Current Years Activity can be moved to the Activity continuing in the next Fiscal Year. In this case the Plan for the next Fiscal Year should already be created in the system and budget should be allocated to the Plan.

Bulk Changes for closing activities as well as continuing activities and commitments in the next fiscal year can be performed in the Sandbox.

On the Info tab click on the '**Multi Year Activities**' button to do the bulk changes **(Figure 45)**.

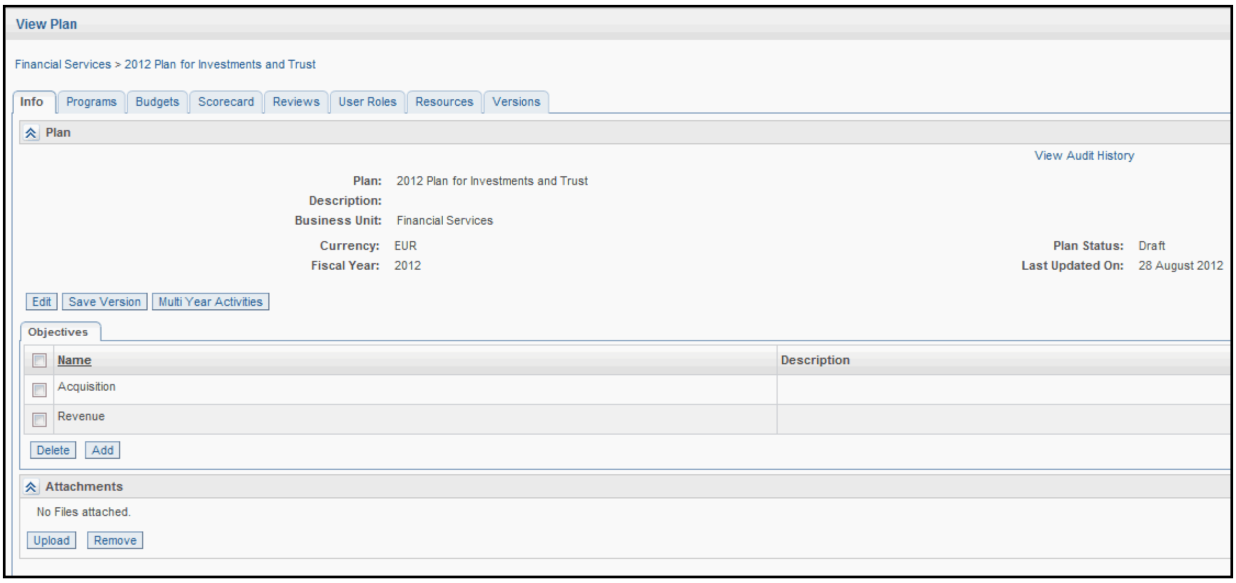


Figure No.45

The Budget Delegate needs to be selected **(Figure 42)**, if not selected then the plan creator/complete access group user s assumed to be the Budget Delegate. The user selected as the Budget Delegate will receive a notification. Once this is done the plan goes into the bulk changes mode and gets locked. The Sandbox can be created and accessed by the Budget Delegate.

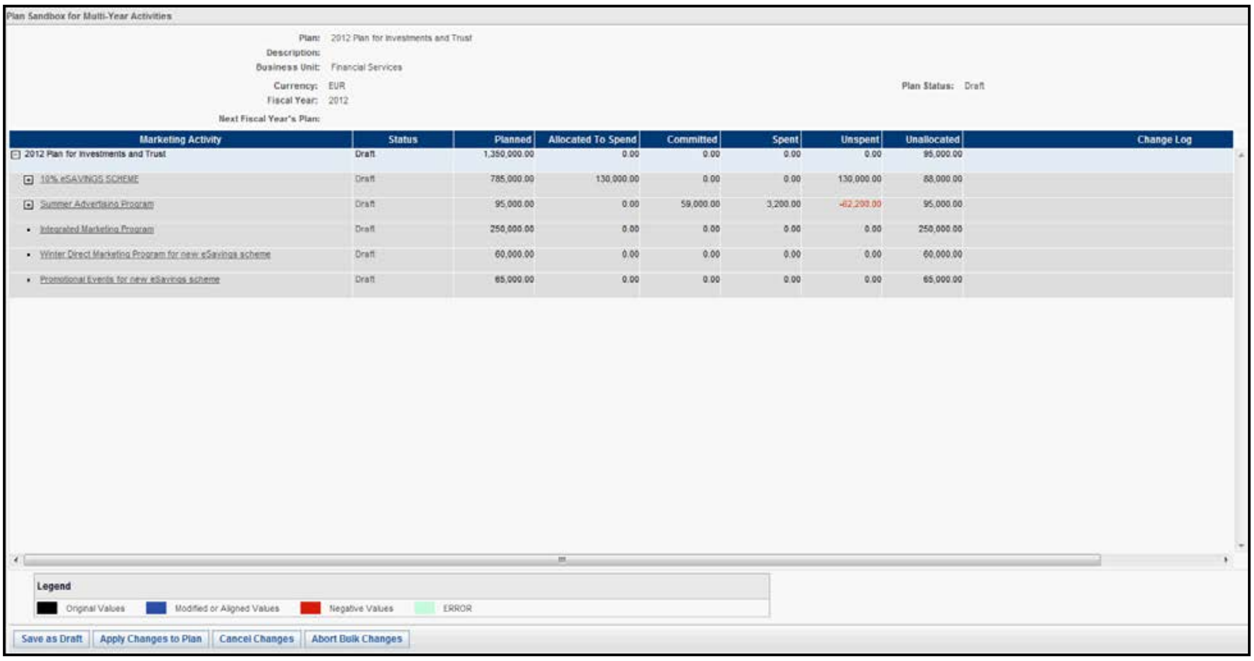


Figure No.46

A Plan's Sandbox for Multiyear Activities screen is displayed. Details such as the plan title, description, business unit, currency and fiscal year is displayed. While aligning an activity the Next Fiscal Year's Plan name is not displayed till the activity has been aligned.

Clicking on the marketing activity name link, an activity details screen is displayed where the user can go the commitments and add the payment schedule for the next fiscal year to split the commitment. Once the commitment is split the activity can be aligned and closed **(Figure 47)**.

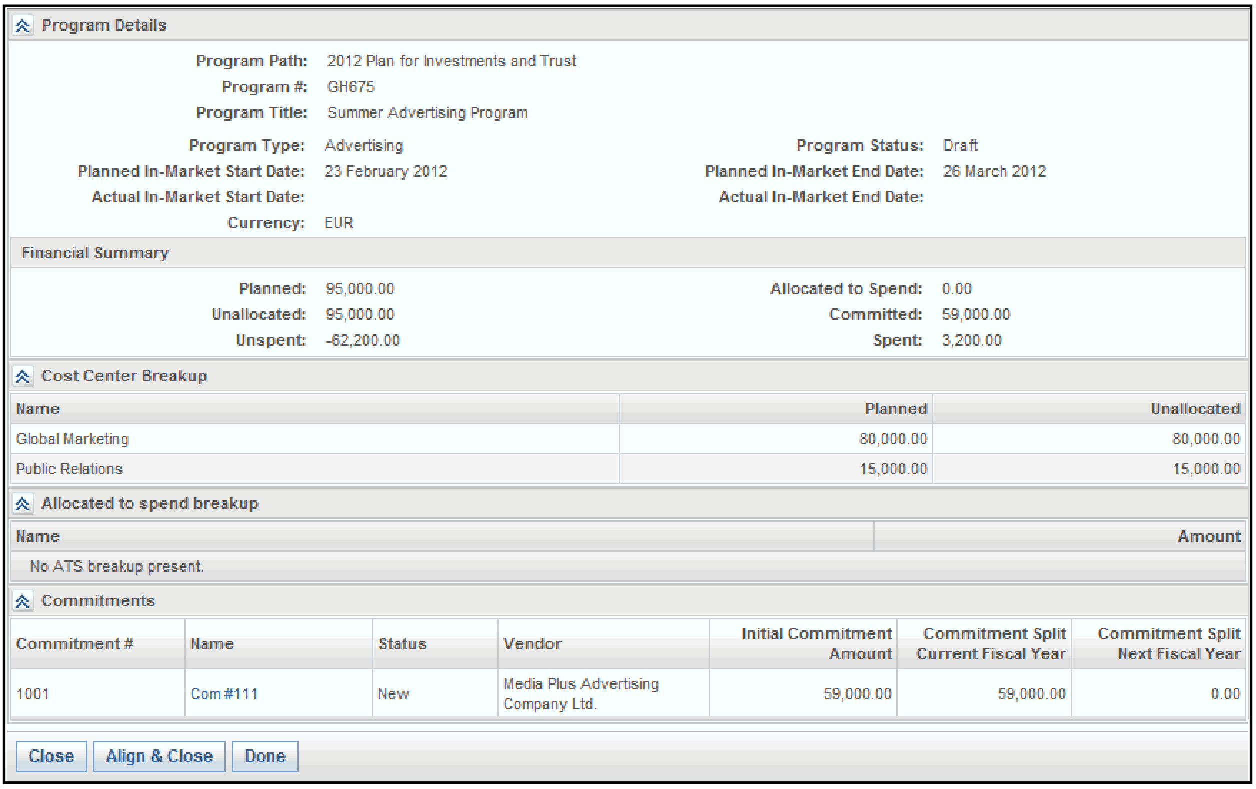


Figure No.47

The following operations can be done on this screen:

- **Close** – Closes the activity for the current fiscal year without aligning for the next fiscal year.
- **Align & Close** – To align the activity to the next fiscal year and close the activity for the current fiscal year.
- **Done** – Takes the user back to the previous screen.

Click on the Commitments name link to split the commitment. A Commitment details screen **(Figure 48)** is displayed where payment schedule(s) for the next fiscal year can be added. Save the changes made by clicking on the '**Save**' button.

Note: If any payment schedule is added for the next fiscal year then ensure that the activity is aligned.

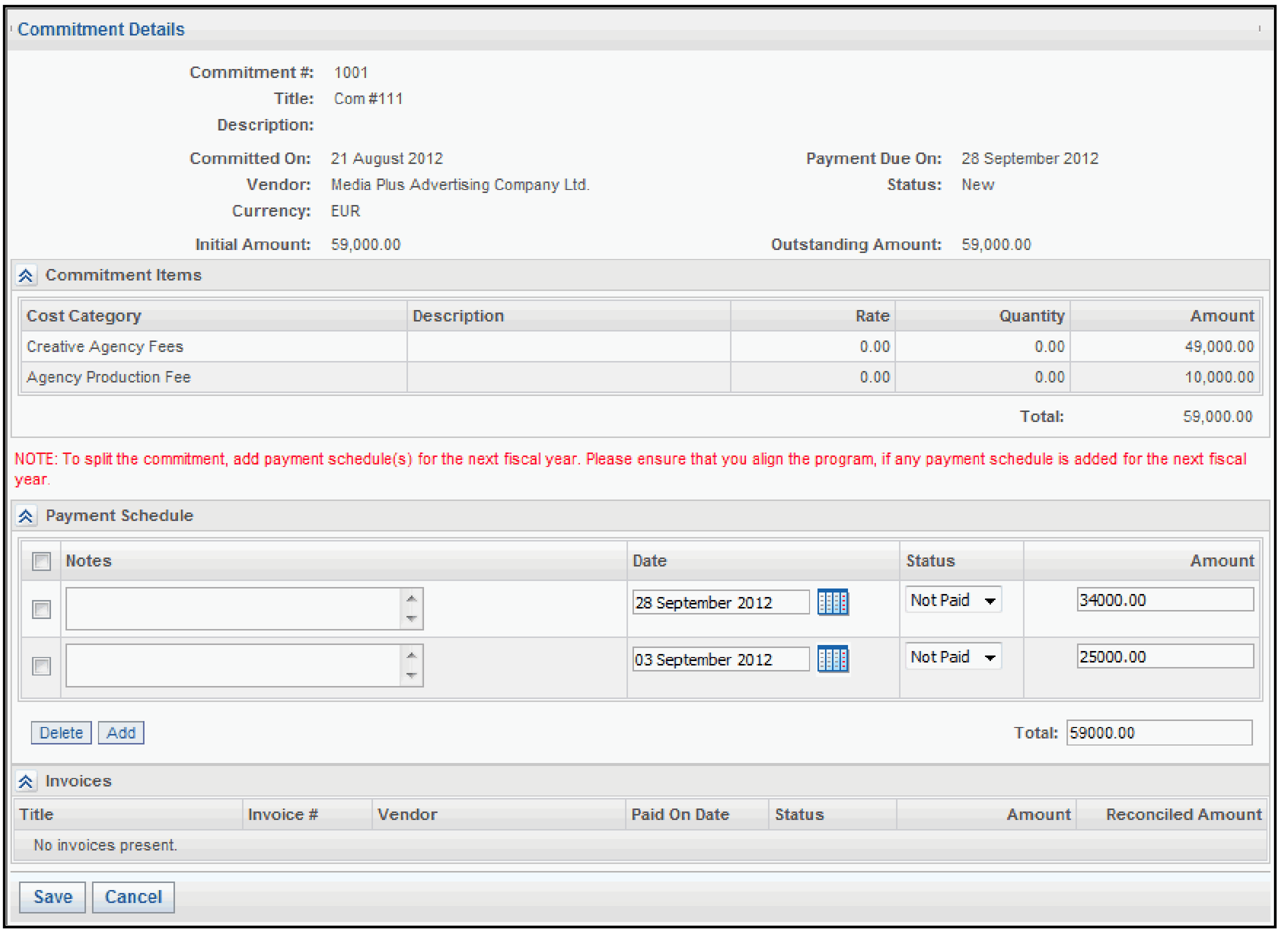


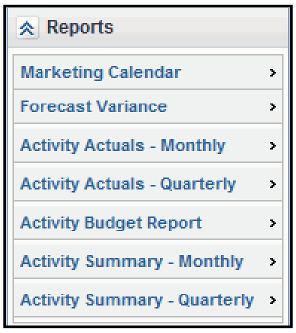
Figure No.48

To apply the changes to the plan click on the '**Apply Changes to Plan**' button **(Figure 46)**. The changes are applied and the plan gets unlocked.

The users having access to the sandbox can navigate into the sandbox and generate reports for 'Budget Reallocation' and 'Forecast Reallocation'.

Embedded Reports

There are 5 embedded reports in Strategic Planner. They can be generated from the Strategic Planner screen and are available for each level of the plan. On the left pane the links to the reports are displayed:



	Marketing Calendar: The marketing calendar report can be generated to view the complete Gantt chart. The calendar for the plan as well all its activities is shown. When generated at any level of activity, it shows the calendar from that level of activity and the levels below it. This shows the calendar for both the Planned and Actual dates for the activities also for activities having different activity types, there are colors displayed to differentiate these. This marketing calendar report is only a yearly report. While generating this report a user selected activity can be excluded from the report.
	Forecast Variance: This link can be seen only if the 'Forecasting Required' option is set to True. The users having read/write access to the plan can generate the report. The forecast amounts for the months in each quarter are added to show the forecast amounts for each quarter. The actuals per quarter and the variance between the forecasts and the actuals are displayed. In case the actuals exceed the forecast amount the amount is displayed in red and if the actuals are less than or equal to the forecast amount, it is displayed in green.
	Activity Actuals – Monthly/Quarterly: This report is generated at all levels within the plan. This report displays the rollup amounts at each level for allocated to spend, committed and spends per quarter/month, total spend, available and unspent. The invoice paid date is considered for the quarter/month calculation. There is a facility to export the report to Excel and PDF.
	Activity Budget Report: This report displays the planned and unallocated amounts at that level and the rollup amounts at each level for the allocated to spend, committed, total spend and available. This report is an equivalent of the activity budgets and spends report in the Strategic Planner reports category.
	Activity Summary – Monthly/Quarterly: This report displays the same information as the activity actuals report but is generated only for the plan and program Level. This report is an equivalent of the activity actuals report in the Strategic Planner Reports category.

Strategic Planner Reports

In order to maintain the confidentiality of the reports, the business unit filter is mandatory, wherever it appears as a filter. If 'ALL' is selected in any filter, it denotes the values for the user. For e.g. if 'ALL' is selected for the business unit filter, then only the business units to which the user belongs to will be considered and not all business units of the system.

Strategic Planner reports display a list of configured reports. To launch the reports click on '**Reports**' link on the left pane of the dashboard under MOM. By default the Startegic Planner reports will be displayed **(Figure 49)**. Any reports which are scheduled by the logged in user will be displayed **(Figure 48)** in the top part of the screen with the following details:

- **Name and Description**: The name and description of the report.
- **Run cycle**: How many times the report needs to be generated.
- **Next Run Time**: If the report is generated multiple times then when it is going to be generated next.
- **Last Run Time**: If the report is generated multiple times then when it was generated last.
- **Status**: Whether the report was generated and sent successfully or if there were any errors. If there were errors then it can be resubmitted by making changes in the schedule for the reports. The errors can be viewed by clicking on the '**ERROR**' link.

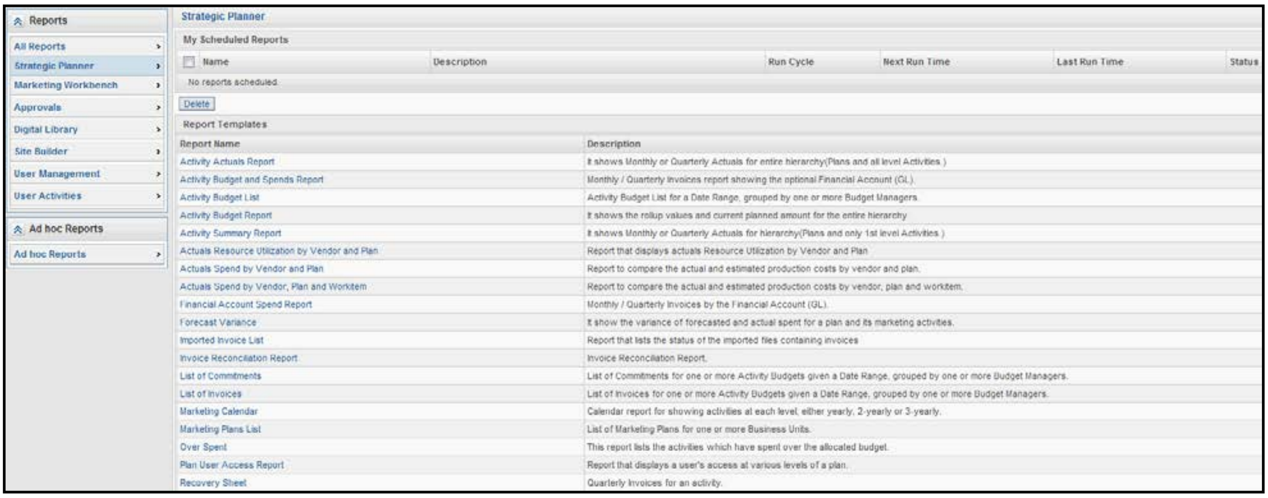


Figure No.49

The following reports can be scheduled in Strategic Planner:

In Strategic Planner – Overspent Report, Activity Budgets and Spends Reports.

Note: To schedule a report see <u>Section 11</u> for more details.

The following reports can be generated in Strategic Planner:

- Activity Actuals Report
- Activity Budget and Spends Report
- Activity Budget List
- Activity Budget Report
- Activity Summary Report
- Actuals Resource Utilization by Vendor and Plan Workitem
- Actuals Spend by Vendor and Plan
- Actuals Spend by Vendor, Plan and Workitem
- Financial Account Spend Report
- Forecast Variance Report
- Imported Invoice List
- Invoice Reconciliation Report

- List of Commitments
- List of Invoices
- Marketing Calendar
- Marketing Plans List
- Over Spent
- Plan User access Report
- Recovery Sheet

Once the reports are generated the user can export the reports in PDF or Excel.

Offer Management

Announcing Offer Management as a solution in SAS Marketing Operations Management that allows marketing organizations to create and manage Marketing Offers. These offers can be published via Offer Calendars and including while planning Campaigns and Activities in Strategic Planner.

Key Benefits:

1. Allows central management and tracking of Marketing Offers
2. Allows marketing organization to publish the offers via an Offer Calendars

User Roles:

- **Creator** – User who creates the Offer.
- **Owner** - A user can be selected as an Owner. By Default, the creator will be set as owner.
- **Author -** List of Users / groups who will have edit access on the Offer.
- **Reader** - List of Users / groups who will get only a read access on the Offer.
- **Offer Managers (group) -** This role will be used to send emails when offers are changed. Only Members of this group will have access to lock or unlock offers. Members of this group will have edit access on all the offers.

Creating Offers

After signing in click on the '**Offer Management**' link on the left pane to launch the solution. The following screen is displayed by default **(Figure 1)**.

A list of recently updated offers are displayed **(Figure 1)** with details such as offer name, folder path, offer code, offer type, offer valid from and till dates, status, locked and last updated on. Offers can be searched for by providing filters such as offer name, offer code, offer valid from and till dates and the status of the offer (draft, published, in-market and expired).

The offers can be edited by clicking on the offer name link.

Folders need to be created for storing the offers. By clicking on the '**Menu**' link on the left pane the following options are available **(Figure 1)**:

- **Create**: Click on this option to create a new folder.
- **Rename**: Click on this option to rename the selected folder.
- **Delete**: Click on this option to delete the selected folder.

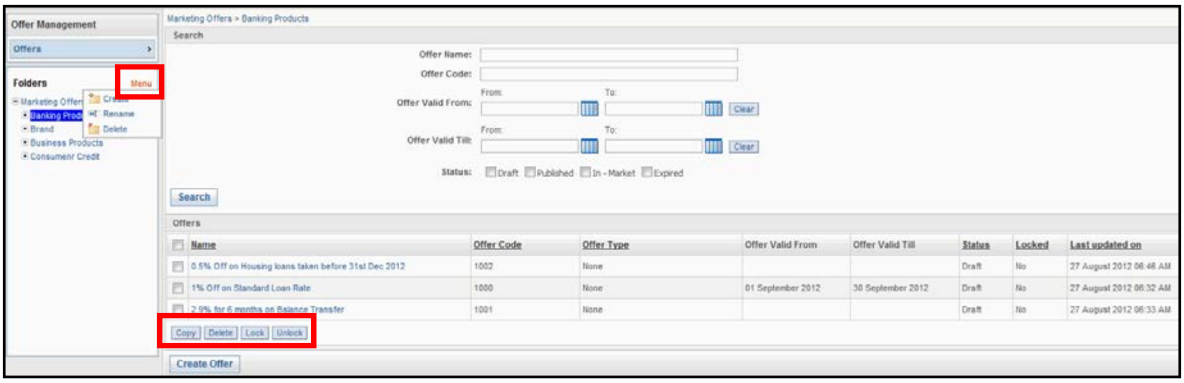


Figure No.1

The following operations can be performed on the offers screen **(Figure 1)**:

- **Copy** – A copy can be made of a selected offer. A user with edit access can make a copy of an offer. When the user selects multiple offers and clicks on the '**Copy**' button, the system will create the offers with 'Copy of' string appended to the name. A popup will be displayed where the user will be able to change the names of the offers. During the copy operation, for each offer, an audit record will be maintained. This will track the user who is copying and the date and time when the offer was copied. All the facets, roles, attachments will be copied. Notification will be sent to the Authors and Readers when the copy is created.
- **Delete** – A selected offer can be deleted.
- **Lock** – A selected offer can be locked in case it is being edited. An offer can be locked by the members of the Offer Managers group only. Once the offer is locked, users will be able to see the offer details in a read only screen.
- **Unlock** – A locked offer can be unlocked.

  Note: A configured group (Offer Managers), offer creator, authors and readers will be notified every time an offer is created, copied, edited, locked or deleted.

  Select the folder in which the offer needs to be stored in and click on the '**Create Offer**' button. An offer details screen is displayed **(Figure 2)** where details such as offer name, description, offer code (could be auto generated depending on the setting), offer type, valid from and till dates and any supporting documents can be uploaded.

Figure No.2

Click on the '**Save & Continue**' button **(Figure 2)**. An offers details screen is displayed where the details filled in by the user can be edited or published.

In the user roles section **(Figure 3)**, roles such as offer owner, authors and readers can be assigned to different users.

The owners and authors have a right access and they can edit the offer details whereas the reader has only read access on the offer.

Once all the information has been provided the offer can be published by clicking on the '**Publish**' button **(Figure 3)**.

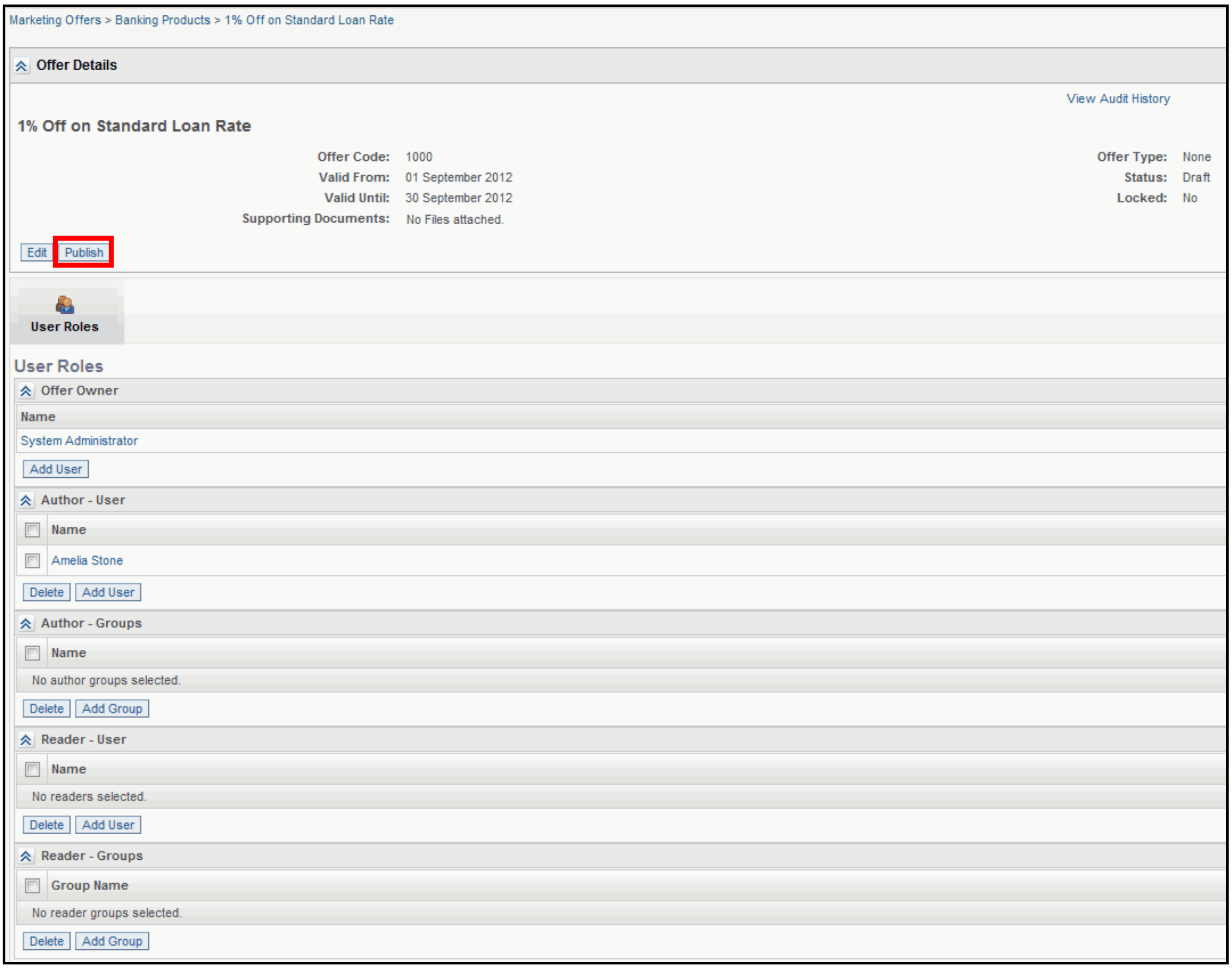


Figure No.3

Offers will have the following status values:

- **Draft** – The offer will be in draft mode if the creator has just saved the offer and not published it.
- **Published –** When the status is published, then only the offer can be selected in Strategic Planner. If the offer has any other status, then it cannot be selected.
- **In–Market –** There will be a back end process which will run every day. This process will check if the start date of the offer is less than or equal to today's date. If yes, then the status of the offer will be changed to "In-Market". In Market offers will be read only.
- **Expired -** If the End date for an offer is less that today's date then the status will be changed to Expired.

Offers in Strategic Planner

From the second level onwards i.e. Program level the offers created in Offer Management can be selected for a particular activity in Strategic Planner. In the 'Info' tab of an Activity there is an 'Offers' tab where offers can be added by clicking on the '**Add**' button.

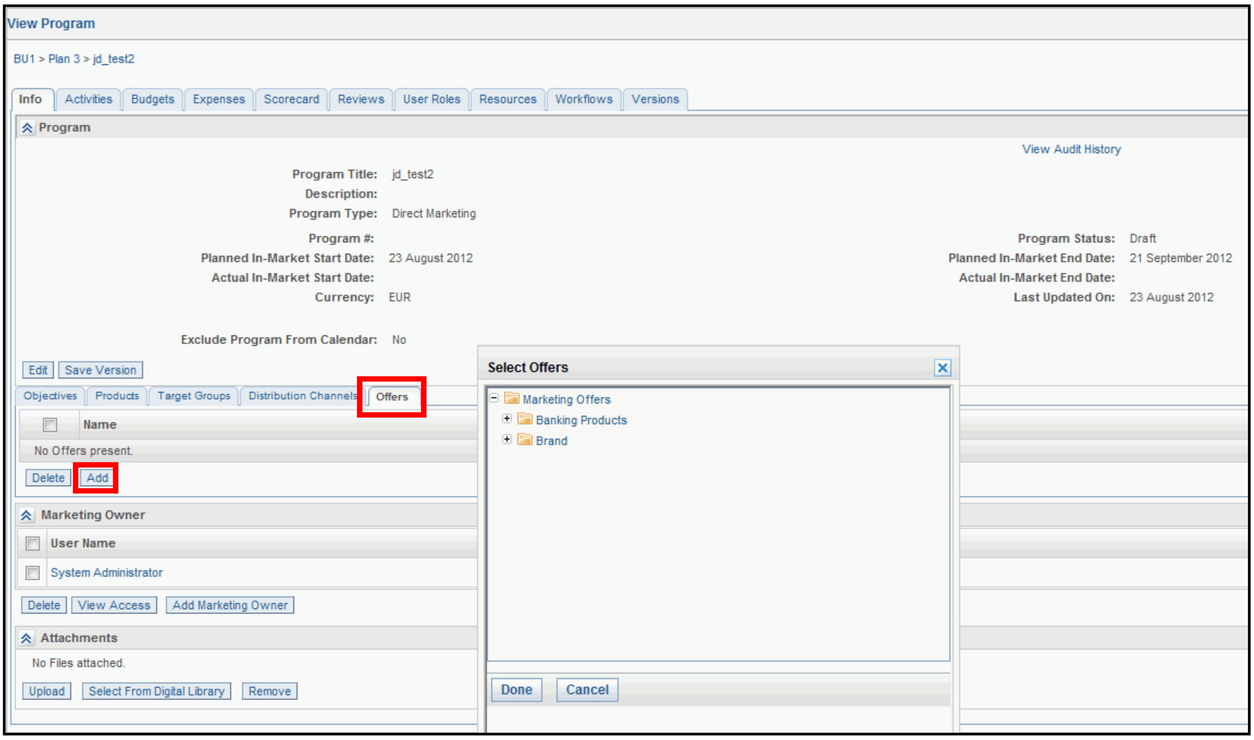


Figure No.4

Offer Calendars

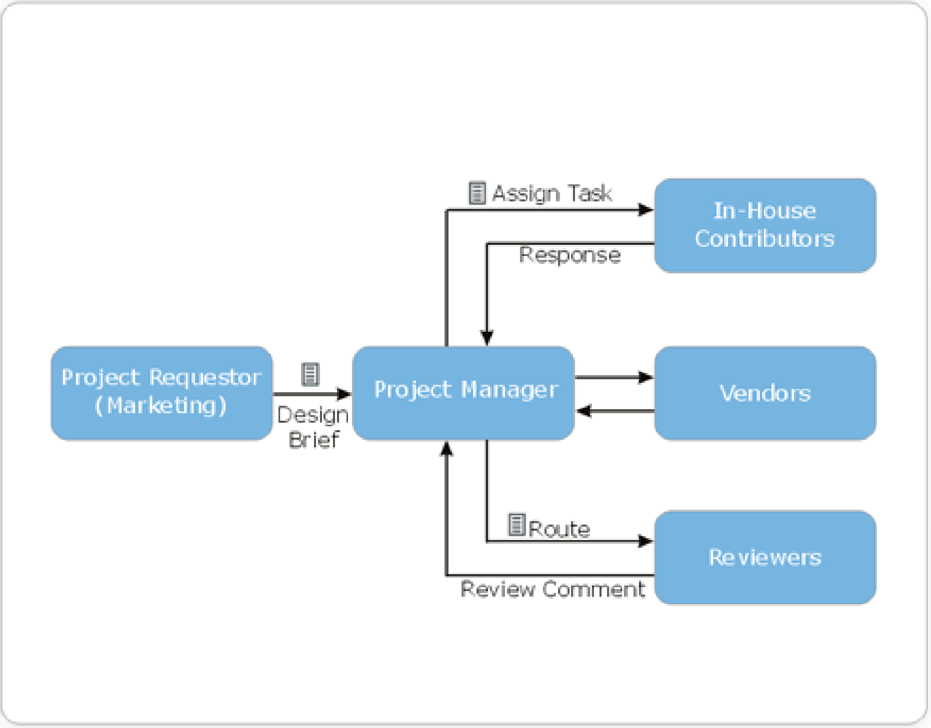
The offers made for one or more marketing activities will be displayed on the Offers Calendars. The Offer Managers group is allowed to access all offers from the offers calendar.

Figure No.5

Marketing Workbench

Overview

Marketing workbench brings discipline and consistency to the various marketing workflow processes running in an organization. The application implements workflow, related to the submission of project requirements, assignment of projects, development of layouts and artworks, allocation of various tasks required for completion of the project and reminders for delivery of assigned tasks.



Glossary of Terms used

Brief - A brief is a written explanation given to a project manager outlining the goals and objectives of a campaign/activity. A detailed brief is a critical part of the planning and workflow process. It helps to establish an understanding between the brief initiator and the project manager ultimately serving as an essential reference tool to start and execute the project.

Brief Types - The briefs can be classified in the system into brief types. E.g. a packaging brief for a packaging activity or a promotions brief for a promotions campaign.

Project - A project is a planned program of work for execution of a campaign/activity. It may require several deliverables, tasks and steps for its completion. Each of the tasks and deliverables may be assigned to one or more persons.

Project Types - The projects can be classified in the system into project types. E.g. a packaging project or a promotions project.

Deliverable - A deliverable is a tangible piece of work that is part of a project, often contractually identified both in time and content. A project may have several deliverables.

Deliverable Types - The deliverables can be classified in the system into deliverable types such as a packaging deliverable or a promotions deliverable depending on the project type.

Task – A task is a piece of work that a user is given to do, usually short in duration or with a deadline. A deliverable may require several tasks to be done for it to be delivered. A task may contain multiple steps for its execution.

Task Types - The tasks can be classified in the system into task types such as assignment, discussion, gather information, routing, tracking task etc. depending on the type of project and the steps required for its execution.

Review - A review is a process conducted to invite comments from different key personnel in the organization on different aspects of a certain issue. E.g. the brief is sent for review before it is translated into a project for execution. A deliverable such as an artwork that is received needs to be reviewed before it is approved for use.

User Roles

Project Managers - In charge of project execution.

Acting Project Manager – The project manager assigns the acting project manager.

Deliverable Manager – Is responsible for the deliverable and has the authority to add, delete, modify, submit and cancel tasks.

Readers - Stakeholders who get access to view the briefs/projects/tasks.

Reviewers - Stakeholders who review the briefs/requests/tasks and give their comments.

Contributors - Personnel who are assigned tasks for execution.

Task Initiator – The user who initiates the task.

Marketing Workbench Process

In general the marketing workbench process is as follows:

The project requestor creates a brief and sends it to the project manager. The project manager creates a project from the brief and then assigns tasks to the various contributors and vendors.

The contributors respond to these tasks with comments, documents, files etc. that is sent back to the task initiator.

The project manager can route the documents/files sent by the contributors among the reviewers.

The reviewers in turn give their comments and approval in response.

Operation Modes

Request Mode - In this mode the user (like product/marketing managers) can initiate new briefs, view inactive briefs and delete the existing briefs.

Manage Mode - In this mode, the user (like project manager, acting project manager) can create new projects, view inactive projects, if required delete the existing projects and view pending briefs. The user can also create deliverables for a project and define the creation/submission of tasks for a deliverable.

Perform Mode – The users (like contributors/ reviewers, pre-press/separators, legal/regulatory and designers) can view the active task list, inactive task list and briefs to be reviewed in this mode.

Getting Started

After signing in click on the ‘**Marketing Workbench**’ link on the left pane to launch the solution. The following screen is displayed **(Figure 1)**:

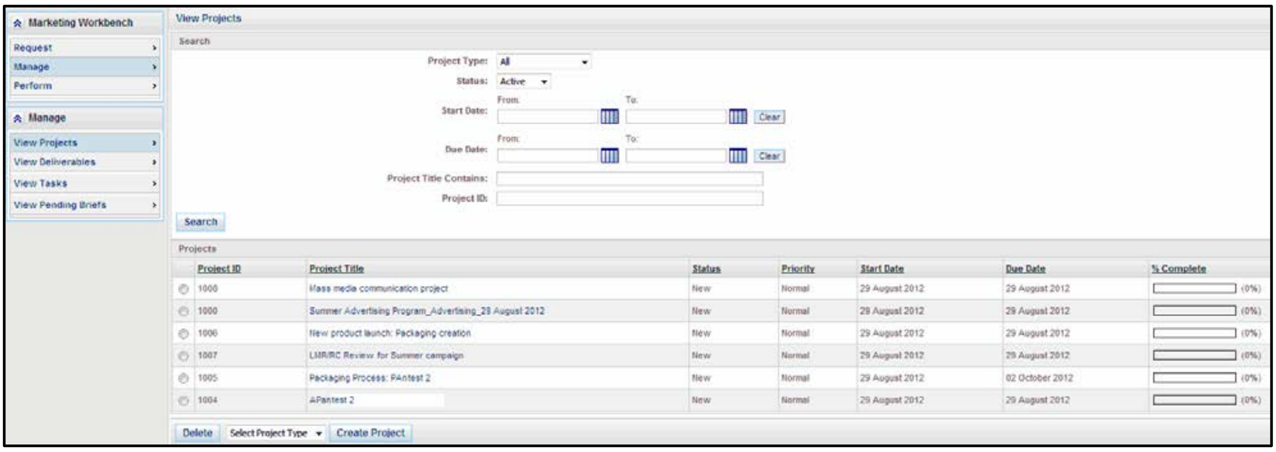


Figure No.1

Left Pane - It has applications related to marketing workbench. The links are request, manage and perform. By default, the application launches in the manage mode and there are four additional links on the left pane to view projects, view deliverables, view tasks and view pending briefs.

Content Frame - It displays a list of existing projects under the projects section **(Figure 1).**

Request

This mode is used to search existing briefs, initiate new briefs and delete an existing brief if required. Click on the ‘**Request**’ link on the left pane (Marketing Workbench). A screen with the following sections is displayed:

Search – The user may search for a particular brief by giving details such as brief type, status, start and due date of the brief and brief title contains (a keyword). Then click on the ‘**Search**’ button.

Briefs – The searched briefs are displayed here with details such as brief ID (if configured), title, status, start date, due date and project title. To view details of a particular brief click on the title link of the brief **(Figure 2)**. If a brief has been initiated from a strategic planner activity then while viewing the brief a link is provided to view the marketing activity.

Click on the ‘**Delete**’ button to delete the selected brief. Based on the configuration, which can be set by the system administrator the user can either delete briefs with any status or can delete briefs, which are in the new/draft state.

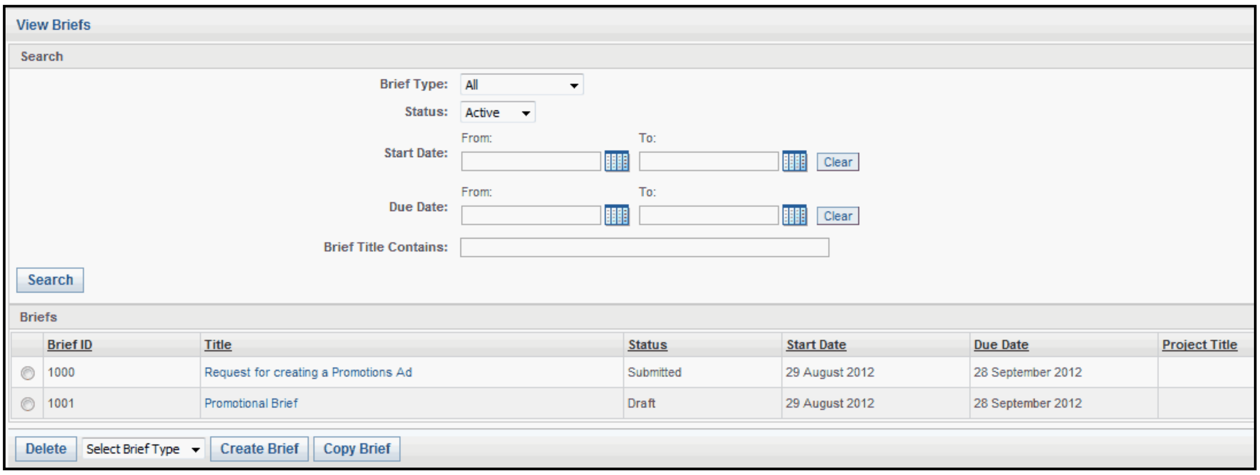


Figure No.2

Creating Briefs

To create a new brief, select a brief type from the pre-defined list and click on the '**Create Brief**' button on the brief list screen. It displays a tabbed view of the brief creation screen **(Figure 3)** having the following tabs:

Info: Has the following sections:

- **Brief** – The brief ID is displayed (auto populated, configured using Object ID series). Enter details such as the brief title, description, due date, project manager (if configured then can select only from the restricted group) and the project type. The brief initiator is displayed and by clicking on the link the brief initiator's details can be viewed. If a facet has been associated with the brief then the fields in the facet are also displayed here.
  A section is displayed where the facet fields are displayed. The facet is selected in process designer while configuring the brief types and is associated with the brief.
- **Deliverables for Brief** – Select the deliverable type from the drop down list and click on the '**Add Deliverable**' button. The brief needs to be saved while adding the deliverable. Component also can be added.
- **Attachments** – Upload attachments by clicking on the '**Upload**' button. A brief attachments screen is displayed where the user can select the necessary file by browsing to upload and provide some description (optional) for the attached file then click on the '**OK**' button. The user can select attachments from the digital library by clicking on the '**Select From Digital Library**' button.
- **Template Documents** – In this section the brief template is displayed which can be downloaded and filled by the user for any additional information for the brief and can be attached in the attachment section. This is available only if has been enabled by the administrator.

Click on the '**Save**' button to save the brief as a draft to be modified later for submission or '**Save and Close**' to save and close the screen and go back to the view briefs screen or the '**Submit**' button to submit the brief to a project manager. By clicking on the '**Cancel**' button the operation is cancelled.

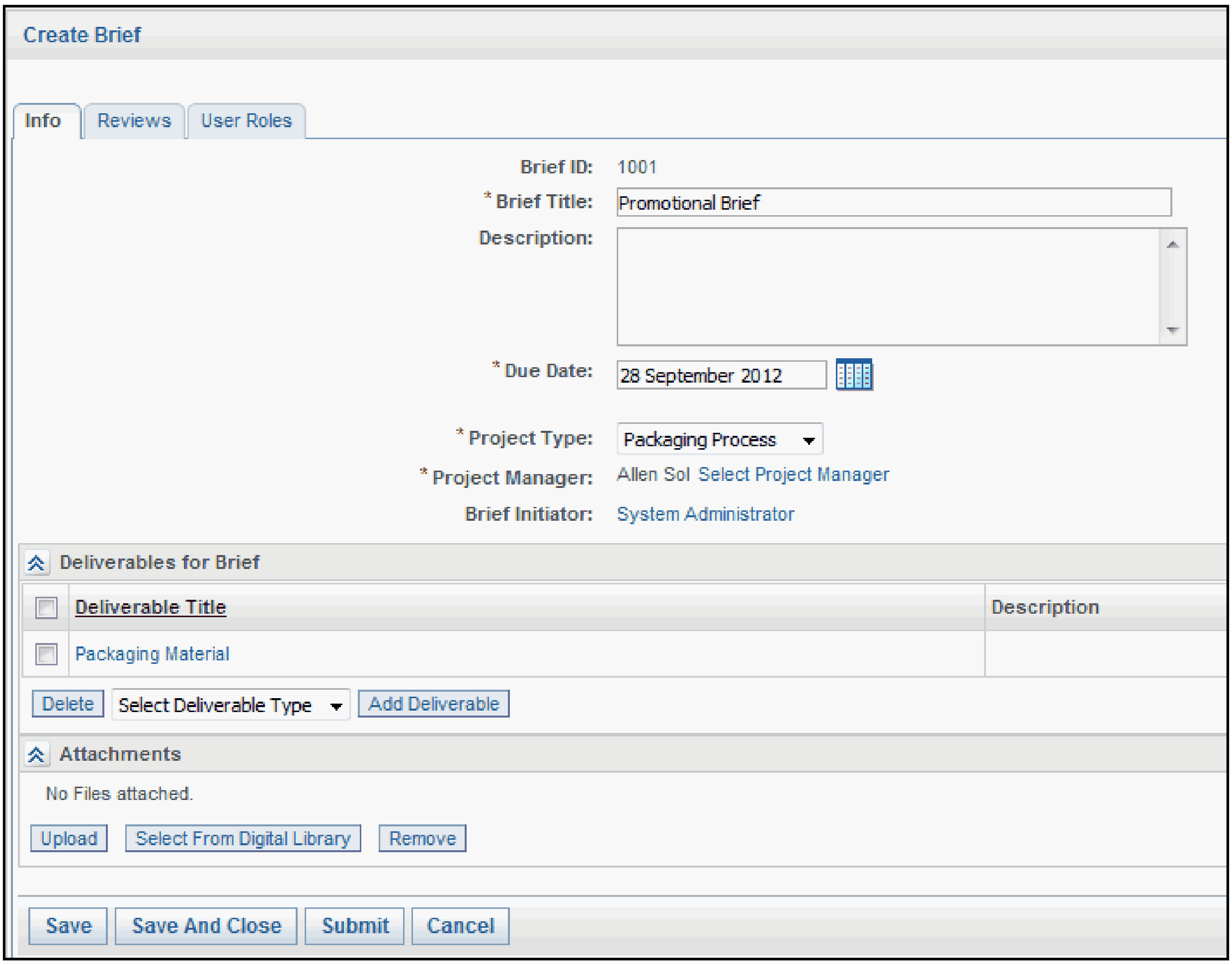


Figure No.3

Reviews: Reviews can be initiated by clicking on the '**Initiate Review**' button. A review details screen is displayed where the review title, review instructions and the end date for review can be entered and the reviewers can be added **(Figure 4)**.

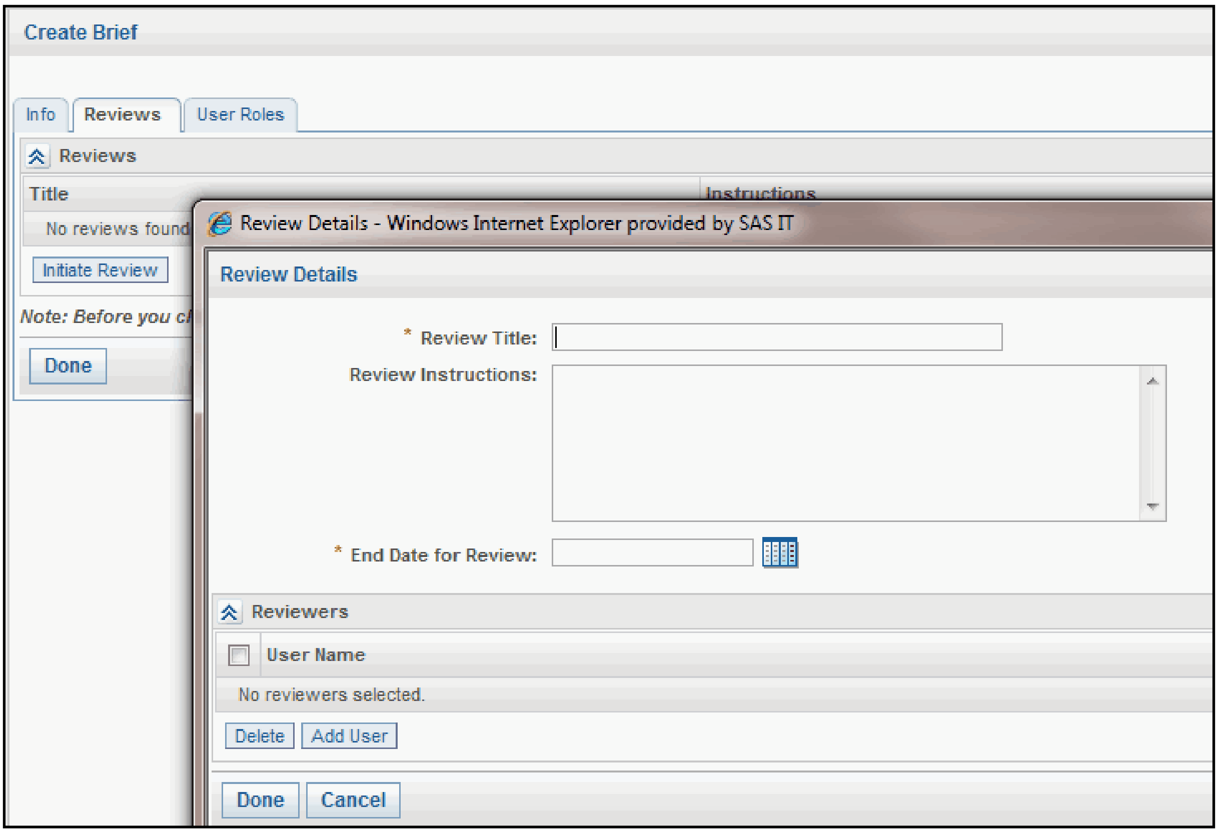


Figure No.4

User Roles: Select the readers by clicking on the '**Add User**'/'**Add Group**' buttons.

Copying Briefs

Select a brief and click on the '**Copy Brief**' button **(Figure 2)**. The copied brief will be opened in an editable mode. The start date will be the current date. The project manager and the assistant project manager need to be selected as they do not get copied. In this mode the brief can be printed.

Submitting a Brief

When the user clicks on the '**Submit**' button the brief is submitted to the project manager. If the brief is submitted for execution to the selected project manager the brief initiator cannot modify it. The system sends an email notification to the selected project manager indicating that a new brief has been assigned. The project manager can view the pending briefs by clicking on the '**View Pending Briefs**' link in the manage mode.

Managing Projects

This is the default mode. This mode is used to create and modify projects and view pending briefs.

Click on the '**Manage**' link on the left menu (Marketing Workbench). A screen with the following sections is displayed **(Figure 5)**:

Search – The user may search for a particular project by giving details such as Project ID, Project Type, status, start or due date of the project and the Project Title Contains (a keyword). Then click on the '**Search**' button.

Projects – The searched projects are displayed here with details such as project ID (if configured) project title, status, priority, start date, due date and %complete. Click on the project title link to view the details of a particular project. If a project has been initiated from a strategic planner activity then while viewing the project a link is provided to view the marketing activity. Activity path is displayed in the list based on the configuration setting done in Workbench Admin.

To delete the selected projects click on the '**Delete**' button. Based on the configuration which can be set by the system administrator the user can either delete projects with any status or just can delete projects which are in the new/draft state.

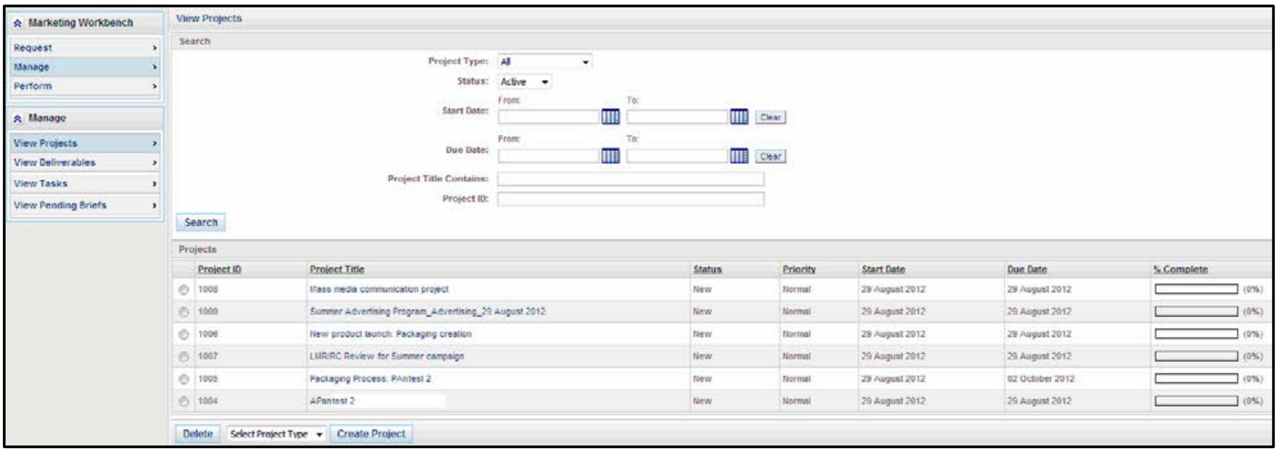


Figure No.5

Creating New Projects

There are two ways of creating a new project:

1. On the view projects screen select a project type from the pre-defined list and click on the '**Create Project**' button. It displays a create project screen **(Figure 6)** where the project ID is auto generated. The user can enter details such as:
   - **Project Title** – The title for the project.
   - **Description** – The description for the project.
   - **Project Manager** – The project manager for the project is the logged-in user and is displayed in read-only format here.
   - **Acting Project Manager** – The project manager can select an acting project manager by clicking on the 'S**elect Acting Project Manager**' link. A user selection screen is displayed and the acting project manager can be selected from an existing list of users.
   - **Start Date** – Select the start date of the project by clicking on the calendar.
   - **Status** - The status is displayed as new in a read-only format here.
   - **Priority** – The user can select the priority for the project as high, normal or low. The default is 'Normal'.
   - **Attachments** – The user can upload attachments for the project. The attachments could be any file(s) from the user's desktop or any asset(s) from the digital library can be attached to the project for reference.

   If a facet has been associated with the brief type then the fields in the facet can be viewed here.

   Save the project by clicking on the '**Save**' button or cancel the operation by clicking on the '**Cancel**' button.

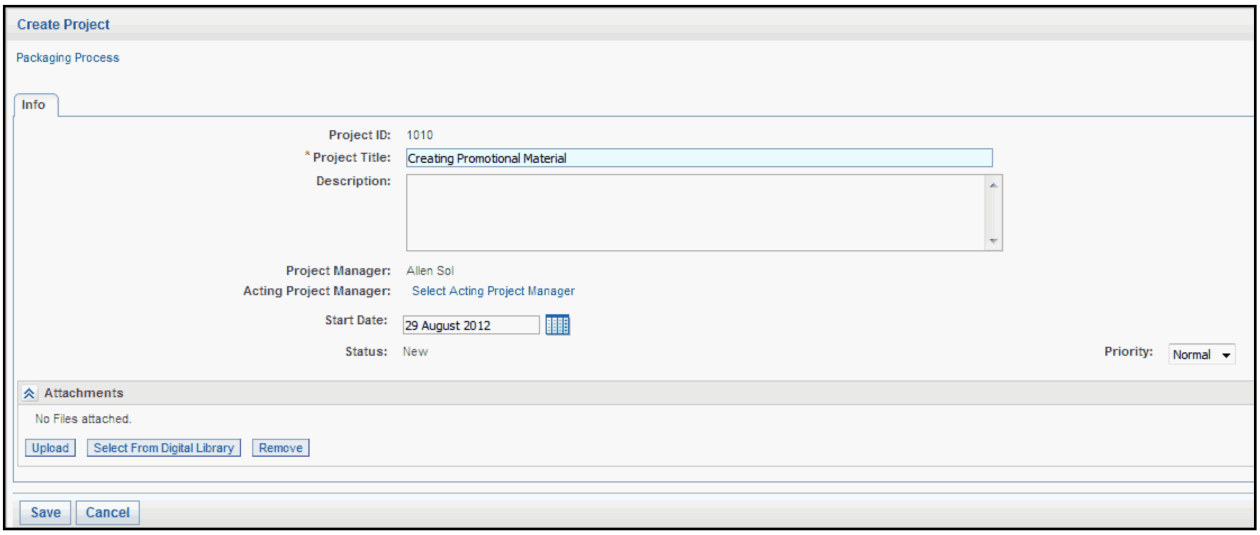


Figure No.6

2. By clicking on the '**View Pending Briefs**' link on the left pane, a view pending briefs screen is displayed with a list of briefs assigned to the user. Each row in the list displays details such as the bried ID, brief title, start and due date and status. Each brief title has a link, which when clicked on displays a view brief screen. Details such as the brief title, description, due date, status, project manager and the project type are displayed. The user roles, deliverables for the brief, reviews and the attachments are also displayed. The user can perform the following operations on this screen **(Figure 7)**:
   - **Create Project** – The user can create a new project by clicking on this button. A create project screen is displayed and the user can enter the details mentioned in the above section and save the project **(Figure 6)**.
   - **Assign to Project** – Clicking on this button displays a list of projects which are the same project type as the one selected in the brief, for which the logged in user is a project manager or acting project manager. Select a project to which this brief can be assigned and click on the '**Done**' button.
   - **Reject** – The brief can be rejected by clicking on this button and the reason for the rejection can be given.
   - **Print Brief** – The brief can be printed.
   - **Done** – The user is taken back to the view project screen.

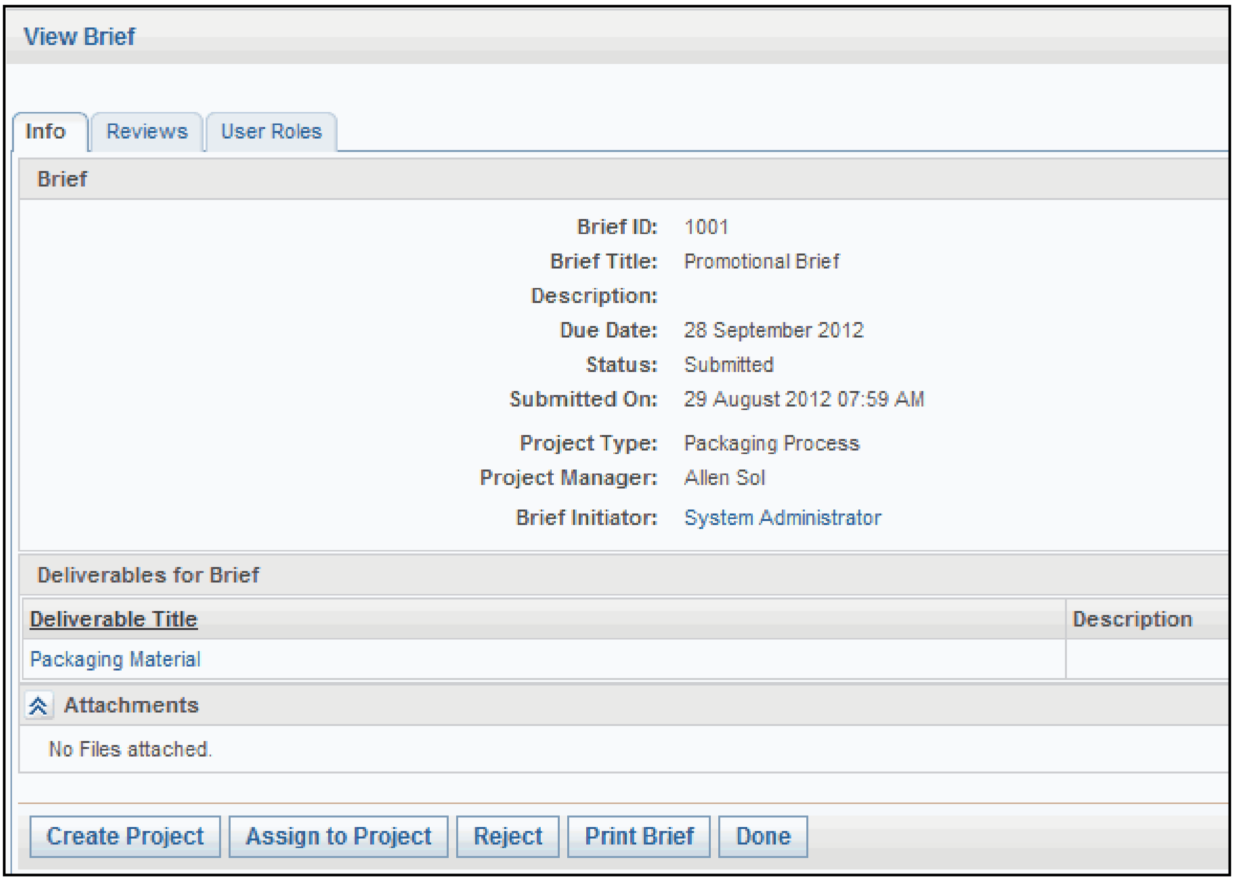


Figure No.7

Viewing the Project Information

When the user creates and saves a project a view project screen is displayed where the project information is displayed in a tabbed layout. The project detail screen has three tabs as follows:

- **Info** - The information related to the project is displayed with details such as the project ID, project title, description, % complete, start and due date, status and priority is displayed here. The project details can be edited by clicking on the '**Edit Project**' button.
  The brief related to this project with all the details will be displayed.
  The attachments if any are displayed here. If the attachments are references from the Digital Library then the '**Download Original**', '**Download Preview**' and '**Asset Information**' links are present for the asset else only the '**Download**' link is present. The user can add new attachments either from the desktop or from the digital library. The user is taken back to the project list screen by clicking on the '**Done**' button **(Figure 8)**.

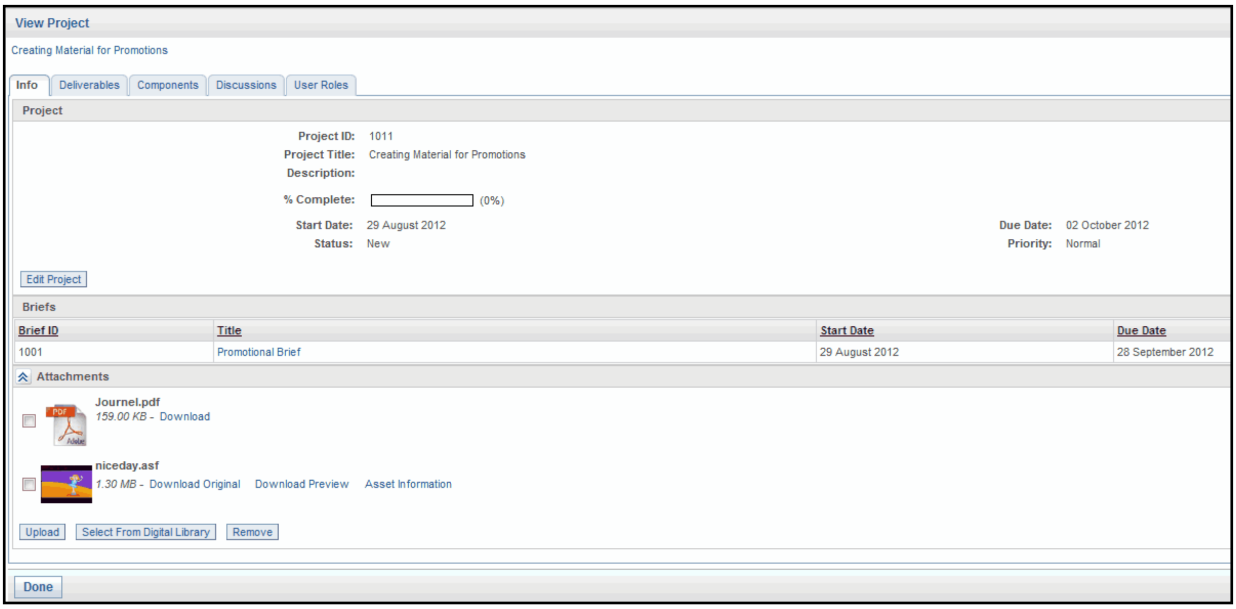


Figure No.8

- **Deliverables** - The deliverables related to the project are displayed with details such as title, status, contributor, deliverable manager/initiator, start and due date, % complete, completed on and instructions.

  The grid displays the deliverable, tasks, steps and the contributor when assigned. By clicking on the icon next to the deliverable title, the following options are displayed **(Figure 9)**:
  - **Info** – The user is taken the info tab of the deliverable where the deliverable details are displayed.
  - **Digital Assets** – The user is taken the digital asset tab of the deliverable where the digital assets for the deliverable can be viewed/cataloged.
  - **Modify Contributors** – The user is taken to the assign contributor screen where the contributors for the tasks can be added/deleted.
  - **Copy Deliverable** – Creates a copy of the deliverable and takes the user to the tasks tab of the deliverable.
  - **Delete Deliverable** – The deliverable can be deleted.

For the tasks, clicking on icon, the user can add contributors for the task or delete the task.

The following options are present on this screen **(Figure 9)**:

- **Delete** – Multiple deliverables can be selected and deleted.
- **Add Deliverable**: The user can add deliverables by selecting the deliverable type.
- **Search and Copy Deliverable**: The users can search and copy deliverables for which the user has access to in a specific project. The user creating the copy is appointed as the Deliverable Manager by default. The information associated with the deliverable also gets copied. This includes the basic deliverable information, facet information, facet series associated with the deliverable, components not including the assets, all tasks, task facets, steps, step facets, contributors etc. The facet files/binders and digital assets associated with the tasks and deliverable are not copied.

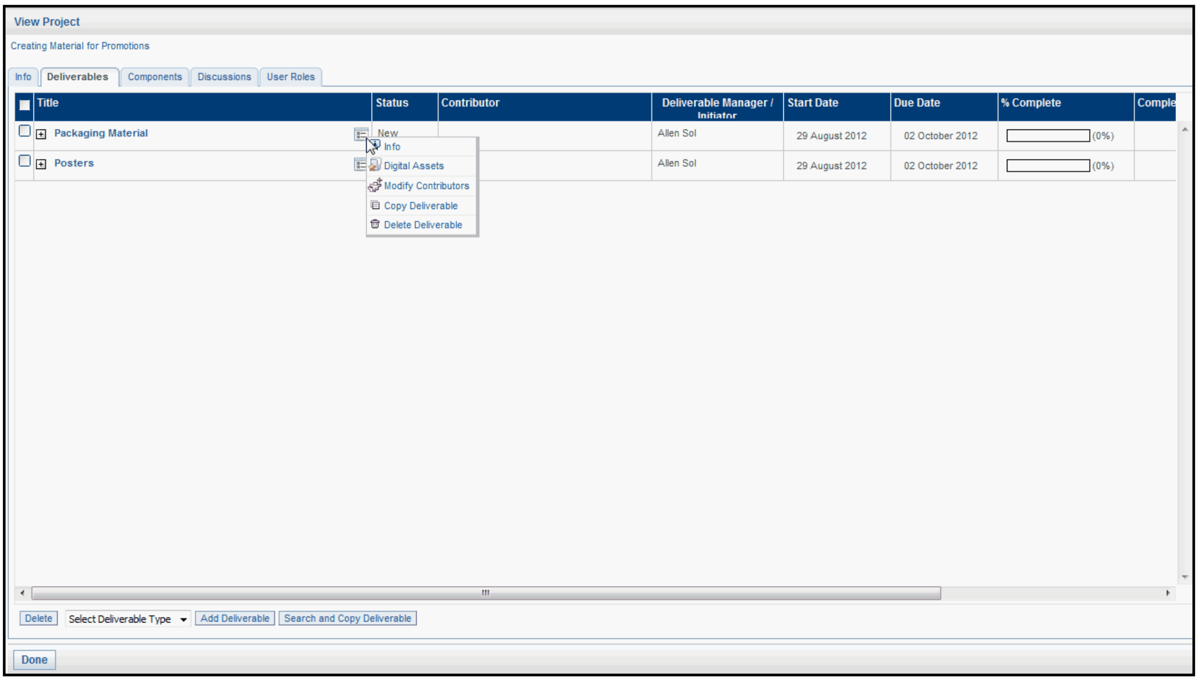


Figure No.9

- **Components** – Depending on the configuration this tab is visible **(Figure 10)**. Components are parts of a deliverable that are managed through a single workflow. There will be one workflow process to manage the components of the deliverable.
  At the project level the entire components list in the project across all the deliverables will be visible. This list will allow the Project Manager/Acting project manager to edit all the components which are not locked but a new component cannot be added. This list is shown only if any of the deliverable type have components associated. If a component at the deliverable level is being edited it is locked till the operation is completed. A component cannot be edited if it is completed, onhold or cancelled.
  Selected components can be edited or exported to an excel sheet.

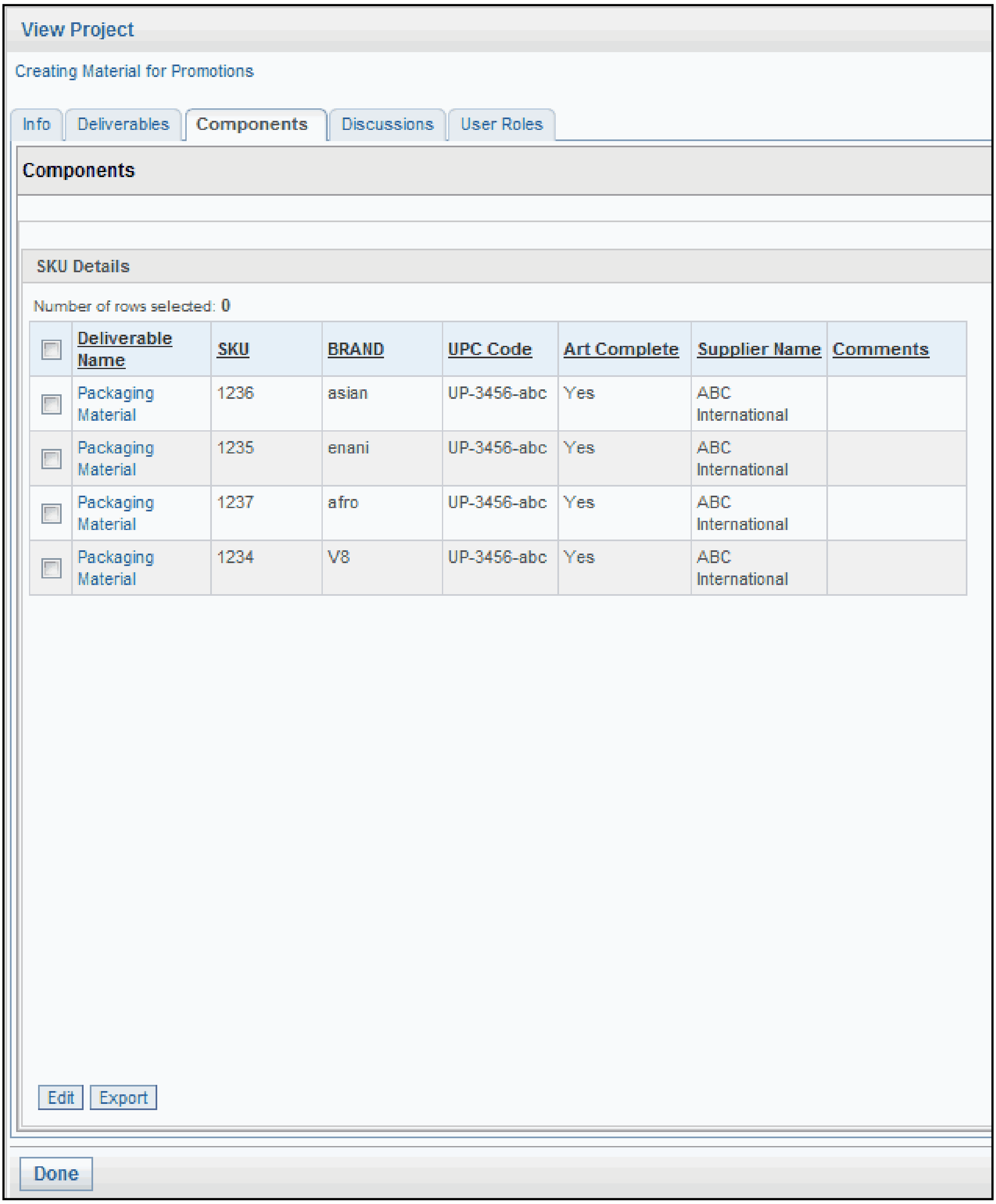


Figure No.10

- **Discussions** – The Project manager can have a collaborative forum, where the stakeholders of the project can discuss the related topics by using discussion forums. A topic can be initiated within a project and the invitees (users and groups) can be selected. These invitees will receive a notification. All the discussions for a project are shown in the Discussions tab.

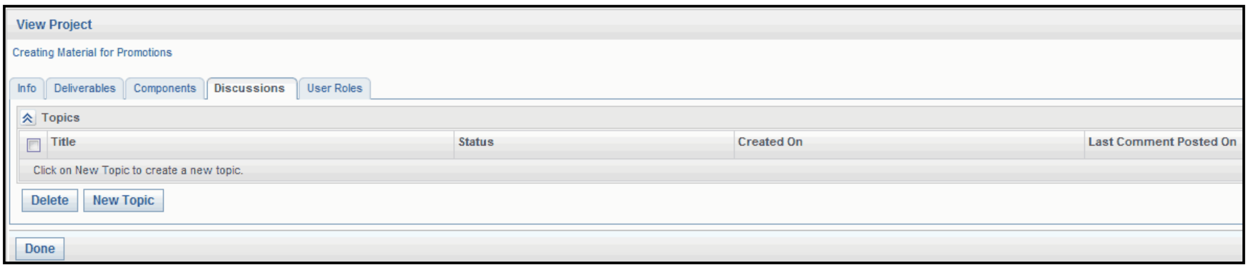


Figure No.11

Click on the '**New Topic**' button **(Figure 11)** to initiate a new topic. A topic details screen **(Figure 12)** is displayed where the details such as title, description, start date and valid until (date) can be entered. The user can select whether the initiator needs to be reminded about the topic closure and before how many days. Other details such as whether to close the topic on the due date or whether to notify the initiator on closure and reopen the topic, and whether to post details can be specified. Attachments can be uploaded for the topic.

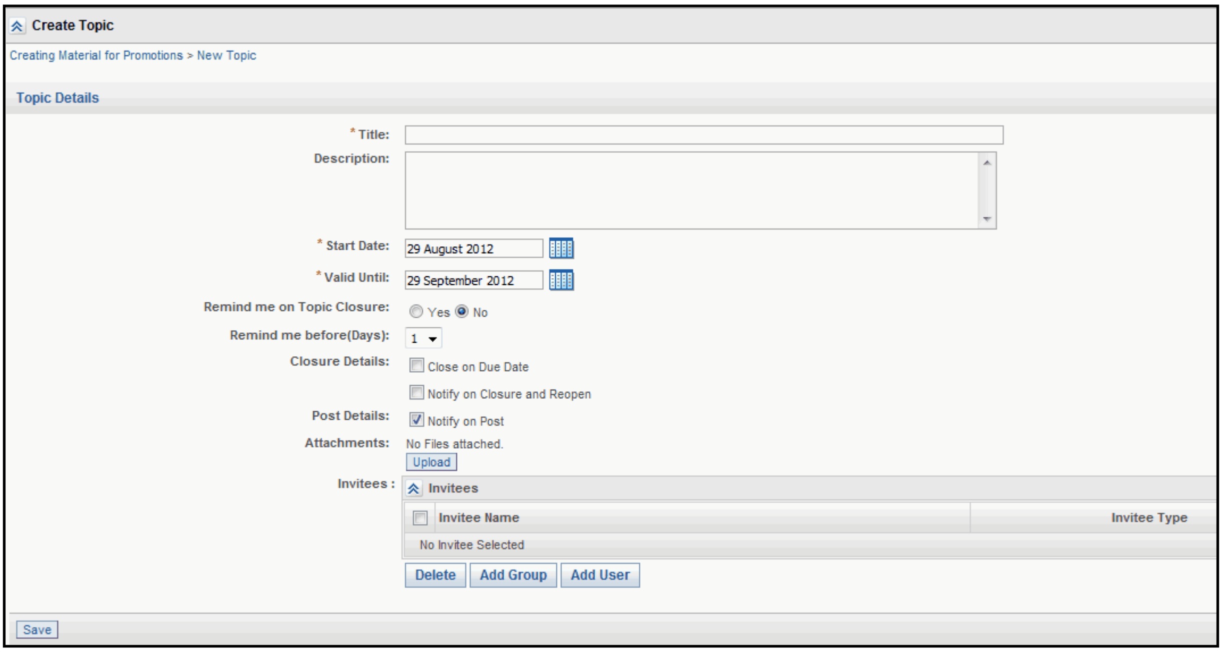


Figure No.12

- o All the invitees can view the photo of the person who posted responses along with the post. As a participant in the discussion, a notification on the posts made by other responders will be sent and the participant has a choice to unsubscribe i.e. the participant will not receive any notifications regarding the topic.

- **User Roles** - The user roles such as the project manager and the acting project manager for the project are displayed and can be changed by clicking on the '**Select Project Manager**' or '**Select Acting Project Manager**' links respectively. The admin user can create one or many Restricted Groups per Project Type and add users from the system to the group. The selection of Project manager/Acting Project Manager will then be restricted to this group. Also while configuring a Brief Type, the admin user can configure whether the entire list of users should be displayed for selection or only the users from the

Restricted Groups should be displayed.

The default readers are displayed here. Default readers can be set by the administrator for the brief/project/task type. Additional readers can be added by clicking on the '**Add User**' button. A complete access users and groups can be added. These users get visibility and write access to the projects in case the Project Manager or Acting Project Manager is not available and the Project is in progress. The users of the Complete Access Group (set by the administrator in process designer) have the same access as the Project Manager. Notifications will be sent to all the users/groups in the Complete Access Group on the following events:

- o An instance of a Project is created for which the user is a part of the Complete Access Group.
- o For an instance of a Project, the user is removed from the Complete Access Group.
- o When the user is added to the Complete access User/Group for an instance of a Project

Click on the '**Done**' button **(Figure 13)** to go back on the project list screen.

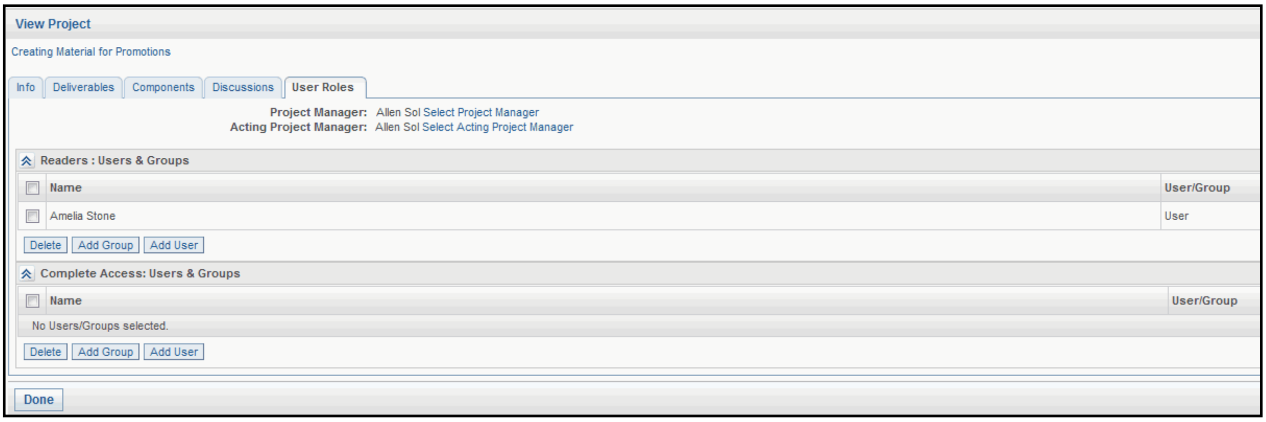


Figure No.13

Managing Deliverables

Traverse to Manage > View Deliverables. A list of deliverables is displayed for which the user is a deliverable manager or all the deliverables of the projects on which the user has write access (Project Manager, Acting Project Manager, member of complete access group which is set by the admin in Process designer for the project). The following can be viewed on this screen:

The status of each deliverable with respect to the due date and how many tasks for the deliverable is complete.

1. The status of the deliverables and also the active tasks within the deliverable.
2. The delayed deliverables/tasks are highlighted.
3. The currently active tasks.

The deliverable tab on the project information screen displays a list of deliverables for the project and allows the user to add new deliverables by clicking on '**Add Deliverable**' button. The creation of a Deliverable happens in three steps:

- **Selection of the deliverable type** - The user can select the deliverable type for the project from a drop down list defined by the administrator.

- **Selection of contributors for the deliverable** – This screen is displayed based on the configuration done by the administrator. Once the deliverable type is selected click on the '**Done**' button. This brings the user to an assign contributor screen where the user roles are displayed. The user can select contributors who will participate in the creation of the deliverable. Click on the '**Done**' button.
- **Details of the deliverable** - The user can provide details such as deliverable title, description and start date. The Due Date can be specified instead of the start date by clicking on the '**Edit Due Date**' button and the system will set the start date for the deliverable accordingly. To save the new deliverable click on the '**Save**' button. A view deliverable screen is displayed.

Viewing Deliverable Information

A view deliverable screen is a tabbed view with information related to the deliverable shown organized under the following tabs:

Info tab

The information related to the deliverable such as the deliverable ID (if configured), deliverable title, description, start and due date, status and % complete is displayed here. Other deliverable information which is transferred from the project/task or any search information is also displayed here. The user can edit the details by clicking on the '**Edit Deliverable**' button.

The attachments if any are also displayed here. If the attachments are references from the Digital Library then the '**Download Original**', '**Download Preview**' and '**Asset Information**' links are present for the asset else only the '**Download**' link is present. The user can add new attachments either from the desktop or from the digital library. The user is taken back to the project list screen by clicking on the '**Done**' button **(Figure 14)**.

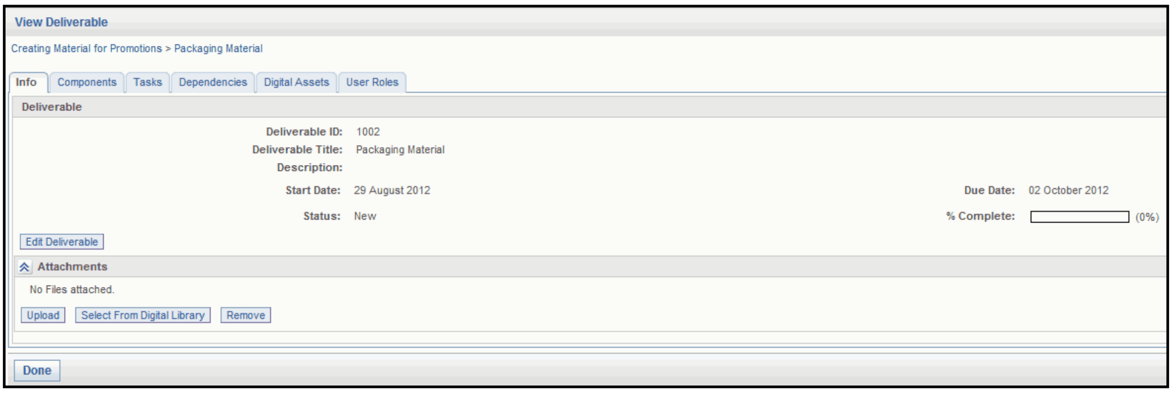


Figure No.14

Components tab

Depending on the configuration this tab is visible **(Figure 15)**. Components are parts of a deliverable that are managed through a single workflow. Components are a package within which there are multiple deliverables.

The assets can be viewed by clicking on the '**View Assets**' button. Depending on the tasks assigned to the contributors, the components can be added/modified/deleted from the Workflows. When a contributor edits the components, the components can be exported or a batch download can be done.

The Deliverable manager can do an initial lock (can edit the components but cannot add new components) or can do final lock (cannot edit or add components). When a final lock is done the assets are ready to be cataloged into DAM (In the Digital Assets tab).

Depending on the tasks assigned the following buttons are either visible or hidden to the contributor: Edit, Export, Initial Lock, Final Lock and Batch Download.

The Components list can link files that are routed for approval with rows in the Components list. This is useful for generating SKU status reports and being able to visually identify the component (row) to which the approved file belongs and reporting on the status of each component in the list.

Download an excel sheet to import data by clicking on the link on the screen above the '**Done**' button.

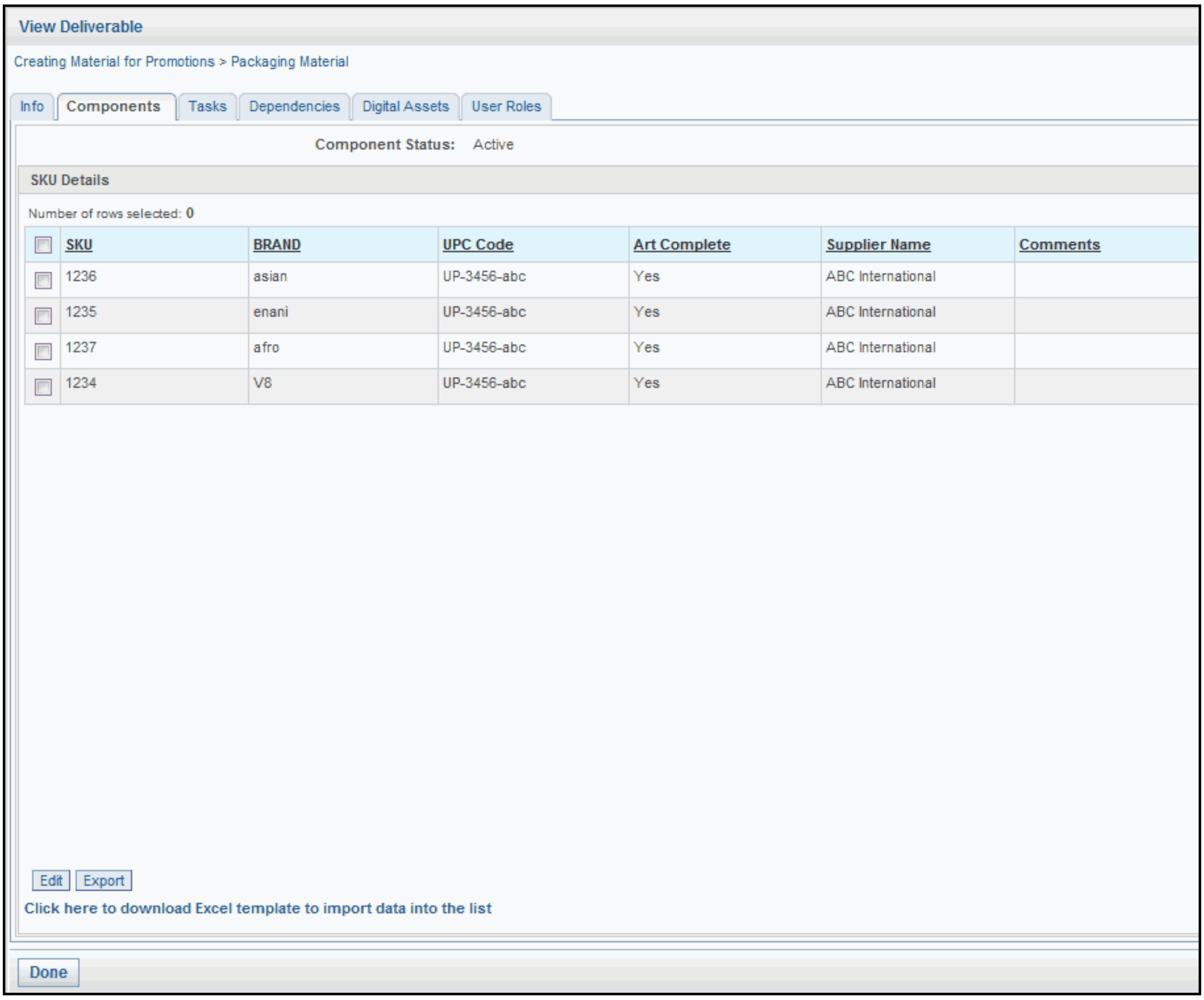


Figure No.15

Tasks tab

List of tasks related to the deliverable are displayed here **(Figure 16)**. Details such as title, status, initiator, contributor, instructions, start and due date, completed on and the % complete (all these fields are visible by scrolling horizontally) can be seen. These can be seen in the list view:

When  icon, which is next to each task is clicked :

- In case of route or discussion task, the task can be deleted or a contributor can be added.
- In case of assignment, gather info or web services task and active task can be cancelled or new task can be deleted.
- In case of tracking task, the task can be completed or the task can be cancelled/completed.

The following actions can be performed on this screen:

- **Add Task** – New tasks can be created by selecting the task type and clicking on the '**Add Task**' button.
- **Modify Contributors** – The user can select contributors who will participate in the execution of the task.
- **Modify Timeline** – Clicking on this button a modify timeline screen is displayed. The user can view the list of tasks for the deliverable with the start and due dates for the task. The number of days required to complete the task can be modified by providing a numeric value in the duration edit box next to each task. Many a times there is a requirement that a deliverable has to end by a fixed date so that the next things can be scheduled accordingly. The users know the fixed due date of the deliverable and they want to know when they should start the deliverable so that it gets completed by the decided due date. To edit the due date click on the '**Edit Due Date**' button. The system will create the deliverable with the given due date and will set the start date for the deliverable accordingly. After the deliverable is created the user can still modify the Due date of the deliverable by using the Modify Timeline functionality and can adjust the timeline.
  Validations such as the start date of the deliverable should not be less than the project start date, etc are done.
- **Save as Baseline** – The dates that the initiator enters while creating the deliverable and initiating the task can be saved as the baseline dates i.e. the actual dates, when the task is started and completed will be compared to these dates. If the baseline dates and the actual dates do not match then the task is marked in red showing that it is delayed.

The task details can be edited by clicking on the task title.

If any of the tasks are auto initiated then the 'Auto' sign will be displayed next to the task.

Note: In case of auto-initiated tasks the prerequisites are not setup the task cannot be started. In such a case, the Deliverable Manager is notified and then the task can be submitted manually after setting up the required prerequisites.

A task can be set to be auto initiated by the system without any dependency on an earlier task. The task starts on a preset start date and a Back Office Service ensures that the task is started automatically at the scheduled Back office service time.

Notifications and Reminders are sent to the project manager, deliverable manager to inform them about the successful/unsuccessful start of these tasks.

There are two modes in which the tasks can be viewed, the default view can be set by the admin:

1.  – A list view icon. The tasks will be displayed in a list view **(Figure 16)**. In this view, the tasks can be viewed and all the actions mentioned above can be performed.

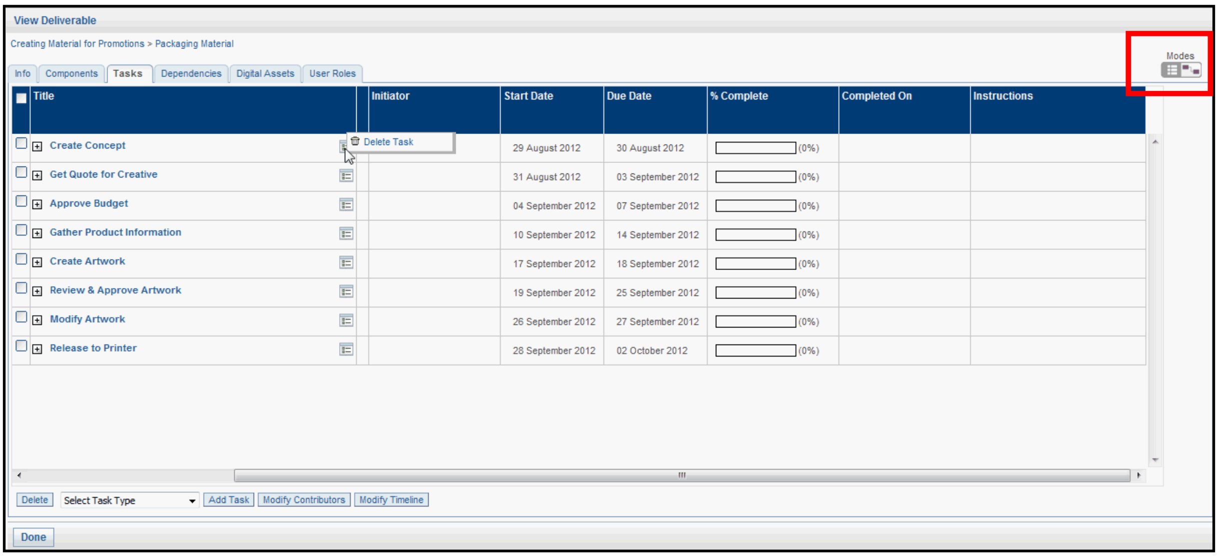


Figure No.16

2.  - A Visual Workflow view **(Figure 17):**
   a. The tasks can be viewed in a flow chart with the boxes representing the tasks with the start and the end dates.
   b. New tasks can be added for a deliverable by just dragging a new box onto the canvas, naming it appropriately , connecting it at the right place, selecting the contributors and submitting it
   c. The user can provide task titles for the newly added tasks
   d. The dependencies between tasks can be changed.
   e. Contributors for the tasks can be seen in the Visual Editor and on a mouse over the system displays the contributor name along with the step title assigned to him/her.
   f. The current status of a task can be viewed from the status bar above each task box – blue indicates completed tasks, red indicates delays and green indicates in progress tasks.
   g. The workflow can be exported as an image or a PDF for reporting purposes.

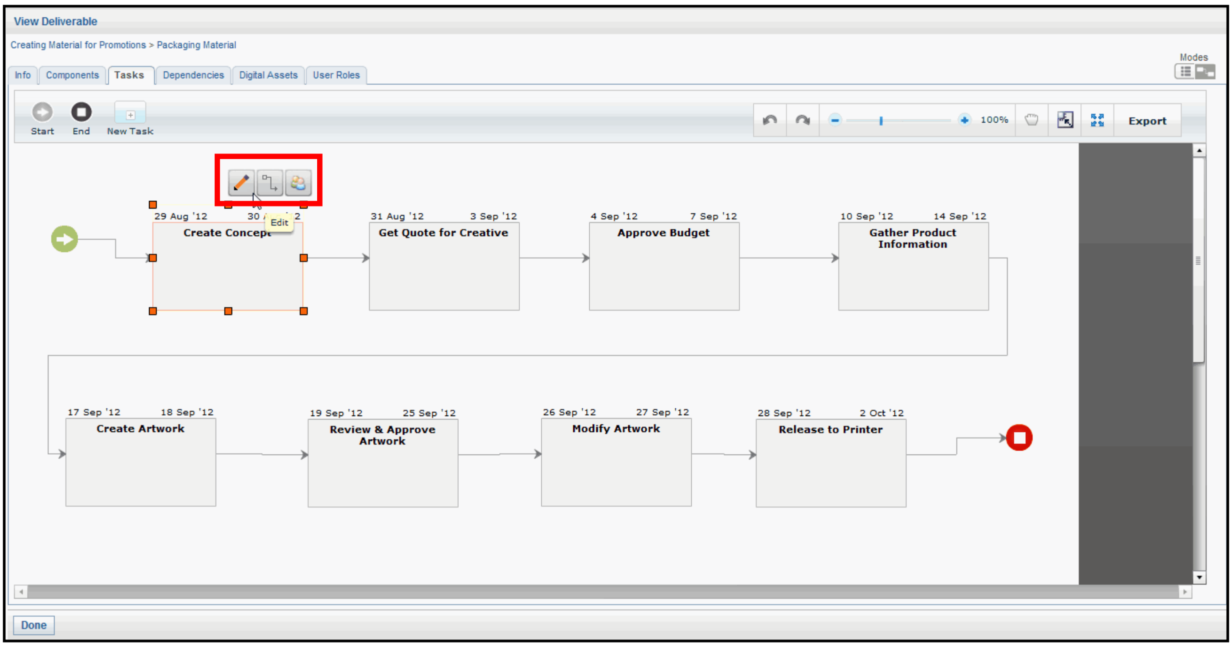


Figure No.17

Dependencies tab

Here the user can specify the deliverable dependencies on other deliverables. Selecting deliverables within the project by clicking on the '**Select Deliverables**' can do this. The user can also remove the dependency by selecting the dependent deliverable and clicking on the '**Delete**' button.

Digital Assets tab

Multiple digital assets can be cataloged for a deliverable. The user can catalog an item by clicking on the '**Catalog Assets**' button. Assets cataloged in the components can be cataloged into DAM using the 'Catalog from Components' option.

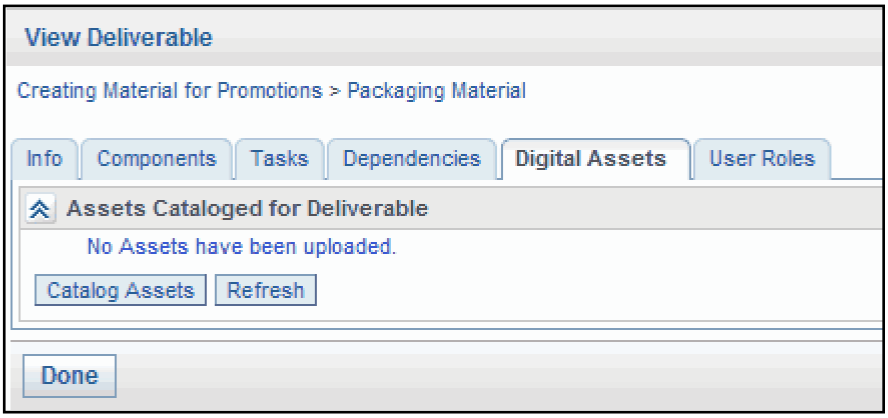


Figure No.18

A catalog assets for deliverable screen is displayed **(Figure 19)**. Select whether the asset is to be cataloged from an external media, from a task (shows the list of tasks for the deliverable from where the asset can be cataloged) or from the components (if the component status is in final lock). Select the section where the assets are to be cataloged in DAM by clicking on the '**Select Target Section**' link. A select target sections screen is displayed where the user can navigate the section hierarchy and select a section. If the target section has been predefined then it will be displayed. Confirm by clicking on the '**Done**' button.

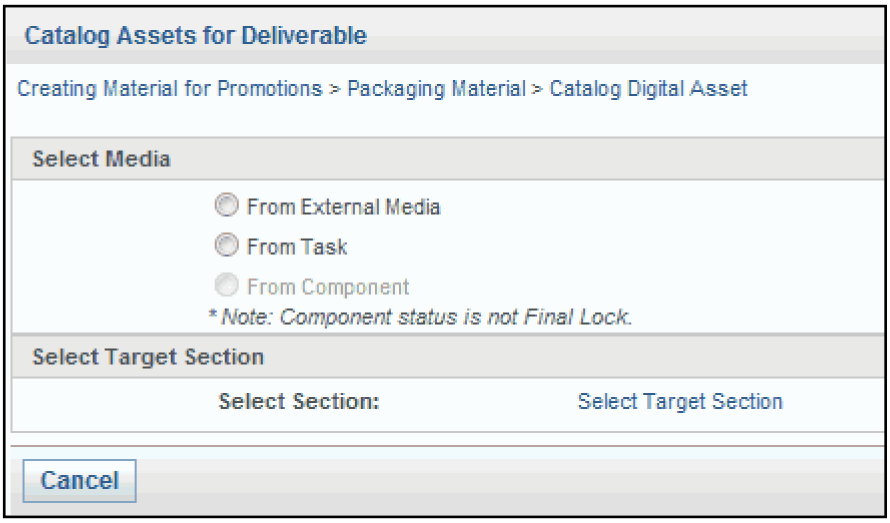


Figure No.19

After selecting the section click on the '**Next**' button to browse and select the original, preview and thumbnail files (if the media selected is external) and click on the 'Upload Files' button. The files are transferred for cataloging and the names appear next to the browse button. Add the business information by selecting the appropriate business information facet and clicking on the 'Add' button in the 'Business Information' section. Click on the '**Save**' button to catalog the item.

Notes:

1. If the task initiator selects the Assets uploaded in response to the Assignment Task and clicks on the 'Catalog for Deliverable' button, the digital asset gets transferred to the deliverable and cataloged into DAM. The configured data to be transferred from the Workflow to DAM is also moved.
2. When a contributor of a task uploads an asset in response to the task if configured in Process Designer, the Digital Asset automatically catalogs the Asset into a predefined section path for the deliverable. Any data that is configured to be transferred from the Workflow to DAM is also moved by the system. The configuration for the data to be moved is done through a Data Transfer configuration utility.

User Roles tab

In workbench we have a project manager and an acting project manager who are responsible for the launch of deliverables and tasks in the project. There are cases where the project manager (or the acting project manager) might want to delegate a certain deliverable to another user who is l be the deliverable manager. This user will be responsible for the deliverable and will have the authority to add, delete, modify, submit, and cancel the tasks. The user role tab displays the deliverable manager. From here the project manager, acting project manager or the deliverable manager can change the deliverable manager as well as add the user who should not have access to the deliverable **(Figure 20)**.

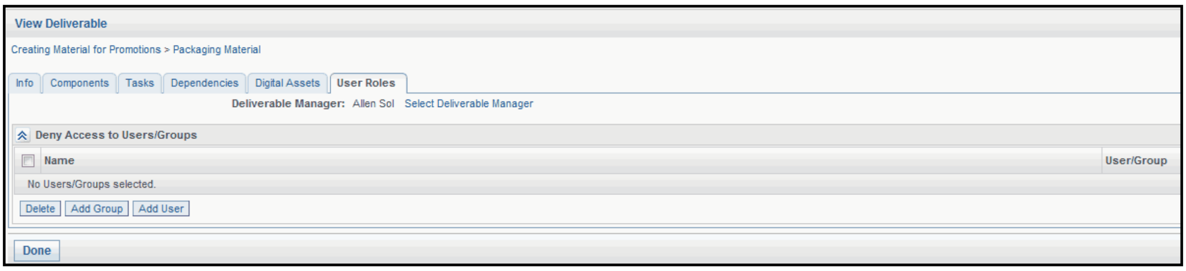


Figure No.20

Marking the Project/Deliverable as Complete

Once all the tasks for a deliverable are completed, the deliverable can be marked as completed by going to the info tab of the view deliverable screen and changing the status. When all the deliverables in the project are delivered, the % done for the project is 100%.

In the info tab change edit the project and change the status of the project to completed and click on the '**Save**' button, to mark the project as complete.

The project could be put on hold and resumed later. When the status of the project is changed the concerned users will get notifications.

Reopening Project/Deliverable

A closed or cancelled Project and/or Deliverable can be reopened. A Project can be re-opened by the Project Manager, Acting Project Manager or any member of the Complete Access group. A closed or cancelled deliverable, which is within an active Project can be re-opened by the Deliverable Manager.

Projects and Deliverables whose statuses are completed or cancelled can be re-opened.

Impact of reopening a deliverable/project:

1. If a Deliverable is to be reopened and its Project is closed, the Project is reopened.
2. Any dependency between the Deliverables of the Project is removed at the time of re-opening because a dependent Deliverable's timeline is affected by re-opening a Deliverable. If the status of the successor deliverable is New/Draft then the dependencies are not removed from the predecessor deliverable that is getting re-opened.
3. The Deliverable end date changes based on the newly added tasks to the re-opened Deliverable.
4. The Project end Date changes based on the newly added tasks to the re-opened Deliverable.

Managing Tasks for a Deliverable Using the List View

There can be multiple tasks required for a deliverable. The task tab on the view deliverable screen **(Figure 12)** displays a list of tasks for the deliverable. Click on the task name link to edit the task. A task edit screen is displayed where the user can either submit the task if it is in 'New' or 'Draft' state or cancel the task if it is in progress.

A new task for the deliverable can be added by selecting the task type and clicking on the '**Add Task**' button **(Figure 13)**. An edit task screen is displayed with the following tabs:

- **Info** – Details such as the task Id (if configured), task title, instructions and the start date for the task can be entered. The due date, status and % complete are displayed here. The task initiator can select the checkbox 'Notify if task is delayed' for being notified if the task is delayed

The associated facets if any are displayed and the user can fill in additional information for the task. Depending on the type of task either the steps if any are displayed for which the resource type and the contributor can be selected (for assignment, gather information and route task). The duration and the instructions can be entered for each step.

For the route task the file to be approved can be uploaded, the approvers can be selected and the duration can be entered. Attachments can be added by clicking on the '**Add**' button. The task duration depends on the type of task:

  - Step duration in case of Assignment, Gather Information and Route task types.
  - Task duration in case of Tracking and Discussion task type.

Template documents are displayed which can be downloaded and filled by the user with additional information for the task and can be attached in the attachment section.

- **Dependencies** – The task gets saved when the user clicks on this tab. The tasks which the current task is dependent on are displayed with details such as task title, status, start and due date, completed on and % complete. The user can add more tasks by clicking on the '**Select Task**' button.
- **User Roles** – Readers can be added by clicking on the '**Add User**' button, which displays a user selection screen. Here the readers can be selected from an existing list of users. Once the reader is selected click on the '**Done**' button.

Click on the '**Save**' button to save the task, '**Save And Close**' button to save the task and close the screen, the '**Submit**' button to submit the task to the user selected to execute the task. By clicking on the '**Cancel**' button the operation is cancelled.

When the user submits the task an email notification is sent to all the contributors/approvers of the task depending on how the task is routed. If the task is routed sequentially then the first contributor/approver of the task receives an e-mail notification. If it is routed simultaneously then all the contributors/approvers receive an e-mail notification at the same time.

After a task is submitted the due date of an active task can be changed if required. The following happens:

1. As a task initiator, the 'Active' steps can be changed using the Modify Timeline screen.
2. The Timeline is recalculated if there is change in the duration for task/step.
3. Contributors will be notified if duration for the steps assigned to them gets changed.
4. Validations are done before updating the changed duration for the task/step.

The details screen will vary depending on the task type. The tasks can be of one of the following types:

Assignment Task

A task can be assigned to a contributor to perform a particular function for which the response can be given. E.g. Create Artwork Task is assigned to a designer who then responds with the artwork file.

An assignment task is sent to the contributors sequentially. After the first contributor responds a notification is sent to the second contributor. The task initiator can change the contributor of the active step. Both the old and the new contributors get an e-mail notification for the same. The contributor of the first step can select/change the contributor of the next step.

The initiator can choose to get a notification if the task is delayed and get a notification before the due date.

A task initiator can re-route the task without having to add the task multiple times. The information such as Entity and Facet Information, Step information - Entity and Facet Information, user roles for the tasks, contributors and attachments are carried forward. The earlier contributor's name, email id and response will also get forwarded for reference.

The task is completed after all the contributors have submitted their responses.

The screen has the following layout with three tabs as follows:

- **Info** – Here the task information is displayed. The user can also select the contributors and provide necessary instructions to complete the task **(Figure 21)**.

  The task initiator can decide whether the contributors can view the project and deliverable information by checking the checkbox 'View Project & Deliverable Info' for each contributor.

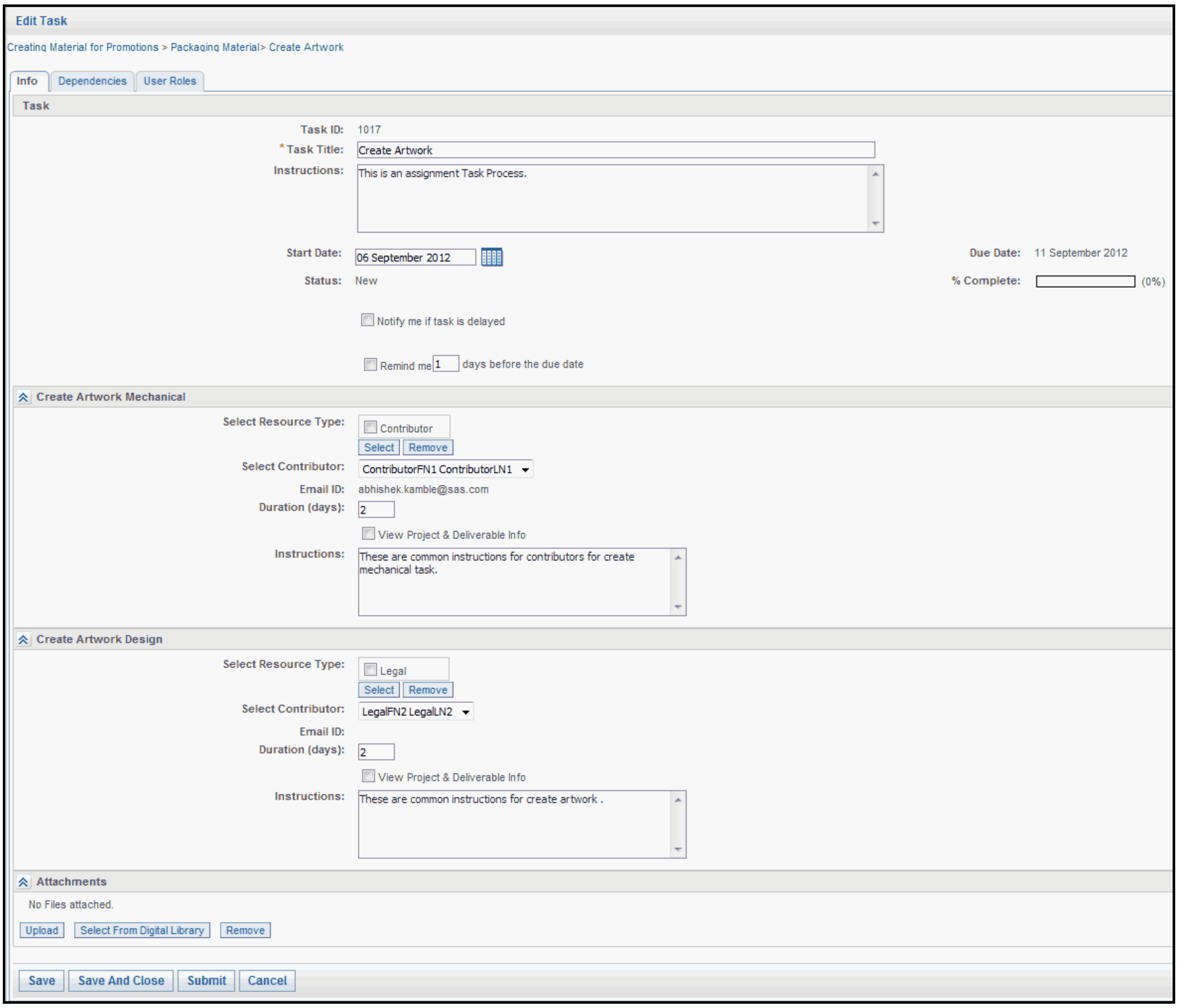


Figure No.21

- **Dependencies** – Here the tasks on which the current task is dependent on are displayed **(Figure 22)**. The user can select more tasks or delete the existing ones.

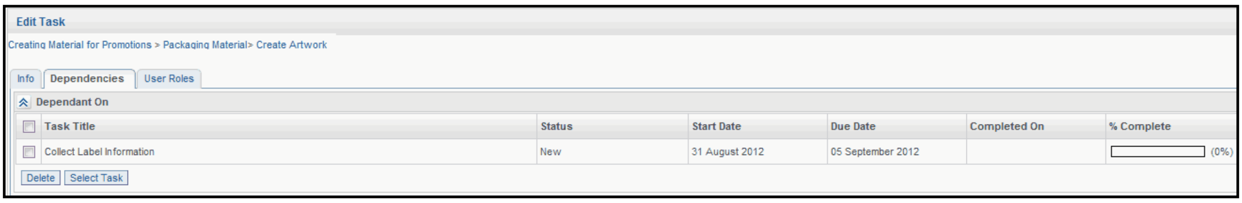


Figure No.22

- **User Roles** – Here the default readers which are configured by the admin in process designer are displayed and new readers can be added. The groups/users to which the notifications need to be sent on the task completion can be added from here (**Figure 23)**.

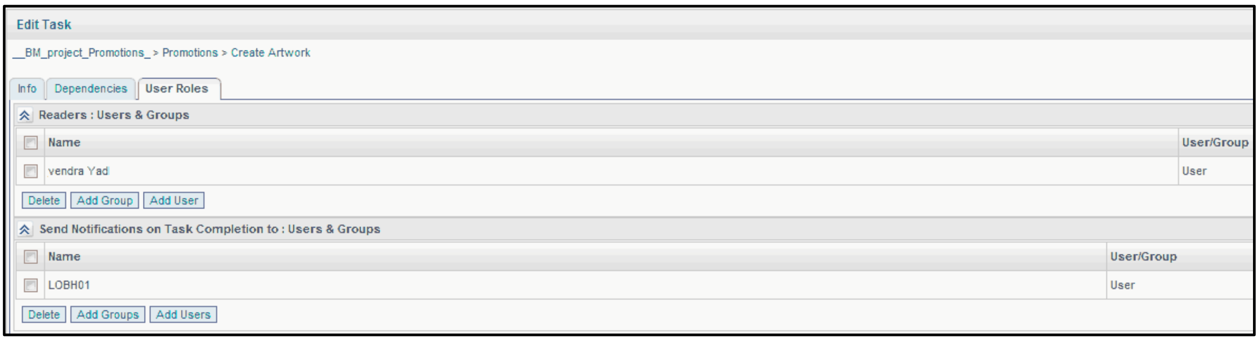


Figure No.23

Gather Information

This is similar to an assignment task and is used to gather information from multiple sources. This is a simultaneous task i.e. Multiple contributors can submit the information at the same time. Each contributor can respond to a specific functional area. E.g. To create an artwork, the project manager will need branding information from the brand manager, product information from the product manager, legal information from the legal department etc.

The initiator can choose to get a notification if the task is delayed and get a notification before the due date.

The task initiator can change the contributor of the active step. Both the old and the new contributors get an e-mail notification for the same. All the steps for which the contributors are not selected are marked as cancelled. At least one contributor should be selected before submitting the task.

The task initiator can decide whether the contributors can view the project and deliverable information by checking the checkbox ‘View Project & Deliverable Info’ for each contributor.

When the gather information task is completed, the task initiator can re-route the task if required. All the task details/contributors/instructions/responses are carried forward or the task initiator can modify this and submit the task again. The earlier contributor’s name, email id and response will also get forwarded for reference.

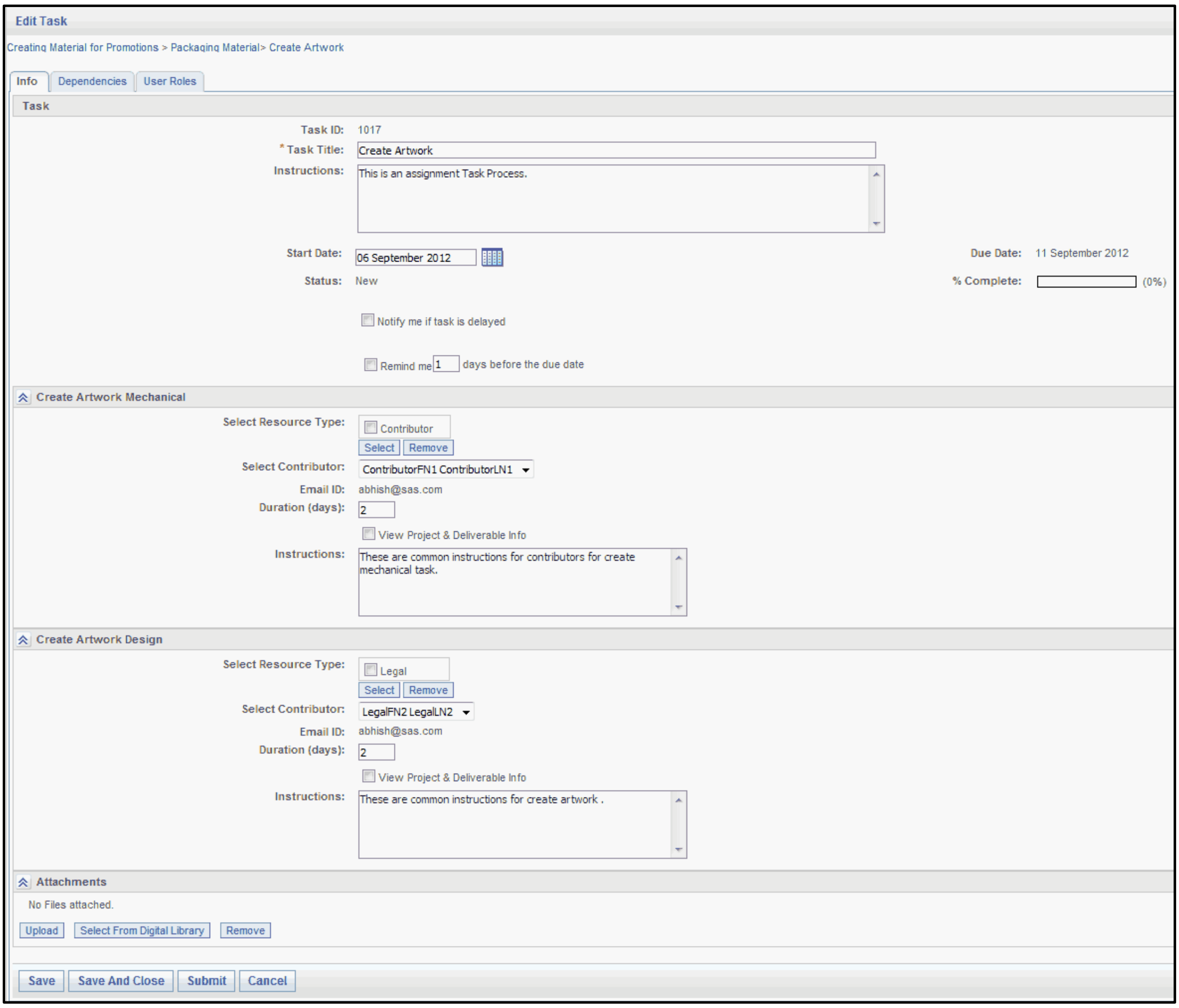


Figure No.24

Discussion

This type is used to initiate discussions between multiple contributors. Each contributor can put in multiple responses to the same discussion. A discussion task is a simultaneous task so at a given time multiple contributors can contribute. The task has to be marked as complete by the project manager/acting project manager/deliverable manager. In a discussion type of task there is a notification sent out to all the contributors when the task initiator submits the task.

The following notifications will be sent out if the task initiator wants to:

- **Notify me if task is delayed**: If the task is delayed i.e. the response haven't been posted then the task initiator will be notified.
- **Notify task initiator when response is posted**: Whenever a response is posted the task initiator gets a notification.
- **Notify contributors when response is posted**: Whenever a response is posted all the contributors receive a notification.
- **View Project & Deliverable Info**: If this checkbox is selected the contributors can view the project and deliverable information on their task response screen.

The initiator can choose to get a notification if the task is delayed and get a notification before the due date. When the task is marked as complete by the task initiator notifications are sent out to the contributors if the task initiator wants them to be notified.

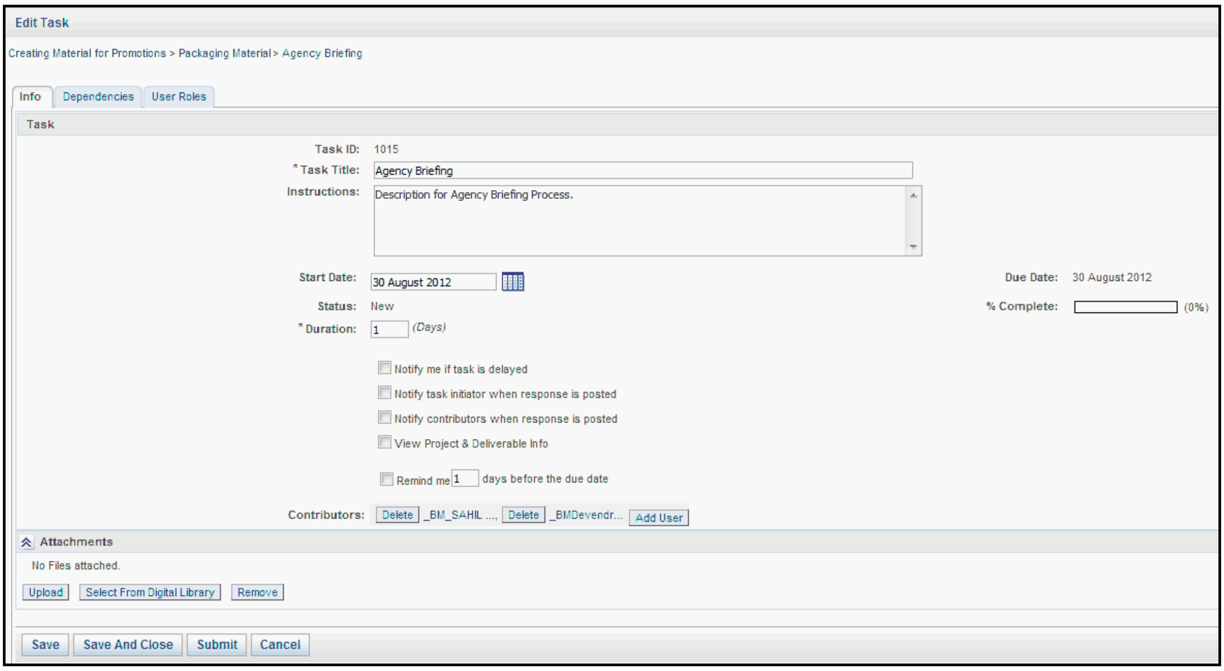


Figure No.25

Tracking

This type is used to track the project manager's tasks and is completed by the project manager. This type of tack can be completed even before it has been submitted by clicking on the '**Complete Task**' button. No contributors need to added but in the user roles tab the readers can be added.

The initiator can choose to get a notification if the task is delayed and get a notification before the due date.

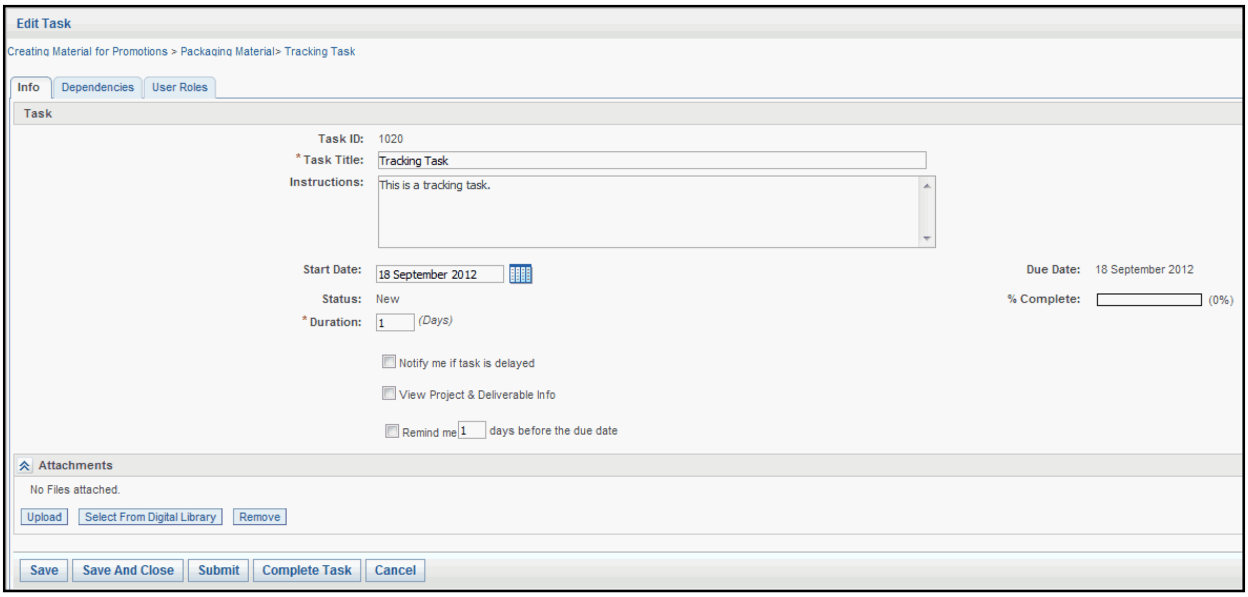


Figure No.26

Route

This task is used to route files which could be documents (typically PDF's and DOC) or video files to multiple reviewers for their approval, for e.g. approval of an artwork created by an agency. The project manager can set the route as sequential or simultaneous. The task is completed after all the reviewers respond.

Depending on the configuration, the predefined steps are displayed for an instance of the route task. These steps can be deleted if required or new steps added. The user can edit the name of the route step, if required. The selection of approvers for the predefined steps will be restricted to the performers selected in the Process Designer.

If the 'Cancel Approval if rejected' checkbox is selected for a reviewer then if this reviewer rejects the task then this task gets cancelled even before any other reviewer can put in their comments.

The initiator can choose to get a notification if the task is delayed and get a notification before the due date.

The task initiator can decide which reviewer can view the project and deliverable information by checking the checkbox 'View Project & Deliverable Info' for each reviewer.

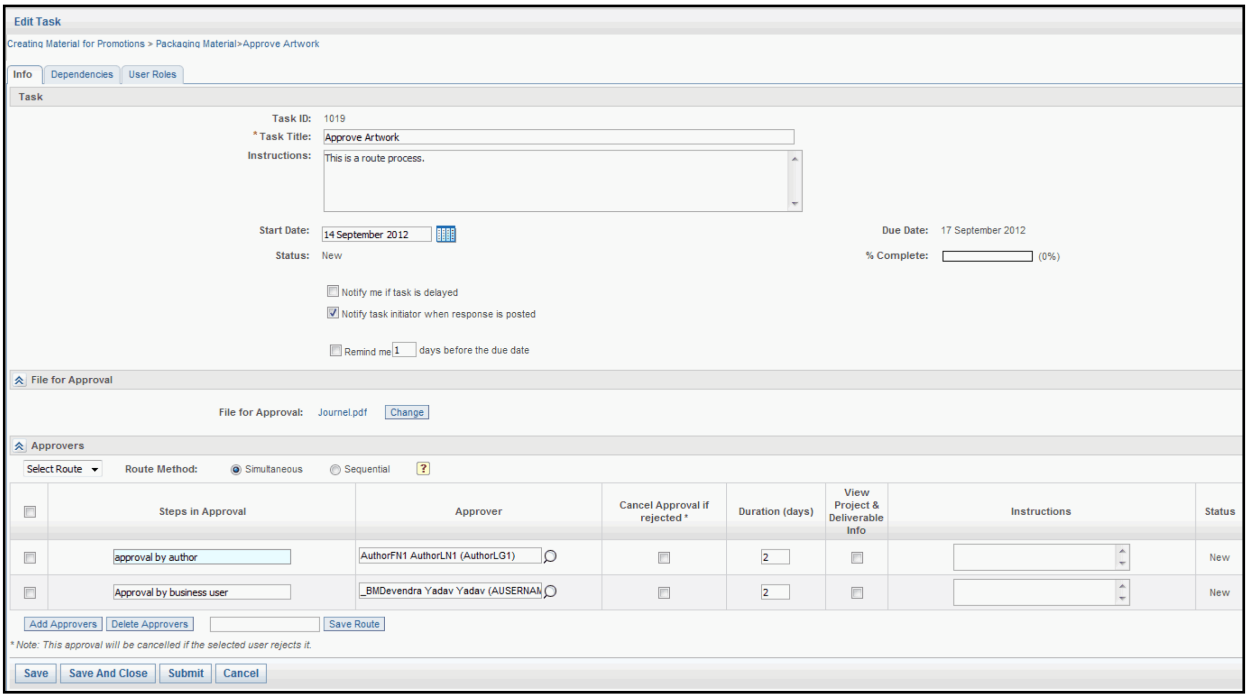


Figure No.27

Once the task is completed the task initiator can re-route the task without having to add the task multiple times. The information such as Entity and Facet Information, Step information - Entity and Facet Information, user roles for the tasks, contributors and attachments are carried forward.

If the data transfer is configured in Process Designer then the file for approval can be brought down from a deliverable and the consolidated file can be moved out to the deliverable.

The task initiator can also view a consolidated file of with comments given by the all the reviewers.

Note: In case WebDAV is enableIf '**~**' character is present in the filename of the uploaded file, then '**Send and Receive**' and '**Save and Work Offline**' buttons are not seen by default in the browser when the PDF file is opened by the approver. To enable these buttons, click on the Acrobat icon in the toolbar.

Multi-File Route task

Multiple files of different formats – for example: A PDF, a DOC and a video file can be routed in a single route task. The task can be tracked per file and per approver. There are options to skip a file or a reviewer after the task is routed and is Active.

The approvers can view all the files routed to them and they can comment on each file separately. PDF files can be viewed and commented online via the WebDAV technology. Word documents can be downloaded and commented on while videos can be annotated on directly using the video annotations tool online.

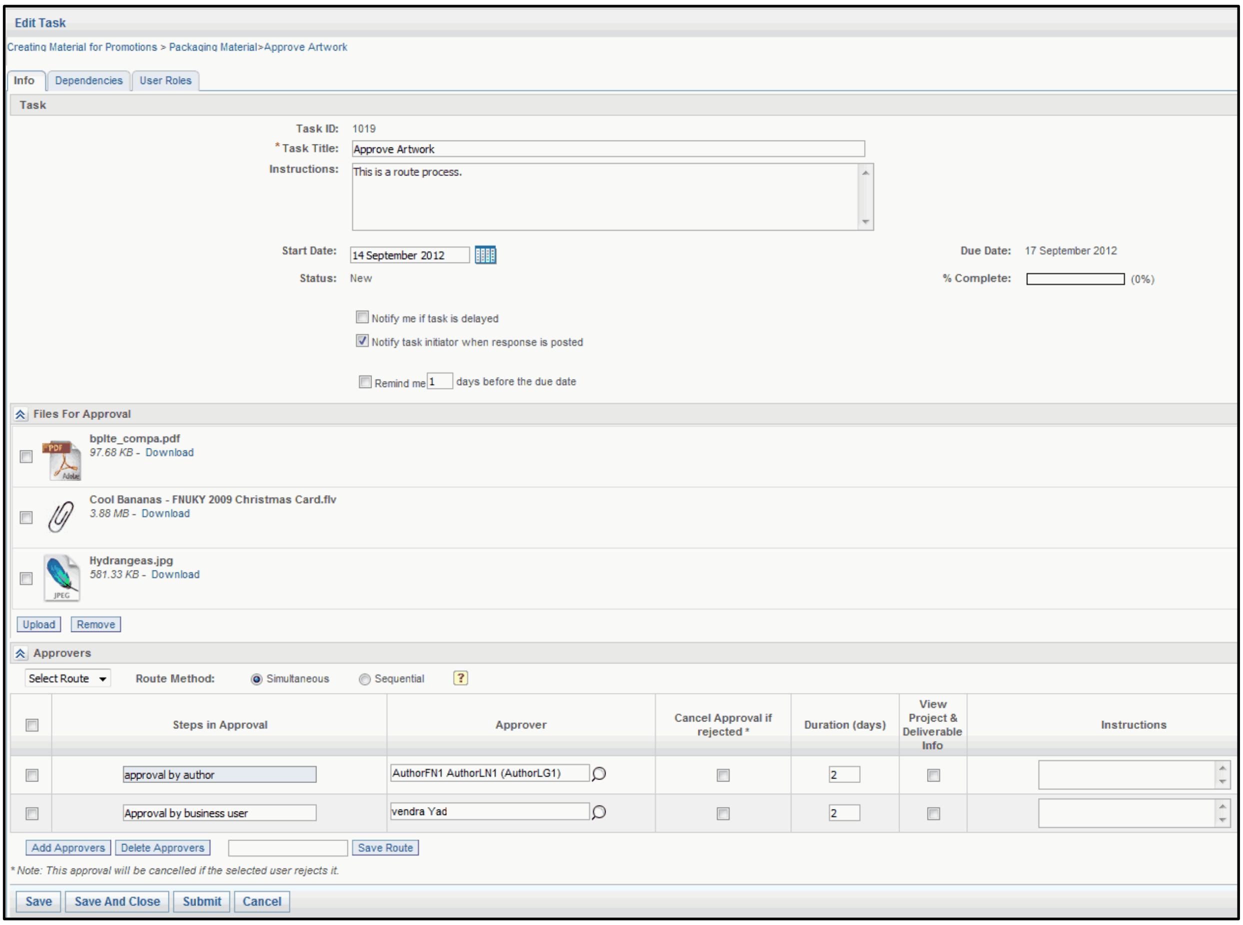


Figure No.28

Note: In case WebDAV is enableIf '**~**' character is present in the filename of the uploaded file, then '**Send and Receive**' and '**Save and Work Offline**' buttons are not seen by default in the browser when the PDF file is opened by the approver. To enable these buttons, click on the Acrobat icon in the toolbar.

Web Process task

A workflow can be initiated with a web process task in it. The task initiator can manage the execution of the task with minimum/no manual intervention. This kind of task can be auto initiated. On completion of the earlier task in the workflow, the web service task will be automatically initiated depending on the configuration. No contributors need to be selected for this type of task.

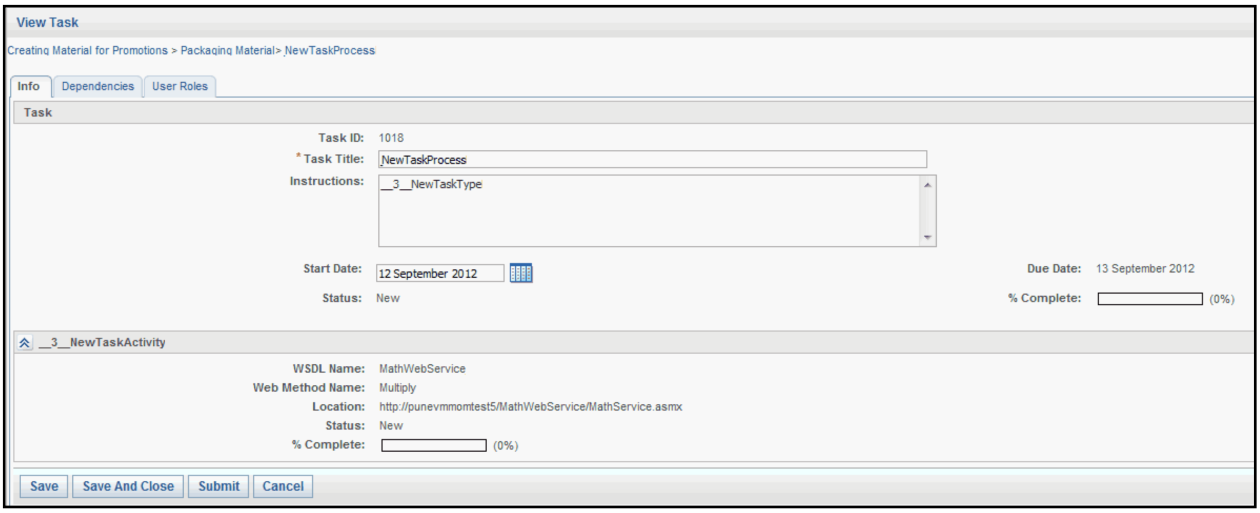


Figure No.29

Managing Tasks for a Deliverable Using the Visual View

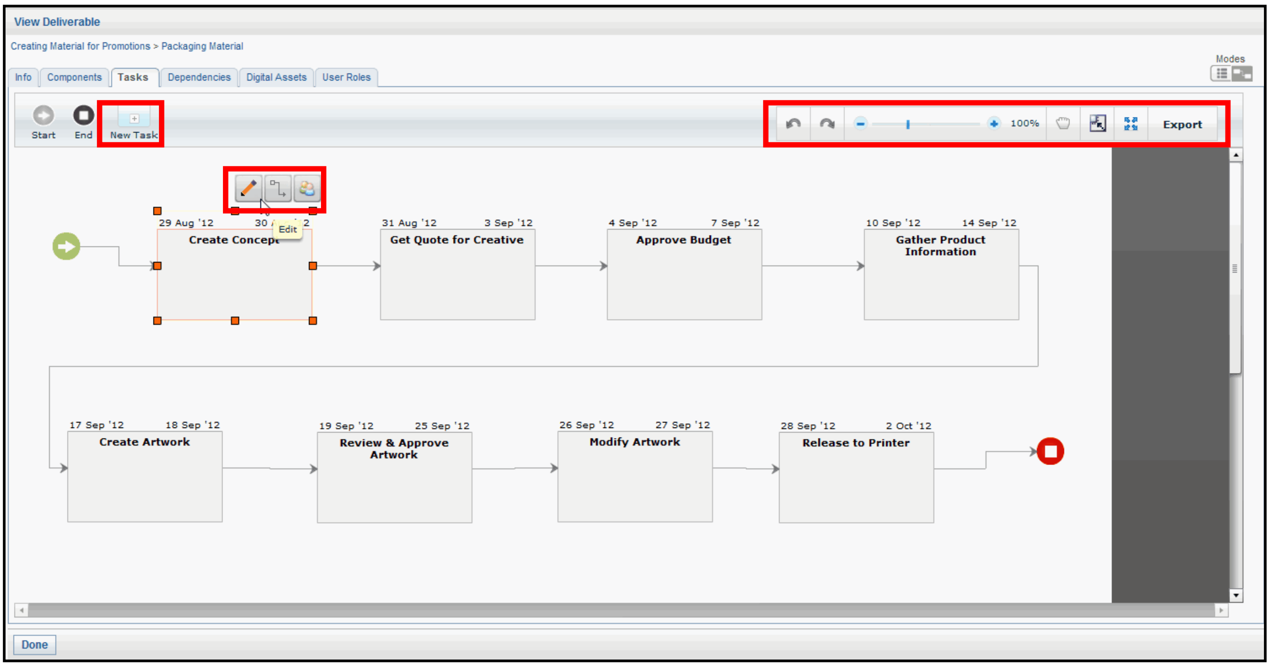


Figure No.30

A Visual Workflow view is displayed **(Figure 30)**:

- The tasks can be viewed in a flow chart with the boxes representing the tasks with the start and the end dates.
- New tasks can be added for a deliverable by just dragging a new box onto the canvas, naming it appropriately, connecting it at the right place, selecting the contributors and submitting it.
- The user can provide task titles for the newly added tasks by clicking on the pencil icon and add contributors.
- The dependencies between tasks can be changed by clicking on the arrow icon.

- By clicking on the icon of a contributor, instructions for the contributors can be added as well as the duration of the task for the contributor can be changed.
- The current status of a task can be viewed from the status bar above each task box – blue indicates completed tasks, red indicates delays and green indicates in progress tasks.
- The canvas can resized and exported as an image or a PDF for reporting purposes.

Perform

Contributors can perform the Task assigned to them in two ways:

- **Email Notification** – Email notifications are sent to the contributors when a project manager/initiator submits a task and to the project manager/initiator when a contributor submits a response. Delay reminders for a project and task are sent via emails to the Contributor. The notifications are sent to the brief initiator, when the status of the project is changed and to the contributors on the completion of tasks. The email notification contains a link to the perform task screen.

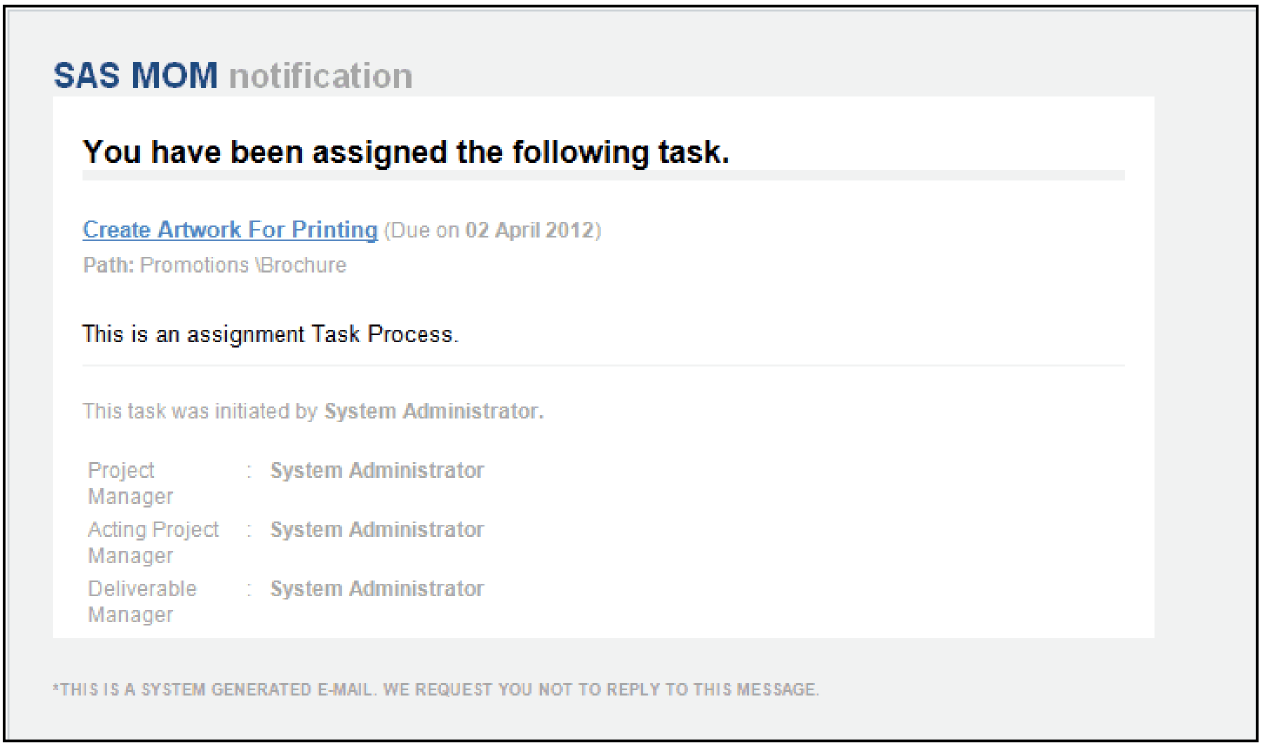


Figure No.31

- **Perform mode of the Marketing Workbench application** – Contributors can view the tasks assigned to them by clicking on the '**Perform**' link **(Figure 1)**. The list of tasks assigned to the logged in user can be viewed here **(Figure 32)**. The predefined search can be personalized by the user.

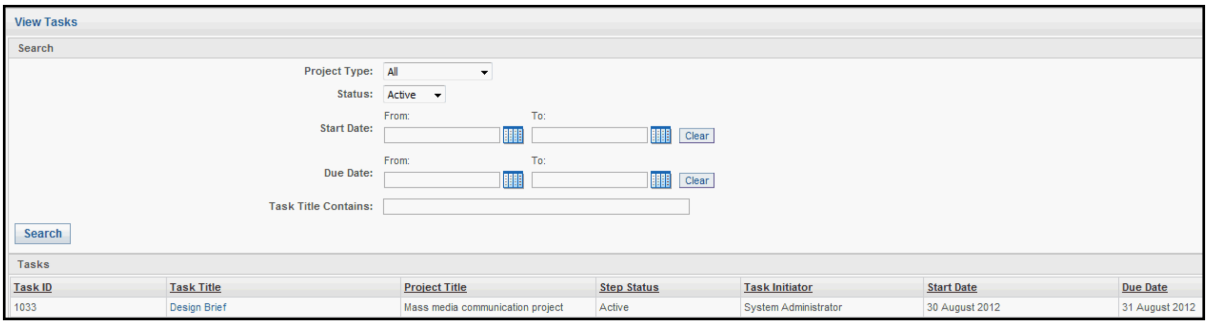


Figure No.32

This screen shows a list of tasks with their step status being completed or active. Each row has a task tile link, which when clicked takes the user to a task response screen. The user can provide comments here and attach documents if required. The user can also upload digital assets in response to the task i.e. by providing final artwork for the deliverable **(Figure 33)**.

Based on the settings done by the admin the contributors are allowed or not allowed to click on the breadcrumb links provided on the task response screen and traverse to the deliverable, project and brief screens. As the contributor is traversing from the perform mode, all information is shown in the read-only format, irrespective of the user role of the logged in user.

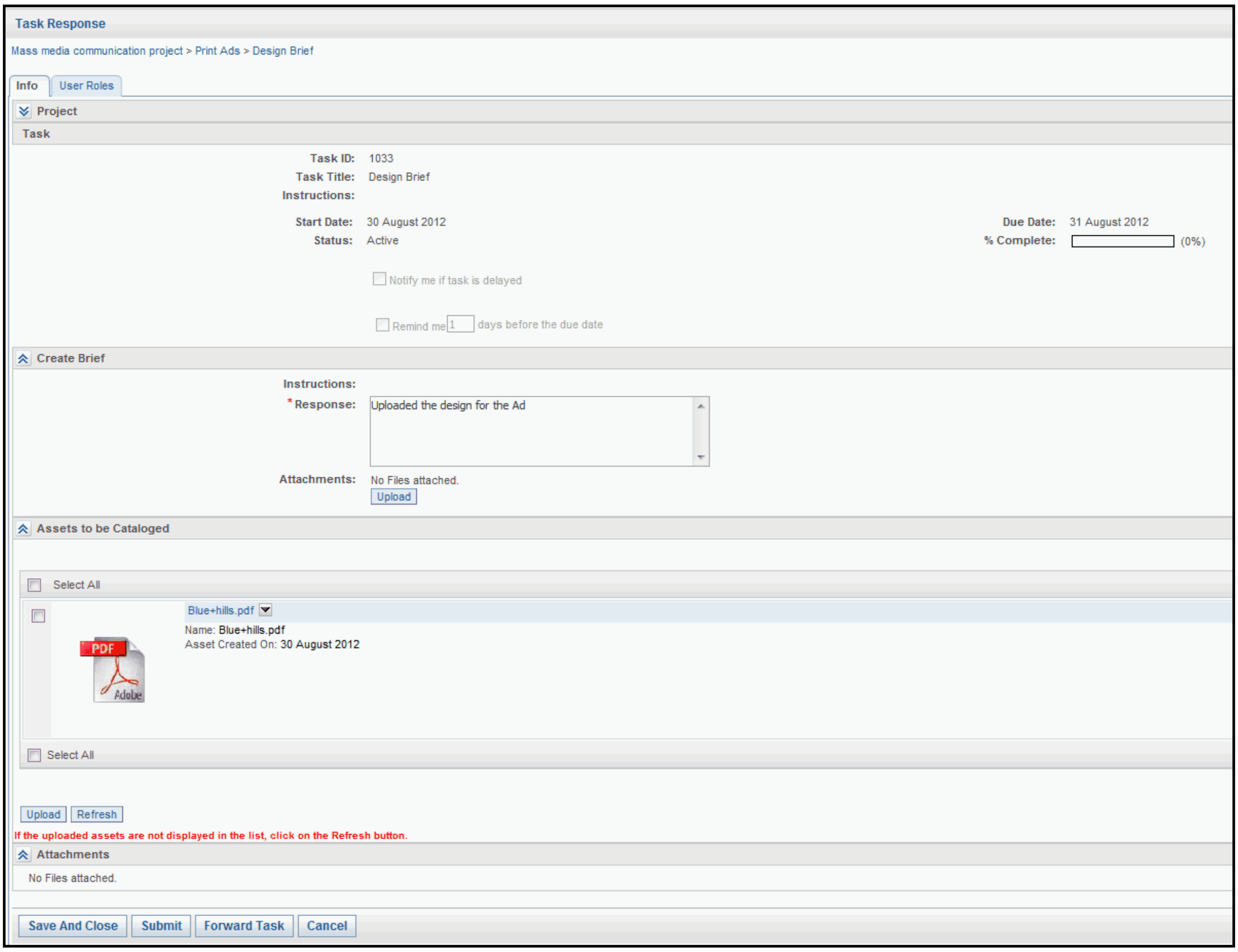


Figure No.33

The contributor of the task can attach files and put in their response. The project and deliverable details can be viewed depending on the settings done by the task initiator. The task contributor can forward the task to another contributor if required.

After a route task has been completed the initiator can view a consolidated document with the comments of all the reviewers. The system consolidates the comments from all the documents uploaded by the reviewers and saves it as a 'Consolidated Word document'.

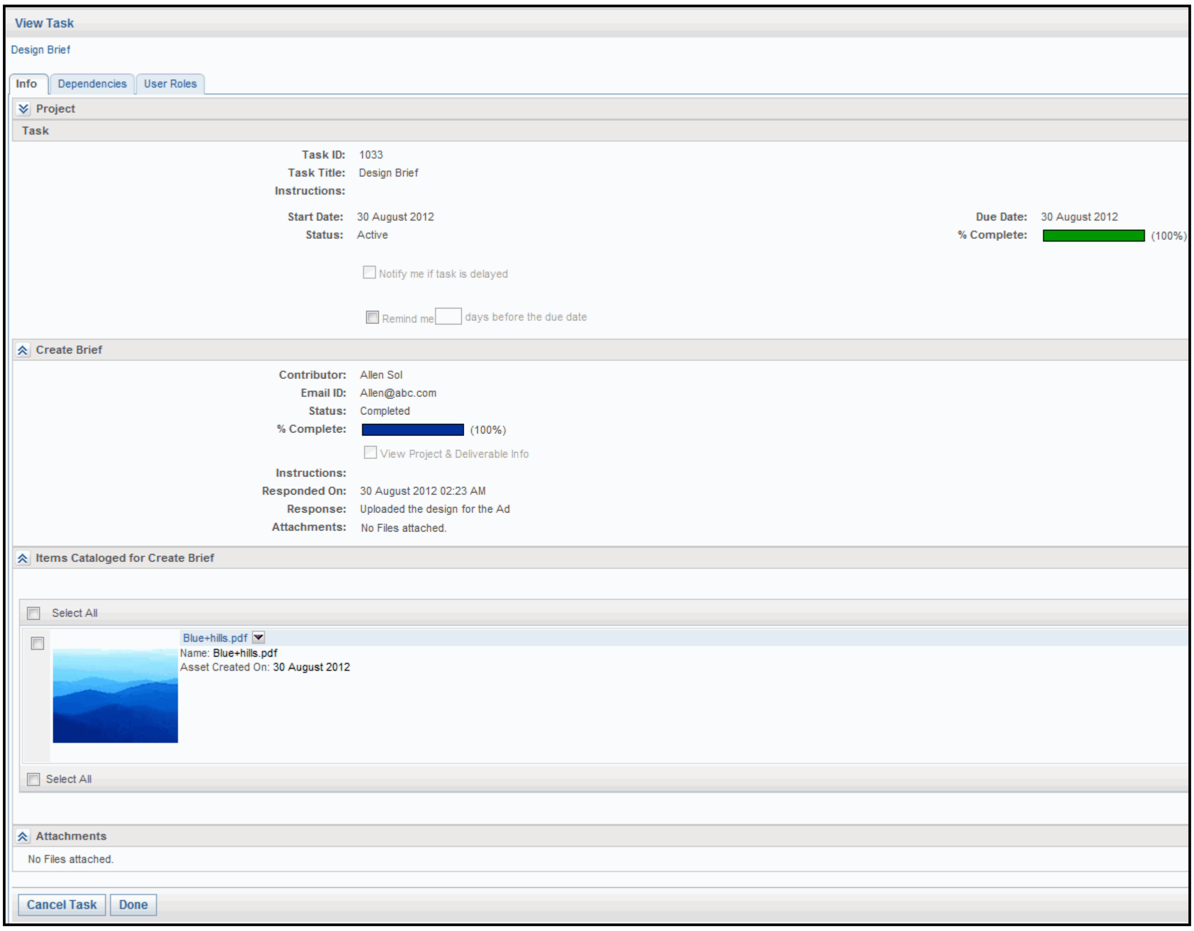


Figure No.34

While performing an Assignment Task **(Figure 34)**, the contributor for the assignment tasks needs to enter all the details, upload any file if required by clicking on the '**Upload**' button to upload the artwork.

An upload digital asset screen is displayed where the contributor can upload the original, preview and the thumbnail. The expiry date and the business information for the asset can also be provided. Save the uploaded asset.

After uploading the artwork the thumbnail will be displayed on the task response screen. Submit the task by clicking on the '**Submit**' button.

Note: The assets uploaded here can be cataloged into the Digital Library through the 'Digital Assets' tab on the Deliverable screen. See Section 6.9.6.

After all the tasks are completed the Deliverable Manage can mark the Deliverable as complete by going to the Deliverable info tab and changing the status to complete. Similarly the project can be marked as completed by changing the status of the project as complete on the project info tab. Once the deliverable/project is marked as complete, they cannot be opened again.

Marketing Workbench Reports

Marketing Workbench Reports display a list of configured reports. To launch the reports click on '**Reports**' on the Dashboard screen under MOM. By default the Strategic Planner reports are displayed. To view the Marketing Workbench reports select '**Marketing Workbench**' from the left pane. The following reports are displayed **(Figure 34)**:

Figure No.35

1. Contributor Information
2. Marketing Process Efficiency Analysis
3. Project Details
4. Project List

Once the reports are generated the user can export the reports in Word, PDF or Excel.

Resource Planner

As a Marketing Manager who plans marketing programs and activities, it's imperative to be able to request for and book Resources both to ensure that the Activities are carried through successfully. The Resource Planner product in SAS Marketing Operations Management allows the Marketing Manager, to plan resource requirements in advance for the marketing activities scheduled for the year.

You may send resource requests per activity to the Resource Manager who manages the resources. The Resource Manager or Category Head can assign resources as per your requirements taking into consideration current allocations of resources.

As a Resource Manager, you can view the allocations and availability of your resources through the year and assign them optimally to marketing activities as required.

User Roles

- **Marketing Manager** – Responsible for the planning and execution of Projects.
- **Resource Category Head** – Responsible for the Allocation and Monitoring of Resources.
- **Resource Category** – A group of resources having similar skils.
- **Resources –** Team Members involved in the execution of Projects.
- **Admin** – Responsible for the Configuration of the Application

Getting Started

To launch Resource Planner click on the '**Resource Planner**' link provided on the Dashboard screen on the left task pane (MOM).

Depending on your access rights i.e. whether you are a Marketing Manager or a Resource Category Head, the Resource Request and/or Resource Allocation view is displayed by default.

1. **Resource Request** – This tab is visible only to the Marketing Managers who request for resources for a particular plan/program/activity.
2. **Resource Allocation** – This tab is visible to the Resource category Head who allocates the resources requested by the Marketing Manager.

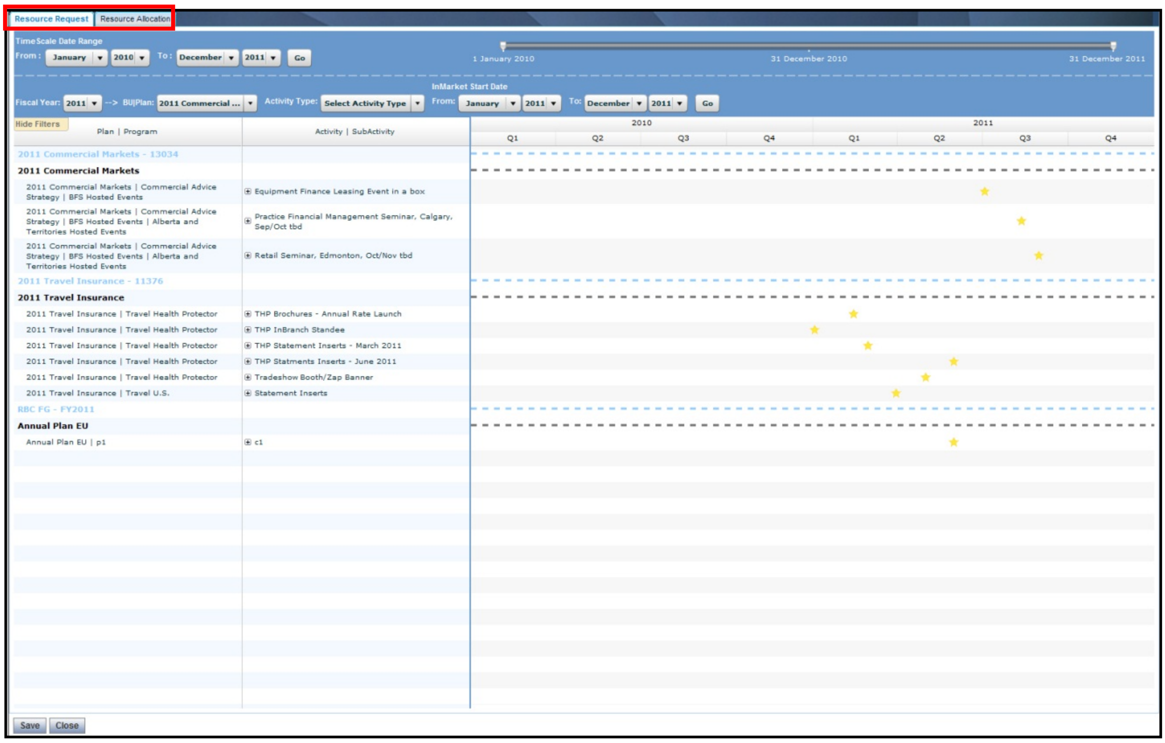


Figure No.1

Resource Request

Users of the SAS Marketing Operations Management system can be named as Resources and assigned to various Activities or Projects. Resource Management allows Resources to be created, managed and assigned by a Resource Category Head, who is in charge of a group of Resources. Resources may also be marked as obsolete if they are no longer required as a resource in the system. For example, if individuals leave the organization or move out of certain named roles, you likely want to mark them as obsolete resources. This means that the resource will continue to be seen in the system as an obsolete resource for past assignments, but will no longer be selectable as a named resource for any future assignments. The Resource Category Head can choose to mark an obsolete resource as an active resource on a later day, if needed.

Search and Select Activities to Book Resource Requests

Figure No.2

The top bar **(Figure 2)** contains the filters using which the Marketing Manager can request for a resource for a particular plan/program/activity:

1. The time scale date range can be changed by selecting the months and clicking ‘**Go**’.
2. The slider allows you to view the activities in a particular date range.
3. Select a Fiscal Year based on which the Business Unit/Plans are populated in the list box. One or more Business Units/Plans can be selected. You may filter based on Activity Type and In Market Start dates.

Figure No.3

4. The Activity Type can be selected.

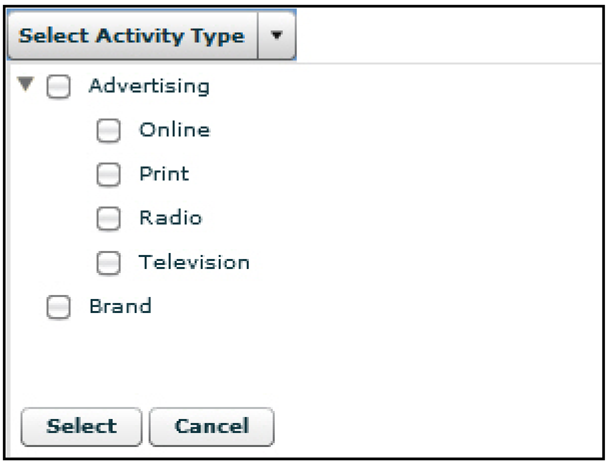


Figure No.4

After selecting the above filters click on the '**Go**' button. Based on your selections and filters, the Plans/Programs/Activities are displayed in the view below.

Book Resource Categories

Hide Filters Path	Activity
2011 Commercial Markets - 13034	
2011 Commercial Markets	
2011 Commercial Markets | Commercial Advice Strategy | BFS Hosted Events	⊞ Equipment Finance Leasing Event in a box
2011 Commercial Markets | Commercial Advice Strategy | BFS Hosted Events | Alberta and Territories Hosted Events	⊞ Practice Financial Management Seminar, Calgary, Sep/Oct tbd
2011 Commercial Markets | Commercial Advice Strategy | BFS Hosted Events | Alberta and Territories Hosted Events	⊞ Retail Seminar, Edmonton, Oct/Nov tbd
2011 Travel Insurance - 11376	
2011 Travel Insurance	
2011 Travel Insurance | Travel Health Protector	⊟ THP Brochures - Annual Rate Launch
	Select Category
2011 Travel Insurance | Travel Health Protector	⊟ THP InBranch Standee
	Senior Managers (1)
	Select Category
2011 Travel Insurance | Travel Health Protector	⊞ THP Statement Inserts - March 2011
2011 Travel Insurance | Travel Health Protector	⊞ THP Statments Inserts - June 2011
2011 Travel Insurance | Travel Health Protector	⊞ Tradeshow Booth/Zap Banner
2011 Travel Insurance | Travel U.S.	⊞ Statement Inserts
RBC FG - FY2011	
Annual Plan EU	
Annual Plan EU | p1	⊞ c1

Figure No.5

The Activity Path is displayed in the first column and the Activities are displayed in the second column. **(Figure 5)**. For Activities/Sub Activities where Resources are already assigned, they can be expanded to view the selected resource categories **(Figure 6)**. The Gantt like view on the right indicates the allocation of the resource. The following colors and symbols indicate:

- **Grey** – Resources requested, not allocated yet
- **Green** – Resources requested and complete allocation
- **Orange** – Partial allocation of requested resources – some pending allocations
- **Star** – In Market start date of the Activity

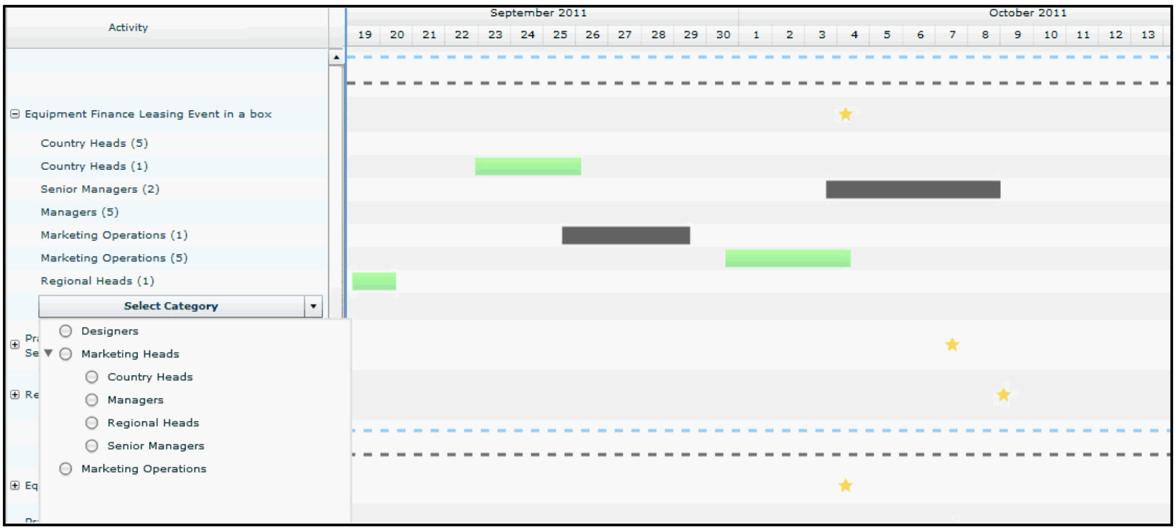


Figure No.6

To Request for a new Resource Category for an Activity, drop down, '**Select Category**' for a Program/Activity and select a Resource Category from the configured set of Categories in the system.

Note: For configuring Resource Categories and Resources in the system, refer to the admin guide for SAS Marketing Operations Management 6.0 release 14, Resource Management in the '**Tools**' section.

After a resource category is selected, a blue line appears in the column on the right.

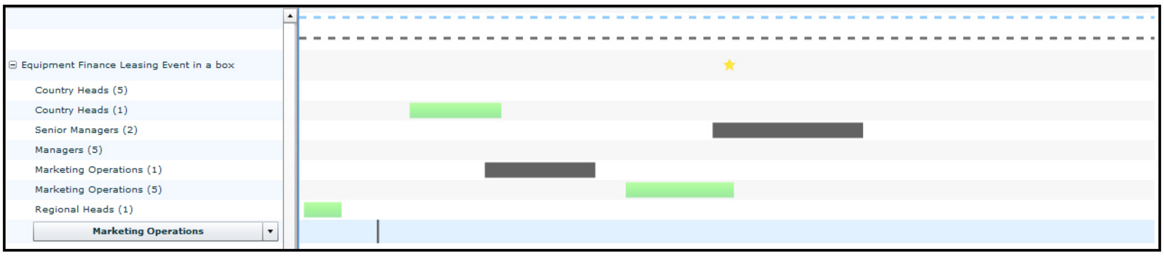


Figure No.7

Click on the blue line from the required start date of that resource category and drag the mouse to the end date to choose to request the resource category for that Activity for the selected date range. This selection is seen in grey within the blue line.

An allocation Popup is displayed with Start and End Dates marked by the grey line. The number of resources requested for that category needs to be entered **(Figure 8)**.

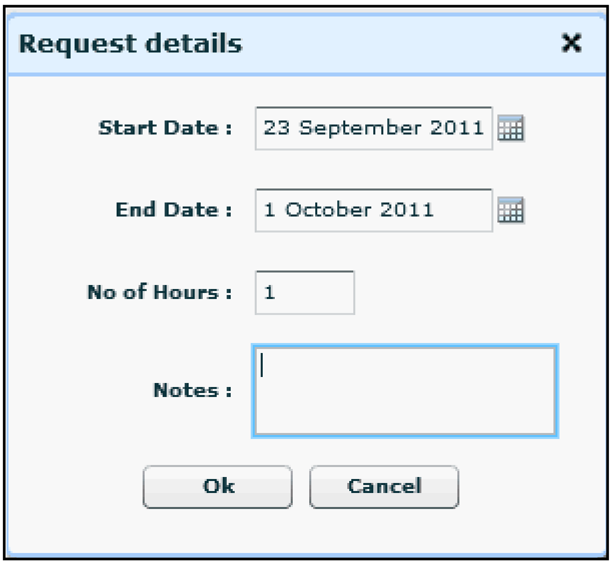


Figure No.8

Click on the ‘**Ok**’ button. A resource request is sent to the resource category head.

Resource Allocation

Once a resource request is received from the Marketing Manager, as a Resource Category head you can allocate the required resources through ‘Resource Planner – Resource Allocation tab’. If a certain resource has been marked as obsolete they cannot be allocated for any activity.

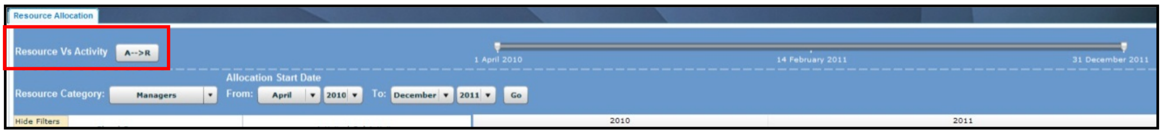


Figure No.9

Search unassigned activities

The top bar **(Figure 9)** contains the filters using which you, the Resource Category Head can allocate a resource for the request sent by the Marketing Manager for a particular plan/program/activity:

1. The time scale date range can be changed using the slider to view the activities in a particular date range.
2. The Resource Category can be selected, if you are the Resource Category Head for several categories.
3. You may also filter by Allocation Start Date range – From and To dates
4. By default you can view Resources by Activities i.e. which activities are the resources belonging to this category working on. A switch view allows you to view an Activity by Resources view i.e. who are the resources working on an activity.

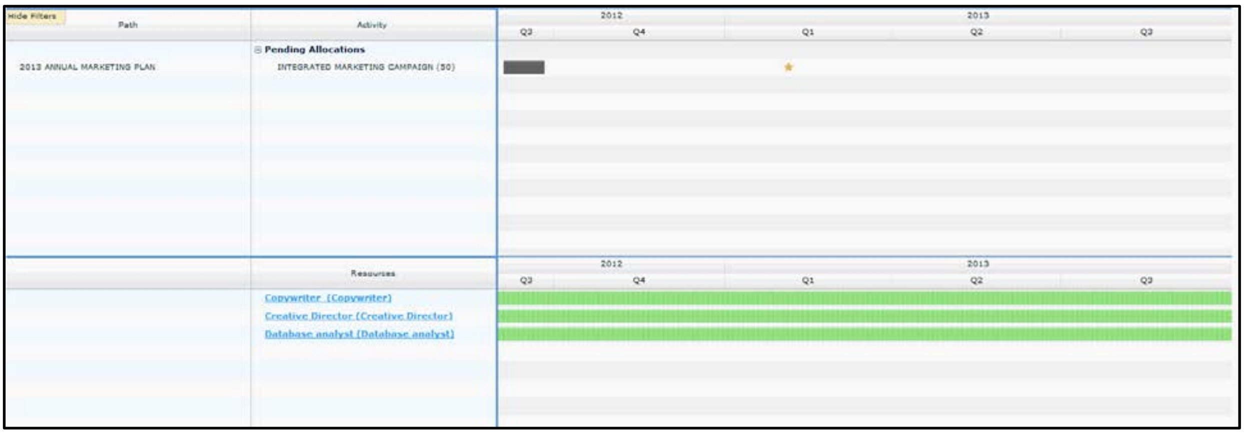


Figure No.10

The unassigned tasks appear in the list on the top half of the screen and the request appears as a grey bar in the Gantt like view. The lower half of the screen shows the current allocations and availability of the resources belonging to the selected Category.

Assign Resources

Click on the grey bar to select and assign resources from the available set of resources. An resource allocation popup is displayed where the resources can be selected. One or more resource can be selected and the allocation can be entered in hours per week.

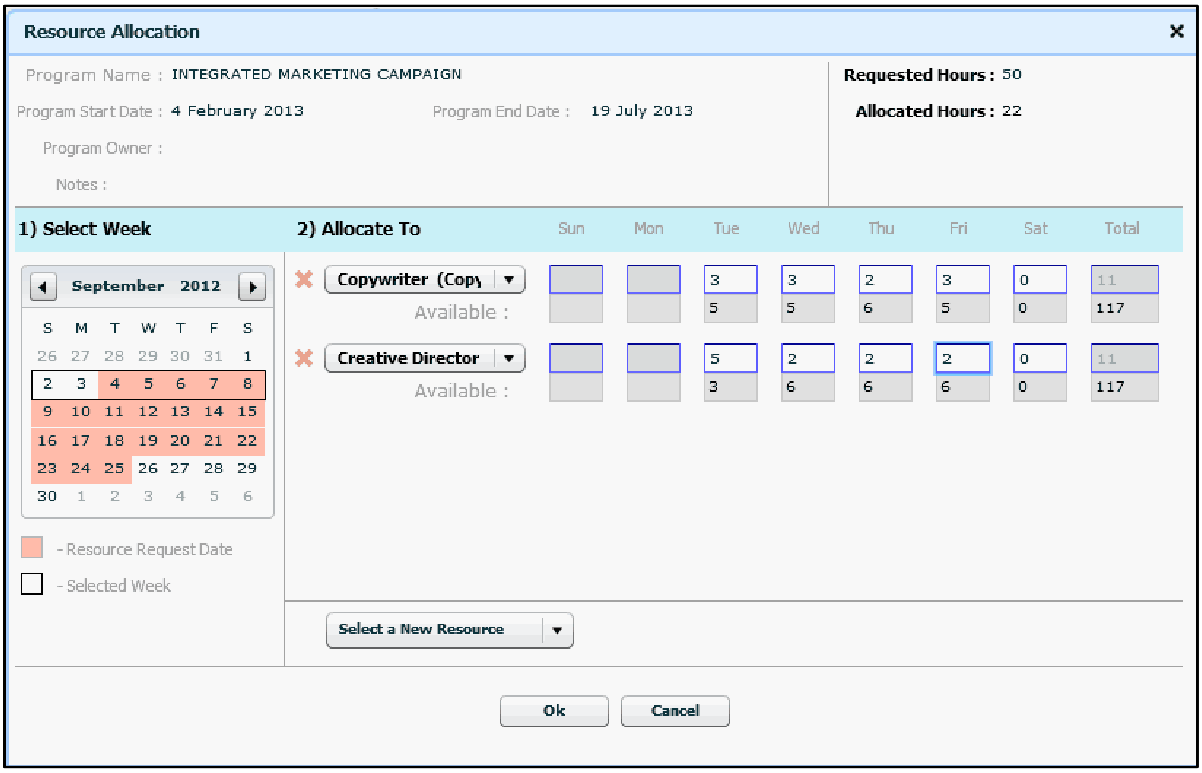


Figure No.11

After allocating the resources for the request click on the ‘**Ok**’ button.

Once the resources are assigned to the Activity, the Activity name appears against the name of the resource selected for the duration of the allocation. The following colors indicate:

- **Grey** – Unassigned
- **Orange** - Indicates the resource is partially assigned – less than 100%
- **Blue** - Indicates that the resource is completely booked – 100% assigned
- **Red** – Indicates the resource is overbooked – more than 100% allocation

Note: As a Resource Category Head, you may choose to un-assign and/or reassign activities to other resources depending on the requirements.

Marking a Resource Unavailable

To mark a resource as unavailable, click on the name link of the resource **(Figure 10)**. The resource details are displayed on the popup. Mark the dates the resource is unavailable and give the reason. Click on '**Ok**' to save the details **(Figure 12)**.

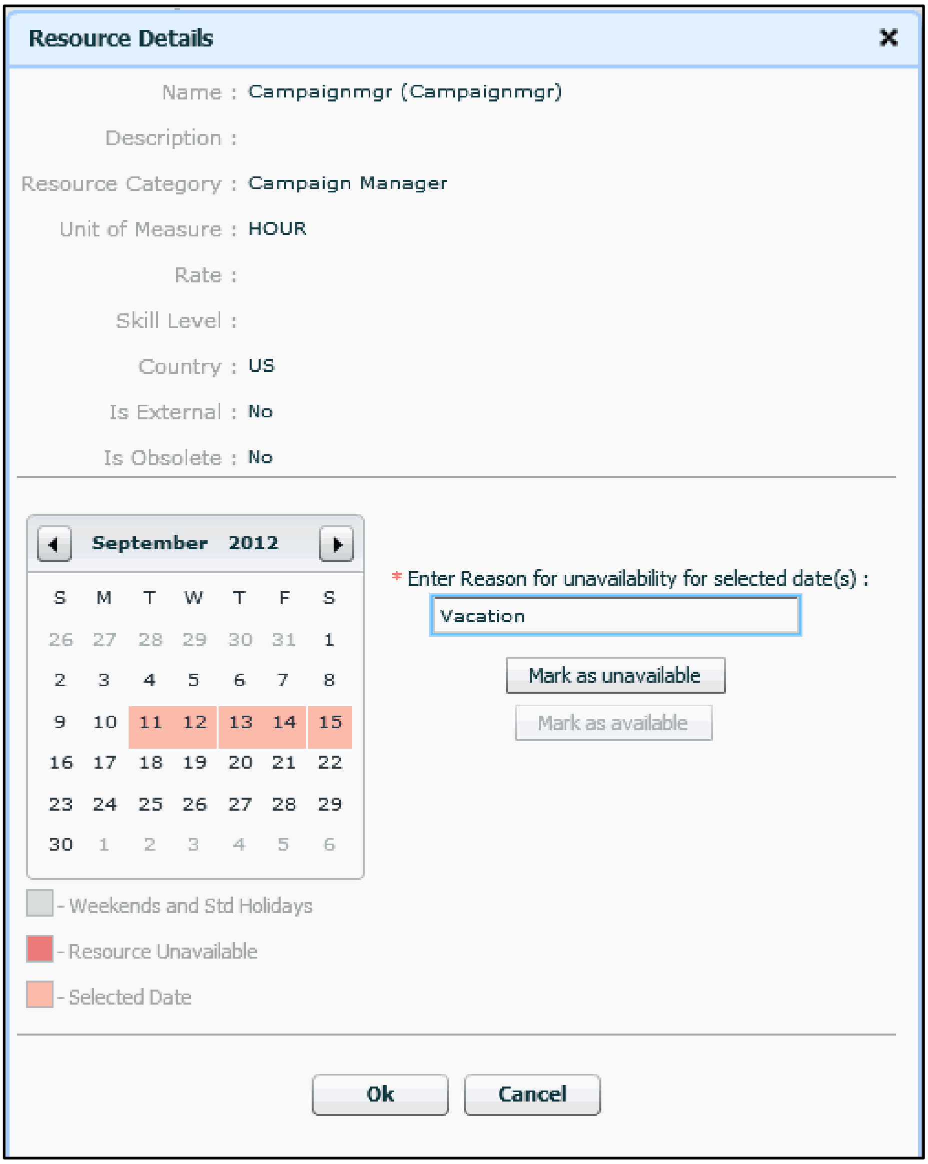


Figure No.12

Resource – My Tasks Calendar

As a valuable resource of a marketing organization, you need to be appraised of the Marketing Activities to which you are allocated through the year and plan your time accordingly. You may view your allocations in a My Tasks Calendar in SAS Marketing Operations Management.

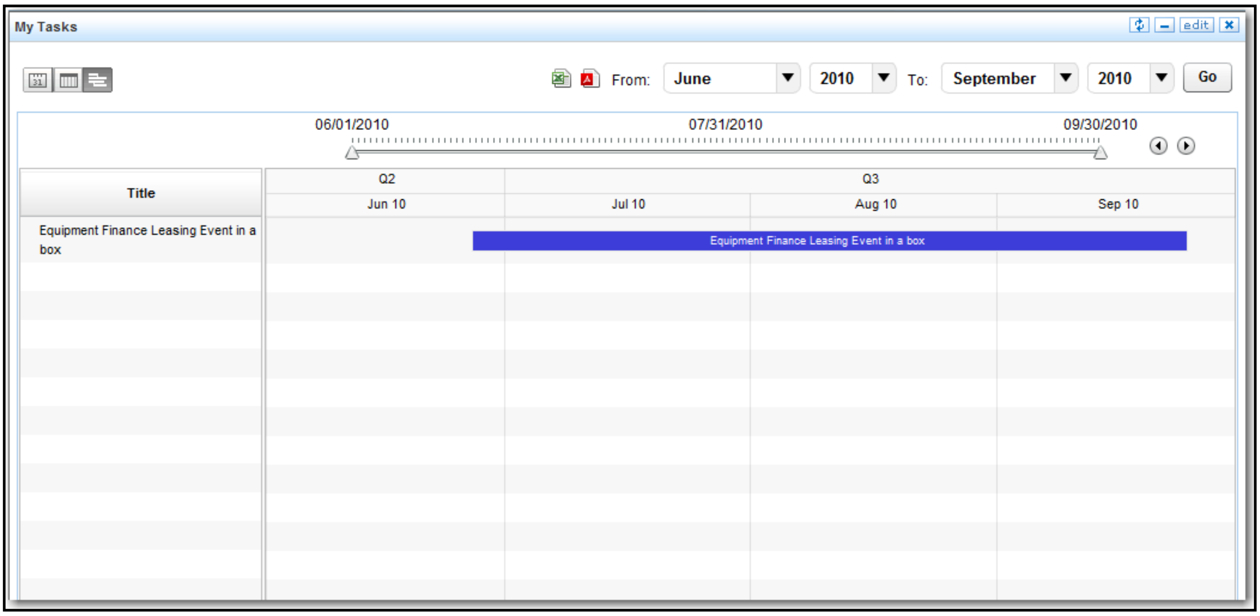
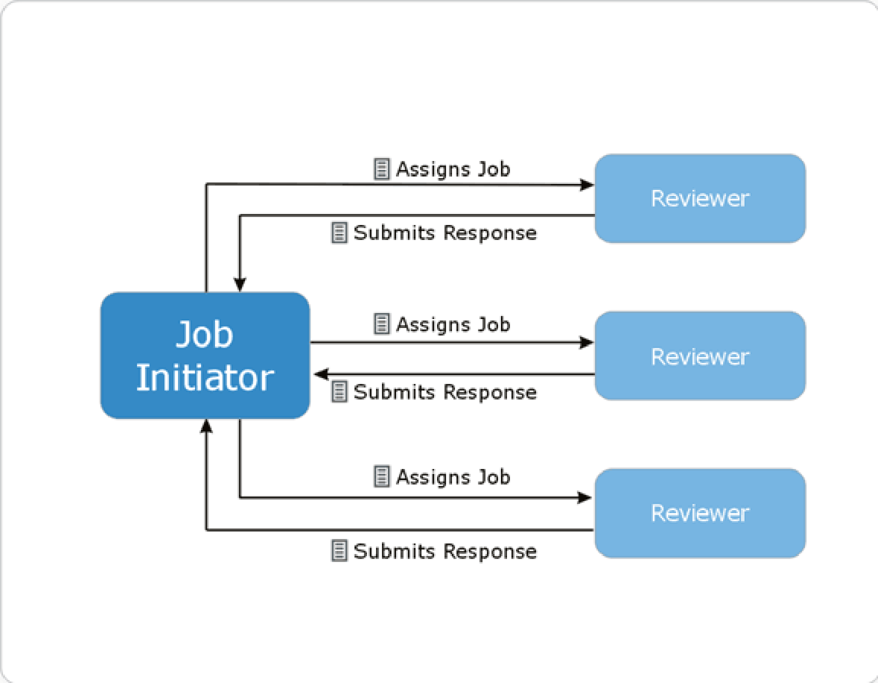


Figure No.13

Approvals

Overview



SAS Marketing Operations Management's Approvals electronically routes files for review and approval. The reviewers can examine the file; provide comments and annotations using standard tools such as Adobe's Acrobat, MS-Word (.doc, .docx), MS-Excel (.xls, .xlsx) and Flash 10.3.183.11. The application displays the status of the route, automatically reminds reviewers of pending deadlines and tracks the comments of the reviewers across multiple revision cycles of a file.

Glossary of terms

- **Job -** Job is a document that passes through a specific route for approval in the organization.
- **Routes** - Route is the specific path through which the document will be sent for review until it is approved. Route specifies the reviewers of that job and route method specifies whether the review will be done sequentially or simultaneously.
- **My Routes -** My Routes are the routes that the user can save for an approval job. Along with the name of the reviewer the user can also store the instructions given per reviewer, the step title and the duration for each step. The saved route can be used in another Approvals Job.

Review Cycle in Approvals

- **Document/Video submission**: With the help of approvals, the initiator can route a document/video to a list of reviewers and provide instructions for individual reviewers.

- **Document/video review**: The reviewer receives an e-mail notification regarding the availability of the document/video for review. After the review is done, the user submits the document/video with the comments.
- **Automatic reminders**: The application tracks the status of route during the course of the review cycle. If the time specified by the initiator lapses, the application automatically sends an e-mail reminder to the reviewer. If the reviewer still does not respond, a notification is sent to the initiator, who could skip the reviewer.
- **Multiple revisions**: The user can create multiple revisions of document/video. The application tracks these multiple revisions resulting from the proposed changes made by the reviewers.

Roles in Approvals

The following are the roles involved in an Approval cycle:

- **Job Initiator** – The user who creates the job and initiates the review.
- **Reviewer** – The user who is chosen by the initiator to review the document/video and provide comments.
- **Reader** - The user who is chosen by the initiator to read the reviews but not provide any review comments.

Getting Started

After signing in, click on the '**Approvals**' link provided on the Dashboard screen on the left pane (MOM). The application is launched **(Figure 1).**

Figure No.1

Left Pane: The left pane is divided into sections providing users with functionality related to approvals. The sections are:

- **Approvals** – Has the following links:
- **My Approval Jobs** – Shows the user the jobs that have been initiated by the user.
- **My Reviews** – Shows the pending jobs of the user.
- **My Routes** – The list of routes created by the user can be viewed.

Content Frame: By default it displays the screen where the user can view and search for jobs. The user can also create/delete jobs.

Creating Approval Jobs

On clicking '**My Approval Jobs**' a screen with a search facility is displayed. The user can search for specific jobs by specifying the search criteria such as status, start and due date and the job title contains (keyword) and clicking on the '**Search**' button **(Figure 1)**. The result will be displayed in the job list.

Each row in the job list shows details such as job name, status (new, active, in active, draft, in progress or completed), revision, start and due date and %complete. Each job name has a link to modify the job details based on the status of the job. If the job status is in active or completed the job cannot be modified. Based on the configuration, which can be set by the system administrator the user can either delete jobs with any status/state or just can delete jobs, which are in the new/draft state.

Creating a New Job

Select the job type and click on the '**Create Job**' button at the bottom of the screen **(Figure 1)**. Two type of jobs can be created:

1. Approvals Job – In this kind of job only one file can be routed for approval.
2. Multi-File approvals job – In this kind of job multiple files of different formats can be routed for approval.

The User Interface for both the type of approvals job is similar. The following **Figure 2** shows multi-file approval and **Figure 3** shows single file approval.

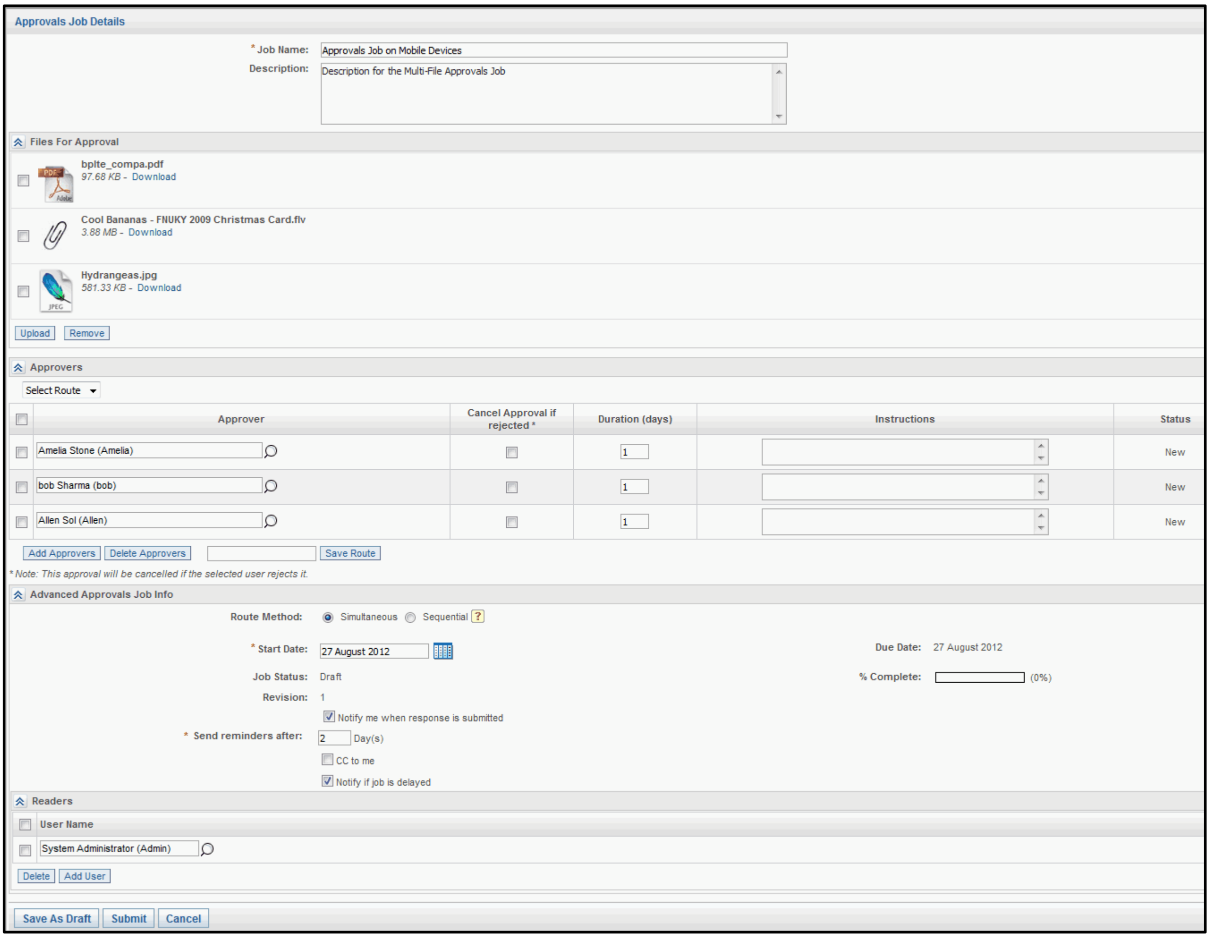


Figure No.2

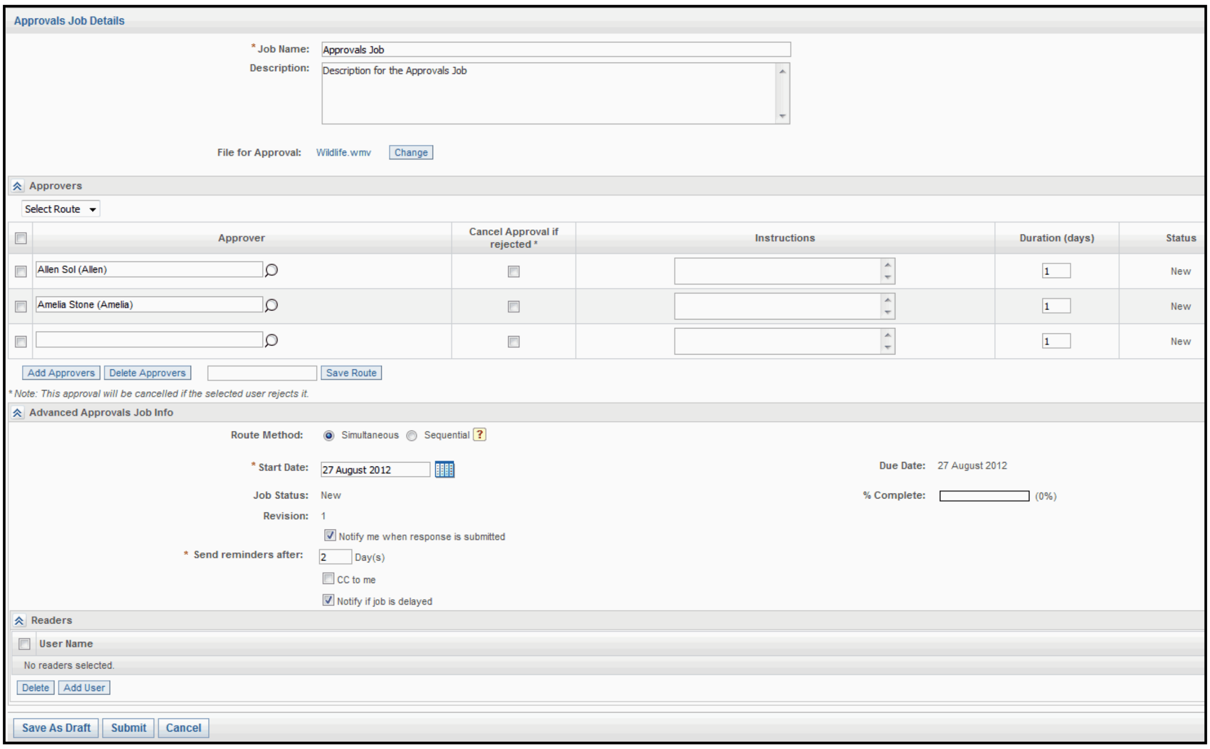


Figure No.3

The following sections are displayed on the screens above:

- **Approvals Job Details** – Details such as job name, description and the file (Document or video) for approval needs to be uploaded. For a multi-file approval multiple files can be uploaded.
- **Approvers** – In this section the approvers can be selected. An approvals route goes through several approvers or steps. There are two ways to add approvers:
  - Click on the '**Add Approvers**' button and select from a list of users.
  - Select previously saved route from '**Select Route**' list box at the left corner of this section.

  For each reviewer, the job initiator can give instructions and specify the number of days for the approval. If the job initiator wants to use the same set of approvers for future approval, the routes can be saved by giving a name and then clicking on the '**Save Route**' button. The selected approver can be deleted by clicking on the '**Delete Approvers**' button.

  Note: If the approver for whom the checkbox 'Cancel Approval if rejected' is selected rejects the job then that job will get cancelled irrespective of whether the other approvers have approved/rejected the job.
- **Advanced Approvals Job Info** – The route method can be selected as simultaneous or sequential. In the sequential route the approvers can review the document in a sequence only i.e. at any given time only one approver can review the document. In the simultaneous route, all the approvers can review the document simultaneously. The start date and the number of days after which the reminder has to be sent is entered. The due date, status and the %complete are also displayed.

  Select the following checkboxes to send e-mail notifications:
  - **CC to me**: Select this checkbox to make the initiator a CC recipient of all the e-mails that go to the approvers as job delay reminder.

- **Notify if job is delayed**: Select this checkbox to send notification e-mail to the job initiator, if the entire job is not completed within the specified time. Please note that this delay is not same as delay by one reviewer.

- **Readers** – In this section the readers for this route can be selected by clicking on the '**Add User**' button.
- **Save as Draft** - Save the new job as a draft, to be submitted later. In the job list this job is displayed with the status as 'Draft'.
- **Submit** - Submits the job. The job begins and email notifications are sent to the appropriate approvers to begin their review. In case of a sequential route the email also is sent sequentially to the approvers and in case of simultaneous all the reviewers in the route get the e-mail at the same time **(Figure 4)**.

SAS MOM notification

Following job has been assigned to you for your approval.

Please submit your approval in next 2 day(s).

Approvals Job (Due on 02 October 2009)

Description for the Approvals Job

This job was initiated by **Hemant Kirad.**

The Route method is **Simultaneous.**

*THIS IS A SYSTEM GENERATED E-MAIL. WE REQUEST YOU NOT TO REPLY TO THIS MESSAGE.

Figure No.4

- **Cancel** – Cancels the operation.

Note: There is support for associating facets to the job. The facet should be associated to the 'WORKFLOWPROCESS' entity and associated in the approvals package. Facets cannot be associated to the pre-defined steps for the Approvals Job process.

Creating a Multi-File Approval Job

An approvals job details screen is displayed where the user can upload multiple files of different formats.

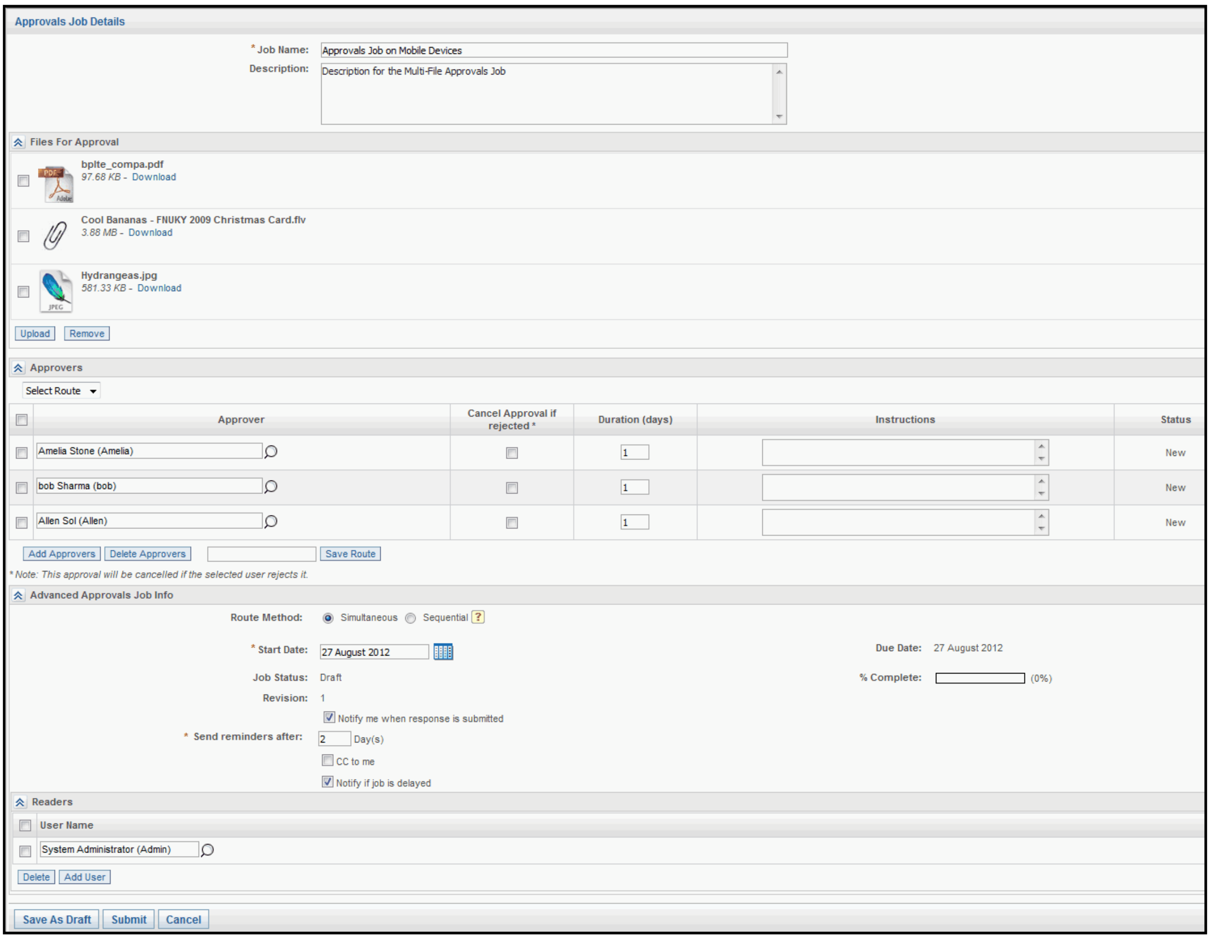


Figure No.5

Editing a submitted Job

After the job has been submitted the job initiator could go back to the job screen by clicking on the job name link **(Figure 1)**. A view job screen is displayed **(Figure 5)**. The following operations can be performed on this screen:

- **Cancel Steps**: Select the approver who needs to be deleted from this route and click on the '**Cancel Steps**' button.
- **Modify Job**: This option allows the job initiator to add more approvers for the job.
- **Terminate Job**: The job initiator can terminate (cancel) the job.

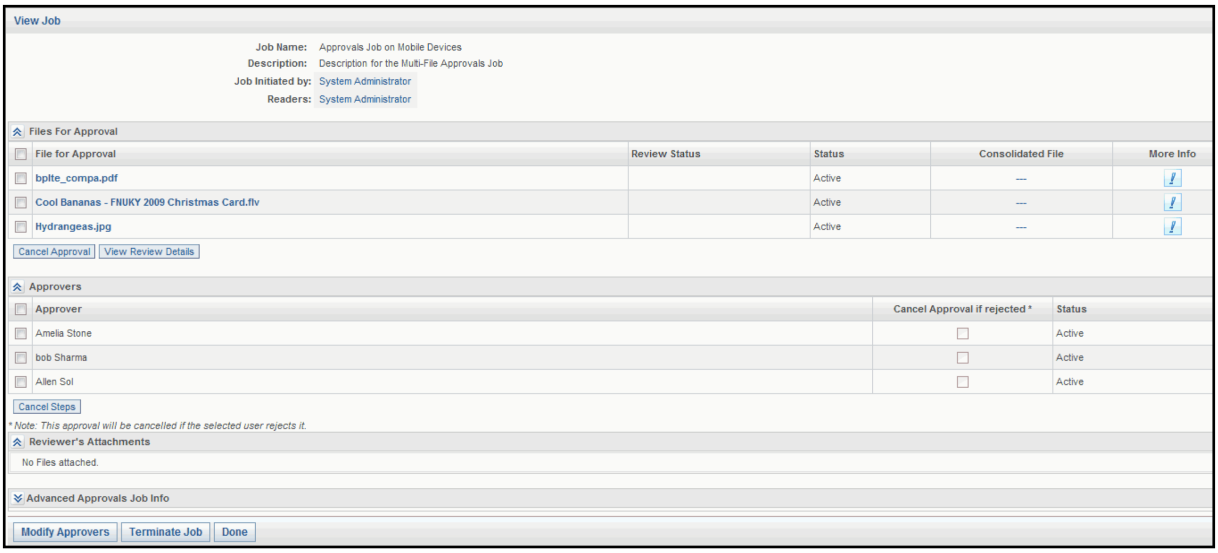


Figure No.6

Reviewing an Approval Job

Viewing Pending Jobs

Click on the '**My Reviews**' link provided on the left pane (Approvals). In the first section the user may search for a specific pending job by selecting the status, the start and due date and the job title contains then click on the '**Search**' button. In the second section a list of pending jobs are displayed. This is the list of active jobs, which the approver needs review and approve **(Figure 6)**.

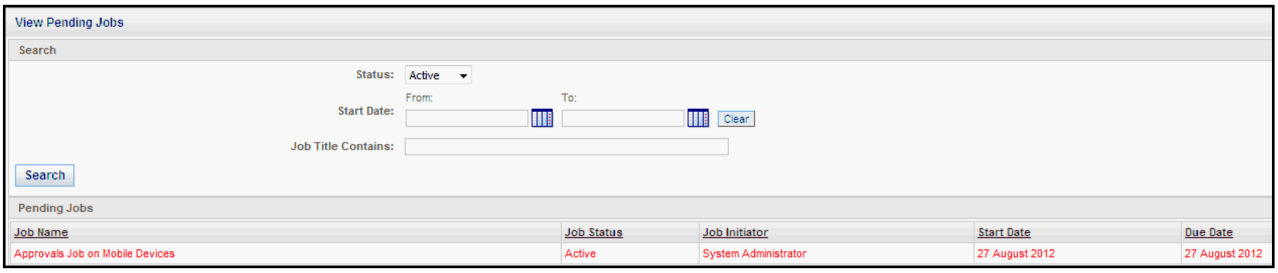


Figure No.7

Approving/Rejecting a Pending Job

The Reviewer can review the Job in the following ways:

1. Click the link received in an email **(Figure 3)**.
2. Click the job name link from the pending job list **(Figure 6)**.

An approve job screen is displayed wherein the details of the job are displayed in a read- only format **(Figure 7)**:

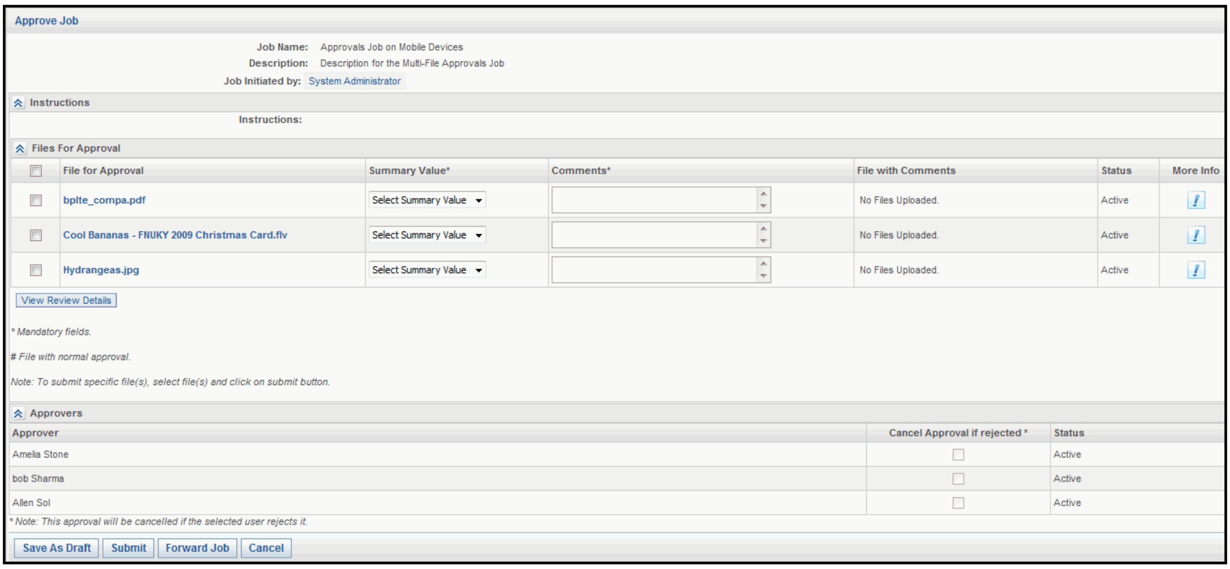


Figure No.8

The job information such as job name, description, job initiated by and the instructions are displayed in a read only format.

The file can be downloaded and reviewed and uploaded back. The summary can be selected as approved or rejected (if configured) and comments can be added. Then click on the '**Submit**' button to submit the job. The job can be forwarded to another user by clicking on the '**Forward job**' button and selecting the new approver.

Instructions can be provided for the approver.

By clicking on the 'More Info' icon on the right, the review can view the comments of other reviewers.

In case WebDAV is enabled:

With the help of WebDAV (Web based Distributed Authoring and Versioning) technology, reviewers can view the PDF for approval online and put their comments online and submit the approvals job.

As the reviewer clicks on the link of the PDF to be approved, it opens in the browser window, the Adobe Acrobat toolbar is present within the browser for commenting on the document.

Clicking on the '**Comment & Markup**' menu opens a new toolbar having two major options **(Figure 8)**:

1 **Save and Work offline**: The approver can work on the PDF offline and later upload the document with the comments on it by clicking on the '**Save and Work offline**' button. This allows the user to work on the file offline and put comments and then send it.

2 **Send and Receive comments**: After adding the comments click on the '**Send and Receive comments**' button to send the comments and close the browser. If the route is a simultaneous one and if another reviewer is working on the same file then the comments put in by one reviewer can be viewed by the other.

Click on the '**Submit**' button **(Figure 8)** to submit the job.

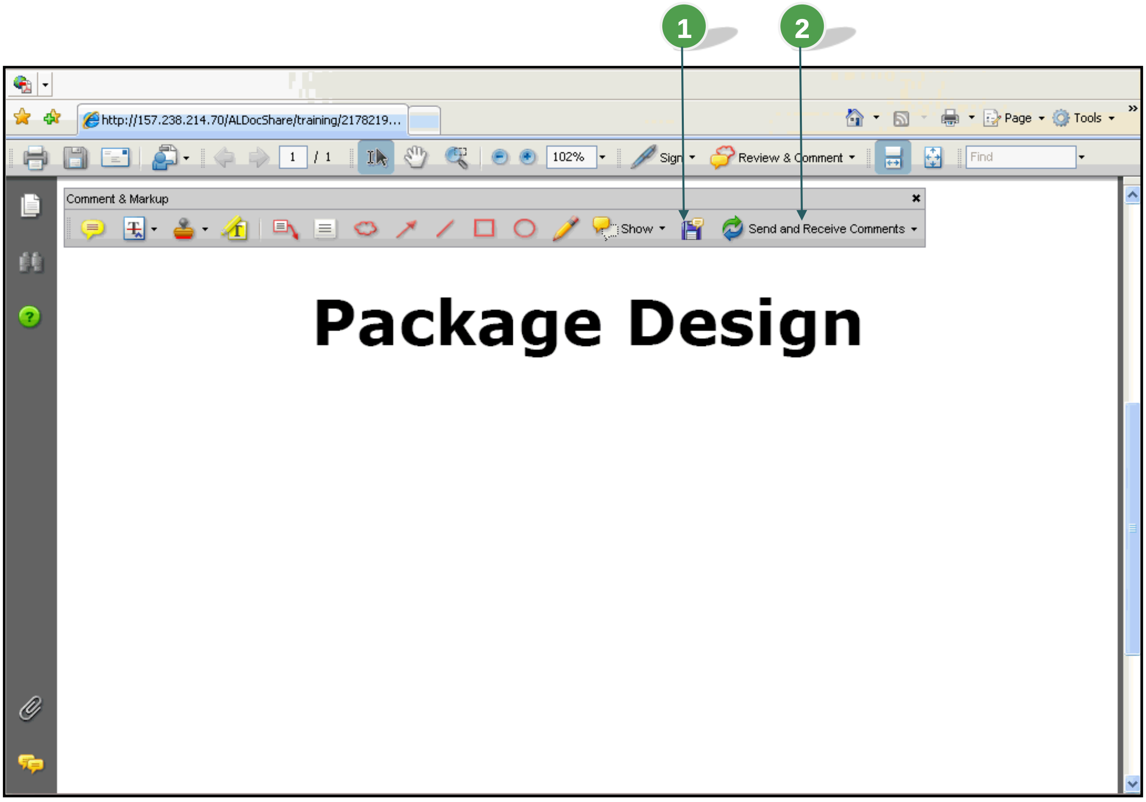


Figure No.9

Note: If '**~**' character is present in the filename of the uploaded file, then '**Send and Receive**' and '**Save and Work Offline**' buttons are not seen by default in the browser when the PDF file is opened by the approver. To enable these buttons, click on the Acrobat icon in the toolbar.

In case SAS MOM Annotations is enabled:

With the help of the SAS Marketing Operations Management tool, reviewers can view the files for approval online and put their comments online and submit the approvals job. The following file formats are supported by media approvals:

- Video Files:
  - FLV, WMV, ASF, MOV, AVI, MPEG, MPG
- Image Files:
  - PCX, TIFF, PCD, JPG, TIF, PICT, SGI, BMP, GIF, PNG, PSD, WPG, JPE, JPEG
- Documents:
  - PDF

When the reviewer clicks on the link of the files to be approved, the file is opened in a browser for commenting. The following actions can be performed on this screen **(Figure 9)**:

1 Clicking on this button the approver can put in comments.

2 Clicking on this button the approver can mark an area and put in comments.

3 Using these tools the approver can mark an area and strikeout text.

4 The approver can use the hand mode to scroll, zoom out and zoom in.

5 The names and photographs of the approvers will be displayed. If there are multiple approvers then the names and photographs of all the approvers will be displayed here.

6 A reviewer can like a comment made by another reviewer.

7 The initiator of the approval task will be able to see a list of comments with responses and also gather a vote on the number of approvers who agree with a comment.

8 A reviewer can reply to another's comment.

9 The approver can save the comments and send it later.

10 The approver can close the window.

11 The approver can download the file for reference.

As a reviewer/approver of an Artwork or PDF document, using the Media Approvals tool in SAS Marketing Operations Management, you can now comment, on whether you like the comment made by another approver. This could be used as a mechanism to harness votes on a comment. After the comments are entered the approvers can save the comments and submit the job by clicking on the '**Submit**' button **(Figure 9)**.

Note: The reviewer/approver can also comment on the previous approvers comments.

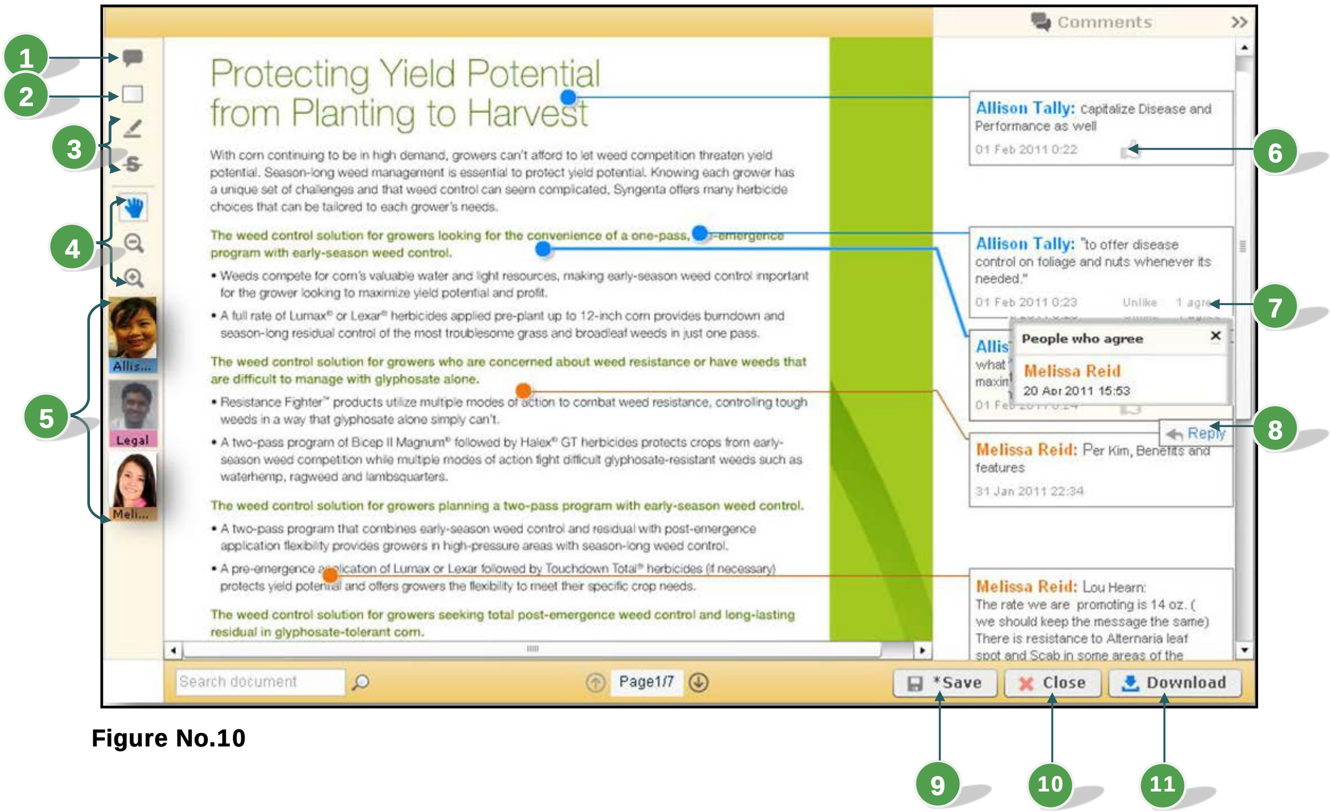


Figure No.10

Approving/Rejecting a video file

The users can initiate approval jobs for video files and submit the job. The reviewer of the video file can view the video file to be approved and add comments by clicking on the '**Add Comments**' button 1 using the following tools **(Figure 10)**:

2 The color of the text can be changed.

3 The size of the text can be increased or decreased.

4 Click on the '**Text**' button to type a textual comment for the slide.

5 A section can be marked using the pen tool.

6 A section can be marked using the frame tool

7 A comment can be erased by using the pointer tool

8 The comments entered by the user can be saved by clicking on the '**Save**' button.

9 The operations can be cancelled by clicking on the '**Cancel**' button.

10 The comments entered by the previous approvers can be viewed for a sequential job type by clicking on the '**View Comments**' tab.

Once all the comments are saved the response can be submitted. On completion of the job the user can view the consolidated file with all comments.

Figure No.11

Note: Whenever a reviewer submits their reviews, the job initiator receives an email notification.

In case of multi-file approval the job is completed only after all the files are approved.

Comparison between Media Annotations Tool and Adobe Acrobat

Media approval has not been designed to replicate Adobe acrobat functionality. This tool can be used by clients without investing in Adobe licenses. If complicated artworks are sent for approval, then Adobe should be used instead of Media Approvals.

Clients who are using approvals for legal review for documents, light weight PDF files, etc. can use Media approval. Some basic commenting tools are provided, so that for a simple use case, clients need not invest in Adobe licenses.

Feature	Media Annotations Tool	Adobe Acrobat
Large PDFs more than 5000 X 5000 pixels	X	✓
Annotations for Image files (eg. Jpeg)	✓	✓
Annotations to flat pdf's	✓	✓

Annotations to multi layered pdf's	X	✓
Text based pdf's	✓	✓
Edit pdf's online	✓	X
Online collaboration during approval	✓	X
Ability to Like another's comment	✓	X
Ability to have a reply to a comment as a threaded discussion	✓	X
Timestamp the comment of a user	✓	✓
Download the PDF with comments	✓	✓

Viewing a completed Job

After the job has been approved/rejected the status of the job changes to 'Complete'. The initiator can view the completed job by clicking on the job title link on the 'File I am seeking approvals for….' screen. A view job screen is displayed where the job details are displayed. Once the job is complete, the system consolidates the comments from all the documents uploaded by the approvers and then saves it as a consolidated word document. This Consolidated document can be then viewed by the Job Initiator **(Figure 11)**. A new revision of the job can be created by clicking on the '**Create New Revision**' button. While creating a new revision the reviewers are taken by default, new reviewers can be added or the previous ones can be deleted. The files for approval are not carried forward but new files can be uploaded. Import notes from the Word document can also transferred while creating revisions of approval jobs.

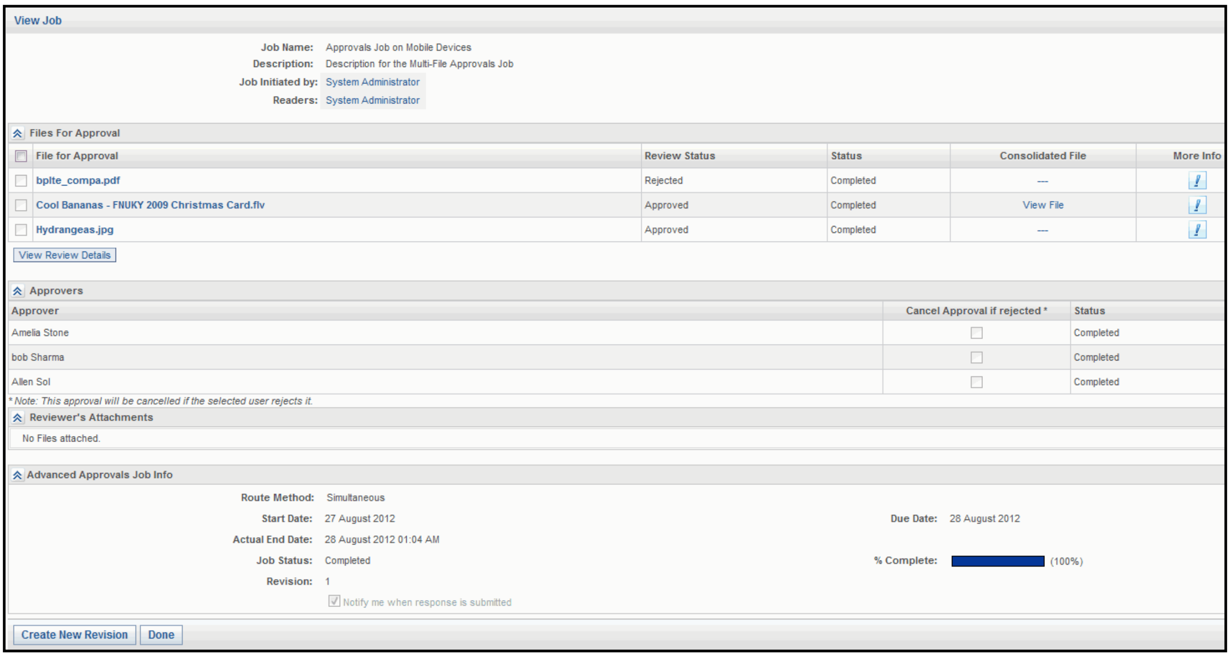


Figure No.12

My Route

Viewing Routes

These are the pre-defined routes, which can be used to define Reviewer Information at the time of creating a route. It also helps in reuse of commonly used list of reviewers. Routes are displayed in the Select Route list box. Click on the '**My Route**' link provided on the left menu (Approvals). A view my routes screen is displayed with a list of routes **(Figure 12)**. By clicking on the name link of a particular route the user can edit the route details.

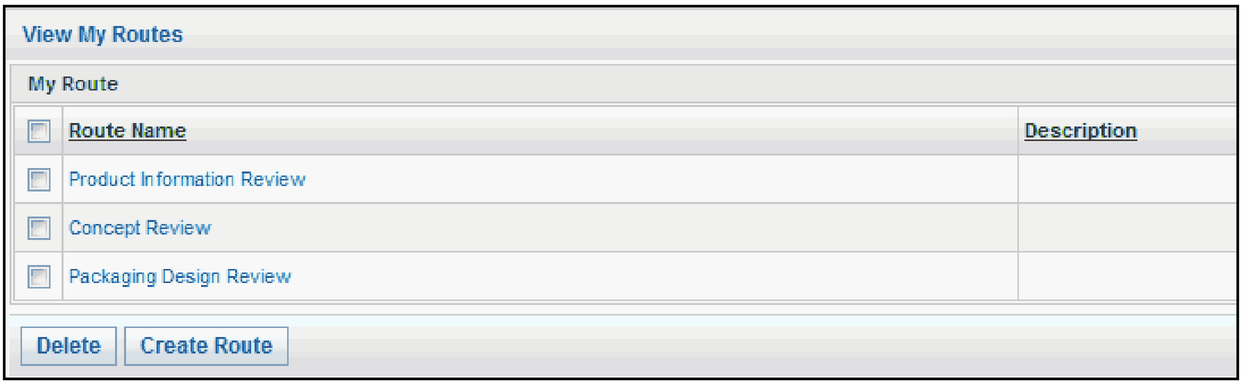


Figure No.13

Creating a New Route

Click on the '**Create Route**' button at the bottom of the view my routes screen **(Figure 12)**. A create route screen **(Figure 13)** is displayed wherein details such as:

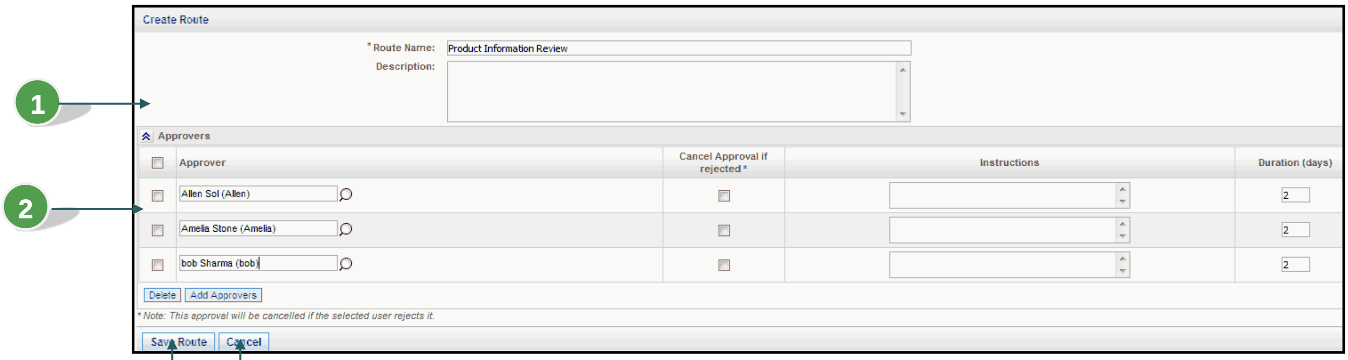


Figure No.14

1 **Route Name and Description** - Route name and description can be entered.

2 **Approvers** - Select the approvers by clicking on the icon for this route or by typing in the first letter of the user. Give instructions for each approver and enter the duration allocated for review for each approver.

3 **Save Route** – Saves the routes.

4 **Cancel** – Cancels the operation.

If more approvers need to be added click on the '**Add Approvers**' button **(Figure 13)**.

Approval Reports

This report displays a list of approval jobs initiated by users.

To view approval reports click on the '**Reports**' link on the left pane of the dashboard screen under MOM.

Lists of existing reports for the Strategic Planner module is displayed by default. To view the approvals reports click on the '**Approvals**' link.

Figure No.15

The following report is available for Approvals:

Approval jobs: Here the user can add the filters and generate the reports for the approval jobs **(Figure 13)**.

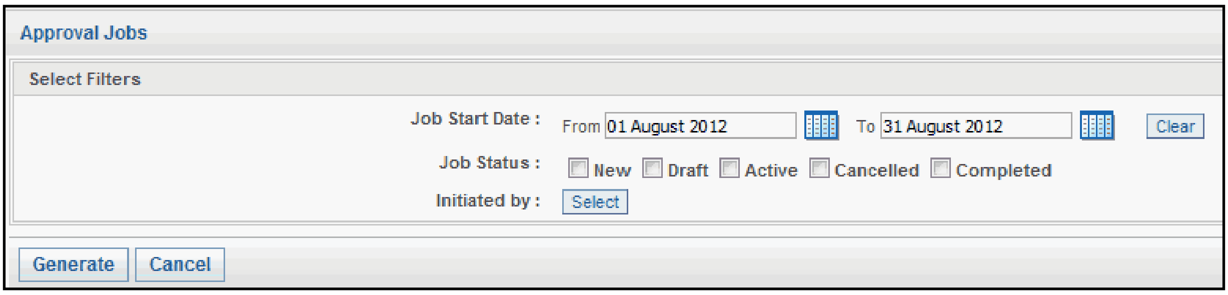
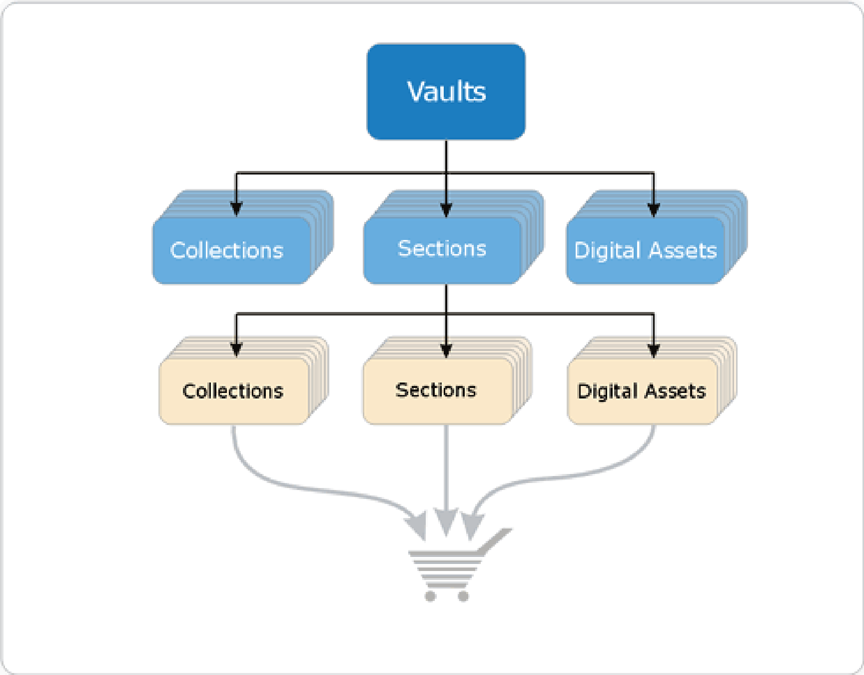


Figure No.16

Once the report is generated the user can export the report in Word, PDF or Excel.

Digital Library

Overview



The Digital Library organizes digital assets related to packaging graphics, sales brochures, point-of-purchase, advertising and various communications resources in a centralized, secure repository called a digital asset manager. The users can search, browse and retrieve and link these digital assets for use through any web browser. Digital Library also has a functionality of Publishing DAM content to third party software through Web Service Interface.

Glossary of Terms

Digital Asset - A digital asset is any form of content and/or media that have been formatted into a binary source, which include the right to use it. Digital assets are categorized in three major groups, which may be defined as textual content, images and multimedia. For e.g. logos, photos, marketing collateral, documents, and multimedia files.

Digital assets consist of:

- Original files (raster or vector graphics, video, text, etc.)
- Preview file (optional) - A preview is a low-resolution image of the original digital asset. For example Acrobat PDF previews of an Illustrator file.
- Thumbnail file (optional) – A very small image of the digital asset that is viewed along with the item information to help identify the item, in JPEG format.

No special tools such as Illustrator or Corel Draw are needed to view the previews and thumbnails.

Digital Asset Manager - Digital asset manager allows the process of storing, retrieving and distributing digital assets in a centralized and systematically organized system, allowing for the quick and efficient storage, retrieval, and reuse of the digital files that are essential to all businesses.

Digital Library - Digital library contains vaults, sections, collections and assets that are stored in a hierarchy.

Vault - Vaults are secure spaces on the file system where all the digital assets are stored. Digital asset manager can have multiple vaults. An organization might have a separate vault for each brand, operating company, business unit, division or department.

Section - A section is equivalent of a file folder within a vault or another section in the digital library. Sections exist within vaults and allow digital assets stored within a vault to be sub-divided into a logical hierarchy.

Cart - Cart is an area used for collecting items on which a user may want to perform specific operations. The items in the cart are a compilation of references to sections, collections and/or digital assets that reside in different sections or vaults in the digital library.

Collection - Collections are a compilation of references to digital assets that reside in different vaults or sections in the digital library.

Business Information - Business information is the metadata or information with which the digital assets are stored in the digital library. This metadata helps to uniquely identify each asset and helps in easy search and retrieval of the asset.

Batch Cataloger/Cataloging - Cataloging is the mechanism by which digital assets are imported into the database. There are two methods by which assets are imported into the database:

- Interactive Check-in – One asset is cataloged at a time.
- Batch Cataloging – Multiple assets are cataloged at a time.

The cataloger provides the user with a mechanism for setting cataloging preferences, submitting jobs and viewing the status of the jobs. While cataloging, the user catalogs the original file along with the preview and the thumbnail.

If the preview and thumbnail files are not cataloged along with the original file, the cataloger generates the thumbnails and previews (if possible) for easy viewing of items.

The user can specify the hierarchical structure to catalog the assets in the database.

Getting Started

After signing in click on the '**Digital Library**' link provided on the dashboard screen on the left pane to launch digital library. The following screen is launched **(Figure 1)**:

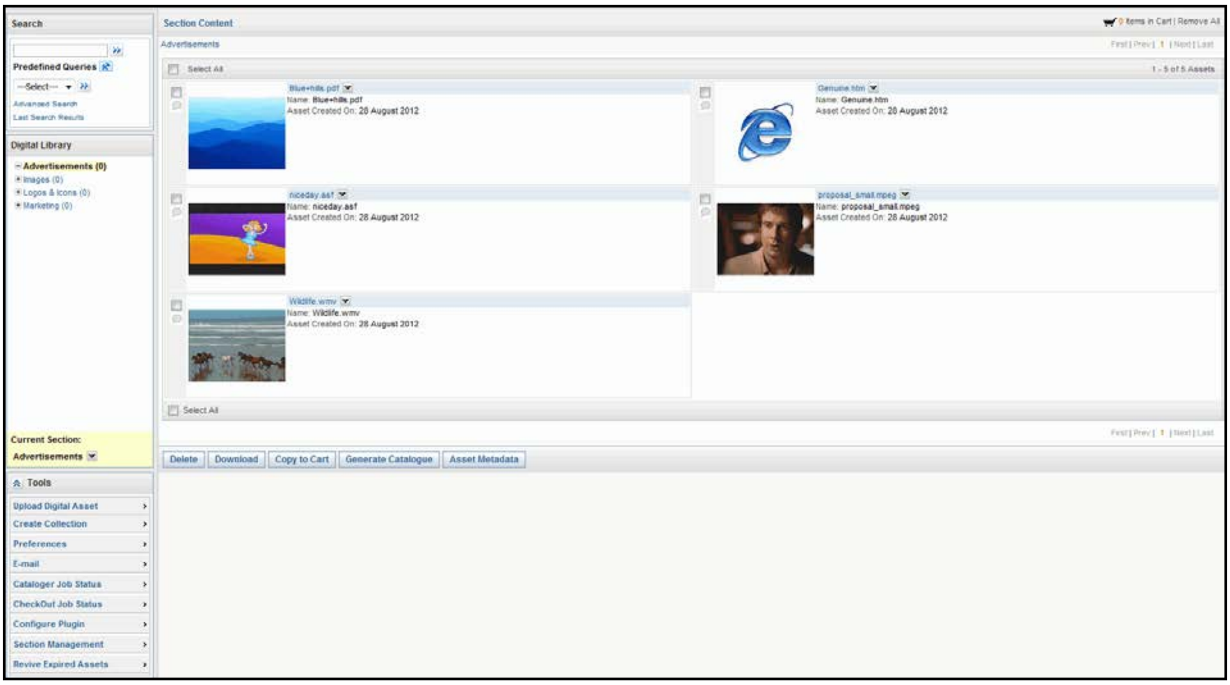


Figure No.1

Left Pane -The left pane is divided into sections providing users with functionality related to the digital library manager. The sections are:

- **Search** – Allows the user a facility by which the digital assets can be searched based on either a keyword or by providing more elaborate search criteria through the advance search facility.
- **Digital Vaults and section navigator** – Allows the user to navigate into vaults and sections by providing a tree like structure and searching for digital assets. It also shows the current selection.
- **Tools** – Displays links to various digital library tools.

Content Frame - It displays thumbnails of assets and collections from the current selected vaults/sections, assets in cart or show assets resulted from a search.

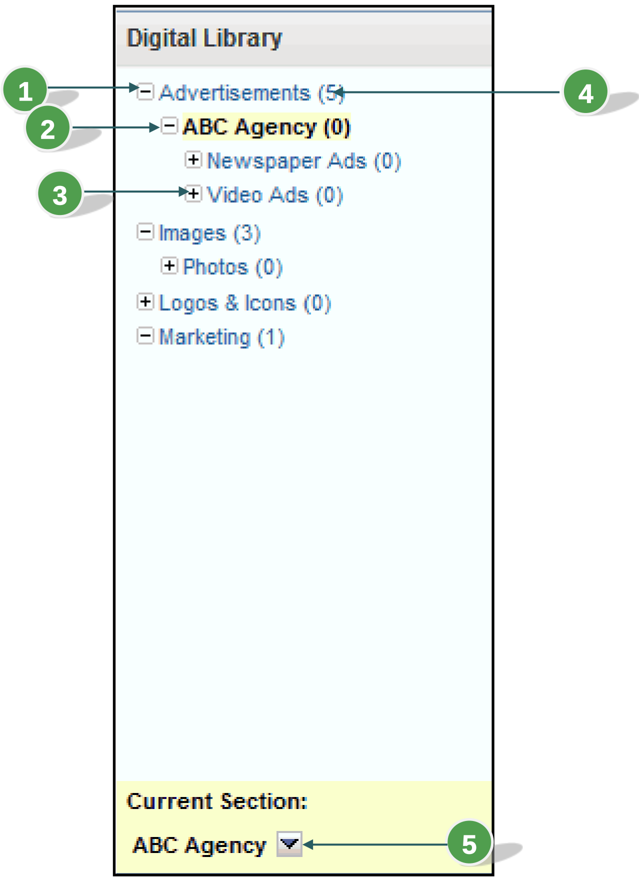
Organizing and Retrieving Digital Assets

The digital library organizes digital assets in vaults and section hierarchy and is secured by security policies applied to vaults and sections. The administrator or the user can either use search or can navigate to a particular section to retrieve the assets.

Navigation and Search

Similarly the section navigator allows the user to navigate into a vault by expanding the vault hierarchy and drill down to the required section to view the assets stored under it. The user can click on '+' image to expand or '-' image to collapse the tree structure **(Figure 2)**.

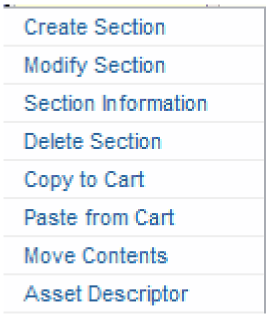
1	**Vault**



2	**Section**
3	**Sub-section**
4	**Asset count in the Section hierarchy irrespective of access.**

Figure No.2

At the bottom of the navigator, click on the button **5** to bring up the menu with links to perform the following operations:

	**Create Section**: Allows user to create section in current selected vault.
	Modify Section: Allows the user to modify the current selected section. (The vault name and description cannot be modified but the security policy can be changed depending on the rights).
	Section Information: Additional information can be associated with a section by associating facets. On the section information screen the information in the facet field can be edited/ deleted from this screen. Facets can be associated with the sections from the create section and the modify section screens.
	Delete Section: Allows the user to delete a section from the current selected vault. This link is not available for a vault as a vault cannot be deleted.
	Copy to cart: Copy the section to the cart. This link is not available for a vault as a vault cannot be copied. Assets can be linked from the cart See section 6.7. **Note**: The naming convention for the files which are copied is <Copy>_<Date Time> e.g. COPY_20091216175324.
	Paste From Cart: Select from the cart content and paste into the current section. **Note**: The naming convention for the files which are pasted is <Copy>_<Date Time> e.g. COPY_20091216175324.
	Move Contents: Move content of the cart into the current section. **Note**: The naming convention for the files which are moved is <Move>_<Date Time> e.g. MOVE_20091216175324.
	Asset Descriptor: Allows the user to specify additional information to be displayed next to the assets in a list mode.

Managing Assets

The following operations can be performed on the section content screen **(Figure 3)**:

- **The breadcrumbs -** To view assets stored under a section, click on the section name in the vault/section navigator. The section content screen displays the breadcrumbs on the top of the screen, which shows the current location i.e. section path for the current section. Each section in the breadcrumb has a link using which the user can navigate to the desired section 1.
- **Thumbnails -** The thumbnails of all assets are displayed, when a mouse over is done the preview of 300 x 300 pixels is displayed 5 for all the image and video files. For all the other files a popup with a link to

download preview is shown. Click on the button 2 next to the asset to bring up the asset tools. Asset tools has links to view/edit the asset information, download original, download preview, copy to cart and delete. Asset tools also provides the functionality for dynamic rendering.

- **Cart -** The contents of the cart can be viewed by clicking on the icon 3. Click on the **'Remove All'** button 4 to clear the contents of the cart.

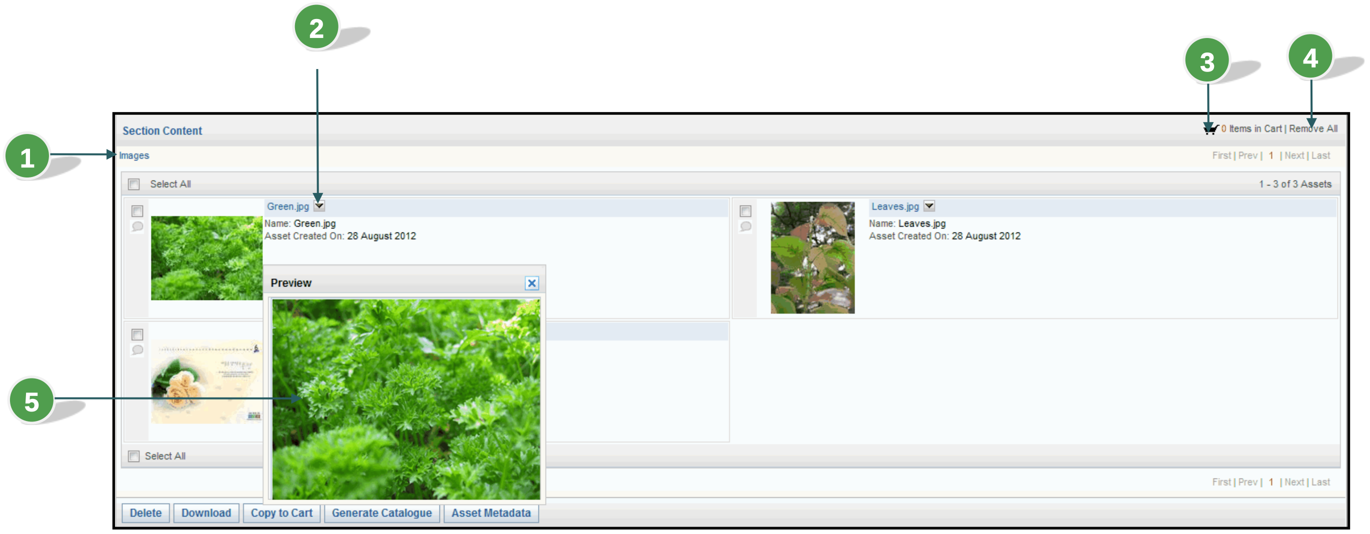


Figure No.3

In case of video files, on mouse over a preview is displayed and the user can play the preview **(Figure 4)**.

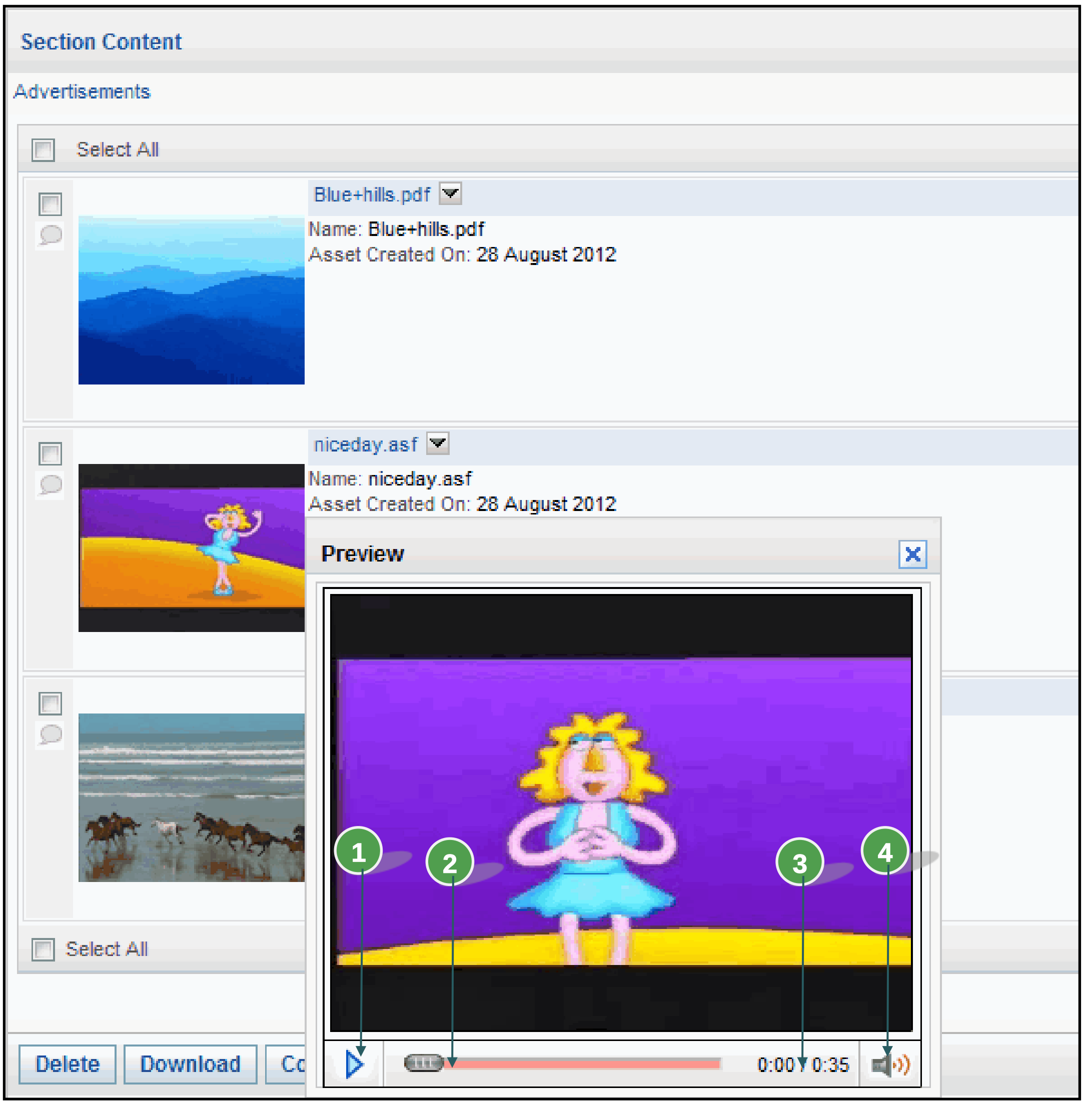


Figure No.4

The following operations can be performed on the preview screen:

1. The preview can be played or paused.
2. The user could forward or rewind the video.
3. The time for the video.
4. The volume can be controlled.

The section content screen has two layouts – Grid and List view. Based on the user preference thumbnail of each assets are displayed as a Grid or List. The user can click on the thumbnail to download low-resolution preview of the asset. The user can also select one or many assets by clicking on the checkbox next to the assets to perform following operations:

- **Delete** - Deletes the selected assets and transfers them to the recycle bin.
- **Download -** Allows batch downloads of the selected assets. The reason for download needs to be mentioned and if the terms and conditions is enforced then it needs to be accepted. The user can select multiple assets and download assets in the following manner **(Figure 5)**:

Note: If the terms and conditions or the reason for download is different for different assets then batch download is not allowed.

- **FTP** – Transfer the assets via FTP to configured FTP servers. User can either select Original, Preview, Thumbnail or all renditions for an asset to be transferred via FTP. Once 'FTP' option is selected and user clicks on '**Ok**' button, a new screen is displayed where the user can select from a pre-configured list of FTP sites where the assets can be transferred. Email addresses of individuals who need to be notified on success/failure of transfer of assets can be specified.
- **Zip files** – Compress them into a single file and download the zipped file. User can either select Original, Preview, Thumbnail or all renditions for an asset to be compressed into a zip file. Once '**Zip files**' option is selected and user clicks on '**Ok**' button, a new screen is displayed where the user can specify the zip file name in which the assets are to be compressed. By clicking on the '**Back**' button the user can go back to the previous screen.
- **Send Files to Folder** – This link is visible to the user if the configuration setting '**Support Network Folder**' is set to yes and the folder name has been specified by the administrator. The user of the system can then download multiple files on a personal network folder or send them to another user folder on the same personal network. While entering the user names for downloading the files the user needs to specify if the files need to downloaded for the logged in user also.

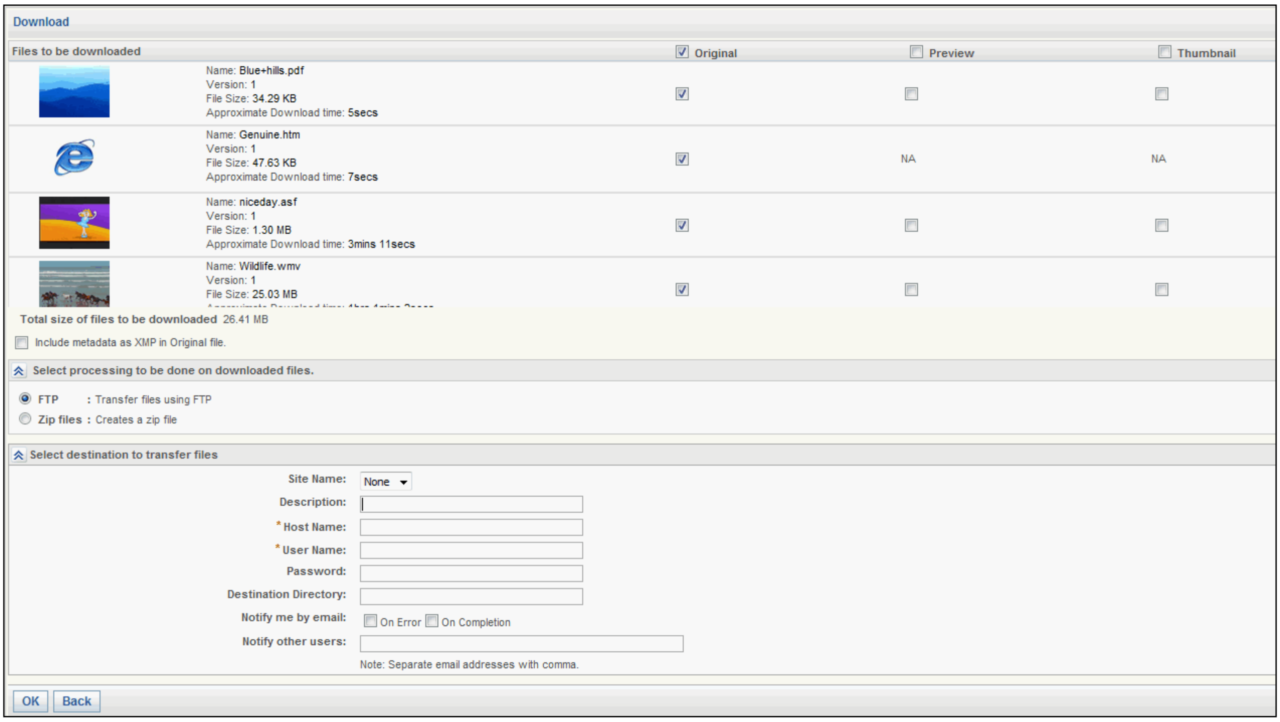
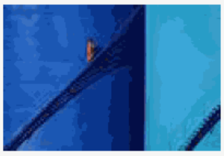


Figure No.5

- **Copy to Cart** - Copy the selected assets into the cart for further processing.
- **Generate Catalog** – A catalog is generated of the digital assets from the section contents screen, search results screen and cart contents screen in PDF format by clicking on the Generate Catalogue button on these screens. The Catalogue can be then printed out **(Figure 6)**.

Digital Asset List

	**Name:** Bike.jpg **Asset created on:** 24 October 2009 **File size:** 9.71 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** Test~`!@^&()_+=}{][',.jpg **Asset created on:** 24 October 2009 **File size:** 19.81 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** 4.jpg **Asset created on:** 24 October 2009 **File size:** 10.01 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** 10005_2008.jpg **Asset created on:** 24 October 2009 **File size:** 89.19 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** 10008_2011.jpg **Asset created on:** 24 October 2009 **File size:** 11.13 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** Market.jpg **Asset created on:** 24 October 2009 **File size:** 11.05 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** God.jpg **Asset created on:** 24 October 2009 **File size:** 45.57 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1
	**Name:** 10006_2009.jpg **Asset created on:** 24 October 2009 **File size:** 61.73 KB	**Description:** - **Section path:** PD_Vault\12\String Deliverable 1

Generated By: System Administrator (Admin), Tuesday, October 27, 2009 10:34 AM Page 1 of 2

Figure No.6

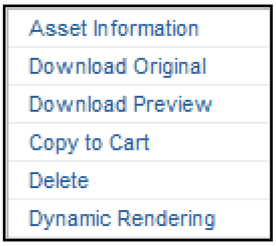
Video Files

In the Digital Library video Files of the type WMV, ASF, MOV, AVI, MPEG and audio files of the type MP3 now have auto-generated previews in FLV format and thumbnails in JPEG format (excluding MP3 files).

The users need only upload Original files of the above-mentioned formats and the FLV preview and thumbnails will be automatically generated in the system.

Advanced Asset Operations

When the user clicks on next to the link/name of an asset an individual Asset menu is displayed. It has links to perform the following operations:



Asset Information - This displays the Asset information screen **(Figure 6)**.
Download Original - Allows downloading and viewing of the original asset. The reason for downloading needs to be given depending on the setting. While batch downloading the assets from DAM, users can choose to include the XMP information with the assets and view those in applications that support XMP such as Photoshop for image files, Acrobat for PDF files or Adobe Bridge for various other file formats. The XMP information will be available in the file properties.
Download Preview – Allow user to download the low-resolution preview of the asset.
Copy to cart - Copy the asset into the cart for further processing. From here the user can link two assets. **See section 6.7.**
Delete - Delete the asset and move it into the recycle bin.
Dynamic Rendering – Allows the user to render/download an asset into different image/document format for example user can download a jpeg as a BMP.

Asset Information

Asset information such as the asset name, description and the expiry date (An additional facility for users with appropriate access to forcefully mark an asset as expired instantly) is displayed which can be edited by clicking on the '**Edit**' link 3 on the top right corner. The thumbnail and the preview can be uploaded from here. Other operations such as lock, freeze, download preview and download original can be performed.

Note: Only the Admin, Asset Owner, Current version creator and the user who has locked or frozen the Asset can unlock or unfreeze the Asset.

The following tabs are displayed on the asset information screen **(Figure 7)**:

- **Summary**: Asset information such as asset owner, current version, downloads and so on is displayed.

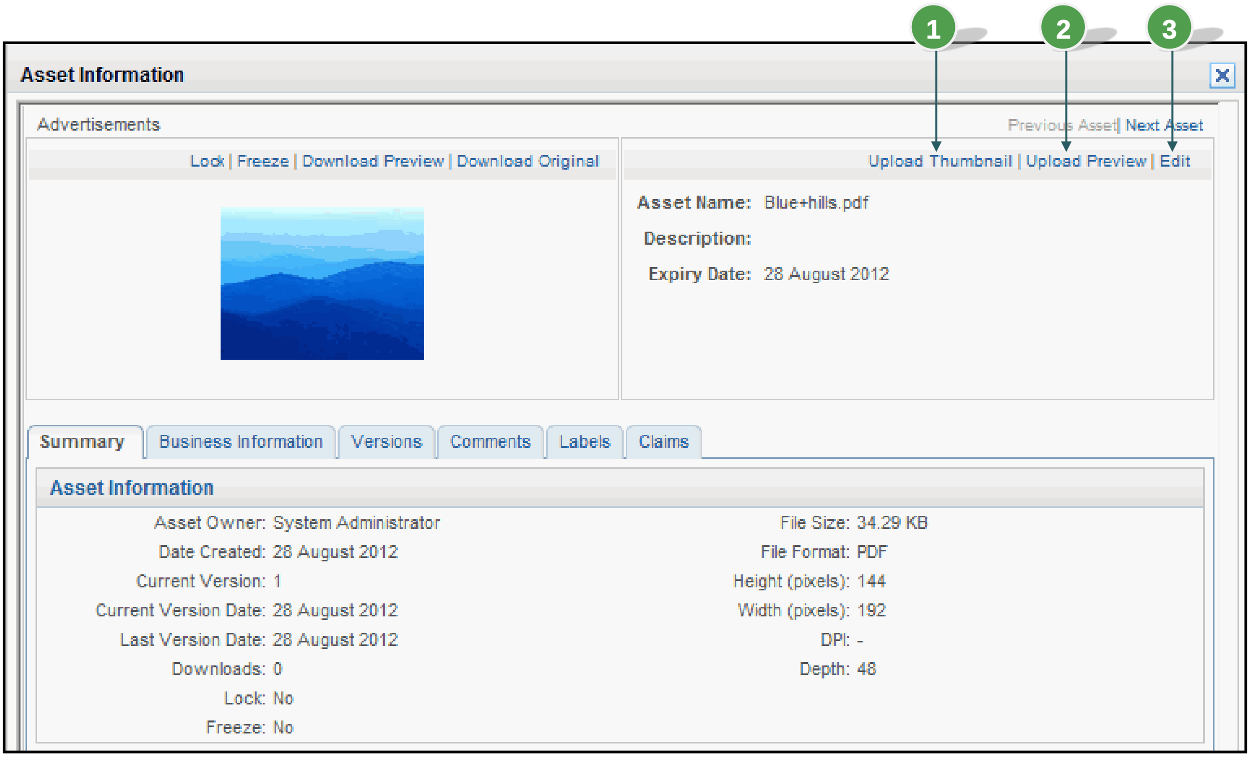


Figure No.7

- **Business Information**: The user can attach additional information by selecting the facets from a drop down box and clicking on the '**Add**' button. The XMP (Extensible Metadata Platform) information is also displayed. The assets can be easily searched and retrieve along with the XMP information.
  The Business Information forms or Facet forms displayed are tracked for Change Management. The create asset, create version of an asset, addition or modification of business information associated with an asset and the rendition uploaded for and asset or sets then the audit history tracks the changed XMP information as a part of Change Management. Click on the '**View Audit History**' link to view the history. This link is available only if the admin sets the Change Management setting to Yes.

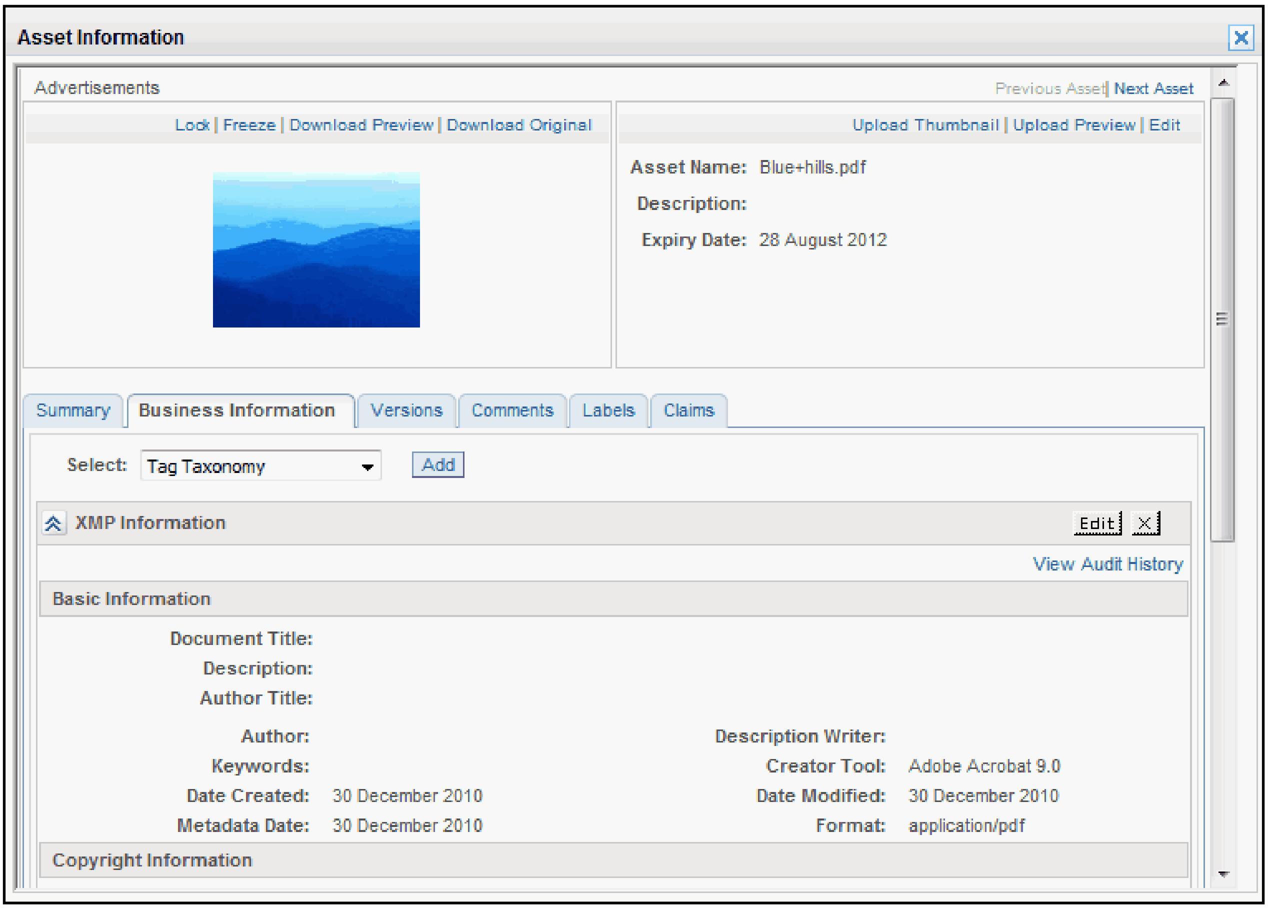


Figure No.8

A audit history popup is displayed which contains a history of changes displayed in blocks. Where each block represents the date on which a change was made. The Change detail is a form that displays data for the selected block. The Change Detail form displays icon for all fields that have changed since the beginning.

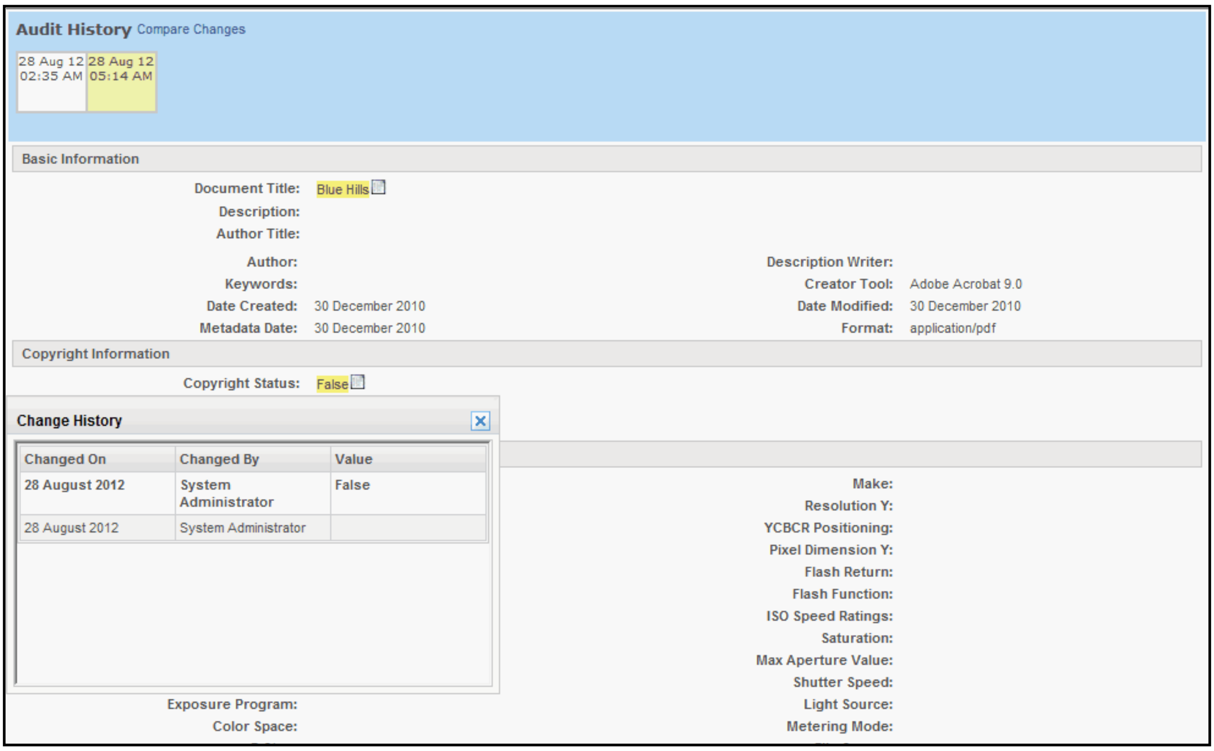


Figure No.9

Click on the icon to view all the changes made for the field. Information such as when the changes were made and who made the changes. Comparison between two changes can be made by selecting the changes and clicking on the '**Compare**' button.

Figure No.10

- **Version**: The user can upload a new version by clicking on '**Upload Version**'. It allows the user to manage versions of the asset and delete the old version by clicking on '**Delete**' button. It also allows updating the current renditions – thumbnail, preview and the original file.
- **Comments**: Comments for the assets can be posted or the posted comments can be viewed. Documents can be attached to the comments.

Dynamic Rendering

A dynamic rendering screen **(Figure 11)** is displayed where the following operations can be done on this screen:

- The user can download the original, preview or the thumbnail in the following formats - BMP, JPEG, PCX, PICT, PSD, SGI, TIFF, PNG or TGA.
- The DPI can be selected.
- The user can crop, resize, flip and rotate the image.

- The image can be viewed in full screen.
- The image can be zoomed in or out by moving the slider.

After all the changes have been made the image can be saved by clicking on the '**Save**' button.

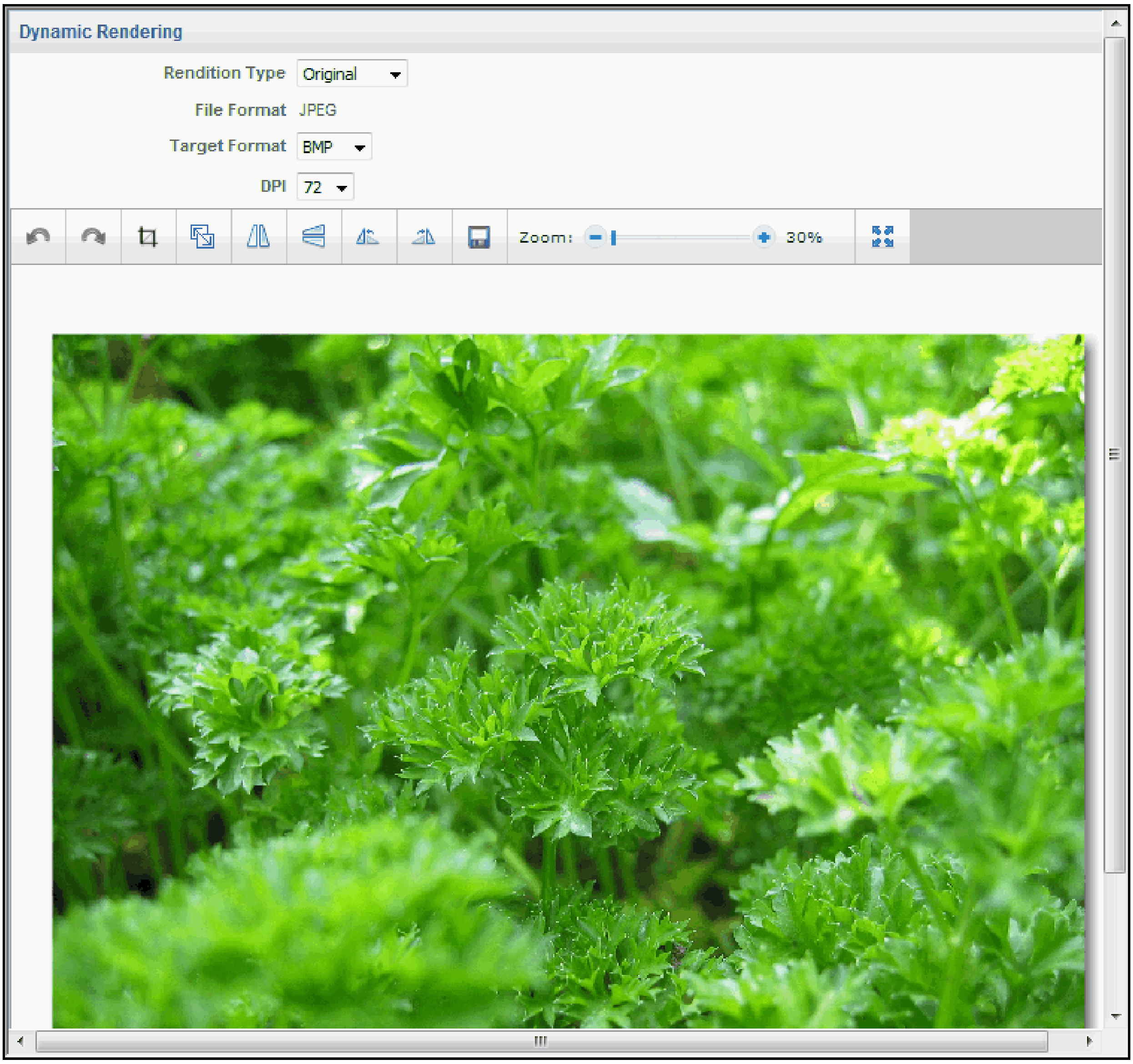


Figure No.11

Expired Assets

Once the asset reaches its expiry date, the system marks the asset as expired. The asset is displayed with a watermark of expiry on it and the assets cannot be utilized and no operations can be performed on the asset. There is no preview on a mouse over and the asset information is displayed in as a read-only screen. If a catalog is generated the expired assets are shown with an expired watermark on them. In the asset information screen the reason for the expiry of the asset is visible if the audits in the setting are set true.

Note: Only the Administrative group users, Asset Owner, Current version creator and the user who has marked that Asset as Expired can revive the Asset.

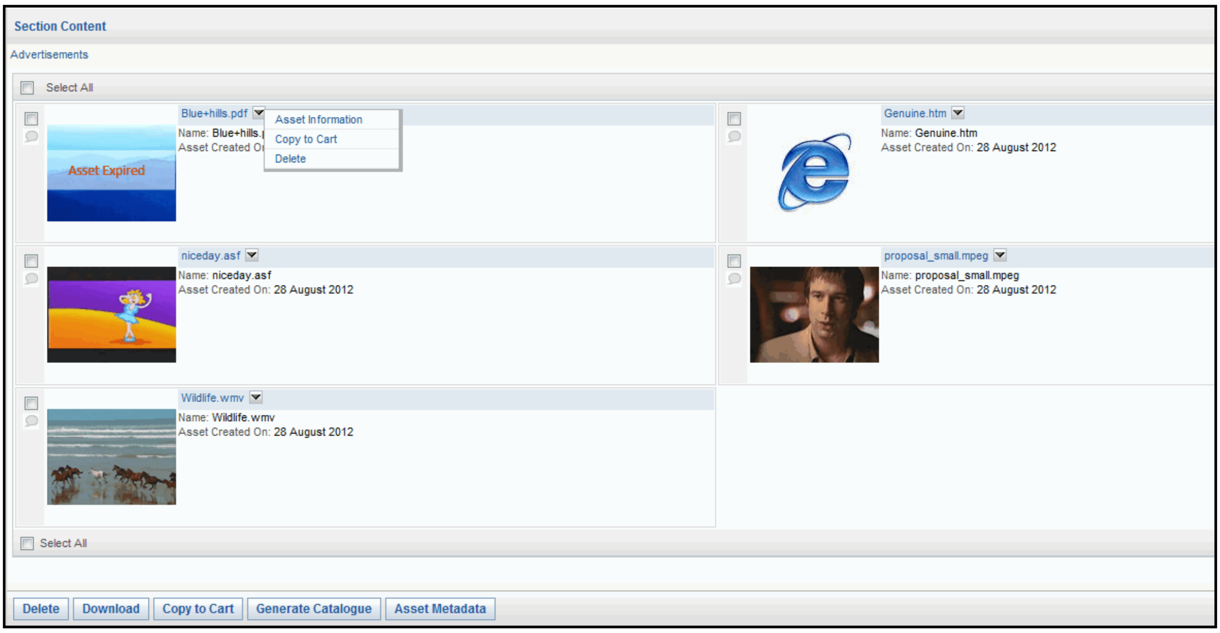


Figure No.12

Linking Assets

Linking of assets can be done in the digital library solution. These assets can be present at different locations in the digital library but they are logically related and can be linked. All links associated with an asset can be viewed from the linked asset information screen for that asset.

The following steps are taken to link assets:

- Copy the digital assets to be linked with each other to the cart using copy to cart function.
- Once the assets are copied to the cart, select the cart by clicking on the  icon on the top right corner. The cart contents are displayed (Figure 12).
- Two items can be linked with each other in the cart by selecting both of them and clicking on the '**Link Assets'** button provided on the cart content screen. After the assets are linked the user will get a confirmation that the assets are linked.

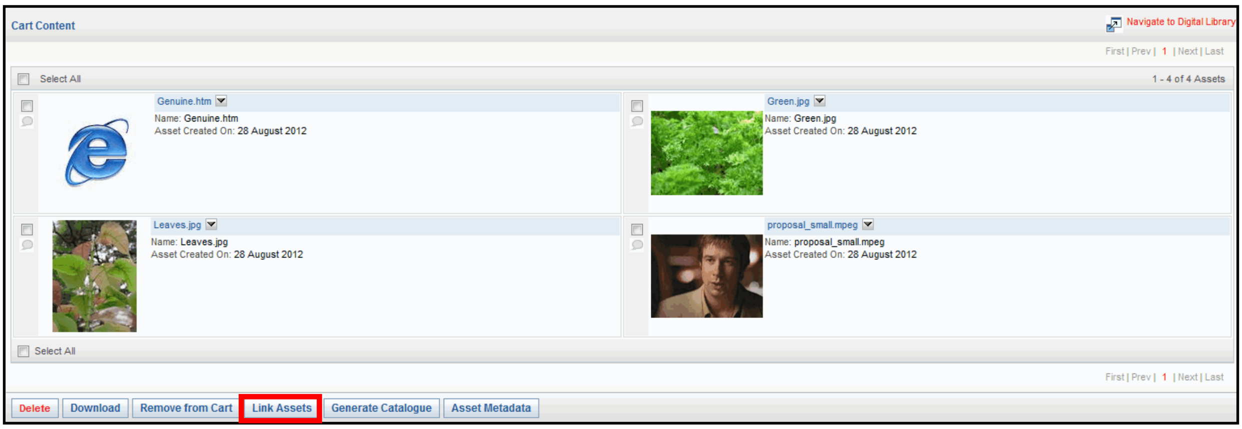


Figure No.13

- If a single asset has to be linked with several assets select the '**Mark for Linking**' option on the dropdown asset menu of the asset to be linked with others assets (I.e. the source).

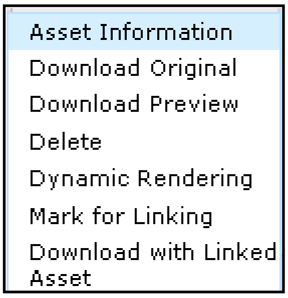


Figure No.14

- The cart contents will be displayed with the '**Digital Asset Marked for Linking'** asset on the top and the assets to be linked in the cart below it. Select the assets to be linked with the 'Source' asset and click on the '**Link with Marked Asset**' button **(Figure 15).** This will link all the selected assets with the source asset.

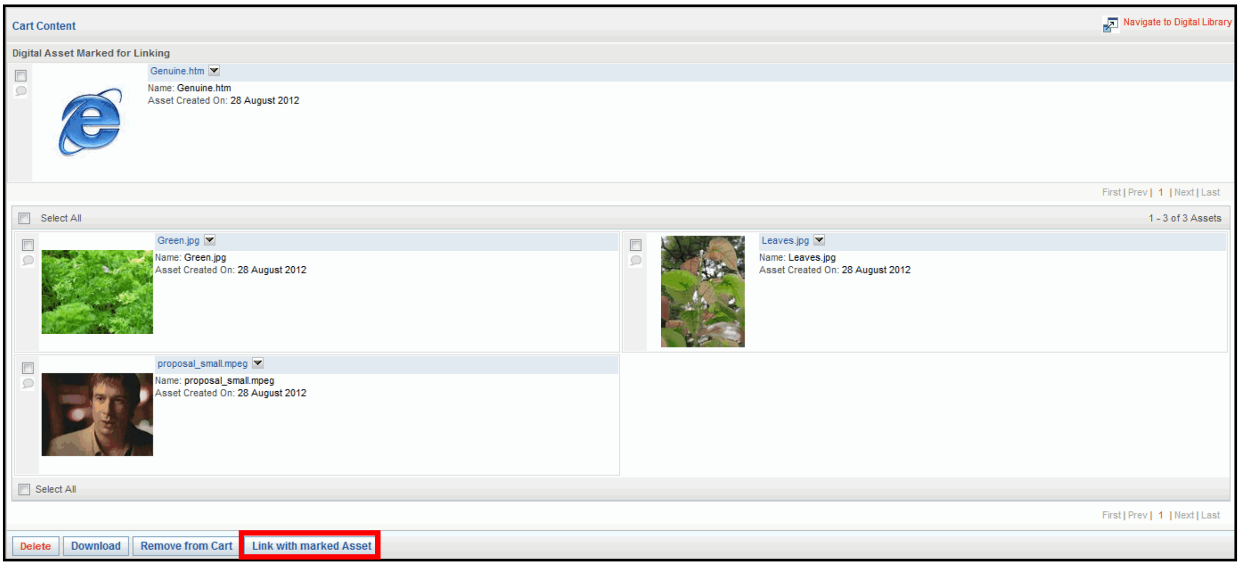


Figure No.15

To remove the linking mode for the source:

- The user can leave the linking mode simply by clicking on the '**Unmark Asset for Linking**' link in the asset menu of the source asset.
- If the user wants to mark other assets as source, click on the '**Mark Asset for Linking**' link in the asset menu of the asset. This will change the source asset for linking and take the user back to the cart content screen

If the asset has linked assets associated then a '**Download with Link Assets**' option is made available in the asset menu. By selecting this menu, the user can download all the assets linked with the source.

'' icon is shown only if the asset has other assets linked to it. By clicking on the '' icon next to the asset the user can view the assets which are linked to the selected asset **(Figure 16)**.

The following operations can be done on the linked asset information screen **(Figure 16)**:

- **Download All**: All the assets can be downloaded.

- **Download**: The selected assets can be downloaded.
- **Remove Link:** The linking between the source and other assets can be removed.
- **Copy to Cart**: The selected asset can be copied to the cart.

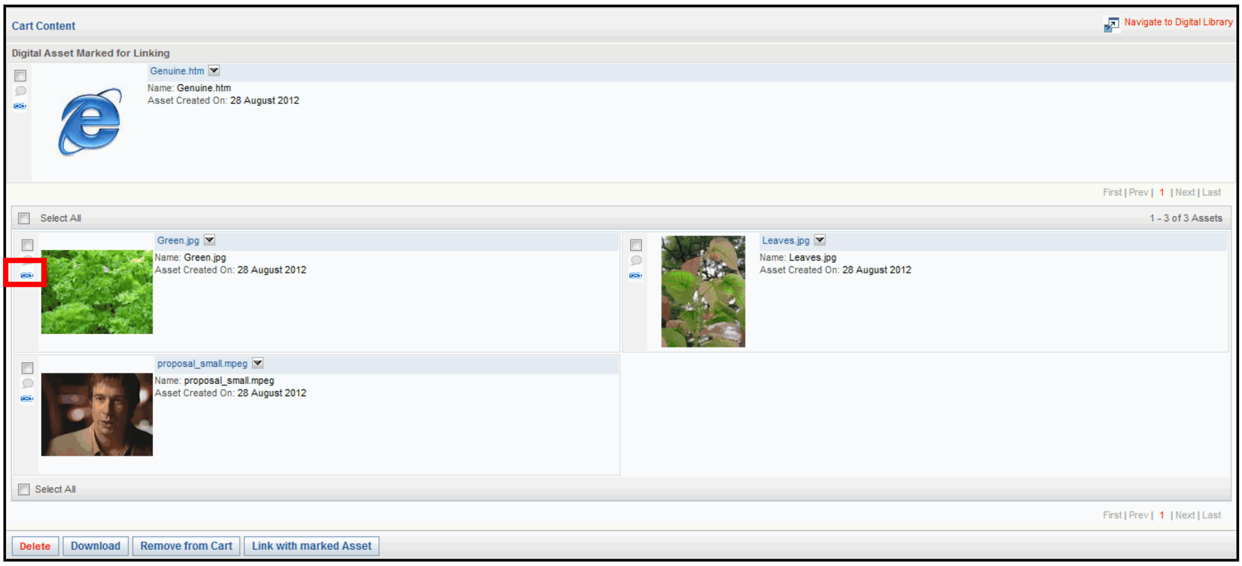


Figure No.16

Searching for Digital assets

The search option provided by the application uses a powerful query engine enabling access of digital data within the digital library.

There is the quick and easy simple search, predefined search, and advanced search.

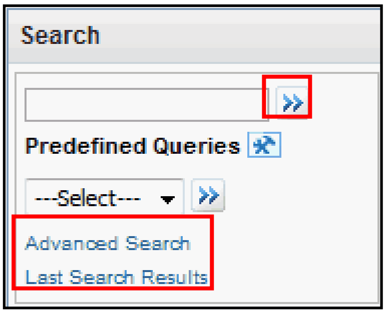


Figure No.17

Simple Search

In simple search, the user needs to specify only the keyword and not the search condition. The Simple Search functionality includes a document search. Document Search means that the keywords or key-phrases entered in the edit box are searched within the contents of files stored in DAM. All files that contain the keywords/phrases are displayed in the search results. Document Search can search for a keyword or phrase in files of the following formats:

- .DOC
- .XLS/.XLSX
- .PPT
- Text files : .TXT

- Hypertext files : .HTM/ .HTML

Note: Some limitations of .PDF documents – While generating a PDF, it may be generated as an image or a text file. If the PDF file is generated as an image file, the Document Search will not retrieve the file even if it contains the keywords or phrases.

For a simple search, specify search criteria in the search box and click on the button **(Figure 17)**. A search results screen is displayed. This screen lists all the items related to the search query.

Notes:

1. If '&' is used as a filter then it needs to be enclosed in double quotes.
2. The count of the searched assets depends on the settings for the maximum search results in the 'Settings' section in the admin guide. If the searched asset count is more than the set value then the assets after that count will not be displayed and the search within the search will also be within those assets only
3. The search results are displayed based on the sorting preferences setup by the user from the Tools/Preferences in Digital Library. If the user has not setup any sorting preferences then the system wide sorting preferences from Administration/Settings in Digital Library are used to display the sorting results

The user can search within the search result returned by the simple search by providing another search criteria and clicking on the '**Search**' button **(Figure 18)**.

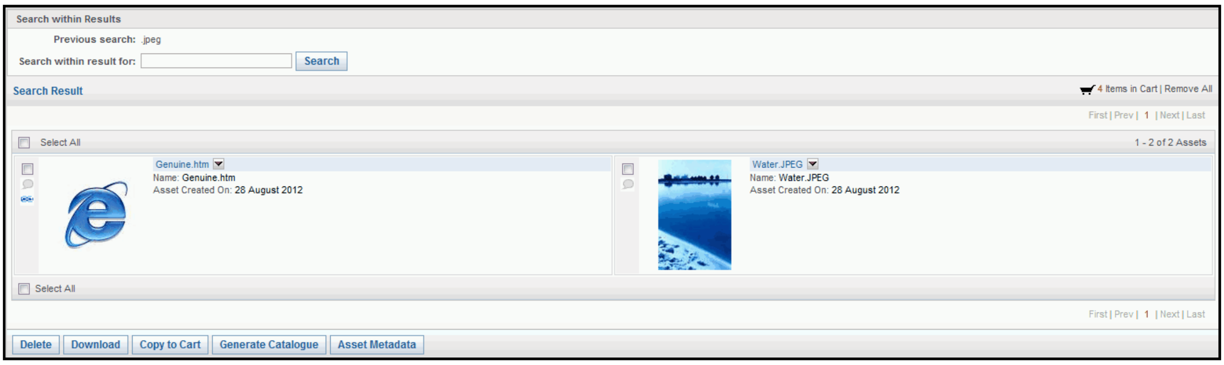


Figure No.18

Examples of how Simple Search works:

Search String	Results	Comments
SAS logo	It will return all assets that have the word SAS as well as logo in either the name or description or one of the searchable business info fields. The order in which the words appear does not matter. i.e. If there is an asset called logo for SAS it will still appear.	It works like AND.
SAS <space> + <space> logo	It will return all assets that have the word SAS or the logo in either the name or description or one of the searchable business info fields.	
SAS and logo	It will return all assets that have the word	

	SAS as well as logo in either the name or description or one of the searchable business info fields.	
SAS or logo	It will return all assets that have the word SAS or the logo in either the name or description or one of the searchable business info fields.	
"SAS logo"	It will return all assets that have the word 'SAS logo' (as a string) in either the name or description or one of the searchable business info fields.	It works like AND. This is different from the first case SAS logo.
"SAS + logo"	It will return only those assets that have the words BMS + logo in the Name or Description or any of the searchable business info fields	It searches for the plus sign also in the name/description and so the result is different from that which you will get if you do a SAS + logo without the quotes.

Advanced Search

Sometimes a single search criterion may result in the retrieval of many items that match the specified criteria. In case the user needs to narrow down the search further, a detailed search criteria needs to be specified. For this, use the advanced search option.

For e.g. In simple search if the user specifies the keyword which is a brand such as 'Nesnet'. All the items with the brand 'Nesnet' will be retrieved.

In advanced search, to narrow it down, the user may specify the search criteria where the brand is 'Nesnet' and the asset type is 'Beauty Shots'. This will retrieve only those specific items, which match these combined criteria.

Click on the '**Advanced Search**' link **(Figure 17)** provided on left pane in the search section. The advanced search option is displayed where the user can specify the filters to search for the assets.

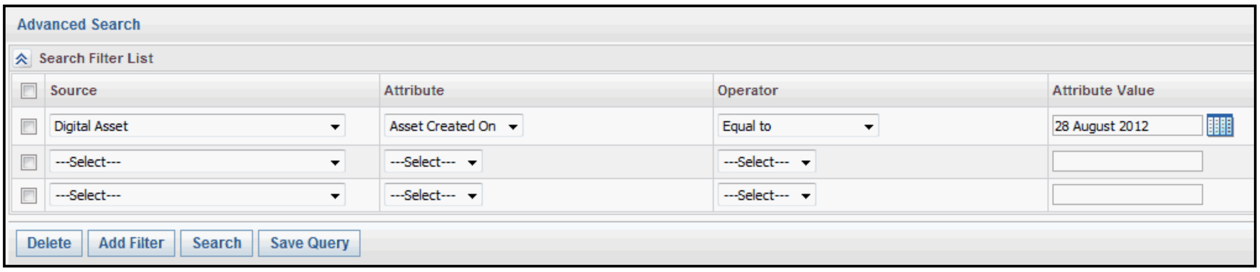


Figure No.19

The following actions can be performed on this screen **(Figure 19)**:

- **Delete** – Deletes the selected filter criteria.
- **Add Filter** – By default there are three blank rows to specify the filters. New filter criteria can be added. For each row of filter the user can specify information source, field/attribute of the source, operators and attribute value to search.

- **Search** – Search's for the digital assets, which fulfill the filter criteria's entered by the user. A search result is displayed. The user can view the results by clicking on the '**Search**' button **(Figure 20)**.

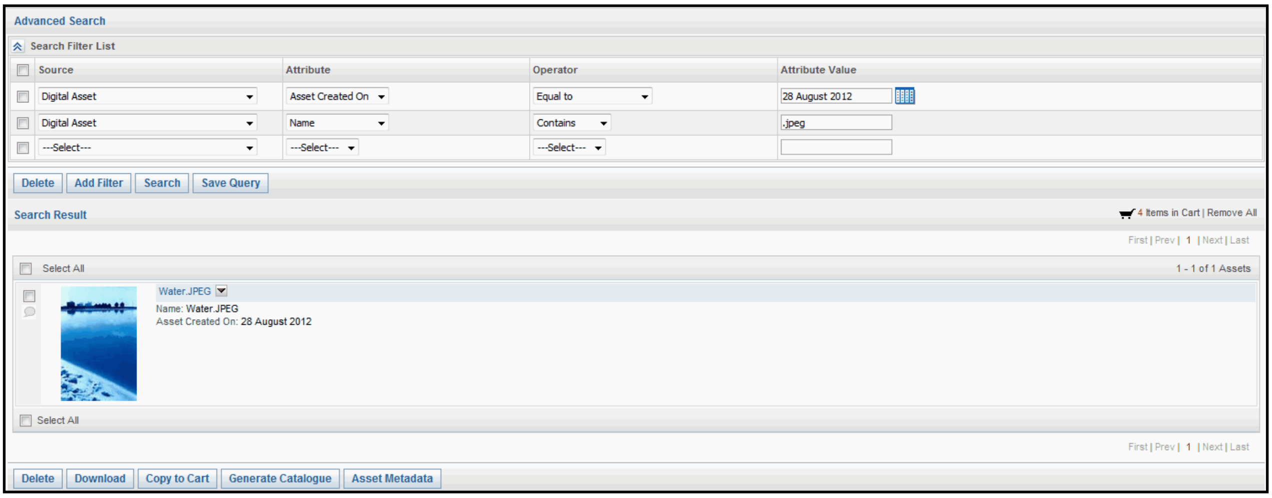


Figure No.20

On the search result screen the user can delete, download the digital asset, copy the digital assets to cart, generate a catalog and generate a asset metadata report by clicking on the '**Delete**', '**Download**', '**Copy to cart**', '**Generate Catalogue**' and '**Asset Metadata**' buttons respectively. Clicking on the next to each digital asset brings up the asset menu. The asset tool also provides functionality for Dynamic rendering. The user can navigate to section by clicking on 'Navigate to section' link from asset tools.

- **Save Query –** The user can save the specified filter criteria list for further use. Save the search query by entering the query name and description **(Figure 21)**. Click on '**Save**' button to save the query or cancel the operation by clicking on the '**Close**' button.

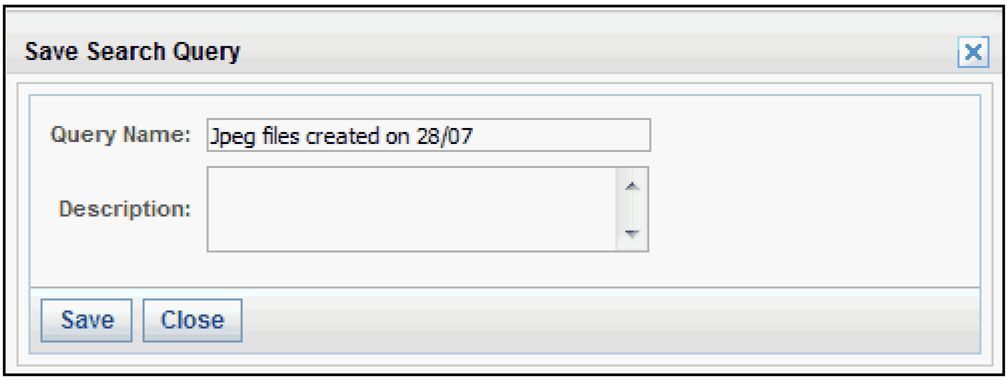


Figure No.21

Advanced Search "operators"

Data Type	Operator
String	Equal To
	Not equal to
	Contains
Integer	Equal To
	Not equal to
	Greater than

	Greater than equal to
	Less than
	Less than equal to
Float	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
Decimal	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
DateTime	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
	Between
Boolean	Equal to
Currency	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
	Between
Multi Select	Contains
Text	Equal to
	Contains

Advanced search filters.

- Source: Digital Asset

Attribute	DataType	Operator	Value
Name	String	Equal To Not equal to Contains	You can search for DigitalAsset name with all supported operators.
Description	String	Equal To Not equal to Contains	You can search for Digital Asset description with all supported operators.
Lock (If locked the asset cannot be downloaded)	Integer	Equal To	The locked digital assets can be searched for. The value is '1' if locked and '0' if not locked.

Freeze (If frozen a new version cannot be added to the asset)	Integer	Equal To	The frozen digital assets can be searched for. The value is ‘1’ if frozen and ‘0’ if not frozen.
DateCreated	DateTime	Equal to Greater than Greater than equal to Less than Less than equal to Between Date Macros	Digital assets can be searched for by the date created. The date can be selected from the calendar.
DateCataloged	DateTime	Equal to Greater than Greater than equal to Less than Less than equal to Between Date Macros	Digital assets can be searched for by the date created. The date can be selected from the calendar.

- Source: Locked By

Attribute	DataType	Operator	Value
Name	String	Equal To Not equal to Contains	Digital assets locked be a particular user can be searched for.

- Source: Digital Asset Owner

Attribute	DataType	Operator	Value
Name	String	Equal To Not equal to Contains	Digital assets owned by a particular user can be searched for.

- Source: Digital assets in Section

Attribute	DataType	Operator	Value
Name	String	Equal To Not equal to Contains	Digital assets in a particular section can be searched for.
Path	String	Equal To Not equal to Contains	Digital assets in a particular path can be searched for.

Predefined Search Queries

Predefined Search Queries are saved from an advanced search. To manage the saved query, click on the button **(Figure 17)**. To run a saved query, select a query from the drop down list box and click the button.

Last Search Results

By clicking on the '**Last Search Results**' **(Figure 17)** the users last search query and the results are displayed.

Tools and configuration

There are different ways of uploading assets:

- Interactive check in – That is one asset at a time explained below.
- Batch Cataloging – If the assets are more than 1GB then it is recommended to do batch cataloging. Multiple assets can be cataloged onto an ftp site.
- Cataloging from the network folder - Allows the users to upload digital assets from their network personal drive folder.
- Batch Cataloging using the MOM Desktop.

The left pane of the digital library provides a tools menu, which has several links such as **(Figure 1)**:

- **Upload Digital Assets** – The following information needs to be provided **(Figure 22)**:
    - **Section Path** – The section where the assets are to be uploaded needs to be specified. The path can be selected by clicking on icon.
        - **Disk Space** - The disk space available is displayed .
    - **Original** - The original file needs to be uploaded. This is mandatory as the system can generate a preview and a thumbnail (See section 9.10.1 for more information).
    - **Preview** – The preview file can be uploaded but can be auto generated if not provided.
    - **Thumbnail** - The thumbnail file can be uploaded but can be auto generated if not provided.
    - **Expiry Date** - The expiry date for the asset can be provided.
    - **Description** – The description for the asset can be provided.
    - **Business Information -** Allows the user to provide additional business information or Meta information for the asset. This additional information describes the asset and helps in retrieval of assets once checked in the digital library. Multiple business or Meta information can also be added for an asset. The XMP information gets added for 'Smart 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. XMP can be applied recursively meaning that each time the asset is uploaded; it can carry different information with it. While uploading the asset, the XMP data gets stored in facet fields in DAM. Users can search for assets using the XMP data.

Click on the '**Save**' button to check-in the asset.

Note: When a user tries to catalog an asset in Digital Library, the system warns the user if the services that ensure that the asset are cataloged in the background are not switched on.

While uploading assets remember the following points:

- Long file names are supported but if the file name with path exceeds 256 characters there is an issue with Windows OS itself so SAS Marketing Operations Management cannot support that.
- Two or more spaces are supported.
- All special characters are supported except the characters that the file systems themselves don't support such as /, \, :, *, ?,", <, >, |.

Note: Batch cataloging is recommended for files greater than 1GB in size.

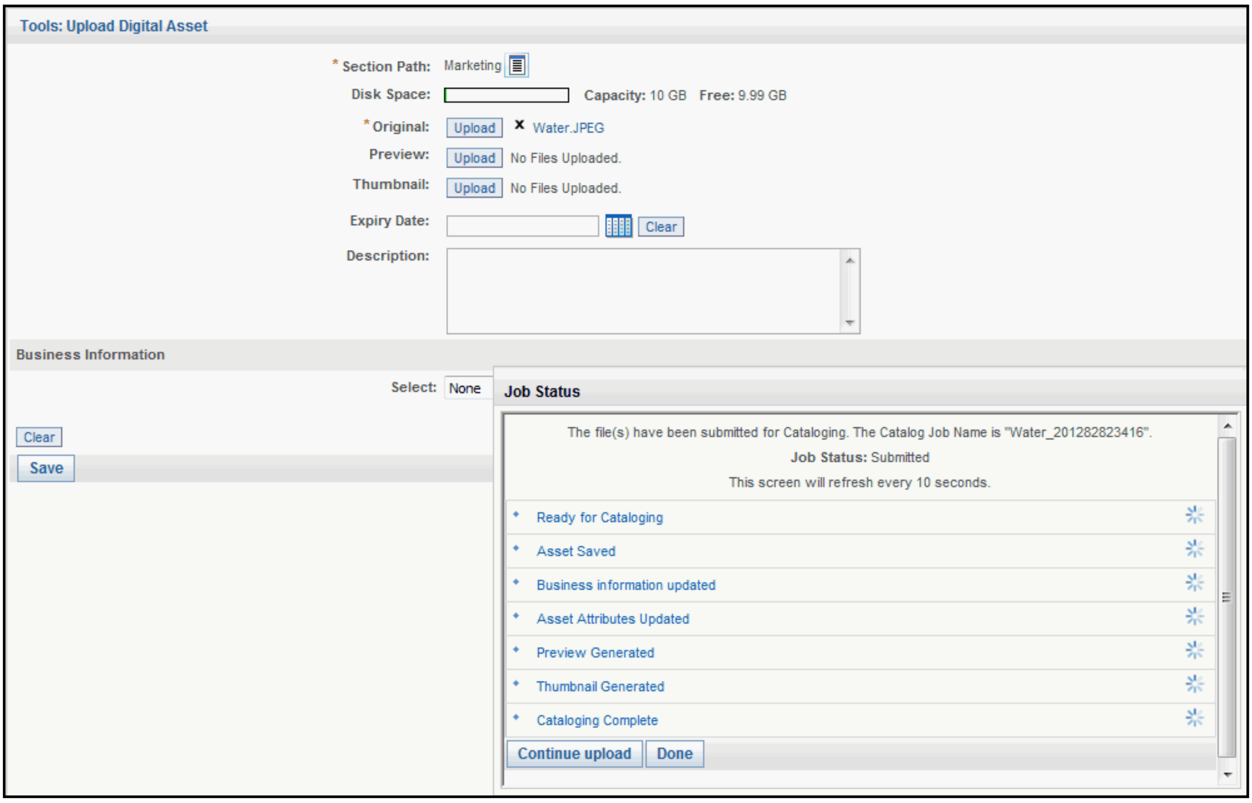
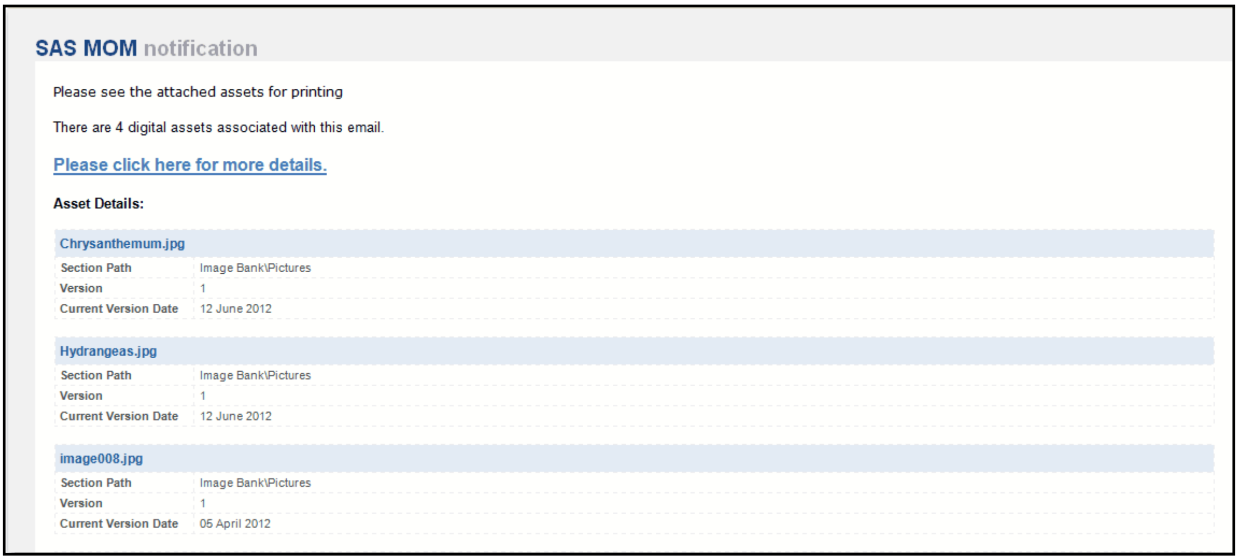


Figure No.22

- **Create Collection -**This allows user to add a new collection in the current selected section. It displays a screen where the user can provide the collection name, description and can upload a thumbnail. Clicking on the '**Save**' button saves the new collection or the process can be aborted by clicking on the '**Cancel**' button.
- **Preferences -** This allows the user to set up solution behavior. It allows changing the format of the layout of the content of the digital library to either grid or list view. By default, the digital library solution displays the list view. It also allows the user to specify the sorting criteria for the assets to be displayed. The user can specify the asset attribute for sorting and the sort order i.e. ascending or descending. The maximum results for search can be specified. The cataloging preferences can also be set here.
- **E-mail -**This allows the user to send e-mails by providing the e-mail addresses. The user can attach assets from the cart to the e-mail and post it to the sender. Depending on the configuration the email can be be sent to users who are not registered users of the system. If the admin has set 'Inherit Sender's Right in Email' to Yes then the access right of the user sending the email will be applicable to the receiver of the email, if No then the user will not be able to open the attached assets depending on the receivers rights. You can choose to copy yourself on the E-mail sent based on a selection of the choice on the E-

mail screen. This is a configurable feature and based on the system configuration can be turned on or off. In DAM emails, you can choose to display additional asset information along with the asset links. This supplemental information can provide additional context for email recipients. For example, the Asset Name, Vault and Section Path for example can now be added as additional information along with the list of Assets in the E-mail **(Figure 23).**



SAS MOM notification

Please see the attached assets for printing

There are 4 digital assets associated with this email.

Please click here for more details.

Asset Details:

Chrysanthemum.jpg	
Section Path	Image Bank\Pictures
Version	1
Current Version Date	12 June 2012

Hydrangeas.jpg	
Section Path	Image Bank\Pictures
Version	1
Current Version Date	12 June 2012

image008.jpg	
Section Path	Image Bank\Pictures
Version	1
Current Version Date	05 April 2012

Figure No.23

- **Cataloger Job Status -** You can track the status of the Cataloging by viewing the Cataloger Job Status in DAM. Any errors in the process of cataloging or Preview or Thumbnail generation get listed along with detailed information for reference and required action **(Figure 24)**.The user can check the status of the following jobs:
  - Single file Check in from UI
  - Batch Cataloging using excel file
  - Batch Cataloging using Desktop
  - Batch Cataloging from Network Folder
  - DAM Job Copy operation
    - Batch Move/Move and Paste from Cart operation.

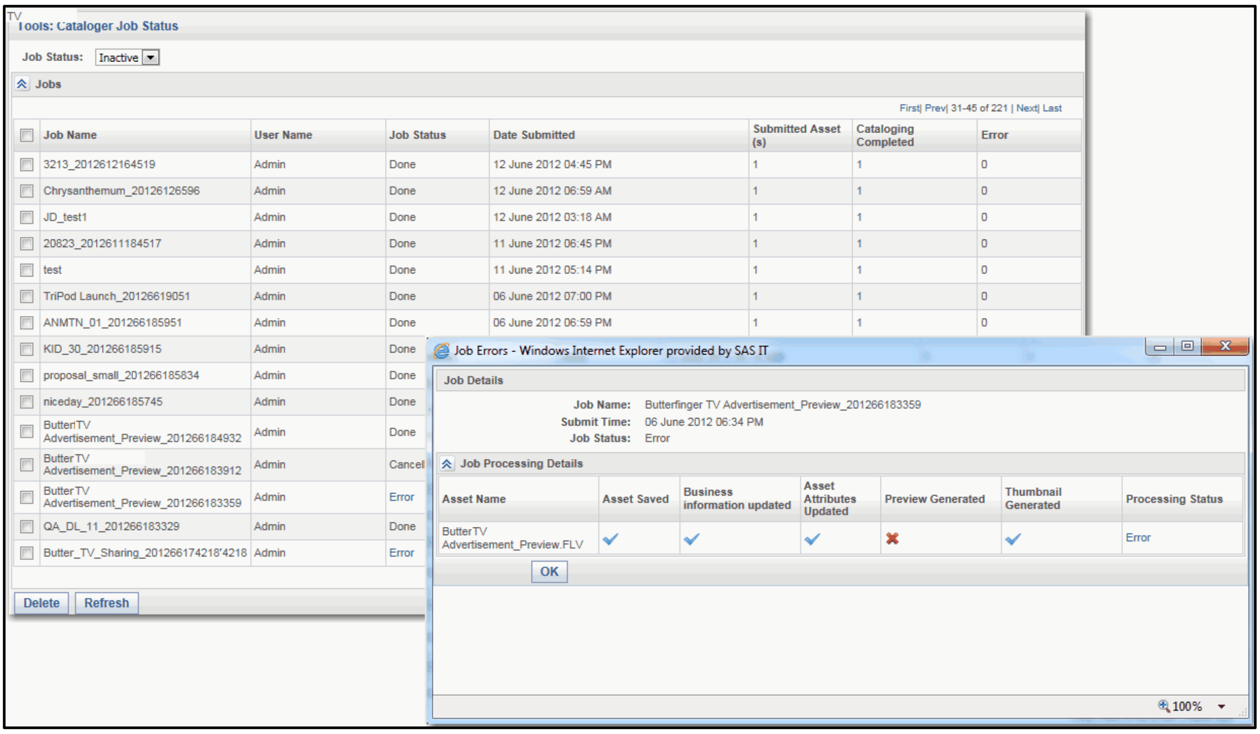


Figure No.24

- **Checkout Job Status –** The user can check the status of the following checkout jobs (downloads):
    - o Batch Download – Zip file
    - o Batch Download – FTP
    - o Send files to Network
- **Configure Plugin** – This link helps to configure FTP sites for downloading assets.
- **Section Management** – A section management screen is displayed. This where a multiple sections can be added, modified or deleted and also set the order of display of the sections in the digital library. By default the sections are sorted alphabetically. Giving specific sections a greater number to place them lower down or higher up in the section display order in the digital library can modify this sort order **(Figure 25)**.

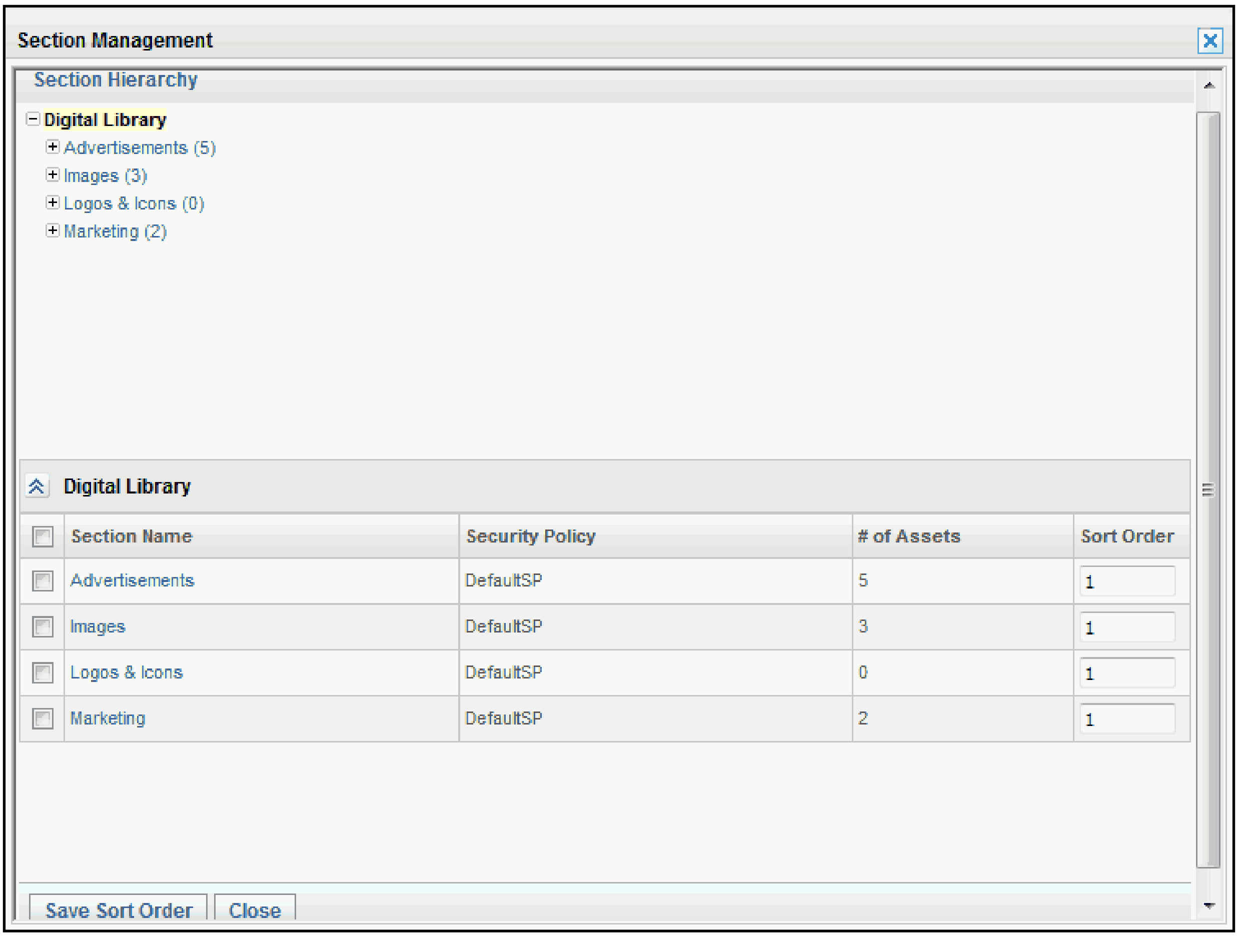


Figure No.25

- **Revive Expired Assets** – The administrative group or the user who has marked the assets as expired could revive the expired assets. The user can generate a catalog of the expired assets.

The following naming convention is followed while upload/download of an Asset is done (in the Catalog job status and Checkout job status screen):

Interaction	Naming Convention
Single file check in	<Upload File Name>_<yyyymmddhhmmss> i.e Date time **For e.g.** If the uploaded file name is "LOGO.pdf" then job name is 'LOGO_20091216175324'
Batch cataloging	In this case the 'Job name' can by the name specified by the user.
Cataloging using MOM Desktop	Job name is entered by user.
Network folder	In this case the 'Job name' can be the name specified by the user.
DAM Job Copy	In this case the 'Job name' can by the name specified by the user.

Copy- Paste	COPY_<Date Time> For e.g. COPY_20091216175324
Move	MOVE_<Date Time> For e.g. MOVE_20091216175324
Batch download - Zip	Compression_<Zip filename specified by user>_<Date Time> For e.g If the zip file name specified by the user is TestZip then the job name is 'Compression_TestZip_18Dec2009 122018'
Batch download - FTP	FTP_<Host name for FTP>_<Date Time> For e.g. If the host name (machine name/IP Address) for FTP is 'sun' then the job name is 'FTP_sun_18Dec2009 121954'.
Batch download – Network folder	SendFiles_<Folder name specified by user>_<Date Time> For e.g. If the folder name specified by the user is TestNetworkFolder then the job name is 'SendFiles_TestNetworkFolder_18Dec2009 122120'.

File Formats Supported by SAS Marketing Operations Management

The following table provides general guidelines on preferred formats for the autogeneration of the previews and thumbnails for various artwork originals file formats.

Original Format	Preview Format	Thumbnails Format	Dynamic Rendition
AI	PDF	JPEG	Yes
ASF	FLV	JPEG	No
AVI	FLV	JPEG	No
BMP	JPEG	JPEG	Yes
DOC	DOC	JPEG	No
DOCX	DOCX	JPEG	No
EPS	PDF	JPEG	Yes
FLV	FLV	JPEG	No
JPEG/JPG	JPEG	JPEG	Yes
MOV	FLV	JPEG	No
MP4	FLV	JPEG	No
MPEG	FLV	JPEG	No
MPG	FLV	JPEG	No
PCD	JPEG	JPEG	Yes
PCX	JPEG	JPEG	Yes
PDF	PDF	JPEG	Yes
PICT	JPEG	JPEG	Yes
PNG	JPEG	JPEG	No
PPT	PPT	JPEG	No
PPTX	PPTX	JPEG	No
PSD	JPEG	JPEG	Yes
SGI	JPEG	JPEG	Yes
TIFF (RGB)	JPEG	JPEG	Yes

WMA	FLV	JPEG	No
WMV	FLV	JPEG	No
WPG	JPEG	JPEG	Yes
XLS	XLS	JPEG	No
XLSX	XLSX	JPEG	No

Note:

1. TIFF (LZW compressed) files are not supported.
2. Only RGB files are supported. CMYK files are not supported.
3. On mouse over a preview will be shown for files of format JPG, JPEG, FLV, BMP, PNG and WPG.
4. For the file formats that do not show a preview on a mouse over, a download link will be shown.

Batch Cataloging using FTP

Overview

Cataloging is the mechanism by which digital assets are imported into the SAS Marketing Operations Management database.

The SAS Marketing Operations Management cataloger provides the user with a mechanism for setting cataloging preferences, submitting jobs and viewing the status of the jobs submitted for cataloging.

While cataloging, the user catalogs the Original file along with the preview and the thumbnail. If the preview and thumbnail are not cataloged along with the Original file, the Cataloger generates thumbnails and previews to enable easy viewing of items using MOM Viewer.

The user specifies the hierarchical structure in which to catalog the Assets in the database.

SAS Marketing Operations Management Cataloger maintains the hierarchical structure while cataloging as specified.

Getting Started

Following is the step-by-step description of how the cataloging is done:

1. The user sets cataloging preferences.
2. Once the user drops the digital assets in the catalog folder i.e. **Mount Point** for the purpose of cataloging, the assets to be cataloged are now considered as a **Catalog Job**.
3. When a catalog job arrives at the mount point the system automatically picks up the job for processing. It performs certain validations like the hierarchy validation, user validation, file count validation etc. After all the validations are done the control goes to the **Cataloger Service**.
4. The Cataloger is responsible for generating the preview and thumbnail:
5. If the user supplies the original file only, the preview and thumbnail are generated by the system using the original file.
6. If the user supplies the original and preview files, then the thumbnail is generated from the preview file. If generation from the preview file fails then the thumbnail is generated using the original file.
7. If the user supplies the original, preview and thumbnail files, then appropriate files are used for preview and thumbnail.

8. In the process of generating the thumbnail and preview if the cataloger encounters any problem then the cataloger logs those errors and transfers the error logs in the error folder so that the user can identify the problem with the file and resubmit for cataloging.

Setting up Cataloger Preferences

The users can set/define preferences based on which the digital assets can be cataloged. Click on '**Preferences**' under the tools menu in the '**Digital Library**' solution. A cataloging preferences screen is displayed **(Figure 24)**.

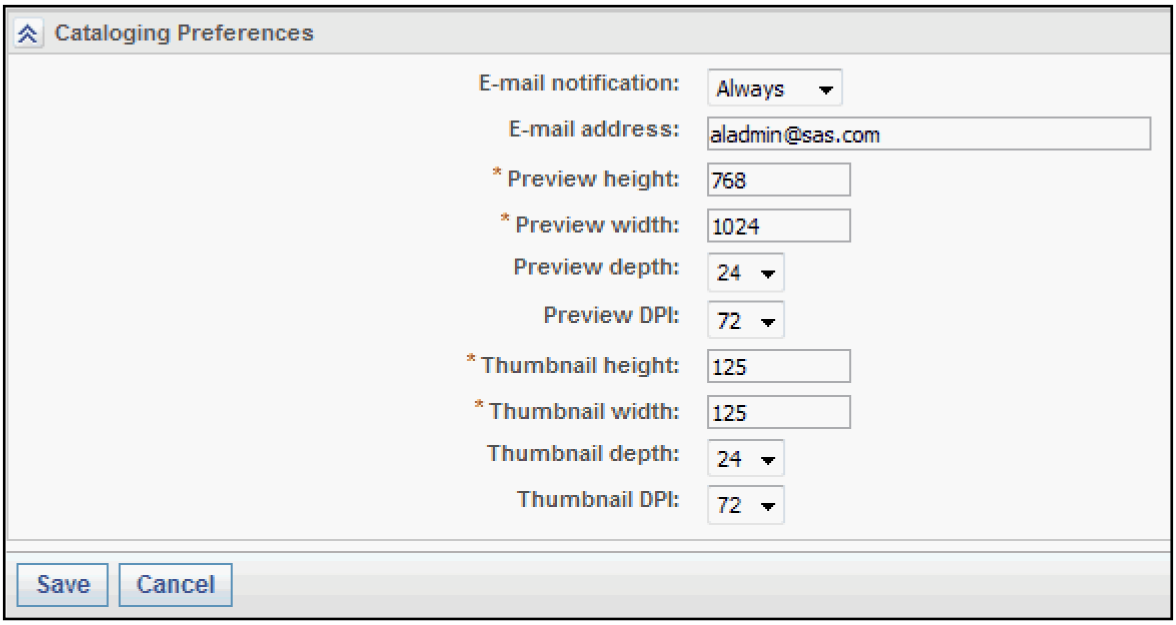


Figure No.26

This screen allows the user to set preferences for cataloging a job in the following manner:

- The user can change the set of preferences for each job or can always use the same set of preferences for cataloging of job.
- The user can get details on the status of the job through the '**E-Mail Notification**' option. Specify the email address for receiving the notification on various events.
- The cataloger provides the user with the option to indicate the preferences for thumbnail and preview generation. The user can specify details such as the height, width, depth and the DPI for preview and thumbnail generation.

Click on the '**Save**' button to save the preferences set by the user.

Preparing and Submitting a Job

Preparing Folders

The user has to first organize the data to be in a particular format. The hierarchy of the digital asset folders is as follows **(Figure 25)**:

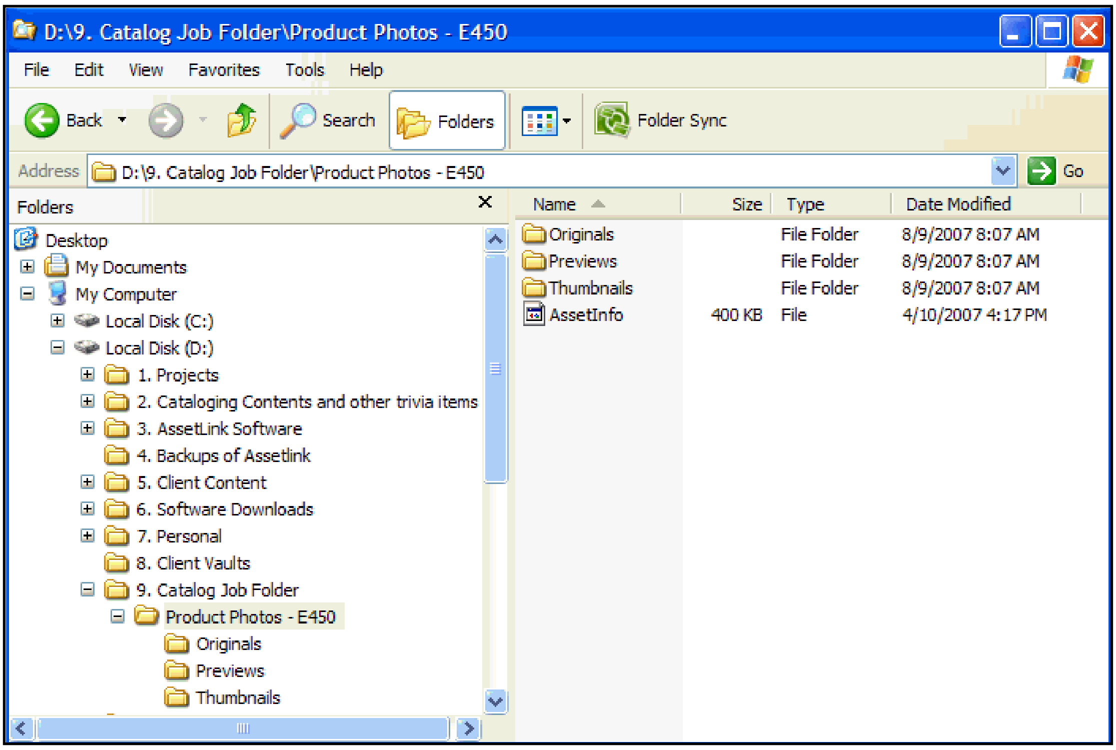


Figure No.27

Mount Point

- **<Login name>**

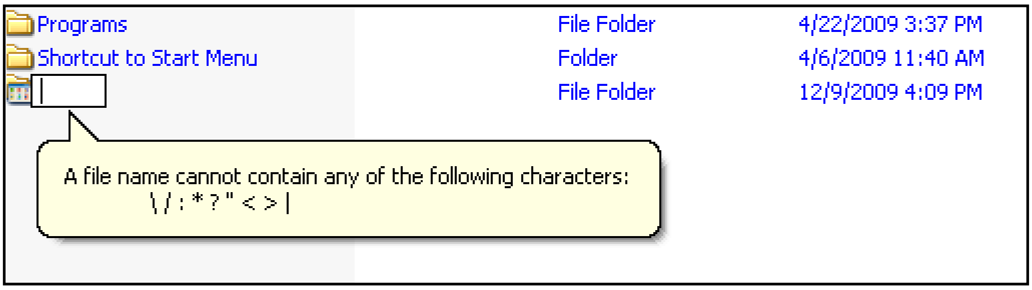
  -**Job Name**

  - Originals (Folder)
  - Previews (Optional Folder)
  - Thumbnails (Optional Folder)
  - AssetInfo (File)

- The user has to create a folder, which specifies the cataloging job name below the mount point under the username folder. The original, preview and thumbnail folder should be created under that folder.
- The original files to be cataloged need to be present in the original folder. The original folder is mandatory but the preview and thumbnail folders are optional.
- If the user wants to have a different preview or thumbnail for a particular file then that needs to go into the previews and thumbnails folders respectively. If the preview and thumbnail is not supplied then they are generated using the original file.
- For the system to relate to the originals and their corresponding previews and thumbnails, the files have to follow a naming convention as illustrated by the example below:
  - Let us assume that the original file is named “File3.eps.sit”.
  - The PDF preview file should be named “File3.eps.sit.pdf”
  - The JPEG thumbnail (if supplied) should be named “File3.eps.sit.jpg”

Additional Rules:

- Long file names are supported but if the file name with path exceeds 256 characters there is an issue with Windows OS itself so SAS Marketing Operations Management cannot support that.
- Two or more spaces are supported.
- All special characters are supported except the characters that the file systems themselves don't support such as /, \, :, *, ?,", <, >, |. See the figure below.



- The files should be given an appropriate extensions.

Note: See section 9.10.1 for more information on auto creation of Preview and Thumbnails.

Creating AssetInfo file

AssetInfo file contains information related to the files to be cataloged into SAS Marketing Operations Management. AssetInfo file is generated by an excel macro. Three excel files are provided for batch cataloging. These files are present in the '<installation Dir>\Binaries' folder on the machine where SAS Marketing Operations Management is installed in case of single machine installation and on the Application server in case of multi-machine installation.

Two are for windows platform and one is for the Macintosh platform. These files reside in the SAS Marketing Operations Management installation folder under the binaries folder. They are as follows:

- **Template_AIMacro_WDLG_WIN.xls** - This template file is for a windows platform. It prompts the user for the location of the AssetInfo file will be saved. Running of Macros will generate the AssetInfo file under the specified location mentioned in the template worksheet.
- **Template_AIMacro_WODLG_WIN.xls -** This template file is for Windows. It does not prompt the location of the AssetInfo instead allows the user to specify the location in the excel sheet. The location for the AssetInfo file can be specified on the first row second column of the template file. Running of Macros will generate the AssetInfo file under the location specified by the user in the template worksheet.

For the MAC machines the templates do not prompt the location of the AssetInfo instead allows the user to specify the location in the excel sheet. The location for the AssetInfo file can be specified on the first row second column of the template file. Running of Macros will generate the AssetInfo file under the location specified by the user in the template worksheet. There are two templates available:

- Template_AIMacro_WODLG_MAC_Office2008_with AssetExpiry.xls - This template includes the 'Expiry Date' column.
- Template_AIMacro_WODLG_MAC_Office2008_withoutAssetExpiry.xls – This template does not include the 'Expiry Date' column.

SAS Marketing Operations Management allows MAC users to batch catalog digital assets into DAM using Excel 2008. The Batch Cataloging process requires certain VB macros to be run on the excel sheet to generate the AssetInfo file before cataloging begins. Since Excel 2008 does not support VB macros, it was required that the macros be converted to Apple script. The MAC users can use Excel 2008 to generate the AssetInfo file that will be utilized for Batch Cataloging to DAM. Windows users will use Excel 2000/2003/2007.

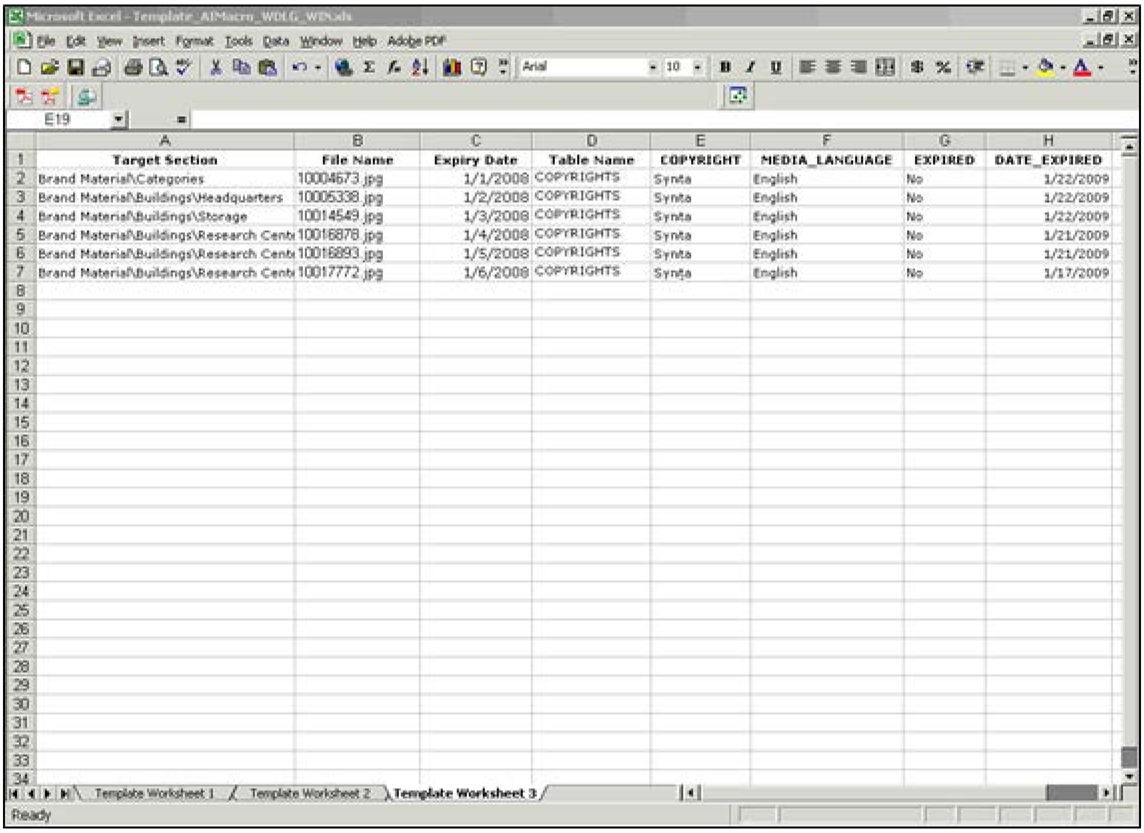
Note: Excel 2007 users will have to save the excel sheet in 97-2003(.ppt) format.

The excel template file is the map that indicates where each of the files should go in the hierarchy and which metadata should accompany it. Each row has all the information needed for each asset.

The excel file has the following column headers:

These first 3 columns need to be filled in for the cataloger to pick up the files and locate them in the proper place:

- **Target Section**: the value to input under this column indicates the path of the file; it indicates where the file will be located in the hierarchy once it's cataloged. (i.e. "Marketing Collateral\Production\BROKER DEALER")
- **File Name**: under this column the names of the files present in the Originals folder should be copied.
- **Table Name**: This informs the cataloger which metadata table is associated with this asset. Columns after the 'Table' column lists all the relevant fields from the metadata table. Fill the excel and carry out the final checks as mentioned below:
    - Do a final file count and ensure the numbers of files are the same in the Originals and Previews folders. If one file is missing in either folder, the program will abort.
    - Verify that the names of the files are correct. Ensure that all the file extensions are correct. Please use the file format chart provided in earlier chapter.
    - Verify that Target Section, Filename and metadata table are proper .The metadata table name should be in uppercase.
    - Please check if all the values in the Excel spreadsheet exist in the system.
    - In case of multi-facet input, fill up the second worksheet using the same Target Section and File Name as mentioned in the first worksheet. The Table Name and the Metadata fields will be different in this worksheet. The program will check the combination of Target Section and File Name and will associate multi-facet to the same asset.



Target Section	File Name	Expiry Date	Table Name	COPYRIGHT	MEDIA_LANGUAGE	EXPIRED	DATE_EXPIRED
Brand Material\Categories	10004673.jpg	1/1/2008	COPYRIGHTS	Synta	English	No	1/22/2009
Brand Material\Buildings\Headquarters	10005338.jpg	1/2/2008	COPYRIGHTS	Synta	English	No	1/22/2009
Brand Material\Buildings\Storage	10014549.jpg	1/3/2008	COPYRIGHTS	Synta	English	No	1/22/2009
Brand Material\Buildings\Research Cent	10016878.jpg	1/4/2008	COPYRIGHTS	Synta	English	No	1/21/2009
Brand Material\Buildings\Research Cent	10016893.jpg	1/5/2008	COPYRIGHTS	Synta	English	No	1/21/2009
Brand Material\Buildings\Research Cent	10017772.jpg	1/6/2008	COPYRIGHTS	Synta	English	No	1/17/2009

Figure No.28

To generate the Assetinfo file:

- Click on Tools option from the menu bar and select macros.
- Click on the Macros option. The macro dialog box is displayed.
- Click on the '**Run**' button. A Save As dialog box is displayed. Save the AssetInfo file at a desired location on your machine. Note: Once the AssetInfo file is in the relevant location, the actual process of cataloging begins.
- Copy the AssetInfo file to the relevant Job Folder or use FTP client application to transfer the file from your machine to the relevant Job folder on a FTP site hosting the SAS Marketing Operations Management application.

Submitting a Job

Job created by the user can be submitted to a catalog job folder called a **mountpoint** hosted on a server. Each user has a folder for submitting the catalog job; the folder name is the login name of the user. Following are 2 ways of submitting the catalog job:

Using Copy: The User can submit the job for cataloging by copying the job under the hierarchy Mount Point / Username folder.

Using FTP: Using FTP client application the user can transfer the job for cataloging under the hierarchy MountPoint / Username folder which is the FTP location for that particular user. For PC Users: Go to the ftp listed below using your web browser. **Mac Users**: Open the FTP Client you use to upload files to a FTP server (i.e.: Transmit, Cyber Duck).

Monitoring a Job

Active Jobs

After submitting the job for cataloging the user can check the status of the job in the Active Jobs screen. Traverse the link Click on '**Cataloger Job Status'** under the Tools Tab in the '**Digital Library'** solution. A Cataloger job Status screen is displayed **(Figure 27)**. Active Jobs screen allows the user to view job related details. Active Jobs are those jobs, which have the status as New Job, Released or In- Progress.

Tools: Cataloger Job Status

Job Status: Inactive

Jobs

Job Name	User Name	Job Status	Date Submitted	Submitted Asset(s)	Cataloging Completed	Error
Blue+hills_201282851157	Admin	Done	28 August 2012 02:42 PM	1	1	0
Water_201282823416	Admin	Done	28 August 2012 12:08 PM	1	1	0
Place_201282823359	Admin	Cancelled	28 August 2012 12:07 PM	1	0	0
Roses_201282823341	Admin	Done	28 August 2012 12:06 PM	1	1	0
Leaves_201282823326	Admin	Done	28 August 2012 12:06 PM	1	1	0
Green_201282823314	Admin	Done	28 August 2012 12:06 PM	1	1	0
niceday_201282823245	Admin	Done	28 August 2012 12:05 PM	1	1	0
Genuine_201282823231	Admin	Done	28 August 2012 12:05 PM	1	1	0
Blue+hills_201282823215	Admin	Done	28 August 2012 12:05 PM	1	1	0
proposal_small_201282823155	Admin	Done	28 August 2012 12:04 PM	1	1	0
Wildlife_201282823115	Admin	Done	28 August 2012 12:04 PM	1	1	0

Delete Refresh

Figure No.29

The details shown for the jobs are:

- **Job Name**: The name of the job being cataloged.
- **User Name**: The name of the user who has submitted the job for cataloging.
- Job Status: The current status of the job being cataloged.
- **Date Submitted**: The date at which the job was submitted.

The User can also cancel the jobs having status as Released which means that the processing of that job will not precede further.

Inactive Jobs

Inactive jobs are those jobs, which have the status as Done, Cancelled or Error. The details shown for the jobs are same as that of Active Jobs. The user can traverse the Error URL for jobs having status as error for finding the error.

Viewing Cataloging Errors

The errors that have occurred during the process of cataloging can be viewed in the Job Errors screen. The details shown on this screen are –

- Job **Name:** The name of the job having errors.
- **Username:** The name of the user who has submitted the job for cataloging.
- Time Submitted: The time at which the job was submitted.
- **File Name:** The name of the file for which the error occurred.
- **Error Description:** The description of the error.

Recovering Files with Errors

Whenever the cataloging of a particular job fails, all the files for which cataloging failed are moved to Error folder on the NTFS. The Error folder is present under the following hierarchy:

Mount Point

- Username
- Errors

The hierarchy of the Job Name and the Originals is maintained inside the Errors folder also so that the user can rectify the error and resubmit the job for cataloging.

Deleting Old Jobs

The Inactive Jobs screen shows all the Inactive jobs having status as Done, Cancelled or Error. The User can select the checkboxes of the jobs for deletion and Click on the button '**Delete Jobs**', all the selected jobs will be deleted.

Steps for Job Submission based on the File Format of the Digital Asset.

The steps for submission of a job for cataloging vary based on the file format of the Original Digital Asset. The following cases explain how various formats should be handled:

Case 1: Vector Graphics created in Illustrator, Quark etc. related to Packaging graphics (Artwork Mechanicals), Promotional brochures, etc.

- Create a job folder with two sub folders “Originals” and “Previews”
- Create PDF of the artwork as the Preview.
- Compress the artwork mechanical with linked images using Stuff-It (“.sit” format), for example, “Art1.eps.sit”
- Rename the PDF created in Step 2 using the naming convention described above (“Art1.eps.sit.pdf”).
- Move the Stuff-It file into the “Originals” folder.
- Move the PDF file into “Previews” folder.
- Fill in the Excel worksheet provided by SAS Marketing Operations Management with the required information and move it under the Job folder.
- Transmit the job folder either by FTP or on CDs/DVDs.

Case 2: Raster graphics in EPS format created in Photoshop (or other tools) for Product Photos, Logos, etc.

- Create a job folder with two sub folders “Originals”, “Previews”.
- Create low-resolution 72 dpi JPEG of the artwork as Preview.
- Compress the graphics file using Stuff-It (“.sit”) for example, “Art1.eps.sit”
- Rename the PDF created in Step 2 using the naming convention described above (“Art1.eps.sit.jpg”).
- Move the Stuff-It file into the “Originals” folder.
- Move the PDF file into “Previews” folder.
- Fill in the Excel worksheet provided by SAS Marketing Operations Management with the required information and move it under the Job folder.
- Transmit the job folder either by FTP or on CDs/DVDs.

Case 3: Raster graphics in JPEG, TIFF, etc. for Product Photos, Beauty Shots, high-resolution graphics, Logos, etc.

- Create a job folder with two sub folders “Originals” and “Previews”.
- Create low-resolution 72 dpi JPEG of the artwork as Preview.
- Rename the JPEG created in Step 2 using the naming convention described above.
- Move the graphics file into the “Originals” folder.

- Move the JPEG file into the “Previews” folder.
- Fill in the Excel worksheet provided by SAS Marketing Operations Management with the required information and move it under the Job folder.
- Transmit the job folder either by FTP or on CDs/DVDs.

Case 4: Digital Videos prepared for TV Advertisements etc.

- Create a job folder with two sub folders “Originals”, “Thumbnails”.
- Create low-resolution JPEG screen shot of the video as thumbnail. The size of the thumbnail should be around 150x150 pixel.
- Rename the JPEG created in Step 2 using the naming convention described above, for example, “Ad1.mov.jpg”.
- Move the video file into “Originals” folder.
- Move the JPEG file into “Thumbnails” folder.
- Fill in the Excel worksheet supplied by SAS Marketing Operations Management with the required information and move it under the Job folder.
- Transmit the job folder either by FTP or on CDs/DVDs disks.

Case 5: Microsoft Word, Excel or other Office documents prepared for product information etc.

- Create a job folder with only “Originals” sub folder.
- Move Office documents into “Originals” folder.
- Fill in the Excel worksheet provided by SAS Marketing Operations Management with the required information and move it under the Job folder.
- Transmit the job folder either by FTP or on CDs/DVDs.

Troubleshooting

Following are some of the errors that users may encounter while cataloging digital assets. The steps that may be taken to eliminate the errors are also mentioned.

- FileCount Not Found In AssetInfo File - This error is encountered when the FileCount tag in AssetInfo might be missing. This error can also occur if the end tag for FileCount is not given. Checks for filecount tag in the AssetInfo file also check for end tag for file count. If either of them is not present put the tag and submit the file for cataloging.

- Failed to catalog asset because asset is frozen - If an item is frozen then trying to catalog the same item gives this error. Unfreeze the item, which was frozen.

- User does not have create permission in this section - If the user does not have the privileges to create an item and the user tries to catalog an item then this error is logged. The user should be granted privileges to create an item.

- Unable To Create Target Section - The user specifies the Target Section in the AssetInfo file. If the Target Section does not exist then the cataloger attempts to create one for the user. If the Target Section cannot be created or if the user does not have rights to access the section in which he is trying to catalog the item then this error is logged. The target section specified in the AssetInfo file needs to be present before cataloging an item. If the vault is not present, create the vault and submit the job for cataloging. Also, ensure that the user has rights to access that vault/section.

- Error in generating preview - If the preview generation fails then this error is logged.

- Error in generating thumbnail -If the thumbnail generation fails then this error is logged.

- Failed to load AssetInfo File - If the AssetInfo file is not a well-formed xml, trying to load the AssetInfo file gives this error. Check the generated AssetInfo file. If it is not well formed, make changes in the file. Make it a valid XML i.e. every node in the AssetInfo file needs to have an end tag. Check for all the end tags and resubmit the job for cataloging.

- Invalid User found under the Mount Point - If a user folder present under the mount point does not exist in the system then this error is logged. Check if the user for which the folder is created is present or not, if not, then create the user in the system.

- Number of Files specified by the File Count in AssetInfo not arrived in time - If the number of files in Originals folder is less than the number of files specified in the AssetInfo file then the cataloger waits for a specific amount of time for the files to arrive. If the files do not arrive in specified amount of time then this error is logged. Transfer the remaining files in the Originals folder before the specified amount of time has elapsed. If the time has elapsed then resubmit the job with all the files specified in AssetInfo file in the Originals folder.

- Unable to open AssetInfo file - If the AssetInfo file is not present then this error is logged. The system waits for the AssetInfo file to arrive. 10 attempts are made to open the file. If after 10 attempts the AssetInfo does not arrive then this error is logged. Try submitting the job again for cataloging with proper AssetInfo file.

- Disk Full - If the file, which is being cataloged, has size more than the available disk space, then this error is logged. Contact System Administrator to ensure proper disk space is available.

- Recommendation of the Catalog Job Size – To catalog a job effectively it is recommended that the maximum limit of the number of the files in a job should be around 300. If the files that are submitted are of a bigger size then the cumulative size for the job should not exceed 1GB.

Check in Files from Network Folder

This feature in allows the users to upload digital assets from their machine into a network drive folder. Each user has folder by user login name. Under the login name folder there is separate area/folder for uploads and downloads. The upload folder is monitored by the application for arrival of a job and when a job is dropped for cataloging, it will automatically pick up the job and catalog it into the system.

Prerequisites for checking in files from the network folder:

- In the DAM settings under the settings (See admin guide section 9.13) for 'Support Network folder' should be set to 'Yes' and the network folder path should be specified and created.
- Under the network folder specified above, the user folders with their login names should be created.
- Under the user folders there should be two folders each: 'Upload' and 'Download'.
- While uploading the same concept as the batch cataloging needs to be followed. The job folder should contain the original, preview and the thumbnail folders with the assetinfo file.

Batch Cataloging using MOM Desktop

Product Info

MOM Desktop is an extended part of the SAS Marketing Operations Management solution, which is built on 'AIR' platform from Adobe. The MOM Desktop has a batch cataloging module (default), which helps to catalog digital assets in a bulk/batch into the Digital Library and associate metadata/business information to it (which is not possible through the web based solution).

File Sharing:

- Connects to the SAS Marketing Operations Management Cataloger Sever to transfer files selected by the user to catalog in the Digital Library.
- Connects to the SAS Marketing Operations Management Solution Server to validate the user and retrieve the Section hierarchy available for the user.

System Requirements for MOM Desktop:

- Windows XP, Windows Vista, Win2K, Windows 2008, Windows 7 or Mac OS.
- Minimum 5MB free disk space.

Installing MOM Desktop

On any screen of SAS Marketing Operations Management, click on the SAS logo on the top right corner of any screen of the SAS Marketing Operations Management application **(Figure 30)**.

Figure No.30

If the user is installing the MOM Desktop for the first time the click on the '**Install MOM Desktop**' button and click on '**Yes**'. If there is an installation already present on the user machine then the '**Upgrade MOM Desktop**' button with the version installed and the available version will be displayed. If the installation on the user machine and the server version is the same then the '**Launch MOM Desktop**' button is displayed.

When upgrading the MOM Desktop **(Figure 31)** is displayed where the installed version and the version to be installed will be displayed. By clicking on '**More Options**' two more buttons are displayed. The '**Uninstall**' button removes the application from the user's machine and the '**Run Now**' button runs the version already installed on the user's machine.

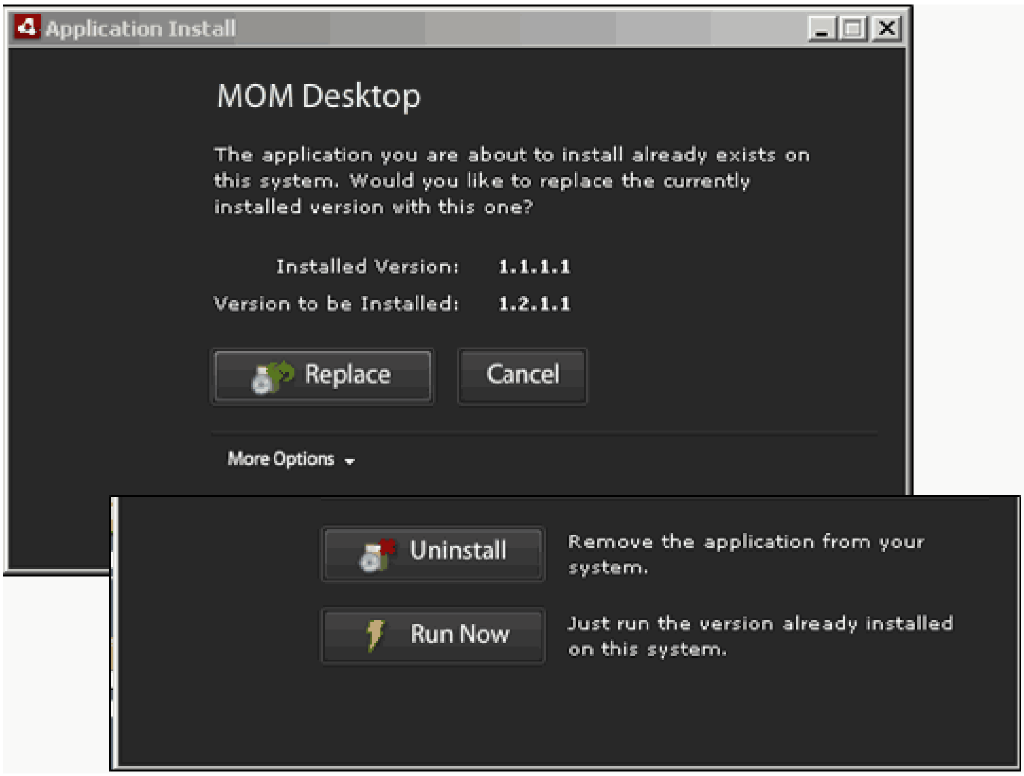


Figure No.31

After the installation is completed, fill in the preference details such as login, password, server, tenant and save the preferences **(Figure 31)**. The user preferences for cataloging on the Desktop can now be cached optionally.

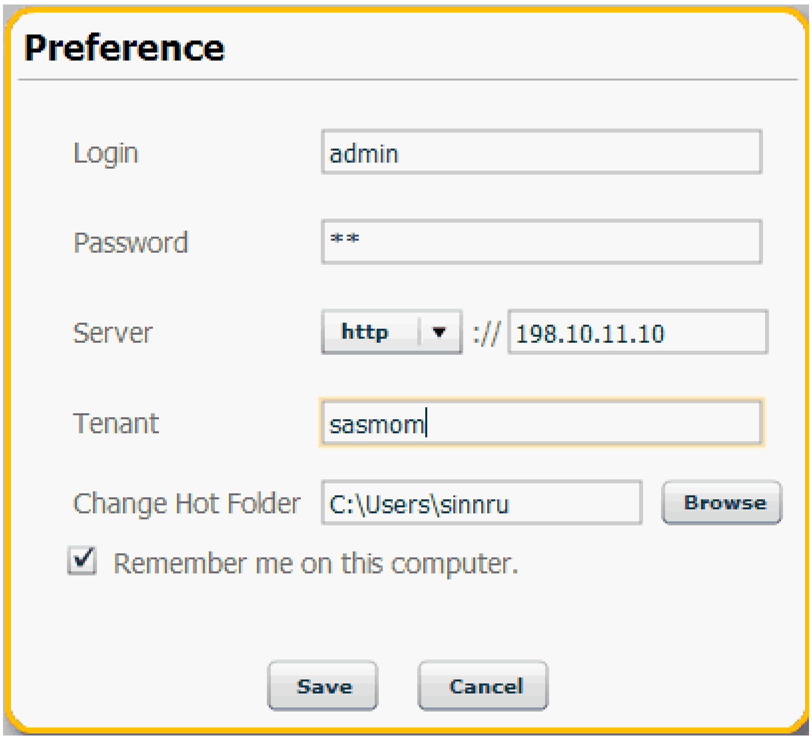


Figure No.32

Enter the ‘Hot Folder’ details. Hot folder is the location from where the files will be picked up for cataloging from your local machine. Save the preferences.

After saving the preferences an MOM Desktop screen is displayed. The following operarions can be performed on this screen **(Figure 33)**:

- **Preferences**: The preferences can be edited. The preferences can be changed according to the server you are using.
- **Options**: All the jobs and settings can be cleared and the user to create fresh preference settings or track a fresh list of jobs.
- **Help**: An HTML help file is displayed which gives an in depth information about how to use SAS Desktop.
- **About**: Displays the version number of SAS Desktop currently being used.
- **Delete**: The selected job can be deleted.
- **Resync**: Any newly created sections and facets in DAM are reflected on the Desktop.
- **Refresh**: Refreshes the screen.
- **New Job**: Creating a new job.

Figure No.33

Creating new Jobs

After clicking on the ‘**New Job**’ button, **(Figure 34)** is displayed where the original, preview and thumbnail files can be dragged and dropped.

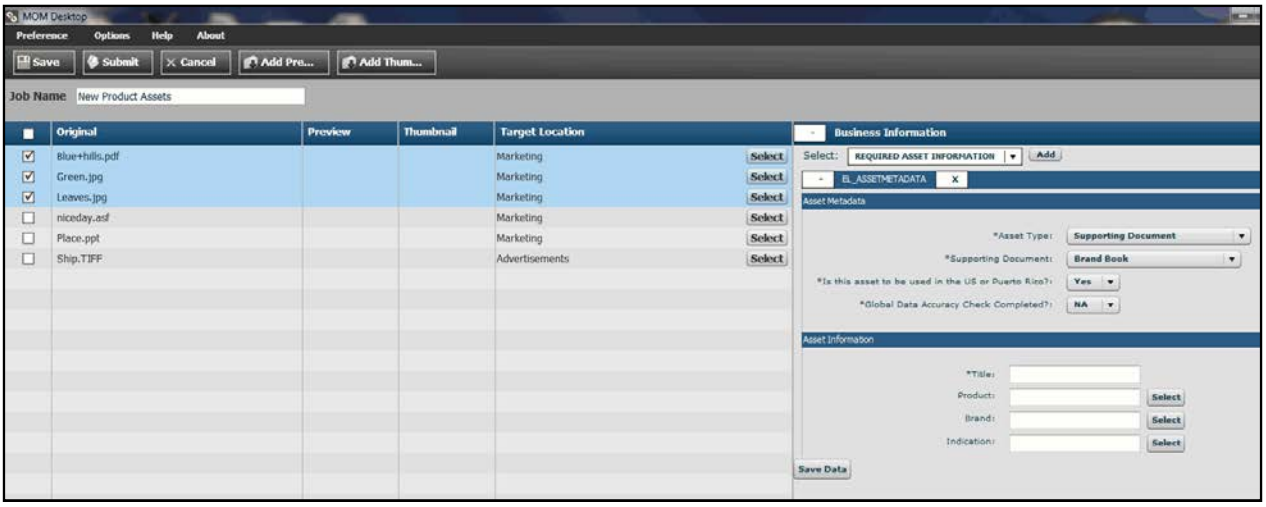


Figure No.34

Multiple original files can be dragged and dropped. By clicking on the ‘**Add Preview**’ and ‘**Add Thumbnail**’ buttons multiple files can be selected and dropped for the previews and the thumbnails providing the previews and thumbnails have the same name as the original files with the extension for the preview and the thumbnail, these files get associated with the original files automatically. For example, if the original file name is Image.jpeg then the preview will be Image.pdf and thumbnail will be Image.jpeg.

The target location can be selected by clicking on the '**Select**' button. A popup with the existing sections is displayed. The user can select from the existing sections or create a new section by selecting an existing vault/section and then clicking on the '**Create Section**' button **(Figure 35)**. Enter the section name and click on the done button **(Figure 36)**.

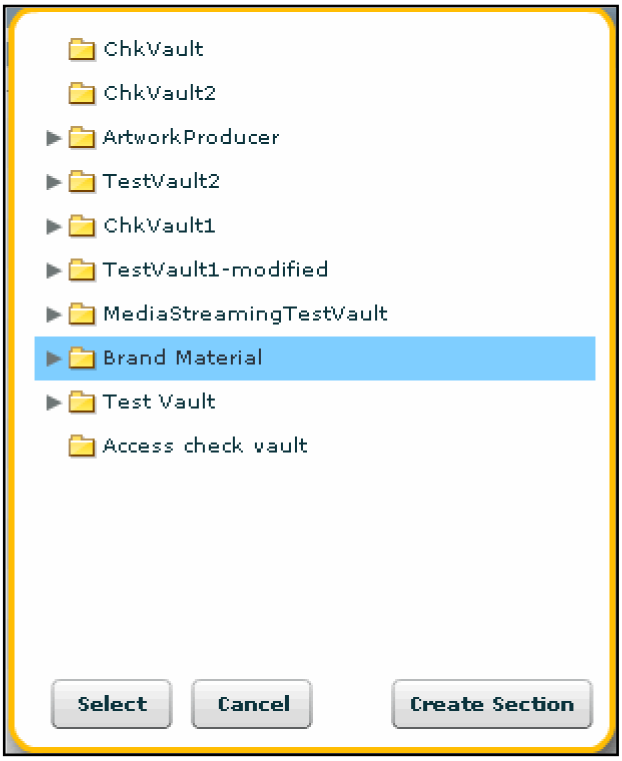


Figure No.35

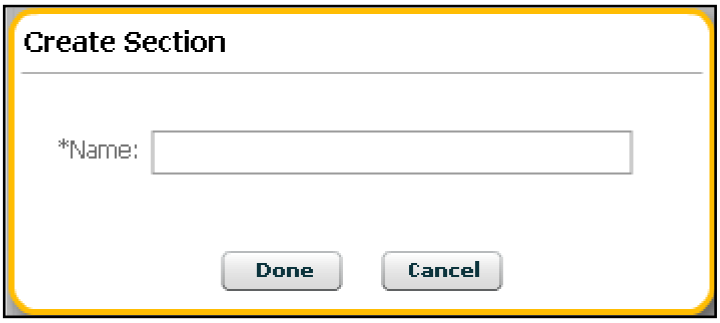


Figure No.36

(Figure 34) Facets/facet series can be selected for an asset. Save the facets/facet series by clicking on the '**Save Data**' button and expiry date can be specified for the asset.

Once all the file are dropped the user can save the job by clicking on the '**Save**' button and edit it later or by clicking on the '**Submit**' button submit the job for cataloging.

The jobs submitted for cataloging from the Desktop application reflects the status of cataloging in sync with the cataloger job status screen in the DAM application. The job list displays whether the job is released, in progress, done, cancelled or in error state as the cataloging proceeds.

FAQ

Q1) Does MOM Desktop download or pass any information from the user's laptop to the outside world without informing user. Does it runs any service or routine in the background on the users laptop which might affect their confidential data store on the network?

A1) There is no service running in the background. The application remains passive on the users laptop until it is opened by the user. The application invokes the SAS Marketing Operations Management server only when the user drags and drops assets and requests for cataloging to be done. It does not utilize or pull in any system information. The user has to drag and drop assets onto it for it to function. MOM Desktop application comes with an automatic update facility. When any new version of the application is installed on the server, the Desktop utility will automatically download the update and ask the user whether the update needs to be installed. If the user chooses to do so, the latest version of the Desktop application will be installed on the users machine.

Reports

The reports display a list of activities by users on digital assets and related entities such as sections, vaults etc.

To launch the reports click on '**Reports**' on the dashboard screen under MOM. Lists of existing reports for Strategic Planner are displayed by default.

Click on the digital Library link on the left pane to launch digital library activity reports **(Figure 37)**.

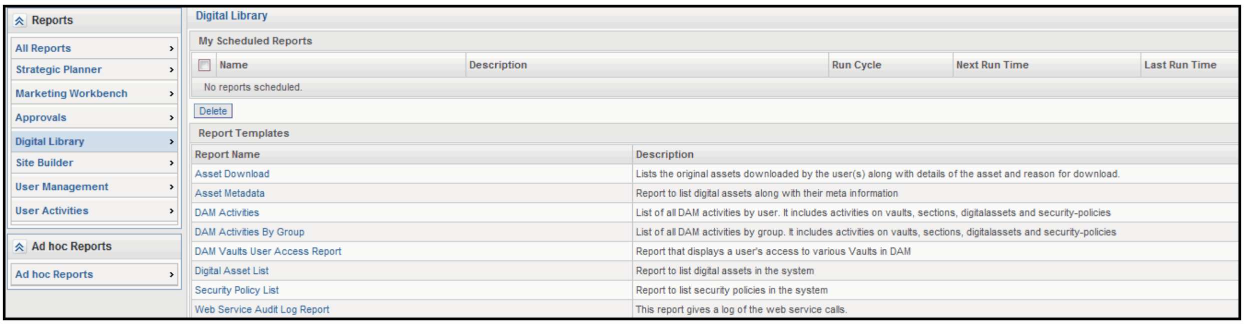


Figure No.37

Click on each report and add the filters and generate the reports.

Once the report is generated user can export the report in Word, PDF or Excel.

Claims Management

The Claims Management product empowers the Regulatory Departments in Marketing Organizations to create a common, active, up to date Regulatory Claims Database (RCD) information system for all label claims.

This product will enable Regulatory Department keep an online track record of all approved Claims and their associated Labels that reside in the SAS Marketing Operations Management Digital Library as digital assets.

Key Benefits:

1. Creates an easy searchable method for determining what claims are currently in the market.
2. Creates consistency across all brands, by creating more label-development visibility between the divisions
3. Allows for the ability to historically track a SKU product label claim change through time.

Glossary of Terms:

Labels: Labels are a part of the packaging of products. For e.g. Food Products bear labels that contain nutrient content claims and certain health messages to comply with specific requirements. The Nutrition Labelling and Education Act (NLEA) require most foods to bear nutrition labelling.

Claims: Claims are statements made on the label of products. The Dietary Supplement Health and Education Act states that dietary supplement may bear certain statements on its label or in its labelling if the claim meets certain requirements. For e.g. Nutrient Claims - It is a claim on a food product that directly or by implication characterizes the level of a nutrient in the food (e.g., "low fat," "high in oat bran," or "contains 100 calories").

Disclosures: It is a statement that calls the consumer's attention to one or more nutrients in the food that may increase the risk of a disease or health-related condition that is diet related. The disclosure statement is required when a nutrient content claim is made and when a nutrient in that food exceeds certain prescribed levels. The disclosure statement identifies that nutrient (e.g. "See nutrition information for sodium content").

References: References are links from the Label information or Claim information in the SAS Marketing Operations Management Claims repository to the Packaging Artwork (Digital Asset) in the Digital Library that actually contains the Claim. Several digital assets in the Digital Library could be linked or referencing the Claim.

Claims

View Claims

Click on the '**View Claims**' link on the left pane, a 'View Claims' screen is displayed **(Figure 1)**.

Figure No.1

A list of claims present in the system is displayed. You can search for a specific claim by entering the criteria in the 'Search' section and clicking on the '**Search**' button.

Click on the claim name link on the list screen to view the details of the claim. A 'View Claims' screen is displayed with the claim information and the references attached to the claim in the 'Info' tab **(Figure 2)**. You can perform the following operations on this screen:

- If any changes have been the made to the claim details the system stores the changes made in the audit log. To view these logs click on the '**View Audit History**' link.
- The claim details can be emailed by clicking on the '**Email**' button. The email can be sent to the user of the system as well as non-system users.
- The references linked to the claim are displayed. The original version of the asset as well as the preview can be downloaded. The asset information can be viewed.
- You can go back to the label list screen by clicking on the '**Back to List screen**' button.

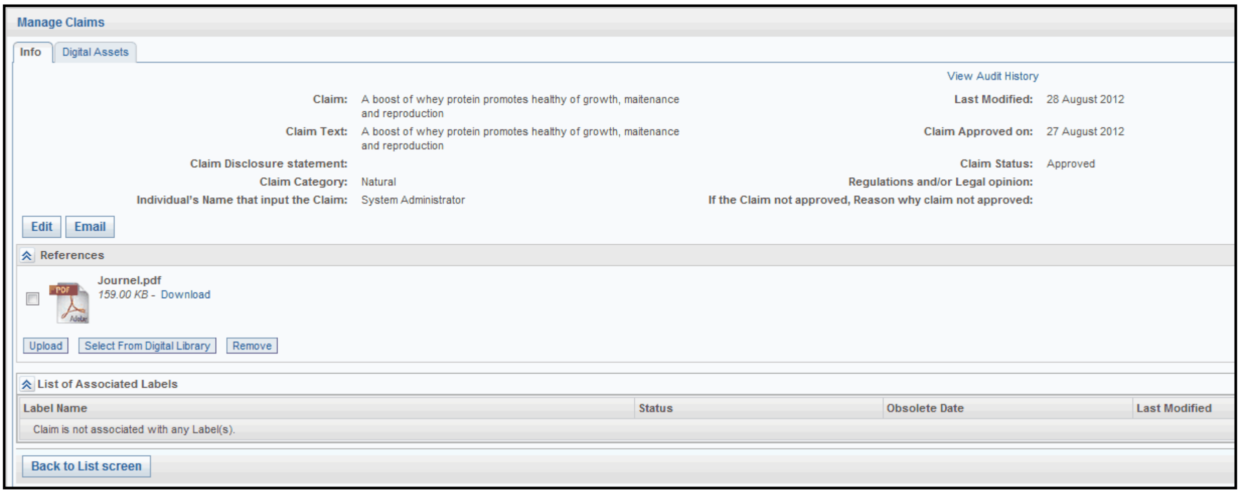


Figure No.2

To view the digital assets to which the label is linked to, go to the 'Digital Assets' tab.

Manage Claims

To create new claims click on the '**Manage Claims**' link on the left pane **(Figure 3)**. A 'Manage Claims' screen is displayed on which claims can be searched for by the Regulatory users. The claims created are listed out and displayed.

Figure No.3

Create new claim by clicking on the '**Create Claim**' button.

A 'Manage Claims' screen is displayed **(Figure 4)**. Enter details such as claim, claim text, claim disclosure statement, claim category, individual's name that input the claim, last modified (date the claim was last modified), the status (draft, approved, did not go to market and obsolete), regulations and/ or legal opinion and if the claim was not approved with the reason why the claim was not approved. References can be added from the Digital Library or uploaded.

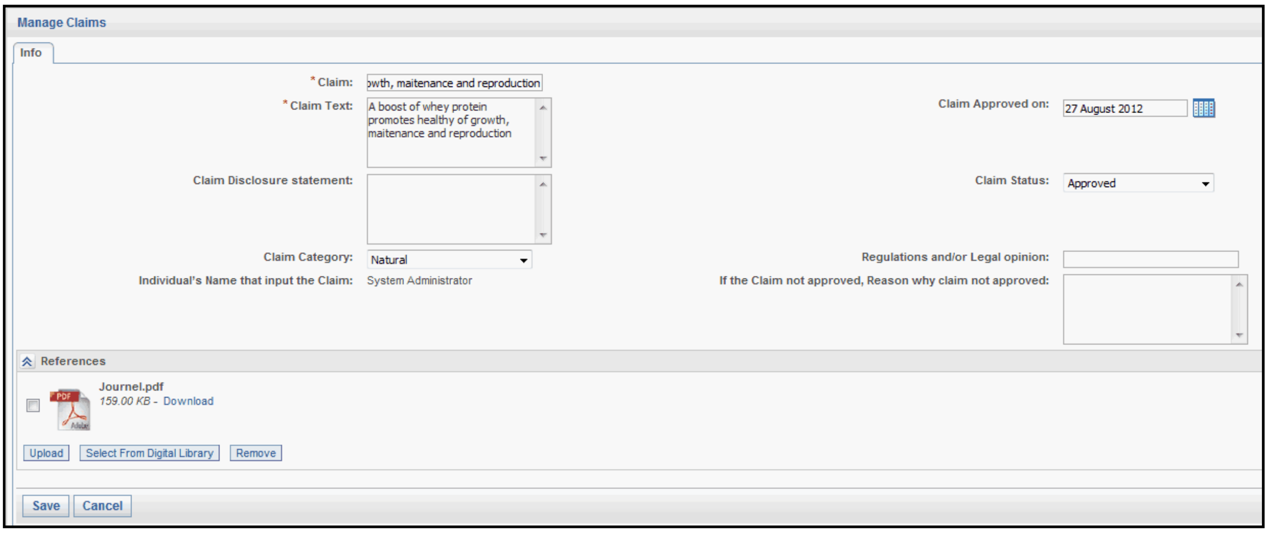


Figure No.4

After entering all the details the Claim can be saved by clicking on the '**Save**' button. A 'Manage Claims' screen with the claim details in the 'Info' tab will be displayed in a read only format **(Figure 5)**.

The claim details can be edited/modified by clicking on the '**Edit**' button. The claim details can be emailed by clicking on the '**Email**' button. The email can be sent to the user of the system as well as non-system users.

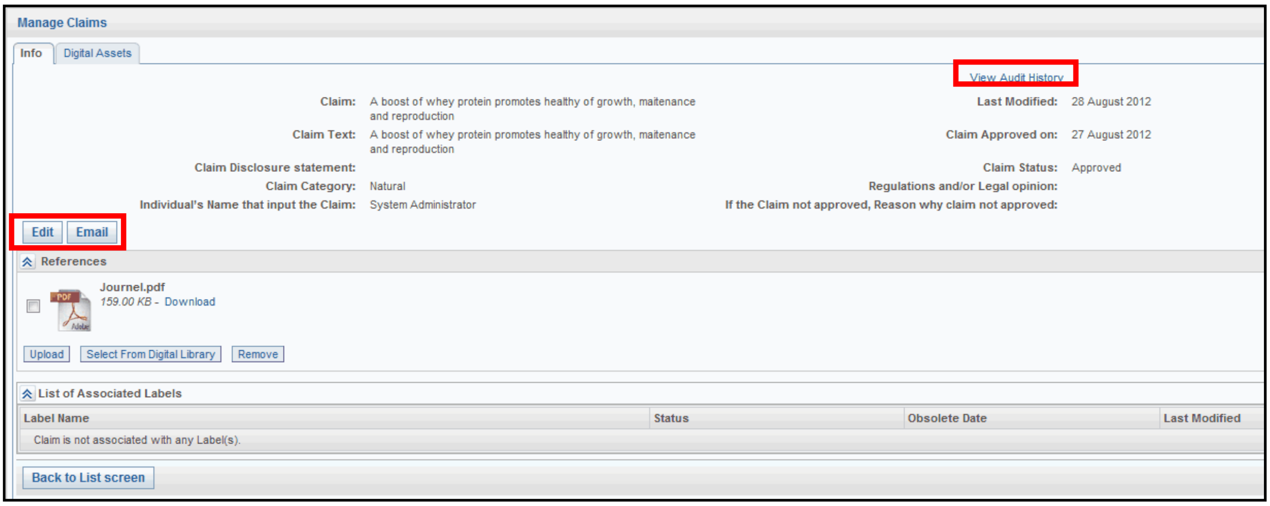


Figure No.5

If any changes have been the made to the claim details the system stores the changes made in the audit log. To view these logs click on the '**View Audit History**' link.

Claims can be associated with assets from the Digital Library.

Go to the 'Digital Assets' tab on the 'Manage Claims' screen to associate the claim with assets from the Digital Library.

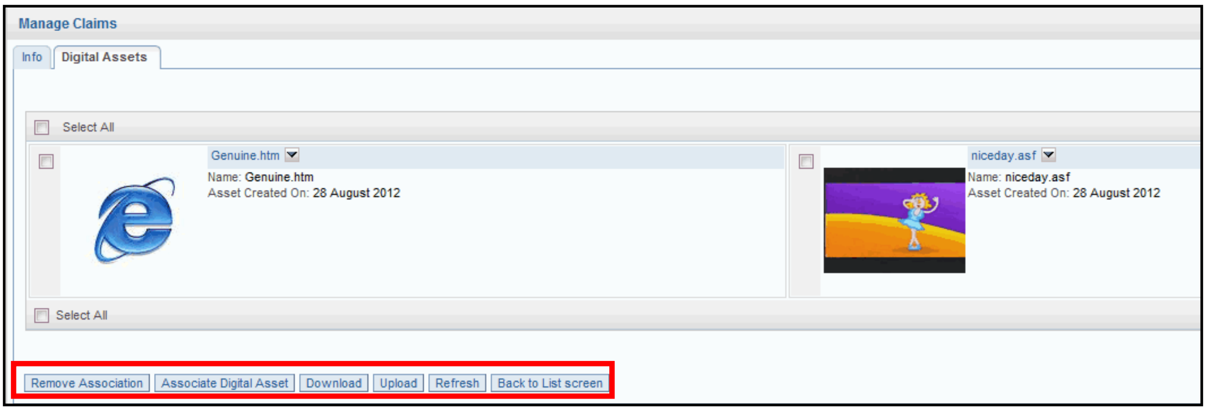


Figure No.6

The following actions can be performed on the 'Digital Library' tab **(Figure 6)**:

- **Remove Association** – The association between the asset and the claim can be removed by selecting the asset and clicking on the '**Remove Association**' button.
- **Associate Digital Asset** – Associate assets to the claim by clicking on the '**Associate Digital asset**' button. A 'Select Digital Assets' popup is displayed from where the assets can be selected to be associated to the label. Select the assets and click on the '**Select**' button **(Figure 7)**.

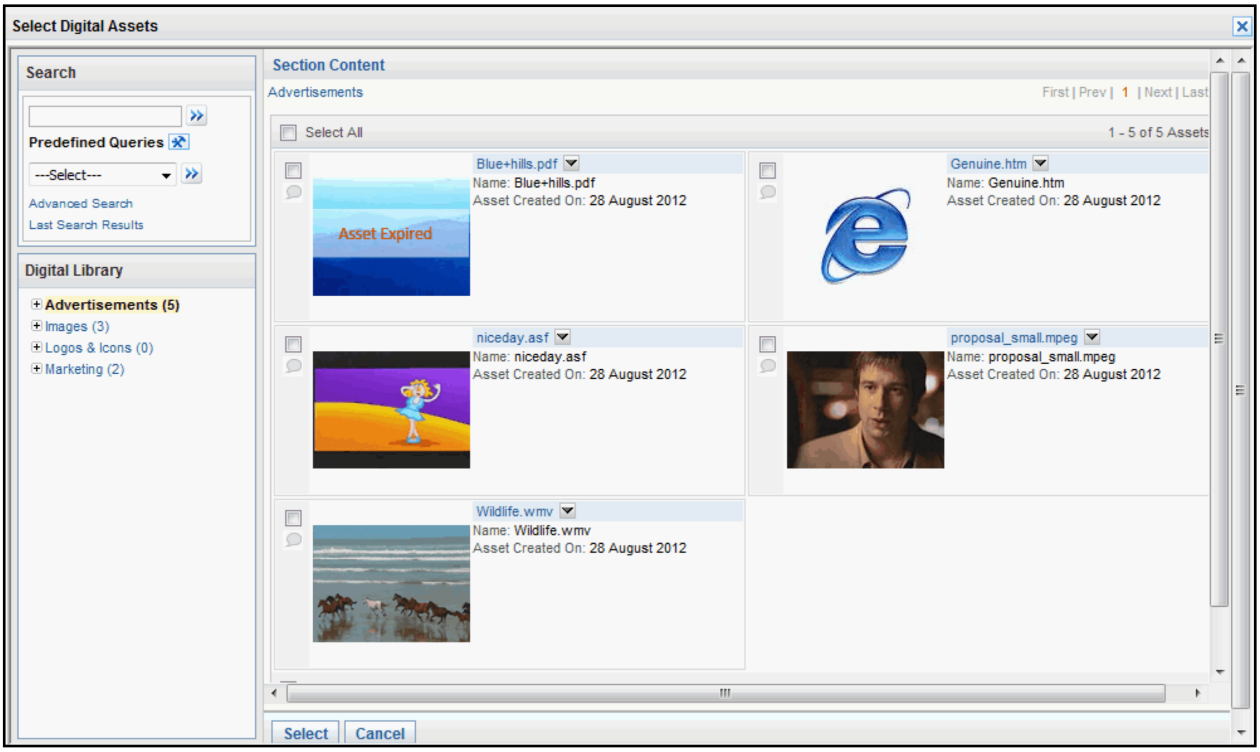


Figure No.7

- **Download** – The selected digital assets can be downloaded.
- **Upload** – New assets can be uploaded by clicking on the '**Upload**' button. An 'Upload Digital Asset' popup is displayed **(Figure 8)**. You can select the section the asset needs to be uploaded and upload the original version of the asset which is mandatory. The preview and thumbnail can be uploaded or it will be generated

by the system. Enter the expiry date, description and select the business information to be attached from the drop down box and click on the ‘**Add**’ button. Click on the ‘**Save**’ button to upload the asset.

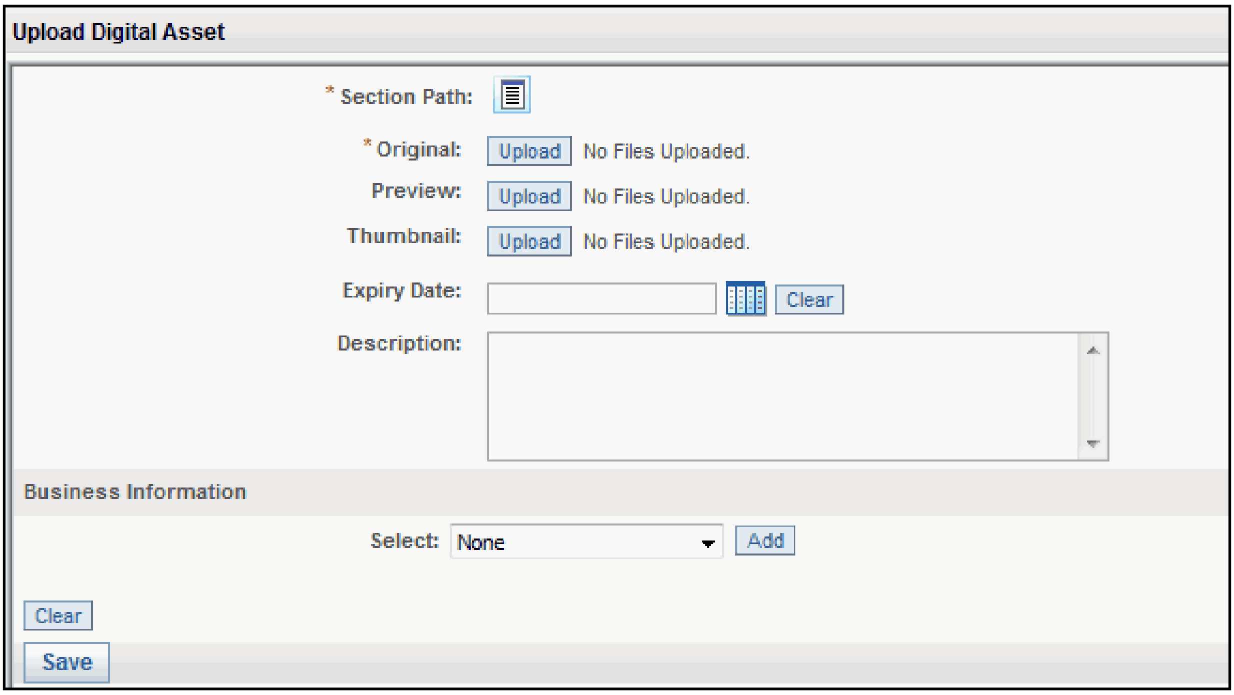


Figure No.8

- **Refresh** – Refreshes the screen.
- **Back to the List screen** – Takes you back to the ‘View Labels’ list screen.

Note: You can download or upload assets depending on the access rights you have on the assets and the section in the digital library.

Labels

View Labels

If the ‘Enable Labels’ setting is set to ‘Yes’ and if the logged in user has access to labels then by default the ‘View Labels’ screen is displayed.

Figure No.9

A list of labels present in the system is displayed. You can search for a specific label by entering the criteria in the ‘Search’ section and clicking on the ‘**Search**’ button.

Click on the label name link on the list screen to view the details of the label. A ‘View Labels’ screen is displayed with the label information, the references attached to the label and the associated claims in the ‘Info’ tab **(Figure 10)**. You can perform the following operations on this screen:

- The label details can be emailed by clicking on the ‘**Email**’ button. The email can be sent to the user of the system as well as non-system users.
- If any changes have been the made to the label details the system stores the changes made in the audit log. To view these logs click on the ‘**View Audit History**’ link.
- The references linked to the label are displayed. They original version of the asset as well as the preview can be downloaded. The asset information can be viewed.
- By clicking on the Claim name link the details of the claims linked to the label can be viewed.
- You can go back to the label list screen by clicking on the ‘**Back to List screen**’ button.

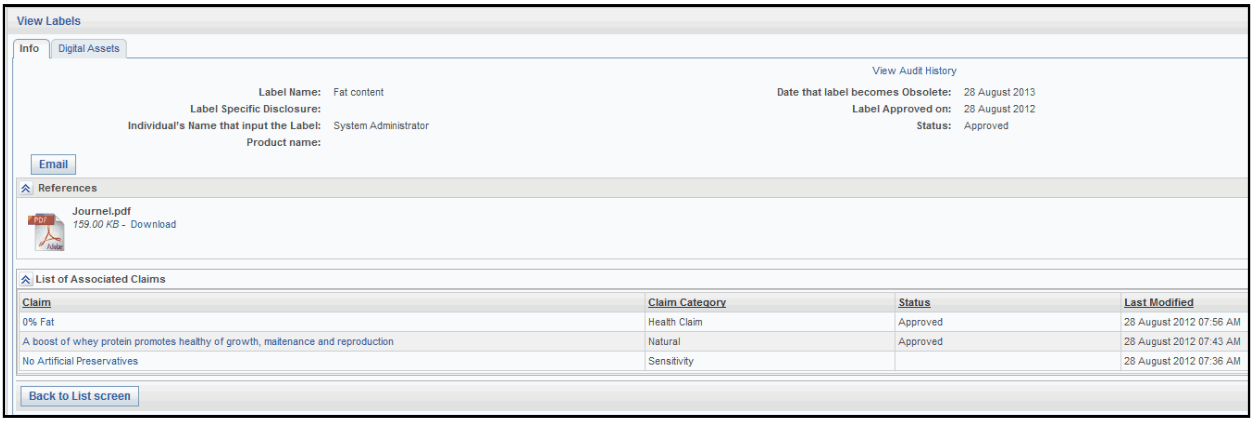


Figure No.10

To view the digital assets to which the label is linked to, go to the ‘Digital Assets’ tab.

Manage Labels

If the ‘Enable Labels’ setting is set to ‘Yes’ then the labels link will be visible in ‘Claims Management’ on the left pane.

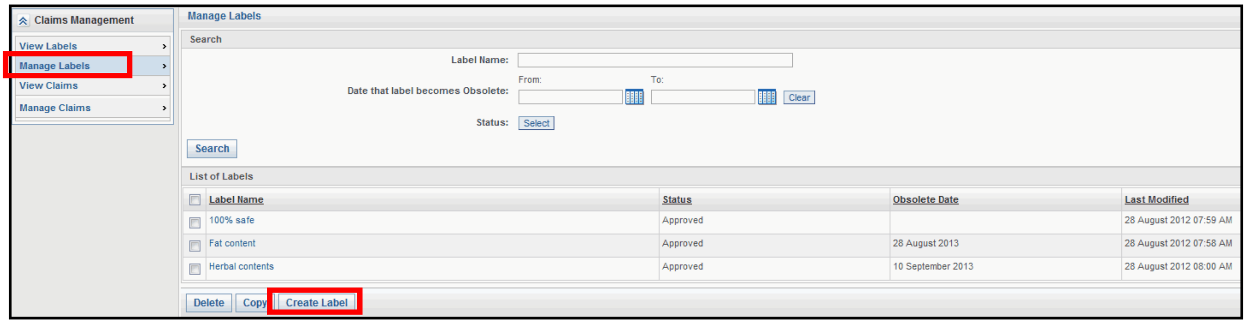


Figure No.11

To create new labels click on the ‘**Manage Labels**’ link on the left pane. A ‘Manage Labels’ screen is displayed on which there is a search available. The labels created are listed out and displayed. Click on the ‘**Create Label**’ button.

A ‘Manage Labels’ screen is displayed. Enter details such as label name, label specific disclosure, product name, date that label becomes obsolete (when the label expires), label approved on (the date on which the label was approved) and the status (draft, approved, did not go to market and obsolete). References can be added (From the Digital Library) or uploaded.

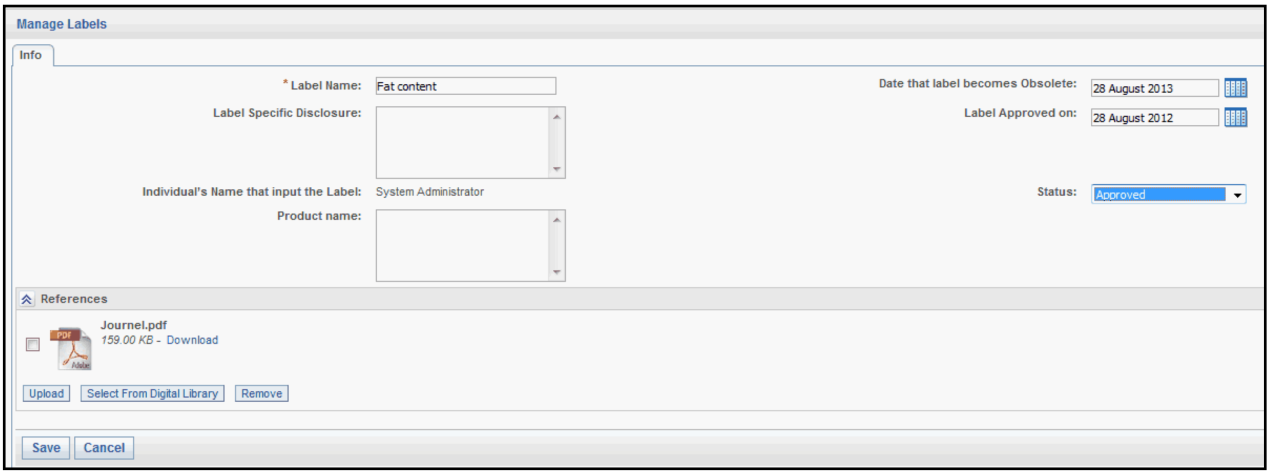


Figure No.12

After entering all the details the Label can be saved by clicking on the ‘**Save**’ button. A ‘Manage Labels’ screen with the label details and the associated claims in the ‘Info’ tab will be displayed in a read only format **(Figure 13)**. The label can be edited/modified by clicking on the ‘**Edit**’ button. The label details can be emailed by clicking on the ‘**Email**’ button. The email can be sent to the user of the system as well as non-system users.

If any changes have been the made to the label details the system stores the changes made in the audit log. To view these logs click on the ‘**View Audit History**’ link.

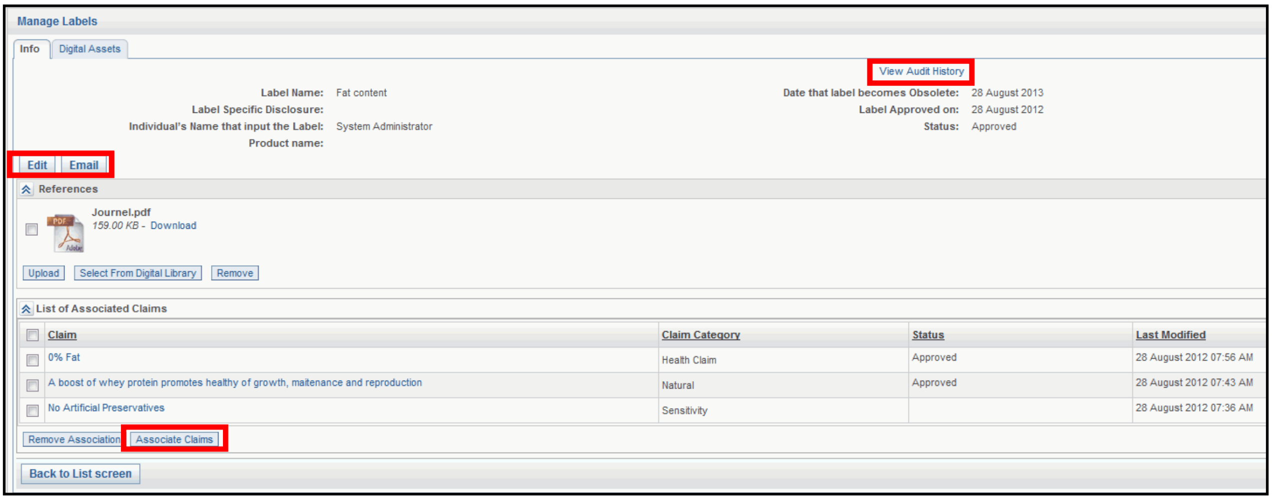


Figure No.13

Claims can be associated to labels by clicking on the ‘**Associate Claims**’ buttons. A view claims popup is displayed **(Figure 14)**.

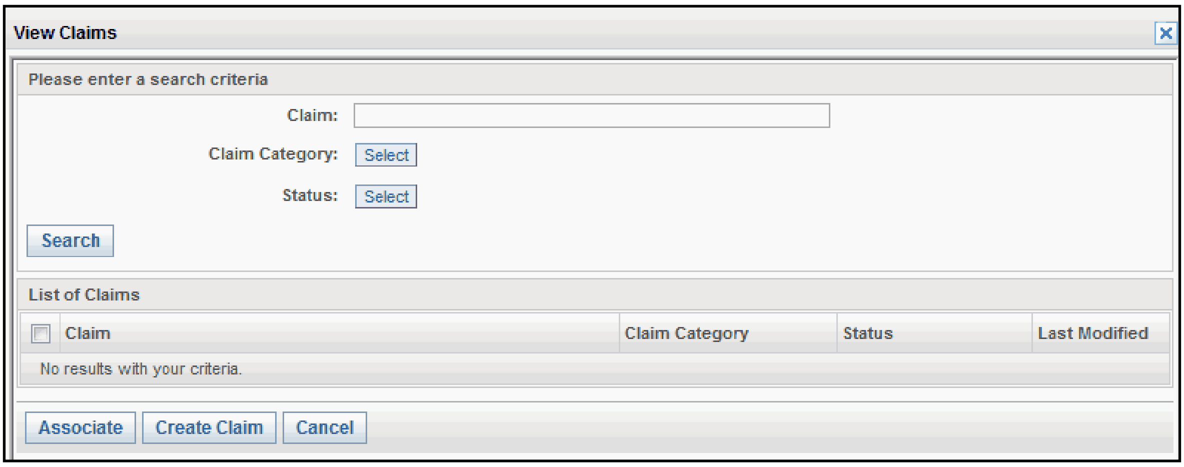


Figure No.14

Multiple claims can be associated to a single label. Labels can be associated to assets from the Digital Library. Go to the 'Digital Assets' tab on the 'Manage Labels' screen to associate the label with assets from the Digital Library.

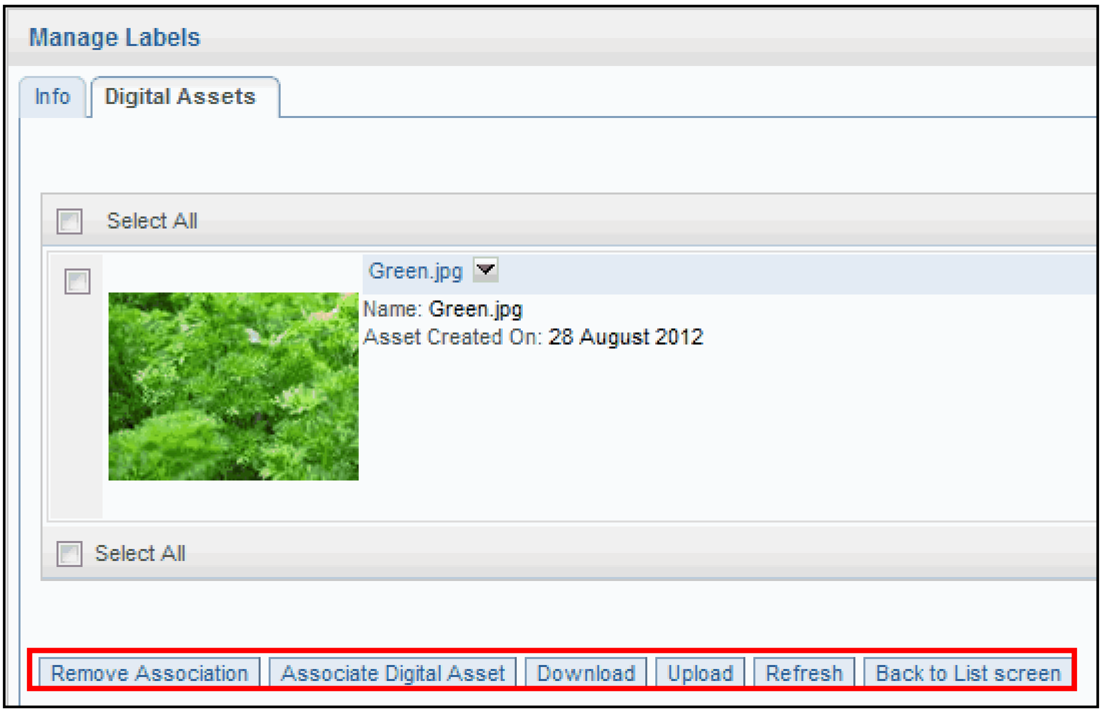


Figure No.15

The following actions can be performed on the 'Digital Assets' tab:

- **Remove Association** – The association between the asset and the label can be removed by selecting the asset and clicking on the '**Remove Association**' button.
- **Associate Digital Asset** – Associate assets to the label by clicking on the '**Associate Digital asset**' button. A 'Select Digital Assets' popup is displayed from where the assets can be selected to be associated to the label. Select the assets and click on the '**Select**' button **(Figure 16)**.

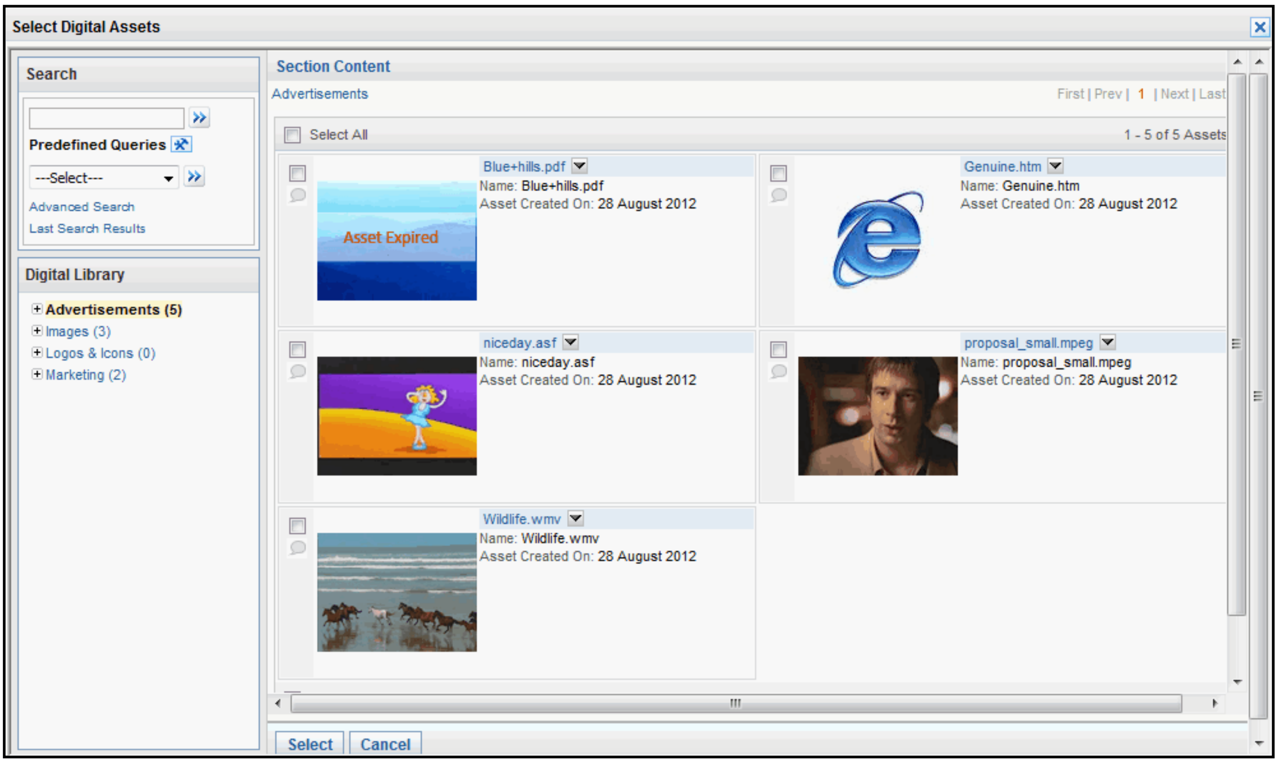


Figure No.16

- **Download** – The selected digital assets can be downloaded.
- **Upload** – New assets can be uploaded by clicking on the '**Upload**' button. An 'Upload Digital Asset' popup is displayed **(Figure 17)**. You can select the section the asset needs to be uploaded and upload the original version of the asset which is mandatory. The preview and thumbnail can be uploaded or it will be generated by the system. Enter the expiry date, description and select the business information to be attached from the drop down box and click on the '**Add**' button. Click on the '**Save**' button to upload the asset.

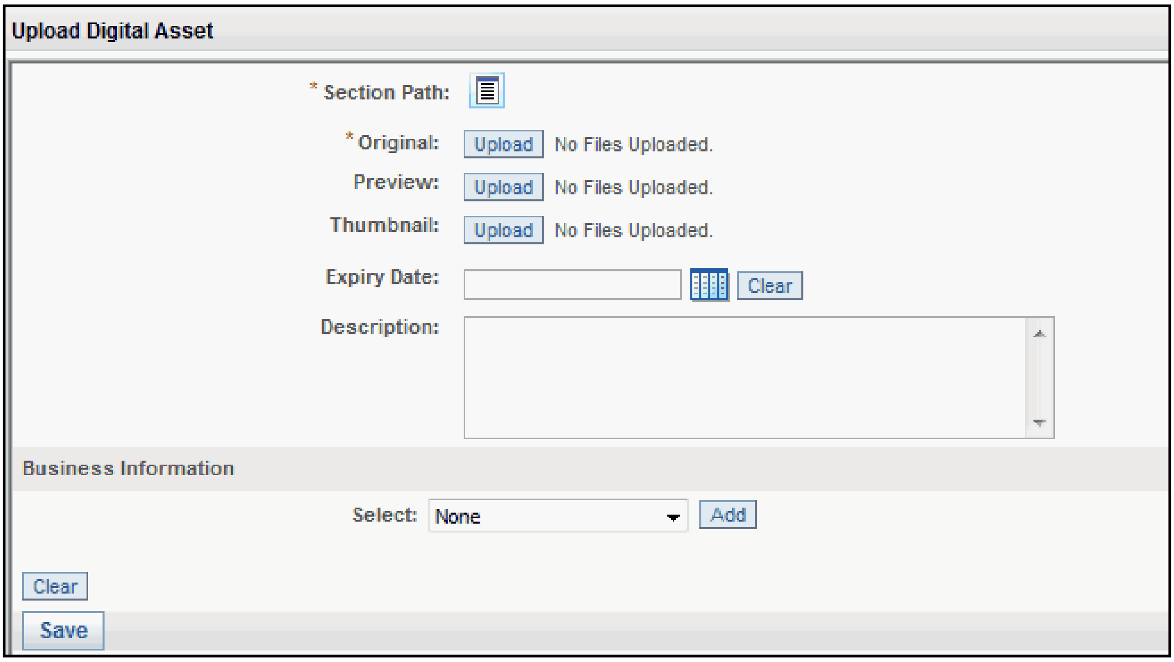


Figure No.17

- **Refresh** – Refreshes the screen.
- **Back to the List screen** – Takes you back to the **‘**View Labels’ list screen.

Note: You can download or upload assets depending on the access rights you have on the assets and the section in the digital library.

After the labels are created and associated with claims and digital asset, the user can view the labels by going to the ‘View Labels’ link on the left pan of the ‘Claims Management’ solution screen.

Claims and Labels in Digital Library

If the Claims and Labels setting are set to ‘Yes’ and the ‘Show Claims Tab in DAM’ and ‘Show Labels Tab in DAM’ settings are set to ‘Yes’ then two extra tabs are visible in the Asset information of an asset in the digital library. These tabs display the labels/claims details associated with the Digital Asset.

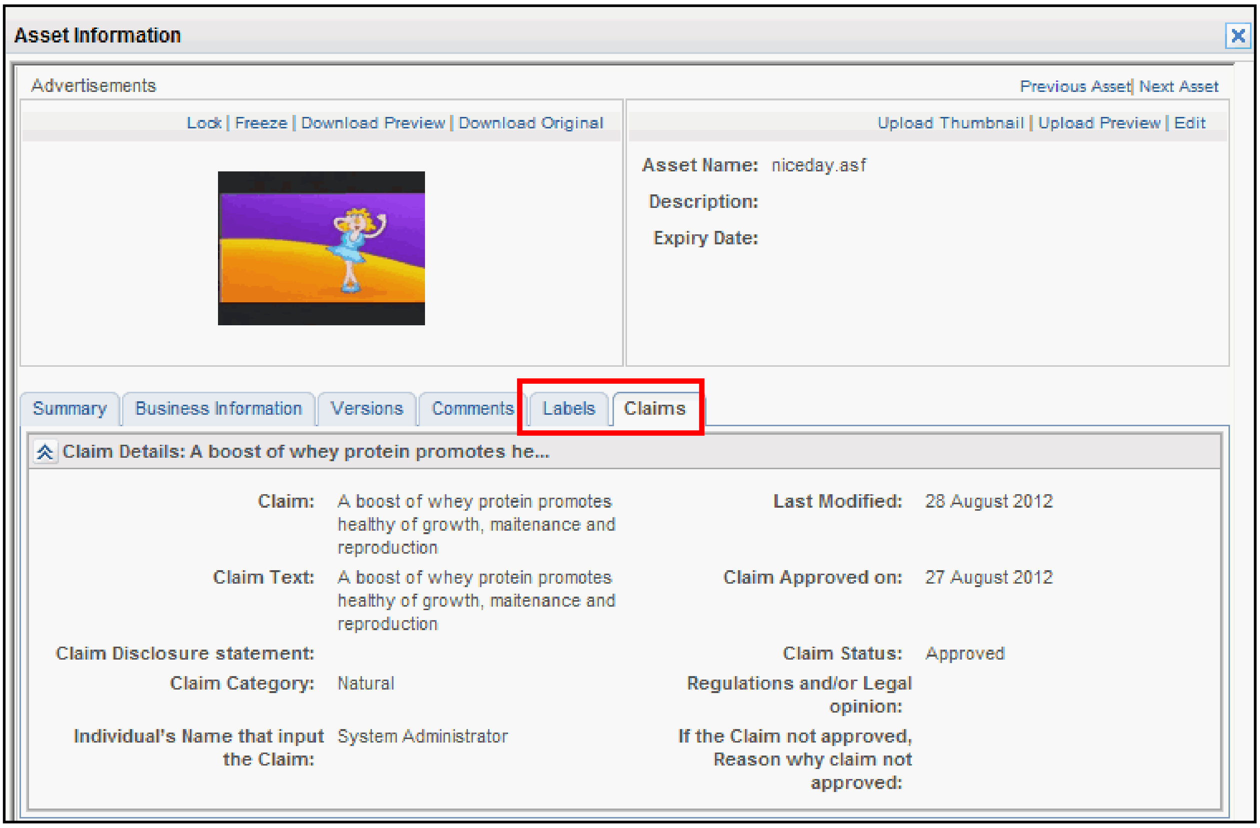
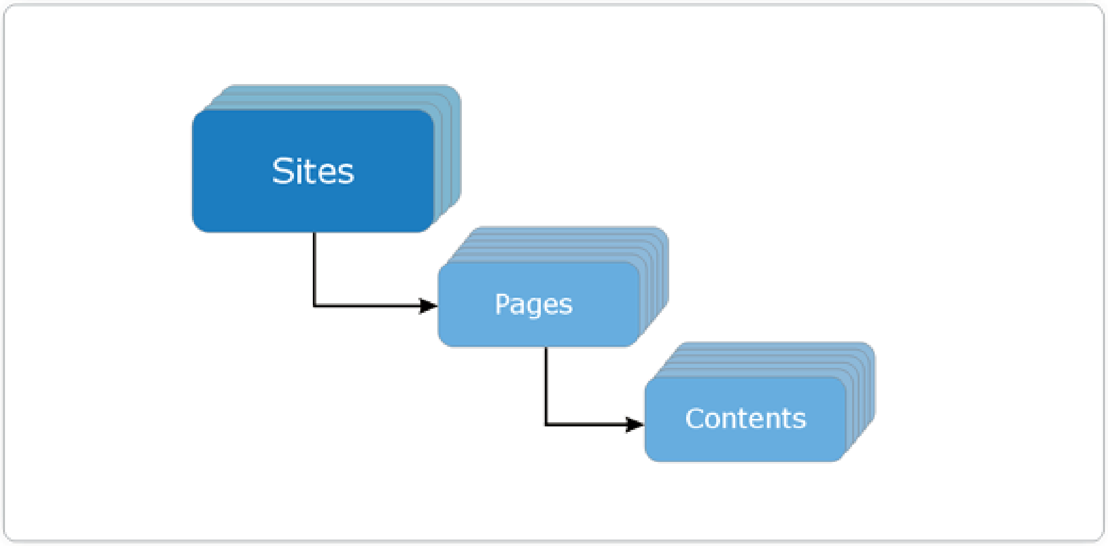


Figure No.18

Note: Claims and label information can be imported into the system using the Import data utility.

Site Builder

Overview



Product Marketing Managers need to keep team members up to date on current information. It is a constant challenge in a distributed enterprise environment. The most effective solution is to provide a source of organized information that is easy to access through browser. Site Builder enables the marketing team to build brand, product or service websites without requiring any knowledge of HTML or Internet technologies. With Site Builder, a novice user can quickly set up a comprehensive and informative site that is packed with important and relevant information that can be accessed globally.

Site builder allows the user to create web sites, which is collection of connected site pages. A site page or a page in simple term represents the contents of the site. Each page has page elements/components like rich/formatted text, images etc which makes up for the content of the page.

Glossary of Terms

Site - A set of web Pages, usually including a homepage, generally located on the same server, and prepared and maintained as a collection of information by a person, group, or organization.

Page - A Page is a document that contains text and graphical information that can be accessed through the Internet through a web browser. A Site can comprise of several Pages.

Review - A review is a process conducted to invite comments from different key personnel in the organization on different aspects of a certain issue. For example: The Site is published and comments are invited

Roles in Site Builder

- **Owner** – The user who creates the site.

- **Authors** – The users who are authorized to edit the site.
- **Allowed users** – The users who get access to view the site.
- **Allowed groups** – The user groups who get access to view the site.
- **Site Reviewers** – Reviewers are the users/groups added by the site creator while publishing a site for review. They have a read only access on the site content.

Getting Started

After signing in click on the '**Site Builder**' link provided on the Dashboard screen on the left pane to launch the Site Builder solution. The following screen is launched **(Figure 1)**.

Figure No.1

Left pane -The left pane has the following links:

Sites – Displays existing Sites and the user can create new Sites.

Review Sites – Displays a list of Sites to be reviewed.

Content Frame - It displays a list of existing Sites.

Managing Sites

When the user logs in the Site Builder application the existing Sites are displayed by default. Details such as the Site name, Updated On and whether Published are displayed. To view the Site, click on the '**View**' link **(Figure 2)**. Click on the '**Edit**' link **(Figure 2)** to edit the Site as well as create Pages for the Site.

Edit link is shown only to the Authors or the Owner of the Site. When the Author/Owner edits the Site, the site gets locked automatically and cannot be edited by any other user. When the Site is locked a message is displayed in the Site description column specifying the user who is editing the Site along with the date and the time **(Figure 2)**.

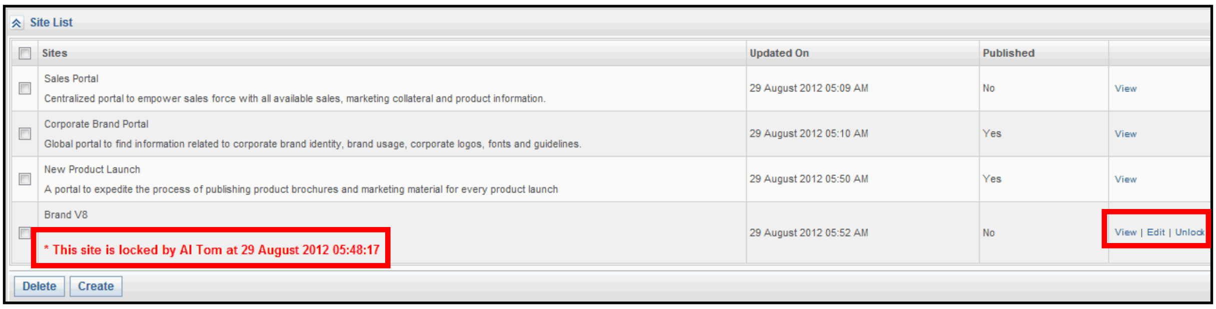


Figure No.2

Once the user exits the browser the Site is automatically unlocked. If the user does not come out of the Site by clicking on the '**Done**' button **(Figure 5)** the Site is locked. The Owner or the Author who has locked it can unlock the Site by clicking on the '**Unlock**' link **(Figure 2)**.

Creating New Sites

Click on the '**Create**' button at bottom of the Site List screen **(Figure 2)**. A Site Configuration screen is displayed which has the following sections **(Figure 3)**:

- **Name** - The name of the Site.
- **Description** – The Site description.
- **Login required** - Specify if the user who wants to view the Site requires a login. If yes then on accessing the Url the user will be required to login with a user name and password. If no then the user credentials are to be entered for anonymous login to the Site. The access privileges for the user need to be checked before publishing the Site.
- **Publish** - Select whether to publish the Site.
- **Owner** – The owner of the Site is displayed here.
- **Authors** – Authors can be added by clicking on the '**Add User**' button or the selected Authors can be deleted by clicking on the '**Delete**' button.
- **Upload Style Sheet** – Each Site can have a different look and feel, which can be achieved by applying a style sheet per Site. By default when a Site is created it inherits the clients look and feel through AlStyleSheet.css, which can be downloaded by the user. This style sheet can be changed based on the requirements of the Site and uploaded back. To upload click on the '**Browse**' button and then click on the '**Upload**' button.
- **Upload Supporting Images** – Clicking on the '**Upload**' button can upload the images referenced by the style sheet.
- **Footer** – The user can apply footer for the Site by clicking on the Checkbox and filling in the text. Alignment for the text can be done.
- **Dashboard Channel Configuration for Site** - Browsing and then clicking on the '**Upload**' button can upload the logo to be displayed on the Site.

To save the new Site click the '**Save**' button or to cancel click the '**Cancel**' button **(Figure 2)**.
When the Site is created and saved a screen with the default Home Page for the Site is displayed. The layout for the default Page can be configured using instructions specified in section on "**Configuring Page Layout**".

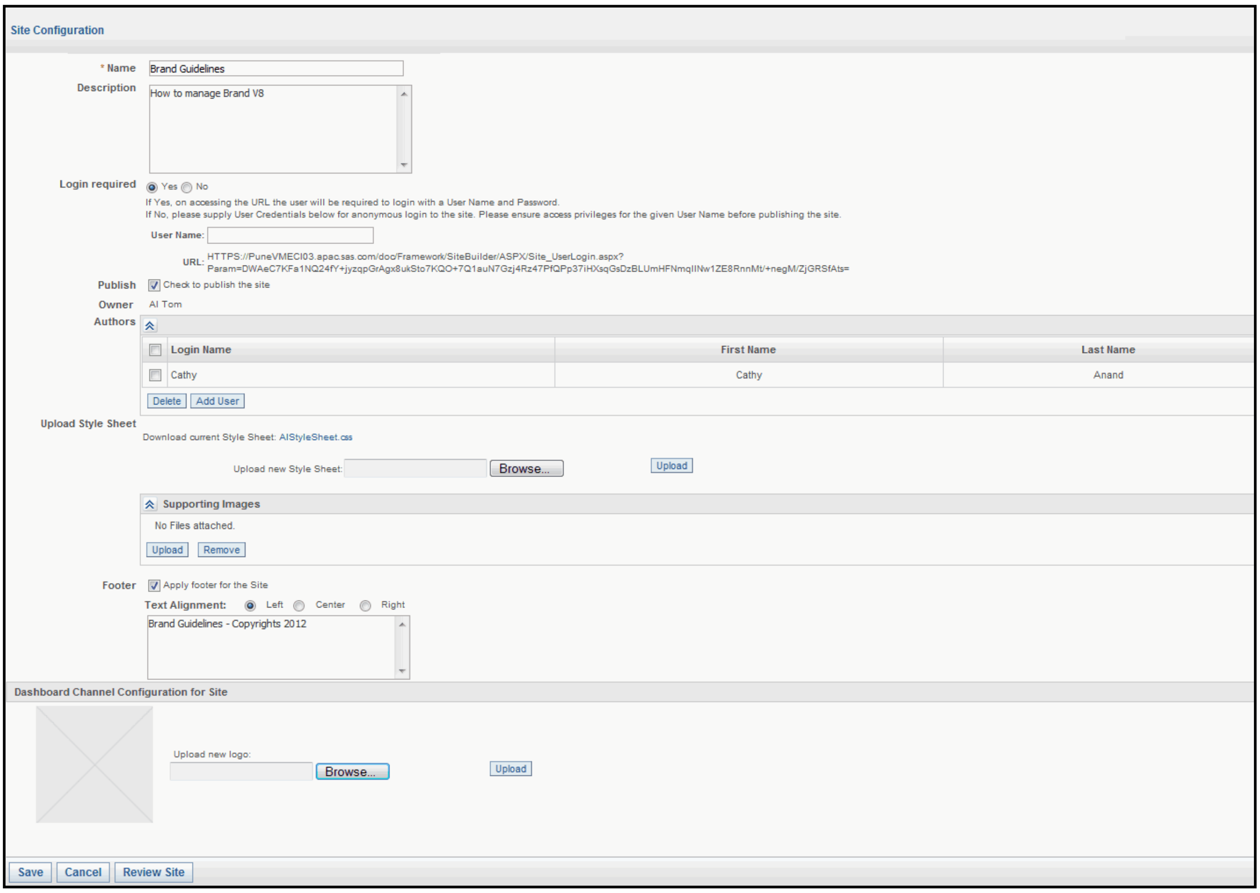


Figure No.3

Editing Sites

On the Site details screen the user can edit the Site details by clicking on the '**Edit**' button **(Figure 5)**. Click on the '**Configure Topbar**' button to configure the top bar for the Site. A popup is displayed where the height for the topbar can be specified. Documents associated with it can be uploaded as images or as HTML **(Figure 4)**.

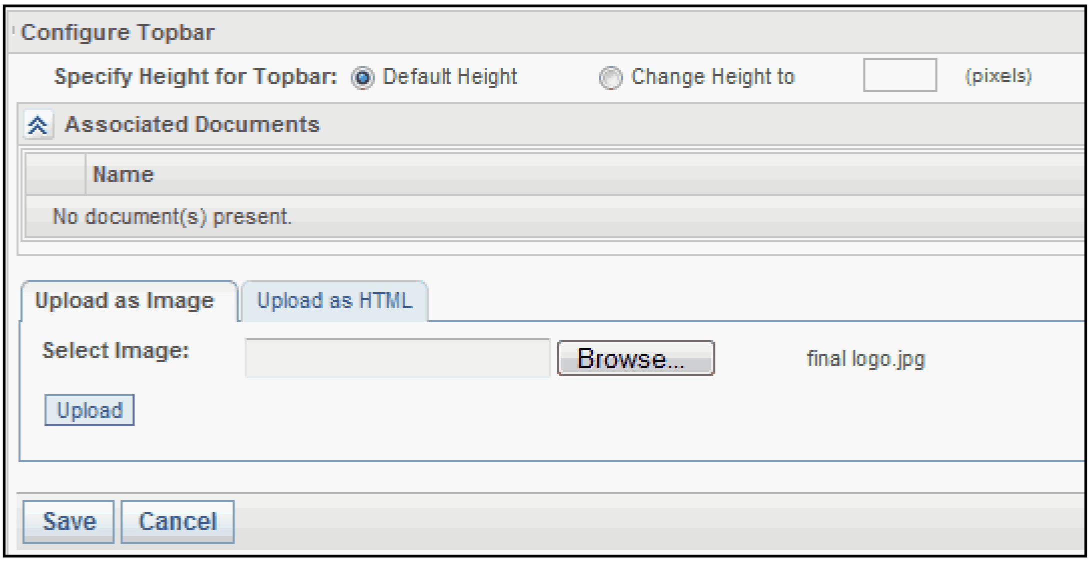


Figure No.4

Managing Pages

The Site details screen lists all the Pages created for the Site, the user can add new Pages by clicking on the '**Create Page**' button or can delete an existing Page by selecting it and clicking on the '**Delete**' button **(Figure 5)**.

Figure No.5

To create new Pages enter the Page name and click on the '**Create Page**' button **(Figure 5)**. The Page list gets updated with the new Page. Click on the Page name link to add contents to the page. Click on the Configure Page button adjoining the Page name to enter the page details as follows **(Figure 6)**:

- **Name** - The name of the Page
- **Description** – The Page description can be entered.
- **Publish** - Select whether to publish the Page.
- **Default** - Select whether to set this Page as default Page or not.
- **Allowed users** – The user can select whether all the users can view this Page or only selected users can view this Page. New users can be added by clicking on the '**Add User**' button or delete the selected users by clicking on the '**X**' button.
- **Denied users**– The user can select the users who are denied access to this Page. By clicking on the '**Add User**' button the user can add more users who are denied access.
- **Allowed groups** – The user can select the groups who have access to this Page. New groups can be added by clicking on the '**Add Group**' button or delete the selected groups by clicking on the '**X**' button.
- **Denied groups**– The user can select the groups who are denied access to this page. By clicking on the '**Add Group**' button the user can add more groups who are denied access.

To save the new Page, click on the '**Save**' button or to cancel, click on the '**Cancel**' button.

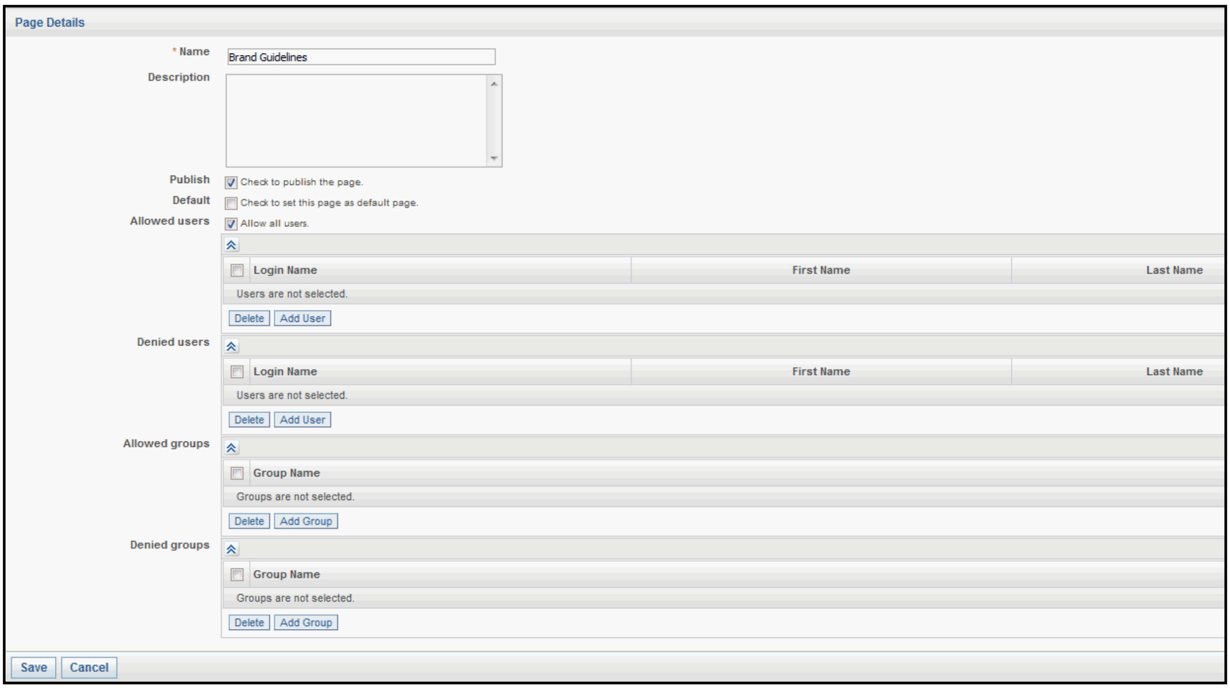


Figure No.6

Configuring Page Layout

Clicking on the Page name link on the Site details screen, a configure Page layout screen is displayed. On this screen the user can specify the Page Hierarchy on the left pane of the Page. The following operations can be performed on this screen **(Figure 7)**:

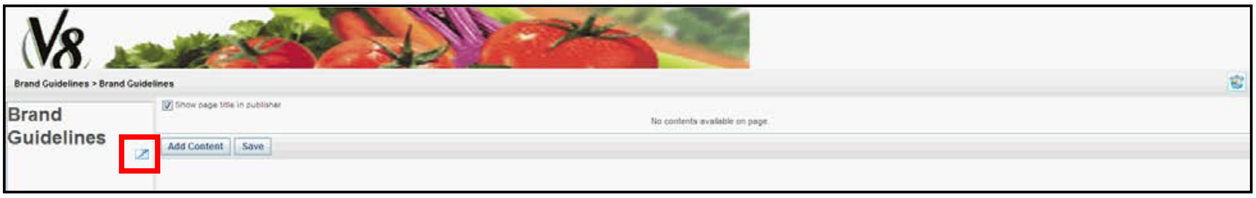


Figure No.7

- **Page Hierarchy** – Click on the button to add the Page hierarchy element. A Page Hierarchy configuration pop-up is displayed **(Figure 8)**. Add the Title, URL, URL for external link, the target and the tooltip.

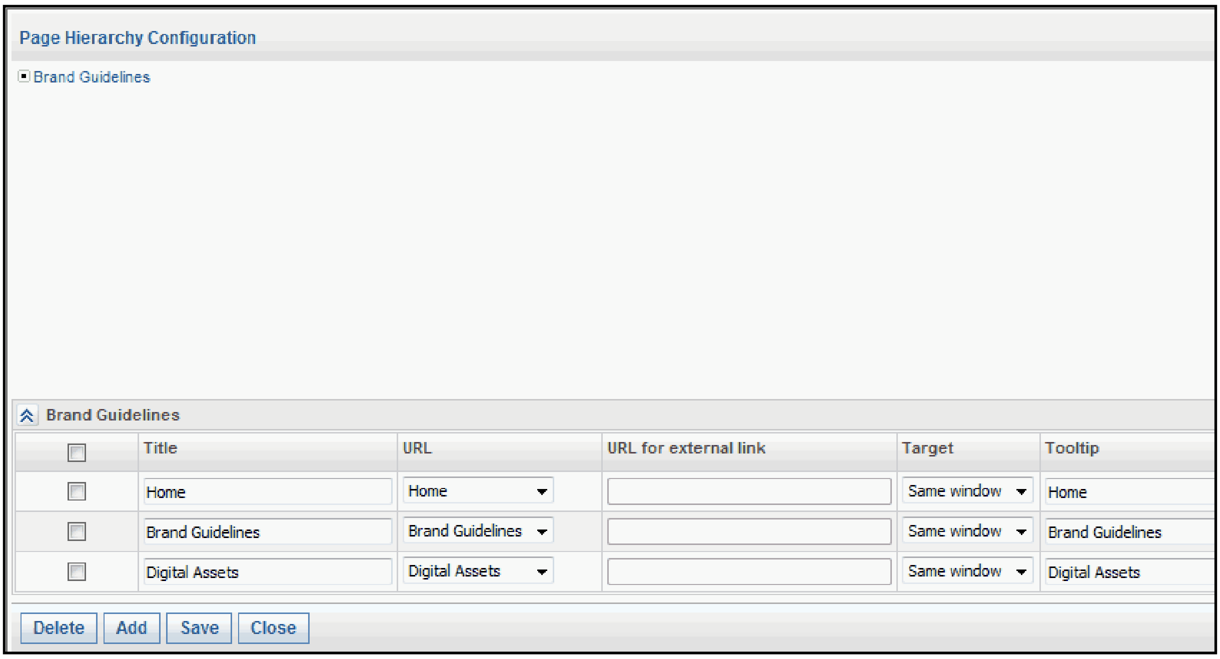
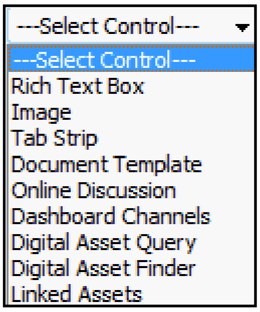


Figure No.8

- **Add Content** – By clicking on this a '**Add Contents'** popup is displayed. The user can add contents to the Page by selecting the type of content (page elements) from the Content Control list box. The types of contents in the Content Control list box are:

	**Rich Text Box** - Allows entering of formatted text. The user can set the fonts, size and other formatting options (See Configuration details).
	Image - Allows uploading images (See Configuration details).
	Tab Strip - Allows configuring tabs within the Pages (See Configuration details).
	Document Template - Allows adding documents such as HTML, PDF etc. (See configuring details).
	Online Discussion – Allows the user to setup a discussion topic on the Page (See Configuration details).
	Dashboard Channels – Allows the user to select and add a pre-configured Dashboard Channel (See Configuration details).
	Digital Asset Query – Allows adding of a digital asset query, which displays assets on the Page fulfilling the query (See Configuration details).
	Digital Asset Finder – Allows user to add a pre-configured "Digital Asset Finder (DAF)" into the page. The DAF will allow end user to search and download assets by forming a query (See Configuration details).
	Linked assets – User can collect assets in the cart in "Digital Library" solution. These assets can be added to the Page from the cart (See Configuration details).

- **- Configure Page –** By clicking on this icon the user can edit the Page details as described in **(Figure 6)**.
- **- View Page** – By clicking on this icon the user can view the Page only if the Page is published.

Adding Contents to the Page (Page Element)

Site Builder provides several controls (Page Elements), which can be embedded on the Page. The user can add these controls by clicking on the '**Add Content**' button on the Page. A drop down list box is displayed, select the controls to be added. Enter the title for the content and click on the '**Add**' button **(Figure 9)**. Each newly added control forms a section on the Page. These sections can be ordered by drag and drop feature. Each section has a configure and a delete button to configure the controls and delete it respectively. Following is the brief description for configuring each of these controls.

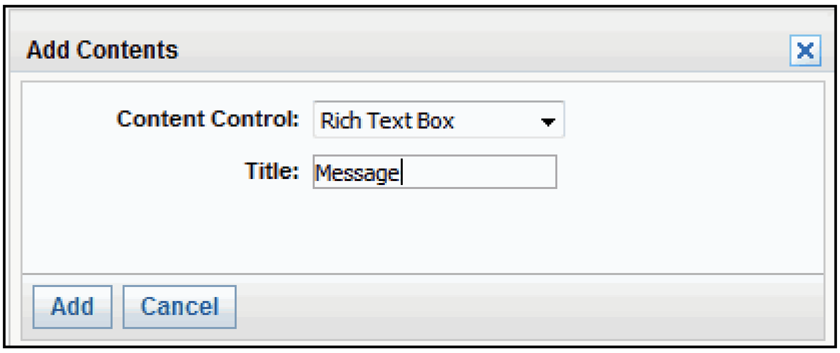


Figure No.9

Rich Text Box

Text can be entered for the Page. It has several facilities for formatting the text like bold, italics, changing the font etc. Besides that there are lot of other advanced features like bulleting and numbering text, paragraph indentation etc.

To configure a Rich Text Box add the control to the Page and click on the button. This will display a window where the user can enter the text. Once done, click on the '**Save**' button **(Figure 10).**

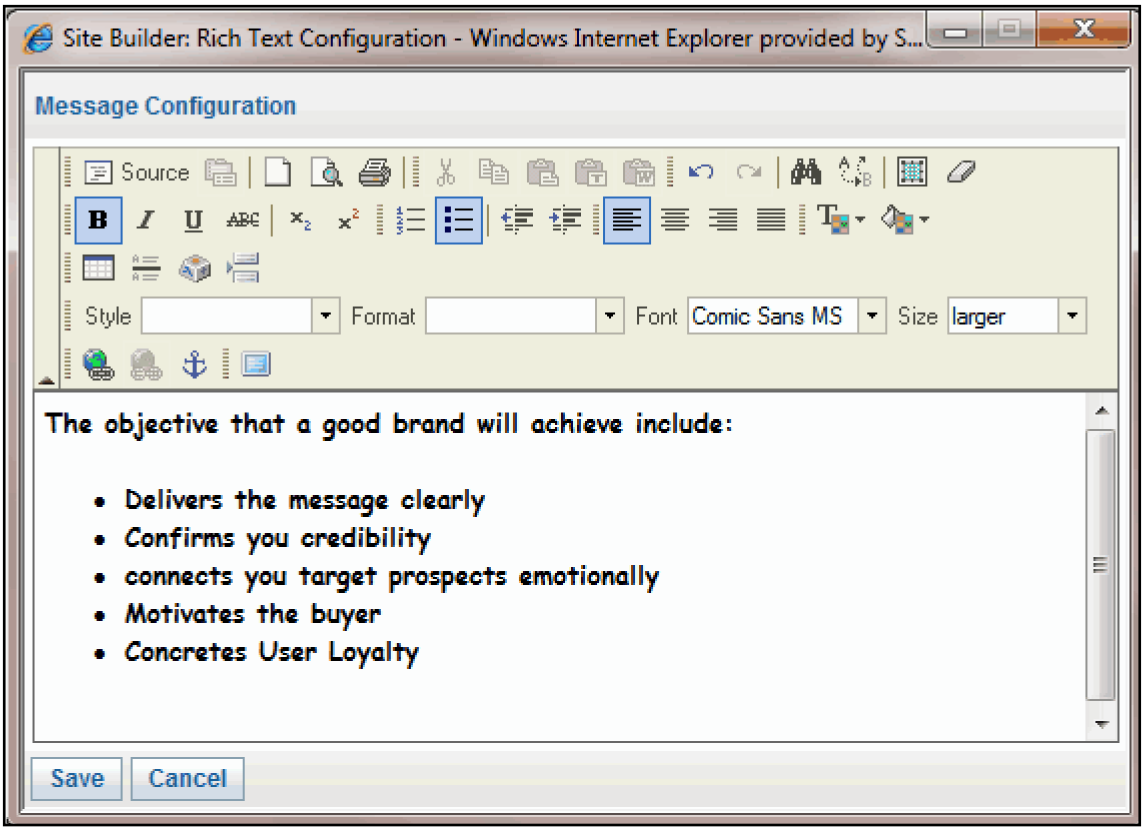


Figure No.10

Image

This allows the user to add an image to the Page. To configure the image add the control to the Page and click on the configure button. This will display a window where the user can upload the image by browsing the file system and selecting the image. Alignment for the image can be done and a border can be applied. By clicking on

‘**Add Link**’ link the user can associate a web link to the image which can be a link to an external website or a page on the site. Once done, click on the ‘**Save**’ button **(Figure 11)**.

Figure No.11

Tab Strip

By default there is one tab strip for the Site, which can be shared across the Pages. Any configuration changes done to the default tab strip reflects on each and every Page where it is used. If user wants a tab strip per Page can be created which is specifically for the Page and cannot be shared across Pages. To configure a Tab strip add the control to the Page and click on the configure button. This will show up a tab strip configuration window where the user can specify number of tabs for the tab strip. To add a tab on the tab strip click on the ‘**Add**’ button, which will allow the user to specify details for each tab, which are as follows:

- **Title** - Provide title for the tab.
- **Selected** – Select whether true if the tab needs to be shown as highlighted/current selected tab.
- **Url Type** – On each tab user can set a Url when clicked will invoke a Page within the Site or an external Site.
- **Target** – The user can specify if the tab Url to be invoked in the same Page or a new Page.
- **Enabled** – Allows the user to enable or disable a tab on the tab strip.
- **URL** – The link for the tab, which can either have an external link or a link to a page on the Site. To select a Page within a Site click on ‘**Select Pages’.**
- **Tool Tip** – Allows the user to provide a tool tip for the tab.

The user can delete the selected tabs by clicking on the ‘**Delete**’ button. To save the tab configuration click on the ‘**Save**’ button **(Figure 12)**.

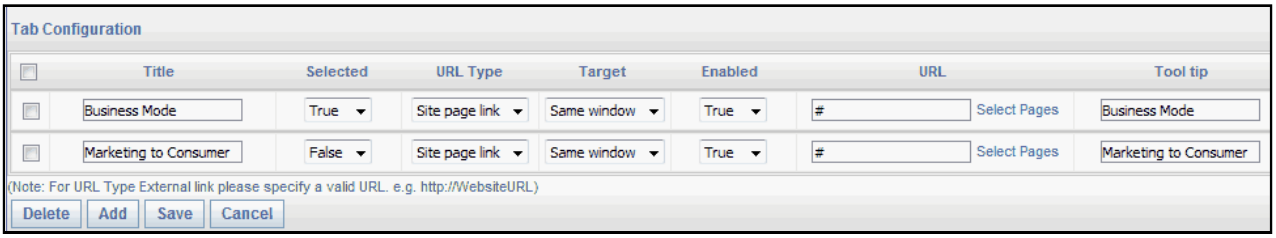


Figure No.12

Document Template

This allows the user to upload documents and embed them on the Page. After adding the control to the Page click on the configure button which displays a window to upload the documents which gives the user two options **(Figure 13)**:

- **Uploading existing Document** - The existing uploaded documents can be used. Here the user can upload a HTML, image or any other document.
- **Upload New Document** – The user can browse and upload a main document and/or a support document. If the document is HTML the user can also upload images, which are referenced by the document.

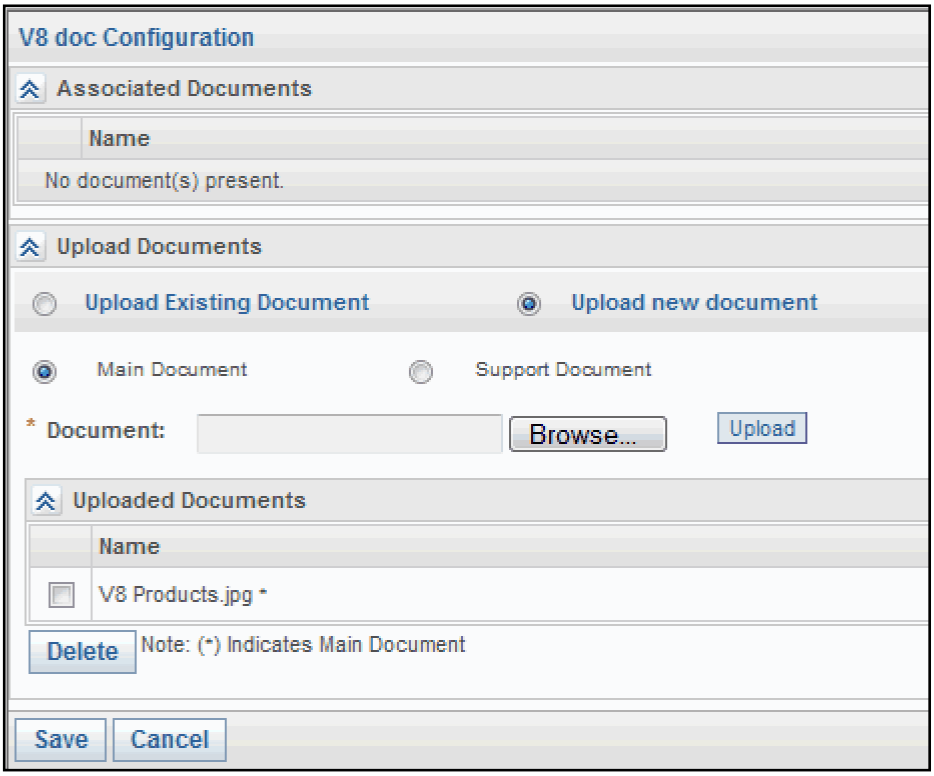


Figure No.13

To save the Document Template Configuration click on the '**Save**' button **(Figure 13)**.

Online Discussion

The user can add a discussion topic on the Page. When the end-user visits the Site and traverses to the Page the user can post comments against the Topic. To configure an online discussion Topic add the control to the Page and click on the configure button, it opens up a window where the following details of the Topic can be entered:

- **Title** – The title for the discussion.
- **Description** – The description of the Topic for discussion.
- **Start On** – The start date of the Topic.
- **Valid Upto** – The Topic validity date.
- **Status** – The user can select whether the Topic is active or inactive.
- **# Comments per page** - Here the user can enter the number of comments to be shown on the Page.

- **Reply Button Text** – Here the user can enter the label of the button, which the user will click to post comments.

To save the discussion, click on the ‘**Save**’ button **(Figure 14)**.

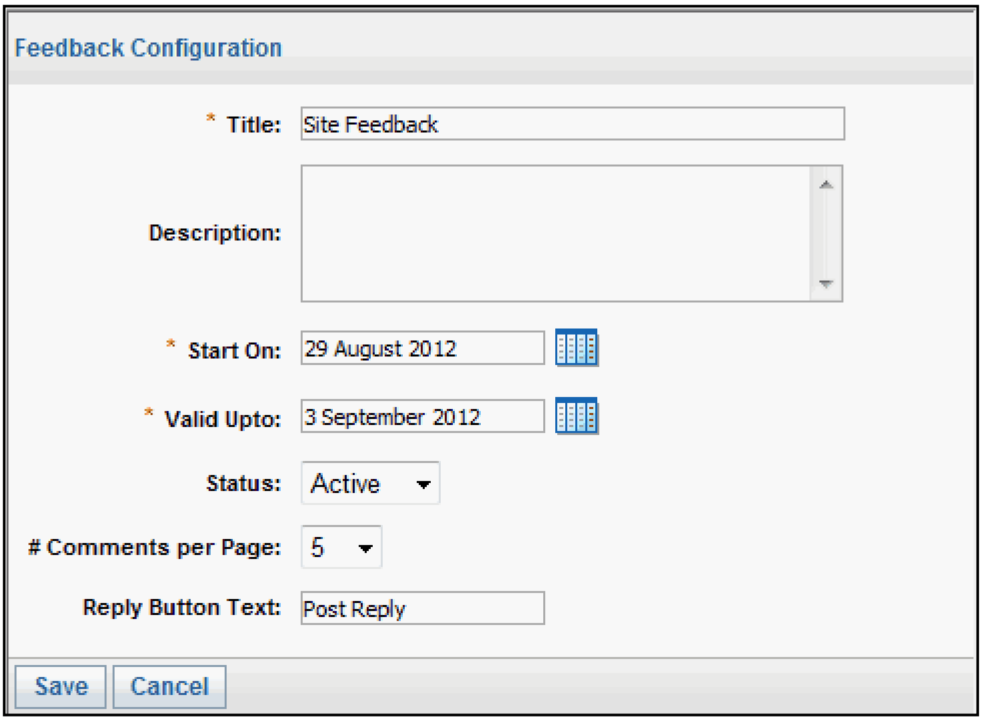
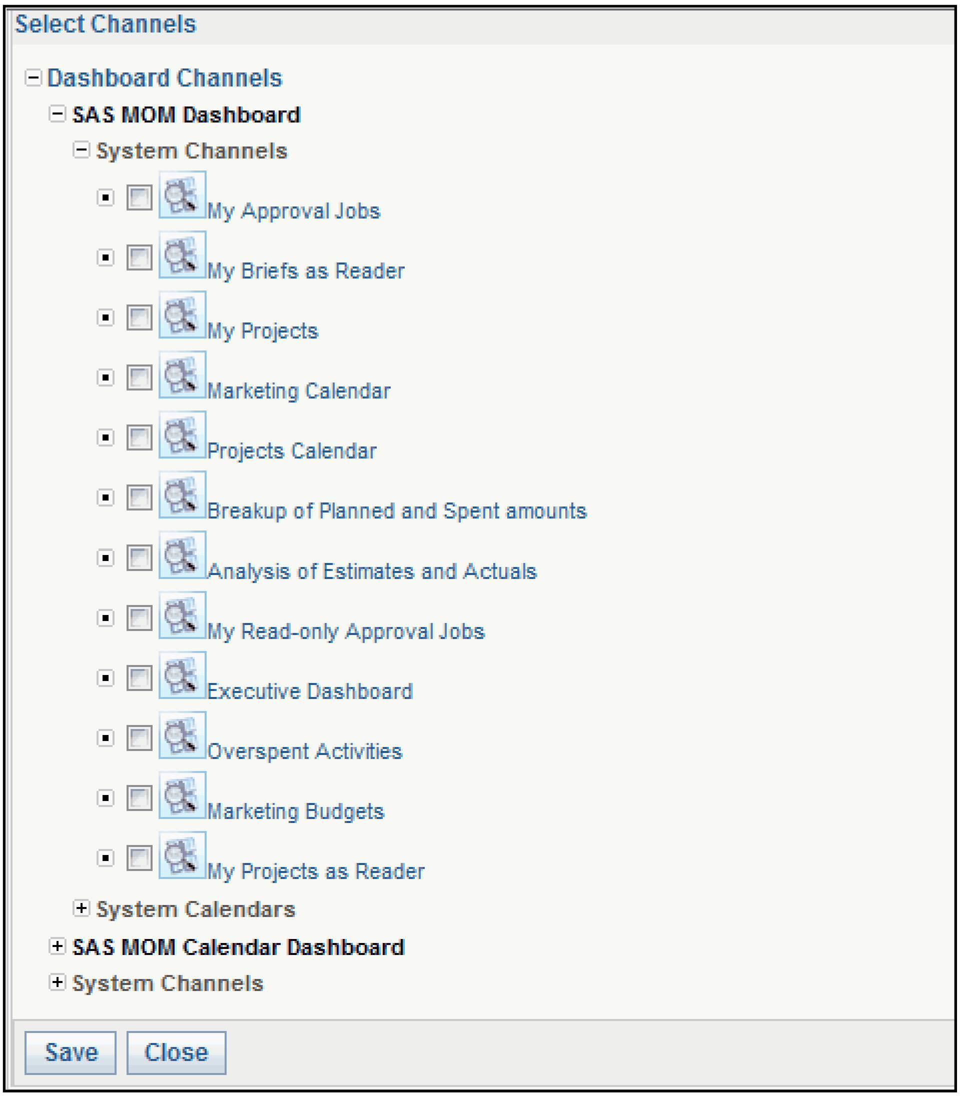


Figure No.14

Dashboard Channels

The user can add Dashboard Channels on the Page. After adding the Channel control on the Page click on the configure  button a Channel selection screen is shown. On this screen all the configured Channels in the system are displayed. The user can select any of the configured Channels to be displayed on the Page and click on the ‘**Save**’ button **(Figure 15)**.



Digital Asset Query

The user can add a Digital Asset Query, which displays assets on the Page fulfilling the query. Add the control on the Page and click on the configure button, Digital Query Definition is displayed with section for query definition by selecting filters, specify information to be displayed for the assets by selecting attributes/fields, layout of the assets either grid or list view on the Page and what action to be performed for each assets. Once done, click on ‘**Save**’ button **(Figure 16)**.

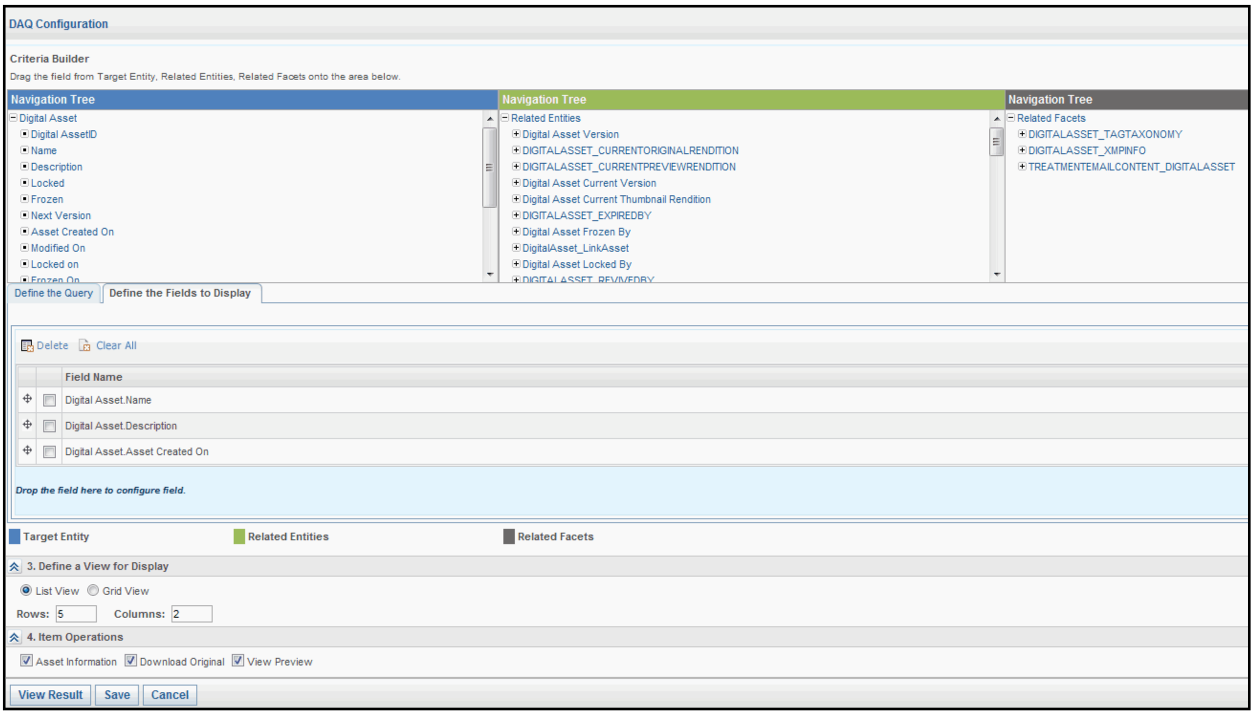


Figure No.15

Digital Asset Finder

The user can add a pre-configured 'Digital Asset Finder (DAF)' component on a Site Page. DAF allows end user to form a search query to search for Digital Assets, which can then be downloaded by the end users from the Site Page. Add the control on the Page and click on the configure button a DAF selection screen is shown where the user can either select a DAF from a selection of pre-configured DAF or create a new DAF by clicking on '**Configure DAF**' button. Once done, click on '**Save**' button **(Figure 17)**.

Figure No.16

Linked Assets

The user can add assets from Digital Library on the Site Page, to add the users have collect assets from Digital Library into the cart. Add the control on the Page and click on the configure button an assets selection screen appears. The user can paste assets from the cart into this screen by clicking on the '**Paste from cart**' button. This displays all the assets from the cart and allows user to select the one to show on the Page. Once done, click on the '**Save**' button **(Figure 18)**.

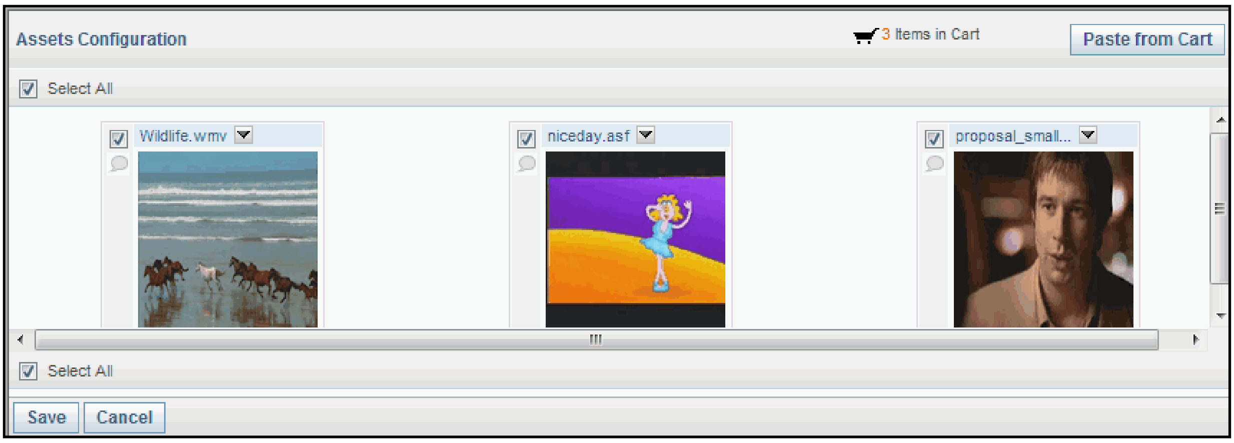


Figure No.17

Task Pane

The user can configure the left pane of the Page by adding a task pane to the left of the Site Page. The Task Pane can be configured to show list of commands/links, which when clicked can traverse to a Page within the Site. To add a left pane click on the '**Add Leftbar Contents**' button which displays a window where the user can add a task pane or a Page hierarchy. The task pane appears on the Page, the user can configure, select an existing task pane or delete the newly added task pane. To select an existing task pane click on button which displays the task pane selection screen, it display all task panes configured in the current Site. The user can select the task pane and click on the '**Ok**' button. To configure a new task pane click on the configure button. This displays a task pane configuration screen where user can specify number of links to be shown on the task pane and provide details for each link. To save click on the '**Save**' button or '**Reset**' to reset to original setting **(Figure 18)**. Links can be added by clicking on the '**Add Link**' button.

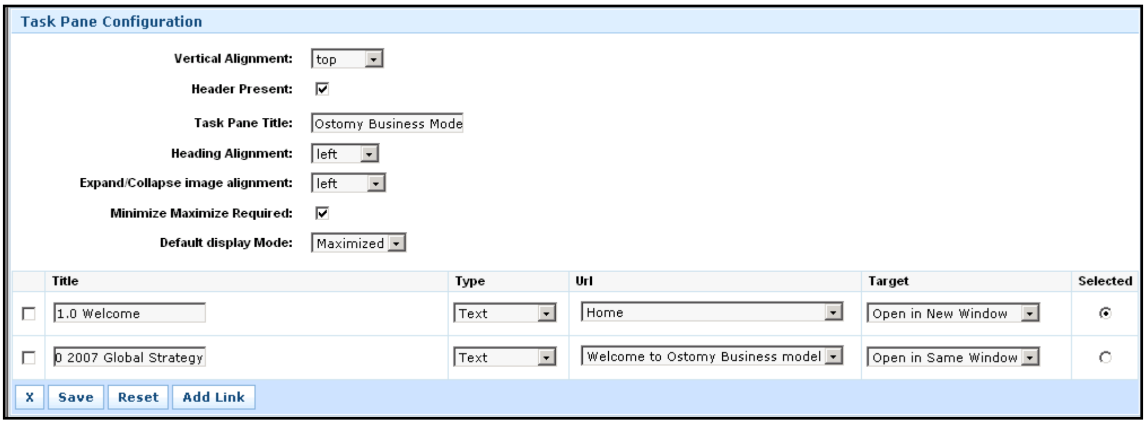


Figure No.18

Reviewing a Site

During site creation if the users want to get the Site reviewed by different individuals, a discussion forum can be set up and the users can be invited to provide feedback and comments. To accomplish this click on '**Edit**' link for the Site on the Site list. This displays Site details screen with list of Site Pages. Click on the '**Edit**' button on the Site detail section of the screen to edit the Site details. On Site edit screen click on **'Review Site**' button to setup a discussion topic for the site. Here the Current Review and the Old reviews are displayed. The user can create a review by clicking on the '**Create Review**' button. A Site Review screen is displayed which allows the user to enter details such as:

- **Title –** The title for the Topic.
- **Description** – Additional information about the Topic can be given.
- **Start Date** – The day on which the Topic is initiated.
- **Valid Until** –The date until which the Topic is valid.
- **Attachments** –Where relevant documents can be uploaded.
- **Invitees** – The user can choose invitees for a Topic by adding a group or a user.

Click on the '**Save**' button to save the review and send an email notification to all invitees **(Figure 19)**.

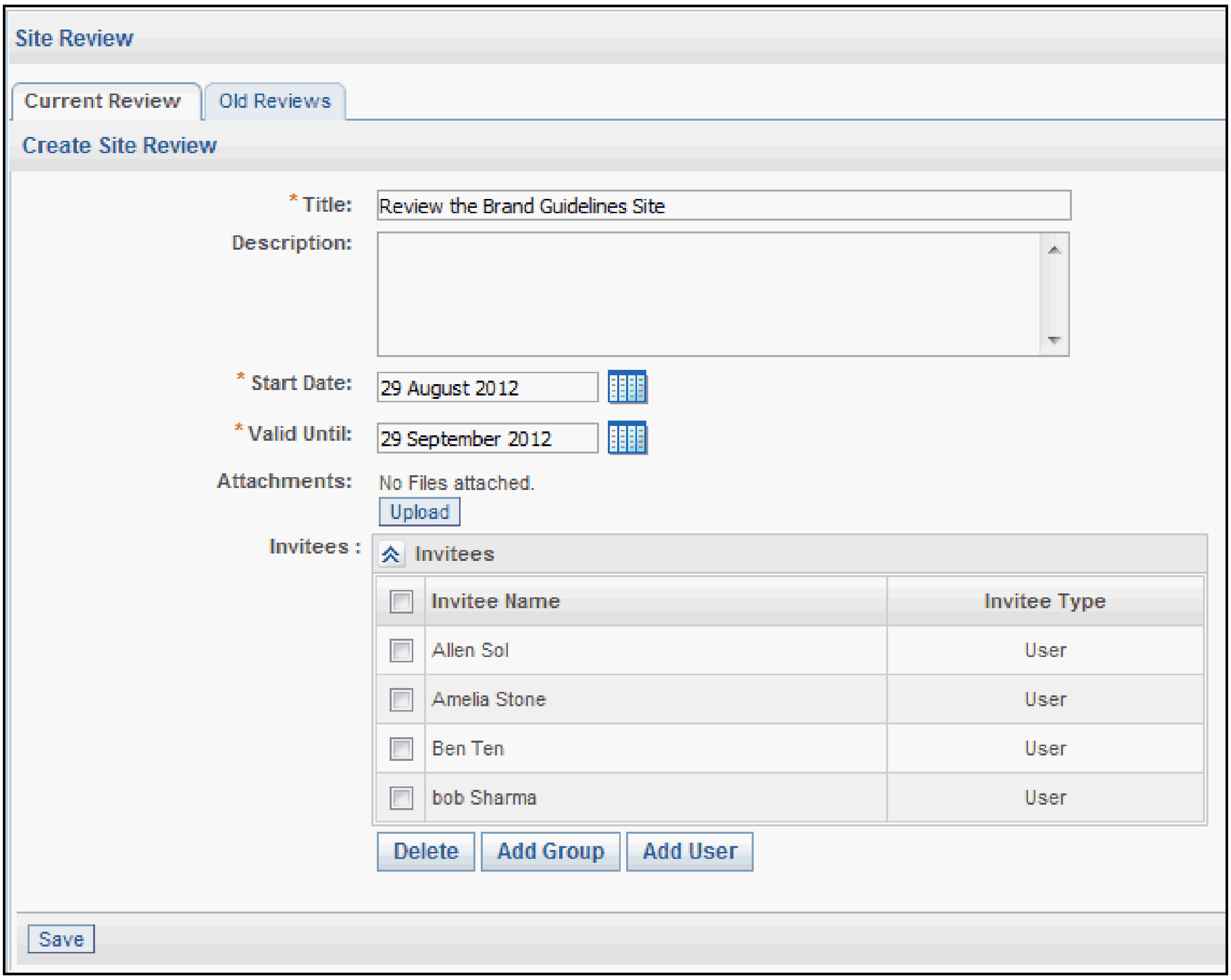


Figure No.19

The user can provide their comments on the Site either by clicking on the link in the email **(Figure 22)** or by launching Site Builder solution, and selecting '**Review Sites**' on the left pane of the solution to bring up list of Sites to be reviewed.

Site Builder Reports

Site Builder reports displays a list of configured reports. To launch the reports click on '**Reports**' on the dashboard screen under MOM. The strategic planner are displayed by default. Click on the 'Site Builder' link on the left pane to view all the reports related to site builder.

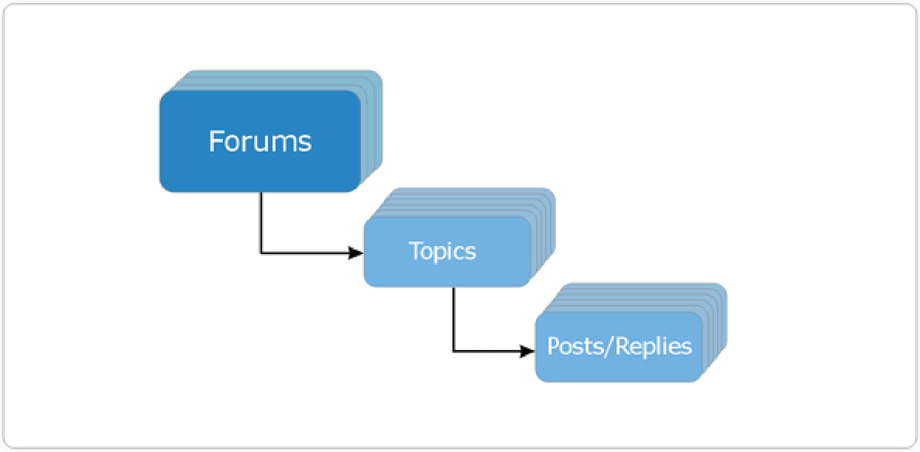
To see the list of Site Builder reports select '**Site Builder**' from the report category. The following Site builder reports are displayed:

1. Site Asset Download
2. Site Access Summary

Once the reports are generated user can export the reports in Word, PDF or Excel.

Knowledge Manager

Overview



SAS MOM's Marketing Knowledge Manager allows the user to create discussion forums and topics. The user can browse and navigate through these forums, topics and post their comments. Along with their post they can upload relevant documents. Besides navigation, it also provides a very powerful search mechanism to search for forum, topic and post based on a keyword. It serves as a growing knowledge base and provides an efficient mechanism to resolve questions. It is a knowledge repository, which comprises of a range of practices used by organizations to identify, create, represent and distribute knowledge for reuse, awareness and learning across the organization.

Glossary of terms used

Forum - A Forum is where people can exchange opinions and ideas related to a particular topic. A Forum is the container for topics of discussion. Permitted Users/Groups can be specified for a Forum. If no permitted user/group is present then all system users will have access to this forum. A Forum moderator also needs to be specified for a Forum.

Topic - Each topic indicates a distinct topic for discussion. Permitted Users/Groups can be specified for topic. This has to be subset of permitted Users/Groups specified for forum.

Post/Replies - There are invitees for each Topic in a Forum who may place their Posts or Replies against a topic. Each Topic can have multiple posts. Posts can contain rich text (e.g. HTML) or plain text. Attachments can also be specified with each post.

User Roles

- **Forum Administrator**: The Forum Administrator has the ability to create a forum as well as edit, delete or modify any forum. The Administrator can also open or close the forum and select the moderator.
- **Forum Moderator**: The Forum moderator will moderate the topics under the forum. The Moderator may edit, delete or modify any topic in the forum. The Moderator also has the privilege to open or close a topic.

- **Topic Owner**: The owner of a particular topic can edit topic details and invite users to participate in the discussion. The owner has the privilege to delete the posts, open and close as well as reopen the topic.
- **Permitted Group Users**: These can browse and navigate forums and topics. They can also view topic details, read posts for a topic as well as download documents attached to a post. They can post their comments on a topic and edit and delete their own posts.
- **Invitees Group/Users**: These can browse and navigate forums and topics. They can also view topic details, read posts for a topic as well as download documents attached to a post. They can post their comments on a topic and edit and delete their own posts.

Getting Started

After signing in, click on the '**Knowledge Manager'** link provided on the Dashboard screen on the left menu to launch the solution **(Figure 1).**

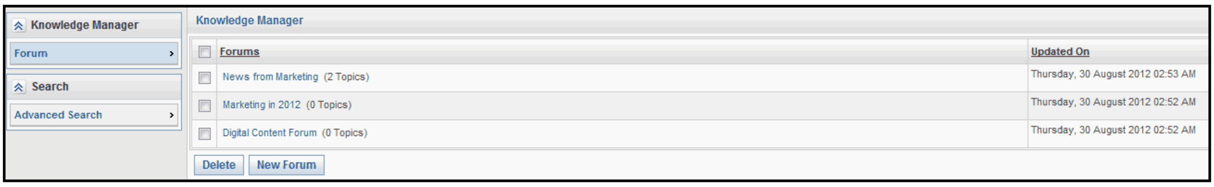


Figure No.1

Left Navigation Bar - It has links related to the Marketing Knowledge Manager. The links are:

Forum - The list of forums accessible to the user are displayed here.

Search - A search application is launched where user can search for a keyword in forum, topics and posts.

Content Frame - It displays a list of forums created by the administrator.

Discussion Forum

The lists of forums, which have been configured in the Marketing Knowledge Manager, are displayed **(Figure 2)**. An Administrator can view all the forums. The Moderators can view only those forums to which they have access rights.

Forum Creation

After launching the Knowledge Manager, lists of forums are displayed. The list gives details such as **(Figure 2)**:

- **Forum name** – The Forum title is displayed.
- **Number of Topics** – The number of topics under the forum.
- **Description** – Description of the forum.
- **Updated On** – the day, date and time when the forum was last updated is displayed.

To create a new forum click on the '**New Forum**' button.

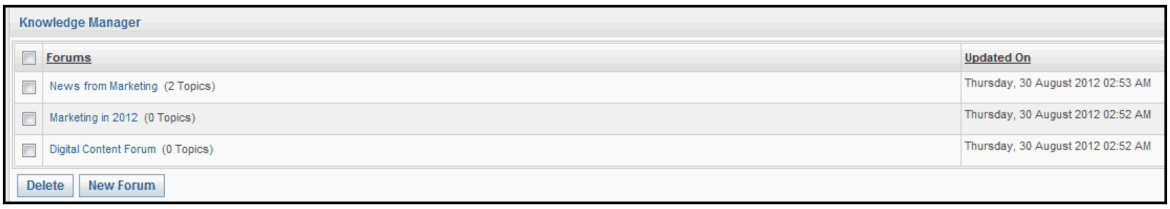


Figure No.2

A forum details screen **(Figure 3)** is displayed, which allows the user to enter details such as:

- **Title** – The Forum title.
- **Description** – The description for the forum.
- **Moderator** – Enter the first letter and a drop down list is displayed. Select the moderator for the Forum.
- **Permitted Groups** – Selected groups who can view the forum can be added by clicking on the '**Add Group**' button.

To list the New Forum in the forum list, click on the '**Save**' button.

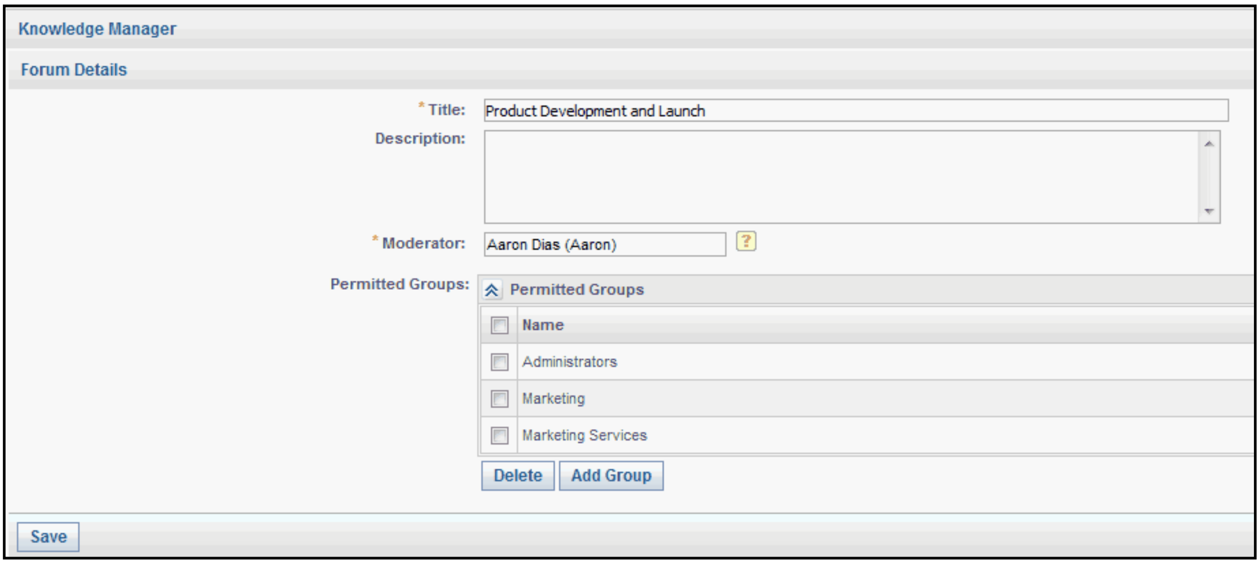


Figure No.3

Creating a Topic

On the Forum details screen each Forum on the list has a link to a page, which displays the forum details and list of topics under it **(Figure 4)**.

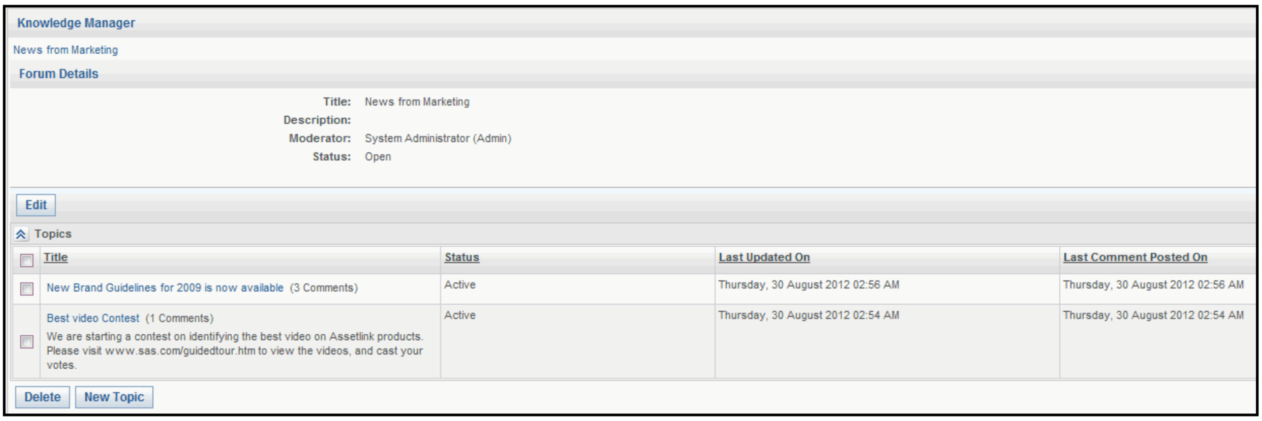


Figure No.4

This screen has the following sections:

- **Forum Details** - This displays forum details such as the title, description, moderator and the status (open or closed). The user can edit these details by clicking on the '**Edit**' button.
- **Topics** – This displays the list of topics under the Forum with the following details:
  - **Name** - Title of the topic.
  - **Description** – Description of the topic.
  - **Number of Posts** – The number of posts under the topic is displayed.
  - **Updated On** – The day, date and time when the topic was last updated is displayed.
- **Delete** – Deletes the selected topics.
- **New Topic** - Displays a New Topic screen, which allows the user to enter details such as:
  - **Title –** The title for the topic.
  - **Description** – Additional information about the topic can be given.
  - **Start Date** – The day on which the topic is initiated.
  - **Valid Until** – The date until which the topic is valid.
  - **Remind me on Topic Closure** – Select Yes or No.
  - **Remind me before(Days)** – The number of days before the topic ends the initiator should be notified.
  - **Closure Details** – Select whether the topic should close on the due date, whether the initiator should be notified on closure and should be reopened and whether the initiator should be notified when any invitee posts a comment.
  - **Attachments** – Relevant documents can be uploaded.
  - **Invitees** – The user can choose invitees for a topic by adding a group or a user.

To list the new topic in the Topic list of the relevant Forum, click on the '**Save**' button **(Figure 5)**.

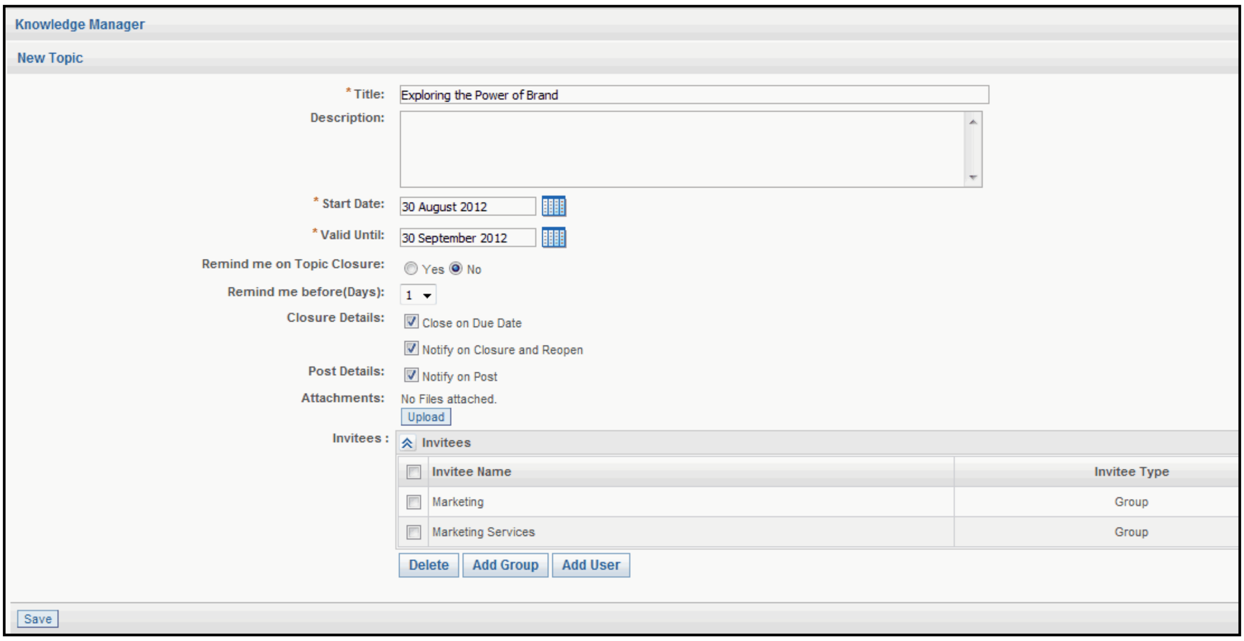


Figure No.5

Posting Comments

All the invited users get an e-mail notification with a link to the topic. The user can click on the link and navigate to that topic. When the user clicks on the topic name it displays the **Topic Details (Figure 6)** screen. It has two parts.

- **Topic Details** - Details such as title, description, start date, valid until, attachments if any are displayed and the status (open or closed) of the topic is displayed. The topic owner can edit these details by clicking on the '**Edit**' button.
- **Posts** - The replied posts for the topic are displayed. The post list shows the responder's name, the date and the time of post and the post details. Besides that, the list of attachments if any is displayed along with the post.

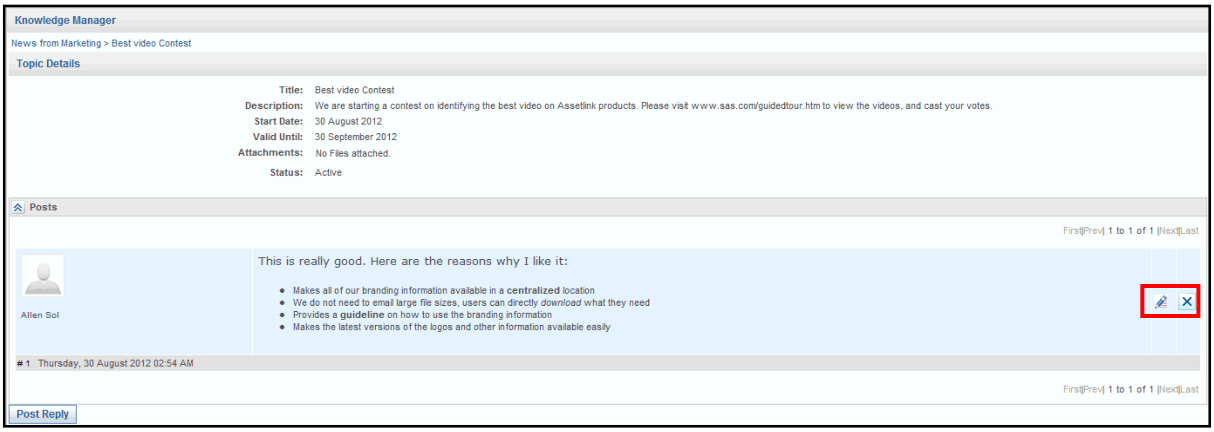
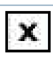


Figure No.6

	**Edit** – The post owner can edit the post.		**Delete** – Delete the post.

To post comments click on the ‘**Post Reply**’ button **(Figure 6)** on the **Topic Detail** screen. This launches a post reply screen, which has two sections: **(Figure 7)**

- **Post Message** - This section displays a text box, where the user can type comments. The text box has rich text editing facilities.
- **Attachments** - The user can upload a list of documents.

Once the user has entered the comments and has uploaded the attachment, the user clicks on the ‘**Post Reply**’ button. The user is taken back to the **Post List** screen where the newly added post is displayed.

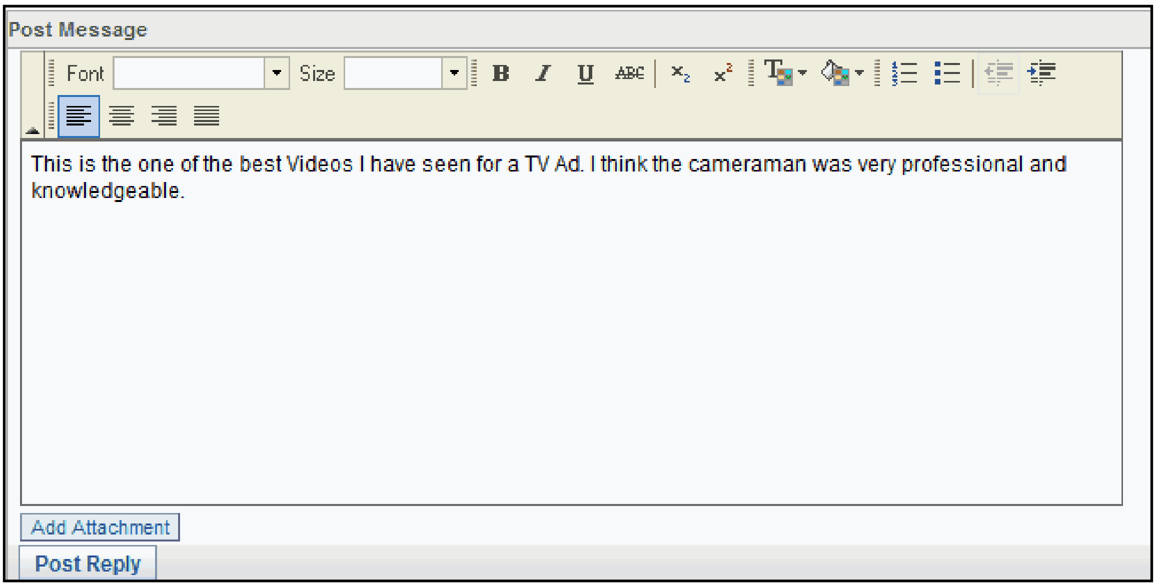


Figure No.7

Closing and Reopening a Forum

On the Forum details screen **(Figure 4)** click on the ‘**Edit**’ button. **Figure 8** is displayed. By clicking on the ‘**Mark as Close**’ button the forum can be marked as closed. The reason for closure needs to be given and then click on the ‘**Close**’ button.

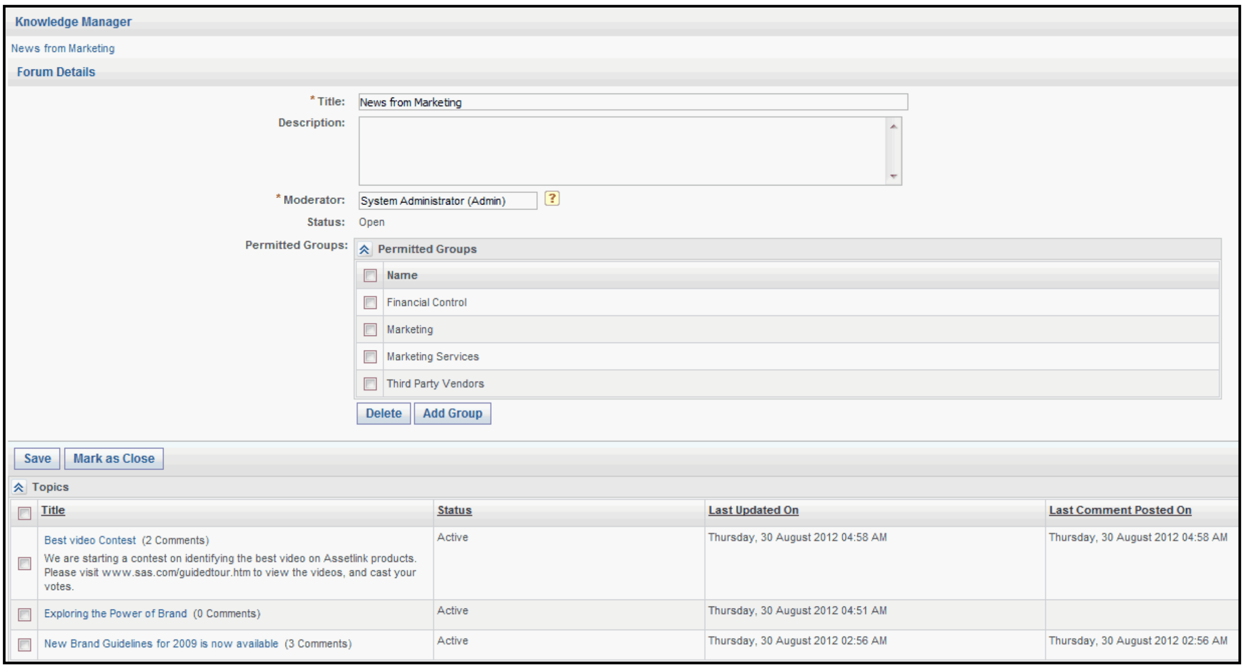


Figure No.8

For reopening forums click on the '**Edit**' button on the Forum details screen **(Figure 4)** and click on the '**Reopen**' button.

Search for Forum, Topic or Post

After launching the Knowledge Manager click on the '**Advanced Search**' hyperlink on the left navigation bar. It displays a screen where a user can search for a particular topic or a post by entering the dates on which they were created and by providing a keyword in the '**Contains**' edit box **(Figure 9)**.

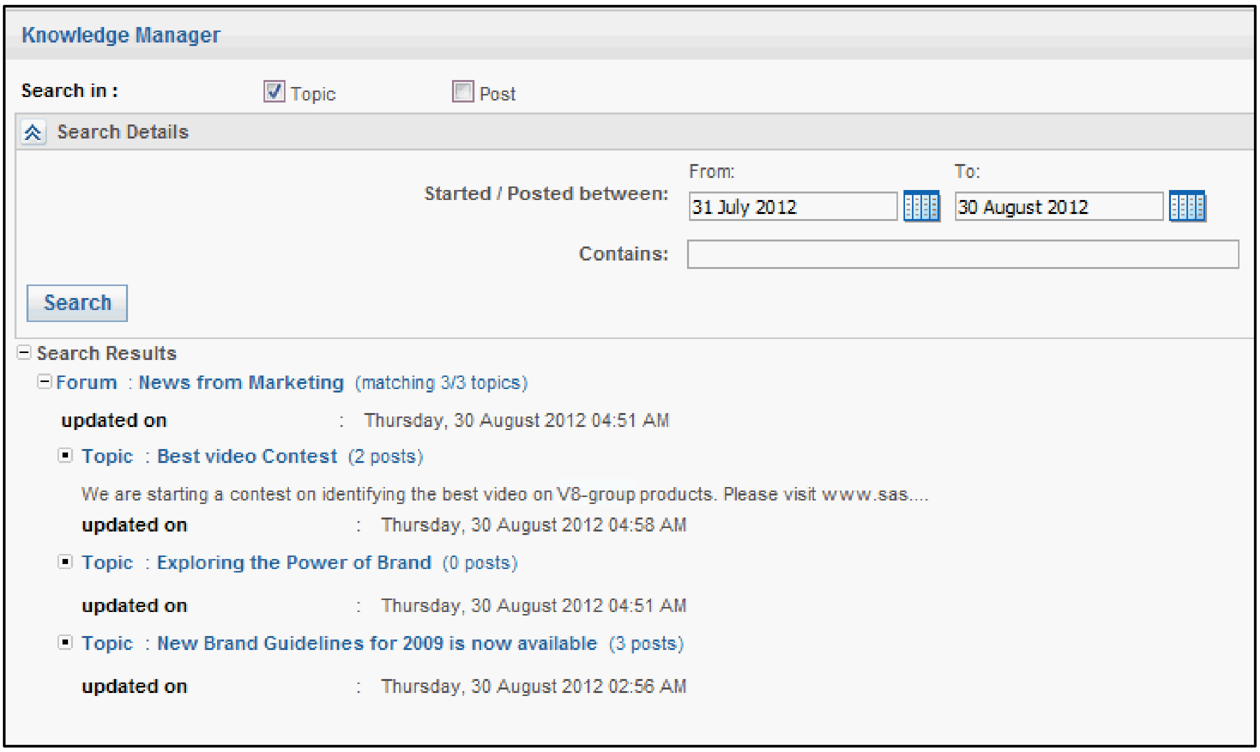
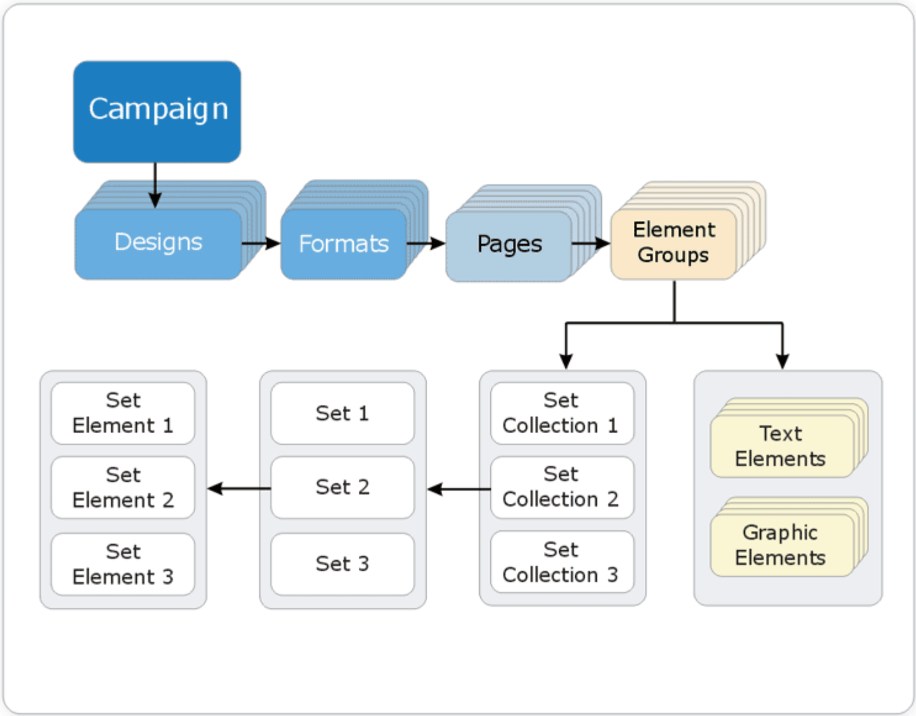

Knowledge Manager
Search in :
Topic
Post
Search Details
Started / Posted between:
From:
31 July 2012
To:
30 August 2012
Contains:
Search
Search Results
Forum : News from Marketing (matching 3/3 topics)
updated on : Thursday, 30 August 2012 04:51 AM
Topic : Best video Contest (2 posts)
We are starting a contest on identifying the best video on V8-group products. Please visit www.sas....
updated on : Thursday, 30 August 2012 04:58 AM
Topic : Exploring the Power of Brand (0 posts)
updated on : Thursday, 30 August 2012 04:51 AM
Topic : New Brand Guidelines for 2009 is now available (3 posts)
updated on : Thursday, 30 August 2012 02:56 AM

Figure No.9

Artwork Producer

Overview



Artwork Producer automates generation of artwork mechanicals for product packaging as well as marketing collateral by using database driven design templates.

It is a tool specially designed to empower marketing organizations to simplify the production, distribution and customization of artwork. This ensures enterprise wide consistency of corporate and brand identity use.

The Artwork Producer empowers brand and marketing managers to configure artwork templates that reflect the use of brand elements and designate areas where local teams can place customized graphics and text.

Marketing Service teams and external design agencies will define business rules, build design templates and upload it in Artwork Producer to automate the production of artwork.

Branch offices, other corporate users and print production houses will use Artwork Producer to produce customized artwork without needing any design tools.

Glossary of terms

- **Artwork** - Artwork includes text, graphic and illustrations arranged individually or in any combination for subsequent printing or for use in or on products or for layout in an advertisement.
- **Templates -** Templates are pre-existing forms that include standard text and spaces to fill-in-the-blanks with standard information. Various users may then use the templates in the system and customize them according their needs. The designers convert the existing artwork into templates by adding tags and linking images using software such as Illustrator, InDesign etc.
- **Campaign** - A campaign is a connected series of activities designed to bring about a particular result. For example: A campaign could be a coordinated program of advertising and promotion. It could involve the

creation and coordination of a series of advertisements (both broadcast and print) around a particular theme to promote a product. All artwork related to a campaign should be clubbed together in the system. For example: In a financial services organization, there could be campaigns such as financial planning or retirement planning.

- **Designs -** Designs are a further classification of artwork related to a campaign. For example: An artwork for an advertising campaign related to promoting financial planning could have different designs for newspaper and magazine ads. Therefore an artwork for a campaign can have multiple designs.
- **Formats -** Formats are a further classification of artwork related to a design. Therefore an artwork design can have multiple formats distinguished based on certain attributes such as size or color etc.
- **Elements -** Elements are the essential parts of an artwork format that uniquely identify it. It could include the text and/or graphics contained in the artwork. An artwork format could have several elements.
- **Element Groups -** Element Groups are the clubbing of elements in an artwork into a common group. An artwork format could have several elements classified into several element groups.
- **Sets -** Sets consist of specific combinations of elements in an element group. Sets form a part of the set collections of an element group.
- **Set Elements –** Set elements can be either text or graphic entity.
- **Set Collection -** Set Collection is a grouping of sets. An element group could have several set collections**.**
- **Artwork Page -** The artwork that is ready for print production can be organized into pages. A page may contain associated text, graphics files etc. A page can therefore contain several element groups.

Roles in Artwork Producer

The following are the roles involved in Artwork Producer:

- **Administrators/Back Office personnel -** Administrators are the users who will store standard templates in the system in the specified hierarchy for use by the Branch offices.
- **Artwork Creators -** Artwork creators are the branch offices, other corporate users and print production houses that will use artwork producer to produce customized artwork without needing any design tools. They will generate the artwork from the standard templates available in the system.

Prerequisites

A vault is required to store the artwork producer content i.e. template and generated artwork. By default the name of the artwork producer vault is set to '**ArtworkProducer**', which along with other artwork producer related configuration could be changed using the setting application.
The administrator should create the vault required by artwork producer using the digital library application. The vault has to be a non-system vault and the name should be the same as specified in the artwork producer settings. 'Everyone' should have complete access to this vault.

Getting Started

After signing in, click on the '**Artwork Producer**' link provided on the dashboard screen on the left pane (MOM). The application is launched **(Figure 1)**.

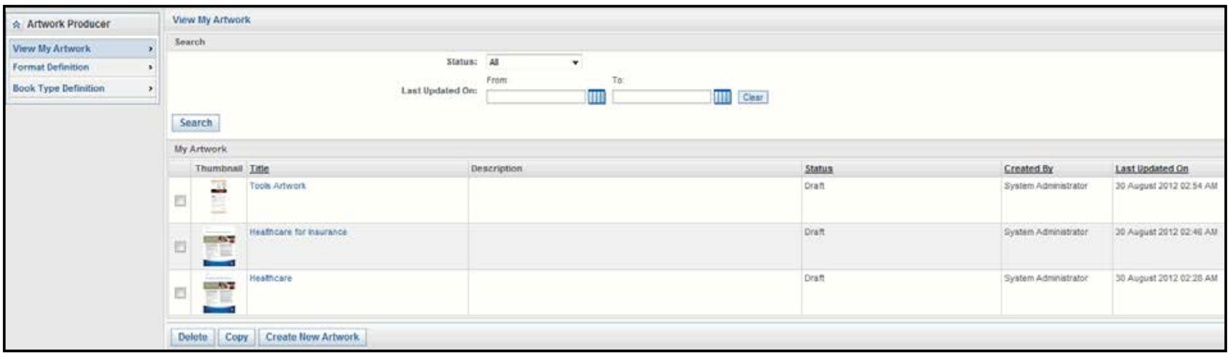


Figure No.1

Left Pane: The left pane is divided into sections providing users with functionality related to artwork producer. The sections are:

Artwork Producer – Has the following links:

- **Artwork Generation** – The user can create new artwork.
- **Format Definition** – The user can create new campaigns.
- **Book Type Definition** – The user can create new book types.

Content Frame: By default it displays the screen for view my artwork where the user can view and search for my artwork. The user can also create new artworks.

Artwork Generation

A view my artwork screen **(Figure 1)** is displayed with a search facility. The user can search for a specific Artwork by selecting the search criteria such as the status and last updated on (From and to dates) and then clicking on the '**Search**' button **(Figure 1)**. The result will be displayed in the my artwork section.

Each row in the my artwork list shows details such as the thumbnail, title, description, status, created on and last updated on (date). On a mouse-over on the thumbnail the Artwork can be viewed in the PDF format. Click on the Artwork title to view the artwork.

Selected Artwork can be deleted by clicking on the '**Delete**' button, a copy can be made of a selected artwork and a new artwork can be created by clicking on the '**Create New Artwork**' button.

By clicking on the '**Create New Artwork**' button on the view my artwork screen, a format/template search criteria screen is displayed where the user can search for artworks/formats by entering the filter criteria's such as title contains, selecting the template type category and last updated on (date). Click on the '**Search**' button to search for the artwork **(Figure 2)**.

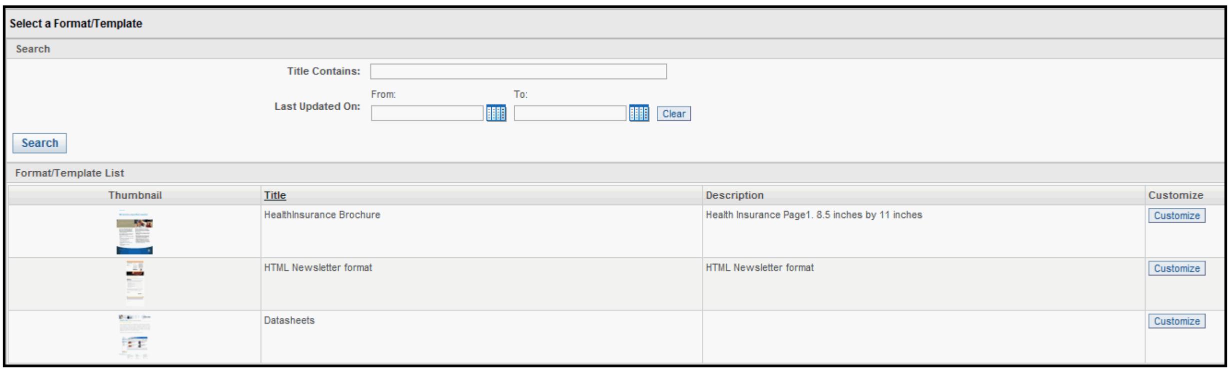


Figure No.2

All the formats/templates satisfying the search criteria are displayed. The formats with the status as released are displayed here. The thumbnail, title and description is displayed. Click on the '**Customize**' button next to the format to be customized **(Figure 2)**.

Creating a New Artwork using an Illustrator Format

On clicking on the '**Cutomize**' button **(Figure 2)**, a create artwork screen is displayed **(Figure 3)**.

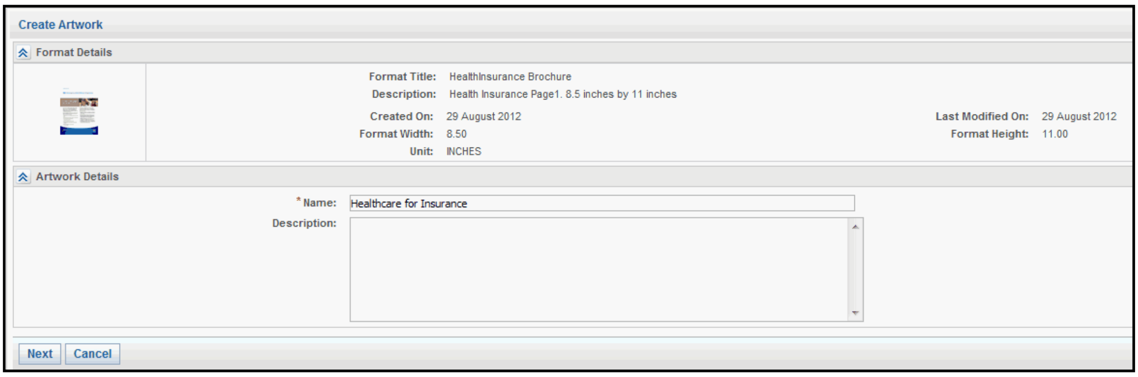


Figure No.3

On the create artwork screen **(Figure 3)** provide the name and description of the new artwork and click on the '**Next**' button. A screen with two tabs is displayed:

Point and Click

The format is displayed with the tagged elements highlighted **(Figure 4)**.

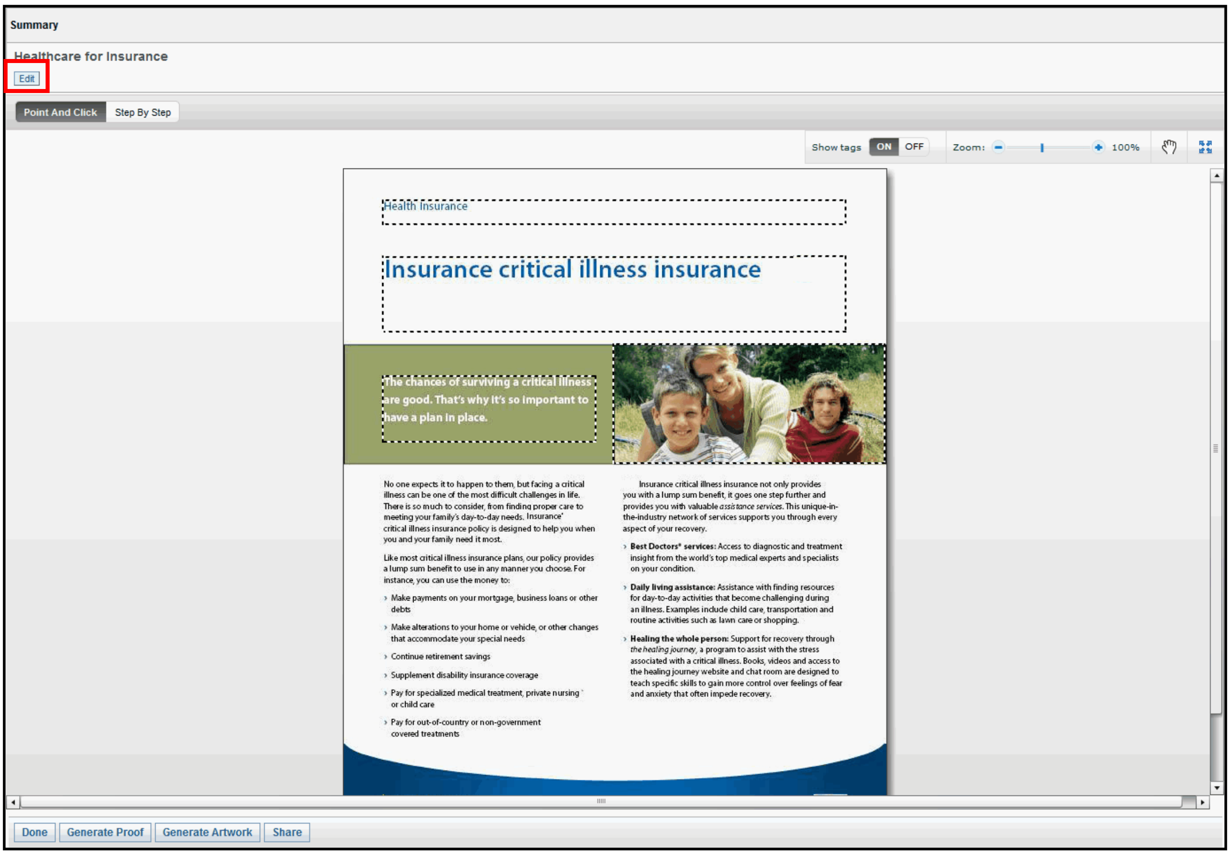


Figure No.4

By clicking on the '**Edit**' button the name and description of the artwork can be viewed and edited. The tags can be hidden, the artwork can be zoomed or panned and it can be viewed in a full screen.

For editing the text element click on the tagged text element. A edit text element popup is shown where the user can enter the desired text element and save it.

For editing the graphic element click on the tagged graphic element. A edit graphic element popup **(Figure 5)** is shown where the user can select from the options given or browse and upload a graphic element depending on the options given to the user. The image can be cropped, flipped and rotated. Save the changed graphic element.

Note: The format of the replaceable graphic element could be any of the following types: eps, ai, bmp, gif, pct, pcx, pict, psd, png, tiff, jpg, jpeg.

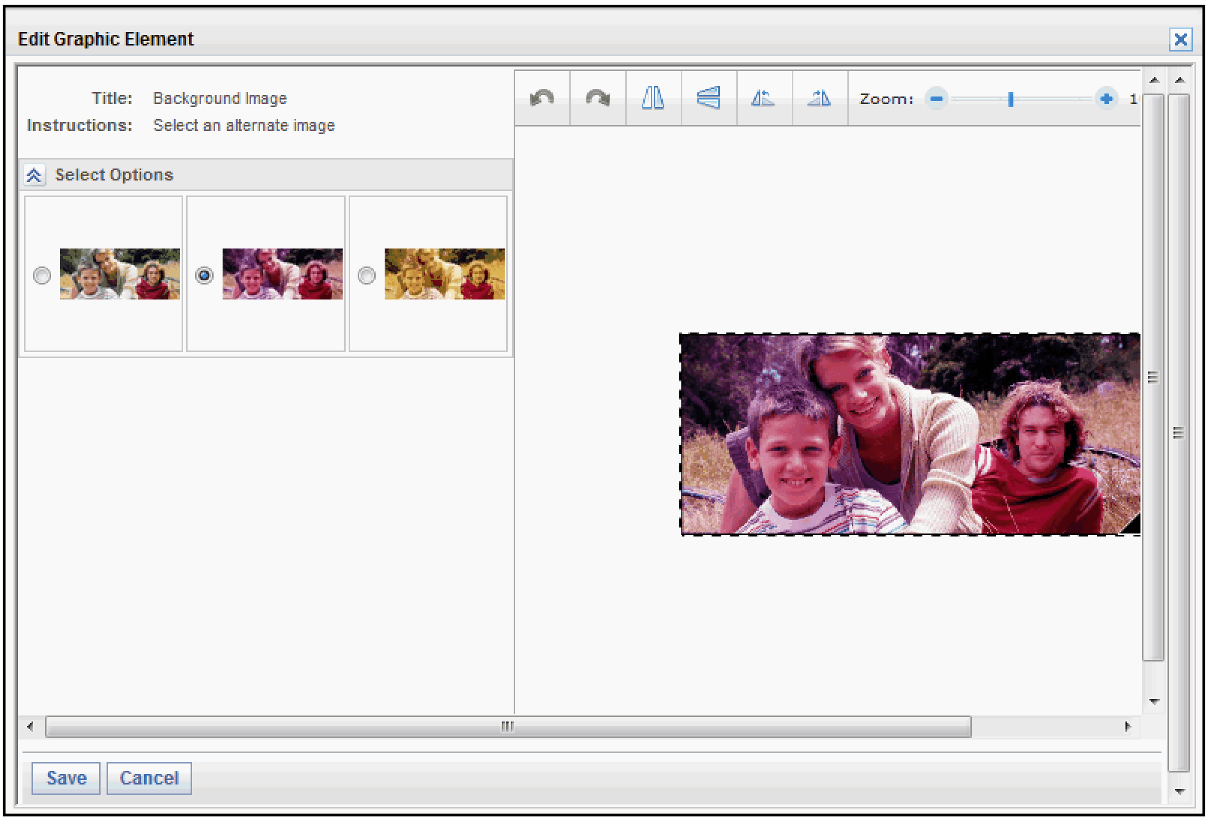


Figure No.5

Once all the desired changes are done the user can generate a proof, generate the artwork or share the artwork with specified groups/users.

Step by Step

On each page the user has to provide either text **(Figure 6)** or a graphical element as an input.

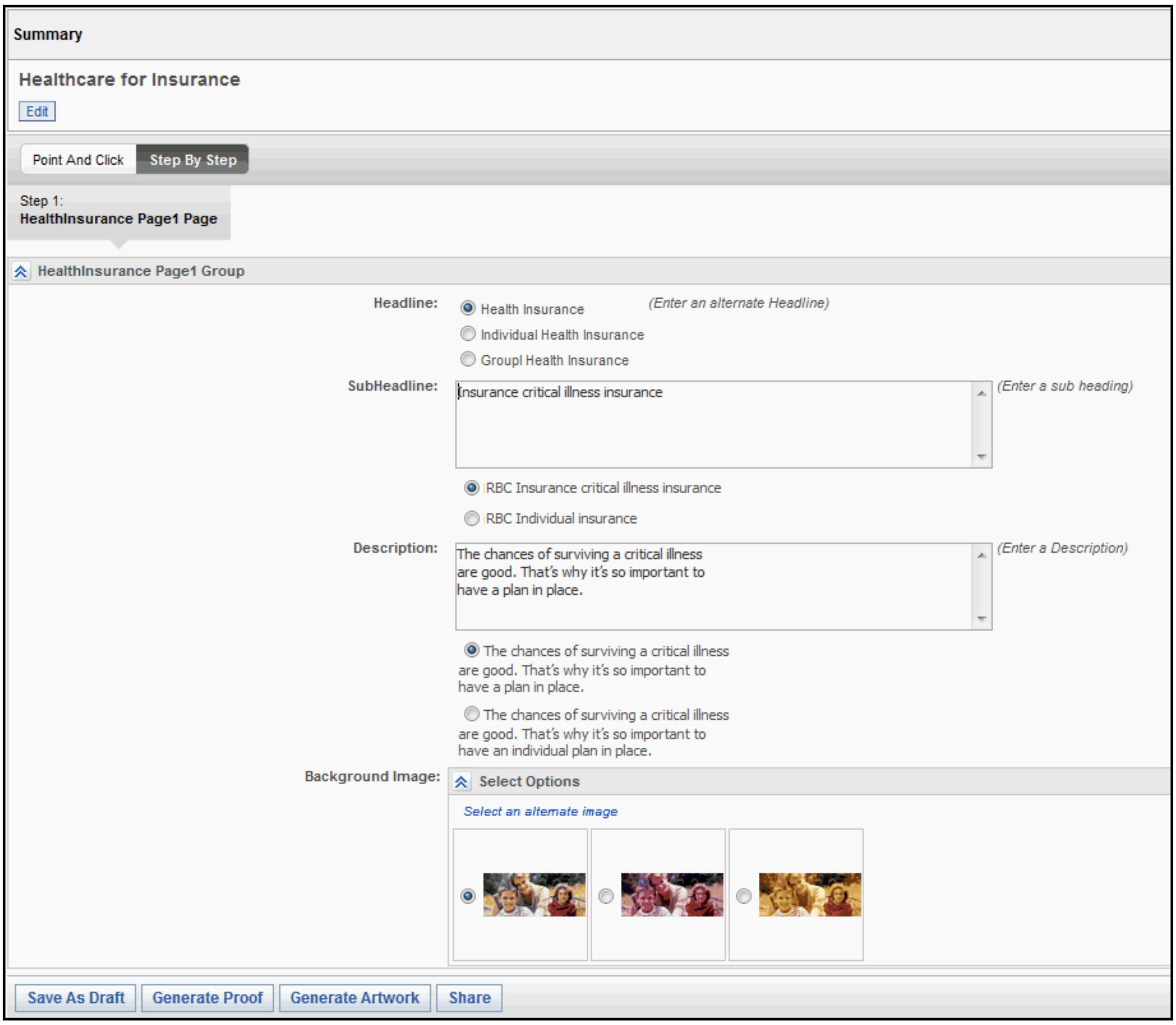


Figure No.6

Once all the information is provided on all the pages, on the last page **(Figure 6)** the user can generate the proof, Generate the artwork and share the artwork with specific users.

After generating the proof the user can view the artwork (The artwork will be displayed with a proof watermark on the PDF document to indicate that the document is a proof and not a final copy for printing), edit the artwork, email the proof, share the artwork or finalize the artwork **(Figure 7)**.

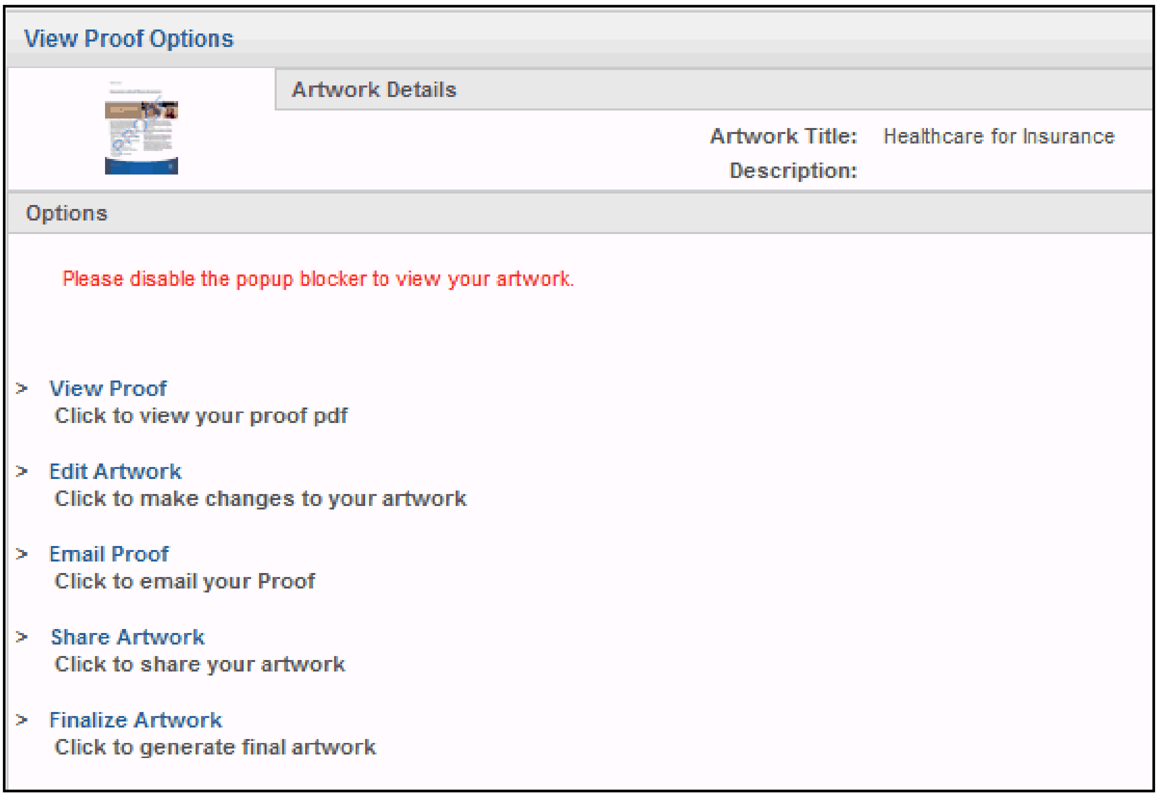


Figure No.7

After generating the artwork the user can view the artwork, edit the artwork, email it, download the zip file of the artwork, share the artwork or catalog the artwork in DAM **(Figure 8)**.

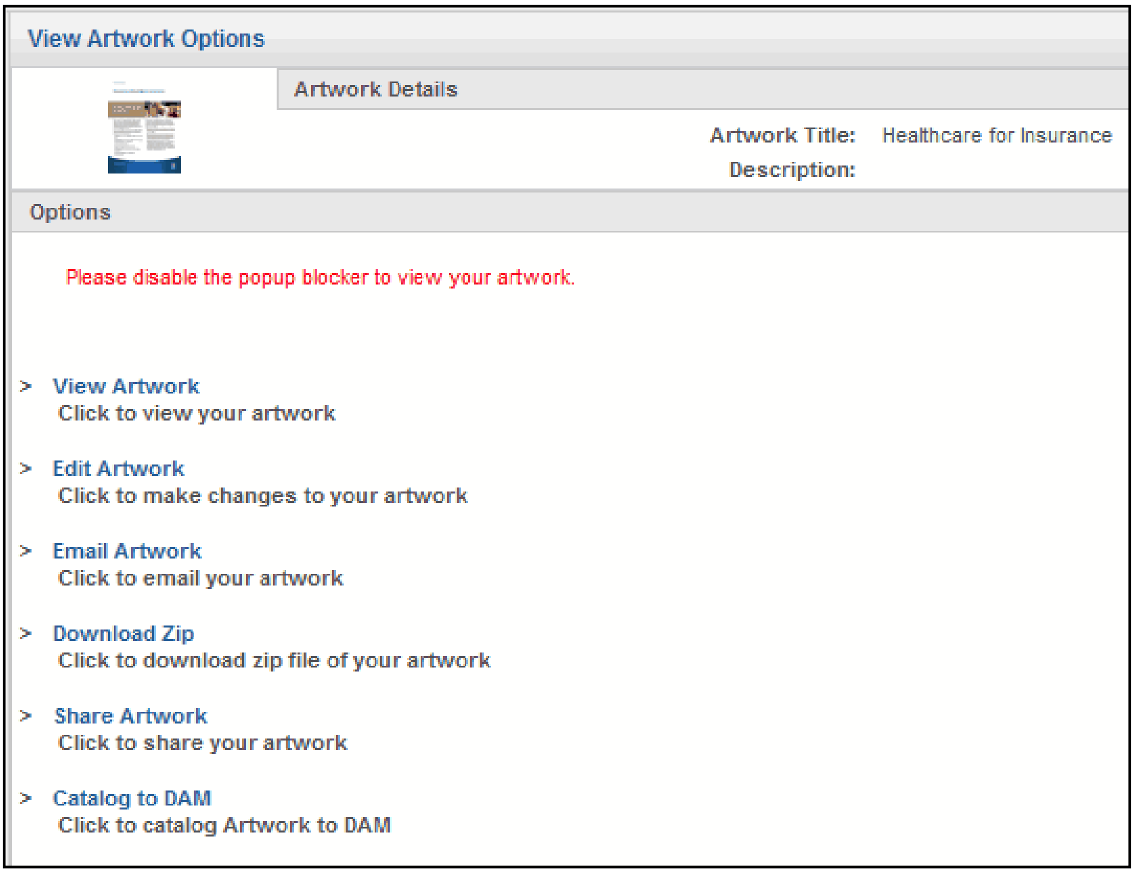


Figure No.8

Note: In Point and Click or Step by Step if any of the Text Elements are skipped by the user while customizing, the default values for those Text Elements will show up in the final Artwork.

Autogenerated Artwork based on Taxonomy

Artwork Producer allows Auto generation of Artwork. Illustrator and InDesign Formats can be configured with taxonomy based text and graphic elements. The text and graphic elements can be stored as content chunks in the Digital Library.

You can now generate your Artwork or Marketing Collateral based on taxonomy filters you input in the system. The system then pulls out the relevant content chunks from the library and generates the Artwork.

For example, your photo can be stored in the Digital Library and if you choose to customize and print marketing collateral that requires your photo. Artwork Producer will pick your photo from the library based on your logged in credentials automatically and generate the collateral.

Your sales office address and/or working hours can be stored as metadata in the library and this information can also be auto populated in the collateral and then printed.

Creating a New Artwork using an InDesign Format

The steps for creation of artwork are the same as the Illustrator. Only option available for InDesign is that the format can be resized if the option is made available to the user while creating the formats.

Now Multipage InDesign formats can be uploaded in the system as one single InDesign (.indd) file. The system uniquely identifies and separates each page of the single file. A spread layout of pages is also supported in the system.

Note: The format of the replaceable graphic element could be any of the following types: eps, ai, bmp, gif, pct, pcx, pict, psd, png, tiff, wpg, jpg, jpeg.

Support for PDFs as ready to use formats

Along with Illustrator, InDesign and HTML formats, PDF formats are now available for download and use from the Artwork Producer system. These formats do not require any generation. They can be downloaded readily used for printing.

Creating a New Artwork using an HTML Format

The steps for creation of artwork are the same as the Illustrator. After making the changes on the template the user can also save the artwork as a treatment i.e. this artwork can be used in Campaign Manager as a treatment for the campaigns.

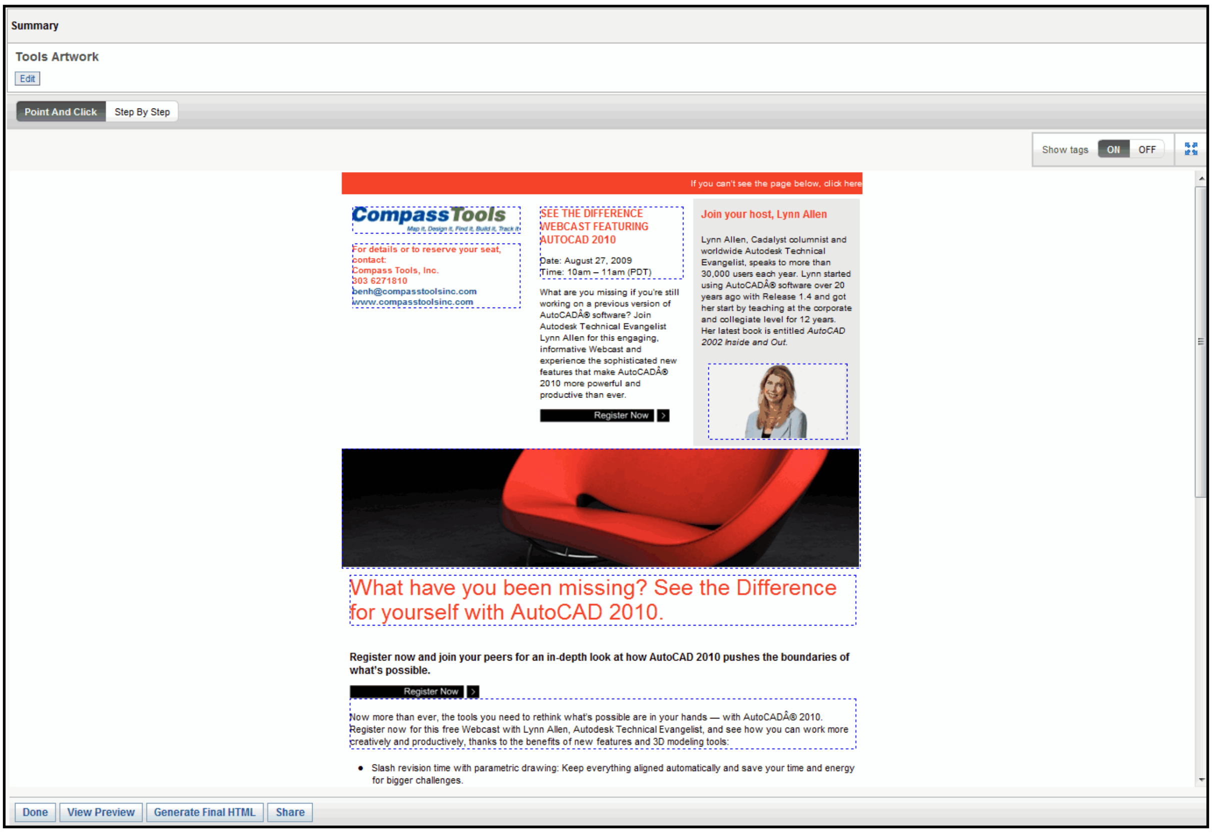


Figure No.9

Multiple artworks can be generated similar to the Illustrator format.

Note: The replaceable graphic elements could be of any type as long as it is supported by the browser.

Regeneration of Artwork in case of content chunk update

When content chunks are updated in the Digital Library, the user is alerted of changes. The Artwork generated by the user that uses these content chunks are flagged. The user can choose to regenerate the Artworks and update them with the changes in the content chunks.

The alert can be viewed on the 'View My Artwork' screen **(Figure 13)**. If any changes are made in the content uploaded in the Digital Library an alert will be displayed in red under the title of the artwork.

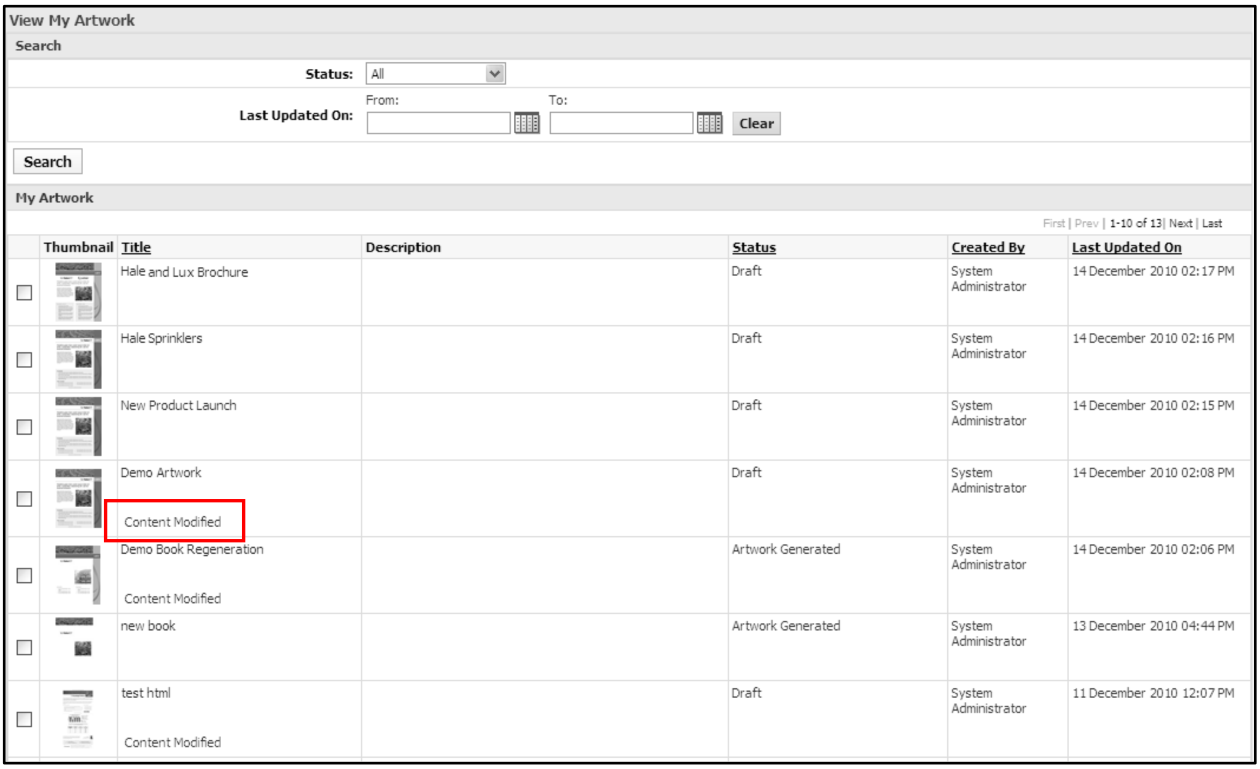


Figure No.10

If the user clicks on the title link of the artwork whose content is modified, the regeneration results are displayed with the update details of each tag that has been modified.

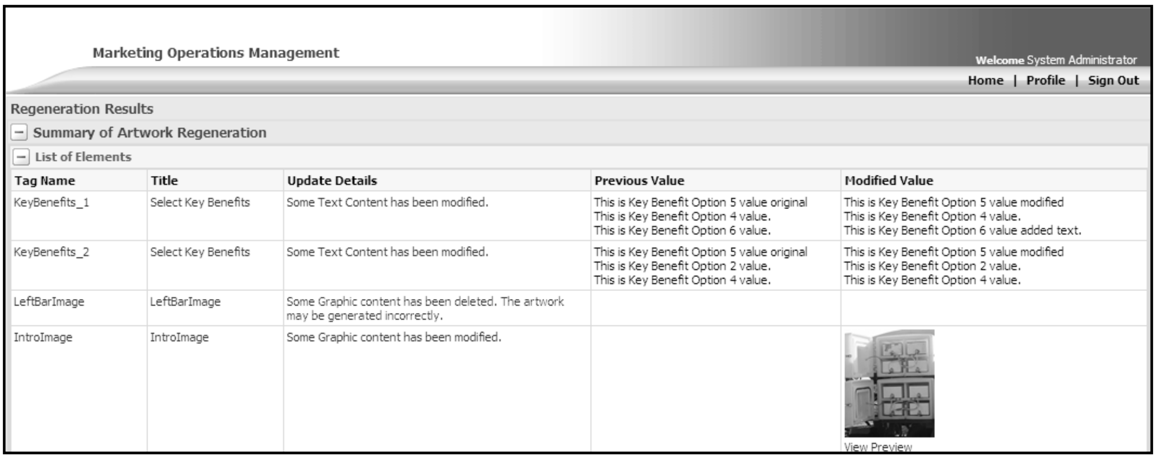


Figure No.11

The artwork gets regenerated and all the changes in the content will be reflected in the generated artwork.

Note: Once the Artwork or Collateral is submitted for generation, the user does not need to wait for the generation to complete. The user will be notified about the Artwork being ready for download or print.

Format Definition

Format definition is the module where the user can upload the template prepared by the design agency into the system and also configure the template for the end user.

A view campaigns screen is displayed with a search facility. The user can search for specific campaigns by specifying the search criteria such as campaign title contains and the campaign type and clicking on the '**Search**' button **(Figure 12)**. The result will be displayed in the campaigns section.

Each row in the campaign list shows details such as title, campaign#(number), type, description and created by. Each campaign title has a link to modify the campaign details. Selected campaigns can be deleted by clicking on the '**Delete**' button and clicking on the '**Create Campaign**' button can create new campaigns.

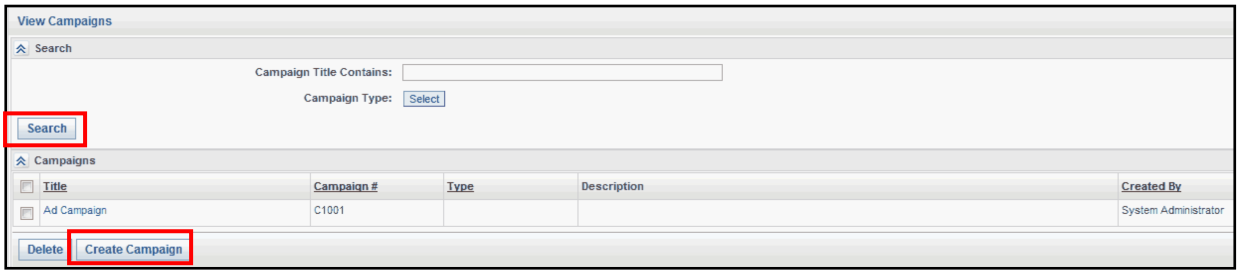


Figure No.12

Creating Campaigns

Click on the '**Create Campaign**' button on the view campaigns screen **(Figure 12).**

The following '**Create Campaign**' screen is displayed **(Figure 13)**.

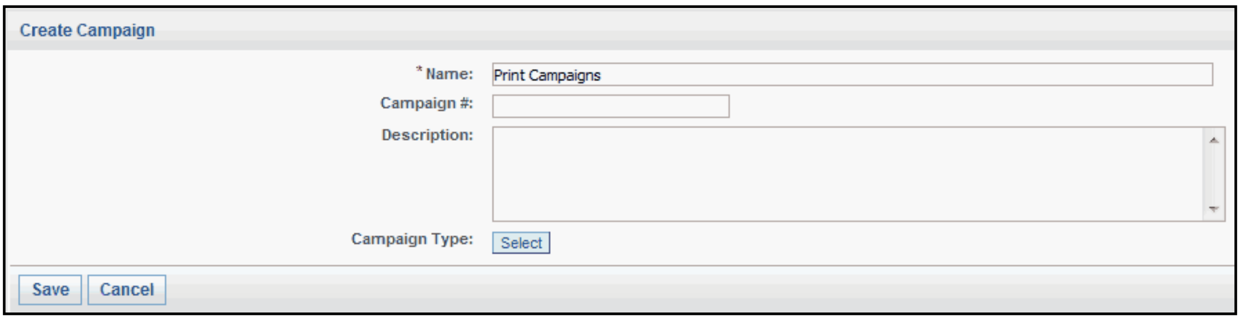


Figure No.13

The user can enter the following details:

- **Name** - The name for the campaign.
- **Campaign#** - The campaign number.
- **Description** – The description for the campaign.

- **Campaign Type** – The campaign type can be selected by clicking on the '**Select**' button.

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

Creating Designs

After saving the campaign the user is taken to view campaign screen where the campaign details are displayed and the user can edit the campaign details by clicking on the '**Edit**' button **(Figure 14)**. Clicking on the '**Create Design**' button can create new designs **(Figure 14)**.

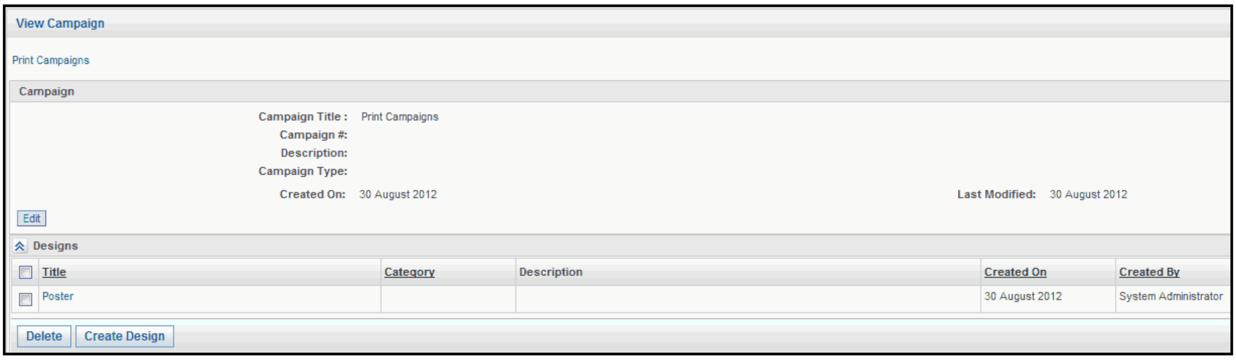


Figure No.14

The following '**Create Design**' screen is displayed **(Figure 15)** where the user can enter details:

- **Name** - The name for the design.
- **Description** – The description for the design.
- **Category** – The category of the design can be selected from a predefined list by clicking on the '**Select**' button.

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

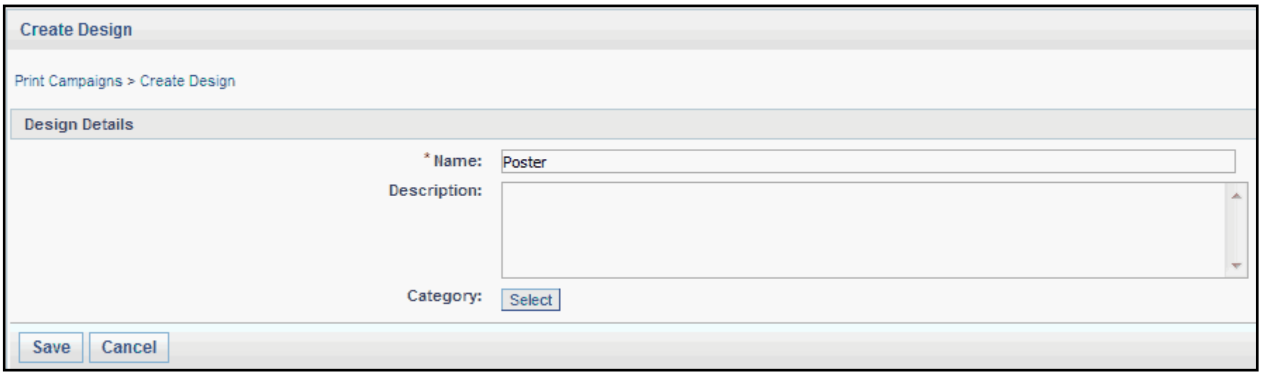


Figure No.15

Formats

After saving the design the user is taken to a create format screen where the design details are displayed and the user can edit the design details by clicking on the '**Edit**' button **(Figure 16)**. The format files present in the system can now be imported.

Creating Formats in Illustrator

Select the format type as Illustrator and click on the '**Create Format**' button to create new Formats **(Figure 16)**.

Figure No.16

The following '**Create Format**' screen is displayed **(Figure 17)** with the following sections where the user can enter the details. There are two steps in format creation:

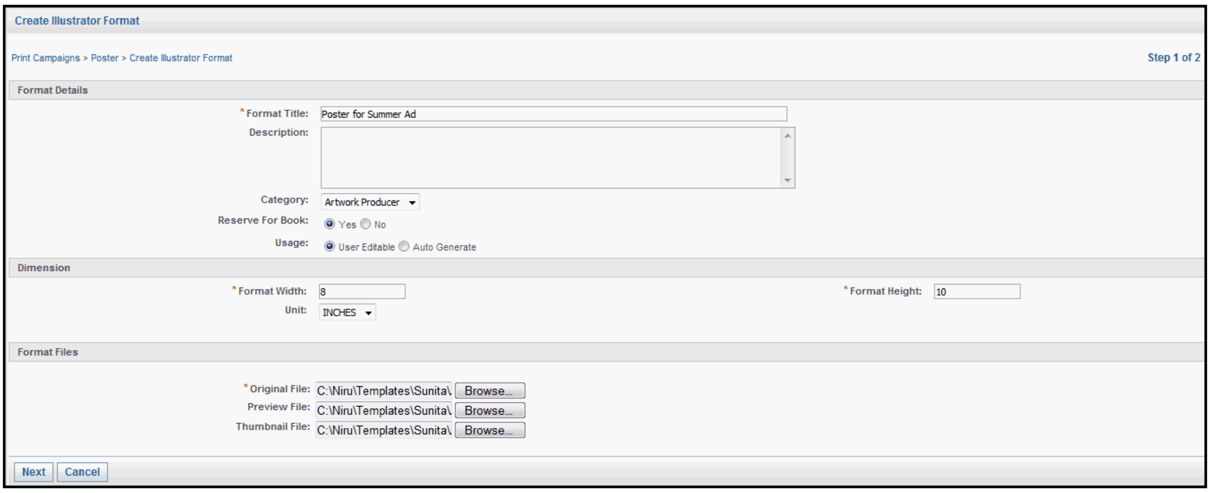


Figure No.17

Step 1:

- **Format Details:**
  - **Format Title** - The title for the format.
  - **Description** – The description for the format.
  - **Category** – The category has to be 'Artwork Producer'.

    Reserve for Book – If yes then this format will be reserved for a book and will be displayed in the list of formats displayed while defining a book type.
- **Format Width** – The width for the format.
- **Format Height** – The height for the format.
- **Unit** – The unit for the height and the width can be selected as inches, cm, mm or points.
- Format Files:
  - **Original File** – The user can browse and upload an original file, which has to be an .EPS file (Encapsulated Post Script) or a .ai file.
  - **Preview File** – The user can browse and upload a preview file, which has to be a .PDF file.
  - **Thumbnail File** - The user can browse and upload a thumbnail file, which has to be a .JPG file.

Note: The original file (EPS or AI) needs to be uploaded and the preview and the thumbnail will be generated. It is not mandatory to upload the preview and the thumbnail.

Click on the ‘**Next**’ button to go to the next step of the format creation, a view graphic elements screen is displayed where the graphic elements need to be uploaded. Click on the title link of the graphic element, an edit graphic element popup is displayed where the element can be uploaded **(Figure 18)**.

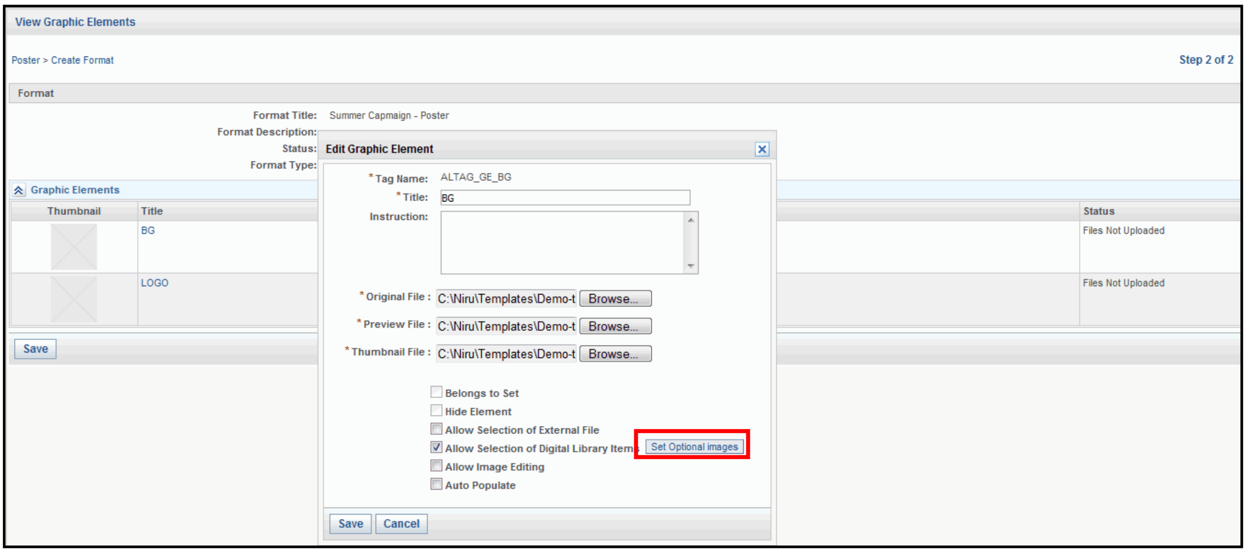


Figure No.18

On the popup the tag name is displayed. The title is displayed by default but can be changed (mandatory) and the instructions for the user. The original, preview and the thumbnail files can be browsed and uploaded.

Note: Uploading the original, preview and thumbnail is mandatory. The supporting or linked graphic images can be AI, EPS, JPG or GIF for original if the format file is AI but if the format file is EPS then the graphic element has to be an EPS file, PDF for preview and JPEG for thumbnail.

There will be four options given to the user for the graphic elements:

- **Belongs To Set** – If this option is selected, the graphical element will be used in a set.
- **Hide Element** – If this option is selected then the graphical elements become static and cannot be substituted by any other image and will not be shown during artwork generation.
- **Allow Selection of External File**: - If this option is selected the graphical element can be substituted by any other image as desired by the user during artwork generation process.
- **Allow Selection of Digital Library Item** – If this option is selected the graphical element can be substituted by assets cataloged in Digital Library under the ‘ArtworkProducer’ vault (see section 9.7.3.2). The optional images can be uploaded into Digital Library from here itself by clicking on the ‘**Set Optional Images**’ button. This will be used where the company or the organization has some defined images/logos, which will be used for artwork generation.
- **Allow Image Editing** – This option allows the user to edit the image while artwork generation.
- **Auto Populate** – This option will auto populate the image from Digital Library according to the search criteria added by the admin. The first graphic element which matches the criteria will be displayed.

Click on ‘**Save**’ button on the edit graphic element screen **(Figure 21)** to add the graphical element to the format. Once all the graphic files are uploaded click on the ‘**Save**’ button on the view graphics element screen **(Figure 21)** to save the format.

The view format screen **(Figure 22)** is displayed where even the text elements can be edited. Click on the text element tag name, a edit text element popup is displayed, the tag name is present by default and the following information needs to be provided:

- **Title** – Title is provided but the user can change it.
- **Instruction** – The instructions for the end user can be provided.
- **Tag Data Source** – Select the following:
- **None** – If this option is selected the user can enter any text.
- **Database Field** – If this option is selected the fields from the database (facet) fields will be selected which have been defined by the admin.
- **Web Service** – If this option is selected the text will be called from the web service with which has been configured in the system.
- **Auto Populate** – The text will be populated automatically according to the search criteria added by the admin.
- **Belongs to set –** If this option is selected the text element will be used in a set.
- **Hide Element** – If this option is selected then the text element become static and cannot be substituted by any other image and will not be shown during artwork generation.
- **Allow Editing** – This option allows the user to edit the text while artwork generation.
- **Allow Multiple Selections** – This option allows the user to select multiple text elements while artwork generation.
- **Type of Text Element** – In case of Illustrator formats this is disabled.
- **Type of data** – Select from the drop down.
- **Validations** – Click on the '**Configure**' button to configure the text. The maximum length for the text to be entered for the end user can be configured as well as the display of the character count can be switched on. The range of the selection can be set (min and max values can be entered).

The format can be then released for artwork generation. The Formats can be published with restricted access to only certain sets of groups and users in the system.

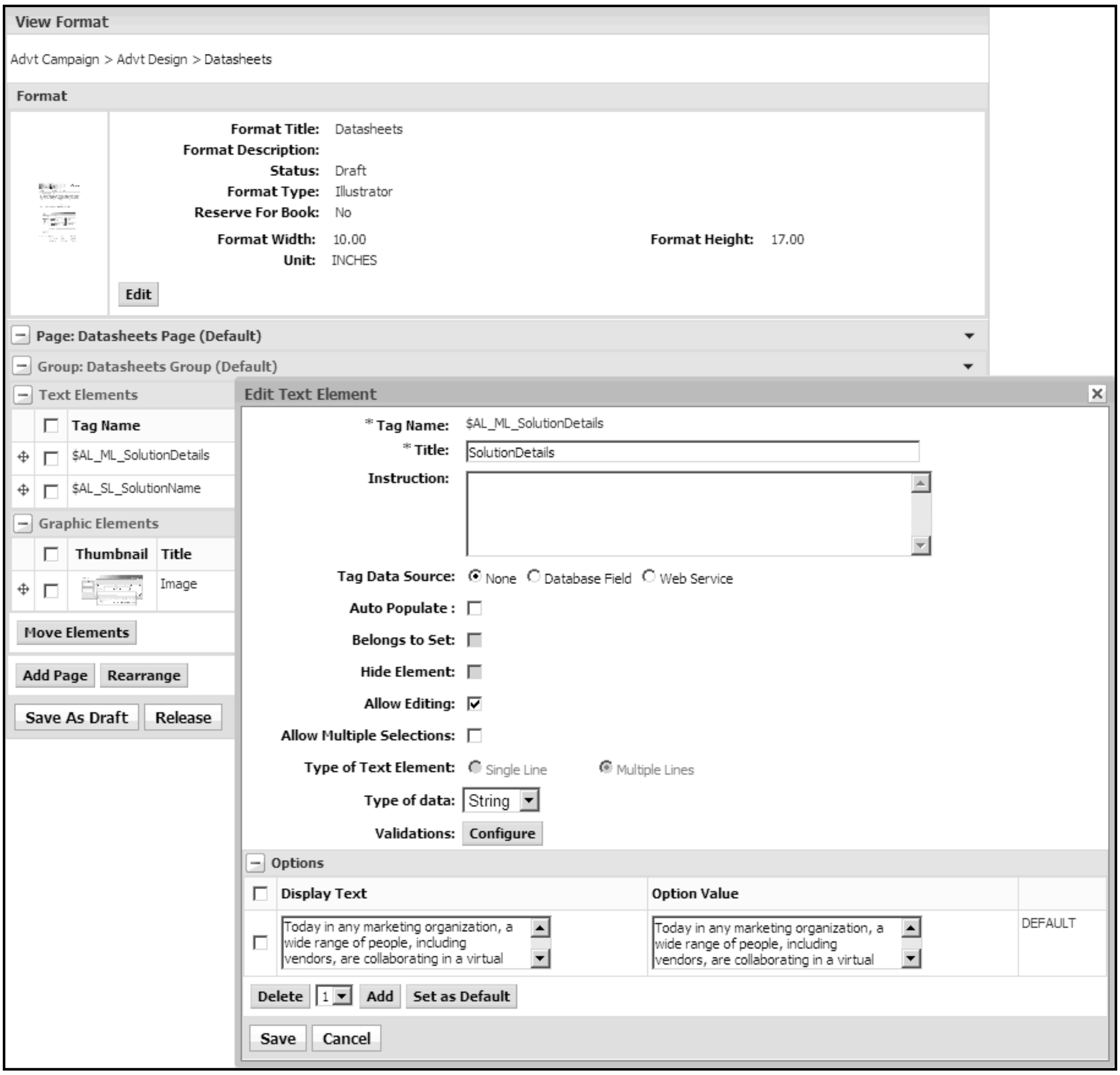


Figure No.19

Creating Formats in InDesign

Select the format type as InDesign and click on the '**Create Format**' button 2 **(Figure 19)** to create a new indesign format.

A create InDesign format screen **(Figure 23)** is displayed where the format title, description and the category can be entered. The format can be reserved for a book.

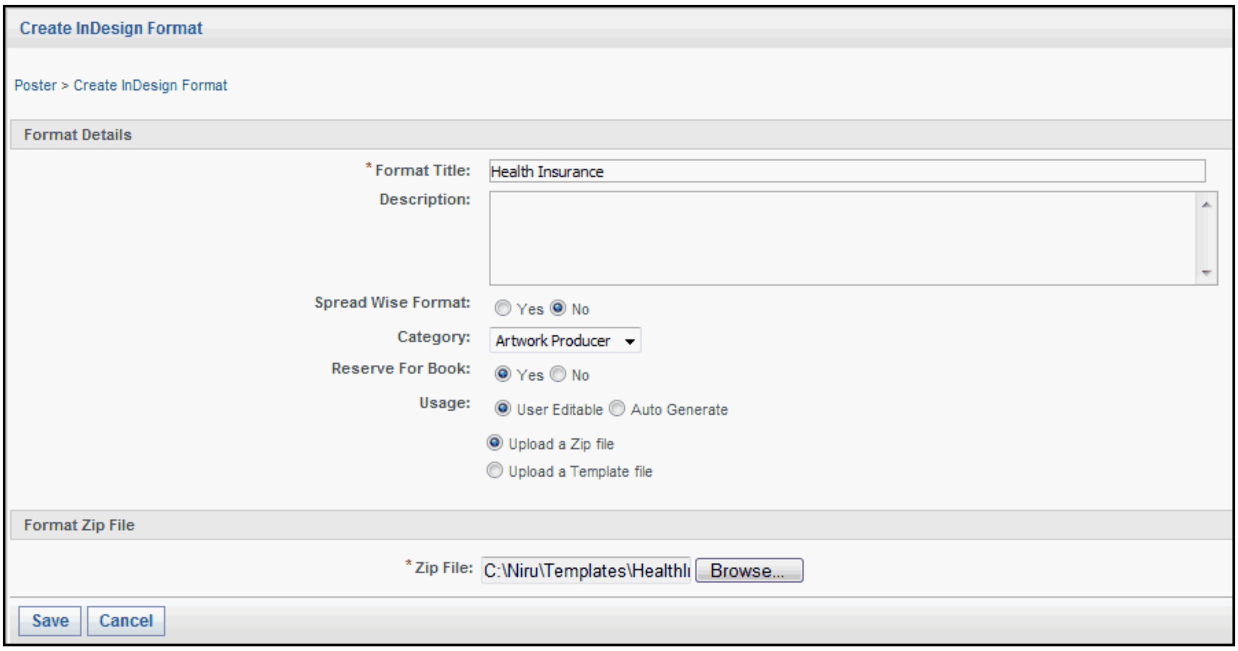


Figure No.20

The format can be uploaded in 2 ways:

1. **Zip File** – Upload the format zip files (The zip file contains all the original files related to the format, all the graphic elements related files, previews, thumbnails and the Sansui specific XML's) by clicking on the '**Browse**' button and save the format by clicking on the '**Save**' button **(Figure 23)**After saving, the format gets created and a message is displayed **(Figure 24)**.

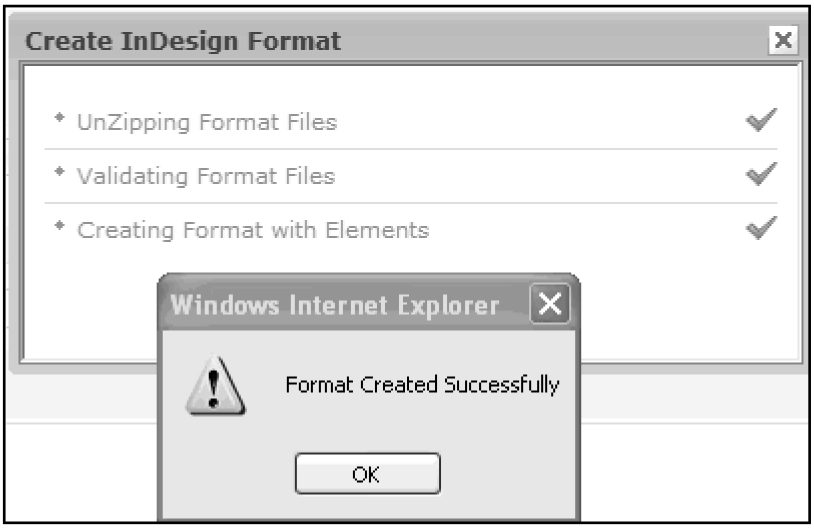


Figure No.21

2. **Template File** – The format can be uploaded in the same way as an Illustrator file is uploaded.

After the format creation is completed the user is taken to a view format screen which displays the text as well as the graphic elements. On this screen the elements can be moved, pages can be added and rearranged.

To edit the format click on the '**Edit**' button. An edit InDesign format screen is displayed where the name, description, category, format width, format height and the unit of measurement can be edited. The user can be given the option of resizing the elements by selecting the option for '**Resizable**' as Yes. If the option yes is selected then the minimum and maximum format width and height need to be entered.

The graphical elements can be changed also. Click on the '**Next**' button to go back to view format screen and click on the '**Release**' button to release the format. The Formats can be published with restricted access to only certain sets of groups and users in the system.

Creating HTML Formats

Select the format type as HTML and click on the '**Create Format**' button to create new formats **(Figure 25)**.

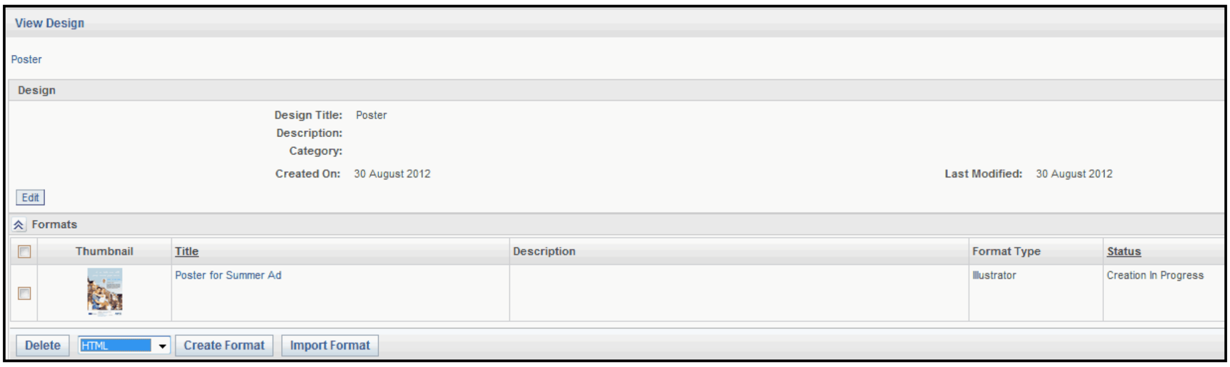


Figure No.22

A create HTML format screen **(Figure 23)** is displayed where the format title, description and the category need to be entered. Additional images which are not tagged in the template can be uploaded by clicking on the '**Upload**' button. Upload the format files by clicking on the '**Browse**' button. The following files need to be uploaded:

- **Original File** – The user can browse and upload an original file, which has to be an .HTML/.HTM file.
- **Preview File** – The user can browse and upload a preview file, which has to be a .PDF/.JPG file.
- **Thumbnail File** - The user can browse and upload a thumbnail file, which has to be a .JPG file.

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

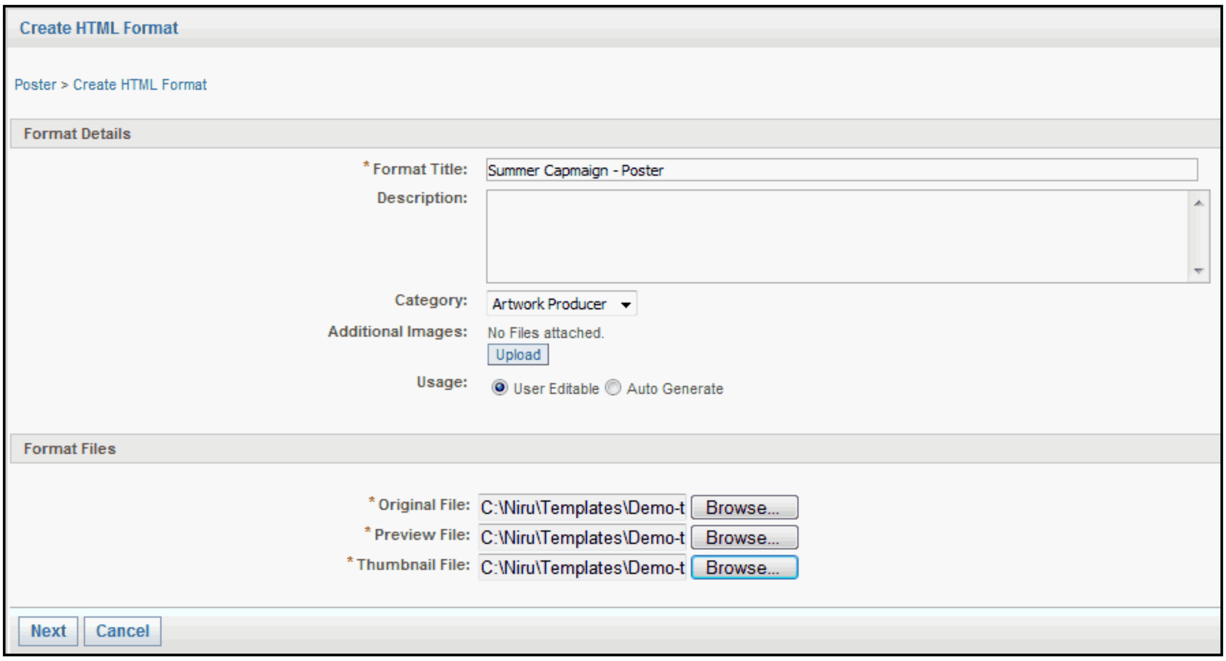


Figure No.23

Upload the graphic elements by clicking on the title link **(Figure 24)** and save the fromat.

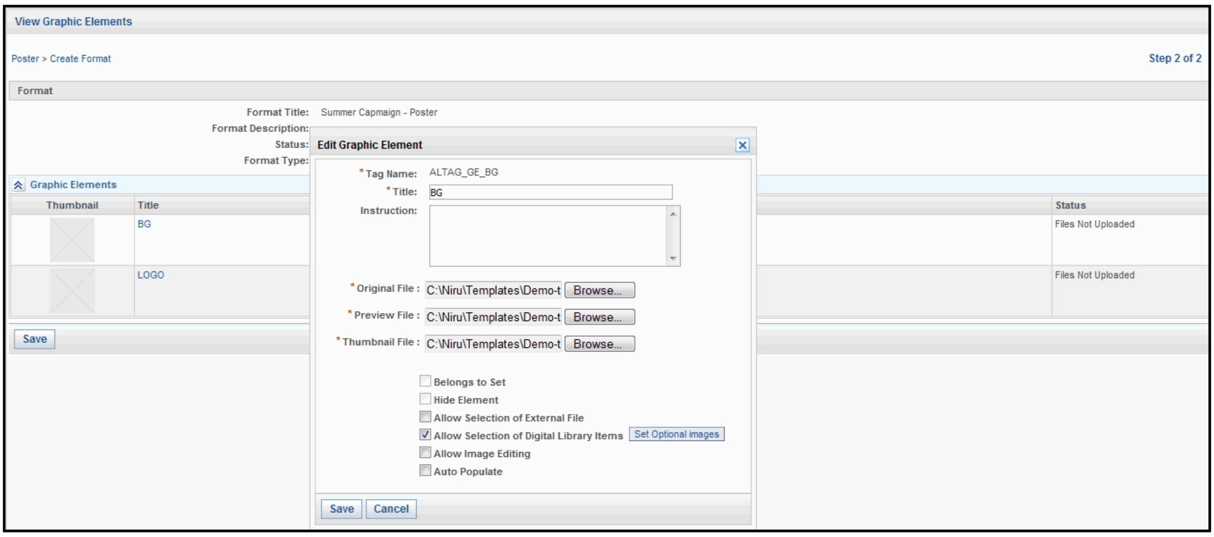


Figure No.24

On the popup the tag name is displayed. The title is displayed by default but can be changed (mandatory) and the instructions for the user. The original, preview and the thumbnail files can be browsed and uploaded. The options are similar to the ones while uploading the Illustrator or Indesign format.

Click on the '**Save**' button on the edit graphic element screen **(Figure 24)** to add the graphical element to the format.

Once all the graphic files are uploaded click on the '**Save**' button on the view graphics element screen to save the format. The user is taken to the view format screen **(Figure 28)**. The format can be then released for artwork generation by clicking on the '**Release**' button. Formats can be published with restricted access to only certain sets of groups and users in the system by clicking on the '**Share**' button.

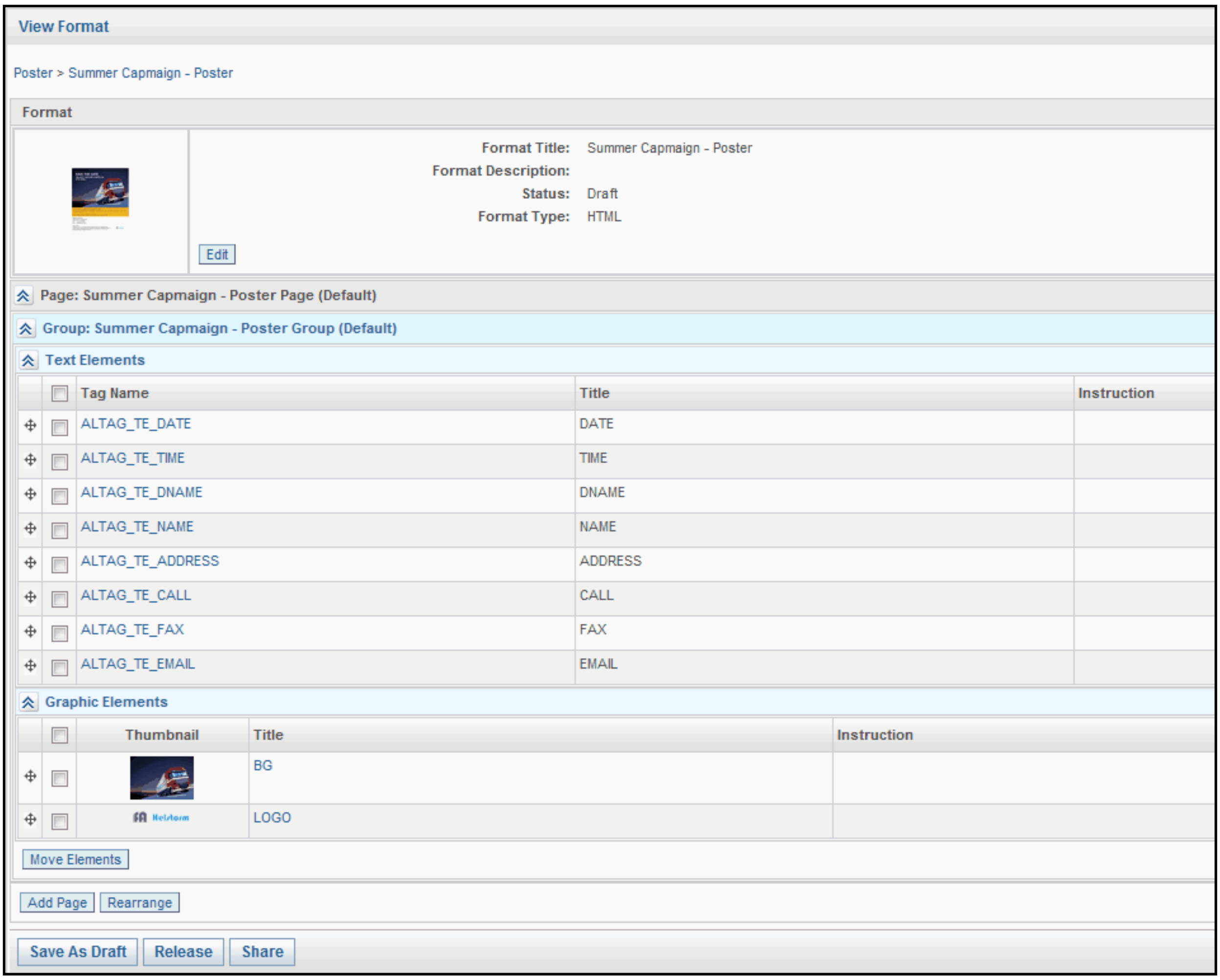


Figure No.25

Import, Export and Downloading Formats

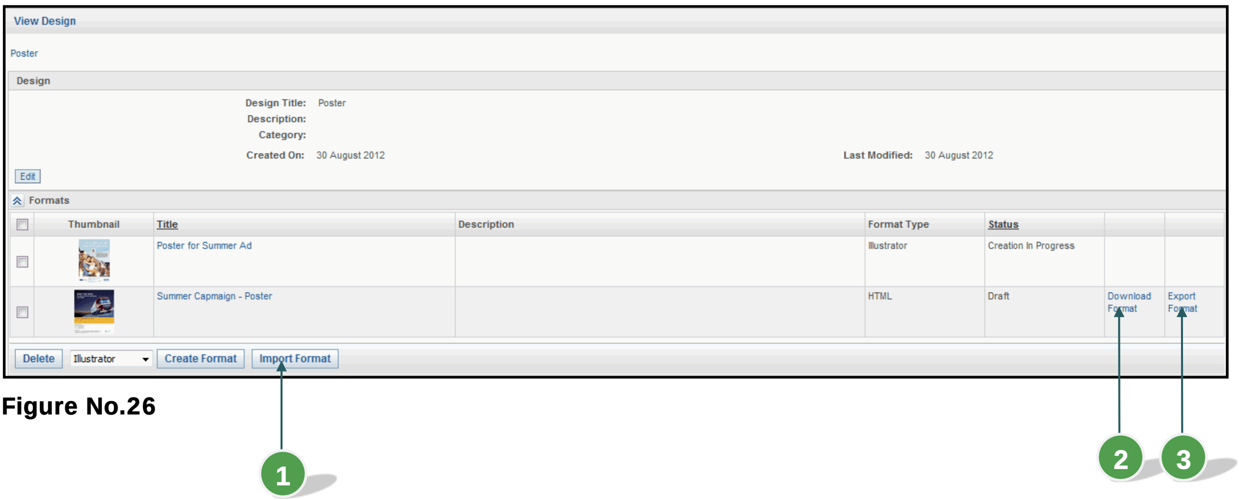


Figure No.26

1	**Import Format** – The user can import files from the system. The exported zip file can be	2	**Download Format** – The format files present in the system can now be

	imported to another design or to the Format Definition module of another installation of the system by clicking on the '**Import Format**' button on the Formats List screen.		downloaded from the Format list. The users can click on the '**Download Format**' link in the Formats list to download the Format Files along with all the linked files. This feature can be used if the Format files have to be edited and then uploaded again. A zip file is prepared with all the above-mentioned contents.
3	**Export Format** – The format files present in the system can also be exported from the Formats list. The users can click on the '**Export Format**' link in the Formats list to export the Format Files along with the Format information (text and graphic) and all the linked files. This feature can be used if the Format files have to be uploaded into another installation without having to generate the template files again. A zip file is prepared with all the above-mentioned contents.		

Pages and Groups

A design can have multiple graphical and text element. To organize them in a logically fashion they can grouped and can be put in pages. A page has multiple groups and each of them hold some of the graphical and text element, which are logically connected.

By default when a format is created/registered, a single page with a group is created for the design. To add more pages edit the design by clicking on the Format Title link on the View Design screen **(Figure 27)**. This displays a View Format screen where the user can add pages and groups to the Format. List of pages for the Format will appear on the left pane under the Artwork Page List.

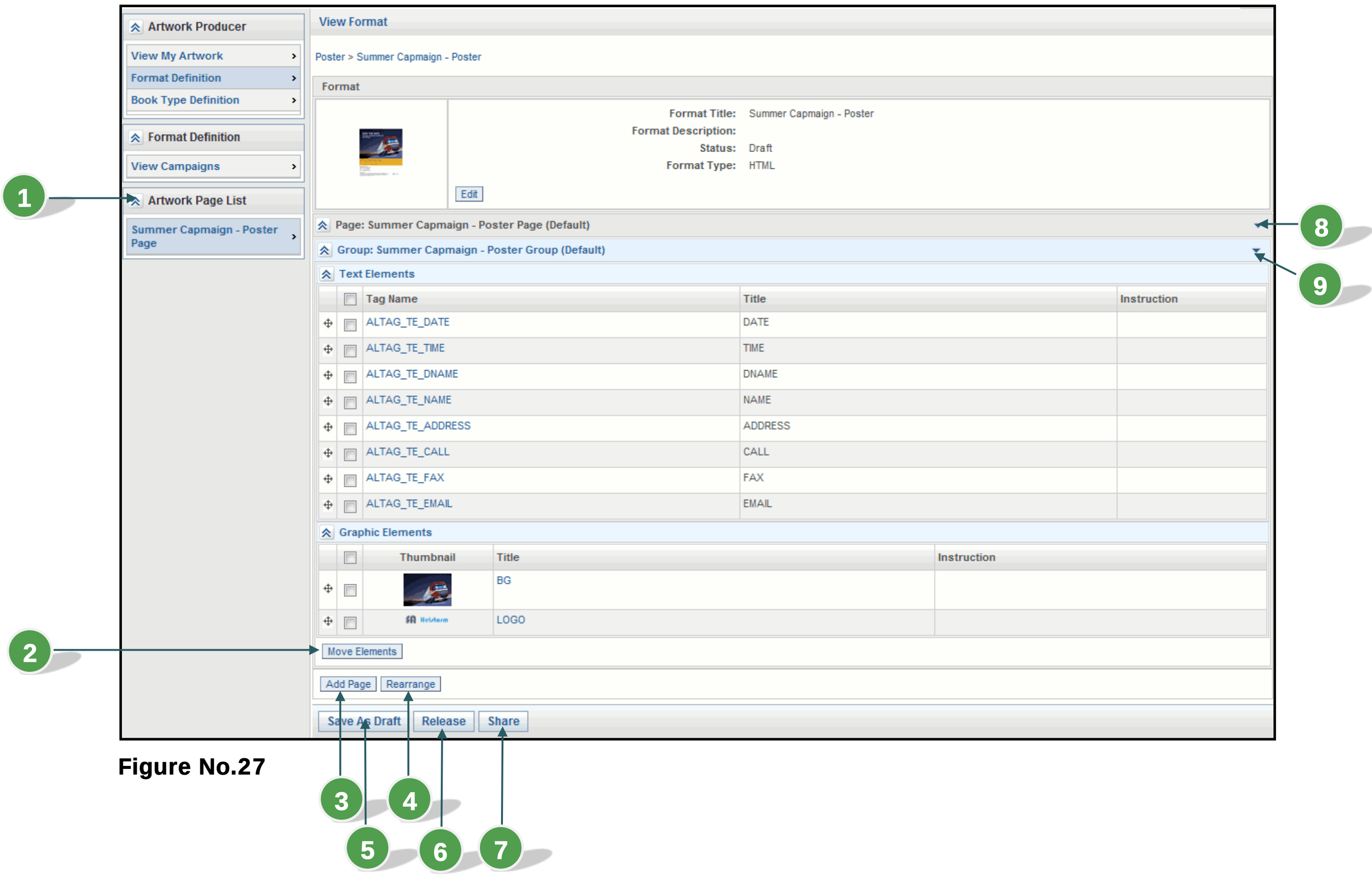


Figure No.27

1	**Artwork Page list** – Will show list of Pages for the Format.	2	**Move Elements** – Clicking on this can move the elements from one page to another.
3	**Add Page** – Will add pages to the Format.	4	**Rearrange** – When clicked a Rearrange Artwork Pages and Element Groups screen is displayed where the user can arrange the pages in order of appearance during Artwork generation.
5	**Save as Draft** – Saves as a draft and is not available for the end user till it is released.	6	**Release** – Releases the Artwork for Artwork generation and production.
7	**Share** – The format can be shared with different users		

By clicking on the icon on the 'Page: Header' bar 8 **(Figure 30)** the following page menu is displayed:

	**Add Group**: Allows the user to add groups to the page.
	Edit Page: Allows the user to modify current selected page.
	Delete Page: Allows the user to delete the current page.

By clicking on the icon on the 'Group: Header' bar 9 **(Figure 30)** the following group menu is displayed:

	**Move Group**: Allows the user to move groups to different pages. (Default group cannot be moved.)
	Edit Group: Allows the user to modify current selected group.
	Delete Group: Allows the user to delete the current group.

Book Type Definition

Book Type definition is the module where the user can create a book template using the formats uploaded in the system which can be used by the end user. When the option 'Reserve for Book' is set to 'Yes' for the formats, those formats will be available to be used in the book type definition.

Click on the 'Book Type Definition' link on the left pane. A view book types screen is displayed **(Figure 31)**. A search facility is provided to search for specific book types. A list of the book types will be displayed. A selected book type can be deleted or copied. Click on the '**Create**' button to create new book types.

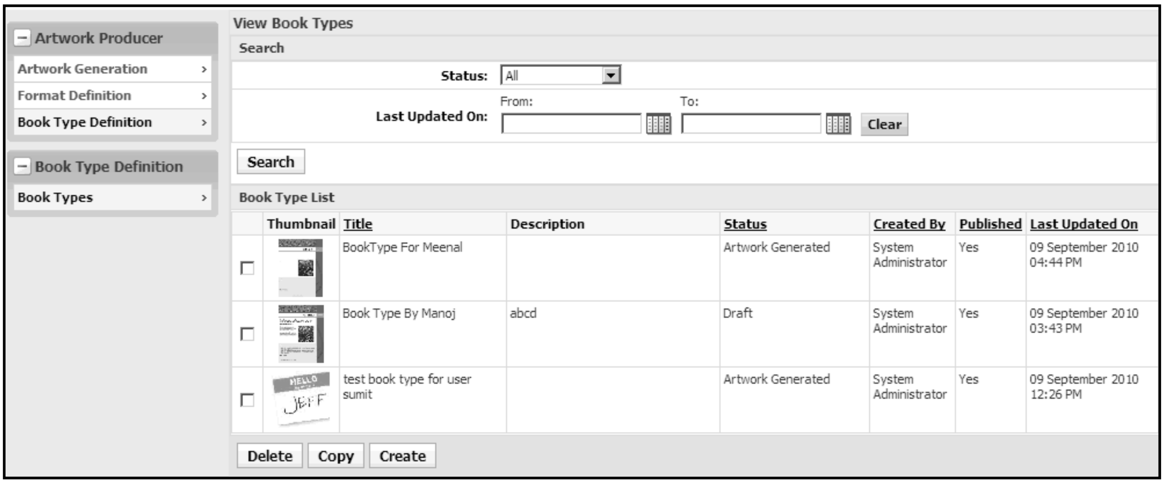


Figure No.28

A create book type screen is displayed **(Figure 32)**. Enter the title, description, category and the thumbnail file (image to be displayed for the book type).

Select whether to publish the book type.

Figure No.29

Click on the '**Save**' button. A summary screen is displayed where the book type information can be edited. The are two ways of creating the book types:

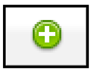
1. **Point and Click** – Pages can be added by click on  icon. These pages are the generated artwork and those which have been specified to be reserved for book type. A page can be deleted and the pages can be reordered. The tags can be switched on or off, the artwork can be zoomed, panned or it can be viewed on full screen. The replaceable graphic element can be viewed/edited by clicking on it.

Figure No.30

An edit graphic element screen is displayed where it can be edited **(Figure 34)**. The image can be cropped, flipped or rotated.

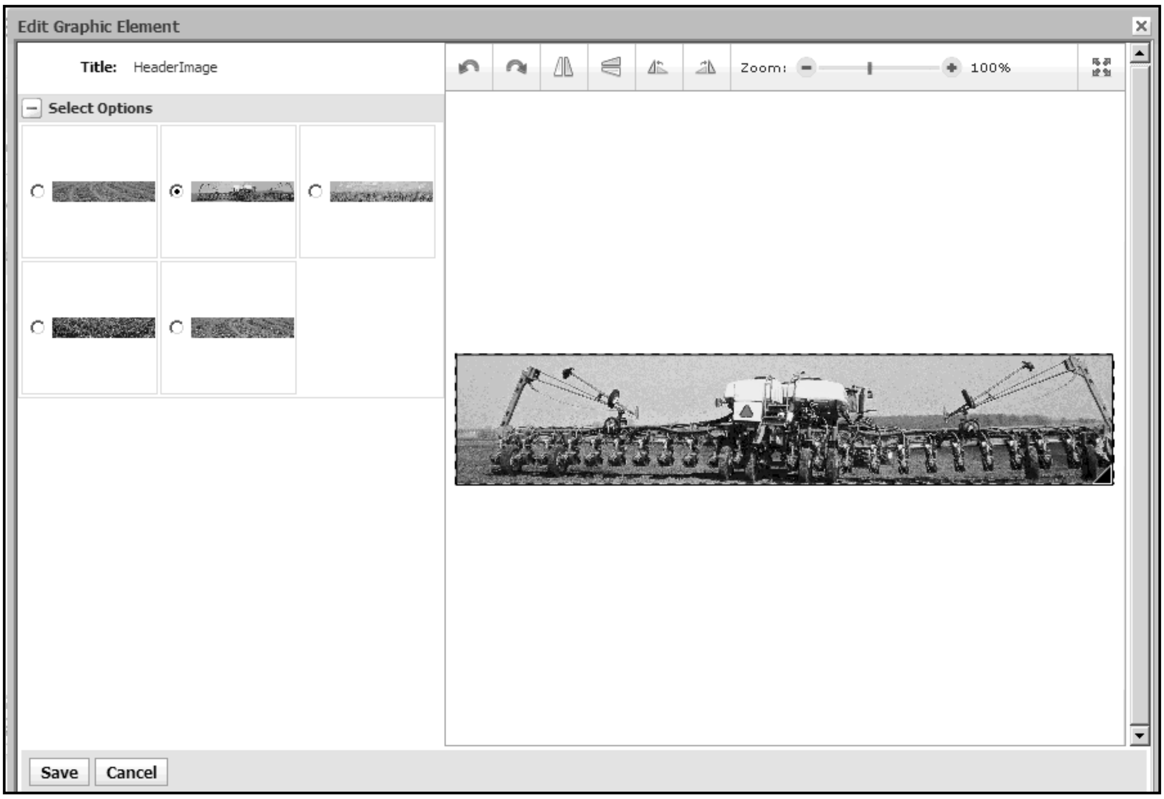
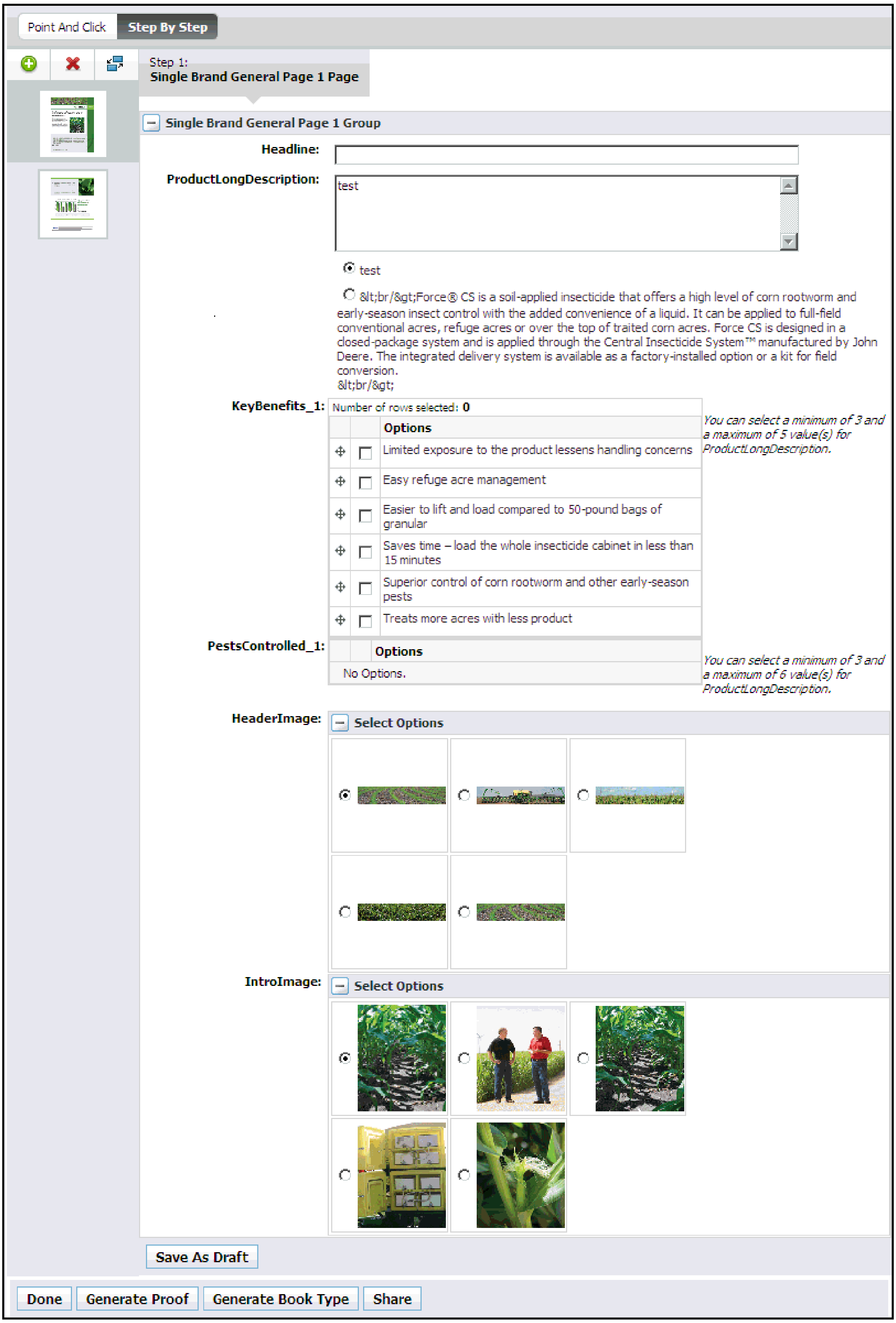


Figure No.31

2. **Step by Step** - Pages can be added by click on  icon. These pages are the generated artwork and those which have been specified to be reserved for book type. A page can be deleted and the pages can be reordered. All the page information is displayed on the right of the screen. The replaceable files are also displayed. The user can select the required images/text for the book type and then save it as a draft.


Point And Click
Step By Step
Step 1:
Single Brand General Page 1 Page
Single Brand General Page 1 Group
Headline:
ProductLongDescription:
test
test

Force® CS is a soil-applied insecticide that offers a high level of corn rootworm and early-season insect control with the added convenience of a liquid. It can be applied to full-field conventional acres, refuge acres or over the top of traited corn acres. Force CS is designed in a closed-package system and is applied through the Central Insecticide System™ manufactured by John Deere. The integrated delivery system is available as a factory-installed option or a kit for field conversion.

KeyBenefits_1:
Number of rows selected: 0
Options
Limited exposure to the product lessens handling concerns
Easy refuge acre management
Easier to lift and load compared to 50-pound bags of granular
Saves time – load the whole insecticide cabinet in less than 15 minutes
Superior control of corn rootworm and other early-season pests
Treats more acres with less product
You can select a minimum of 3 and a maximum of 5 value(s) for ProductLongDescription.
PestsControlled_1:
Options
No Options.
You can select a minimum of 3 and a maximum of 6 value(s) for ProductLongDescription.
HeaderImage:
Select Options
IntroImage:
Select Options
Save As Draft
Done
Generate Proof
Generate Book Type
Share

Figure No.32

Once the book type is ready the user can do the following:

- **Generate Proof** – A proof of the book type will be generated and it can be viewed, edited, emailed or finalized.
- **Generate Book Type** – The book type will be generated and it can viewed, edited and emailed.
- **Share** – The book type can be shared with a certain set of users/groups i.e. access can be granted/denied to users/groups.

Timesheets

As a valuable Resource of the organization, you work on various projects. The time spent on these projects needs to be tracked and accounted. The Timesheet module of SAS Marketing Operations Management enables you to enter daily hours of work against the projects you are assigned to. Other user roles such as Contributors even if they are not resources, Project Managers, Acting Project Managers, Deliverable Managers and users who have complete access on the project can fill in the timesheets. Resources that are marked as 'Obsolete' cannot enter the timesheets as a resource. But if these resources are users of the system they can enter timesheets as a user.
The Timesheet Approval modules help a group of approvers in the organization, view and approve/reject the Daily Timesheets with comments.

Key Benefits:

1. Online time tracking for Resources
2. Better accounting of actual hours spent by Resources on Projects

User Roles:

- **Resource Category Head** – A user of the system who is responsible for the allocation and monitoring of a group of Resources performing specific functions
- **Timesheet Approval Group** – A group who is responsible for the approval of the timesheet submitted daily by the Resources
- **Resource** – Users who are assigned or allocated to Projects. These Resources are expected to fill in Timesheets daily

Getting Started

Click on the '**Timesheets**' link provided on the Dashboard screen on the left task pane (MOM). The Timesheets module is launched

Two links are present on the left pane:

1. **My Timesheets**: This link is available to the Resource. Using this link the resource fills in the daily Timesheets and submits it to the Timesheet Approval Group
2. **Timesheets for Approval**: This link is available to the Timesheet Approval Group. Using this link the timesheet approvers view the submitted timesheets and approve/reject them

My Timesheets

As a Resource who is expected to fill in a Daily Timesheet, click on the 'Timesheets' link on the left pane **(Figure 1)**. A 'My Timesheets' screen is displayed **(Figure 1)** by default. The following details are displayed:

- **Project ID -** A drop down list is displayed based on the Projects the resource has been assigned to. For time spent on activities other than Project tasks, select 'Others'.

  Note: Selection of Project ID is mandatory.

  The following validations are done by the system while selecting a project while **creating a Timesheet**:

  - Project IDs of all the projects with status NEW, DRAFT and ACTIVE will be listed in the dropdown list

- Project IDs of all the projects with status ONHOLD and TIMESHEET DATE <= Due Date <= (TIMESHEET DATE + 3 months)
- Project IDs of all the projects with status COMPLETED, CANCELLED and (TIMESHEET DATE – 1 month) <= Actual Completed Date <= TIMESHEET DATE

The following validations are done by the system while selecting a project while **editing a Timesheet**:

- Project IDs of all the projects with status NEW, DRAFT and ACTIVE will be listed in the dropdown list.
- Project IDs of all the projects with status ONHOLD and TIMESHEET DATE <= Due Date <= (TIMESHEET DATE + 3 months) or if the Project ID (with status ONHOLD) was already selected for the timesheet.
- Project IDs of all the projects with status COMPLETED, CANCELLED and (TIMESHEET DATE – 1 month) <= Actual Completed Date <= TIMESHEET DATE or if the Project ID (with status COMPLETED, CANCELLED) was already selected for the timesheet.

- **Project Title** - This is a read-only column and will be auto-populated when the Project ID is selected. If 'Others' is selected in the Project ID column then this column will be empty and disabled
- **Resource Category** – The category can be selected from a drop down list. All the resource categories to which the logged in resource belongs will be listed in the dropdown. Resource category selection is mandatory
- **Description** – The description related to the task can be entered here by the resource
- **Hours** – The number of hours the user worked for the selected day and the selected Project. This is a mandatory column

  The current date will be selected by default; it can be changed by clicking on the calendar icon and selecting the date or by clicking on the 'Previous day/Next day' arrows. When the timesheet date is changed, the timesheets for the corresponding date will be displayed on the screen. Based on the status of the timesheet the timesheet details will be displayed in either editable or read-only format. The following are the Timesheet Status values:

  - Draft
  - Submitted
  - Approved
  - Rejected

  Note: The Timesheets with the status as 'Draft' and 'Rejected' can be edited. Timesheets with the status as 'Submitted' and 'Approved' cannot be edited.

Create Timesheets

To create timesheet select the Date, the Project Id, the Project title (will get automatically populated depending on the Project Id), the Resource Category (to which the resource belongs), description and the number of hours the resource has worked for (should not be more than 24 and less than 0.25 hours).

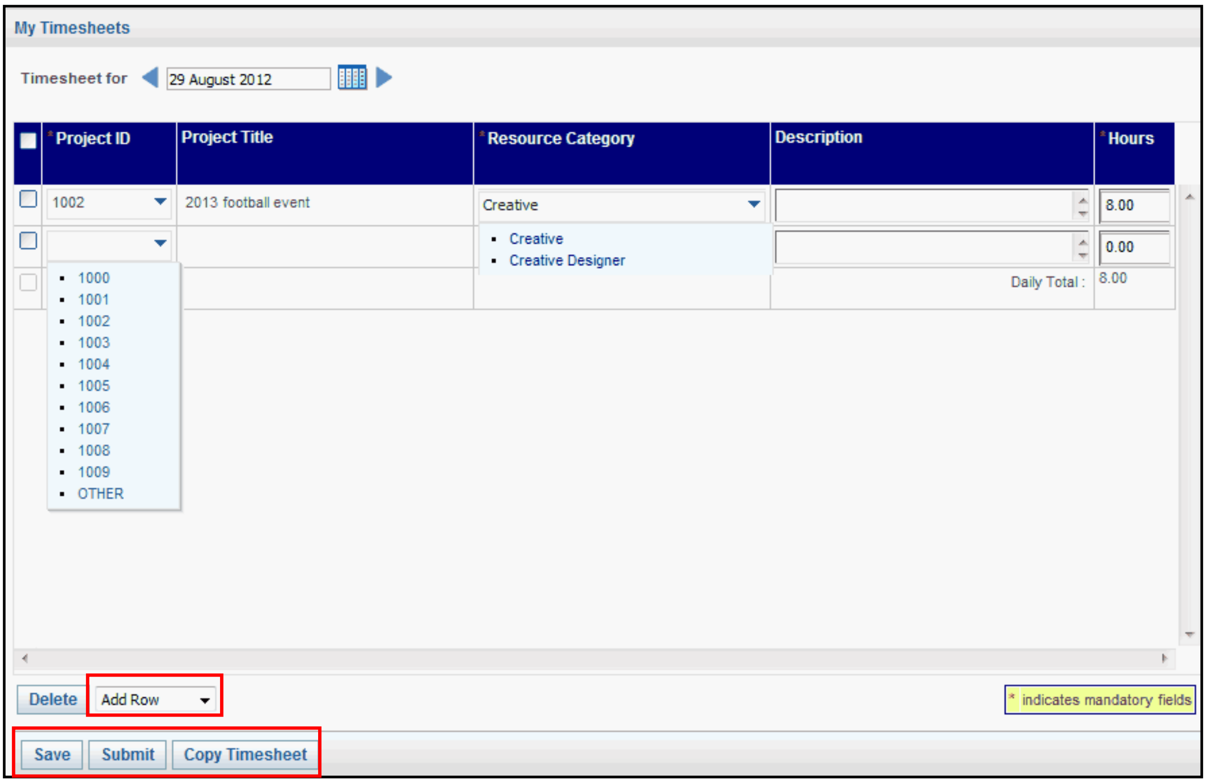


Figure No.1

The following operations can be performed on this screen **(Figure 1)**:

- **Delete** – Select the rows and click on this button to delete rows
- **Add Row** - To add another row to the timesheet, select the number of rows and the rows are added in the grid
- **Save** – Saves the created Timesheet
- **Submit** – After creating the Timesheet the resource can submit it to the User of the Timesheet Approval Group for approval
- **Copy Timesheet** – A selected Timesheet A resource can be copied by clicking on the '**Copy Timesheet**' button

Copy Timesheets

If the resource copies a Timesheet, message will be displayed on the screen **(Figure 3)** stating the Timesheet for the selected date has been copied. If the resource tries to copy a timesheet that is not saved the system prompts a Save.

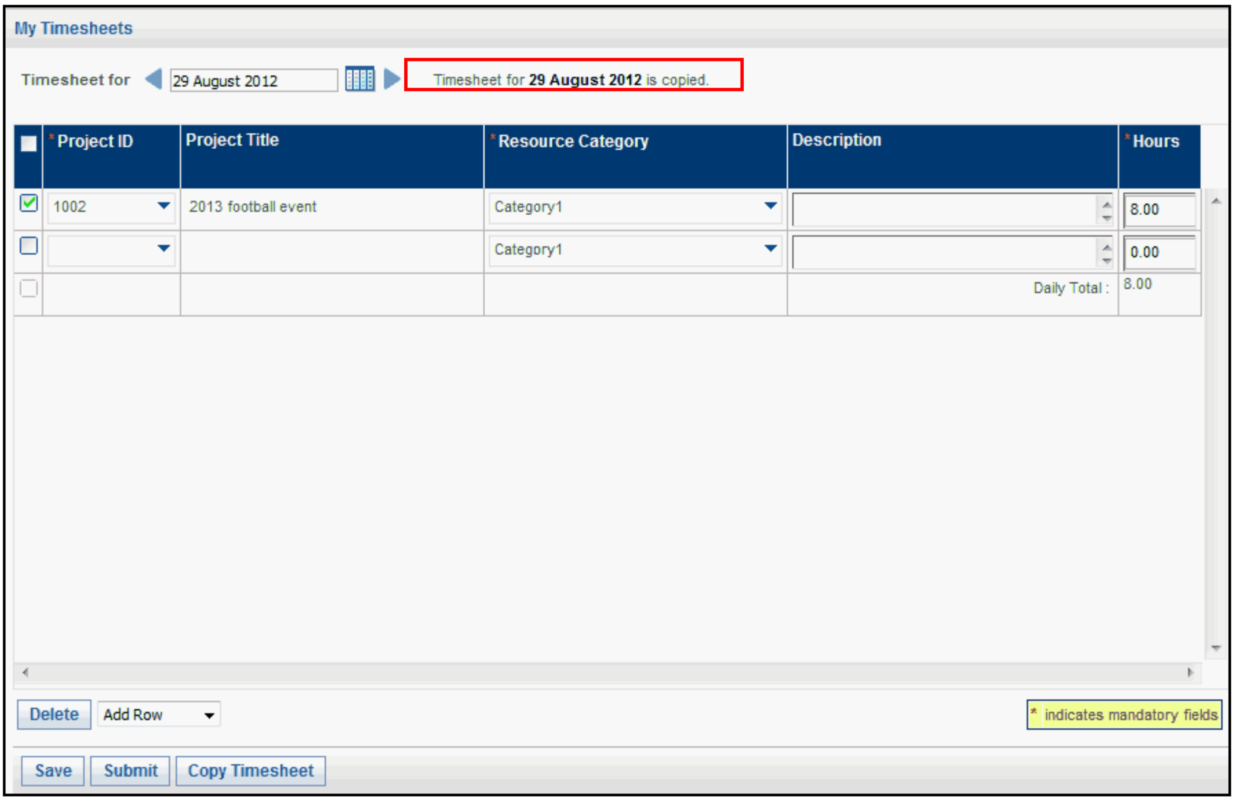


Figure No.2

Once the timesheet has been copied, select any other date for which the copy of the timesheet needs to be created. On that screen a '**Paste Timesheet**' button **(Figure 3)**. This button is visible only if a timesheet is copied. Click on the '**Paste Timesheet**' button, the resource needs to confirm whether the copied timesheet items have to be appended or overwritten. By default Append option is selected. All the timesheet items will be copied to the selected timesheet except the number of hours.

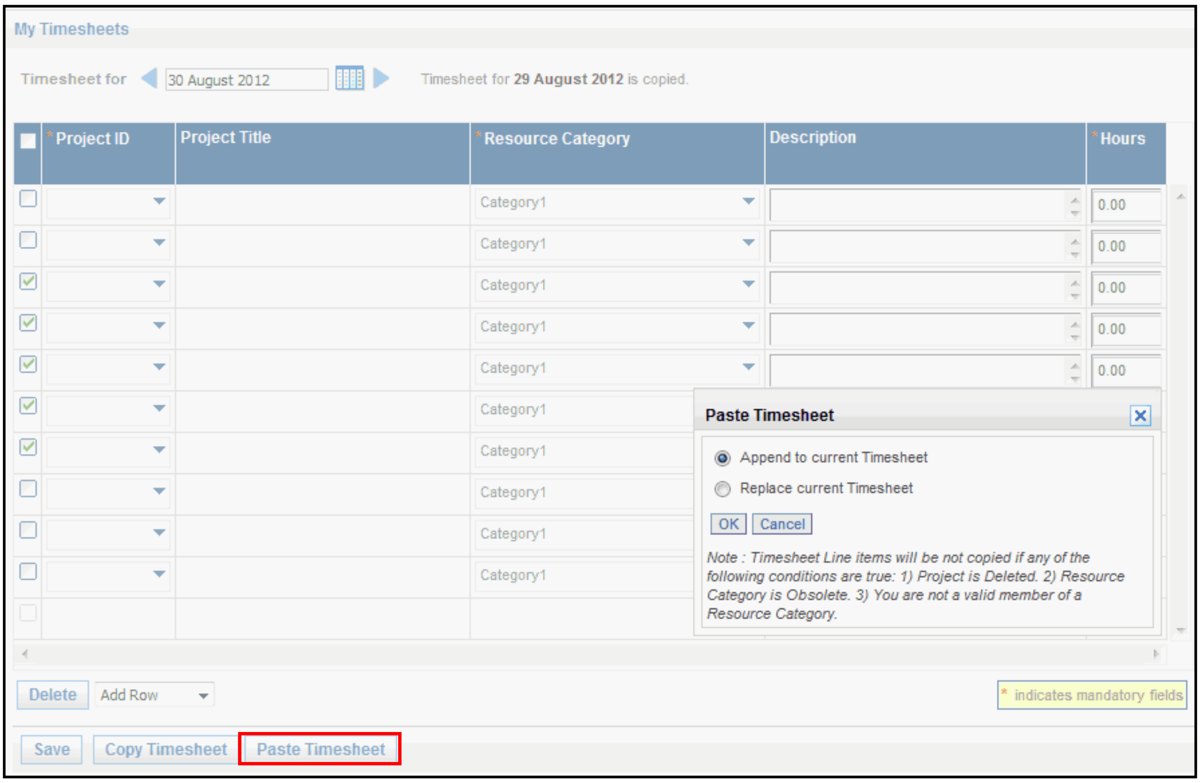


Figure No.3

After the resource submits the timesheet, the user of the Timesheet Approval Group will receive a notification **(Figure 4)** with a link to the timesheets. The notification will mention the number of timesheets that need to be approved/rejected. This notification email will be generated at 12 am.

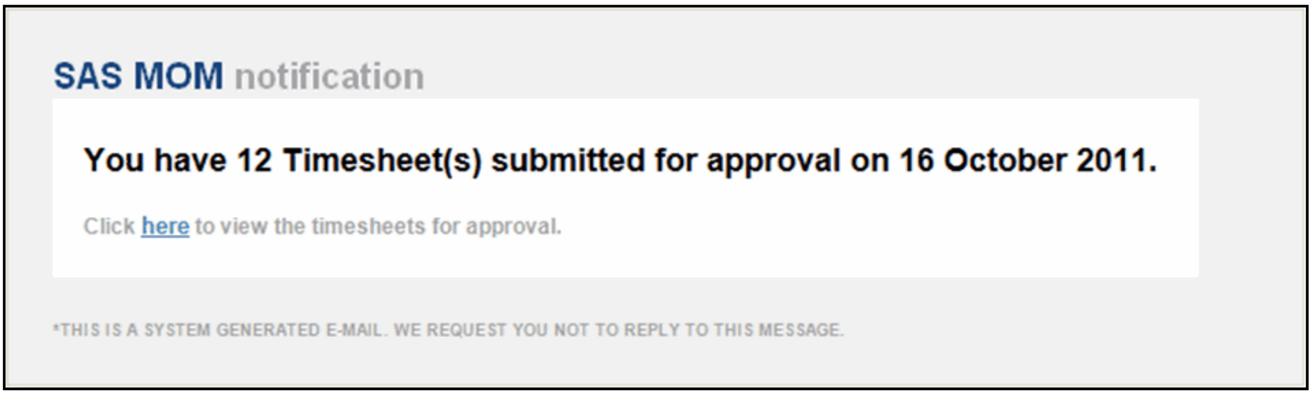


Figure No.4

Timesheets for Approval

After logging into the system as a 'User of the Timesheet Approval Group', click on the '**Timesheets**' link on the left pane **(Figure 1)**. A 'Timesheets for Approval' screen is displayed **(Figure 5)**. By default all the timesheets submitted by the resources belonging to your category will be displayed. You can search for timesheets using the filters provided in the search section.

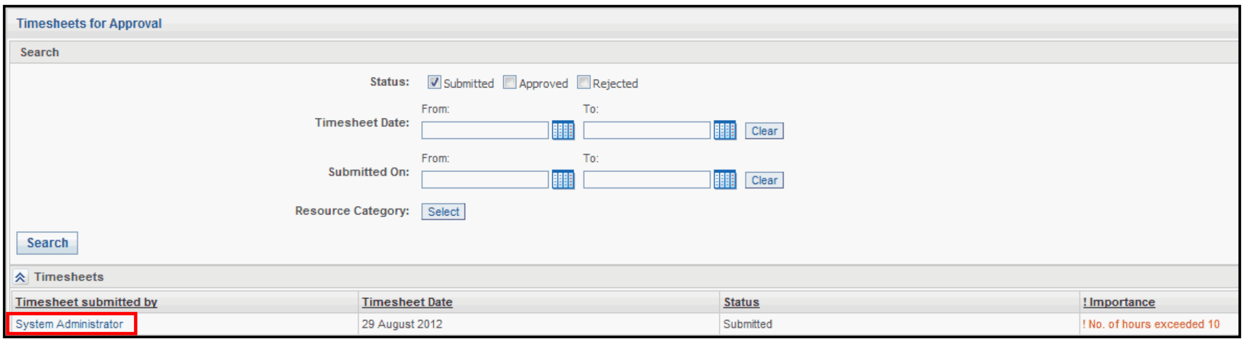


Figure No.5

Each timesheet is displayed with the following information:

- **Timesheet Submitted by** - Name of the resource/user who has submitted the timesheet
- **Timesheet Date -** Date for which the resource has filled and submitted the timesheet
- **Status** - Status of the timesheet
- **!Importance -** If there is any anomaly identified in the timesheet then it will be displayed in this column and highlighted. The anomalies can be one of the following:
    - o If the number of hours filled in the timesheet for a day are less than the available hours of the resource for that day
    - o If the number of hours filled in the timesheet for a day are greater than a specified number of hours. This number of hours are configured in the Timesheet Admin in the 'Flag Timesheet for Approval if (> number of hours per day)' setting.

Each Resource name has a link, when clicked the details of the timesheet will be displayed. An 'Approve Timesheet' screen is displayed **(Figure 6)**.

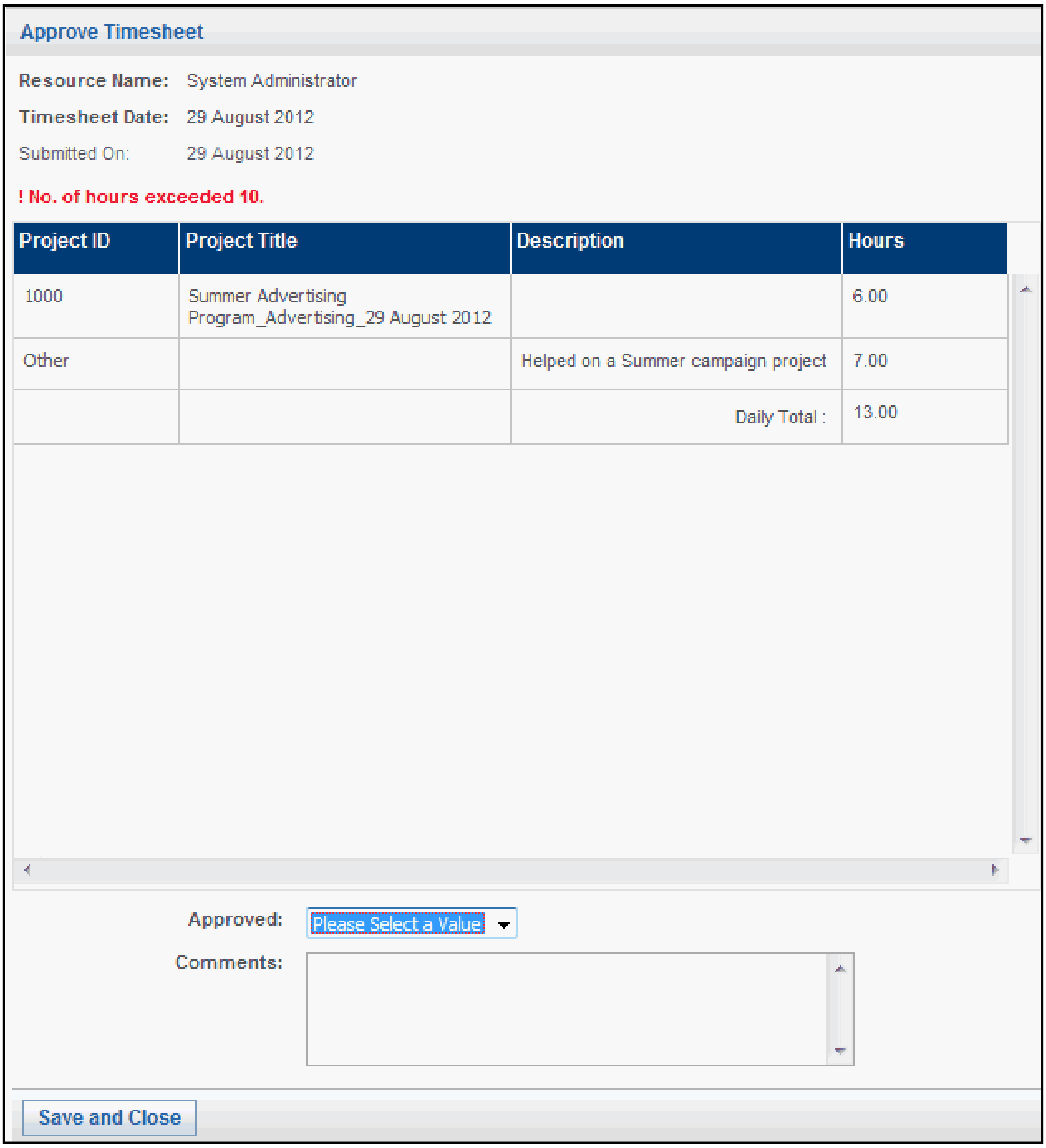


Figure No.6

The details such as Resource name, Timesheet date, Project Id, Project title, Resource Category and the number of hours the resource has worked for that particular day. You may approve/reject the timesheet and enter comments.

If the timesheet is rejected, a mail will be sent to the resource with a link. The Resource needs to click on the link to view the timesheet and edit as per your comments.

The following buttons are present on this screen:

- **Save and Close -** After saving the timesheet, the user is redirected to the timesheet approval list screen
- **Save & Previous –** By clicking on this button the previous timesheet in the list can be viewed
- **Save & Next** - By clicking on this button the next timesheet in the list can be viewed

Viewing the Timesheets for Approval Channel

Depending on the access set by the admin, this channel will be visible to certain users/groups.

Timesheets for Approval

Resource Name	Timesheet Date	Submitted On	Status
Allison Tally (Creative1)	07 December 2011	07 December 2011	Submitted
Allison Tally (Creative1)	21 December 2011		Draft
Allison Tally (Creative1)	23 November 2011	23 November 2011	Rejected
Allison Tally (Creative1)	22 November 2011	22 November 2011	Rejected
Allison Tally (Creative1)	08 December 2011		Draft
Chuck Foreman (Creative2)	07 December 2011	07 December 2011	Submitted

Figure No.7

Configuring the Dashboard Channel for Timesheets

Using the Dashboard Admin link on the left pane under the administration a channel for 'Timesheets' can be configured.

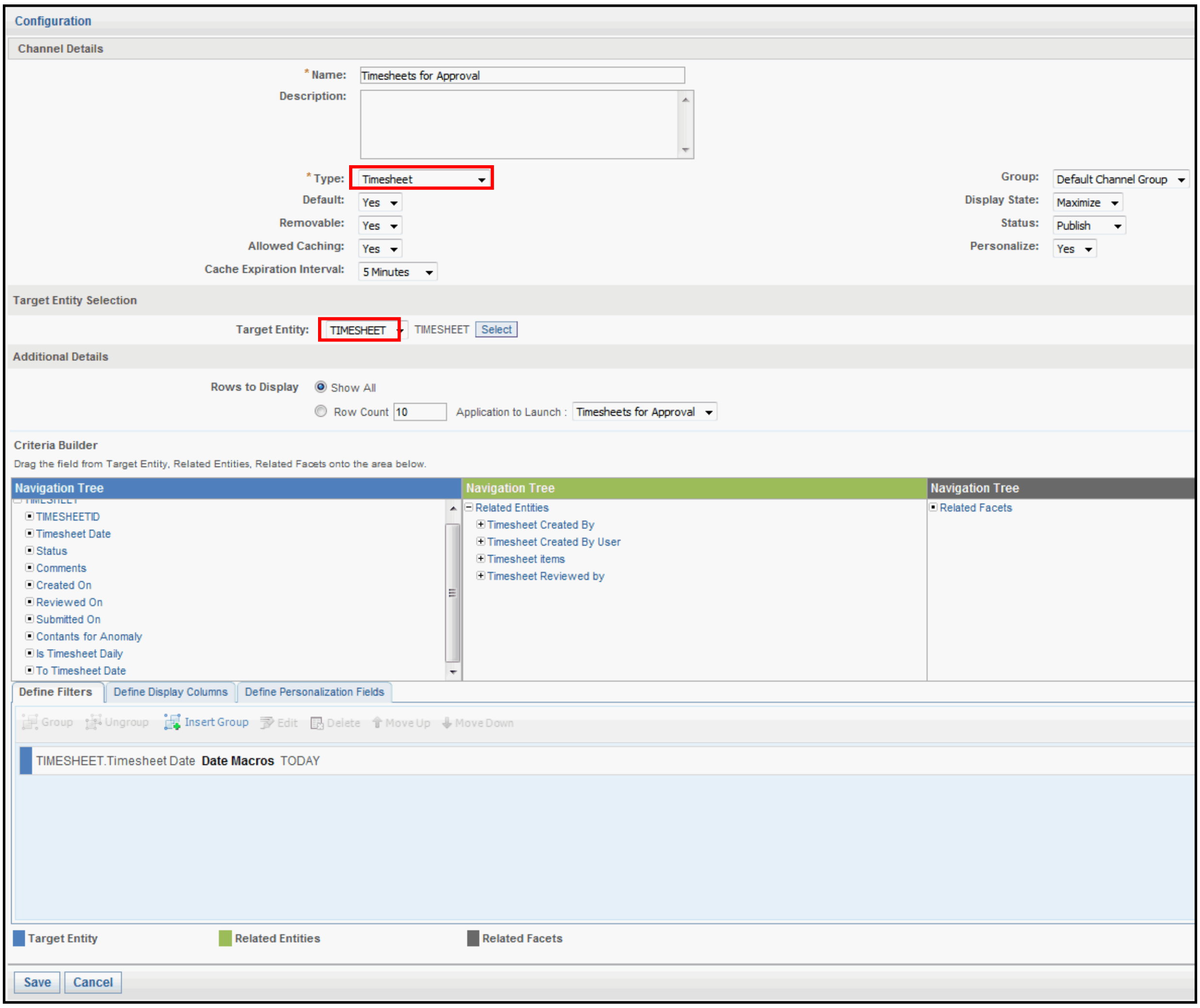


Figure No.8

Ad-Hoc Reporting

Overview

The Ad-hoc Reporting tool allows a user to easily define and generate reports based the user's needs. This tool takes care of delivery of reports which have been scheduled to a selected set of users and groups in your organization and works off an Operational Data Store (ODS) defined for the SAS Marketing Operations Management database. This tool supports all major products of SAS Marketing Operations Management which include Strategic Planner, Estimates, Marketing Workbench and Digital Library, Resource Planner, Timesheets, Forecasts and Claims Management. The data shown on the generated reports will be from the previous day.

Getting Started

Click on the '**Reports**' link on the left pane. A reports screen is displayed, on the left pane there is a link for '**Ad hoc Reports**' **(Figure 1)**. Clicking on the link the user can create customized reports.

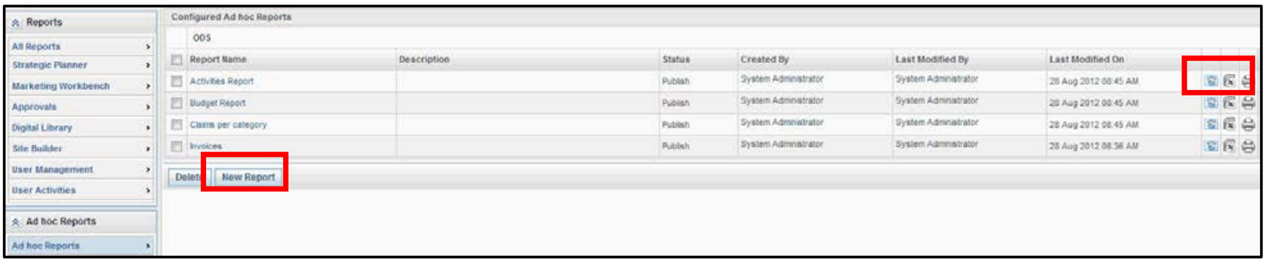


Figure No.1

After clicking on the '**Ad hoc Reports**' link, the configured reports are displayed. Details such as the report name, description, status, created by, last modified by and last modified on date is displayed. The report can be viewed, exported to excel and printed.
Clicking on the report name allows the user to modify the report details such as the filters used for the report, scheduling the report and the access to the reports.

Creating and scheduling new Reports

To create new reports click on the '**New Report**' button. A report details screen **(Figure 2)** is displayed where the report name, description and status needs to be entered. Save the details to continue.

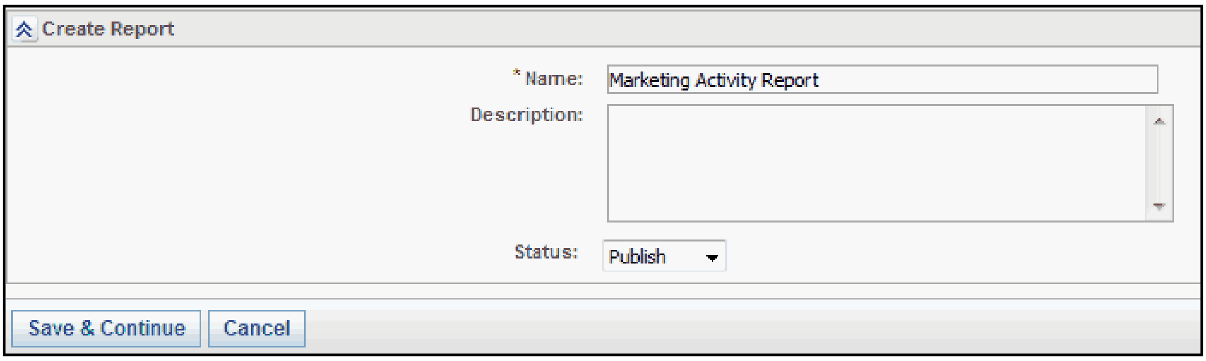


Figure No.2

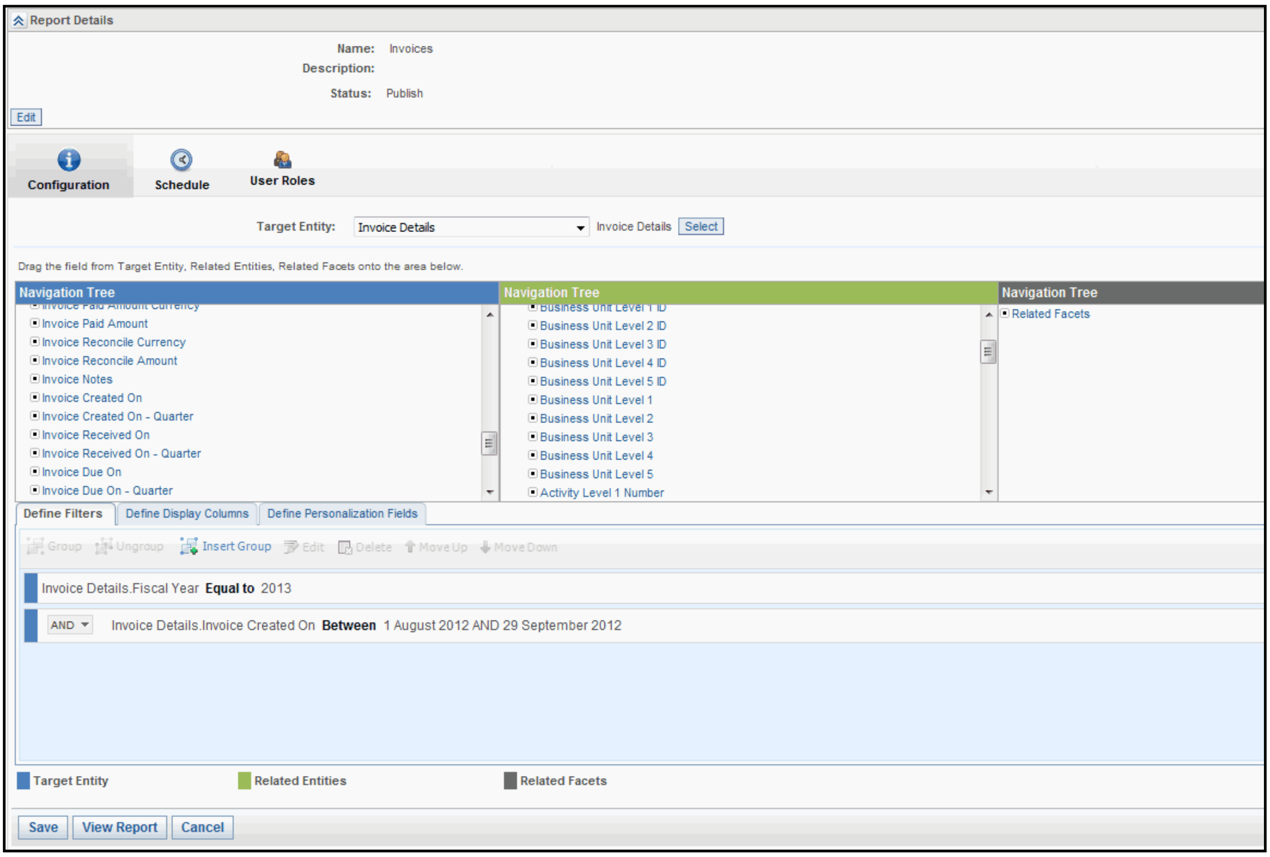


Figure No.3

A reports details screen **(Figure 3)** is displayed with the details which can be edited. Following three tabs are displayed:

1. **Configuration** – The filters for the report can be defined here by dragging and dropping the fields into the '**Define Filter**' tab below. When the fields are dragged into the filter tab a select filter popup is displayed where the following can be specified:
   a. Filter name: This specified by default.
   b. Operator: Select the operator from the drop down box.
   c. Filter Value: Enter the filter value. Click on the 'Add' button to add the filter

   The following actions can be performed in the define filters tab:
   a. Group: To group the defined filters, select the filters by holding the 'Ctrl' button and click on the 'Group' button.

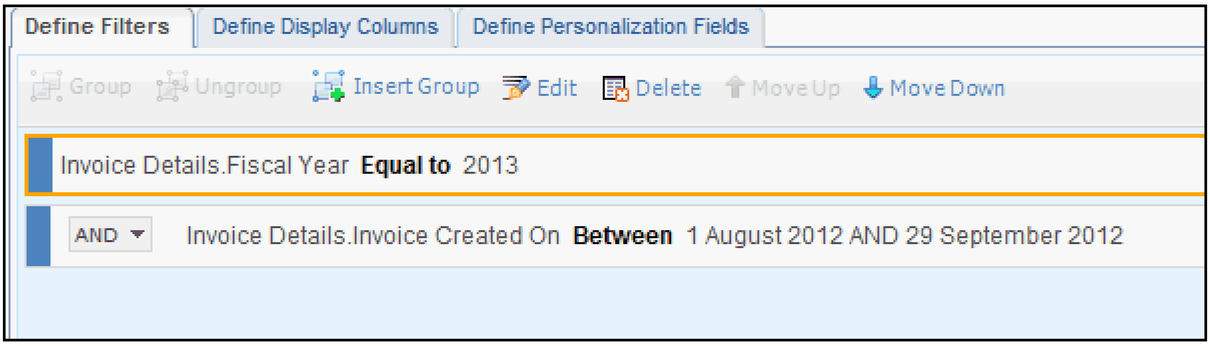


Figure No.4

b. Ungroup: Select the group and click on the 'Ungroup' button to ungroup the filter criterion **(Figure 5)**.

c. Insert Group: Click on the '**Insert Group**' button to insert a group and then add the filters to it.

d. Edit: Select the filter criteria and click on the '**Edit**' button to make changes in the criteria.

e. Delete: Select the criteria to delete it.

f. Move Up: Select the criteria and click on the '**Move Up**' to position it above the other criterion.

g. Move Down: Select the criteria and click on the '**Move Down**' to position it below the other criterion.Repeat the above steps for more filters.

Select the columns to be displayed on the report by going into the '**Define Display Columns**' tab and 'Define Personalization Columns' tab **(Figure 5)** and dragging the fields into the section.the column heading can be entered, grouping can be defined, sort level and the aggregation can be specified.

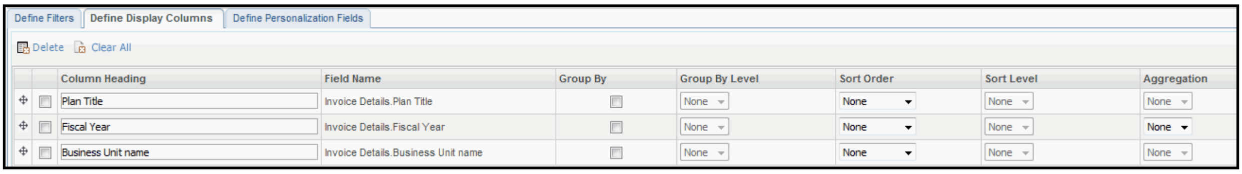


Figure No.5

Select the fields that the end user can personalize on by going into the '**Define Personalization Fields**' tab **(Figure 6)** and dragging the fields into the section.

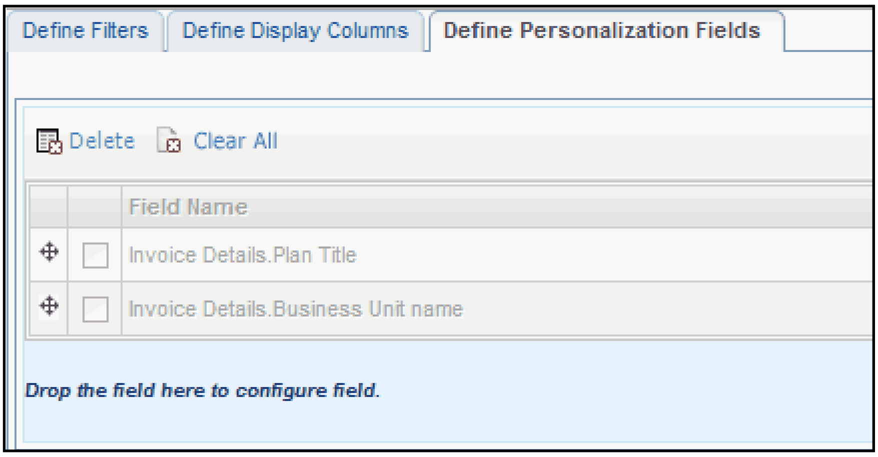


Figure No.6

Once the filters, display columns and personalization fields are specified the report can be generated. Save the report.

2. **Schedule** – The report can be scheduled by going into the '**Schedule**' tab **(Figure 6)**. Click on the '**Add Schedule**' button.

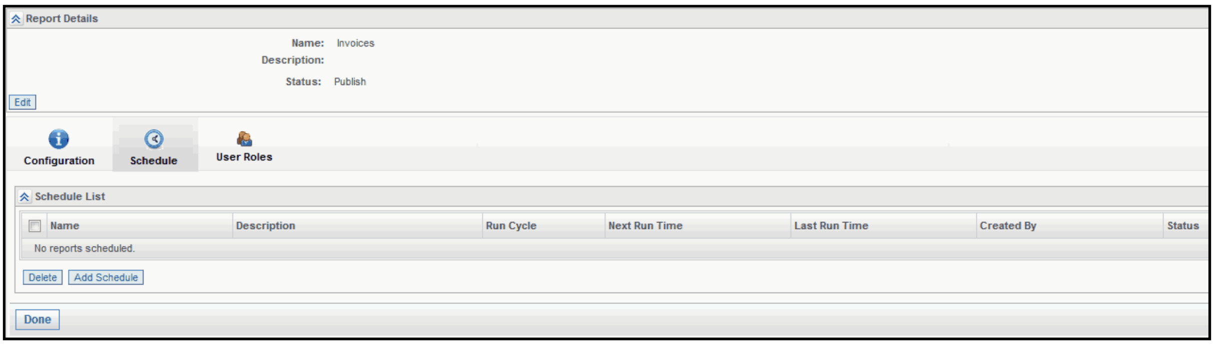


Figure No.7

A create schedule popup is displayed. The details for scheduling the report such as schedule type, start date and time to send the report. Enter receivers email Id's.

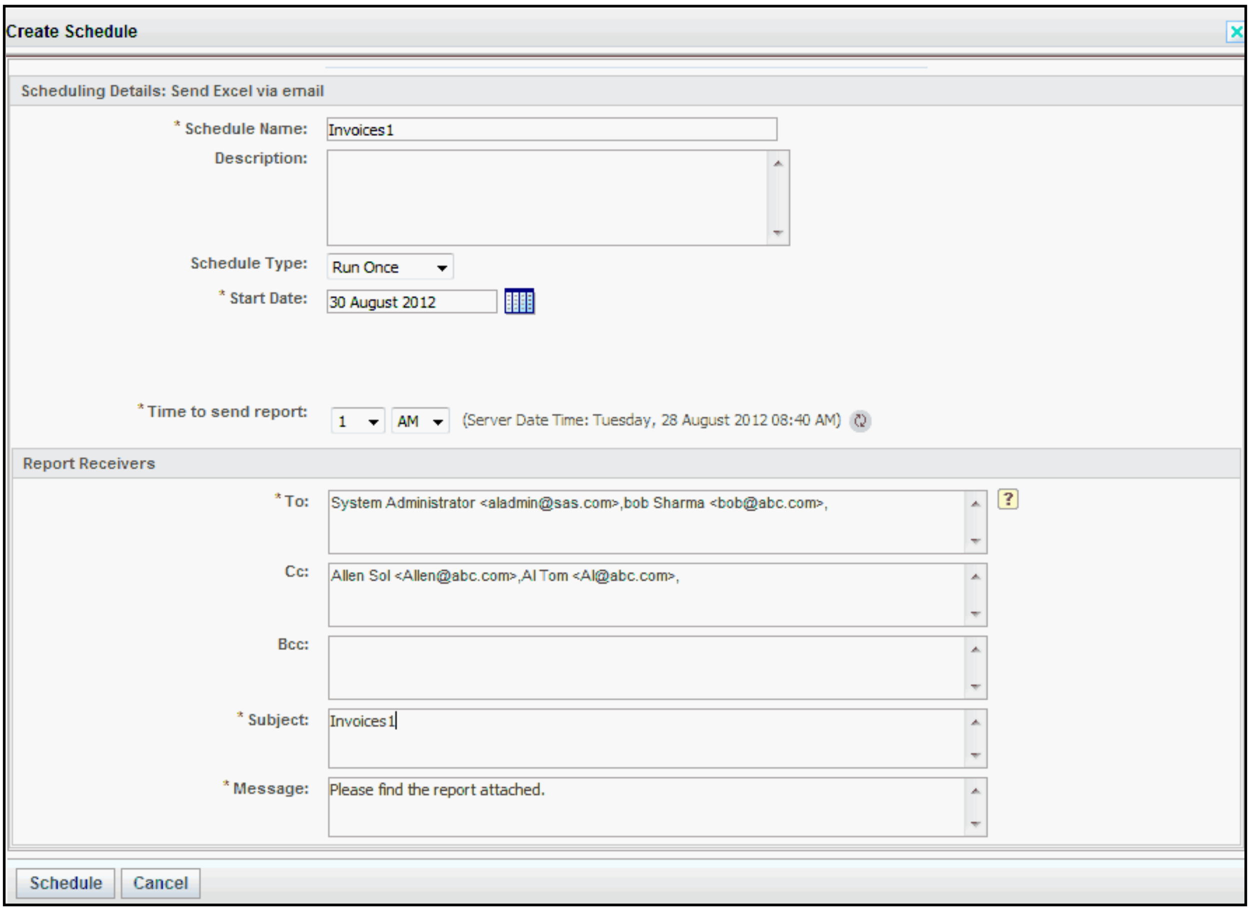


Figure No.8

After the report is scheduled the report will be sent to the concerned individuals.

3. **User Roles** – The authors and readers (users and groups) for the report can be added. These users/groups will have access to the report. The authors can edit/modify the report details and the reader can only view the report.

These Ad hoc reports can be exported to excel or HTML.

Scheduling a Report

The following reports can be scheduled:

1. In Strategic Planner – The Overspent Report, Activity Budgets and Spends Reports.
2. In Marketing Workbench – The Project Details report

The scheduling details can then be entered by the user **(Figure 1)**. The following details need to be provided for scheduling the report:

- **Report name**: By default the report name is displayed. The user can change it.
- **Description**: User defined.
- **Schedule Type**: Select 'Run Once' or 'Run Between'.
- **Start Date**: If the run once option is selected then only the start date needs to be provided, if the run between option is selected then the start and the end date needs to be provided.
- **Run Cycle**: The following run cycle can be selected –

Run Cycle	
Option	**Explanation**
Daily	If the option selected is daily then the user can select if the report should be generated on weekdays only or on all days.
Weekly	If the option selected is weekly then the user can select any day in the week on which the report should be generated.
Fortnightly	If the option selected is fortnightly then a note is displayed saying that the report will be sent in 15 day interval starting from the start date specified.
Monthly	If the option selected is monthly then the day, whether the report needs to be generated on the first or last day (any day in the week) and which months the report should be generated should be specified.
Quarterly	If the option selected is quarterly then a note is displayed saying that the report will be sent on the first day of every quarter based on the fiscal month setting.
Yearly	If the option selected is yearly then the user should select the month and the day of the month the report should be generated.

- **Time to send report**: The time for sending the report to the specified users.
- **Report Receivers**: The report can be sent as an email attachment to a set of users. The email addresses should be separated by a comma.
- **Option**: The delivery option is email by default and the report format can be specified as PDF or Excel.

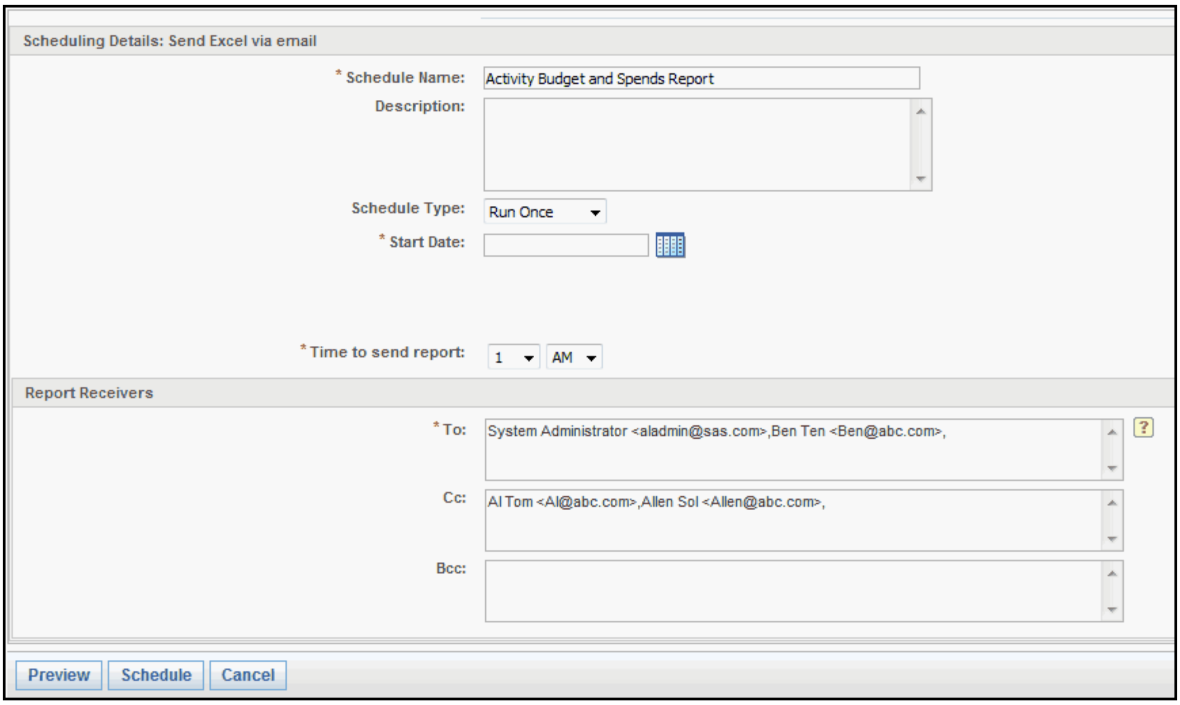

Scheduling Details: Send Excel via email
* Schedule Name:
Activity Budget and Spends Report
Description:
Schedule Type:
Run Once
* Start Date:
* Time to send report:
1
AM
Report Receivers
* To:
System Administrator <aladmin@sas.com>,Ben Ten <Ben@abc.com>,
Cc:
Al Tom <Al@abc.com>,Allen Sol <Allen@abc.com>,
Bcc:
Preview
Schedule
Cancel

Figure No.1