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SAS[®] Marketing Operations Management 6.0 R14 Update 1 What's New Document

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SAS® Marketing Operations Management 6.0 R14 Update 1: What's New Document

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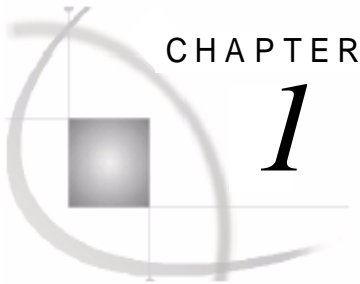
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CHAPTER

1

Features Document for 6.0 R14 Update 01

1	Features Document for 6.0 R14 Update 01	1
1.1	Internationalization and Localization (pre-production)	2
1.1.1	What's in scope for this release	2
1.1.2	What's not in scope for this release	4
1.2	Performance & Stability	6
1.2.1	Improved response time for on-screen calendar display and export to PDF	6
1.2.2	Dashboard service performance changes	6
1.2.3	Achieving Stability in High Load, High Concurrency Environment	7
1.2.4	Database Recommendation for ODS	7
1.3	Strategic Planner	8
1.3.1	Flexible Periods for Budget Forecasting	8
1.3.2	Resource Category Forecasts	13
1.4	Offer Management	14
1.4.1	Editing Locked Offers	14
1.4.2	Auto lock offers on defined date	14
1.5	Digital Asset Management	17
1.5.1	Additional Support for 'Not Equal to' Operator in Advanced Search	17
1.5.2	Include Asset Description in Excel batch cataloging tool	17
1.6	Ad-Hoc Reports	17
1.6.1	Show Named Hierarchy Values in Ad-hoc Report Filters	17
1.6.2	More data available for Ad-hoc reporting	18
1.6.3	Display of Last Updated Date on Ad-hoc Reports	19
1.7	Calendars	19
1.7.1	Showing Events on all Calendars	19
1.8	Resource Management	21
1.8.1	Navigation and Nomenclature Changes	21
1.9	Marketing Workbench	22
1.9.1	Assets in DAM linked to Workbench objects	22
1.10	Integration	22
1.10.1	MOM-Marketing Automation integration enhancements	22
1.11	Timesheets	24
1.11.1	Usability enhancement	24
1.12	Integration of SAS MOM and SAS SDM	25
1.12.1	Setup and Configuration for the integration in SAS MOM	28

1.1 Internationalization and Localization (pre-production)

R14 Update 1 provides a significant set of functionality to deliver internationalization support. This provides the foundation to enable the product to be adapted to various languages and regions so companies can implement a version of MOM in a language other than English. The internationalization support in this release can be characterized as being at a pre-production level, as additional functionality for production-level support will be delivered in a subsequent release.

In addition to the initial internationalization functionality, R14 Update 1 also provides localized Japanese and German versions. Japanese version has been labeled as production level based on the linguistic support present. German version is labeled as a pre-production level. We expect to add support for other languages in subsequent releases.

For R14 Update 1, MOM supports a single language per instance or tenant. This means that all users within a MOM instance will access the application in the same language. The language selection is configured during the tenant creation.

The screenshot shows the 'Tenant Creation' window. On the right side, the 'Default Language' dropdown is expanded, showing a list of languages: English (US), English (US), German, and Japanese. A red dashed rectangle highlights this dropdown menu. The 'Save' button is located at the bottom center of the window.

1.1.1 What's in scope for this release

The following is an overview of functionality that will appear in a localized language in this release:

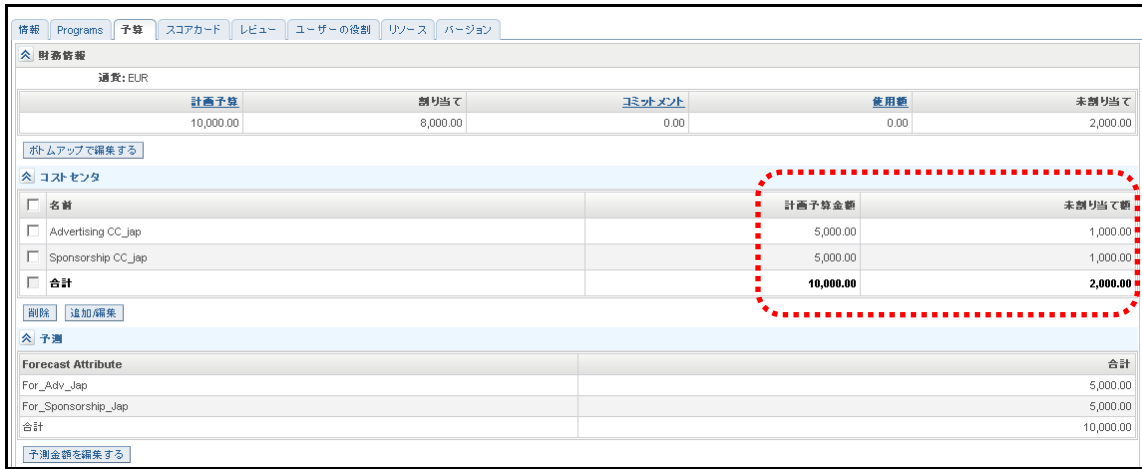
- Login page
- Navigation pane items, list labels, and button names

The screenshot shows the application interface. On the left is a sidebar with navigation items: 戦略プランナ, プラン, 子集, レビュー, 一括変更, リソースのリクエスト, and a section for プラン. The main content area has a search bar and a table of plans. The table has columns: タイトル, ビジネスユニット, ステータス, 会計年度, and 計画予算. The table contains one row: Test Plan 1, testbu1, 下書き, 2012, EUR 0.00. There are buttons for 削除, コピー, and 新規 at the bottom.

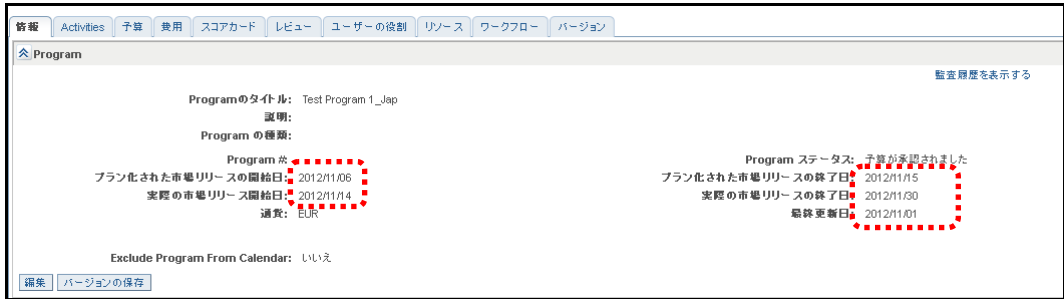
- Form labels



- Number formats based on selected language



- Date formats based on selected language



- Notifications
- Standard reports list – categories, names, and descriptions
- Status values for standard entities, such as Activity status

作成する Activity

Enterprise Marketing Business Unit_lap > Test Plan 1_Japan > Test Program 1_lap >

*Activityのタイトル: Test Activity 1

説明:

Activityの種類: 選択

Activity #:

プラン化された市場リリースの開始日:

実際の市場リリース開始日:

通貨: EUR

計画量:

注:

Exclude Activity From Calendar: ☐ はい ☒ いいえ

Activity ステータス: 下書き

プラン化された市場リリースの終了日:

実際の市場リリースの終了日:

- Standard reports – labels, date formats, number formats, and standard entity status values

1.1.2 What's not in scope for this release

The following is an overview of internationalization limitations in R14 Update 1:

- Operating System is English only
- Installation and configuration will be English only
- Full support for multiple languages within single instance/tenant not supported
- Database in English only – schema names (tables, fields, relationship names, etc.) must be in English

スキーマデザイナー

エンティティの種類を作成する

エンティティの種類の詳細

*エンティティタイプ名: MARKETINGACTIVITY

説明: Marketing activity is a plan or a series of plans of the information related to an activity such as product launch, ad campaign, event, etc. A plan may have multiple activities each with a different level of hierarchy. There is no pre-defined hierarchy.

属性の管理

名前	表示テキスト	データの種類	データサイズ	UIの種類	デフォルト値	必須	検索可能	名前付き階層	名前付き階層の値	表示順序
MARKETINGACTIVITYID	Marketing Activity ID	INTEGER	8	EDITBOX		TRUE	FALSE			1
ACTIVITYLEVEL	Marketing Activity Level	INTEGER	8	EDITBOX		TRUE	FALSE			1
ACTIVITYNUMBER	Marketing Activity Number	STRING	100	EDITBOX		FALSE	FALSE			3
ACTIVITYTYPE	Marketing Activity Type	STRING	2000	DROPDOWNLIST		FALSE	FALSE	MARKETINGACTIVITYTYPE	0	Value
ACTUALENDDATE	Marketing Activity Actual End Date	DATETIME	8	CALENDAR		FALSE	FALSE			5
ACTUALSTARTDATE	Marketing Activity Actual Start date	DATETIME	8	CALENDAR		FALSE	FALSE			6

- Audit reports will contain some statements in English only

グループ別のログイン

Generated by: System Administrator (Admin) on 2012年 11月 02日 (金) 午前 02:22

グループ名: Administrators		
アクティビティ名	アクティビティの説明	アクティビティの実行日
SIGNIN	User admin Logged in to system	02-11-2012 2:17:04 午前
SIGNIN	User admin Logged in to system	02-11-2012 1:22:25 午前
SIGNOUT	User Logged out off system	02-11-2012 1:22:18 午前
SIGNIN	User admin Logged in to system	01-11-2012 9:06:21 午前
SIGNIN	User admin Logged in to system	01-11-2012 3:41:10 午前
SIGNOUT	User Logged out off system	01-11-2012 3:10:14 午前
SIGNIN	User admin Logged in to system	01-11-2012 1:56:07 午前
SIGNIN	User admin Logged in to system	01-11-2012 1:34:36 午前
SIGNOUT	User Logged out off system	01-11-2012 1:32:07 午前
SIGNIN	User admin Logged in to system	01-11-2012 1:26:38 午前
SIGNOUT	User Logged out off system	01-11-2012 1:14:27 午前
SIGNIN	User admin Logged in to system	01-11-2012 12:46:55 午前

- Schema display text in English only – used in calendars, dashboards, and ad hoc reports

カレンダーの詳細

*名前: Marketing Plan
説明: The Marketing Plan Calendar channel displays marketing activities to the user.

許可されたキャッシュ: いいえ
キャッシュの有効期限の範囲: 5分

カレンダーグループ: システムカレンダー
カレンダーのステータス: パブリッシュ
パーソナライズ: はい

ターゲットエンティティの選択

ターゲットエンティティ: Marketing Activity Marketing Activity 選択

基準ビルダー

ターゲットエンティティ、関連エンティティ、関連ファセットから、フィールドを下の領域にドラッグします。

Marketing Activity

- Marketing Activity ID
- Marketing Activity Level
- Marketing Activity Number
- Marketing Activity Type
- Marketing Activity Actual End Date
- Marketing Activity Actual Start date
- Budget Approved Flag
- Marketing Activity Currency Type
- Marketing Activity Description

Related Entities

- Marketing Activity KPI
- Marketing Activity Measurement
- Marketing Activity Offers
- Activity Selection Lists
- Activity Touch Points
- BUDGETAPPROVER
- Budget Initiator
- Budget Manager
- Commitments in Marketing Activity

Related Facets

- Marketing Activity Default Metrics
- ACTIVITY_RESCAT_FORECAST
- MARKETINGACTIVITY_ALLOCATION
- MARKETINGACTIVITY_ATSBREAKUP
- Marketing Activity Budget Allocation
- Marketing Activity Distribution Channels
- Marketing Activity DM Activity Details
- Marketing Activity DM Activity Information
- MARKETINGACTIVITY_EXCLUSION

フィルタの定義

AND グループ

- Marketing Activity Coordinator.USERID 次の値に等しい ログインユーザー
- Marketing Activity Reader.USERID 次の値に等しい ログインユーザー
- Marketing Activity Creator.USERID 次の値に等しい ログインユーザー
- Marketing Activity Owner.USERID 次の値に等しい ログインユーザー

ターゲットエンティティ 関連するエンティティ 関連するファセット

保存 キャンセル

- Dashboard administration – dashboard names & description, page names & description, and predefined channel names & descriptions in English only

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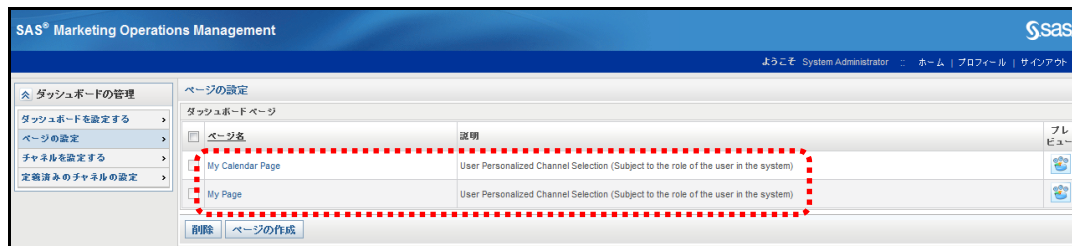
ようこそ System Administrator ホーム | プロフィール | サインアウト

ダッシュボードの管理

ダッシュボードの設定

ダッシュボード名	説明	プレビュー
SAS MOM Calendar Dashboard	SAS MOM Calendar Dashboard	
SAS MOM Dashboard	SAS MOM Dashboard	

削除 ダッシュボードを作成する



- Error logs in English only
- System errors in English only

1.2 Performance & Stability

R14 Update 1 builds upon the performance improvements in R14 by further improving application response times. The specific improvements are as follows:

1.2.1 Improved response time for on-screen calendar display and export to PDF

Code changes related to the performance for Gantt View's display have been completed. The new code changes are now using single class to generate the hierarchy and Calendar bars. This has reduced the processing time for displaying individual item in left and right panes.

The Gantt chart calendar shows items expanded by default to 3rd level. An 'Expand All' button allows you to expand the complete hierarchy.

Calendar Performance Tests					
Calendar names	Time Period	Time to Load			
		New Code		Old Code	
		SAS Machine	Customer Machine	Customer Machine	
<customer> Group AFS	1 month	0m 13s	0m 16s	0m 41s	Data volumes range for testing 1 month = 500 - 1500 activities 3 months = 1500 - 4000 activities
	3 month	0m 20s	0m 21s	2m 12s	
Consumer	1 month	1m 32s	1m 51s	> 15m	
	3 month	2m 33s	2m 41s	> 20m	Customer Machine Specs Browser IE 8.0.6001.18702 Flash Player 10.1.53.64
Banking Group	1 month	0m 31s	0m 39s	2m 30s	
	3 month	0m 56s	1m 13s	> 10m	
Bank of <x>	1 month	0m 13s	0m 18s	0m 36s	SAS Machine Specs Browser IE 8.0.6001.18702 Flash Player 11.3.300.265
	3 month	0m 20s	0m 23s	1m 30s	
Business	1 month	0m 6s	0m 06s	0m 25s	
	3 month	0m 8s	0m 09s	0m 49s	
<x> Consumer	1 month	0m 32s	0m 33s	> 5m	
	3 month	0m 50s	0m 51s	> 10m	

For PDF generation from the Calendar, with the help of a new PNG encoder (PNGEncoder2) for bitmap to PNG conversion, a PDF report is generated within 48 Seconds which was taking 05 Min 40 Sec previously.

There is a limit on the number of activities that may be exported to PDF. The limit is 1500 activities. Exporting a PDF for more than 1500 activities from Gantt view gives a message of limitation on number of activities which can be exported.

1.2.2 Dashboard service performance changes

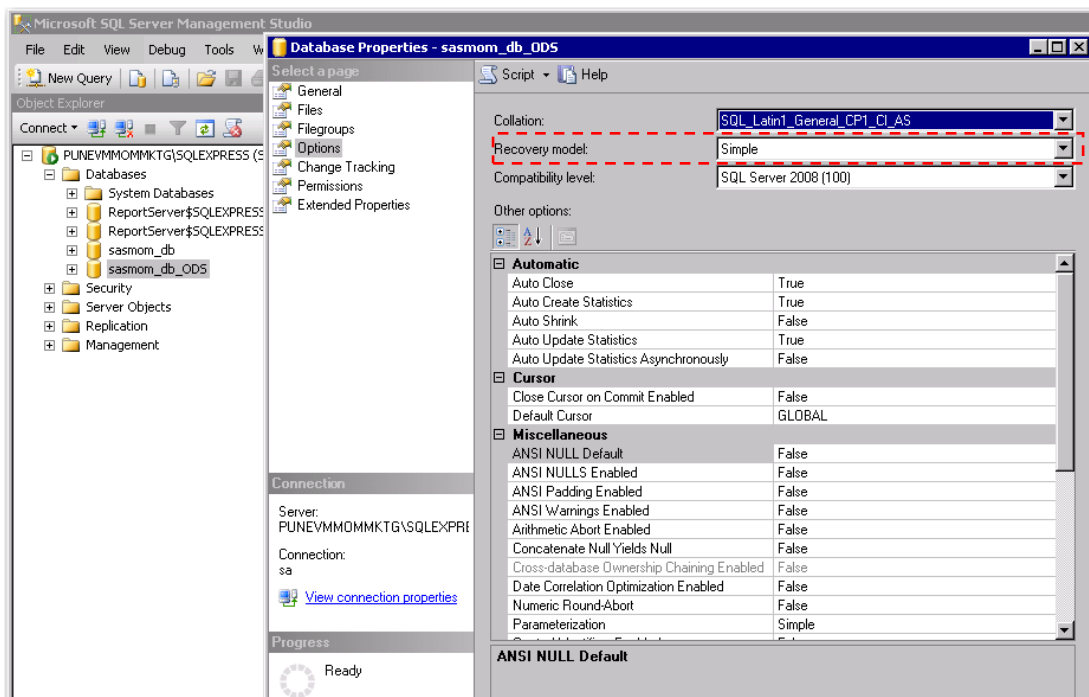
The Dashboard display service which used to take about 40 seconds for 1000 records while generating hierarchy, now takes approximately 3 seconds.

1.2.3 Achieving Stability in High Load, High Concurrency Environment

1. Restructuring database access code to reduce the time required for transactions – This change drastically reduced number of deadlock exceptions logged during in a 50 user load runner test with no think time.
2. Use of in-memory XML modifications to manage concurrent access of files.
3. Improvements of XML file operation transactions.
4. Refined transaction management - Includes selective use of Distributed Transaction Coordinator and a database setting for transaction isolation for reducing deadlocks
5. Optimized use of Memory when fetching large amount of data – Memory usage for fetching 100 MB data was brought down from 2.2 GB to 200 MB
6. Parameterization of all queries in MOM to maximize reuse of cached query plans
7. Reduction in database hits for looking up object metadata by ensuring all lookups happen from cache
8. Optimized handling of Cataloger jobs in Queue Manager service– Resource consumption brought down from 1.5 GB to 50 MB
9. Optimized Session management by caching the session data and reducing frequency of database updates for session refresh
10. Elimination of frequent loading of tenant XML by performing the lookup from cached copy
11. Optimization of time required to add attributes to facets – Time taken to update facet was reduced from minutes in double digits to few seconds
12. Minimization of session creation by Windows services – Text Cataloger service
13. Reduction of time taken to display Perform List screen when the list is large
14. Optimization of stored procedure for Plan User Access report
15. Reduction of Memory consumption for ad-hoc reports transactions

1.2.4 Database Recommendation for ODS

Database recovery model to be set as “Simple” mode rather than “Full” mode to minimize the growth of ODS log files in the ODS database.



Budget Forecast for Immediate Child
(Marketing Activity at any level Program/Campaign/Activity/Channel/Tactic)

Forecast

Planned Amount : 3,000,000.00

None Add

Forecast

Forecast Attribute	P1	P2	P3	P4
Advertising	250000.00	50000.00	50000.00	50000.00
Brand	50000.00	50000.00	50000.00	50000.00
Sponsorship	50000.00	50000.00	50000.00	50000.00
Total	350000.00	150000.00	150000.00	150000.00

Delete Save Forecast

P13	Total	Budget Caps
50000.00	650000.00	1,300,000.00
50000.00	650000.00	1,300,000.00
50000.00	650000.00	1,300,000.00
150000.00	1950000.00	

Message from webpage

The available forecast amount for Advertising for duration Period 1 is 100,000.00.

OK

- Existing standard reports in Planner that display a quarterly view of data have been modified to comply with quarterly definitions for configured periods in the Forecast Admin user interface. In addition, all quarterly reports display the quarter definitions with associated periods and dates for reference.

The following standard SAS MOM reports display data according to defined quarters:

1. Activity Budgets and Spend
2. Activity Actuals
3. Financial Account Spend
4. Recovery Sheet
5. Activity Summary
6. Forecast Variance

Report: Activity Budget and Spends Report

Paper Size: Tabloid

Selected Filters:

Business Unit : None
Fiscal Year : 2010
Planned In-Market Start Date : From None To None
Planned In-Market End Date : From None To None
Cost Center : None
Activity Type : None
Group By : Cost Center
Report Type : Quarterly

Page 1 of 1

Activity Title	Activity #	Allocated to Spend	Committed	Q1	Q2	Q3
Cost Center : 1234 - Adv Cost center						
Plan-FY2010-YQP>>Program for New Product Development Launch-1033	1033	0.00	210000.00	0.00	0.00	0.00
Totals for Cost Center - 1234 - Adv Cost center :		0.00	210,000.00	0.00	0.00	0.00
Cost Center : 2345 - Spons cost center						
Plan-FY2010-YQP>>Program for New Product Development Launch-1033	1033	0.00	210000.00	0.00	0.00	0.00
Totals for Cost Center - 2345 - Spons cost center :		0.00	210,000.00	0.00	0.00	0.00
Quarter Definitions:						
Q1 (P01,P02,P03,P04)	26 February 2010 to 16 June 2010					
Q2 (P05,P06,P07)	17 June 2010 to 08 September 2010					
Q3 (P08,P09,P10)	09 September 2010 to 01 December 2010					
Q4 (P11,P12,P13)	02 December 2010 to 25 February 2011					

Generated by: System Administrator (Admin) on Monday, 10 December 2012 04:26:19 PM

Calculations are based on the quarter definitions configured in Forecast Admin. Legend also displays on report screen.

- A new embedded ad-hoc report for Forecast Variance by period has been added to the left navigation pane in Strategic Planner. This report will only be accessible for customers using period-wise forecasting functionality.

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Strategic Planner

Plans

Budgets

Reviews

Bulk Changes

Resource Request

Plans

View Plans

View Activities

View Estimates

View Commitments

View Invoices

Select Currency

Clone User

Replace User

Reports

Marketing Calendar

Forecast Variance - Quarterly

Forecast Variance - Periodwise

Activity Actuals - Monthly

Activity Actuals - Quarterly

Activity Budget Report

Activity Summary - Monthly

Activity Summary - Quarterly

View Plan

Business Unit 1 > 2012 Marketing Plan A

Info Programs Budgets Scorecard Reviews User Roles Resources Versions

Search

Status: None

Program Type: Select

Program #:

Program Title:

Search

Programs

Program Title	Program Type	Program #	Status
2012 Program 1 - Advertising	Advertising		Budget Approved

Delete Add

sas

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Name: Forecast Variance - Periodwise for Plan

Description: This report shows periodwise Forecast Variance for the plan.

Generated On: 05 March 2013 08:53 PM

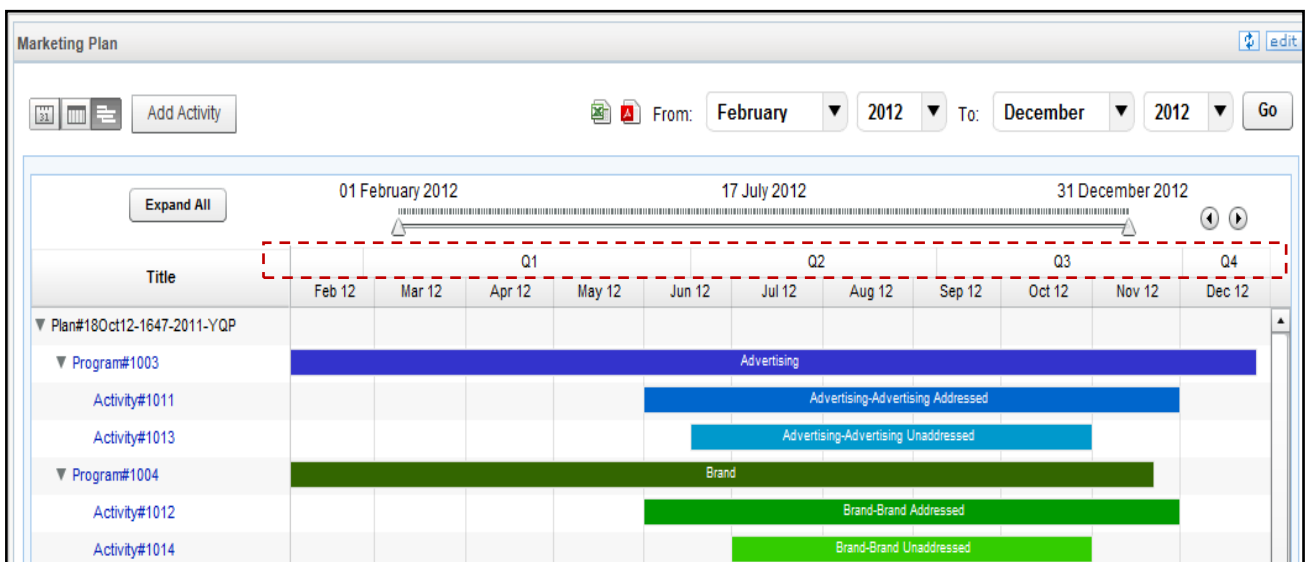
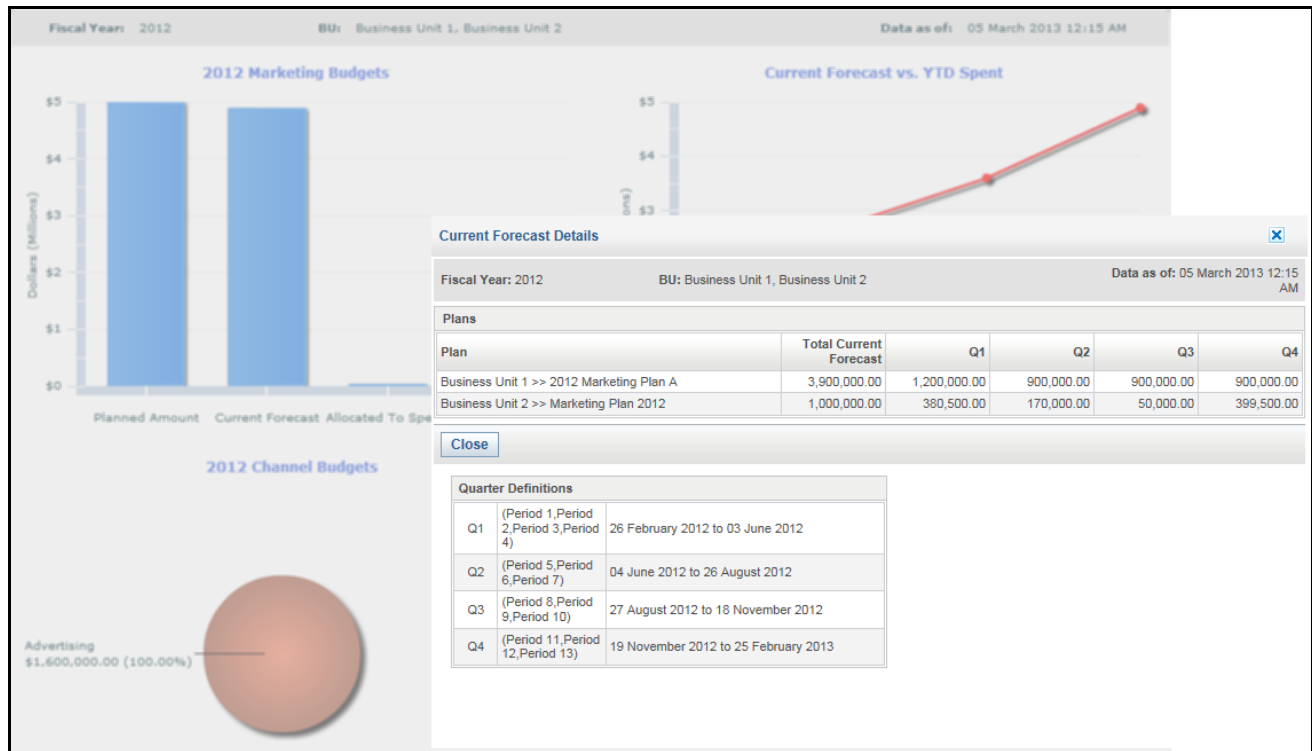
Last Updated On: 05 March 2013 12:16 AM

Generated by: System Administrator

View Levels: Level 1

Grouped By	Budgeted Amount	Forecast Amount For Period 1	Actual Amount For Period 1	Forecast Amount For Period 2	Actual Amount For Period 2	Forecast Amount For Period 3	Actual Amount For Period 3
2012 Marketing Plan A	4,000,000.00	300,000.00	0.00	300,000.00	0.00	300,000.00	0.00
2012 Program 1 - Advertising	1,600,000.00	100,000.00	0.00	100,000.00	0.00	100,000.00	0.00

- Dashboards and Calendar Gantt Views that present a quarterly view of data now display data according to the period and quarter definitions configured in the Forecast Admin user interface. Quarter definitions also are displayed when users drill into data on applicable dashboards.



- Scorecards now have the ability to display measurement time slots according to a period-wise configuration.

Edit Measurement
India BU > Plan for New Product Launch > Scorecard- Measurement01

Measurement

* Name: Scorecard- Measurement01
Description:

Measurement Type: MT1

* Start Date: 01 February 2012 * End Date: 28 February 2013

Frequency: Periodwise
Calculation Type: Cumulative

Expected Time Slots			Actual Time Slots		
Time Slot Start Date	Time Slot End Date	Expected Values	Time Slot Start Date	Time Slot End Date	Actual Values
01 February 2012	25 February 2012		No actual time slots configured.		
26 February 2012	24 March 2012				
25 March 2012	21 April 2012				
22 April 2012	19 May 2012				
20 May 2012	16 June 2012				
17 June 2012	14 July 2012				
15 July 2012	11 August 2012				
12 August 2012	08 September 2012				
09 September 2012	06 October 2012				
07 October 2012	03 November 2012				
04 November 2012	01 December 2012				
02 December 2012	29 December 2012				
30 December 2012	26 January 2013				
27 January 2013	25 February 2013				
26 February 2013	28 February 2013				

Populate Expected Time Slots Add Actual Time Slot

Save Cancel

Here the Expected Time Slots are based on configured periods for the selected duration (Start & End Dates) if the Frequency for Measurement is Period-wise.

1.3.2 Resource Category Forecasts

The MOM R14 release introduced functionality for viewing Resource Category Forecasts and rollups for plans and activities directly in Strategic Planner. R14 Update 1 adds the following enhancements to the Resource Category Forecasts in Planner functionality:

- The 'Copy Plan' capability allows you to easily create a new plan based on an existing plan. When you copy a plan, you now have the option to copy Resource Category Forecast data in addition to other plan information.

Copy Plans

Title: Copy of 2012 Marketing Plan A Business Unit: Business Unit 1 Fiscal Year: 2012 Currency: USD Copy Options: Copy All Levels

Done

Select More Options

Plan Level

- ☒ Attachments
- ☒ Cost Centers
- ☒ Forecasts
- ☒ Scorecard
- ☒ User Roles/Groups

Marketing Activity

- ☒ Planned In-Market Start/End Date
- ☒ Actual In-Market Start/End Date
- ☒ Attachments
- ☒ Cost Centers
- ☒ Forecasts
- ☒ Resource Category Forecast
- ☒ Scorecard
- ☒ User Roles
- ☒ Attachments
- ☒ Estimates

Done

- When you create saved versions of plans and activities, the saved versions will now include Resource Category Forecast and rollup data.

1.4 Offer Management

1.4.1 Editing Locked Offers

Many marketing organizations need to be able to create and track a large number of offers used in various promotions. The Offer Management module in MOM enables marketing organizations to efficiently manage all marketing offers in a central, searchable repository. The offers can be stored with all relevant details and published via Offer Calendars to ensure broad visibility to all relevant stakeholders within the organization.

Within the Offer Management module, Offer Managers can “lock” offers to prevent further changes to an offer after creation. This gives Offer Managers sufficient control to ensure that no unwanted changes are made to offers prior to or during the in-market dates. Prior to this release, locking an offer prevented any edits by any users. R14 Update 1 enhances the locking capabilities by providing the flexibility to configure the system to allow Offer Managers to edit locked offers. This capability applies to users specifically assigned to an Offer Manager group in the Admin user interface. To do so follow the instructions below:

1. Go to the ‘Offer Management Admin’ via the left pane of the Dashboard screen.
2. On the Settings screen of the Offer Management admin click on the ‘Edit’ button on the extreme right corner of the screen. The settings can then be edited.
3. Select ‘Yes’ for the ‘Allow Offer Manager to Edit Locked Offers’ setting.

The screenshot displays the 'Offer Management Admin' interface. On the left, a sidebar contains 'Settings' and 'Offer Type Color Configuration'. The main area is titled 'Edit Settings'. Under 'Offer Settings', the following options are visible:

- Allow auto generation of Offer Code: Yes
- Allow Change Management: Yes
- Configure Offer Types: [Click here to configure](#)
- Enable Auto Lock Date: Yes
- Allow Offer Manager to Edit Locked Offers: Yes** (highlighted with a red dashed box)

Below the 'Offer Settings' section is the 'Access Control' section, which includes:

- Offer Manager Group Access: Yes

At the bottom, there is a table for 'Offer Manager Groups' with one entry: 'Offer Managers Group'. Below the table are 'Delete' and 'Add Group' buttons.

1.4.2 Auto lock offers on defined date

As described above, the Offer Management module enables offers to be locked to prevent unwanted changes prior to or during in-market dates. Prior to this release, offers could only be locked manually by selecting one or more offers and clicking the ‘Lock’ button. R14 Update 1 enhances the locking functionality by enabling administrators to configure the setting of an auto lock date based on the ‘Offer Valid From’ date. For example, as a best practice, a company may choose to auto lock offers two weeks before the date the offer goes live in the market.

Offer Management Admin

Settings

Offer Type Color Configuration

Edit Settings

Offer Settings

Allow auto generation of Offer Code: Yes

Allow Change Management: Yes

Configure Offer Types: Click here to configure

Enable Auto Lock Date: Yes

Allow Offer Manager to Edit Locked Offers: Yes

Access Control

Offer Manager Group Access: Yes

Offer Manager Groups

Offer Managers Group

Delete Add Group

The default date for the auto lock is set to 10 days prior to the ‘Valid From’ date. To configure this follow the steps below:

1. Go to the ‘UI Framework’ on the left pane under Configuration of the Dashboard screen. A new window with the solution list will be displayed.
2. Click on the ‘Campaign Manager’ link to see the form list.

Form Configuration			
Form List			
Form Name	Display Text		Edit
TreatmentForm	Treatment Details		
FRM_CampaignSummary	Campaign Summary		
FRM_CampaignCreate	Create Campaign		
FRM_CampaignInfo	Campaign Info		
FRM_ExtractTemplateDetails	Summary		
FRM_ExtractTemplateFaceDetails	Delivery Method		
FRM_TreatmentsPreview	Treatment Preview		
FRM_OffersPreview	Offer Preview		
FRM_CampaignSchedule	Campaign Schedule		
FRM_OfferSummary	Offer Summary		
FRM_OfferCreate	Create Offer		
Widget Form list			
Form Name	Display Text		Edit
Form does not exist.			

3. Click on the ‘FRM_OfferCreate’ link.
4. The form details are displayed. Click on the pencil icon next to the ‘Auto Lock Offer On’ field to view the field details.

Label: Auto Lock on

Content Type: DateTime

UI Type: Calendar

Date Mode: Date

Date Dependency: [Configure](#) [Remove](#)

Valid From MINUS 10 Day(s)

Configure Date Dependency

Field Name: Auto Lock on

Depends On: Valid From

Operation: Decrement by 10 Days 0 Months 0 Years

Consider Non Working Days: ☒

[Save](#) [Cancel](#)

Define Condition: No conditions defined. [Configure](#)

Configure Web Service: No web service configured. [Configure](#)

(Configure and Remove actions will permanently save the changes on the form.)

Column no.: 1

Help Header:

Help Content:

Instruction:

☒ Label Properties

[OK](#) [Cancel](#)

- On the 'Add Field' screen the date dependency can be configured by clicking on the 'Configure' button. A 'Configure Date Dependency' popup is displayed. Edit the 'Operation' field to suit your requirements.

If the above feature is switched on then an end user can enter the 'Auto Lock Offer On' date while creating or modifying the offer. The default date is what is set by the admin (See above). This can be edited. The offer gets locked on this date automatically. Only the Offer Manager can edit the offer after it is locked.

Marketing Offers > 2013 Offers > New Offer

Offer Details

* Offer Name: 10% off for New Customers

Description: This is an offer for new customers to avail card membership free of charge.

Offer Code: 1008

Valid From: 12 March 2013

Valid Until: 31 March 2013

Auto Lock Offer On: 2 March 2013 [Clear](#)

Offer Type: New customer Offers

Status: Draft

Locked: No

Supporting Documents: No Files attached. [Upload](#)

[Save & Continue](#) [Cancel](#)

1.5 Digital Asset Management

1.5.1 Additional Support for ‘Not Equal to’ Operator in Advanced Search

The Digital Asset Management (DAM) module has advanced search capabilities to enable users to quickly find assets based on search parameters. The advanced search option allows users to define filter expressions by selecting attributes, operators (such as contains, equal to), and values. R14 Update 1 enhances the advanced search capabilities by adding support for the ‘Not equal to’ operator for multi-select fields. Consider the following example to illustrate a use case for this functionality.

A company has defined a metadata field called ‘Approved brands’ to select the approved brands that can use a digital asset. Because multiple brands can be approved for an asset, ‘Approved brands’ is set up as a multi-select field. An end-user then would like to get a list of assets approved for all brands except brand 2. The user constructs a filter for ‘Approved brands NOT EQUAL TO brand 2’.

The screenshot shows the 'Advanced Search' window with a 'Search Filter List' tab. It contains a table with four columns: Source, Attribute, Operator, and Attribute Value. The first row is populated with 'DIGITALASSET_TAGTAXONOMY' as the Source, 'Approved Brands' as the Attribute, 'Not equal to' as the Operator, and 'Brand 2' as the Attribute Value. Below the table are buttons for 'Delete', 'Add Filter', 'Search', and 'Save Query'.

Source	Attribute	Operator	Attribute Value
<input type="checkbox"/> DIGITALASSET_TAGTAXONOMY	Approved Brands	Not equal to	Brand 2
<input type="checkbox"/> --Select--	--Select--	--Select--	
<input type="checkbox"/> --Select--	--Select--	--Select--	

Buttons: Delete, Add Filter, Search, Save Query

1.5.2 Include Asset Description in Excel batch cataloging tool

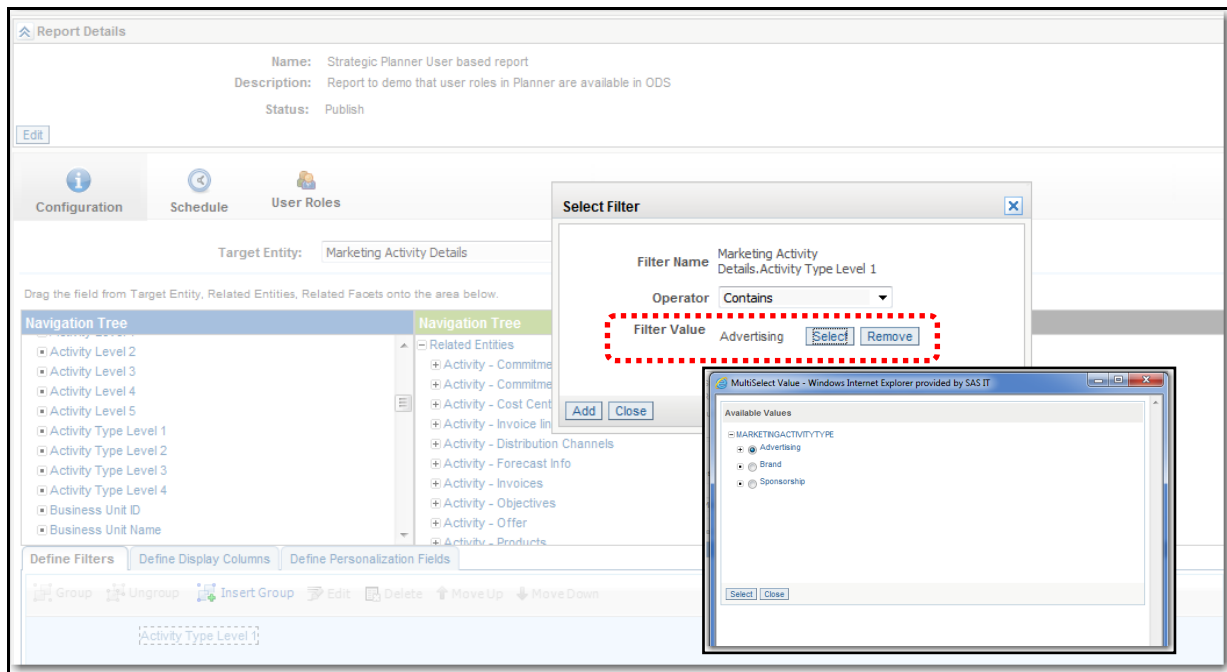
To enable efficient cataloging of multiple assets, the DAM module includes functionality to upload multiple files en masse via an Excel batch cataloging tool. The Excel sheet enables users to catalog assets along with associated metadata. The Excel sheet is enhanced in R14 Update 1 by adding support for the asset description field.

Note: This enhancement only applies to the Windows macro – without dialog (excel sheet for batch cataloging).

1.6 Ad-Hoc Reports

1.6.1 Show Named Hierarchy Values in Ad-hoc Report Filters

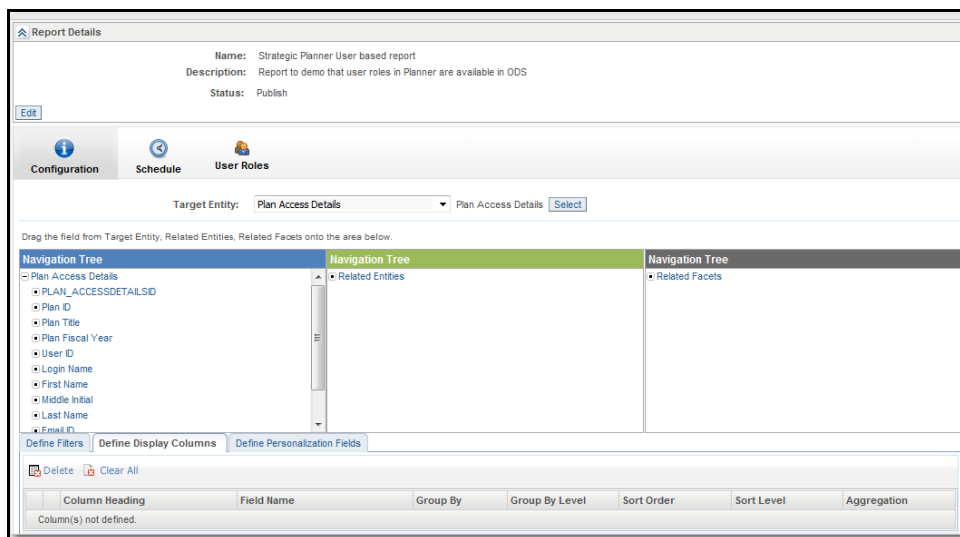
When creating ad-hoc reports, users can define filters to customize the data included in the report. R14 Update 1 enhances the filter user experience by displaying the values available for selection for fields with named hierarchy values. For example, you might want to create a report showing all activities of type ‘Advertising’. When you define the filter, the user interface for selecting filter values displays all available activity types so you can easily select ‘Advertising’.



1.6.2 More data available for Ad-hoc reporting

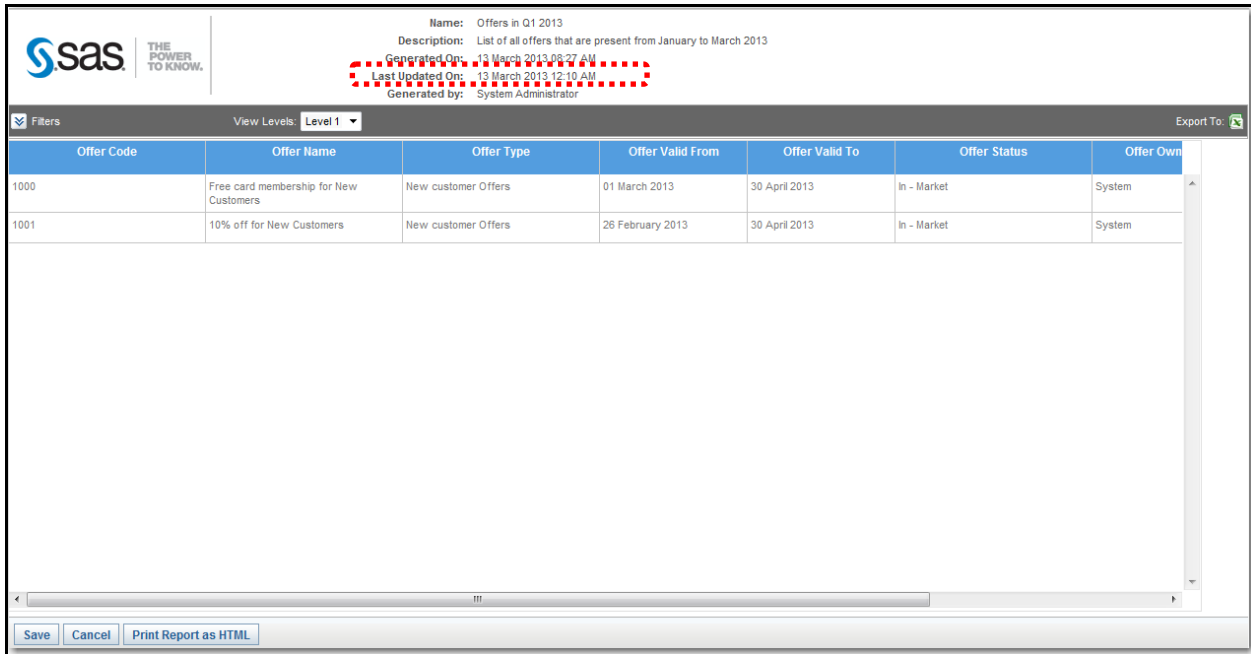
The Ad-hoc reporting tool pulls data from an Operational Data Store (ODS) that is specifically designed for ease of reporting. In the past few releases, the ODS has been enhanced to include more information from the MOM database, and we expect to continue to make more data available in the ODS in subsequent releases. The goal is to enable users to create valuable reports against the broad set of data in MOM. R14 Update 1 continues to enhance the ODS by adding support for the following data:

- Offers from the Offer Management module. Users can now create reports on offers and associated metadata.
- User role data from Strategic Planner is included in two new target entities for ODS - Plan Access Details and Marketing Activity Access Details. With these additions, you can easily pull out a list of users and their roles for plans and activities in Strategic Planner. This enables reporting capabilities such as 'List of Activities owned by user X' or 'List of Activities that include user X as reader'.



1.6.3 Display of Last Updated Date on Ad-hoc Reports

The Ad-hoc reporting tool pulls data from an Operational Data Store (ODS). This ODS database is scheduled to be updated with data from the MOM database at a frequency of once a day. The date and time of last update of data is now reflected while creating and viewing an Ad-hoc report on the screen.



Name: Offers in Q1 2013
Description: List of all offers that are present from January to March 2013
Generated On: 13 March 2013 08:27 AM
Last Updated On: 13 March 2013 12:10 AM
Generated by: System Administrator

Offer Code	Offer Name	Offer Type	Offer Valid From	Offer Valid To	Offer Status	Offer Own
1000	Free card membership for New Customers	New customer Offers	01 March 2013	30 April 2013	In - Market	System
1001	10% off for New Customers	New customer Offers	26 February 2013	30 April 2013	In - Market	System

Buttons: Save, Cancel, Print Report as HTML

1.7 Calendars

1.7.1 Showing Events on all Calendars

Users can create and track marketing events directly from the Events Calendar. Events are a separate entity from marketing activities in Strategic Planner. Users can create and track events without using Strategic Planner. R14 Update 1 provides an enhancement to extend the visibility of events throughout the organization by providing a configuration capability to display events on all calendars in MOM. On any calendar click on the 'edit' button on the extreme right corner, a channel personalization popup is displayed. To include events on the calendar, select 'Yes' for the 'Show Events' option.

2013 Offers

March 2013

Channel Personalization

Channel Details

Name: 2013 Offers
Description: The Offers Calendar channel displays all offers available in the system.
Channel Type: Calendar

Channel Personalization

Offer Type:

☐ Discount Offers ☐ Loyalty Offers
☐ New customer Offers ☐ Upsell Offers

Show Holidays: Yes
Show Events: Yes
Display Mode: Show Start to End Date Bar
Show all items for a day: Yes

Save Cancel Reset

Legend

Discount Offers Loyalty Offers New customer Offers Upsell Offers Default Color Holiday

Calendar view showing offers for March 2013. The calendar displays offers for each day, including:

- Own a TV and get a Blu-ray player at 50% off
- .10% off for New Customers
- .20% off on all purchases exceeding \$200
- Extra Loyalty points
- Free card membership for New Customers
- New Offer for demo

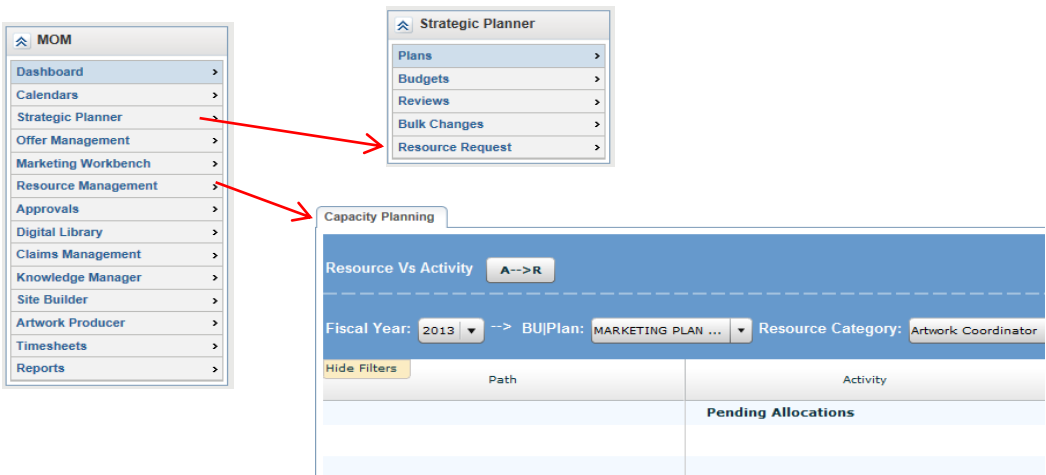
Big Event 1 is scheduled for March 18th.

1.8 Resource Management

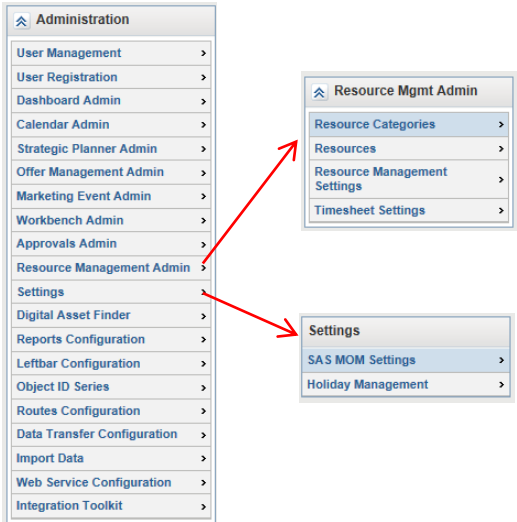
1.8.1 Navigation and Nomenclature Changes

In preparation for some planned future enhancements, R14 Update 1 has the following navigation and nomenclature changes in Resource Management:

- The ‘Resource Planner’ left navigation pane menu item has been renamed to ‘Resource Management’
- The ‘Resource Allocation’ functionality has been renamed to ‘Capacity Planning’



- The access point for ‘Resource Request’ has been moved from the ‘Resource Planner’ left navigation menu item to the ‘Strategic Planner’ left navigation menu item.
- The ‘Resource Management’ left navigation menu item under ‘Tools’ has been removed. That functionality is now accessible under the ‘Resource Management Admin’ and ‘Settings’ left navigation menu items in the Administration section.



1.9 Marketing Workbench

1.9.1 Assets in DAM linked to Workbench objects

Many MOM customers catalog assets in DAM as part of an asset creation process managed in Workbench. For example, at the end of a review process an asset for a deliverable in Workbench might be catalogued in DAM, so it is accessible from the digital library. Based on customer feedback, R14 Update 1 modifies the behavior of assets in DAM linked to Workbench items when the Workbench items are deleted. The specific changes address the following use cases:

- A Deliverable Manager catalogs an asset for a deliverable in DAM and subsequently the deliverable is deleted. R14 Update 1 modifies the behavior for this use case such that if a deliverable is deleted, the assets are still accessible in DAM.
- A Deliverable Manager catalogs an asset for a deliverable and then the asset is transferred to a task in the deliverable. The task contributor adds metadata for the asset and these updates are reflected in DAM. The task is then deleted in Workbench. R14 Update 1 addresses this use case by adding a configuration option to prevent an asset from being deleted in DAM if a task is deleted per the use case described above.

1.10 Integration

1.10.1 MOM-Marketing Automation integration enhancements

The integration between SAS Marketing Operations Managements and SAS Marketing Automation (MA) enables users in MOM to perform functions such as creating campaigns in CI Studio directly within the MOM user interface. The out-of-the-box functionality provides integration between Marketing Workbench and SAS Customer Intelligence Studio Selection Campaigns (part of SAS Marketing Automation). The goal is to help Marketing Services and Campaign Designer teams work together more efficiently in the campaign creation process.

The integration is enabled by web services along with pre-configured Marketing Workbench workflows to support a range of campaign creation options for MOM users. The integration setup utility will create a Marketing Workbench project with three deliverables and associated tasks.

R14 Update 1 builds upon the integration capabilities in prior releases by enabling MOM users to do more aspects of the campaign creation process. Specifically, this release extends the campaign creation capabilities for MOM users to include diagram drawing components. The chart below summarizes the new capabilities in R14 Update 1, as reflected in the two new pre-configured deliverables: 'Create Campaign' and 'Create Campaign and Initiate Counts'.

<i>Available with R14</i>	<i>Available with R14 U1</i>	<i>Available with R14 U1</i>
Initiate Campaign Creates Campaign in MA <ul style="list-style-type: none"> • Brief • Custom Details • Scheduling Input • Send to Scheduler/Admin • Review • Approve 	Create Campaign Creates Campaign in MA <ul style="list-style-type: none"> • Brief • Custom Details • Scheduling Input • Send to Scheduler/Admin • Review • Approve <ul style="list-style-type: none"> • Add diagram drawing • Select inclusions/exclusion and one target list per Mkt • Add a communication • Complete drawing, make ready to count • Select Treatments assign to Marketing Cells 	Create Campaign and Initiate Counts Creates Campaign in MA <ul style="list-style-type: none"> • Brief • Custom Details • Scheduling Input • Send to Scheduler/Admin • Review • Approve <ul style="list-style-type: none"> • Add diagram drawing • Select inclusions/exclusion and one target list per Mkt • Add a communication • Complete drawing, make ready to count • Select Treatments assign to Marketing Cells <ul style="list-style-type: none"> • Trigger counts to run when creating campaign • Carry out entire process without involving Campaign Designer

View Task

Direct Marketing Project > Create Campaign and Initiate Counts Deliverable > Create Campaign and Initiate Counts Task

Info

Dependencies

User Roles

Project

Task

Task ID: 1000

Task Title: Create Campaign and Initiate Counts Task

Instructions: Create basic campaign in marketing automation system with pre defined targets and communication information, and initiate counts to run as part of creating the campaign

Start Date: 15 January 2013

Status: Completed

Actual End Date: 15 January 2013 01:22 PM

☐ Notify me if task is delayed

☒ View Project & Deliverable Info

Due Date: 15 January 2013

% Complete: (100%)

Campaign

Business Context Name: Q_BC_ORASmall

Folder Path: viswep

Campaign Name: 1-15-01

Campaign Code:

Publish Campaign Info: Yes

Campaign Definition: QS Direct Mail Campaign Definition

Campaign Description: Campaign description

Minimum Budget Amount: 1.00

Maximum Budget Amount: 10.00

Minimum Number of Offers: 2

Maximum Number of Offers: 20

Add Edit Permission Group: Marketing Integration

Add View Permission Group: Marketing Analyst

Campaign Custom Details:

Planned Start Date: 14 January 2014

Planned End Date: 22 January 2015

Response Start Date: 09 January 2014

Response End Date: 30 January 2015

Channel Required Date: 16 January 2013

Expected Campaign Cost: 2.00

Expected Campaign Revenue: 3.00

Expected Campaign ROI: 4.00

Campaign Strategy: Growth

Campaign Purpose: Campaign purpose

Target Audience Description: Target audience

BlankField_ca22:

Marketing Manager: Judy

Campaign Manager: Kim Blair

Campaign Reviewer: Alan

Supporting Division: Marketing

Legal Requirement: No

Hyperlink: camp hyperlink.com

Hyperlink Display Name: camp name hype inc

Campaign Scheduling

Provide instructions or directly set Campaign System dates:

Detailed Instructions: Detailed Instructions

Campaign System Settings:

Start Date: 08 January 2014

Type of occurrence: None

End After x No. of Recurrences: 1

Campaign Marketing Population

Inclusion Lists: Standard Lists\Inclusions\VIP

Exclusion Lists: Standard Lists\Exclusions\deceased

Communication

Communication Definition: Basic_UDFs_Autoedit

Communication Name: 1-15communication

Communication Code:

Unit Cost: 0.00

Communication Description: Communication Description

Minimum Budget: 2.00

Maximum Budget: 5.00

Minimum Offers: 1

Maximum Offers: 12

Communication Custom Details:

Planned Start Date: 14 January 2014

Planned End Date: 13 January 2015

Expected Cost: 2.00

Expected Revenue: 4.00

Expected Response: 6.00

Strategy: Growth

Hyperlink: Comthype.com

Hyperlink Display Name: hypeincname

Target List, Marketing Cell, and Treatments:

Number of rows selected: 0

<input type="checkbox"/> Marketing Cell Name	Marketing Cell Code	Target Lists	Treatments
<input type="checkbox"/> Marketing cell name		viswep\Links\Link Camp\Hour away	QS Treatments\Seasonal\Mother's Day sale

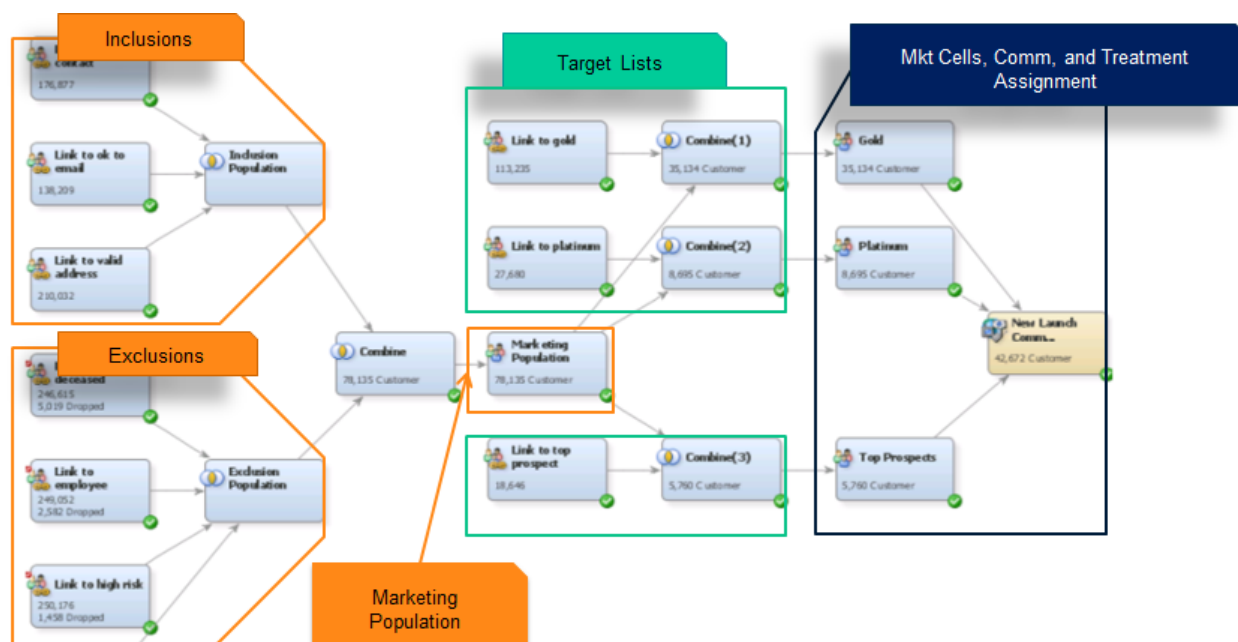
Export

Submit to Create Campaign and Initiate Counts

Submit Status Code: 1,001

Submit Status Text: Operation completed successfully. Counts are currently running.

Return Campaign Code: CAMP1662



1.11 Timesheets

1.11.1 Usability enhancement

Timesheets work with Resource Management functionality to provide visibility into actual time spent by resources on specific projects. The functionality enables resources to submit their daily hours of work against assigned projects. Based on customer feedback, the Timesheets user experience has been enhanced by merging the Project ID and Project title fields into one column. This enables easier project selection by allowing users to view both Project ID and Project Title in the project selection interface.

My Timesheets

Timesheet for 07 March 2013

Project ID - Project Title	Description	Hours
1000 - Direct Marketing Project		0.00
1002 - JK test initiate campaign 01		0.00
1003 - GT Direct Marketing Project		0.00
1004 - Direct Marketing Project feb		0.00
1005 - Direct Marketing Project fed 02		0.00
1006 - Direct Marketing Project_idtest1		0.00
OTHER		0.00
		0.00
		0.00
		0.00
		0.00

1.12 Integration of SAS MOM and SAS SDM

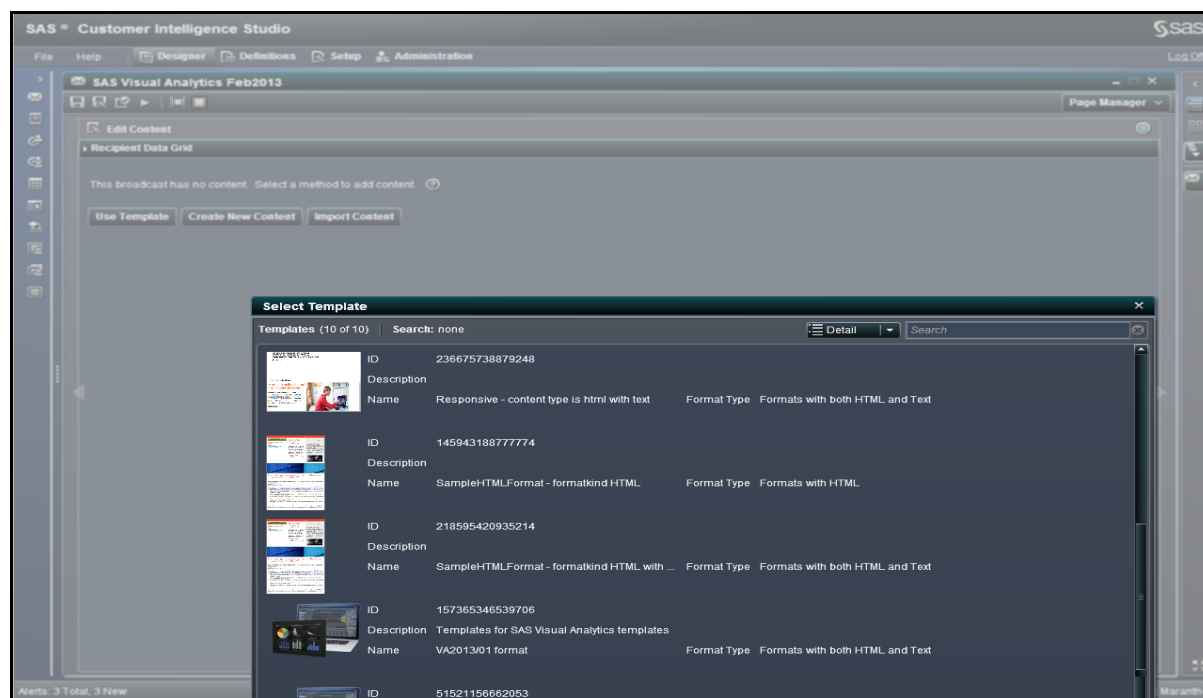
SAS Digital Marketing (SDM) Version 6.1 offers the e-mail marketer enhanced e-mail design capabilities with templates and digital asset management using SAS Marketing Operations Management (MOM) Version R14 Update 1. SAS MOM provides SDM with an e-mail template management and creation capability using MOM's Artwork Producer and Digital asset management via the DAM module.

What does this mean for SDM customers?

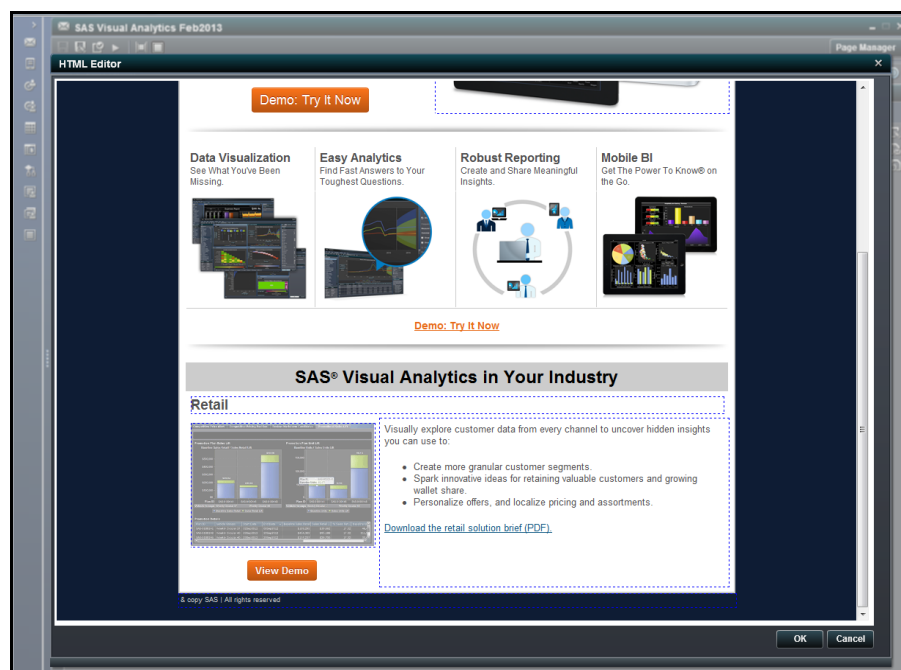
- Users will no longer need to separately install a 3rd party editor. A new HTML e-mail editor is included with the product. A marketer can create e-mail content starting from scratch using the new html editor.



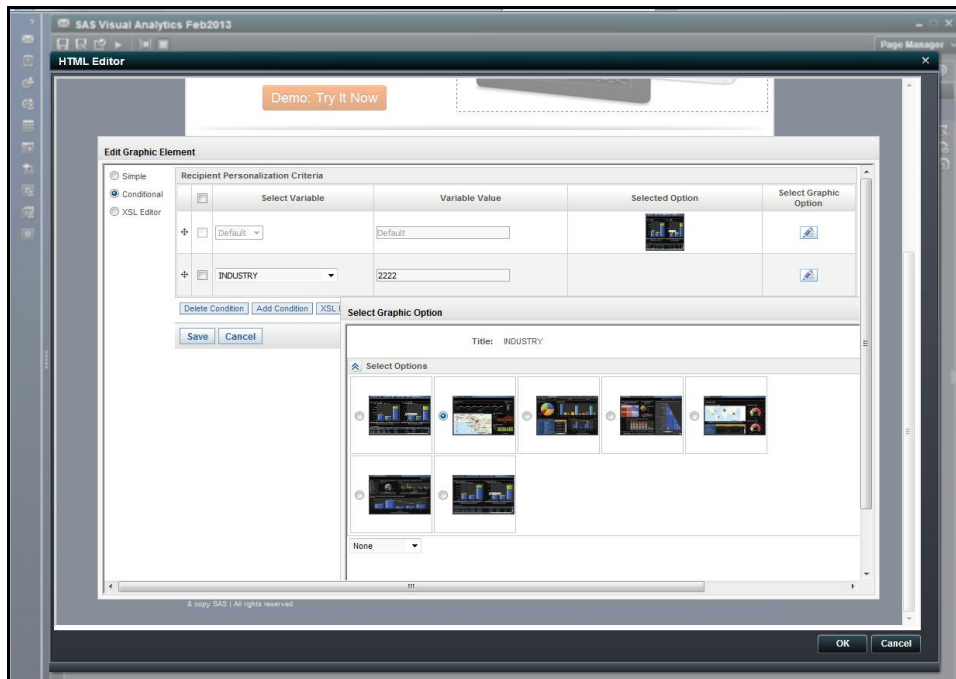
- The marketer also has an option to leverage capabilities of SAS MOM and select from pre-created e-mail templates coming from SAS MOM Format Designer in Artwork Producer. See below a list of templates within SDM coming from a published list from MOM Artwork Producer.



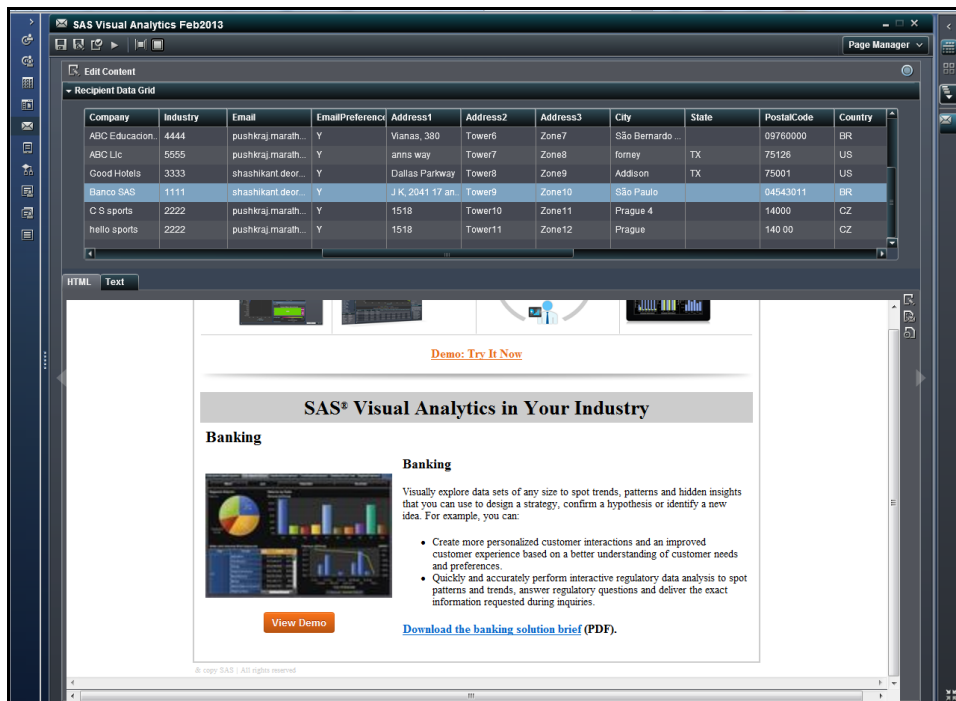
- The marketer also has an option to point and click and modify the text and graphical elements on the email template. This invokes the Artwork Producer point and click capabilities within SDM. See below the dotted lines indicating the replaceable graphical and text elements on the template.



- The marketer can specify conditions for personalization of the text and graphical elements on the email. The personalized content is retrieved based on taxonomy rules associated with the digital assets from the Digital Asset Manager (DAM) in SAS MOM.



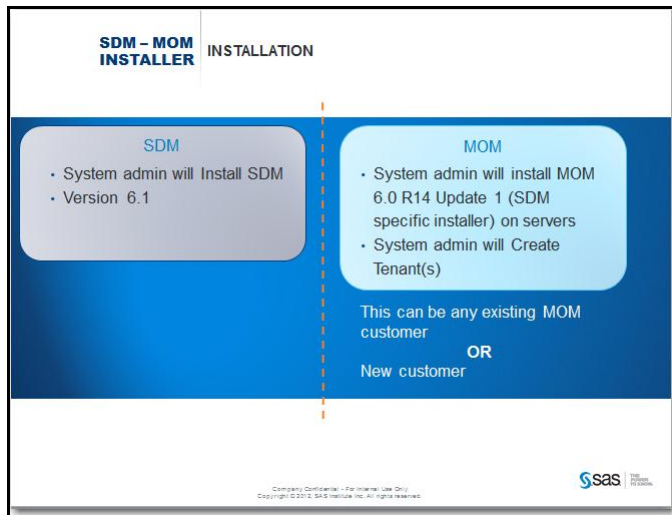
Here's a sample of a personalized email being sent to a preselected set of recipients:



For SAS employees: To read more details of the SAS SDM version 6.1, click here:
<http://smportal.sas.com/products/customer-intelligence/Pages/newin.aspx>

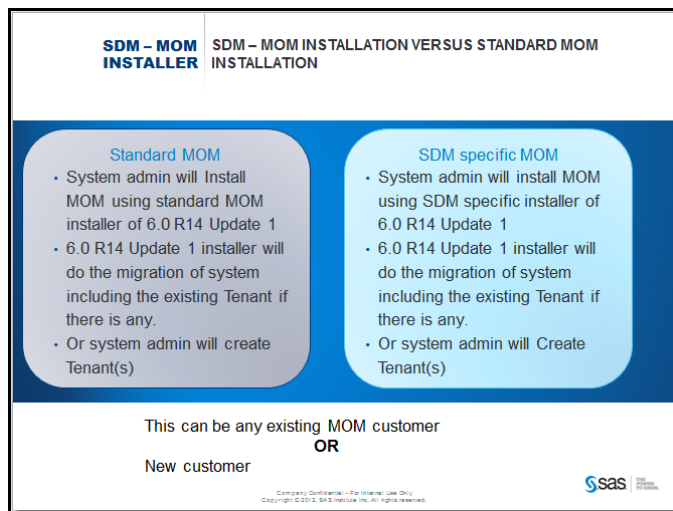
1.12.1 Setup and Configuration for the integration in SAS MOM

1.12.1.1 Installation of MOM and SDM

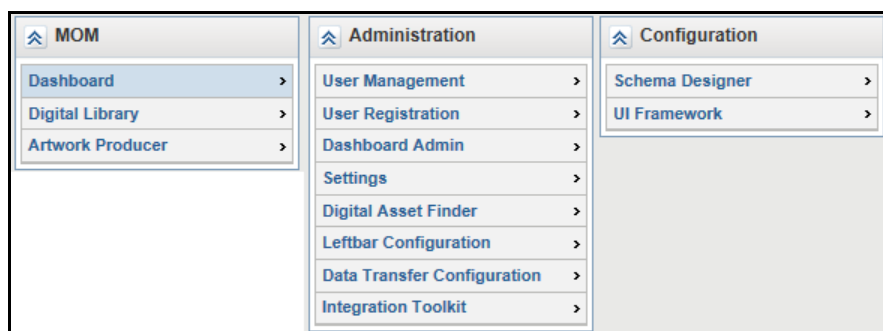


1.12.1.2 Choosing the correct MOM installer variation

There are 2 variations of the MOM installer starting version R14 Update 1 – one for the MOM customer who can enable SDM if required and one for the SDM Only customer. The SDM Only customer can on obtaining the necessary licenses upgrade to the full MOM version. See details later in this guide.

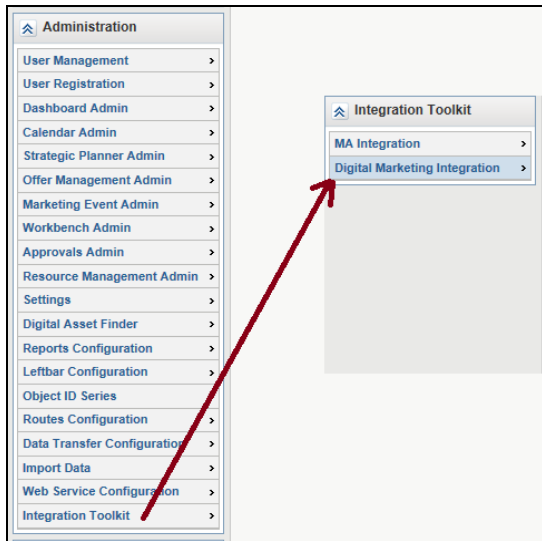


Following are the subset of MOM modules that are visible if the “SDM only” installation is run.



1.12.1.3 Running the Integration Toolkit from MOM

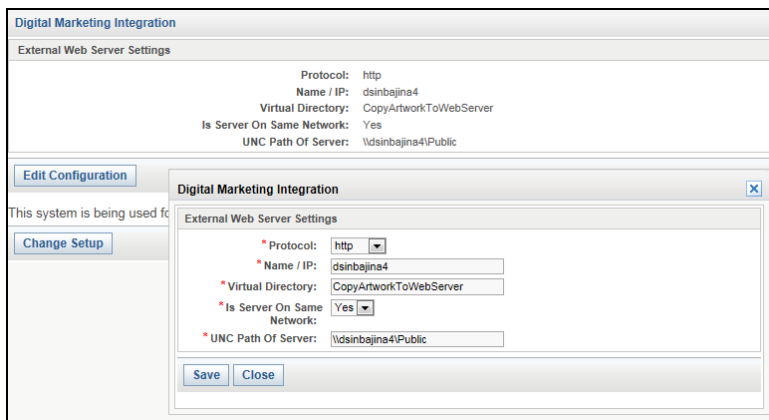
Any user with administrative rights can run the integration toolkit for Digital Marketing Integration. The toolkit can be run from the left task pane link within MOM > Administration pane.



This toolkit will make the following changes in the system:-

1.12.1.4 Setting the external webserver details in the configuration file:

When the Integration toolkit is executed for the first time, following settings are required:



External Web Server Settings:

These are the settings required to identify the web server in the integration setup that will hold the images that are included in the email. The images will be downloaded from this server when an email recipient opens an email sent via SDM or requests for downloading images in the email.

Protocol: - Choose from http or https. This is required for preparing the Image Path for the generated artwork, which is pushed on external web server when broadcast is executed / preview email is sent from Digital Marketing.

Name/IP: - Enter the Name/IP of external webserver where final artwork and images will get copied, when broadcast is executed / preview email is sent from Digital Marketing.

Virtual Directory: - Enter Virtual Directory location. This is required for preparing the Image Path for the generated artwork. Graphic element images included in the email broadcasts will be present under this virtual directory.

Is Server on Same Network: - Indicate if the web server machine is on the same network as the MOM installation or a different network.

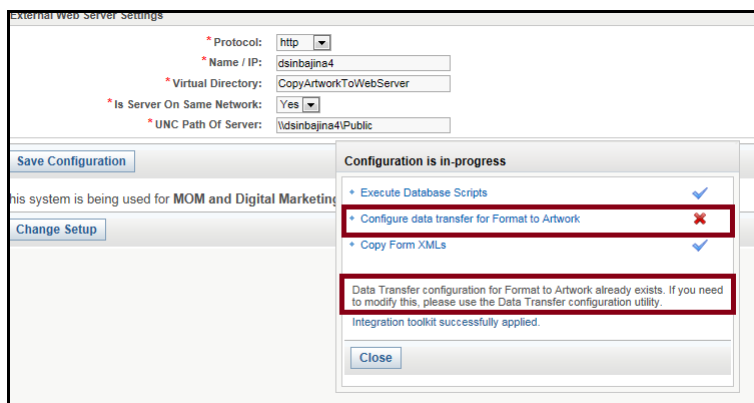
UNC Path of Server: - This will be needed only if the web server is on the same network as the MOM installation. Enter Target Path where the artwork and images will get copied.

NOTES:

- UNC path should be the same folder as the folder to which virtual directory is referring or pointing.
- If external webserver is not on same network, system will use one web service to transfer the files from MOM solution server to External web server for this to work. Copy the “**IntegrationMTOM**” folder located in MOM installer in “Folder - SDM integration” onto the external web server and then create a virtual directory “**IntegrationMTOM**” pointing to this copied folder.
- Above information can be updated even after utility is run. User can hit the ‘Edit Configuration’ to change the value for the external web server attributes.

When the above Settings are saved by clicking the “Save Configuration” button, the following changes occur automatically in the MOM system as required by the integration. Read relevant details in sections below:

- Database scripts required for installing the entities and facets are executed
- The data transfer configuration is set.
- The form XMLs are copied



1.12.1.5 Data transfer configuration changes for Artwork Format

When the data transfer configuration is set by the utility, here is what happens in the background. A new data transfer configuration (FORMAT_ARTWORK) is created to transfer the data from FORMAT to ARTWORK entity. Following script is run for this:-

```
INSERT INTO [ALENT_DATATRANSFERCONFIG]
(
  [DTCONFIGID]
, [DTCONFIGNAME]
, [DISPLAYTEXT]
, [SOURCEENTITY]
, [DESTINATIONENTITY]
, [SOURCEBUSINESSOBJECT]
, [DESTINATIONBUSINESSOBJECT] )
```


VALUES

```
(30227961240306,
  'Format_Artwork',
  'FORMAT_ARTWORK',
  'FORMAT',
  'ARTWORK',
  'Format',
  'Artwork')
```

INSERT INTO [ALOM_AUTHORIZATION]

```
( [AUTHORIZATIONID]
, [OBJECTID]
, [OBJECTTYPE]
, [ACCESSORID]
, [ACCESSRULECLAUSEID]
, [ACCESSORTYPE]
, [PRIVILEGENAME]
, [PRIVILEGEVALUE]
, [PARENTACCESSORID] )
```

VALUES

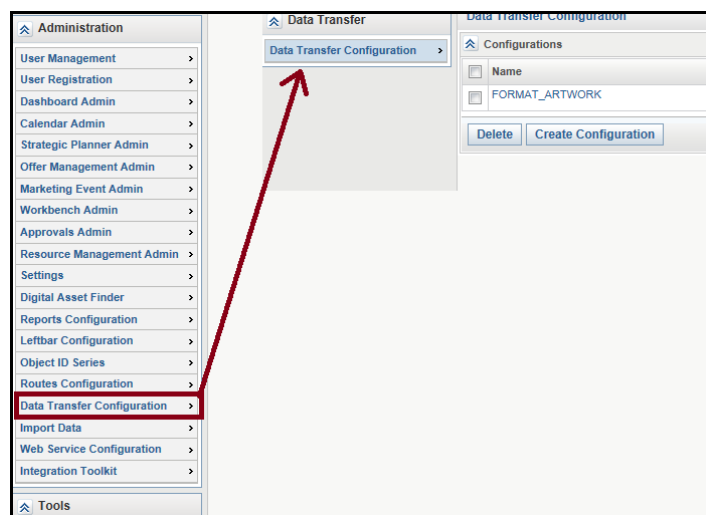
```
(139997925485867,
 30227961240306,
  'ENTITY',
  500,
  69240497087840,
  'EVERYONE',
  'DELETE',
  4,
  0)
```

Once the above records are inserted in database successfully, following xml file is copied under the xml mount point location.



CONFIGXML.xml

However if the data transfer configuration already exists with the same name, a warning message is shown to the user as seen in screen shot above. In this case, data transfer configuration needs to be modified manually as shown below:-



Add the following mapping between the format and artwork fields if they are missing: -

Field List	
Format Fields	Artwork Fields
<input type="checkbox"/> FORMAT - FORMATDESCRIPTION	<input type="checkbox"/> ARTWORK - ARTWORKDESCRIPTION
<input type="checkbox"/> FORMAT - FORMAT_FORMATINFO - TEXTCONTENT	<input type="checkbox"/> ARTWORK - ARTWORK_ARTWORKINFO - TEXTCONTENT
<input type="checkbox"/> FORMAT - FORMAT_FORMATINFO - ISTEXTCONTENTEDITABLE	<input type="checkbox"/> ARTWORK - ARTWORK_ARTWORKINFO - ISTEXTCONTENTEDITABLE
<input type="button" value="Delete"/> <input type="button" value="Add Format Fields"/> <input type="button" value="Add Format Group Fields"/> <input type="button" value="Add Facet Series Object"/> <input type="button" value="Add Reference"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

1.12.1.6 Format Details form changes for Artwork Producer with new Content Type fields

Here is how the format details form is updated with the fields related to the content type. Following new fields are added within Format Designer of Artwork Producer:-

- Content Type
- Text Content
- Allow Editing of Text Content

Edit HTML Format

Campaign > Design > New Html Format

Format Details

Format Title:New Html Format

Description:

Category:Digital Marketing

Additional Images:

headerLogo.png

Usage:

User Editable

Auto Generate

Content Type:Formats with both HTML and Text

Text Content:

This format is with HTML and Text

Allow Editing of Text Content:

Allow Editing of Text Content

1.12.1.7 New form added in Artwork Producer Form List

A new form is added to the artwork producer form list in the UI Framework. This form is related to the taxonomy page that appears before the point and click page.

Format_Events	Format_Events
Format_Stationery	Format_Stationery
Book_Details	Book Details
BookType_Details	Book Type Details
Integration_HTML_NonResizable_Artwork_Details	Artwork Details

1.12.1.8 Upgrading an “SDM only” customer to “MOM and SDM”

Click on the Change Setup button in the integration Toolkit section of MOM.

Administration

User Management

User Registration

Dashboard Admin

Calendar Admin

Strategic Planner Admin

Offer Management Admin

Marketing Event Admin

Workbench Admin

Approvals Admin

Resource Management Admin

Settings

Digital Asset Finder

Reports Configuration

Leftbar Configuration

Object ID Series

Routes Configuration

Data Transfer Configuration

Import Data

Web Service Configuration

Integration Toolkit

Integration Toolkit

MA Integration

Digital Marketing Integration

Digital Marketing Integration

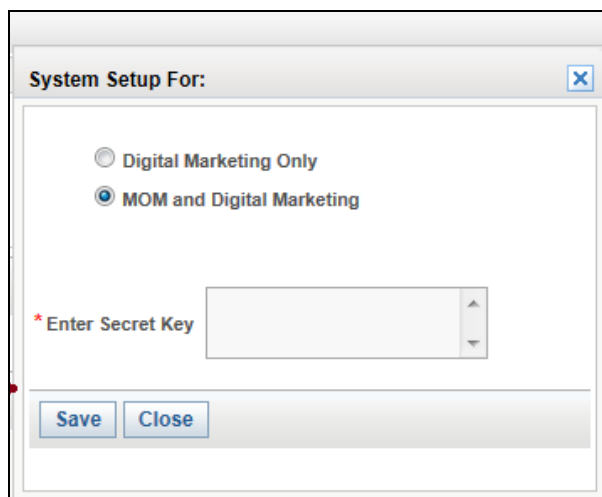
External Web Server Settings

Edit Configuration

This system is being used for

Change Setup

Using this, installation mode can be switched from ‘Digital Marketing Only’ to ‘MOM and Digital Marketing’.



The image shows a 'System Setup For:' dialog box. It has a title bar with a close button (X). Inside, there are two radio buttons: 'Digital Marketing Only' and 'MOM and Digital Marketing'. The 'MOM and Digital Marketing' option is selected. Below the radio buttons is a text input field with a red asterisk and the label '* Enter Secret Key'. At the bottom of the dialog are two buttons: 'Save' and 'Close'.

Switching from 'Digital Marketing Only' to 'MOM and Digital Marketing' needs a secret key to ensure that the customer has the necessary licenses to use full MOM as compared to the SDM only license held previously. On entering the Secret Key, an authentication is performed and then the necessary changes are effected to allow all of the MOM modules to be enabled and used.

NOTE: To secure a secret key, you will need to contact Technical Support – SAS SDM or SAS MOM.