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SAS[®] Marketing Operations Management 6.0 R14 Update 2 What's New

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SAS® Marketing Operations Management 6.0 R14 Update 4 What's New

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CHAPTER

1

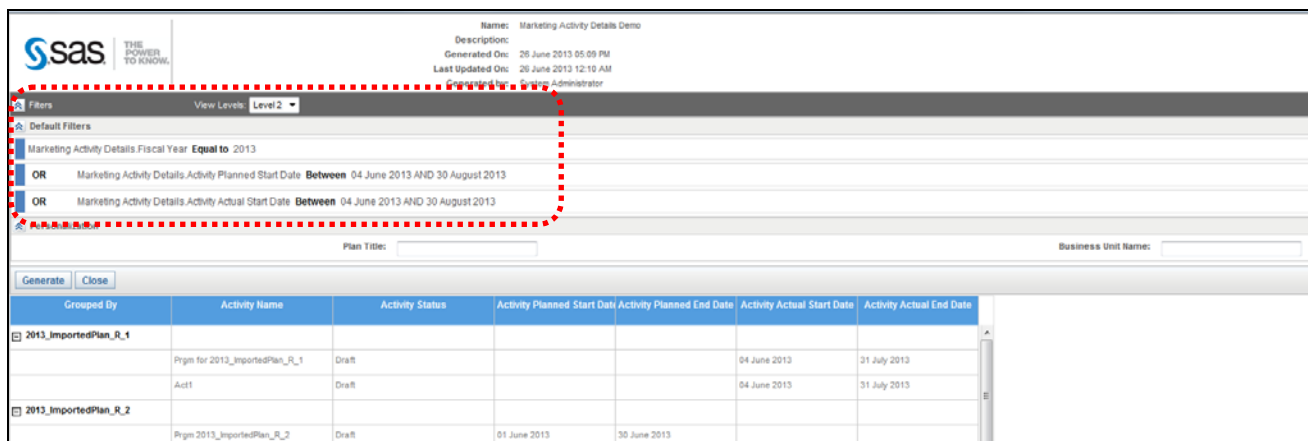
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1.1 Ad Hoc Reports

1.1.1 Show Default Filters in Ad Hoc Report Display

A user who creates ad hoc reports can define filters to customize the data included in the report. In R14 Update 2 the report viewing user experience is enhanced as the defined filters are displayed in a report preview and print view. This enables the users who generate the reports to view the filters used to limit the report data.



Grouped By	Activity Name	Activity Status	Activity Planned Start Date	Activity Planned End Date	Activity Actual Start Date	Activity Actual End Date
2013_ImportedPlan_R_1	Prgm for 2013_ImportedPlan_R_1	Draft			04 June 2013	31 July 2013
	Act1	Draft			04 June 2013	31 July 2013
2013_ImportedPlan_R_2	Prgm 2013_ImportedPlan_R_2	Draft	01 June 2013	30 June 2013		

1.2 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. The ODS has been enhanced to include more information from the Marketing Operations Management database, and more data will be available in the ODS in the subsequent releases. The goal is to enable users to create valuable reports against the broad set of data available in the system. In R14 Update 2 the ODS has been enhanced by adding support for the following data:

1.2.1 Resource Details and Daily Hours Totals in Timesheet Reports

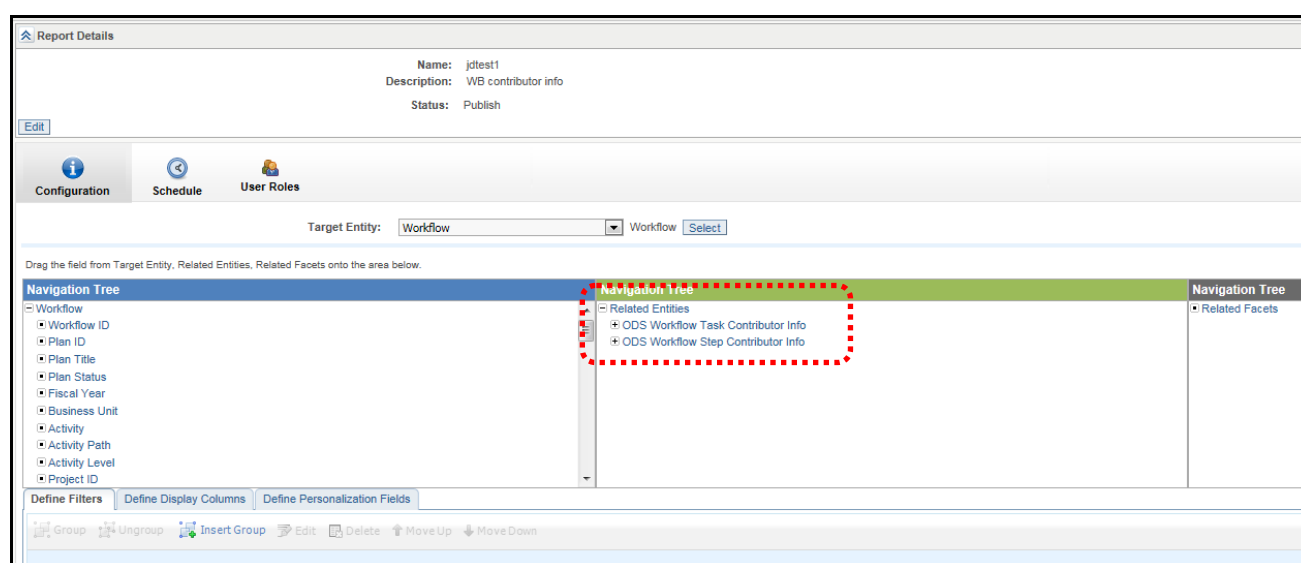
For users generating reports from the Timesheets, more information is now stored in the Operational Data Store for the Daily Timesheets.

The Timesheets entity in the Operational Data Store now includes Resource Details such as the Rate of the Resource, Country, Skill Level and whether the Resource is an External or Internal Resource.

Daily Total in number of hours entered by a Resource in the timesheet has been added to the Timesheet Entity in the Operational Data Store.

1.2.2 Contributor Information for Tasks Available for Workbench Reports

The WorkflowProcess (Marketing Workbench) entity in the Operational Data Store previously included contributor names per Step for the Workflow Process only. In this release the names of the Contributors can be seen at the Task levels as well to allow ease of reporting at the Task level of the Workflow Projects.



1.3 Approvals and Marketing Workbench

1.3.1 Media Annotations Tool for Image Files

The approvals module allows the admin users to select the tool for annotating PDF files:

1. SAS MOM (native) Annotations
2. Adobe Acrobat (offline)
3. Adobe Acrobat WebDAV mode

Prior to R14 Update 2, the PDF annotation tool selection impacted the annotation capabilities for image files as well as PDF files. Specifically, the SAS MOM Media Annotations Tool could be used to annotate image files if the PDF Annotations Tool selection was set to 'SAS MOM Annotations'. If the PDF Annotation Tool option was set to 'Adobe Acrobat' or 'Adobe Acrobat WebDAV', image files could be downloaded using a desktop tool for viewing the files.

R14 Update 2 enhances the annotation capabilities for image files by using the SAS MOM Media Annotations Tool for image files independent of the PDF annotation tool setting. This results in the following annotation capabilities based on the PDF Annotation Tool setting:

1. If SAS MOM annotations tool is selected – This tool will be used for annotating PDF and images. SAS MOM Video Annotations will be used for annotating video files.
2. If Adobe Acrobat (offline) is selected, then:
 - a. For PDF files – Download and annotate using Adobe Acrobat or Reader.
 - b. For Image files – Annotate using SAS MOM Media Annotations Tool.
 - c. For Video files – Annotate using SAS MOM Video Annotations Tool.
3. If Adobe Acrobat WebDAV mode is selected, then:
 - a. For PDF files – Annotate online using Adobe Acrobat in WebDAV mode.
 - b. For Image files – Annotate using SAS MOM Media Annotations Tool.
 - c. For Video files – Annotate using SAS MOM Video Annotations Tool.

The screenshot shows the 'Approval Settings' window. The 'PDF Annotation Tool' dropdown menu is set to 'Adobe Acrobat' and is highlighted with a red dashed box. Below it, the 'Action on file conversion failure:' dropdown is also set to 'Adobe Acrobat'. The 'Auto Login for Email:' dropdown is set to 'No'. The 'Solution Display Name:' field is empty.

1.3.2 Same Approver in Multiple Steps in Simultaneous Route

Approval jobs or tasks can be routed to a group of approvers using either a simultaneous (all approvers can review at any time) or sequential (approvers must review in a defined sequence) method. Due to regulatory considerations, sometimes the same individual needs to be explicitly listed as an approver in multiple steps in either routing methods. For example, an individual can have multiple roles in the review and approval process.

Prior to R14 Update 2, an approver could be listed in multiple steps only in a sequential route. R14 Update 2 enhances the capabilities for simultaneous reviews by allowing an approver to be listed in multiple steps in an approval job or task.

4 SAS® Marketing Operations Management: Features Document v.6.0 R14 Update 2

Edit Task
Promotions Test 5 > Promotions Deliverable > Approve Artwork

Task

Task ID: 1040
* Task Title: Approve Artwork
Instructions: This is a route process.
Start Date: 15 July 2013
Status: New
☐ Notify me if task is delayed
☒ Notify task initiator when response is posted
☐ Send me a reminder before due date: 1 (Days)

File for Approval
File for Approval: Desert.jpg [Change](#)

Approvers
Select Route: [v] Route Method: ☒ Simultaneous ☐ Sequential ?

	Steps in Approval	Approver	Cancel Approval if rejected *
<input type="checkbox"/>	Product	System Administrator	<input type="checkbox"/>
<input type="checkbox"/>	Regulatory	System Administrator	<input type="checkbox"/>
<input type="checkbox"/>	Legal	Plan Reader2	<input type="checkbox"/>

[Add Approvers](#) [Delete Approvers](#) [Save Route](#)

* Note: This approval will be cancelled if the selected user rejects it.

[Save](#) [Save And Close](#) [Submit](#) [Cancel](#)

The step title is added to the task list to enable reviewers to differentiate between reviews for different steps within the same task.

Marketing Workbench
Request >
Manage >
Perform >
Perform
View Tasks >
View Briefs For Review >

View Tasks
Search: [v]
Project Type: All
Status: Active
Start Date: From: [v] To: [v] Clear
Due Date: From: [v] To: [v] Clear
Task Title Contains: [v]
Search [v]

Task ID	Task Title	Step Title	Project Title	Step Status
1040	Approve Artwork	Regulatory	Promotions Test 5	Active
1040	Approve Artwork	Product	Promotions Test 5	Active

The step title is added on the Task Response screen to allow the reviewer to identify the step in context of the response.

Task Response

Promotions Test 5 > Promotions Deliverable > Approve Artwork

Info User Roles

Project

Task

Task ID: 1040
 Task Title: Approve Artwork
 Instructions: This is a route process.
 Start Date: 26 June 2013
 Status: Active

☐ Notify me if task is delayed
☒ Notify task initiator when response is posted
☐ Send me a reminder before due date: (Days)

Step Details

Step Title: Regulatory
 Instructions: follow regulatory guidelines
 File for Approval: [Desert.jpg](#)
 Click on the above link to view the file.

Response

* Summary: ☐ Approved ☐ Rejected
 * Comments:

Approvers

Save And Close Submit Forward Task Cancel

1.4 Calendars – Personalized Views

R14 Update 2 provides several enhancements to the existing Calendars. Multiple personalized views of the calendar can be created by a user who views the Calendars. The user can also switch between configured dates on the same View.

As an Administrator of Calendars:

Use Calendar Admin to set up a Calendar with several default personalization settings for display.

SAS® Marketing Operations Management

Welcome System Administrator | Home | Profile | Sign Out

Calendar Admin

- Configure Calendar
- Predefined Calendar

Configuration

Calendar Details

Name: 2013 DEMO Marketing Plan

Description: The Marketing Plan Calendar channel displays marketing activities to the user.

Allowed Caching: No

Cache Expiration Interval: 5 Minutes

Calendar Group: System Calendars

Calendar Status: Publish

Personalize: Yes

Target Entity Selection

Target Entity: Marketing Activity | Marketing Activity | Select

Criteria Builder

Drag the field from Target Entity, Related Entities, Related Facets onto the area below.

Navigation Tree

- Marketing Activity Currency Type
- Marketing Activity Description
- Marketing Activity Template Flag
- Marketing Activity Title
- Marketing Activity Planned End Date
- Marketing Activity Planned Start Date
- Marketing Activity Status
- Marketing Activity Creation Date
- Budget Initiated Date
- Marketing Activity Last Updated Date
- STATUSBEFOREREVIEW

Navigation Tree

- 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
 - CONTINUED ACTIVITY

Navigation Tree

- 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
 - Marketing Activity Financial Summary

Define Dates | Define Filters | Define Display Columns | Define Personalization Fields

Default Personalization Fields | Custom Personalization Fields

Personalization Option

Personalization Option	Default Value
Show Holidays	Yes
Show Events	No
Display Mode	Show Start to End Date Bar
Show all items for a day	No

Configure Form

Target Entity | Related Entities | Related Facets

Save | Cancel

Drag and drop the fields the end users can use for personalizing the Calendar and creating various Views. Define the position of the filters on the form by clicking on the **'Configure Form'** button.

Define Dates | Define Filters | Define Display Columns | Define Personalization Fields

Default Personalization Fields | Custom Personalization Fields

Delete | Clear All

Field Name	Field Storage Type *
<input type="checkbox"/> Marketing Activity Activity Type	Single
<input type="checkbox"/> Marketing Activity Status	Single
<input type="checkbox"/> Marketing Activity Activity Level	Single

Drop the field here to configure personalization filter.

*The value stored in the database should contain single or multiple values.

Configure Form




Target Entity | Related Entities | Related Facets

Save | Cancel


The default fields along with the fields selected for personalization are automatically added on the form. Arrange them as required and Save.

Add Section

Personalization Fields

Business Unit	 
Fiscal Year	 
Activity Type	 
Status	 
Activity Level	 


Default Personalization Fields

Show Holidays	 
Show Events	 
Display Mode	 
Show All Items For a Day	 

Read-Only Preview Edit Preview Save Add Translations Cancel

Multiple Date Sets between which the calendar can switch, can be added. Mark one of them as Primary to allow the Calendar to be painted by default on that Date set.

Define Dates | Define Filters | Define Display Columns | Define Personalization Fields



* Date Set Name:  Clear All

Calendar Dates

Field Name	Field Name
Start Date	Drop the field here to configure calendar start date.
End Date	Drop the field here to configure calendar end date.

Add Date Set

Date Sets

<input type="checkbox"/> Name	Start Date	End Date	Primary Date Set
<input type="checkbox"/> Actual Date Set	Marketing Activity.Marketing Activity Actual Start date	Marketing Activity.Marketing Activity Actual End Date	
<input type="checkbox"/> Planned Date Set	Marketing Activity.Marketing Activity Planned Start Date	Marketing Activity.Marketing Activity Planned End Date	

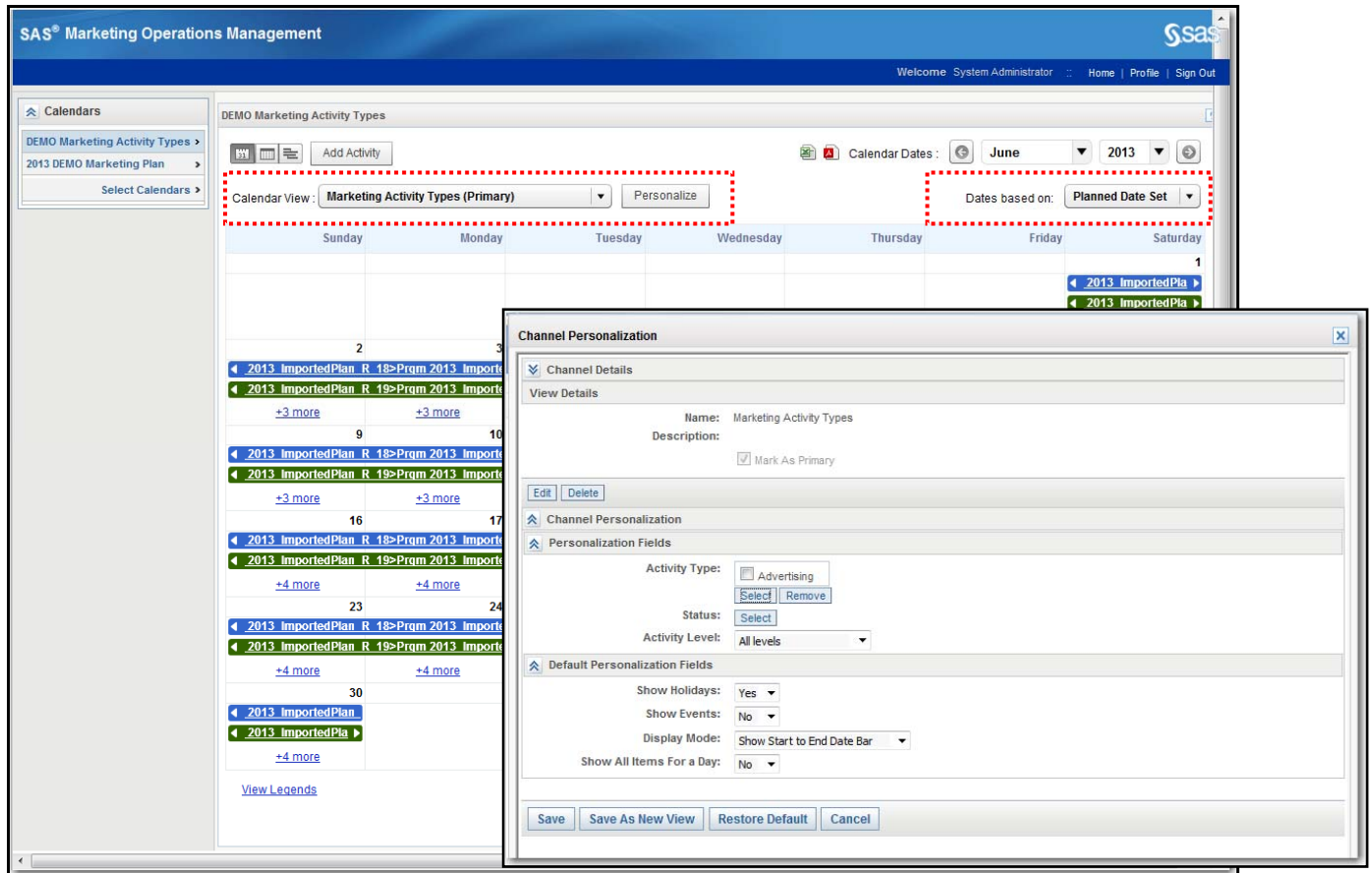
Delete

☒ Target Entity ☐ Related Entities ☐ Related Facets

Save Cancel

As a User of Calendars:

A personalized view of a Calendar that is setup by the Administrator of the system can be created by a user. For example, a Marketing Activities Calendar can be setup by the Administrator, an end user can personalize it with specific Activity types such as “Advertising” and save this View with a name. The user can also switch between the Planned and Actual dates in the same View.



A quick lesson on Views:

1. Enter your personalized filter values, set default personalization settings that drive the display and save the Calendar as a New View with a specific name.
2. Create several Views with different combinations of filters and switch between these views easily.
3. Switch between configured date sets in the same View. See your Activities on a Calendar based on Planned Dates and then see the Actual dates for the same set of Activities.
4. Mark a View as a 'Primary View' that pegs it to the top of your Views list allowing you to go back to it easily.
5. Quickly go to the last modified view in the View list identified with a suffix.
6. Find other Views easily as they are sorted alphabetically based on View Name.
7. Click the '**Restore Default**' button, to clear all settings on a particular View and restore it back to what the Admin configured.

1.5 Digital Asset Management





1.5.1 Batch Download of Assets from E-mail

The Digital Library (DAM) module enables the user to send assets to other individuals via e-mail. To enable e-mail recipients to more efficiently download multiple assets, the DAM e-mail functionality now allows a recipient to batch download multiple assets from a single e-mail. Assuming that e-mail recipients have been granted the ability to download assets; they can select multiple assets from the e-mail page (accessed via the link in the e-mail) and click the 'Download' button.

The screenshot displays an email interface with the following details:

- E-mail header:**
 - From: System Administrator<aladmin@sas.com>
 - To: System Administrator<aladmin@sas.com>
 - Cc: System Administrator<aladmin@sas.com>
 - Subject: many assets
 - Message: [Empty text box]
- E-mail Valid Upto:** 26 July 2013
- Attachments section:**
 - A "Select All" checkbox is at the top left.
 - Four image attachments are shown in a row:
 - Chrysanthemum.j.**: A close-up of a red chrysanthemum flower.
 - Desert.jpg**: A landscape photo of a desert with a prominent rock formation.
 - Hydrangeas.jpg**: A close-up of a hydrangea flower.
 - Jellyfish.jpg**: A jellyfish swimming in blue water.
 - Each attachment has a small "Select" checkbox to its left.
 - A "Select All" checkbox is at the bottom left of the attachment area.
- Action buttons:** At the bottom, there are two buttons: "Download" and "Close". The "Download" button is highlighted with a red dashed border.

Recipients of the e-mail then have the option to either transfer the selected files to a specified destination via FTP or create a ZIP file to download.

Download			
Files to be downloaded	<input checked="" type="checkbox"/> Original	<input type="checkbox"/> Preview	<input type="checkbox"/> Thumbnail
 Name: Chrysanthemum.jpg Version: 1 File Size: 858.78 KB Approximate Download time: 2mins 3secs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Name: Desert.jpg Version: 1 File Size: 826.11 KB Approximate Download time: 1mins 58secs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Name: Hydrangeas.jpg Version: 1 File Size: 581.33 KB Approximate Download time: 1mins 23secs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Name: Jellyfish.jpg Version: 1 File Size: 757.52 KB Approximate Download time: 1mins 49secs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total size of files to be downloaded: 2.95 MB

☐ Include metadata as XMP in Original file.

Select processing to be done on downloaded files.

☐ FTP : Transfer files using FTP
☒ Zip files : Creates a zip file

Compression Files

* Compressed File Name (.zip):

OK Back

1.5.2 Grid View for Digital Asset Finder

The Digital Asset Finder (DAF) functionality enables admin users to create preconfigured queries to allow end users to easily search the digital library. R14 Update 2 enhances the DAF functionality by allowing admin users to configure DAF search results (Digital Assets) to be displayed in either a list or grid view. The grid view displays asset lists in a compressed format that enables easier processing of large result sets if the asset name and thumbnail are sufficient to differentiate results.

Digital Asset Finder	Application Definition
Configure DAF Configure Application	<p>* Application name: <input type="text" value="Application 1"/></p> <p>Description: <input type="text"/></p> <p>Publish application in leftbar: <input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/> DAF Configuration</p> <p>* Select DAF: <input type="text" value="Demo DAF"/> Configure DAF</p> <p>Select operations: <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Generate Catalogue <input checked="" type="checkbox"/> Asset Metadata</p> <p>Layout</p> <p>Layout: <input type="text" value="Grid"/> <input type="text" value="List"/> <input checked="" type="text" value="Grid"/></p> <p>* Default rows for grid view: <input type="text" value="10"/> (Maximum number of rows cannot exceed 1000)</p> <p>* Default columns for grid view: <input type="text" value="4"/> (Maximum number of columns cannot exceed 15)</p> <p><input type="checkbox"/> Allow upload of digital assets?</p> <p><input checked="" type="checkbox"/> Set access control for application</p> <p>Save Cancel</p>

Application 1

Demo DAF

There is no input field specified.

Simple search


Enter search string:


Note: Enter a search string here to perform simple search on all the content in the library.


Search


Search Result


☐ Select All


☐ Chrysanthemum.J...



☐ Desert.jpg



☐ Hydrangeas.jpg



☐ Jellyfish.jpg



☐ Koala.jpg



☐ Lighthouse.jpg


☐ Marketing Activ...


☐ Marketing Plan-...


☐ Marketing Plan-...


☐ Penguins.jpg


☐ Tulips.jpg


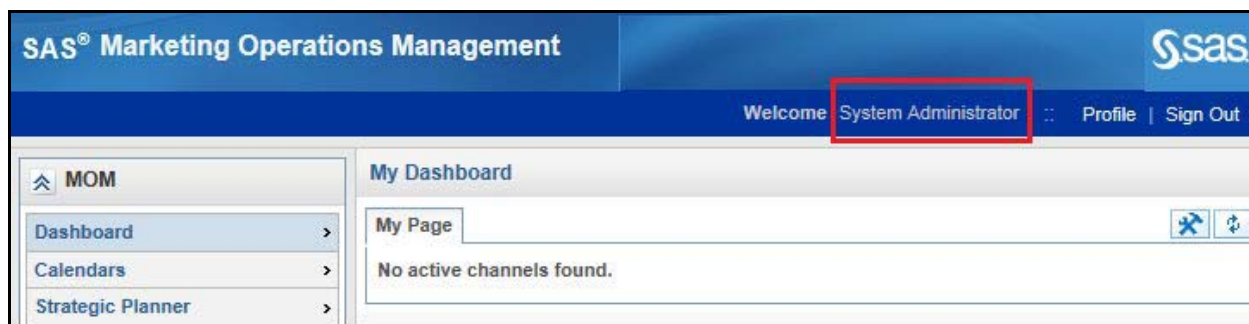
☐ Select All

[Delete](#) [Download](#) [Generate Catalogue](#) [Asset Metadata](#)

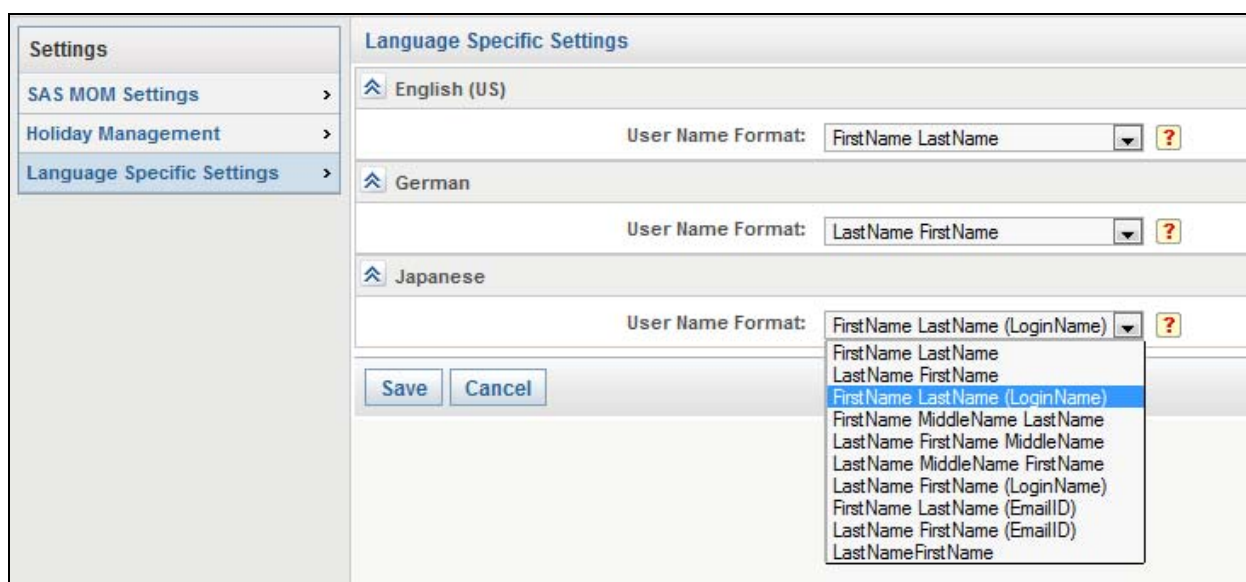
1.6 Internationalization – User Name Formatting

An Administrator user can now define the format for displaying User Names throughout the application. Here is an example in the application where the configured User Name format is displayed:

- **Logged in User Name on Top Bar of the application**

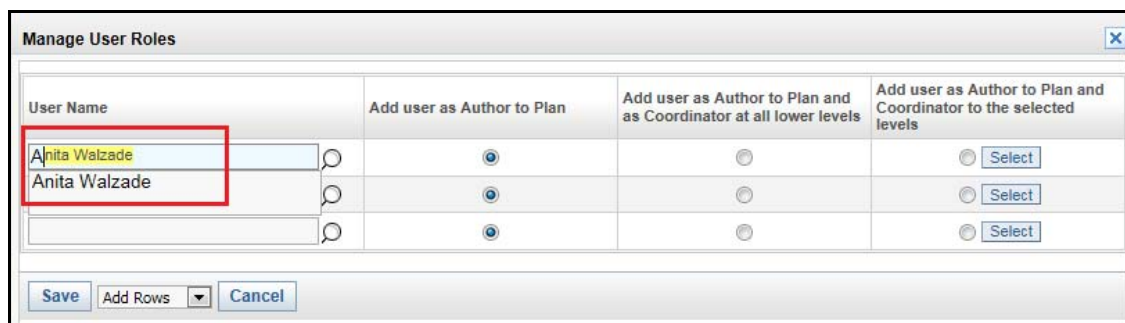


An Administrator user in the system can configure the format of the User Name display from the following screen: Administrator >>Settings>>Language Specific Settings. The Format can be configured for the system per language. There are 10 default format types supported by the system seen in the drop down list below.



Here are some sample areas of the application where the configured User Name format is displayed:

- **User Name Suggestion – Selection control**



- **User Roles Tab**

Info Programs Budgets Scorecard Reviews **User Roles** Versions

Created by: System Administrator
Last Updated by: System Administrator

Author - Users

Users for the Plan	
<input type="checkbox"/>	User Name
<input type="checkbox"/>	Anita Walzade


Delete View Access Add Authors

- **DAM Asset Information screen**

Asset Information

TestVault Previous Asset Next Asset

Lock Freeze Download Preview Download Original Upload Thumbnail Upload Preview Edit



Asset Name: 382037_392862754135660_1554051062_n.jpg
Description:
Expiry Date:

Summary Business Information Versions Comments Labels Claims

Asset Information

Asset Owner: System Administrator	File Size: 24.17 KB
Date Created: 11 March 2013	File Format: JPEG
Current Version: 1	Height (pixels): 480
Current Version Date: 11 March 2013	Width (pixels): 467
Last Version Date: 11 March 2013	DPI: 72
Downloads: 1	Depth: 24
Lock: No	
Freeze: No	

- **Other areas of display**
 - The formatting of user name display includes all modules such as Site Builder, Reports, Change Management, Version screens, Job status screens and other places where a user name is displayed.
- **Some Exceptions to this display - where the User Name will not be displayed as per the configured format:**
 - Report Scheduler and other areas where the User E-mail IDs are being displayed. The format of user name display in such cases will remain <First Name> <Middle Name> <Last Name><Email ID>
 - Vendor Resource name and Resource Management resources – these are displayed as configured while creating the resource
 - Version Comments and Audit log reports where user name is displayed as a part of the change string logged in to the database
 - Approvals job step title that shows the user, contributor or approver's name
 - Some notification messages where User Name and Login Name is displayed in the message

- Where the words “System Administrator” is displayed as a role rather than a User Name.

1.7 New Rich Text Editor

The Rich Text Editor used in SAS Marketing Operations Management has been changed to **CKEditor version 3.6.4**. The Rich Text Editor appears in various places in Marketing Operations Management. Here are some application areas:

1. Form fields where the User Interface displays Rich Text
2. Static Channels in Dashboards
3. Sites in Site Builder
4. Claim e-mails in Claims Management
5. Editing Text Elements in Artwork Producer
6. Editing Text elements and Variable lists in the SAS Digital Marketing integration

A sample use of Rich Text Editor in Dashboard Channel Configuration:

The screenshot shows the 'Dashboard Admin' configuration page. On the left is a sidebar with links: 'Dashboard Admin', 'Configure Dashboard', 'Configure Pages', 'Configure Channels', and 'Predefined Channel Setup'. The main area is titled 'Configuration' and contains a 'Channel Details' section. In this section, the 'Name' field is 'Static channel with Rich Text'. The 'Description' field is empty. The 'Type' is 'Static'. The 'Default' is 'Yes'. The 'Removable' is 'Yes'. The 'Allowed Caching' is 'Yes'. The 'Cache Expiration Interval' is '5 Minutes'. The 'Group' is 'Default Channel Group'. The 'Display State' is 'Maximize'. The 'Status' is 'Publish'. The 'Personalize' is 'Yes'. Below this is an 'Additional Details' section. It shows 'Type: MESSAGE' and a red dashed box around the text 'Message details: Click here for message details.' At the bottom are 'Save' and 'Cancel' buttons.

The new CKEditor interface:

The screenshot shows the CKEditor interface for editing rich text. The title bar says 'Static Text Message'. The toolbar includes buttons for Source, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and others. The text area contains the text: 'This is CKEditor for Rich Text display in SAS Marketing Operations Management. You can type text and format as you please - copy, paste, provide links etc.' The text 'You can type text and format as you please - copy, paste, provide links etc.' is underlined and colored purple. At the bottom are 'Save' and 'Cancel' buttons.

1.8 Strategic Planner

1.8.1 Configurable Activity Type Separator

In Strategic Planner, various activity types can be configured in the system. While creating a program or activity the activity type can be selected from the configured list of types in the system. The types can be configured in multiple levels. For example: Advertising at the root level and its sub types. The separator shown between the root type and sub-type can now be configured in the system in the Strategic Admin settings > Activity configuration section as follows:

The screenshot shows the 'Activity Configuration' window. The 'Separator for Activity Type' dropdown menu is open, showing options: '>>', '>', '<', '<<', and '>=<'. The '>>' option is selected. A red dashed box highlights the dropdown menu and the 'Separator for Activity Type' label.

It then reflects on the screens in Strategic Planner as follows:

Please note that there are certain exceptions to this display in solutions such as Dashboard and Calendars.

The screenshot shows the 'Create Program' window. The 'Program Type' field displays 'Advertising>>Advertising Addressed'. A red dashed box highlights the 'Program Type' field and the 'Select' button. Below the main window, a 'Select Type' dialog box is open, showing a tree view of activity types. 'Advertising' is expanded, and 'Advertising Addressed' is selected. The 'Save' button is highlighted.

1.9 Performance Enhancements

SAS Performance Engineers regularly test the SAS Marketing Operations Management product to analyze application performance in specific scenarios. The results often lead to further optimizations to continue to improve standard interaction response times throughout the application. R14 Update 2 includes several performance-related enhancements based on these testing efforts. Below are some examples of performance improvements for specific interactions.

Please note that metrics are from tests conducted in a test lab environment with a specific data configuration, so results can vary in different environments with different data profiles, user loads, and so on.

1. Marketing Workbench
 - a. Delete Projects – Test result - 6 minutes reduced to 1.2 minutes
 - b. Create Deliverable – Test result - 25 seconds reduced to 17 seconds
 - c. Delete Deliverable – Test result – Delete of 4 deliverables – 5 minutes reduced to 1.2 minutes
2. Handling large volume Data Import from excel files
 - a. Import of Annual Plans in Strategic Planner – Volume Tested with 257 Plans and 15000+ Marketing Activities where earlier only 1000+ Activities could be imported successfully
 - b. Import of Offers in Offer Management – Volume tested with 10000+ Offers where earlier only 1000+ Offers could be imported successfully
3. Large volume Data export from ad hoc reports – Tested with 50000 records - Exported in 40-50 seconds where large volume Data exports resulted in Timeouts earlier.
4. Improved and faster processing for large XML files. The processing time for a 40 KB XML, with 2,500 operations reduced from 1min 25 seconds to 25 seconds. An XML of this size is generated during the operations such as Create Deliverable.