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# **SAS<sup>®</sup> Marketing Operations Management 6.3 User's Guide**

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**SAS® Marketing Operations Management 6.3: User's Guide**

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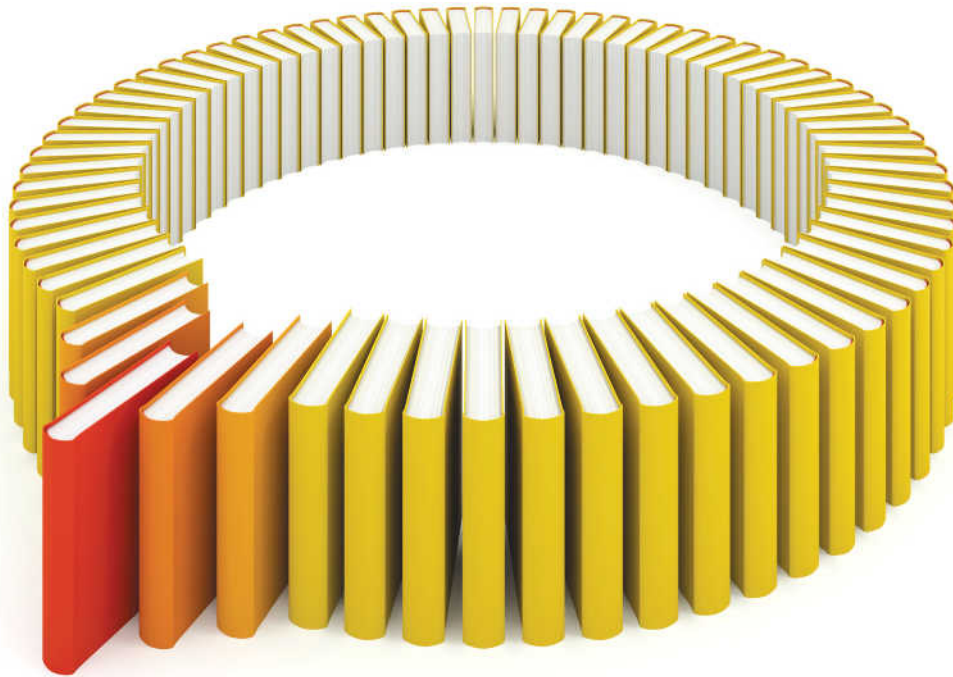
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# What's New in SAS Marketing Operations Management 6.3

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## Overview

SAS Marketing Operations Management version 6.3 is a major release that includes new modules and changes to the existing modules along with several technology and performance enhancements.

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## Resource Management

Resource Management is a new module within SAS Marketing Operations Management that enables marketing organizations to effectively and efficiently plan and allocate human resources across various marketing projects or workflows.

The key features of the Resource Management module are as follows:

- provides insights into human resource availability and utilization
  - enables better project planning and timely delivery
  - manages and tracks changing requirements for resources through the course of project execution
  - results in transparency, collaboration, and accountability across marketing teams and permanent efficiency improvement
- 

## Product Information Management

Product Information Management (PIM) is a new module that enables marketing organizations to manage product information separately from digital assets. Product-based businesses can maintain a central repository of product information. Information can be used to feed multi-channel marketing content. You can supplement standard product metadata that is stored in corporate master data systems (MDM) with information that is specifically applicable to marketing activities.

## Strategic Planner

In the Strategic Planner module, you can view the details of selected offers. A Marketing Manager, Owner, or Coordinator can select offers associated with marketing programs and activities, and can view the details of the offers before making a selection. You can see more information about the offers and can select the right offers during the planning of the campaign or activity.

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## Calendars

Several enhancements are introduced in the Calendars module, particularly to the following calendars:

- Projects Calendar
  - My Tasks Calendar
  - Tasks Resource Calendar for Resources (this is a new calendar for this release)
- 

## Marketing Workbench and Approvals

Enhancements in the Marketing Workbench and Approvals module include the following:

- increased field size for the description field in Approvals Task or Approvals Job
- the Action pane is more visible while you are adding Deliverables to Projects
- a Project ID is added to all Marketing Workbench notifications
- changes to the Process Definition screen layout changes
- enhancements to the Discussion Task Type: pre-configured steps, configured routes, add and delete steps
- default duration for defining steps during configuration
- ability to add Resource Categories into a route
- ability to edit time sheets after submission and before approval
- enhancement to the administration of time sheets: configuring the duration of a Project that is displayed for selection



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## Digital Library

You can now rate and review assets using a five-star rating tool and provide review comments to accompany the rating.

Other enhancements include the following:

- ability to create a new digital asset from an existing asset
- mandatory metadata for assets

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## Artwork Producer and Site Builder

The Artwork Producer and Site Builder modules include the following enhancements:

- Artwork Producer: you can search for artwork using the Artwork Title Containsfilter.
- Artwork Producer: ODS tables are available for creating reports from Artwork Producer
- Site Builder: ability to reorder pages within sites

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## Reporting

Minor enhancements to reports include:

- metrics for task totals are displayed in the Project Details report
- a Cost Category is included in the Activity Budget and Spends report
- hierarchical selection for Business Unit in all reports.

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## Integration of SAS Marketing Operations Management and SAS Marketing Automation

The integration of SAS Marketing Operations Management and SAS Marketing Automation versions 6.1 and 6.3 is enhanced. You can get a list of business contexts from SAS Marketing Automation and custom field values with which to populate SAS Marketing Operations Management custom field values. You can also configure the mandatory field check when you select an option.



# Accessibility

SAS Marketing Operations Management 6.3 has not been tested against U.S. Section 508 standards and W3C Web Content Accessibility Guidelines (WCAG). If you have specific questions about the accessibility of SAS products, send e-mail to [accessibility@sas.com](mailto:accessibility@sas.com) or call SAS Technical Support.



## **Part 1**

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# Introduction

*Chapter 1*

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## Chapter 1

# Introduction To SAS Marketing Operations Management

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## 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, Calendars, Strategic Planner, Offer Management, Marketing Workbench, Resource Management, and so on. You can use these solutions individually or together as an Integrated Enterprise Solution. In addition, there are pre-defined reports related to planning, resource allocations, project status, budgets, content, usage audits, and much more.

### *Dashboard*

The aggregated and summarized information about strategy, plans, budgets, workflows and digital content, and so on, is displayed on the Dashboard. It represents a single point of access to the rich functionality of the SAS Marketing Operations Management

solution which 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**

Calendars help publish the marketing activities, events, offers in a graphical manner improving visibility into marketing operations. It allows better preparedness, planning and efficient collaboration.

### **Strategic Planner**

Users such as product managers, segment managers, campaign managers are enabled to define marketing plans. These plans could consist of campaigns and associated marketing activities specific to each channel such as advertising, direct marketing, telemarketing, event, PR, and so on. Each campaign and activity have schedules associated, budgets, sources of funds and various other attributes.

You can track the committed and spent budgets during the execution of a campaign.

Marketing Operations and Control Teams can be authorized to forecast spends for marketing activities, manage commitments to vendors and track the expenses, invoices and status of the payments.

### **Offer Management**

SAS Marketing Operations Management provides a searchable centralized repository for creating, storing and maintaining Marketing Offers along with relevant information. The offer information can be shared with key stakeholders in the Marketing and Promotions process.

### **Marketing Workbench**

Enables the marketing services and the creative design teams to capture design briefs, define artworks, allocate tasks and track the overall progress of artwork design projects and 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, event management, and so on. It generates schedules and timelines based on these templates and sends automatic e-mail notifications and reminders to internal and external participants as well as contributors.

### **Resource Management**

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 files (documents, artwork and videos, and so on) which are key to business processes. It enables routing of these files to multiple stakeholders in the marketing organization and facilitates consolidation of comments received. This helps to effect action based on feedback.



### ***Product Information Management***

Product information management helps in centrally managing information about products. Information is used in varying environments and contexts such as detailed product descriptions with pricing information in product catalogs or for size and weight data for calculating freight costs in a logistics department. Product information management is a solution for centralized, media-independent data maintenance for providing purchasing, production and communications data for repeated use.

### ***Digital Library***

Helps the marketing teams and external partners to organize, share and to distribute marketing content. The marketing content includes creative artwork, photo libraries, brand identity elements (logos), print, television and 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 and manages multiple versions of artwork.

### ***Claims Management***

Helps create an easy to maintain, easily searchable database of regulatory claims in the system. Detailed information about claims, validity of claims, what claims are currently in the market, and so on, are stored. This facilitates packaging label creation by providing accurate claim information for print.

### ***Knowledge Manager***

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

### ***Site Builder***

Allows marketing managers to build and publish product-related sites with sophisticated site navigation, custom page layouts, rich media and interactive discussion forums. This can be done 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 use standard templates, so that brand identity is preserved, look-and-feel consistency is maintained and existing marketing assets are used well. Artwork can be easily converted into a template for future use. This can be done 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 better accounting of actual hours spent by Resources on Marketing Activities and Projects and helps ease the 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 exported for print or pivoting as per need.

### **Partner Channel Management**

When your marketing organization works with outside partners, vendors, creative agencies and others, the success of your marketing projects depends on providing these third parties with access to all information relevant to a project. But even though information sharing is important, so is privacy. Sharing everything with everyone is not possible. The Partner Channel Management module of SAS Marketing Operations Management is the answer.

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## **Browser Settings for Using the Solution**

*Note:* Disable the pop-up blocker on the browsers that you use for SAS Marketing Operations Management solution.

1. Do the following settings on Internet Explorer for File Download:
  - a. On the browser, go to **Tools** ⇒ **Internet Options** ⇒ **Security** tab.
  - b. Click **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. On the browser go to **Tools** ⇒ **Internet Options** ⇒ **Privacy** tab.
  - b. In the **Pop-up Blocker** section turn off the pop-up blocker for the SAS Marketing Operations Management site.

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## **Log On To SAS Marketing Operations Management**

To access the solution, enter the site address in the browser. The login screen appears. Enter the user name and password. Click **Log On**

*Note:* Only the registered user can access the solution.

**Remember Me:** If this option is selected the first time, then the system remembers the user's credentials. You do not need to enter the user credentials the next time to access the system.

**Forgot Password:** To retrieve a forgotten password, click **Forgot Password?** link on the login page. A forgot password screen appears.

Enter the e-mail address and click **Submit** to submit the request. A notification is sent to the system and the password is sent to the user by e-mail.

**Register Now! - Registering as a New User:** A new user can register by clicking **Register Now!** link. A user registration screen appears.

Enter the details and click **Submit** to submit the registration request. A notification is sent to the system administrator who registers the user. The user is notified by e-mail when the administrator accepts or rejects the registration.

## Dashboard Screen

*Note:* The lowest screen resolution supported by SAS Marketing Operations Management is 1280\*800.

On successful login, the Dashboard is displayed to the right of your screen. The left pane consists of the following menus:

- **MOM (Marketing Operations Management):** Solutions such as the dashboard, calendars, strategic planner, offer management, marketing workbench, resource management, approvals, product information management, digital library, claims management, knowledge manager, site builder, artwork producer, timesheets and reports are listed under this menu. Based on the access control the user can access the solutions by clicking on the relevant link.
- **Tools:** Vendor management is under this menu.
- The following sections are visible only to the administrator:
  - **Administration:** The utilities such as 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 and integration toolkit are under this menu.
  - **Configuration:** The configuration utilities such as schema designer, process designer and UI framework are under this menu.

**User Profile:** To edit the profile, click **Profile** on the top right corner of the Dashboard screen. A user profile screen appears.

You can make the necessary changes in the profile and change the password.

**Log Off:** Click **Sign Out** on the top right corner of the Dashboard screen to safely log off from the system.

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



## Part 2

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# Administrative Tasks

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## Chapter 2

# Users and Groups

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## Overview

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

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## Getting Started

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


Click the name links to access any of the utilities.

---

## Managing Users

### *Viewing Existing Users or Groups*

Click **User Management** link on the Dashboard screen on the left pane under **Administration**. Use the search facility to search for a user by providing the keywords

or listing the users in an alphabetical order by selecting the first alphabet of the name. Click  to view the list of users in a particular group and select the group.

### Creating a User

To create a user:

1. Click **Create** to create a new user.
2. Enter the user details such as the login name, first name and address, and so on (The login name and e-mail address are mandatory fields).

*Note:* The e-mail should have `<windowItem>@</windowItem>`. The only validations are for `<windowItem>@</windowItem>` and for dot after `<windowItem>@</windowItem>`. The number of dots that follow `<windowItem>@</windowItem>` are not checked.

3. Upload the user photograph by click **Upload** (possible only if the **Enable Profile Picture** setting is **Yes**).
4. Select the default solution page for the user from a drop down list. Click **Add** to add the user to a group.
5. Click **Save** to save the user profile.

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

### Unlocking the User Account

A user account is locked in SAS Marketing Operations Management and when a wrong password is entered for the number of times specified in the client settings (default three times). To unlock the account, select the user and click **Unlock**.

### Editing the User Profile

Click the first name link of the user on the user list screen. A read-only **User Details** screen is displayed, click **Edit** to modify the necessary information and click **Save**.

### Creating a Group

To create a group:

1. Click **Groups** on the left pane under **User Management** to view the groups created in the system. A group details screen is displayed where the group hierarchy is displayed.
2. Click **Create** to create new groups.
3. Enter the name (mandatory) and description for the new group.
4. Clicking **Add** and select the users to add the users to the group.
5. Specify the parent and the child groups the current group by clicking **Add** in each section.
6. To add the new group in the list, click **Save**



---

## Registering Users

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

Click first name link to register a user. Validate and enter the relevant information.

Click **Accept** to register the user or **Reject** to reject the user request for registration. Enter the reason for the rejection. A mail is sent to the prospective user informing the user of the registration or giving reasons for the rejection.



## Chapter 3

# Configuring Digital Library

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## Overview of Digital Library

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

---

## Getting Started

After logging on click **Digital Library** link provided on the Dashboard screen on the left pane.

On the left pane under the Administration section there are links to administrative applications as follows:

- **Vaults:** Create or edit vaults and vault properties.

- **Security Policies:** Create or edit security policies for section and vault. The security policy is defined by the administrator, that is, defining what access rights which group of users has in a policy.
- **Settings:** Allow default setting for the application.
- **Asset Descriptor:** Define a set of information to be shown next to each asset thumbnail in the list view.
- **Recycle Bin:** Besides deleting assets permanently, it also allows restoration of deleted assets into the respective section.
- **Asset Metadata Report Configuration:** A template is a preconfigured report layout. You can configure this using the **Asset Metadata Template Configuration** utility. A default template is present in the system.

*Note:* The Administration section is available only to those who have the administrative rights.

---

## Managing Vaults

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

### Creating Vaults

Click **Vaults** link on the left pane under Administration. A list of the existing vaults is displayed. Details such as the name, description, mount point, and type are displayed.

Click **Create** to create a new vault and enter the following details:

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

*Note:* When the disk space is used to the specified capacity, the system sends a mail to the administrator of the system and the section owner about the disk capacity usage. You can include other users to receive the notification, if required.

- **Security policy:** Specify the security policy for the vault. (See the Security Policy section below.)
- Select the **System Vault** check box for storing application-related assets that are not visible to the end users.

If the **Log Audit** settings in the **Settings** are set to True, then the following additional features are available while creating vaults:

1. **Terms and Conditions:** (Optional) The administrator can set terms and conditions for downloading content from the vaults which is optional. In order to control the use of the contents, some departments can enforce the acceptance of the legal Terms and Conditions before downloading assets. While creating a vault, you can set the **Terms and Conditions** for downloading assets from it.

The options available while configuring the Term and Conditions are:

- Use default: You can use the system default Terms and Conditions.
- Use vault specific: If the text option is selected, then enter the text in the space provided. If the file option is selected, then upload a file.

*Note:* PDF and HTML file types are supported but use of images is not allowed

2. **Reason for download:** (Optional) The administrators can track the reason for download. Configure a facet and form for it (Facet created should be associated with the AUDITLOG entity). Different facets can be configured to capture different details as part of the reason for download. While creating a new vault you can associate the facet for the reason for download for a specific vault.

The options available while configuring the Reason for Download are:

- Use default: You can use the default facet.
- Use vault specific: You can use the facets created by the administrator.

After selecting the facet, clicking **Configure Form** to edit the form for the facet. Click **Save** to save the new vault.

**Figure 3.1** Create Vaults

The screenshot shows a web-based configuration form titled "Vault Details". The form contains the following fields and options:

- Name:** A text input field containing "Collateral".
- Description:** A large empty text area.
- Location:** A text input field containing "C:\SASMOM63\_R1\Vaults\Collateral".
- Disk Capacity:** A text input field containing "10" followed by "(GB)".
- Security Policy:** A dropdown menu showing "DefaultSP".
- System Vault:** An unchecked checkbox.
- Terms and Conditions for downloading assets:** A section with a dropdown menu set to "Yes". Below it, radio buttons for "Use default" (selected) and "Use vault specific".
- Reason for downloading assets:** A section with radio buttons for "Use default" (selected) and "Use vault specific".
- Buttons:** "Save" and "Cancel" buttons at the bottom.

*Note:* Vaults have to be located in a folder other than the tenant folder that is it can reside within the installation directory but not under the tenant folder. For example, a vault can be in a folder named vaults under **D:\SASMOM60**. If there is a tenant named **MOM**, do not keep the vault under it as this could lead to performance issues.

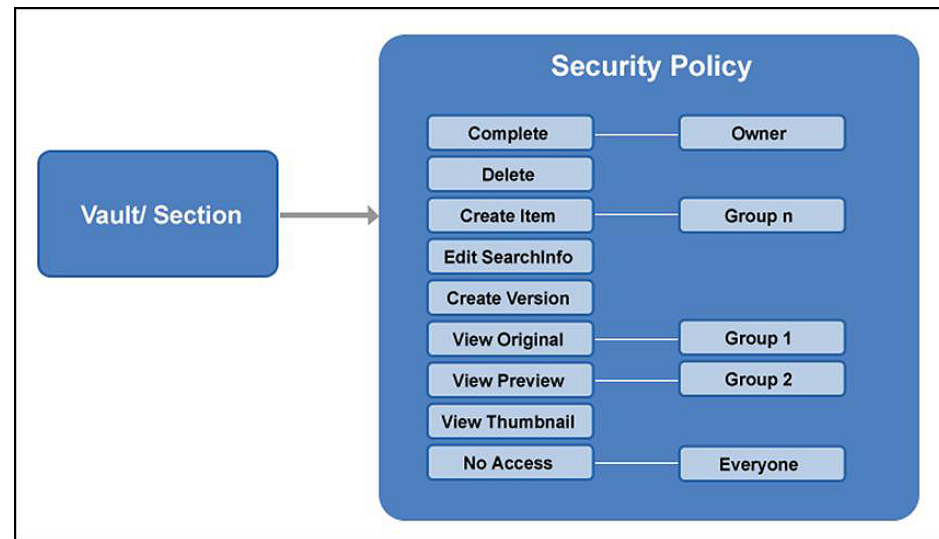
*Note:* To edit the vault details click the vault name link.

## Security Policies

### What is a Security Policy?

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

**Figure 3.2** Security Policy Overview

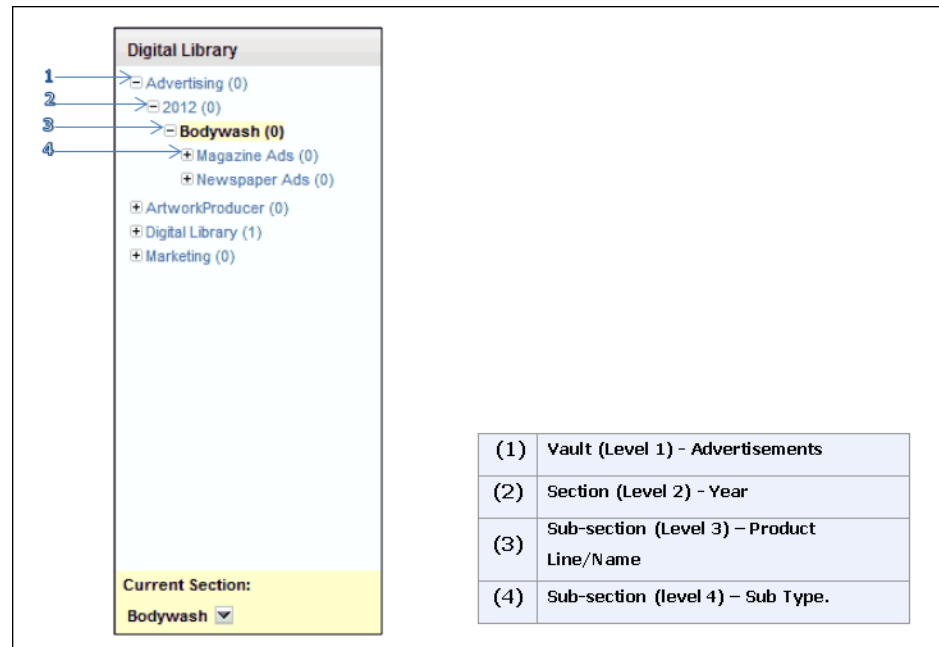


### Organizing Digital Assets

In an organization, you can arrange the digital assets in a hierarchy as follows:

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

Figure 3.3 Vault Hierarchy



**Asset Access Levels**

You can assign different access rights for every group in Digital Library.

The access rights and what actions the right allows the group to perform is shown in the following figure:

Figure 3.4 Access Rights

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

Here is the column description of the access rights:

- The left column has the list of access rights that a group can have in Digital Library. The rights are arranged in the decreasing order of privileges. For example, group A has the access right for create item, which means group A has all the rights below it such as Edit Searchinfo, Create Version, View Original, and so on.
- The top row has the actions that the group can perform in Digital Library as a result of being assigned a certain access right. For example, group A has View Thumbnail

access, which means the users in group A can View Thumbnails, View Moreinfo of the assets of a section to which the user has access to and add comments to the assets. The user cannot view preview, dynamically render, and so on.

*Note:*

- To move an asset from one section to another, you must have Delete access on the source section and Create Item access on the destination section, if not an error occurs. Once the assets are moved, the cart is cleared automatically.
- To copy an asset to another section, the user should have View Original access on the source section and Create Item access on the destination section, if not an error occurs. Once the assets are copied, the cart is not cleared automatically.

## Defining a Security Policy

### Default Groups Available for Security Policies

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

- **Everyone** – All users or groups, who have no explicit access in a policy. Normally, Everyone should get No Access so that the administrator can give restricted access to selected group. This prevents any unauthorized user from having access to any vaults or sections as every user belongs to the group Everyone.
- **Owner** – The user who creates a section is the owner of all the contents in the section. These roles can be given explicit privileges in the security policy and the other groups can be given other access rights based on what actions need to be performed.

Points to consider while defining and applying a Security Policy:

- What are the vaults and sections in the Digital Library?
- What are the groups defined in your system?
- Which groups need what access on which vault or section in the Digital Library at each level in the hierarchy?
- What should be the access given to all other users or groups which do not have access explicitly, that is access for *Everyone*?
- Who is the owner of the section to which the policy is being applied and what should be the Owner's access right?

## Applying a Security Policy

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

- A vault or section can have only one security policy applied on it.
- The policy can include multiple groups of users, each group having a different access right on the vault or section.
- Based on their access rights on the vault or section, the users of the group might be allowed to perform certain actions on the vault or section.

A policy can be applied to one of the following levels of sections:

1. The current selected section only and not its sub-sections.
2. The current selected section and its immediate sub-sections.



3. The current selected section and all the sub-sections and the tree below.

Points to remember while applying a Security Policy:

- **Case 1:** If a user belongs to multiple groups, then as a member of different groups, the user gets different access rights on the same section or vault. The system allows the user to get the highest of all the access rights that apply to the user. **Example:** If User 1 belongs to Group 1 and Group 2. Group 1 has View Original access to Section 1 and Group 2 has View Thumbnail access to Section 1, then User 1 gets View Original access to the section as it is a higher access right.
- **Case 2:** The **No Access** right is the lowest access right. **Example:** If User 1 belongs to Group 1 and to Group 2. Group 1 has **No Access** to Section 1 and Group 2 has **View Thumbnail** access to Section 1, then User 1 gets **View Thumbnail** access to the section as it has a higher access right despite the fact that User 1 has **No Access** as a member of Group 1.
- **Case 3:** Providing access to the users in a hierarchy of sections: A user requires access at all higher levels in the hierarchy of sections to be able to access the lower level sections in the Digital Library. **Example:** If there is a hierarchy of sections in the **Digital Library** ⇒ **Product Name** ⇒ **Images** ⇒ **High Res** and the user has **No Access** on the Images section but has the View Original access on the High Res section. The user cannot navigate through the hierarchy to this section, but can search on the High Res section contents through the simple or advanced search facility. Further if the user tries to search and then navigate to the parent section, the user does not get access to view the parent section.

### Creating Security Policies for a Tenant

Click **Security Policies** link in the left pane under Administration. A list of security policies with its name and description are displayed.

**Figure 3.5** Security Policy Definition

**Security Policy Definition**

\* Name:

Description:

Owner Permission:

Everyone Permission:

**Group Permissions**

<input type="checkbox"/>	Group Name	Access Level	Access Details
<input type="checkbox"/>	Campaign Designer	<input type="text" value="Create Item"/>	
<input type="checkbox"/>	Designers	<input type="text" value="Complete"/>	

To create a security policy, click **Create**. Enter the following details:

- Name – Enter the name of the security policy.
- Description – Enter the description.

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

Here are the access permissions available:

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

To view the access details, click . Save the security policy.

*Note:* Default Security Policy (Default\_SP) is a default security policy available in the system that gives Everyone and Owner complete access. You can apply this security policy to vaults or sections where all the groups get complete access. However, this policy can be altered to prevent any user from creating additional folder structure, which is not approved by the administrator.

---

## User Settings

Click **Settings** link on the left pane under Administration. Use the Settings tool to set the default behavior of the Digital Library solution. The default values for the selected interaction are described as follows:

- Layout: The section content screen can be viewed in a grid or list view. The administrator can set the default layout of thumbnails of the assets and the default number of rows and columns for the list and the grid view. Business information layout can be set either to a single column or a double column.
- Sort: Based on the default preferences set by the administrator the application sorts the vaults, sections, collections and assets by name, date created or popularity. The sorting order can also be in ascending or descending.
- Search Result: You can set the default value for the maximum number of assets returned in a search.
- E-mail Notification: Set the default value for the E-mail validity period in days.
- Vault: Set the default disk space available for vaults created in Digital Library.

- **Batch Download Configuration:** Set the ZIP file validity in days. While downloading multiple files, if you select the ZIP file option, a ZIP file is created with all the selected files. the validity of this file can be set.
- **Terms and Conditions:** You can set the terms and conditions. This works in combination with the *Audits Setting* done in the Settings. If it is set to Yes, then three options are available:

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

- **Text:** You can enter text in the text area for the terms and conditions.
- **File:** You can upload a file of type PDF and HTML for the term and conditions.
- **None:** If this option is selected it means that the setting is on but there is no default terms and conditions. It can be set for each vault while creating the vault.
- **Reason for Download:** If this is set to yes, then while downloading any file from the Digital Library, reason is asked. You can select a facet with. The following options are available:
  - **Use default:** You can use the default facet.
  - **Use vault specific:** You can use the facets created by the administrator.
- **Default Facets to be displayed during Asset upload:** As an administrator of digital assets, you have control over the display of facets when users create or edit assets. The option for configuring facets associated with digital assets to be mandatory or expanded by default is available. If a facet is expanded by default. You can create or edit assets without requiring you to select and add the facet. If a facet is marked *Mandatory*, the facet is expanded by default and users cannot delete the facet when creating or editing assets. The mandatory facet setting enables organizations to ensure that values are entered for mandatory fields for all assets cataloged in the Digital Library.

To save the settings click **Save**.

Figure 3.6 Settings

The screenshot shows the 'Administration: Settings' page. It includes sections for 'Layout' (with options for list and grid views), 'Sort' (by name, ascending), 'Search result' (maximum results for search), 'Email notification' (email validity period), 'Vault' (default disk space for vault), 'Batch Download Configuration' (zip file validity), 'Terms and Conditions for downloading assets' (enable terms and conditions, default terms and conditions), 'Reason for downloading assets' (reason for download, select facet), 'Selected Facets' (reason for download, default reason for download), and 'Default Facets to be displayed during Asset upload'. The 'Default Facets' section contains a table with columns for Facet/Display Name, Description, Display for Selection, Expand by Default, Mandatory Facet, and Configure Item.

Facet/Display Name	Description	Display for Selection	Expand by Default	Mandatory Facet	Configure Item
id_DVID		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
ADD_DIGI/IST		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
TEXT_RANK/L		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
ASSETTYPEINFO	ASSETTYPEINFO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
IMPRESSION_INFO		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
MOI_FACET_DVID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
MOI_FACET		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
PROMOTIONAL_ASSET		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
Tag Taxonomy	This facet stores additional information of asset for taxonomy like tag name, optional value, option display value.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
MOI_OCIO_TREE/VIEW		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
DOIIP Information	This facet stores the DOIIP information about an Digital Assets original file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>
Treatment Email Content	This table stores the treatment information like the from email address, email content, images, subject, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Configure Item</a>

## Asset Descriptor

When the assets or collections are laid out in the list view, additional information related to the assets or collections are shown next to it. The asset descriptor application allows the administrator to select the asset attributes from the asset technical and business information.

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

- **Configure Asset Descriptor:** Select either the assets or a collection for which the attributes are to be displayed. Select the source from where the attributes can be selected. You can associate the facets available in the drop down list.
- **Selected Attributes:** The selected attributes are displayed here. The attribute name and the source appears. In addition, these attributes can be provided with formatting information such as bold, italic and the color. The preview appears.
- **Select Attributes:** A list of attributes from either the selected facet or the digital asset appears. The attributes are displayed with the attribute name and description from the selected source. Select the attributes to be displayed by clicking the check box next to the attribute name and then clicking **Select**.

After selecting the attributes save the settings by clicking **Save**.

Figure 3.7 Asset Descriptor

Administration : Asset Descriptor

▲ Configure Asset Descriptor

Select:

Select Source:

▲ Selected Attributes

<input type="checkbox"/>	Attribute Name	Source	Bold	Italic	Color	Preview
<input type="checkbox"/>	Name	Digital Asset	<input type="checkbox"/>	<input type="checkbox"/>		<span style="color: red;">Name</span>
<input type="checkbox"/>	Description	Digital Asset	<input type="checkbox"/>	<input type="checkbox"/>		<span style="color: yellow;">Description</span>
<input type="checkbox"/>	Asset Created On	Digital Asset	<input type="checkbox"/>	<input type="checkbox"/>		<span style="background-color: black; color: black;">Asset Created On</span>
<input type="checkbox"/>	Product Name	PROMOTIONAL_ASSET	<input type="checkbox"/>	<input type="checkbox"/>		<span style="color: blue;">Product Name</span>

▲ Select Attributes

<input type="checkbox"/>	Attribute Name	Description
<input type="checkbox"/>	Section Path	The hierarchical path of the section in which the asset is located
<input type="checkbox"/>	Section Name	The name of the section in which the asset is located
<input type="checkbox"/>	Description	A brief description of the asset
<input type="checkbox"/>	Lock	Indication of whether the asset is locked
<input type="checkbox"/>	Freeze	Indication of whether the asset is frozen
<input type="checkbox"/>	Name	The name of the asset
<input type="checkbox"/>	Locked by	Name of the person who has locked the asset (if locked)
<input type="checkbox"/>	Asset Created On	The date on which the asset was cataloged into the library
<input type="checkbox"/>	Current Version Date	The date on which the current version of the asset was cataloged
<input type="checkbox"/>	Last Version Date	The date on which the last version of the asset was cataloged
<input type="checkbox"/>	File Size	The size of the original asset file
<input type="checkbox"/>	Download Count	The count of the number of times the asset has been downloaded

*Note:* Additional business information can be associated with a digital asset by associating a facet with the information. Refer to the Schema Designer user guide for more information about creating facets. Associate the facet with the *DIGITALASSET* entity.

## Recycle Bin

The assets deleted by the user, are transferred to the recycle bin. Click **Recycle Bin** link on the left pane under Administration. You can perform the following operations:

- **Delete Permanently:** The administrator or any user from the administrators group can select one or multiple assets and delete them permanently.
- **Restore:** You can select and restore the assets in the recycle bin.
- **Empty Recycle Bin:** You can delete all the assets in the recycle bin permanently.

*Note:* When the assets are deleted from the recycle bin they are not deleted immediately. There is a background service to handle the deletion of the contents. This background service takes care of deleting the contents as well as updating the vault's total used disk space. The assets are cleared from the file system when the scheduled task runs at the appointed time. The system clears the recycle bin and the users do not see the deleted assets in the system or on that machine.

---

## Asset Metadata Report Configuration

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

To add templates click **Add**. An asset metadata template screen appears. Enter the following information:

- **Template Name and Description:** Enter the name and description.
- **Publish Template:** If selected, then the template is visible to the end user.
- **Allow Field Omission:** If selected the end user is allowed to select the fields to be displayed in the report.
- **Asset Summary:** You can select all fields to be displayed on the report. If the administrator selects a few fields, then the end user can select from these fields only.
- **Business Information:** You can select the facets which are associated with the assets and need to be displayed on the report. Select the facet and click **Add** to add it. After the facet is selected, configure the form by clicking **Configure Form**.
- **Version:** Select the fields to be displayed on the form.

Figure 3.8 Asset Metadata Report

**Asset Metadata Template**

Template Name:

Description:

Publish Template:

Allowed Field Omission:

---

**Asset Summary**

Select All

<input checked="" type="checkbox"/> Asset Name	<input checked="" type="checkbox"/> Asset Description
<input checked="" type="checkbox"/> Asset Owner	<input checked="" type="checkbox"/> Asset Created On
<input checked="" type="checkbox"/> Last Version Date	<input checked="" type="checkbox"/> Download Count
<input checked="" type="checkbox"/> Expiry Date	<input checked="" type="checkbox"/> Lock
<input checked="" type="checkbox"/> Locked By	<input checked="" type="checkbox"/> Section Name
<input checked="" type="checkbox"/> Section Path	<input checked="" type="checkbox"/> Average Rating
<input checked="" type="checkbox"/> Number of Ratings	

---

**Business Information**

▲ Facet Selection

Select Facet:

▲ Selected Facets

<input type="checkbox"/> Facet Type Name	Description
No facet types found.	
<input type="button" value="Delete"/> <input type="button" value="Configure form"/>	

---

**Version**

Select All

<input checked="" type="checkbox"/> Version	<input checked="" type="checkbox"/> Current
<input checked="" type="checkbox"/> Created On	<input checked="" type="checkbox"/> Submitted By





## Chapter 4

# Setting Up the Dashboard

---

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## Overview

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


After login click **Dashboard Admin** on the Dashboard screen on the left pane under **Administration** section to configure dashboards, pages and channels. On the left pane of the dashboard configuration screen there are links to administrative applications. By default two dashboards are displayed.

*Note:* To configure and publish the dashboard, decide the layout by creating the pages and adding them to the Dashboard. Then configure the channels and add the channels to the pages.

---

## Configure the Dashboard

### ***Creating the Dashboard***

The Dashboard Configuration screen appears by default with a list of dashboards present in the system. Each row in the list displays the name and description of the dashboard. The dashboard name has a link to edit the dashboard details and add pages to it. You can delete a selected dashboard by clicking **Delete**. Preview the dashboard by clicking .

Click **Create Dashboard** on the dashboard list screen to create a new dashboard. Enter the name, description and select the status. Save the dashboard details.

*Note:* By default, two dashboards are present in the system. You can create a third dashboard for the Partner Channel Management (PCM) module. the name for the Dashboard has to be *PCM Dashboard*

### ***Adding Pages to the Dashboard***


After saving the dashboard, a dashboard details screen appears where you can edit the dashboard details and add configured pages to the dashboard.

You can edit the dashboard details, view the preview of the dashboard, save the changes, delete selected pages and add new pages.

---

## Configure Pages

### ***Creating a New Page***

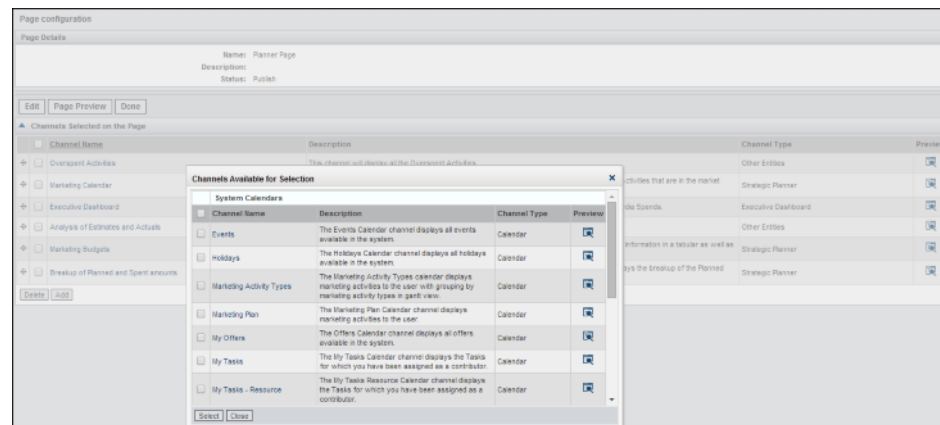
Configure new pages by clicking **Configure Pages** on the left pane. A list of existing pages are displayed. Each row in the list displays the name and description of a page. Click the page name link to edit the page details and add channels to it. You can delete selected pages by clicking **Delete**. Click  to preview the page.

Click **Create Pages** on the page list screen to create a new page. Enter the name, description and select the status. Save the page details.

### ***Adding Channels to a Page***

After saving the page, a page details screen appears where you can edit the page details and add configured channels to the page.


Figure 4.1 Adding Channels to a Page



You can edit the page details, view the preview of the page, save the changes, delete selected channels and add new channels.

## Configure Channels

### Creating Different Types of Channels

To configure new channels, click **Configure Channels** on the left pane. A list of existing channels is displayed. Each row in the list displays the name, description, and the channel type. Click on the channel name link to edit the channel details. Click  to preview the channel.

Click **Create Channel** on the channel list screen to create a new channel. The creation of different types of channels is explained in details the topics below.

### Setting Up Digital Library Channel

#### Creating the Channel

Enter the following details:

- **Name and Description:** The channel name and a description.
- **Type:** Select the type of channel from the drop-down list.
- **Default:** Select whether the channel is shown by default to all users.
- **Removable:** Select whether the end user can remove the channel from the dashboard.
- **Allowed Caching:** Select whether caching is allowed for this channel.
- **Cache Expiration Interval:** For each user the channel contents are cached for a certain time period. The value specified here allows the dashboard services to clear the cache and regenerate new contents for the channel. Select the refresh interval from a drop-down list, which has a time period ranging from 5 minutes to one month.
- **Group:** The channel can be grouped based on their contents. Specify the group for the channel.

- **Display State:** Specify the default appearance of the channel, whether the channel should be displayed in a maximized or minimized state when published.
- **Status:** Select whether to publish the channel. A published channel is visible to the end-users.
- **Personalize:** Set up filters for the content to be shown in the channel. Specify the fields to be displayed in the channel. The end user can overwrite these filters and can specify which columns are to be displayed by personalizing the channel content. If the personalize option is set to No, the user is not allowed to personalize the channel.
- **Target Entity :** Depending on the channel type, entities related to the type will be displayed, for example, if the channel type is Approvals then the target entity is WORKFLOWPROCESS.
- **Additional Details:** This section appears only in the list view. In this section you can specify whether to show all the assets matching the filter criteria or to show restricted number of rows by selecting the appropriate option. Specify the application to be launched.
- **Criteria Builder :** The criteria for displaying assets with information can be built Target Entity, Related Entity, and Related Facets.
- **Define Filters:** Specify the filters. For more information refer to “[Defining Filters](#)” on page 32.
- **Define Display Columns:** In this tab columns to be displayed in the channel can be specified. For more information refer to “[Defining Columns to Display in a Channel](#)” on page 33.

Save the channel definition.

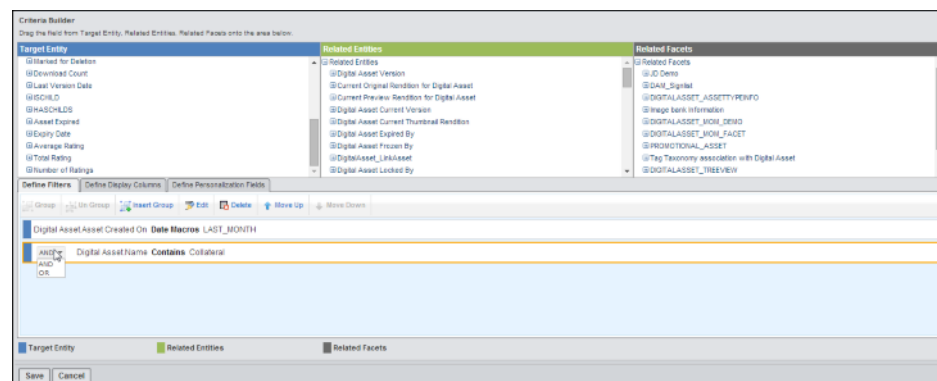
*Note:* For displaying expired assets an additional filter, add an additional filter for fetching the assets.

### Defining Filters

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

*Note:* For the section navigation mode the default filter selected is **SECTION\_DIGITALASSET.Section Path Equal to None**.

**Figure 4.2** Define Filters



When the fields are dragged into the filter tab a select filter popup appears. Specify the operator from the drop down list and enter the filter value. Click **Add** to add the filter.

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

- **Group:** To group the defined filters, select the filters by holding the **Alt** button on your keyboard and click **Group**.
- **Ungroup:** Select the group and click **Ungroup** to ungroup the filter criterion.
- **Insert Group:** Click **Insert Group** to insert a group and then add the filters to it.
- **Edit:** Select the filter criteria and click **Edit** to make changes in the criteria.
- **Delete:** Select the criteria and delete it.
- **Move Up:** Select the criteria and click **Move Up** to position it above the other criterion.
- **Move Down:** Select the criteria and click **Move Down** to position it below the other criterion.

### ***Defining Columns to Display in a Channel***

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

*Note:* For the carousel and section navigation view, by default the name and created on are selected.

When the fields are dragged into the column tab a select column popup appears. Specify the display text, cell type whether it is text or image and the handler URL. Click **Add** to add the filter.

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

- **Delete:** Deletes the selected column.
- **Clear All:** Deletes all the specified columns.
- **Sort On:** Sorts the assets, the sorting is done on any of the column fields in ascending or descending order

### ***Setting Up Personalization Fields for a Channel***

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

### ***Setting Up an Approvals Channel***

The setting up of this channel is similar to the Digital Library Channel. Select **WORKFLOWPROCESS** as the target entity.

### ***Setting Up an Artwork Producer Channel***

The formats generated in Artwork Producer are displayed on the Dashboard without having to go to the Artwork Producer module. The setting up of this channel is similar to the Digital Library Channel. Select **FORMAT** as the target entity and select the display mode as List or Carousel view.

### Setting Up a Knowledge Manager Channel

The setting up of this channel is similar to the Digital Library Channel. Select **TOPIC** or **FORUM** as the target entity. The section where the display mode is selected is not available. Select the filters from TOPIC or FORUM.

### Setting Up a Link Channel

Select the channel type as **Link**. In the additional details section, select the column layout as one or two.

To delete an existing link channel, select the link and click **Delete** in the Links section. Add multiple links by clicking **Add**. Enter the following details about the web link channel popup:

- **URL:** Enter a link to the website or virtual path for a document.
- **Display Text:** This text to be displayed against the Image uploaded for the link.
- **Description:** The description for the link.
- **URL Type:** Select SAS MOM or Non-SAS MOM as the type of the URL. For SAS MOM, use predefined named URL. For Non-SAS MOM enter the complete path, for example, <http://www.google.com>.
- **Launch In:** Select whether the link should be launched in the same browser or in a new browser.
- **Group by:** Group the URLs depending on the type specified in the drop down box.
- **Image File:** Upload an image file for the given URL.

### Setting Up an Other Entities Channel

Besides the major entities described above there are other entities provided by the SAS Marketing Operations Management solution. This is a generalized channel type. Using this channel type information from the other entities in the system can be shown on the dashboard channel. Select **Other Entities** channel type to create the channel. In the target entity selection section select the target entity from a drop down list. The complete configuration of this type of channel is the same as the Digital Asset channel type. Select target entity from the drop down list.

### Setting Up a Strategic Planner Channel

The complete configuration of this type of channel is the same as the Digital Asset channel type. Select target entity as **PLAN, MARKETINGACTIVITY, COMMITMENT or INVOICE**. The Strategic Planner channels displays information of plans, campaigns or activities. These should be configured separately for each user role such as authors, readers for a plan or marketing owner, activity coordinators, budget managers, readers for a campaign or activity. The appropriate role should be selected while configuring the channels based on roles under the define filters list.

### Setting Up a Site Builder Channel

The setting up of this channel is similar to the Digital Library Channel. Select **SITE** as the target entity.

### Setting Up a Static Channel

Select the Static channel type and the file type that you want to upload. you can upload the following types of files:

- **HTML Document:** Upload an HTML file with the additional files which are part of the HTML page the specify the height in pixels. The HTML file must satisfy some constraints:
  - The generated HTML must contain only one body tag.
  - If images and CSS files are part of the HTML page, then their path must contain only the filename. (HTML Page files and images must be created in the same folder).
  - There should be no JavaScript function calls in body tag attributes.
- **Flash file:** You can upload a flash file to be displayed on the channel.
- **Rich text:** Enter the text message to be displayed in the channel. Enter the text message by clicking **Click here for the message details**. You can format your message. Copying and pasting of HTML is not allowed in this text area.
- **Other Document:** You can upload other documents such as text, Microsoft Word, Microsoft Excel, PDF, and so on.
- **Xml and Xsl:** You need to upload two types of files: an XML file, which contains data to be displayed, and an XSL file, which defines the logic for data presentation. Save the channel definition.

### Setting Up a Marketing Workbench Channel

The setting up of this channel is similar to the Digital Library Channel. Select **ACTIVITY** or **WORKFLOWPROCESS** as the target entity.

---

## Predefined Channel Setup

Predefined analytical channels are provided by SAS Marketing Operations Management for the following modules:

1. **Strategic Planner:** The analytical channels for Strategic Planner include comprehensive information about Marketing Plans, Budgets, Commitments, Activities and Assets with the ability to drill down into details. You can create the following channels for Strategic Planner:
  - Marketing Budgets
  - Breakup of Planned and Spent amounts
  - Marketing Calendar
  - Executive Dashboard: All the users in the Executive User group have access to this dashboard. It is not required to give access individually to each group for each of the Plans for a particular Line of Business.
2. **Marketing Workbench:** The channels for Marketing Workbench include details for all the Projects that are currently active. Information for the user who is a Project

Manager or the user who has a read or author access to the Project will see the information. You can create the following channels for Marketing Workbench:

- My Projects
  - Projects Calendar
  - My Projects as Reader
  - My Tasks as Reader
3. **Approvals:** You can configure the following channels for Approvals:
    - My Approval Jobs: The job initiator can see the initiated jobs.
    - My Read-only Approval Jobs: The Approvals Reader can see the read-only jobs.
  4. **Other Entities:** You can configure the following channels for other entities:
    - Analysis of Estimates and Actuals: A predefined channel for viewing the Vendor Estimates versus Actuals.
    - Overspent Activities: A predefined channel for activities where the spent amount is higher than the planned amount.
    - My Briefs as Reader: A predefined channel to view the briefs on which the logged in user has a Read access.
  5. **Marketing Calendars:** You can configure multiple instances of a calendar using different filters such as multiple activities calendars can be set, one for each type of activity such as advertising and e-mail. You can configure the following channels for the marketing calendars dashboard:
    - My Tasks: This channel displays all the workbench tasks or /approval jobs for which the logged in user has been assigned as a contributor.
    - Marketing Plan: The Marketing Calendar channel is an interactive analytical channel that depicts all the Programs or Activities that are in the market during a particular time period in one glance.
    - Holidays: A predefined channel to display all current holidays in the system based on user personalization such as the country selected.
    - Events: A predefined channel to display all current events in the system based on user personalization. All the users of the system can view the events but only the creator can edit this channel.
    - My Offers: A predefined channel to display all current offers available. The users who are part of the offer can view this.
    - Marketing Activity Types: This channel is used to display all current Marketing Activities in the system grouped by Marketing Activity Types.

The analytical channels can be created using the predefined channel setup utility which displays the list of predefined channels in the system. The user can select the channels to be created. These channels are provided with predefined filters and can be setup from the predefined channel configuration in a few quick steps. You can add additional filters and columns to the configuration if required. This utility also assists the administrator to create multiple instances of a predefined channel.



Figure 4.3 Predefined Channel List

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

Follow the steps given below to create a predefined channel:

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

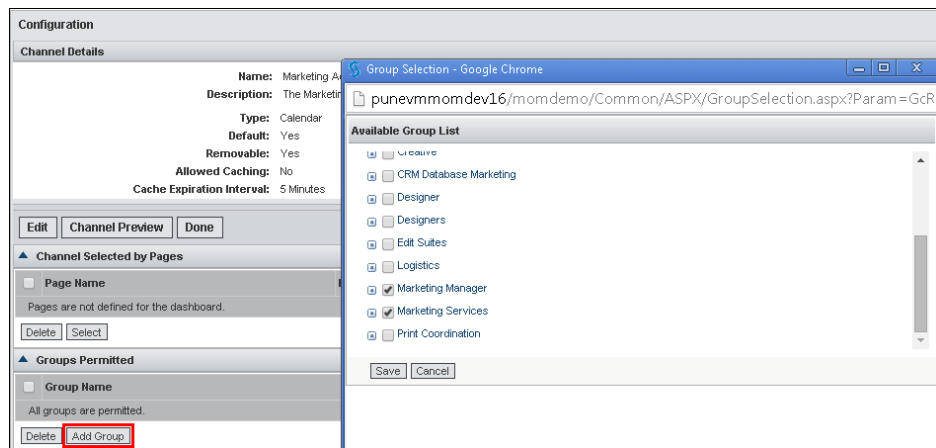
You can modify the predefined channel definition in a restricted manner. You cannot delete the mandatory filter or the display columns but can add a new set of filters or display columns. To modify the channel definitions follow the steps below:

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

## Giving Permissions on a Channel

After configuring a channel you can give exclusive permissions on each channel. Select the groups that should have access to a channel. After creating and saving the channel configuration, on the channel details screen select the groups by clicking **Add Group**.

Figure 4.4 Giving Access to Groups for a Channel



*Note:* If a group has no access to a certain solution, then make sure the group is denied access to a dashboard channel created for that module.

## Chapter 5

# Setting Up the Calendars

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---

## Calendar Administration

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

---

## Getting Started

### Overview

After login click **Calendar Admin** link on the dashboard on the left pane under **Administration** section to configure the calendars. On the left pane of the calendar configuration screen there are links to configure calendars. A list of configured calendars is displayed.

### Configure Calendar

Click **Create Calendar** on the configuration screen to create a new calendar for an entity. A calendar details screen is displayed.

Enter the following details:

- **Name and Description:** Enter the name and description.

- **Allowed Caching:** Select whether caching is allowed for this calendar.
- **Cache Expiration Interval:** For each user the calendar contents, which is displayed, is cached for a certain time period. The value specified allows the dashboard services to clear the cache and regenerate new contents for the calendar. Select the refresh interval from a drop-down list, which has a time period ranging from 5 minutes to one month.
- **Calendar Group:** You can group the calendar on their contents. You can specify the group for the calendar.
- **Calendar Status:** Select whether to publish the calendar. Only a published calendar is visible to the end-users.
- **Personalize:** You can set up filters for the content to be shown on the calendar. Specify the fields to be displayed. The end user can overwrite these filters and can specify which columns are to be displayed by personalizing the channel content. If the personalize option is set to No the user is not allowed to personalize the calendar.
- **Target Entity Selection:** To set up the calendar specify the target entity on which the calendar is based on.
- **Criteria Builder:** Build the criteria for the calendar using the Target Entity, Related Entity, or the Related Facets.
- **Define Dates:** Specify the start and the end dates by dragging and dropping. Refer to [“Defining Dates” on page 41](#) for more information.
- **Define Filters:** Define the filters. Refer to [“Setting Up Filters” on page 41](#) for more information.
- **Define Display Columns:** Specify the columns to be displayed. Refer to [“Defining Columns to Display on the Calendar” on page 42](#) for more information.
- **Define Personalization Filters:** Set the personalization filters to facilitate additional filter criteria. Select and specify the fields, which the end users can personalize.

For the Section Navigation view, by default the section path is selected. Do not select any more personalization fields. Refer to [“Setting Up Personalization Fields for a Calendar ” on page 42](#) for more information.

Save the channel definition.

Figure 5.1 Calendar Configuration

## Defining Dates

You can add multiple date sets by specifying a date set name and clicking **Add Date Set**. The user can switch between the different calendars. Mark one of them as **Primary** to allow the calendar to be painted by default for that date set.

## Setting Up Filters

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

Figure 5.2 Define Filters

After dragging the fields into the filter tab, a select filter popup is displayed. Specify the operator and enter the filter value. Click **Add** to add the filter

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

- **Group**: To group the defined filters, select the filters by holding the **Alt** button on your keyboard and click **Group**.
- **Ungroup**: Select the group and click **Ungroup** to ungroup the filter criterion.

- **Insert Group:** Click **Insert Group** to insert a group and then add the filters to it.
- **Edit:** Select the filter criteria and click **Edit** to make changes in the criteria.
- **Delete:** Select the criteria and delete it.
- **Move Up:** Select the criteria and click **Move Up** to position it above the other criterion.
- **Move Down:** Select the criteria and click **Move Down** to position it below the other criterion.

### ***Defining Columns to Display on the Calendar***

In the define columns tab the columns can be defined by selecting any field from entity fields, related entity fields and related facet fields. Drag the fields into the columns tab below. In the define display columns tab the columns are displayed with the field name, field data type and you need to specify the display separator. You can specify the display columns for every view of the calendar such as the monthly view, weekly view, Gantt view, and so on. When you select the Gantt view, you can group the columns. You can specify the information which will display on a mouse over. Specify the heading for the excel which is generated for the calendar.

On the define columns tab, you can delete the selected columns or clear all the selections.

### ***Setting Up Personalization Fields for a Calendar***

In the define personalization fields tab, define the fields by selecting any entity fields, related entity fields and related facet fields. Drag the fields into the define personalization fields tab below. These are the fields that the end user can personalize on. In the define personalization fields tab, two more tabs are present. They are the following:

- **Display Setting Fields:** By default the following fields are available for personalization on any calendar that is created:
  - **Show Holidays:** The end user can decide whether the holidays need to be displayed on the calendar.
  - **Show Events:** Events are a separate entity from marketing activities in Strategic Planner. The end user can decide whether the events created in the system should be shown on the calendar.
  - **Display Mode:** The end user can decide the display mode of the start and end of an activity.
  - **Show all items for a day:** The end user can decide whether all the items or only the selected items for a day should be displayed on the calendar.

**Figure 5.3** Define Personalization Fields — Display Setting Fields

Personalization Option	Default Value
Show Holidays	No
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

- **Personalization Filter Fields:** You can define the personalization fields by selecting any entity fields, related entity fields and related facet fields. Drag the fields into the define personalization fields tab below. These are the fields that the end user can personalize on in addition to the above fields.

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 **Configure Form**.

## Predefined Calendars

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

**Figure 5.4** Predefined Calendars

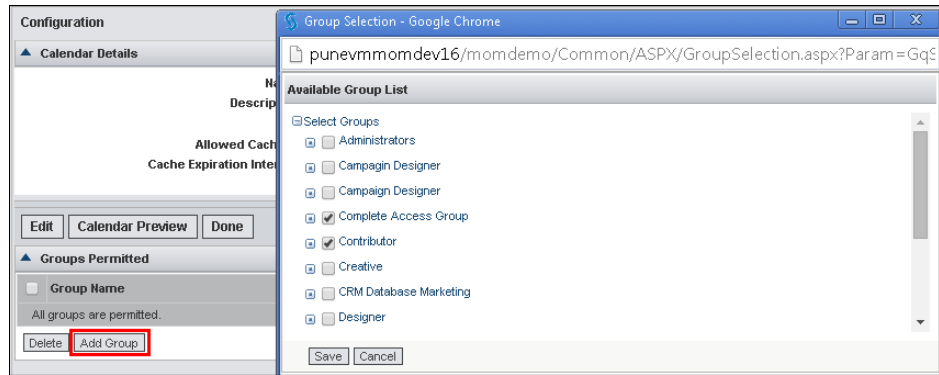
Calendar Name	Description
<input type="checkbox"/> My Tasks	The My Tasks channel displays all the tasks for which you are the contributor.
<input type="checkbox"/> Projects Calendar	The Projects Calendar channel is an interactive analytical channel that displays all the Active Projects for which you are a Project Manager in tabular as well as graphical format.
<input type="checkbox"/> Marketing Plan	This channel is used to display all current Marketing Plans and Activities in the system based on user personalization.
<input type="checkbox"/> Holidays	This channel is used to display all current Holidays in the system based on user personalization.
<input type="checkbox"/> Events	This channel is used to display all current Events in the system based on user personalization.
<input type="checkbox"/> My Offices	This channel is used to display all current Offices available.
<input type="checkbox"/> Marketing Activity Types	This channel is used to display all current Marketing Activities in the system with grouping by Marketing Activity Types.
<input type="checkbox"/> My Tasks - Resource	The My Tasks - Resource channel displays all the tasks for which you are a resource.

Create Calendar

## Giving Permissions on a Calendar

After configuring a calendar you can give exclusive permissions on each calendar. Select the groups that should have access to the calendar. After creating and saving the calendar configuration, on the calendar details screen select the groups by clicking **Add Group**.

Figure 5.5 Giving Access to Groups for a Calendar



*Note:* If a group has no access to a certain solution, then make sure the group is denied access to a calendar created for that module.



## Chapter 6

# Configuring the Strategic Planner

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## Strategic Planner Administration

### Overview

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

On the left pane there is an **Administration** section, which has links to administrative applications, which are as follows:

**Note:** Only if the **Best Practice Builder** setting is set to **Yes**, then you can see the last link.

## Planner Settings

### Overview

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

### Plan Bulk Updates

**Table 6.1** Plan Bulk Updates:

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

### Forecast Configuration

**Table 6.2** Forecast Configuration:

Settings	Expected Values	Explanation
Forecasting required	Yes or No	Whether forecasting is required or not
Forecast Title	User defined	Name of the attribute used for forecasting.

## **Fiscal Configuration**

**Table 6.3** Fiscal Configuration:

<b>Settings</b>	<b>Expected Values</b>	<b>Explanation</b>
Fiscal Year required	Yes or No	You can have a plan per fiscal year or a rolling plan. This setting indicates whether fiscal year is required.
Fiscal Month	Appropriate month	This setting will set the first month of the fiscal year.

## **Business Unit Specific Configuration**

**Table 6.4** Business Unit Specific Configuration:

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

**Budget Configuration****Table 6.5** Budget Configuration:

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

Settings	Expected Values	Explanation
Allow operations for expenses in case of budget rejection	Yes or No	These settings allow or disallow the expense operations in case of budget rejection. The default value is no

### **Release Money Configuration**

**Table 6.6** Release Money Configuration:

Settings	Expected Values	Explanation
Release unallocated amount in case of overspends	Yes or No	You can specify whether to release the unallocated amount, in case of overspend in the marketing activity. If the default value is yes, then a confirmation message is shown before the unallocated amount is released. If the setting is no, then the unallocated amount cannot be released.

### **Activity Configuration**

**Table 6.7** Activity Configuration:

Settings	Expected Values	Explanation
Auto Generate Activity Number	True or False	This setting enables you to auto generate the activity number (at all levels of the activity). Select true to auto generate the number. False allows the end user to enter the activity number manually.
Activity Level 1 Type Selection Required	True or False	You can select the activity type at the activity level 1 (typically a Campaign). Select false to disable the selection of the type. The default is set to True.
Type Selection After Approval	True or False	You can disable the type selection after the budget is approved. This is done where the budget approval process is followed. This setting is used to disable the type selection. The default is set to True.

Settings	Expected Values	Explanation
Same Family Type Selection After Approval	True or False	You can enable the type selection after the budget is approved. This is done where the budget approval process is followed. This setting is used to allow the type selection, but only from the same family.
Allow Invoices in Closed Activity	True or False	Invoices are received even if the activity is closed. This setting allows the user to create invoices in a closed activity.
Restrict Activity Type selection	Yes or No	If this setting is Yes, then only the activity types belonging to the program will be available for selection at the campaign level, for example, if a program level activity is of the type Advertising, its sub types such as Advertising-TV and Advertising-Print Media are available for selection at the campaign level. If this setting is No, then all the activity types are available for selection.
Consider Integrated Campaign as a special type	Yes or No	This setting is visible only if Restrict Activity Type selection is set to Yes. If this setting is Yes, and the named hierarchy for Activity Type has Advertising, Direct Marketing and Integrated Campaign as root level types and you can select Integrated Campaign at the program level. Advertising and Direct Marketing along with their children are available for selection at the campaign level for the program of the type Integrated Campaign. If it is No, the subtypes configured for Integrated Campaign is available for selection.

Settings	Expected Values	Explanation
Display Value for Integrated Campaign	User defined	Specify the name for the Integrated Campaign. This value is always at the root level in the Marketing Activity Type named hierarchy.
Separator for Activity Type	>>, >, -, /, \, ->, =>	Configure the separator between each activity. The default is >>

### Activity Path Configuration

**Table 6.8** Activity Path Configuration:

Settings	Expected Values	Explanation
Grouping on Activity in Lists	True or False	The activity path is stored for each activity from the plan level onwards. This activity path is displayed on the lists either as a column or as a group.
Separator for Activity Path	>>, >, -, /, \, ->, =>	The separator between each level can be configured. This separator is applied both on the list and the reports screens. The default is >>

Set the following other activity configuration parameters:

- Configure activity types as a hierarchy of values. To configure the types click **Click here to configure** link next to the title configure activity type. A named hierarchy details screen is displayed. The existing hierarchy for the activity types is displayed.
- Select the radio button at the level where you want to add values to the hierarchy. Click **Add Value**. An add NH-Value screen is displayed.
- Enter the value and click **Save**. The new value is added to the hierarchy. The total number of values added under the root appears next to it. Add more values using the same interaction. To create a hierarchy within any activity type, select the appropriate radio button and follow the steps to add the value.

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

- **Regions:** Regions are selected while configuring the business units in strategic planner. This is a single level named hierarchy.
- **Products:** Products are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.
- **Target Segments:** Target segments are selected as a part of the marketing parameters in a campaign and activity. This can be a multi-level named hierarchy.

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

### **Plan Authors Access**

The access for the plan author can either be:

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

### **Versioning**

You can do versioning on the plan and the activity screens. Expected value for versioning are:

1. **True:** If the versioning required is set to true, then the versions tab is displayed on the read-only plan and activity details screen. The **Save Version** on the Information tab for these screens is displayed.
2. **False:** If versioning required is set to false then the above-mentioned feature is not available.

### **User Roles Configuration**

**Table 6.9** User Role Configuration:

Settings	Expected Values	Explanation
User Roles Propagation required	True or False	If this setting is true, the user roles selected at the parent level are propagated to the newly created activity. The default is true.
Marketing Owner Propagation required	True or False	This setting allows specifying whether the marketing owners are propagated or not. The default value is false. In this case, the marketing owners are not propagated while creating the lower level marketing activities.



Settings	Expected Values	Explanation
Propagating Plan Authors as Coordinators	True or False	This configuration setting allows the user to specify whether the authors at the plan level should be propagated as coordinators at lower levels or not. The default value is true. In this case, the authors at the plan level are propagated as coordinators while creating lower level marketing activities.
Propagating Plan Readers as Coordinators	True or False / True / False	This configuration setting allows the user to specify whether the readers at the plan level should be propagated as coordinators at lower level or not. The default value is true. In this case, the readers at the plan level are propagated as coordinators while creating the lower level marketing activities.
Show Options to Delete User	True or False	This configuration setting allows the user to specify whether the deletion of a user at any level should result in deletion of the same user at all the lower levels or not. The default value is false. In this case, the user will be deleted at the current level only.
Budget Manager selection type	Multi-select or Single-select	This setting indicates whether the budget manager selection at the activity level should be multiple or a single selection.

## Estimates

**Table 6.10** Estimates:

Settings	Expected Values	Explanation
Display Estimates	True or False	If the display estimates is set to true, then the estimate list is displayed in the expenses tab.
Allow auto generation of estimate number	Yes or No	If this field is set to Yes, then the estimate number is generated automatically. If set to No, then enter the estimate number manually.

Settings	Expected Values	Explanation
Allow auto generation of work item number	Yes or No	If this field is set to Yes, then the vendor number will be generated automatically. If set to No, then enter the work item number manually.
Display min-max volumes in work line item	True or False	If this field is set to true, then minimum and maximum volume columns are displayed in the work line item list.
Allow reviewer to initiate next workflow	Yes or No	If this field is set to yes, then the last reviewer of an Estimate Review Workflow can initiate the next configured workflow. This is done provided all the reviewers have approved the estimate.  <i>Note:</i> This setting is useful only if more than one approval job types are present in the Estimate Package.
Allow to import Actuals for unbudgeted plans	Yes or No	If this field is set to yes, then the user can import actuals for unbudgeted plans. Here are the conditions for unbudgeted plans: <ul style="list-style-type: none"> <li>Plans do not exist in the system at all.</li> <li>Plans exist in the system but the work item number does not exist.</li> <li>Plans and work item number exists but the work line item for the mentioned resource does not exist.</li> </ul>

### Vendor Management

**Table 6.11** Vendor Management:

Settings	Expected Values	Explanation
Allow auto generation of vendor number	Yes or No	If this field is set to Yes, then the vendor number is generated automatically. If set to No, then enter the vendor number manually.

Settings	Expected Values	Explanation
Display Rate Card Item Types in Rate Card	True or False	If this value is set to true, then the rate card item types are displayed for selection while creating a rate card.
Display Resources in Rate Card	True or False	If this value is set to true, then the vendor resources are displayed for selection while creating a rate card.
Display Resources Categories in Rate Card	True or False	If this value is set to true, then the resource categories are displayed for selection while creating a rate card.

### **Commitment Approvals Configuration**

**Table 6.12** Commitment Approvals Configuration:

Settings	Expected Values	Explanation
Commitment Approvals required	True or False	This indicates whether a commitment requires approval or not.
Default Instructions to vendor	User defined	These instructions will appear by default for the vendor resource selected for the approvals of a commitment.
Configure Approval Summary Values		Define the summary values for the approval of commitments by clicking <b>Click here to configure</b> .

### **Expense Configuration**

**Table 6.13** Expense Configuration:

Settings	Expected Values	Explanation
Allow auto generation of commitment number	Yes or No	If this field is set to yes, then the commitment number is generated automatically. If set to No, enter the commitment number manually.

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

### **Best Practice Builder**

**Table 6.14** Best Practice Builder:

Settings	Expected Values	Explanation
Best Practice Builder required	Yes or No	If Best Practice Builder required is set to Yes, then the measurement types for scorecard and brief, project types for workflows are displayed according to the Best Practice. The activity type specific information such as facets are displayed on a new tab

## Change Management Configuration

**Table 6.15** Change Management Configuration:

Settings	Expected Values	Explanation
Track Change History required	Yes or No	If Track Change History required is set to Yes, then the changes made to the Plan and the Marketing Activity are tracked. The property TrackChangeHistory in Plan and Marketing Activity forms are set to True.

## Resource Category Forecast

**Table 6.16** Change Management Configuration:

Settings	Expected Values	Explanation
Resource Forecasting Required	Yes or No	If set to Yes, then the end user can enter resource forecasts in Strategic Planner in the Resources Tab.
Display of Resource Category Forecast to user	Editable or Read-only	If set to Editable, then the end user can edit the Resource Category Forecast in the resource tab on the activity screens. If set to Read-only, the Category Forecast can be imported for the Plan hierarchy but is not editable on the resource tab of the activity screen.

### Activity Nomenclature

**Table 6.17** Activity Nomenclature:

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

### Marketing Parameters Nomenclature

**Table 6.18** Marketing Parameters Nomenclature:

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

## Marketing Parameters Configuration

**Table 6.19** Marketing Parameters Configuration:

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

## Strategic Planner Report Configuration

**Table 6.20** Strategic Planner Report Configuration:

Settings	Expected Values	Explanation
Fiscal Month for the Previous Year	Yes or No	This setting indicates whether the start of the marketing calendar report is the fiscal month of the previous year. For example, If the fiscal year for a plan is 2012 and the fiscal month is November. If this setting is yes, the marketing calendar starts from November 2013. The default is no.
Totals for Report Required	True or False	This setting indicates whether the totals are to be displayed on the report or not. The default is true.

**Access Control Configuration****Table 6.21** Access Control Configuration:

Settings	Expected Values	Explanation
Permitted Group Access	True or False	<p>You can select a set of groups as permitted groups. Only the users of this group are available for user selection. Users such as authors or readers in a plan, coordinators or readers in an activity, and so on, throughout the Strategic Planner solution.</p> <p>To enable this setting, first select true in the list box for the permitted group access. Click <b>Add Group</b> and select the groups for this access in the section below.</p>
Business Unit Universe Group Access	True or False	<p>This setting indicates whether the feature of Business Unit Universe is required or not. If this is set to True, select the universe of users or groups at the Business Unit level. Only those users and groups who belong to the Business Unit Universe are available for selection for the roles of Author, Reader, Coordinator and Owner in the plan and its marketing activities.</p>
Budget Manager Group Access	True or False	<p>Select a set of groups as a budget manager group. The users of this group only are available for the selection of budget managers. If this setting is set to true, all the users of this group have the access to view all the budgets.</p> <p>To enable this setting, select true in the list box for the budget manager group access. Click <b>Add Group</b> and select the group for this access in the section below.</p>



Settings	Expected Values	Explanation
Complete Access For Group	True or False	In Strategic Planner, a set of groups can have complete access on all the plans and the levels below. These are the plan managers who need the highest authority to change anything in any plan, campaign or activity. To enable this setting, select true in the list box for the complete access for a group. Click <b>Add Group</b> and select the groups for this access in the section below.
Plan Universe Access	True or False	This feature allows defining of a universe of users and groups at the plan level. If set to true all the user roles in the plan and its subsequent programs, campaigns, activities and sub-activities below can be selected from this universe only. The default setting is False.
Release Money only by Plan Manager	True or False	If the setting for complete access for group is set to true, then only the users having complete access to plans can release unutilized money allocated to campaigns or activities.
Exclusive Plan Creation for Plan Manager	True or False	If the setting for complete access for a group is set to true, then creation of plans can be restricted to a specific group of users only. To enable this, set the value to true. Only the groups having complete access can have this access.
Show Budgets to all Budget Managers	True or False	If the setting for budget manager group access is set to true, then all budgets can be accessed by the users in the budget managers group. If set to false, each user can access the budgets assigned to the individual.

Settings	Expected Values	Explanation
Allow Default Authors or Readers to be removed from Plan Universe	True or False	For the business unit, specify the authors and readers. These default author and reader groups are added into the plan universe when a plan is created. This setting indicates whether a user is allowed to delete the default authors and readers from the plan universe or not.
Allow Default Authors or Readers to be removed from Plan	True or False	For the business unit, specify the default authors and readers. These default author and reader groups or users are added into the Plan when a Plan is created. If this setting is False, the default Authors and Readers that have been added to the Plan Universe cannot be removed.

### **Marketing Workbench Configuration**

**Table 6.22** Marketing Workbench Configuration:

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

### **Business Units**

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

To configure new business units click **New** and enter the details such as name and description. Specify the region and currency type. You can mark the business unit as obsolete if not in use.

Add the default authors and readers by clicking **Add Group** and **Add User**. If the setting for the permitted groups is set to true, then the users or groups from the permitted groups only are available for selection. If set to false, then all the users are available.

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

You can associate facets to a business unit. For creating facets see the Schema Designer guide. Associated these facets with the **BUSINESSUNIT** Entity.

## Cost Centers

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

To configure new cost centers click **New** and enter the name. Select the business unit for the cost center. You can mark the cost center as obsolete if not in use.

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

You can associate facets to a cost center. For creating facets see the Schema Designer guide. Associated these facets with the **COSTCENTERS** Entity.

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

## Forecast Duration

You can configure flexible forecast durations per fiscal year as per the business needs. You can forecast the budget and the resources for these periods at various activity levels in Strategic Planner.

To configure forecast duration click **Forecast Duration** link on the left pane. An existing list is displayed. To view and edit the details click the name link of the forecast duration in the list.

To configure new forecast durations click **New**. Select the fiscal year and the forecast duration based on calendar months or configured periods. If you select calendar months, then specify the forecasting at the plan and the activity levels. If you select configured periods, you can define the periods with the associated start and end dates and quarters.

Validations are performed to ensure that the forecast for each period does not exceed the parent level amount for the same period. The validations are performed in two areas:

- The forecasted amount allocated for the attribute at child level for a specific duration should not be greater than the forecasted amount configured at the immediate parent level for the same attribute and duration.
- The forecasted amount allocated for the attribute at parent level for a specific duration should not be less than the forecasted amount configured at immediate child level for the same attribute and duration.

An error message is displayed if there is a problem with the validation.

*Note:* There can be a need for having an overlapping forecast duration. There is no validation for it. You need to make the check manually while adding forecasts.

To save the forecast click **Save** or to cancel the operation click **Cancel**.

### **Activity Templates**

Click **Activity Template** link on the left pane to view the existing activity templates. Details such as the title, description and type are displayed. To view and edit the activity templates click the title link in the template list.

To create a new activity templates click **New** and enter the title and description. Select an activity type from the drop down list.

Marketing Parameters such as products, target groups, distribution and objectives. Add these parameters by clicking **Add**. You can delete the existing parameters by selecting it and clicking **Delete**.

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

### **Financial Accounts**

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

To create a new financial account click **New** and enter the name, description and the financial account number. You can mark the financial account as obsolete if not in use.

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

You can associate facets with a Financial Account. For creating facets refer to the Schema Designer guide. Associate these facets with the **FINANCIALACCOUNT** Entity.

### **Cost Categories**

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

To configure a new cost category click **New** and enter the name, description and cost category number. Specify the financial account and the business unit by clicking **Select**. You can mark the cost category as obsolete if not in use.

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

*Note:* Add the financial accounts before creating the cost categories, as each cost category is associated with a relevant financial account.

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

### **Exchange Rates**

Click the **Exchange Rates** link on the left pane to view the existing exchange rates list. The conversion rate for each currency type is set for a tenant. Search for the exchange rates using filters such as the currency display name, currency name, exchange start and end dates and clicking **Search**.

The exchange rate list is displayed by default. Click on the currency display name to view the exchange rates. Add new exchange rates by clicking **Add**.

Enter details such as the currency name, currency display name, conversion rate, from and to dates. To save click **Save** or to cancel the operation click **Cancel**.

Upload the exchange rates by clicking **Upload Exchange Rate** link on the left pane and browse and upload an excel sheet.

## Measurement Types

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

To view measurement types click **Measurement Types** link on the left pane. Details such as name, description, data type and is obsolete (status of the measurement type as obsolete or active) is displayed. To view and edit measurement types click the name link in the list.

To configure new measurement types click **New** and enter the name and description. Select the data type from the drop down list. You can mark the measurement type as obsolete if not in use. Select the activity types and objectives by clicking **Select**. Specify whether the measurement type is applied to all levels or specific levels.

Add the range values if the data type selected is quantifiable or non-quantifiable. Click **Add** and enter the display text and the weightage. To save click **Save** or to cancel the operation click **Cancel**

## KPI Types

Key performance indicators (KPI) are financial and non-financial metrics used to quantify objectives to reflect strategic performance of an organization. KPIs are used in business intelligence to assess the present state of the business and to prescribe a course of action. The act of monitoring the key performance indicators in real time is known as business activity monitoring. Key performance indicators are frequently used to value difficult to measure activities such as the benefits of leadership development, engagement, service, and satisfaction. They are typically tied to an organization's strategy (as exemplified through techniques such as the balanced scorecard).

The key performance indicators differ depending on the nature of the organization and the organization's strategy. They help an organization measure progress toward their organizational goals, especially toward difficult to quantify knowledge-based processes.

A key performance indicator is a key part of a measurable objective, which consists of a direction, key performance indicator, benchmark, target and time frame, for example, increase average revenue per customer from \$10 to \$15 by end of year 2014. In this case, average revenue per customer is the key performance indicator.

To view the existing key performance indicators click **KPI Types** link on the left pane. Details such as name, expression, calculation type and is obsolete (status of the key performance indicators type as obsolete or active) are displayed. To view and edit the key performance indicator type click the name link.



To add new key performance indicator types click **New** and enter the name, description and expression. Specify if the calculation type is numeric, percentage or currency. If the calculation type is numeric or currency specify the precision value. You can mark the key performance indicator type as obsolete if not in use.

In the formulas section, select the left operand, operator and the right operand for the **Expected KPI value definition** and the **Actual KPI value definition**

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


### Activity Type Color Configuration

The following two sections are displayed:

1. **Select Default Color:** Select the default color for all the activity types (in case explicit color is not selected). This color is applied for all the activity types for which an exclusive color is not configured. To select the default color, click  icon and select the default color.
2. **Selected Activity Types:** All the activity types for which the colors are configured is displayed. Select the activity type by clicking **Select Activity Type**. Select one or more activity types from the hierarchy and click **Save**. The selected activity type appears in the list. Select the desired color for the activity type by clicking  icon.

Click **Save** to save all the above actions. To cancel the operation click **Cancel**

The position of the activity type in this list sets the position of appearance of the activity type in the activity calendar. Drag the marketing activities to a desired position by

clicking  icon to determine its order of appearance on the calendar.

### Best Practice Builder

Click **Best Practice Builder** link on the left pane to view the existing list of best practices in the system. This link is visible if the setting for best practice builder is set to Yes. Click **New** to create a best practice.

A create best practice screen is displayed. Enter the name and select the activity type from a configured list. After saving the best practice, view best practice screen is displayed. You can edit the name and the activity type and specify the following details:

1. **Facet Types** - You can associate facets with the marketing activity. The facets are created in Schema Designer. You will see the configured facets in the drop down list.
2. **Form** - After associating facets, you can refresh the forms to display the facet field on the standard form. You can edit the form if required.
3. **Measurement Types** - Select the measurement types configured in the system. This is the scorecard per activity type and these measurement types are associated with the activity types or objectives.
4. **Workflow Brief or Project Types** - You can associate the brief and project to specific activity types.

---

## Other Configurations for Strategic Planner

### Facets for Activity

*Note:* A utility for associating facets in Strategic Planner is not available. The configuration is done manually for each tenant.

- For facet configuration do the following:

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

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

For the common information for all the activities, configure the `<COMMONINFO>` node. If the facet `MOREINFO` having the relation `MARKETINGACTIVITY_MOREINFO` with the marketing activity needs to appear for all activities, do the following configuration, for example:

```
<COMMONINFO>
<RELATIONSHIPNAME>
  MARKETINGACTIVITY_MOREINFO
</RELATIONSHIPNAME>
</COMMONINFO>
```

- For a level-based facet configuration do the following:

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

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

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

```
<RELATIONSHIPNAME>
MARKETINGACTIVITY_DM_CAMPAIGNINFO
</RELATIONSHIPNAME>
```

The overall configuration for a level appears as follows, for example:

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

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

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

```
</RELATIONSHIP>
</RELATIONSHIPLIST>
```

Specify the facet and specific fields in the facet for versioning. Specify the relationship name.

## Move Activity Configurations

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

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

These settings are as follows:

- **Access Control Configuration Setting:** The user roles specified here denote the access required on the activity that is moved. If the user has the configured access on the moved activity, the activity move is possible. The user moving the activity needs to have a Write access on both the source and destination parent.
- **Notifications Configuration Setting:** These configurations denote which user roles of the source parent should receive notifications when the activity is moved.

## Configurable Notifications

*Note:* A utility for this is not available. The configuration is done manually for each tenant.

The notifications sent for various events such as creation of a marketing activity, adding or removing authors, and so on, are configurable. To achieve this, open the *NotificationConfiguration.xml* located at **<Installation Directory>/ <Tenant Name>/ StrategicPlanner / Configuration/ XML**.

The notification configuration XML is as follows:



Figure 6.1 Notifications XML

```

<NOTIFICATIONCONFIGURATION>
  <EVENT TYPE="ADD_PLAN_AUTHOR" XSLTID="5201" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="ADD_PLAN_READER" XSLTID="5202" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_PLAN_AUTHOR" XSLTID="5206" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_PLAN_READER" XSLTID="5207" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="DELETE_PLAN" XSLTID="5208" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">PLAN_AUTHORS</USER_ROLE>
    <USER_ROLE TYPE="TO">PLAN_READERS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REVIEW_PLAN" XSLTID="5216" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO"/>
  </EVENT>
  <EVENT TYPE="ADD_ACTIVITY_COORDINATOR" XSLTID="5203" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
  </EVENT>
  <EVENT TYPE="ADD_ACTIVITY_READER" XSLTID="5204" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="ADD_ACTIVITY_BUDGETMANAGER" XSLTID="5205" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="DELETE_ACTIVITY" XSLTID="5209" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_BUDGETMANAGER" XSLTID="5210" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_ACTIVITY_COORDINATOR" XSLTID="5211" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_ACTIVITY_READER" XSLTID="5212" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REVIEW_ACTIVITY" XSLTID="5217" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO"/>
  </EVENT>
  <EVENT TYPE="ADD_MARKETINGOWNER" XSLTID="5218" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REMOVE_MARKETINGOWNER" XSLTID="5219" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REVIEW_BUDGET" XSLTID="5213" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETMANAGER</USER_ROLE>
  </EVENT>
  <EVENT TYPE="APPROVE_BUDGET" XSLTID="5214" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETINITIATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_CREATOR</USER_ROLE>
  </EVENT>
  <EVENT TYPE="REJECT_BUDGET" XSLTID="5215" NOTIFICATIONREQUIRED="TRUE">
    <USER_ROLE TYPE="TO">BUDGETINITIATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_COORDINATOR</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_OWNER</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_READERS</USER_ROLE>
    <USER_ROLE TYPE="TO">MARKETING_ACTIVITY_CREATOR</USER_ROLE>
  </EVENT>
  <SENDEREQUALTORECEIVER_NOTIFYSENDER>TRUE
</SENDEREQUALTORECEIVER_NOTIFYSENDER>
</NOTIFICATIONCONFIGURATION>

```

To configure whether to receive the notification or not for a particular event, set the value to TRUE or FALSE for the *NOTIFICATIONREQUIRED* attribute.

The node *SENDEREQUALTORECEIVER\_NOTIFYSENDER* indicates whether the notification is sent if the sender is equal to the receiver.

## Report Configurations

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

- **REPORTTOTALSFORCOSTCENTERGROUPINGREQUIRED:** In few of the reports the data is grouped by the cost center. If an activity has more than one cost center, this activity is repeated for each cost center. In this case, the reports total will include the activity amount more than once, which gives an incorrect amount. You can hide the reports total in this case. This is possible using the setting

*REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED* set to False. The default is FALSE.

- *REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED*: In few of the reports the data is grouped by the financial account. If an invoice has more than one cost categories (in turn associated with a financial account), this invoice is repeated for each financial account. In this case, the reports total will include the invoice amount more than once, which gives an incorrect amount. You can hide the reports total in this case. This is possible using the setting *REPORTTOTALSFORFINANCIALACCOUNTGROUPINGREQUIRED* set to False. The default is FALSE.
- *SHOWCURRENCYINREPORTS*: There could be a case where only one currency is used for all the plans, programs, commitments, invoices, and so on. In this case, the currency do not need to be shown in the reports. You can hide this by setting false for *SHOWCURRENCYINREPORTS*. The default is TRUE.

## Import Invoice in Strategic Planner

### Overview

You can import multiple invoices in Strategic Planner. This is facilitated through a utility that is executed as a scheduled task from the application server machine. The utility imports the invoices and associates it with the existing commitments and marketing activities. You can import the Invoices with or without the line items. Provide a well defined XML format for the invoices to be imported. Various validations are done to check if the data is provided correctly in the imported invoices. The status of each imported invoice is logged and you can view the details through a standard report in SAS Marketing Operations Management. You need to have access to the Application server where you need to add the XML files for processing. The folder is a shared location. This is not exposed to the user through any user interface. This feature is used when SAS Marketing Operations Management is integrated with any third-party system used for invoicing. A well-defined XML is created with invoice details. This XML is dropped in the location from where the invoices are processed and imported into SAS Marketing Operations Management.

### Prerequisites

Importing invoices requires certain settings to be done. Be sure to set the values for **Import Invoice Settings**. Click **Settings** link on the left pane on the dashboard under **Administration**. In the **Import Invoice Settings** section, set the values for each.

**Figure 6.2** Import Invoice Settings

▲ Import Invoice Settings

Invoice MountPoint:  ?

Archive File Path:  ?

Send Notification for Imported Invoices: No ▾ ?

Email Ids for Imported Invoice Notification:  ?

**Table 6.23** Import Invoice Settings

Setting	Expected Values	Explanation
Invoice MountPoint	User defined	This is the path where the invoice xml is loaded for processing.
Archive File Path	User defined	This is the path where the imported invoice files are archived after processing.
Send Notification for Imported Invoices	Yes or No	If this setting is set to Yes, then a notification is sent to all the users selected below for all the processed files.
E-mail IDs for Imported Invoice Notification	User defined	E-mail IDs of the users who should receive the notification. In case of multiple users, enter comma separated e-mail IDs.

### Setting Up a Scheduled Task

The invoices are imported using *ALImportInvoiceUtility.exe* utility present at `<Installation directory>/Binaries` on the Application server. Set up a schedule task which will execute this exe at the time and interval required by the customer. Steps to schedule a task is available on the Internet. Refer to the following URL: <http://windows.microsoft.com/en-au/windows/schedule-task#1TC=windows-7>

### Import Invoice XML Details

1. Naming Convention: The XML file containing the invoice details that needs to be imported should follow a naming convention. The filename naming convention is Invoices\_<Date>\_<Time>.xml, for example, Invoices\_29052014\_1436.xml
2. XML Structure is as shown in the figure below.

Figure 6.3 XML Structure

```

<INVOICELIST>
  <INVOICE>
    <INVOICENUMBER>Dummy_Invoice 001</INVOICENUMBER>
    <VENDORNUMBER>Dummy_10005</VENDORNUMBER>
    <TITLE>Dummy_Invoice for demo</TITLE>
    <COMMITMENTNUMBER>Dummy_Commitment 5 for Demo</COMMITMENTNUMBER>
    <CURRENCYTYPE>CAD</CURRENCYTYPE>
    <INVOICECREATEDON>
      <DAY>10</DAY>
      <MONTH>2</MONTH>
      <YEAR>2009</YEAR>
    </INVOICECREATEDON>
    <INVOICEPAIDON>
      <DAY>12</DAY>
      <MONTH>2</MONTH>
      <YEAR>2009</YEAR>
    </INVOICEPAIDON>
    <INVOICEAMOUNT>
      <AMOUNT>50.00</AMOUNT>
    </INVOICEAMOUNT>
    <INVOICEDUEON>
      <DAY>4</DAY>
      <MONTH>11</MONTH>
      <YEAR>2006</YEAR>
    </INVOICEDUEON>
    <INVOICEDATE>
      <DAY>8</DAY>
      <MONTH>2</MONTH>
      <YEAR>2009</YEAR>
    </INVOICEDATE>
    <ACTIVITYNUMBER>Dummy_Program#001</ACTIVITYNUMBER>
    <INVOICE_LINEITEM>
      <LINEITEMS>
        <ITEMAMOUNT>
          <AMOUNT>400</AMOUNT>
        </ITEMAMOUNT>
        <DESCRIPTION/>
        <COSTCATEGORYNAME>Dummy_Cost Category 2</COSTCATEGORYNAME>
        <QUANTITY>40.00</QUANTITY>
        <RATE>
          <AMOUNT>10.00</AMOUNT>
        </RATE>
      </LINEITEMS>
    </INVOICE_LINEITEM>
  </INVOICE>
</INVOICELIST>

```

### Import Invoice Report

A report which gives the details of each processed file and each invoice processed within the file is provided. To generate the report go to the Reports link on the dashboard screen. Go to the Strategic Planner reports and generate the Imported Invoice List report.

## Chapter 7

# Customizing Offer Management

---

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---

## Overview

Create offers and set access control on the offers using the Offer Management Administration module. You can set the color configuration for the offers on the offer calendar using this module.

## Getting Started

Click **Offer Management Admin** in the left pane under the Administration menu. A Settings screen is displayed. Click **Edit** to modify the offer settings and access control. The following links are available under the Offer Management Admin:

**Figure 7.1** Offer Settings

1. **Settings:** You can configure the following settings:
  - **Allow auto generation of Offer Code:** If yes then the offer code is generated automatically, else it should be entered manually
  - **Allow Change Management:** If yes then the audit history for the offers is available for the end user to view.
  - **Configure Offer Types:** Configure the offer types by clicking **Click here to configure**. Add values for this named hierarchy.

- **Enable Auto Lock Dates:** The Offer Management module enables offers to be locked to prevent unwanted changes prior to or during in-market dates. The administrators can configure the setting of an auto lock date based on the **Offer Valid From** date. For example, as a best practice, a company can choose to auto lock offers two weeks before the date on which the offer goes live in the market. 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. Click **UI Framework** on the left pane under Configuration of the Dashboard screen. A new window with the solution list is displayed.
  2. Click **Campaign Manager** to see the form list.
  3. Click FRM\_OfferSummary link.

Figure 7.2 Form List

Form Name	Display Text	Edit
TreatmentForm	Treatment Details	✎
FRM_CampaignSummary	Campaign Summary	✎
FRM_CampaignCreate	Create Campaign	✎
FRM_CampaignInfo	Campaign Info	✎
FRM_EntryTemplateDetails	Summary	✎
FRM_EntryTemplateDetails	Delivery Method	✎
FRM_TreatmentPreview	Treatment Preview	✎
FRM_OfferPreview	Offer Preview	✎
FRM_CampaignSchedule	Campaign Schedule	✎
<b>FRM_OfferSummary</b>	<b>Offer Summary</b>	<b>✎</b>

4. The form details are displayed. Click  next to the **Auto Lock Offer On** field to view the field details.

Figure 7.3 Add Field Screen

Label:

Content Type:

UI Type:

Date Model:

Date Dependency:

Show Clear buttons:

Field Display Type:

Field Visible:

Mandatory:

Define Rules: No rules defined.

Define Condition: No conditions defined.

Configure Web Service: No web service configured.

Column no.:

Help Header:

Help Content:

Instructions:

Label Properties   Field Properties

**Configure Date Dependency**

Field Name: Auto Lock on

Depends On:

Operations:  by  Days  Months  Years


Consider Non Working Days:

5. On the Add Field screen configure the date dependency by clicking **Configure**. A **Configure Date Dependency** popup is displayed. Edit the **Operation** field to meet your requirements.

Only if the above feature is switched on, the end user can enter the **Auto Lock Offer On** date while creating or modifying an offer. The default date is what is set by the administrator. The end user can edit it. The offer is locked automatically on this date. Only the Offer Manager can edit the offer after it is locked.

- **Allow Offer Manager to Edit Locked Offers:** If yes, the Offer Managers can edit offer which are locked. This capability applies to users specifically assigned to an Offer Manager group
- **Offer Manager Group Access:** If yes then specify the groups which belong to the **Offer Manager Group** by clicking **Add Group**. These groups have access to all the offers created in the system.

Save the settings.

2. **Offer Type Color Configuration:** You can set the colors for each offer type. Each offer type will appear in the selected color on the offer calendar. Select the offer types by clicking **Select Offer Type**. For each offer, click  to select the color. Save the configuration.

**Figure 7.4** Color Configuration for Calendar








## Chapter 8

# Setting Up Marketing Events

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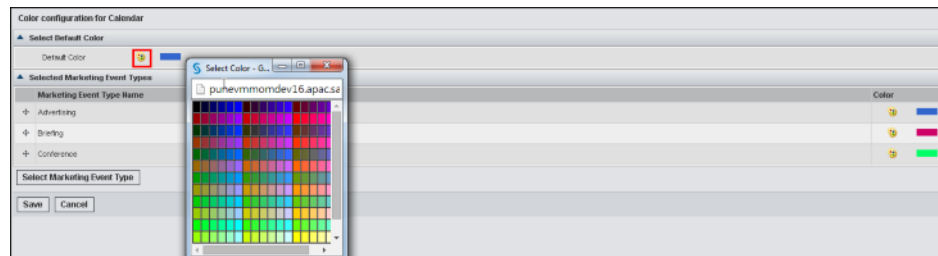
## Getting Started

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

The default color and the selected marketing event types are displayed. To edit the default color and the marketing event type color by clicking  icon.

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

**Figure 8.1** Color Configuration for Calendar



Save the settings. These selected colors will appear for the marketing events on the marketing calendar.



## Chapter 9

# Customizing Approvals

---

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---

## Overview

After logging in click **Approvals Admin** on the dashboard screen on the left pane under **Administration**. An approval settings screen appears.

You can do the following settings on this screen:

**Table 9.1** Approval Settings

Settings	Expected Values	Explanation
Delete Mode for Approval Job	Authorized or Restricted	<p>The authorized mode allows the deletion of an approval job with any status.</p> <p>The restricted mode allows deletion of an approval job with the status as new or draft.</p> <p><i>Note:</i> On a production server, the default should always be the restricted mode.</p>
Attachments required for Approval Job	Yes or No	This setting specifies whether attachments are required for the approvals job or not.
Configure Summary Value for Approval Job		Click the link to configure the named hierarchy values for the approval job.

Settings	Expected Values	Explanation
Cancel approval if rejected	True or False	If the setting is true, the cancel approval if rejected check box is selected by default in the approval job. If it is false, the check box is not selected by default.
Show Global Routes	Yes or No	If the setting is yes, the routes created by the admin are visible to all users. If the setting is no, the end user will see the routes created by the individual only.

Save the settings by clicking **Save**.

---

## Configure Summary Value in Approvals

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

1. Click **Configure Summary Value** link. The predefined summary values such as Approved, Rejected, Skipped and Canceled are displayed.

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

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

## Chapter 10

# Configuring Resource Management

---

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---

## Overview

Resource management provides the following functionalities:

- Create and manage resource categories in a hierarchy.
- Assign a resource category manager to a resource category.
- Create and manage human resources and associate them with resource categories.
- Define weekends and standard holidays for the resource
- Other Settings for Resource Management and Timesheets.

On the left pane, under **Administration**, click **Resource Management Admin** to configure the settings for Timesheets and Resource Management.

---

## Creating Resource Categories

By default, a list of created resource categories are displayed. Click on the name link to edit the resource category. A search is available where the resource categories can be searched for. Select filters such as resource category name and show resource categories (whether active, obsolete, or all resource categories should be displayed in the list below).

To create a new resource category,

1. Click **New**. A create resource category screen is displayed.

2. Enter the name, description, select the unit of measure and enter the resource category head. The resource category head is a user created by the administrator.
3. Enter the first letter for the resource category head to get a drop down list of the users starting with the letter entered. All the resources belonging to this category report to the selected resource category head. A resource category can be marked as obsolete. These resources can be selected for any activities or projects.
4. Save the resource category by clicking **Save**.

## Resources

### Overview

Click **Resources** on the left pane under **Resource Management Admin** to view a list of configured resources. A view resources screen appears. Search for Resources by selecting filters such as resource category, resource name, and show resources (whether active, obsolete or all resources).

### Creating New Resources

Click **New** to add new resources. The **Create Resources** screen appears.

Enter the following details for creating new resources:

1. **Is user registered in the system:** If this check box is selected then the users created in SAS Marketing Operations Management application can be selected as resources. If not, then the resource could be a non-human resource and will not be available in the resource management module for allocations.
2. **User:** Enter the resource name if the user is not a registered user in the system, else need to select the user from the registered list.
3. **Description:** Enter the description.
4. **Resource Category:** Select from a list of configured resource categories by clicking **Select**. To remove a selected resource category click **Remove**.
5. **Resource Type:** This is a named hierarchy and can be configured using Schema Designer. The named hierarchy to be configured is RESOURCETYPE.
6. **Unit of Measure:** Hour is the unit of measure.
7. **Rate:** Select the currency and enter the rate for the resource.
8. **Skill Level:** Select the skill level of the resource from a predefined list.
9. **Country:** Select the country the resource belongs to from a predefined list.
10. **Is Obsolete:** Resources can be marked as obsolete if they are no longer required as a resource. This can be done only while editing the resource details.
11. **Available Hours Per Week:** Enter the available hours of a resource such as, how many hours per day and how many days in a week the resource is available.

Save the resource.

## Viewing Resources

On the View Resources screen, click the name link of the resource to view the resource information and to check the availability of the resource.

On the **Information** tab, the resource information is displayed which you can edit.

On the **Availability** tab, the availability of the resource can be marked by selecting the dates. Enter the reason for the unavailability, and click **Mark as unavailable**. To mark a resource available, select the dates marked as unavailable and click **Mark as available**. To save the changes click **Save Changes**.

---

## Resource Management Settings

Click **Resource Management Settings** on the left pane to do the following settings:

- **Show Resource Availability Tab:** If **Yes**, the **Availability** tab is shown on the resource screen where the administrator can check and change the resource availability. If **No**, the availability tab is not displayed on the resource details screen. The category head can mark the availability of a resource from Resource Management. The default value for this setting is No.
- **Show Resource Category Plan Graph in Executive Dashboard:** Specifies whether to show the Resource Category Allocation Graph for a selected plan in the Executive Dashboard channel. The default value for this setting is **Yes**. The graphs displayed on the dashboard are for Capacity Planning and not for Resource Management in Marketing Workbench.
- **Show Resource Category Plan Graph in Marketing Budgets channel :** Specifies whether to show the Resource Category Plan Graph at Plan, Program or Activity level within the Marketing Budgets dashboard channel. The default value for this setting is Yes. The graphs displayed on the dashboard are for Capacity Planning and not for Resource Management in Marketing Workbench.

---

## Timesheet Settings

Click **Timesheet Settings** on the left pane to do the following settings:

- **Timesheet View:** The default value for this setting is Daily. This setting determines the frequency with which timesheets will be submitted and approved. This will also determine the default view of timesheet submission and approval. Currently there is only a Daily View of the Timesheet.
- **Flag Timesheet for Approval if (> number of hours per day):** Default value for this setting is 10 . This setting will determine the maximum number of hours a resource can work for a day. A timesheet that exceeds the number of working hours in a day will be flagged off for the approver to alert of an exceptional condition
- **Duration for Project Display (in weeks):** In timesheets, the projects in the drop-down list are displayed based on the values configured here. The value entered is in weeks (1-52). The projects whose start dates and due dates belong to the following period are displayed: 'start date of project <= timesheet date + number of weeks

entered' and 'timesheet date - number of weeks entered <= due date of project'. The default value is 4.

- **Timesheet Approval Group or Users:** Select the groups and the users who can approve the timesheets. You can select multiple users or groups.



## Chapter 11

# Configuring Product Information Management

---

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---

## Product Information Management Administration

### Overview

Product Information Management system manages the products of a company. The product information can be created in SAS Marketing Operations Management system or synchronized through integration with other third-party Master Data Management (MDM) systems. You can define a hierarchy and terminology for the objects to match your company's nomenclature and grant access rights to users and groups.

### Prerequisites

To use the Product Information Management system, you need to enable it. Click **Settings** on the dashboard on the left pane under Administration. Go to the **Product Information Management Settings** and enable it. The Product Information Management admin and the user link will be available.

### Getting Started

Click **Product Information Management Admin** on the Dashboard screen on the left pane under Administration. A Product Information Management Settings screen appears. The following sections are visible:

1. General Settings:
  - **Integrated Deployment Mode:** You can select the integrated mode where an integration with other Product Information Systems is possible. When this mode is selected actions such as create product and its business entities, delete and marking as active or inactive is not possible. The products and its business entities are in sync with the integrated system, modification or updating of the existing product is allowed. If the non-integrated deployment mode is selected action buttons for create and delete are visible. You can create, delete, update and mark the products and its business entities active or inactive.

- Select the Business Entity Hierarchy: Select the starting point for the end user. The end user can start with the product or the stock keeping unit (SKU). You can select each level. You can define the hierarchy up to four levels. You can select the lower level if its corresponding higher level is selected. For example, you can select **Packaging Element** only if you have selected **Package** and you can select **Product Component Content** if you have selected the **Product Component**.

Figure 11.1 General Settings

2. Business Entities Nomenclature: You can change the terminology for all business entities to match your company’s nomenclature. The defined Product Information Management hierarchy levels and nomenclature is reflected throughout the system. To edit click **Edit Custom Names**.

Figure 11.2 Business Entity Nomenclature

System Name	Custom Name (Singular)	Custom Name (Plural)
Product	Product	Products
Stock Keeping Unit (SKU)	Stock Keeping Unit	Stock Keeping Units
Package	Package	Packages
Packaging Element	Packaging Element	Packaging Elements
Product Component	Product Component	Product Components
Product Component Content	Product Component Content	Product Component Contents

[Edit Custom Names](#)

You can edit the business entity names and can specify the nomenclature based on the company requirements. You can give custom names in different languages such as German, Japanese and Korean.

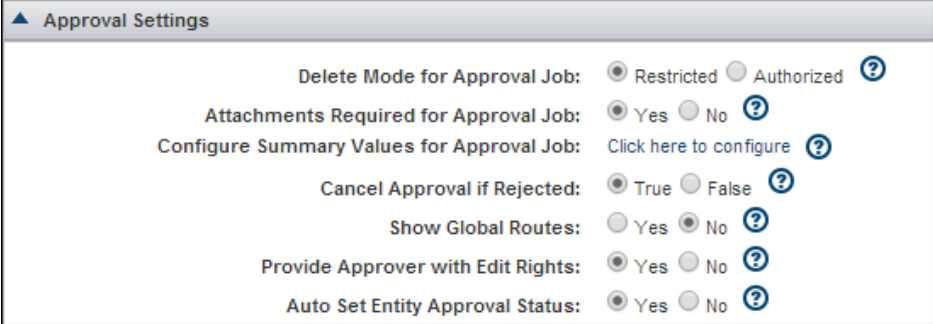
Figure 11.3 Add Translations

Key	English (US)en-US	German.de-DE	Japanese.ja-JP	Korean.ko-KR
PM_Product_Shared	Product			
PM_Products_Shared	Products			
PM_SKU_Shared	Stock Keeping Unit			
PM_SKUs_Shared	Stock Keeping Units			
PM_PACKAGE_Shared	Package			
PM_PACKAGES_Shared	Packages			
PM_PackagingElement_Shared	Packaging Element			
PM_PackagingElements_Shared	Packaging Elements			
PM_ProductComponent_Shared	Product Component			
PM_ProductComponents_Shared	Product Components			
PM_ProductComponentContent_Shared	Product Component Content			
PM_ProductComponentContents_Shared	Product Component Contents			

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

3. Approval Settings: You can initiate approvals at the product, SKU, package and product component levels.

Figure 11.4 Approval Settings



▲ Approval Settings

Delete Mode for Approval Job:  Restricted  Authorized ?

Attachments Required for Approval Job:  Yes  No ?

Configure Summary Values for Approval Job: [Click here to configure](#) ?

Cancel Approval if Rejected:  True  False ?

Show Global Routes:  Yes  No ?

Provide Approver with Edit Rights:  Yes  No ?

Auto Set Entity Approval Status:  Yes  No ?

You can do the following settings for approvals in the Product Information Management system:

Table 11.1 Product Information Management Settings

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

Settings	Expected Values	Explanation
Provide Approver with Edit Rights	Yes or No	If the setting is yes, then the approvers can edit the business entity details during the review. If set to no, the approvers can review and give their approval comments and set a status but cannot edit the information during review. The initiator of the approval can change the information based on the approval comments received.
Auto Set Entity Approval Status	Yes or No	If the setting is yes, the business entity approval status is updated automatically. The status is updated based on the approval job's review status for that business entity. If set to No, the initiator of the approval, sets the status of approval manually for the entity on completion of the approval based on comments received.

4. User Roles: You can set the user roles for access to Product Information Management module. The users and groups selected as authors and readers here and the administrator only will have access to Product Information Management module. The authors and the administrator have complete access to all the levels. They can create, edit and delete. The selected readers have a Read-Only access to all the levels in Product Information Management module.

## Chapter 12

# Customizing Tenants

---

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---

## Overview

SAS Marketing Operations Management settings include account policies, password policies, notification settings, e-mail settings, cataloger settings, and so on, related to the current tenant.

Click **Settings** in the left pane under **Administration** on the Dashboard to view or modify the settings for the tenant. You can specify the tenant settings, holiday management settings, and language-specific settings. The settings explained in this guide apply to the tenant.

---

## Account Policies

*Table 12.1 Account Policies: Settings Related to User Accounts*

Setting	Expected Values	Description
<b>Enable Account locking</b>	Yes or No	To enable the account locking feature when a user account is locked on entering a wrong password.
<b>Allowed login failures</b>	User defined (numeric)	Number of consecutive login failures after which the account is locked.
<b>Allow user to retry login after (Hours)</b>	User defined (numeric)	Number of hours after which the user can try to log in again.
<b>Notify Administrator on Account Lock</b>	Yes or No	Whether to notify the administrator in case a user account is locked.
<b>Notify User on Account Lock or Unlock</b>	Yes or No	Whether to notify the user in case the account is locked.
<b>Password to Unlock Administrator Account</b>	Provide Password	Another administrator password, in case the administrator account is locked.

---

Setting	Expected Values	Description
<b>Enable Remember Me</b>	Yes or No	<p><b>Yes:</b> <b>Remember Me</b> check box appears on the login page.</p> <p>If you click the <b>Remember Me</b> check box, then the system does not prompt the user to enter the credentials while launching SAS Marketing Operations Management following a successful login. The user is redirected to the default solution page.</p>
<b>Forget user on sign out</b>	Yes or No	<p>Whether to remove the user details stored in the cookie on sign out or not.</p> <p><b>Yes:</b> You should provide the credentials for each browser session after sign out.</p> <p><b>No:</b> A message appears and not the login page.</p>
<b>Enable Profile Picture</b>	Yes or No	<p>If you specify Yes, then the user picture will appear in the user profile and in the discussion forum when the user posts comments.</p>

---

## Password Policies

*Table 12.2 Password Policies: Settings Related to the User Account Passwords*

Setting	Expected Values	Description
<b>Minimum Length</b>	A numeric value	Minimum length of the password.
<b>Must have a Special Character</b>	Yes or No	Whether the password must contain a special character.
<b>Must Contain a Digit</b>	Yes or No	Whether the password must contain a digit.
<b>Exclude Login Name, First Name, Last Name from Password</b>	Yes or No	Whether the password must exclude the login, first, last name.

Setting	Expected Values	Description
<b>Enable Password Expiry</b>	Yes or No	Enable or disable the password expiry feature.  <b>Yes:</b> Disables the password after a certain period of time and prompt for the password to be changed.
<b>Expires After (Days)</b>	Any numerical value	If the password expiry is enabled, enter the number of days after which the password expires and has to be changed.

*Note:* Whenever password policies are changed, **Unlock Password** for the administrator is checked to conform to the changed policy.

---

## Notification Settings

**Table 12.3** Notification Settings: Settings Related to the Notifications Sent by the System to the Users

Setting	Expected Values	Description
<b>Notification Retry Interval (Hrs)</b>	24	Time interval in hours after which the system will resend a notification, if the earlier attempts to send were unsuccessful.
<b>Maximum Retry Count</b>	3	Number of times the system attempts to resend the notification in case of failure to deliver.



Setting	Expected Values	Description
<b>Add Calendar Attachments</b>	Yes/No	<p>Tasks assigned to a person from the SAS Marketing Operations Management system are converted to a calendar task so that the task can be set on the users calendar. This setting allows the user to enable or disable the calendar feature.</p> <p><b>Yes:</b> The user will receive a calendar attachment in an e-mail. When the user opens this attachment, an option of saving it in the e-mail client (which supports calendars such as Outlook calendar) as a calendar is provided.</p> <p><i>Note:</i> Currently this feature is available with the Budget Approval e-mails in Strategic Planner only.</p>

---

## E-mail Settings

**Table 12.4** E-mail Settings: Settings Related to the E-mail Server

Setting	Expected Values	Description
<b>SMTP Server</b>	<Machine address> for example, 69.20.48.246 or smtp.emailsrvr.com	IP address or the DNS name of the SMTP server.
<b>SMTP Port</b>	<Port number> for example, 25, 587	Port to be used to connect to the SMTP server.
<b>Mailbox User Name</b>	<User Name>	User name to be used to authenticate against the SMTP server.
<b>Mailbox Password</b>	<Password>	Password to be used to authenticate against the SMTP server.
<b>Mailbox E-mail Address</b>	<Email address> for example, aluser@sas.com	E-mail address of the account used for sending the system notifications.

Setting	Expected Values	Description
<b>Mailbox Display Name</b>	<Display Name> for example, SAS Marketing Operations Management System	Display name of the account used for sending the system notifications.
<b>MailBox Return Path</b>	<Return Path> for example, bouncedmail@sas.com	Mailbox that receives the bounced notifications sent by the system.
<b>MailBox Reply to E-mail Address</b>	<Reply-To Address> for example, support@sas.com	The Reply to address for the e-mail notifications sent by the system.
<b>MailBox Reply to Display Name</b>	<Reply-To Display Name> for example, SAS Marketing Operations Management Support	Display the name for the Reply To account for notifications sent by the system.
<b>MailBox Sender E-mail Address</b>	<From Address> for example, aluser@sas.com	The sender address for the e-mail notifications sent by the system. <i>Note:</i> If this e-mail address is not set, the system will not send out notifications, in some cases.
<b>MailBox Sender Display Name</b>	<From Display Name> or example, SAS Marketing Operations Management System	The display name for the sender account for e-mails sent by the system.
<b>Send all E-mail using MailBox E-mail Address</b>	Yes or No	Whether all the e-mails are to be sent using the mailbox e-mail address.
<b>Authentication Required</b>	Yes or No	If Yes, then credentials are applied while sending the e-mail. If No, then there is no authentication performed against the mail server. <i>Note:</i> Select <b>Yes</b> for this setting and ensure that the password has been provided.
<b>Requires SSL</b>	Yes or No	Specifies whether authentication is required for a secure channel.
<b>Maximum Allowed file size for attachments (In KB)</b>	Numeric	The maximum file size, in kilobytes, that is sent as an attachment in the e-mail.

---

## Cataloger Settings

*Table 12.5 Cataloger Settings: Settings Related to the Cataloger*

Setting	Expected Values	Description
<b>Mount Point</b>	<Folder location or path>	<p>Location of the folder from where the asset for cataloging is picked up by the system.</p> <p><i>Note:</i></p> <ul style="list-style-type: none"><li>• The mount point should be located in a folder other than the tenant folder that is, it can reside within the installation directory but not under the tenant folder. For example, the mount point can be in a folder called Mount Points under D:\SASMOM60. If there is a tenant called MOM do not keep the mount point under it as there is a performance issue associated with this.</li><li>• If a Secondary Cataloger is installed, then provide the mount point for it.</li></ul>

---

Setting	Expected Values	Description
<b>External MountPoint</b>	<Folder location or path>	<p>This is the MountPoint configured for external or third-party users who cannot access the cataloger MountPoint configured within the network. This can be either the physical path or the UNC path, which should be accessible to the DAMJobCopy service.</p> <p><i>Note:</i></p> <ul style="list-style-type: none"> <li>• Provide the external mount point and configure an FTP site for this location. This FTP site is shared with vendors and is treated as an external cataloger mount point for vendors. The vendors are supposed to drop their jobs at this location by following the cataloger job convention. DAMJOBCopy service takes care of transferring these jobs to the actual cataloger mount point.</li> <li>• Install the DAMjobCopy service by running <b>InstallDAMJobCopy Services.bat</b> batch file. This service should be started after saving the tenant configuration for External Mountpoint.</li> <li>• To uninstall this service, run the UninstallDAMJobCopyServices.bat.</li> </ul>
<b>Retry Count</b>	5	Number of times the system will retry to catalog the asset in case of failure during the first attempt.
<b>Retry Interval (Milliseconds)</b>	Numeric field	Time interval in milliseconds between the retry attempts.
<b>Enable Versioning (Digital Asset with same name)</b>	Yes or No	Enable or disable the creation of new versions of an asset.

Setting	Expected Values	Description
<b>Overwrite Business Information during Versioning</b>	Yes or No	Whether to allow overwriting of business information while versioning.
<b>Thread Time Out (Milliseconds)</b>	10000	Time duration in which the thread (connection between the source and destination of cataloging) will time out.

Enter the preview and thumbnail height, weight, depth and the DPI. A default measurement is given, which the administrator can change.

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

---

## Audit Settings

Use the **Log Audits** option to determine the logging of user activities. If you select **Yes**, the user activity will be logged.

---

## Date Calculation Settings

*Table 12.6* Date Calculation Settings: Settings Related to the Dates

Setting	Expected Values	Description
<b>Working Days</b>	5 Days a week or 6 Days a week	Number of working days in a week.
<b>Working Hours</b>	Default value: 8	Number of working hours in a day.
<b>Default duration in days</b>	Default value: 2	Specify the default number of days. This value is used to calculate the duration for a step, which is not preconfigured.

---

## Exchange Rate Settings

*Table 12.7 Exchange Rate Settings*

Setting	Expected Values	Description
Exchange Rate Frequency	Daily, Weekly, Monthly, Quarterly, Half yearly, Yearly	The interval to update the exchange rate for the currencies. By default, it is monthly.
Global Currency Display Name	Currency name (example: USD, Euro, GBP).	Display name for the global currency.
Global Currency Name	The currency used in the country.	This is the default global currency.

---

## Artwork Producer Settings

*Table 12.8 Artwork Producer Settings*

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

---

## Format Watcher Settings

Use the **Format Watcher Mount Point** to specify the location of the folder from where the InDesign format will be selected for creation by the system.

*Note:* The format watcher mount point should be in a folder other than the tenant folder, it can reside within the installation directory but not under the tenant folder. For example, the format watcher mount point should be in a folder called the format watcher mount point under **D:\SAS\MOM60**. If there is a tenant named MOM, do not keep the format watcher mount point under it could lead to performance issues.

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

---

## Default Solution Settings

Use the **Default Solution Page** to see the display of the default solution page when the user logs in to the system.

---

## Digital Library (DAM) Settings

**Table 12.9** Digital Library (DAM) Settings

Setting	Expected Values	Description
Overwrite Links of Asset during Versioning	Yes or No	Whether to overwrite the links of assets during versioning.
Show section asset count	Yes or No	If Yes, then the asset count in the section will be displayed.
Enable Asset Expiry	Yes or No	If Yes, then the asset expiry is enabled. The asset is expired and a watermark appears on the asset when the expiry date is passed.
Send Notification for Asset expiry	Yes or No	If Yes, then a notification is sent to the e-mail IDs configured in the setting below on the expiry or revival of asset. The notification goes out as a reminder 5 days prior to the expiry as well as when the asset expires.

---

Setting	Expected Values	Description
E-mail IDs for Asset Expiry Notification	User e-mail ID separated by commas	E-mail ID of users, who receive the notification on asset expiry or revival.
Support Network Folder	Yes or No	If this setting is Yes, then the file upload and download is done from a configured network folder mentioned below.
Network folder path	This is the path to a configured network folder, for example, \\(machinename\IP address)\(Network folder name)	Create the login name folders for every user under this path. Two folders should be present under each login name - Upload and Download.
XMP Support Required	Yes or No	If the setting is set to Yes, then you can upload assets that carry information within themselves. Information such as copyright information, photography information or the information about the camera on which the image was taken, and so on. Each time an asset is uploaded, different information is stored with it in the Digital Library.
Enable Change Management	Yes or No	Any changes made to the business information of an asset, is tracked. If this setting is Yes, then the changes are tracked. By default it is set to No.
Enable User Rating	Yes or No	Setting the value to Yes enables the User Rating feature in Digital Library, Media Library, and other modules.
Minimum access required to rate assets	Complete, Delete, Create Item, Edit Searchinfo, Create Version, View Original, View Preview or View Thumbnail.	Set the minimum access required to rate an asset.
Inherit Sender's Right in E-mail	Yes or No	If Yes, then the assets sent via the Digital Library E-mail will inherit the sender's access rights. If set to No they will inherit receiver's access rights.



Setting	Expected Values	Description
Send Copy of E-mail to Sender	Yes or No	If Yes, then the user sending out the e-mail will receive a copy of the E-mail by default.
Allow end user to uncheck Copy E-mail to Sender option	Yes or No	If Yes, then a check box is available on the E-mail screen. This enables the user to uncheck the Copy E-mail feature if the sender does not need a copy of the e-mail.
Display Asset details in E-mail	Yes or No	You can choose to display additional asset information along with the asset links. For example, the Asset Name, Vault and Section Path can be added as additional information along with the list of Assets in the E-mail
Allow end user to uncheck Display Asset details in E-mail option	Yes or No	If Yes, then a check box is available on the E-mail screen which can be unchecked if the asset details should need be included the e-mail.

## Approval Settings

**Table 12.10** Approvals Settings

Setting	Expected Values	Description
<b>PDF Annotation Tool</b>	SAS Marketing Operations Management (MOM) Annotations, Adobe Acrobat, or WebDAV	<p><b>SAS Marketing Operations Management (MOM) Annotations:</b> The SAS Marketing Operations Management (MOM) Tool support is available.</p> <p><b>Adobe Acrobat:</b> Adobe Acrobat for PDF files is used.</p> <p><b>WebDAV - WebDAV:</b> support is available for Approvals module.</p>

Setting	Expected Values	Description
<b>Action on file conversion failure</b>	Cancel or Adobe Acrobat	In case of SAS Marketing Operations Management (MOM) Annotations, the file that is uploaded is converted to .swf. For some reason the conversion fails, specify the following settings: <ul style="list-style-type: none"> <li>• <b>Cancel:</b> In case of failure, the job is canceled.</li> <li>• <b>Adobe Acrobat:</b> In case of failure, the job is converted to a standard job where the file is downloaded. After downloading the file, enter comments and upload it back into the system</li> </ul>
<b>Auto Login for E-mail</b>	Yes or No	Whether the user needs to log in when viewing an e-mail received by the user.
<b>Solution Display Name</b>	User defined	

*Note:* If any changes are made to the **WebDAV required** setting, restart WebDAV service.

---

## Import Invoice Settings

*Table 12.11 Import Invoice Settings*

Setting	Expected Values	Description
<b>Invoice MountPoint</b>	User defined	Path where the invoice xml is loaded for processing.
<b>Archive File Path</b>	User defined	Path where the imported invoice files are archived after processing.
<b>Send Notification for Imported Invoices</b>	Yes or No	If this setting is set to Yes, then a notification is sent to all the users selected below for all the processed files.

Setting	Expected Values	Description
<b>E-mail IDs for Imported Invoice Notification</b>	User defined	E-mail IDs of the users who should receive the notification. In case of multiple users, enter comma separated e-mail IDs.

---

## Back-Office Settings

Use the **Maximum Number of Delay Notifications** option to specify a value, which indicates that after the specified number of reminders, the contributor does not receive notifications for the delayed tasks.

---

## Concurrent Login Settings

Use the **Allow Concurrent Logins** option to specify whether the user is allowed to use concurrent logins on other browsers or on different machines.

---

## My Calendars Settings

Use the **Start Day of the Week** setting to specify the start day of the week for the tenant.

---

## Product Information Management Settings

Use the **Enable Product Information Management** option to specify whether the Product Information Management module is visible to the administrator as well as the end user.

---

## Claims Management Settings

**Table 12.12** Claims Management Settings

Setting	Expected Values	Description
<b>Enable Claims Management</b>	Yes or No	If this is set to Yes, then the rest of the settings are visible and the Claims Management link is visible on the left pane of the Dashboard screen.
<b>Show Claims Tab in Digital Library (DAM)</b>	Yes or No	If this setting is set to Yes, then a Claims tab is visible in the Asset information in Digital Library (DAM).
<b>Enable Labels</b>	Yes or No	If this setting is set to Yes, then a Labels link is visible in the Claims Management module.
<b>Show Labels Tab in Digital Library (DAM)</b>	Yes or No	If this setting is set to Yes, then a Labels tab is visible in the Asset information in Digital Library (DAM).

---

## User and Vendor Selection

Use the **Enable character wise search** setting to enable or disable character wise search on the user and vendor selection pages. It is used to disable the character wise search for languages that do not support the English character set.

Click **Save** at the bottom of the Settings screen to save the changes made.

---

## Holiday Management

### Overview

Click **Holiday Management** link on the left pane. The following two links are visible:

1. **Standard Holidays:** A View Standard Holidays screen appears by default. You can search for the holidays by selecting the dates (to and from) and selecting the country and clicking Search. You can delete a selected holiday, create a new holiday and copy standard holidays. To create a new holiday, click **New** and enter the country,

dates and the reason for the holiday. To copy a holiday to the next fiscal year, click **Copy standard holidays**. Select the year to which the holiday is to be copied.

2. **Weekends:** Click **Weekends** on the left pane. A View Weekends screen appears where the weekends for a country are displayed.

To search for weekends by selecting the country, click **Search**.

To delete a selected weekend, click **Delete**.

To add new weekends, click **New**. An Add New Weekend popup appears, where the country and the weekday needs to be selected.

To save the weekend, click **Save**.

---

## Language Specific Settings

You can do language-specific setting for the user format. Languages supported are English, German, Japanese, and Korean. You can select different formats for different languages.



## Chapter 13

# Setting Up Digital Asset Finder

---



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---

## Overview

Digital Library provides the facility to store assets along with their business information in vaults and folder hierarchy. Sometimes it is difficult to drill down the hierarchy and search for the assets. A Digital Asset Finder (DAF) is a pre-configured search for assets that you want displayed on the left task pane of SAS Marketing Operations Management system. It allows the administrator to create a predefined search configuration to facilitate searches on Digital Library for retrieval of assets. You can embed these predefined configurations in solutions such as Site Builder, where the user can search by providing keywords to search and retrieve assets which specify certain criteria.

## Getting Started

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

To create new queries click **Create**. To delete a selected query click **Delete**.

## Creating a Digital Asset Finder (DAF) Query

To create a new digital asset query, click **Create**. A screen with the following sections appears:

Figure 13.1 Digital Asset Finder Configuration

Digital Asset Finder Configuration

Configuration Details

Name: Brand Image

Description:

Type of field display: Simultaneous

Include Text Search:  Yes  No

Criteria Builder

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

Target Entity	Related Entities	Related Facets
<input type="checkbox"/> Frozen On <input type="checkbox"/> Marked for Deletion <input type="checkbox"/> Download Count <input type="checkbox"/> Last Version Date <input type="checkbox"/> ISCHILD <input type="checkbox"/> HASCHILD <input type="checkbox"/> Asset Expired <input type="checkbox"/> Expiry Date <input type="checkbox"/> Average Rating <input type="checkbox"/> Total Rating <input type="checkbox"/> Number of Ratings	<input type="checkbox"/> Digital Asset Frozen By <input type="checkbox"/> DigitalAsset_LinkAsset <input type="checkbox"/> Digital Asset Locked By <input type="checkbox"/> Digital Asset Rating Information <input type="checkbox"/> Digital Asset Revived By <input type="checkbox"/> Digital Asset Topic <input type="checkbox"/> Text Element Value association with Digital Asset <input type="checkbox"/> Activity Asset References <input type="checkbox"/> Activity Digital Assets <input type="checkbox"/> Linked Digital Assets with Activity <input type="checkbox"/> Artwork Digital Asset <input type="checkbox"/> Artwork High-Res Asset	<input type="checkbox"/> Related Facets <input type="checkbox"/> JD Demo <input type="checkbox"/> DAM_Signlist <input type="checkbox"/> Test <input type="checkbox"/> DIGITALASSET_ASSETTYPEINFO <input type="checkbox"/> Image bank Information <input type="checkbox"/> DIGITALASSET_MOM_DEMO <input type="checkbox"/> DIGITALASSET_MOM_FACET <input type="checkbox"/> PROMOTIONAL_ASSET <input type="checkbox"/> Tag Taxonomy association with Digital Asset <input type="checkbox"/> DIGITALASSET_TREEVIEW <input type="checkbox"/> Digital Asset_XMP Information

Define Filters (optional)

Select Input Fields

Group Un Group Insert Group Edit Delete Move Up Move Down

Digital Asset Name Contains SAS

Target Entity Related Entities Related Facets

Save Cancel

Configuration Details:

1. **Name and Description:** The configuration name and description.
2. **Type of field display:** Select whether the display of the fields is sequential or simultaneous.
3. **Include Text Search:** Select whether to include a text search.
4. **Criteria Builder:** The criteria for displaying assets with information is built using the Target Entity, Related Entity and Related Facets. The following can be defined:
  - a. **Define Filters:** Specify the default search filter which is applied along with the search criteria, specified during run time by the end user. Drag and drop the filter and select the operator and the filter value. To delete a filter, select it and click **Delete**. To clear all the filters from this section click **Clear All**. To add the expired assets from the digital library, add an additional filter.
  - b. **Select Input Fields:** Select the attributes or fields, which the end user can specify keywords for searching for the digital assets. Drag and drop the filter and enter the display name. To delete a filter, select it and click **Delete**. To clear all the filters from this section click **Clear All**. To add the expired assets from the digital library, add an additional filter.

To save the configuration, click **Save**.

## Configuring an Application

You can configure an application for which a link is available on the left pane of the Dashboard screen by clicking **Configure Application**. A list of configured applications is displayed.

To create a new application click **Create**. An Application Definition screen with the following sections appear :



Figure 13.2 Application Definition

**Application Definition**

\*Application name:   
 Description:

Publish application in leftbar:

**DAF Configuration**

\* Select DAF:    
 Select operations:  Download  Delete  Generate Catalogue  Asset Metadata

Allow upload of digital assets?

**Set access control for application**

**Grant privileges for Everyone**

Everyone

**Grant privileges for groups**

Group Name:   Privilege:

Group Name	Privilege
+ <input type="checkbox"/> Marketing Manager	Read Access

**Grant privileges for users**

User Name:   Privilege:

User Name	Privilege
There are no users to show	

Do the following configuration:

1. **Application Name and Description:** Enter the configuration name and description.
2. **Publish application in leftbar:** Select this setting for the configured application to be visible in the left pane of the Dashboard screen.

If the Digital Asset Finder (DAF) Configuration is selected, then do the following settings:

1. **Select Digital Asset Finder (DAF):** Select the digital asset finder query created in the system. You can create a new query by clicking **Configure DAF**.
2. **Select Operations:** Select the options of download, delete, generate catalog and asset metadata operations. The selected options are available to the end user.
3. **Layout:** Specify how the digital assets are displayed by default.

If the Allow upload of digital assets option is selected, then the user can upload assets. The following section is visible on the Application Definition screen:

- **Select facet:** You can associate metadata to an asset by selecting a facet. When you select a facet, you can configure a form by clicking **Configure form**. This will add the new facet field to the existing form.

Forms for the Digital Asset Finder facets are completely different to the Digital Library forms. They are not related to each other. In Digital Asset Finder there is one form where all the facets fields are present. Digital Asset Finder is used to populate the data in Digital Library. The representation of data in the Digital Library is done

with respect to the Digital Library solution. The forms will appear in a different format as it does not check from where the data is uploaded.

- **Select target section for uploading assets:** Select a fixed path for uploading assets. This allows a fixed path (chosen section) for cataloging and also allows constructing a variable location based on the metadata information selected for the asset.

**Figure 13.3** Allow Upload of Digital Assets

Allow upload of digital assets?

Select facet: JD\_DEMO ▼ Select

Facet type name	Description	Is Mandatory
<input type="checkbox"/> JD_DEMO		Yes

Note: Mandatory facets can not be removed.

Delete Configure form

Select target section for uploading assets

\* Fixed path: ImageBank Select

Variable path field name Navigation path

No variable path sections found.

Delete Add

Final target section: ImageBank

Set access control for applications as follows:

1. **Grant privileges for everyone:** Select the options from the drop-down list.
2. **Grant privileges for groups:** Select the groups and grant them privileges.
3. **Grant privileges for users:** Select the users and grant them privileges.

To save the new application configuration, click **Save**.

## Chapter 14

# Configuring Reports

---

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---

## Getting Started

On successful login, click **Reports Configuration** link on the left pane under **Administration**. By default, the Strategic Planner reports are displayed.

On the left pane, click the respective links to view the list of reports for each solution.

---

## Updating and Viewing Reports

Each row in the list displays a report name and description. The following actions can be performed on each report:

1. **View:** Click **View** to launch the report filter screen. The administrator can specify filter criteria for the data which is displayed on the report.

Click **Generate** after selecting the filter criteria to display the report.

The report can be exported to PDF and Excel.

2. **Edit:** On the Report Configuration screen, click **Edit** next to the report name. On the Update Configured Report screen, you can grant privileges to groups and users. Specify the following access:

- **Grant privileges for everyone:** Specify read or no access for everyone.
- **Grant privileges for groups or users:** Select the groups or users. Select the privileges such as deny access, no access, or Read access. If deny access is selected, then, if the user or group has access by other entries the deny access will override it.



## Chapter 15

# Configuring the Leftbar

---

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---

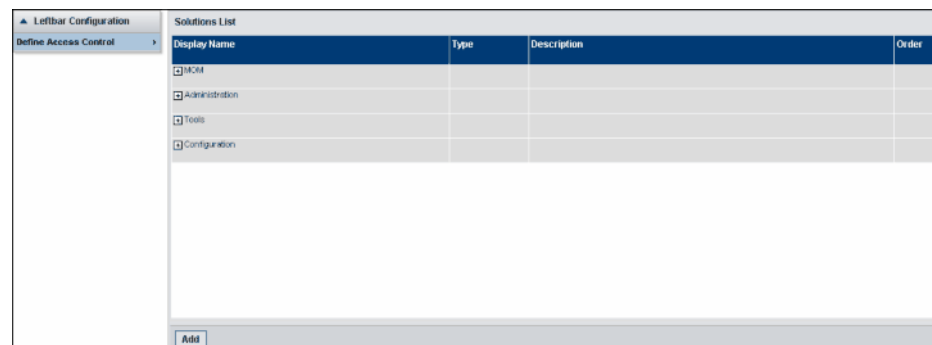
## Overview

You can set up access control on various solutions within the SAS Marketing Operations Management solution. The end-user access to the solutions is controlled using this tool. You can deny access to certain modules for certain users or groups within the system.

## Getting Started

Click **Leftbar Configuration** in the left pane of the Dashboard screen under Administration. A list of solutions configured to appear on the left pane are displayed.

**Figure 15.1** Solution List



Display Name	Type	Description	Order
Home			
Administration			
Tools			
Configuration			

Each row in the list displays the name, type, description and the order of the solution. Set the access control for these solutions by clicking the associated links. The standard solutions are divided in four parts. Expand to display the following solutions or pages under them:

- SAS Marketing Operations Management (MOM): Solutions such as dashboard, calendars, strategic planner, offer management, marketing workbench, resource planner, approvals, product information management, digital library, claims management, knowledge manager, site builder, artwork producer, timesheets and reports are displayed in the list.
- Administration: Solutions such as user management, user registration, dashboard admin, calendar admin, strategic planner admin, offer management admin, workbench admin, resource management admin, settings, digital asset finder, reports configuration, leftbar configuration and the object ID series are displayed in the list.
- Tools: Pages such as vendor management appear in the list.
- Configuration: Solutions such as schema designer, process designer and UI framework are displayed in the list.

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

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

---

## Configuring Leftbar

### *Adding New Solutions to the Leftbar*

Click **Add** on the solutions list screen to add new solutions on the left pane. An Add Solution screen with the following sections appears:

- Solution Details: In this section enter the solution name, display name, the application URL (starting with http:// or https ://) and the description. Select what type of application it is.
- Standard Parameters: Select the standard parameters individually or all. The parameters are user ID, session ID, tenant name and language.
- Grant Privileges for Everyone: Everyone, that is all the users of the system could get no access or a Read-Only access.
- Grant Privileges for Groups: Select the privileges such as deny access, no access or Read access. If the group has **Deny Access**, then even if the group has access by other entries the deny access can override it. The selected groups are seen in the section below. Similar privileges can be given to an individual user.

Click **Save** to save the solution attributes and the access control definitions.

Figure 15.2 Add Solution

**Add Solution**

\* Solution Name:

\* Display Name:

\* Application URL:  (Please enter URL starting with http:// or https://)

Description:

Application type:  External Application

▲ Standard Parameters

Select All:

UserID  SessionID

Tenant Name  Language

▲ Grant privileges for Everyone

Everyone:

▲ Grant privileges for groups

Group Name:   Privilege:

Groups

Group Name	Privilege
There are no groups to show	

▲ Grant privileges for users

User Name:   Privilege:

Users

User Name	Privilege
There are no users to show	

### Editing and Specifying Access Control for the Solutions

The solution attributes and the access control of the solutions under SAS Marketing Operations Management (MOM) can be edited by clicking the solution name link. An Add Solution screen appears. You can enter details similar to the Add Solution screen above except that the solution name is in a read-only form and cannot be edited. You can edit the access control. Save the changes made by clicking **Save**.

Figure 15.3 Configure Access Control

Configure Access Control For -> Dashboard

Solution Name: Dashboard  
 Display Name: Dashboard  
 \* Application URL:  (Please enter URL starting with http:// or https://)  
 Description:

Application type:  External Application

▲ Grant privileges for Everyone  
 Everyone:

▲ Grant privileges for groups  
 Group Name:   Privilege:

Groups

<input type="checkbox"/> Group Name	Privilege
<input type="checkbox"/> Edit Suites	No Access

▲ Grant privileges for users  
 User Name:   Privilege:

Users

<input type="checkbox"/> User Name	Privilege
There are no users to show	

You can configure the pages of some solutions to allow or deny access to specific users and groups. The Strategic Planner, Marketing Workbench, Digital Library and Artwork Producer pages can be configured via the left bar configuration utility.



## Chapter 16

# Setting Up Object ID Series

---

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---

## Overview

In the SAS Marketing Operations Management system, you can configure objects series for use in the application. An example is the ACTIVITYNUMBER series that is available in the system. You can configure this number to be automated. The activity number series appears in the Strategic Planner module when you create a new activity.

## Getting Started

Configure the series by clicking **Object ID Series** link on the left pane under the administration menu.

A list of Object ID series used in the system is displayed. Details such as the object ID series name, prefix, next number, initial value and maximum value are displayed. You can edit the object ID series by clicking the name link.

**Figure 16.1** Object ID Series

Object ID Series Name	Prefix	Next Number	Initial Value	Maximum Value
BATCHURGATEJOB		1006	1000	1000000000
BriefUniqueID_Series		1003	1000	1000000000
CAMPCODE		1000	1000	1000000000
Commitment Series		1000	1000	1000000000
DeliverableUniqueID_Series		1025	1000	1000000000
ESTIMATENUMBER		1002	1000	1000000000
Invoice Series		1000	1000	1000000000
OFFERCODENUMBER		1000	1000	1000000000
ProjectUniqueID_Series		1022	1000	1000000000
SgrCode_Series		10001	10001	1000000000
TaskUniqueID_Series		1181	1000	1000000000
TREATMENTCODE		1000	1000	1000000000
VENDORNUMBER		1001	1000	1000000000
WORKITEMNUMBER		1000	1000	1000000000

Add new object ID series by clicking **Add**. An Object ID Series screen appears.

Enter the following details:

1. **Object ID Series name:** The name for the object ID series.
2. **Prefix:** The prefix appears before the number for the series.
3. **Delimiter:** The delimiter is a separator between the prefix and the number, for example, if prefix is *Com*, the delimiter is # and the number is 10, then the auto-generated number is **Com#10**.
4. **Initial Value:** The initial value of this series.
5. **Increment by:** The value increases by the number specified for this series, for example, the commitment number begins with 1000, so the next commitment number increases by 1, that is 1001.
6. **Maximum Value:** The maximum value the number can reach. It cannot be greater than 1000000000.
7. **Maximum Number of Digits:** This specifies the maximum number of digits the maximum value can reach. This value should not be greater than 10.
8. **Reset Rule:** You can configure the reset value to be the initial value or zero.

**Figure 16.2** Create Object ID Series

The screenshot shows a dialog box titled "Object ID Series". It contains the following fields and values:

- Object ID Series Name:** Activity Number
- Prefix:** AN
- Delimiter:** -
- Next Number:** (label only)
- Initial Value:** 1000
- Increment by:** 1
- Maximum Value:** 100000
- Maximum Number of Digits:** 6
- Reset Rule:** Initial Value

At the bottom of the dialog are "Save" and "Cancel" buttons.

Once the Object ID series is created, you can configure it to appear on a form. Go to the UI Framework module, to the specific form where this Object ID series should appear.

## Chapter 17

# Configuring Routes

---

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---

## Route Configuration

### Overview

You can use the routes created using this tool in the Approvals and the Marketing Workbench modules. If the setting for **Show Global Routes** is set to yes in the approvals and workbench administration utility, then the routes created are visible. The administrator of the system creates the routes which are visible to all the users of the system.

### Getting Started

Click **Routes Configuration** link on the left pane under Administration. A View Global Routes screen with the existing routes appears .

You can edit the existing route by clicking the route name. Create a new route by clicking **Create Route**. A Create Route screen appears.

Enter the following information:

1. **Route Name and Description:** The name and the description for the route.
2. **Step Title:** Enter a Title for every step.
3. **Group or Resource Category:** Select the groups or the resource categories who are part of this route. When a resource category is selected you cannot select the contributor as the resource category head will allocate the resource when the request is sent.
4. **Contributors:** Select the individual users. When a group is specified, you can select the users belonging to that group only. If all users is specified, then you can select from all the users of the system.
5. **Cancel Approval if Rejected:** If this box is selected against each contributor, then the approval job or workbench task is canceled if this particular contributor rejects the job or task.

6. **Duration:** Specify the duration in days for the job or task against each contributor. Specify the number of hours the contributor should work for the number of days specified.
7. **Instructions for Contributor or Instructions for Resource Category Head:** Give instructions for each contributor. If a resource category is selected, you can give instruction to the resource category head.

Save the route by clicking **Save Route**.

**Figure 17.1** Create a Route

Route Name: Marketing and Sales Route  
 Description:

Step Title	Group/Resource Category	Contributors	Cancel Approval if Rejected*	Duration (days)	Hours	Instructions for Contributor	Instructions for Resource Category Head
	Administrators	John Lewis	<input type="checkbox"/>		16.00		
	Creative		<input type="checkbox"/>		16.00		
	Complete Access Group	Jane Kelley	<input type="checkbox"/>		16.00		
	Complete Access Group	Jessie Kane	<input type="checkbox"/>		16.00		

Delete | Add Contributors

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

Save Route | Cancel

## Chapter 18

# Configuring Data Transfer

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---

## Data Transfer Configuration

The administrator can configure a Data Transfer using the **Data Transfer Configuration** utility. You can transfer data from and to the following:

1. A Brief to a Project and Deliverable.
2. A Deliverable to a Digital Asset.
3. A Format to an Artwork.
4. A Book type to a Book.
5. An Artwork to a Digital Asset.
6. A Book to a Digital Asset.

---

## Getting Started

Click **Data Transfer Configuration** link in the left pane under Administration. A list of existing configurations is displayed.

To create a data transfer configuration click **Create Configuration**.

Enter the name for the configuration and select the following:

1. **Source Object**: Select the source object from the drop-down list from where the data is selected for transfer.
2. **Destination Object**: Select the destination object from the drop-down list, where the data is transferred.

**Figure 18.1** Create New Data Transfer Configuration

Create New Data Transfer Configuration

\*Name:

\*Source Object:

\*Destination Object:

Click **Next**. Select the fields that you want to transfer and save it by clicking **Done**.

A Data Transfer Configuration screen appears. Do the mapping of the source fields to the destination fields by clicking **Select**. Select the fields where the data is transferred to. Select when the data transfer should happen. You can add more fields, group fields or facet series can delete them. You can add references to the configuration.

**Figure 18.2** Data Transfer Configuration

Data Transfer Configuration

Source Object: Brief (Promotional Brief)  
Destination Object: Deliverable (Artwork)

Legend:

- Entity Name
- Relationship Name
- Facet Series Object Name
- Reference Object
- Field Name

Field List

Field Name	Deliverable Fields	Data Type	Data transfer while creating Deliverable	Data transfer while saving Brief
BREF - ATTACHMENTS	WORKFLOWPROCESS - ATTACHMENTS	BINDER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Chapter 19

# Importing Data

---

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---

## Import Data

You can import the following data using the provided excel templates:

1. **For Strategic Planner:** Plans, campaigns, activities and offers with their facets and attachments. The expense, budgets, scorecards and user information are not imported.
2. **For Digital Library:** Sections hierarchy.
3. **For Claims:** Claims and label information.

*Note:* To view the errors or warning details, click the job title link of the file whose status shows errors or warnings. You can then correct the errors in the excel sheet and re-import it.

Click **Import Data** link in the left pane under Administration. By default An Import Plan screen appears.

---

## Getting Started

### *Strategic Planner*

#### **Import Plans**

You can do the following actions:

- **Import Plans:**
  - **Sample File:** Click the link to download the sample file for the plan hierarchy.
  - **Import File:** Enter the plan details in the sample file and upload it here.

- **Attachments:** You can upload reference files.
- **Search:** You can search for the jobs imported in the system using the fields date created and the filename.
- **Job List:** The list of the jobs created in the system appears with details such as job title, status (whether completed, completed with errors, failed, new or in-progress), type and created on.

The Excel sheet downloaded by the user contains multiple sheets which the user needs to populate with relevant data. The first sheet has the instructions.

The following sheets are present:

- **Plan:** On this sheet enter the following fields:
  - **Plan ID:** This is a Numeric field and is a unique ID. If it is set to be auto generated, then this field does not need to be populated.
  - **Plan Title and Description:** This is a string field. Enter the name and description of the plan.
  - **Business Unit:** This is a mandatory field. You need to configure business units in the system before populating this field in the excel sheet.
  - **Currency:** This is a numeric field.
  - **Fiscal Year:** If the setting for fiscal year is set to True, then enter information for this field.
  - **Start and End Dates:** If the setting for fiscal year is set to False, then enter the start and end dates for the plan.
- **MA Level 1, 2, 3, 4 or 5:** On these sheets the following fields are present:
  - **Parent or Plan ID:** This is a numeric field and is a unique ID. Enter the Parent ID to map the plan and the activities.
  - **Title:** This is a string field and a mandatory field.
  - **Exclude from Calendar:** This is a mandatory field.

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

- **Plan Details Facet or Marketing Activity (MA) Details Facet:** To associate facets to the plans and activities, please contact Technical Support as you need to make changes in the XML files.
- **Attachments:** On this sheet the following fields are present:
  - **Filename:** This is the name of the file which is an attachment.
  - **Sheet Name:** This is the name of the sheet for which the attachment is.
  - **Type ID:** This is ID of the plan or activity, and so on, for which the attachment is.
  - **Field Names:** This field name for which this attachment is.

### **Import Offers**

Similar to Import Plans, you can import offers into the system using this utility. The sample excel sheet is available, which you can download and fill in with the relevant data and upload in the system by clicking **Upload**.



## Digital Library

Click **Digital Library** link on the left pane, an Import Sections screen appears. There is a link to download the template in the form of an excel file. You can fill in the section hierarchy. In the first sheet enter the sections with the path and the security policy for the section. The second sheet has the instructions. You should create the vaults and the security policy before the sections are created using the excel.

After filling the section hierarchy with the path and the security policy to be applied to each section in the template, upload it by clicking **Select File**. Click **Submit**. This utility creates the sections hierarchy.

## Claims Management

You can import the claim and label information in the system using the Import Data utility.

An Import Claims screen appears where a sample file is provided. Enter the claim details in the excel sheet provided. Download the file, enter the data and upload it into the system by clicking **Upload**.

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

*Note:* If Claims or Labels are imported without the ID mentioned in the excel, you need to make changes in the configuration XML for claims management.

Modify the configuration xml located at **ImportData\Configuration\XML\Entity\_Import\_Configuration.xml** as follows:

In the `<IMPORTDETAILS Name="CLAIM">` node add `IsImportWithoutIDs="true"`  
`DummyPKFieldName="CLAIMID"`.

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

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

*Note:* The above configuration, allows import without the IDs, but Claims or Labels ID is required to match with the facet row in the other sheets. The claims or label ID should be numeric if added.



## Chapter 20

# Configuring Web Services

---

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## Overview

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

---

## Registering WSDLs

Click **Web Service Configuration** link on the left pane under the Administration menu. A view WSDL's screen is displayed with an existing list of registered WSDLs. You can register the WSDLs (Web Services Description Language) using the register WSDLs utility.

To register a new WSDL, click **Register WSDL** and enter the following details about the register WSDL screen:

1. **WSDL Title and Description:** Name and the description for the WSDL.
2. **Location:** Location from where the web service is accessed during the invocation of the web methods. Enter the full path beginning with HTTP:// or HTTPS://.
3. **Web Service Protocol:** The protocol is SOAP, as only SOAP is supported.
4. **Time Out:** Enter the time in milliseconds.
5. **Anonymous Access Allowed:** Authorization used for calling the web methods. If no is selected, then enter the following details:
  - **Credentials:** Enter the user name, parameter name for user name and the password. If the credentials allowed in SOAP header is yes, then enter the parameter name for the password. If no, then enter only the password.

6. **WSS Profile:** Indicates whether the web services security is enabled. If yes is selected, then enter the subject name of the certificate to use and the DNS of the certificate.
7. **Upload WSDL:** Browse to a folder location and upload a file.

To save the WSDL, click **Save**.

To edit or view an existing WSDL, click the WSDL name link on the view WSDL's screen. A register WSDL screen is displayed with the WSDL details. A tree view of the selected web services is displayed.

To export a WSDL, click **Export WSDL**.

---

## Web Service List

Click **Web Service List** link on the left pane, a list of configured web services are displayed. To edit a web service, click on the name link. To import a web service, click **Import**.

Click **Create** and select the web service from the configured list. Enter the web service information.

## Chapter 21

# Integration Toolkit

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## Integration Toolkit

SAS Marketing Operations Management includes a fully automated configuration utility or Integration Toolkit. You can use this toolkit for the integration of SAS Marketing Operations Management with SAS Marketing Automation and SAS Digital Marketing. This toolkit is a one click configuration utility. Any user with administrative rights can run the integration toolkit. Run the toolkit from the left pane under Administration.

### What does this Toolkit Configure?

1. Web Service Configuration to link SAS Marketing Operations Management and SAS Marketing Automation.
2. Installation and configuration of process definitions, forms and files necessary to make the integration work.

Only the administrator can set up the integration. After logging on to the system click **Integration Toolkit** link on the left pane under the Administration section.

---

## How to Apply the Integration?

### **SAS Marketing Operations Management and SAS Marketing Automation**

By default the Register WSDL screen for SAS Marketing Automation Integration appears. Enter the following WSDL details for registering the integration:

- **WSDL Title and Description:** The WSDL title is *QuickStart wsdl*. The description can be user defined.

- **Location:** This field indicates the location from where the web service is accessed during the invocation of the web methods, for example, `http://01.02.03.04/MAMOMIntegration/Services/CIMAIntService Soap`
- **Web Service Protocol:** This field indicates the protocol used to communicate with the web service. We support only *SOAP*.
- **Time Out (milliseconds):** Enter the time (in milliseconds).
- **Anonymous Access Allowed:** This field indicates the user context used for calling the web methods.

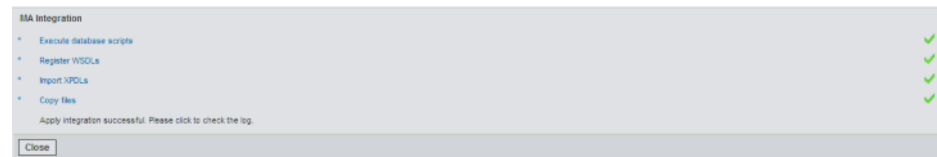
After entering the details click **Next**.

The following checks are done:

1. Executing the database scripts.
2. Registering the WSDLs.
3. Importing the XPDLs.
4. Copying the files and forms.

Once the integration is applied successfully, check the logs by clicking **Apply integration successful. Please click to check the log** link. If there is an error while applying the integration, you can cancel it and restart after checking the error logs.

**Figure 21.1** Checks



After the integration is completed, go to Process Designer module to check if the **Direct Marketing Project** is created. Check the related deliverables and tasks to ensure that the integration is completed.

## **Setup and Configuration for the Integration of SAS Marketing Operations Management with SAS Digital Marketing**

### **Setting the External Web Server Details in the Configuration File**

When the Integration toolkit for SAS Marketing Operations Management with SAS Digital Marketing is executed for the first time, the following settings are required:

Figure 21.2 SAS Digital Marketing Integration

SAS Digital Marketing Integration

External Web Server Settings

\* Protocol: http

\* Server Name or IP Address: http://01.02.03.04

\* Virtual Directory: CopyArtworkToWebServer

\* Is Server on the Same Network: Yes

\* UNC Path of Server: \\example\public

Save Configuration

Configuration is in-progress

- Execute Database Scripts
- Configure data transfer for Format to Artwork
- Copy Form XMLs

Close

**External web server settings:** These settings are required to identify the web server in the integration setup that holds the images that are included in the e-mail. The images are downloaded from this server when an e-mail recipient opens an e-mail sent via SAS Digital Marketing or requests for downloading images in the e-mail.

- **Protocol:** Select http or https. This is required for preparing the Image Path for the generated artwork, which is pushed on the external web server when a broadcast is executed or a preview e-mail is sent from SAS Digital Marketing.
- **Server Name or IP Address:** Enter the name or the IP of the external web server where the final artwork and images are copied when a broadcast is executed or a preview e-mail is sent from SAS Digital Marketing.
- **Virtual Directory:** Enter the Virtual Directory location. This is required for preparing the Image Path for the generated artwork. Graphics element images included in the e-mail broadcasts are present under this virtual directory
- **Is Server on the Same Network:** Indicate whether the web server machine is on the same network as the SAS Marketing Operations Management installation or a different network.
- **UNC Path of Server:** This is required only if the web server is on the same network as the SAS Marketing Operations Management installation. Enter the Target Path where the artwork and images are copied.

*Note:*

- UNC path should be the same folder as the folder to which the virtual directory refers or points to.
- If the external web server is not on same network, system uses one web service to transfer the files from SAS Marketing Operations Management solution server to the external web server. Copy the **IntegrationMTOM folder** located in **SAS Marketing Operations Management <Installation folder>** ⇒ **Integration** ⇒ **Integration MTOM** onto the external web server and then create a virtual directory *IntegrationMTOM* pointing to this copied folder.
- You can update the above information even after running the utility. You can edit the configuration by clicking **Edit Configuration** to change the value for the external web server attributes.

After saving the above settings, the following changes occur automatically in the SAS Marketing Operations Management system:

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

### **Data Transfer Configuration Changes for Artwork Format**

When the data transfer configuration is set by the utility, a new data transfer configuration (FORMAT\_ARTWORK) is created to transfer the data from FORMAT to the 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)
```

After the above records are inserted in the database successfully, the **CONFIGXML.xml** file is copied under the XML mount point location.

However, if the data transfer configuration already exists with the same name, a warning message is shown to the user. In this case, the data transfer configuration should be modified manually by going to the **Data Transfer Configuration**.



Figure 21.3 Data Transfer Configuration

Name	Source Object	Destination Object
<input type="checkbox"/> DT from "Promotional Artwork" to DAM	Deliverable	Digital Asset
<input type="checkbox"/> DT from "Promotional Brief" to "Promotional Project"	Brief	Project
<input type="checkbox"/> DT From "Promotional Brief" to "Promotional Artwork"	Brief	Deliverable
<input checked="" type="checkbox"/> FORMAT_ARTWORK	Format	Artwork

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

Figure 21.4 Mapping between the Format and Artwork Fields

Format Fields	Artwork Fields	Data Type	Data transfer while creating Artwork
<input type="checkbox"/> FORMAT - FORMATDESCRIPTION	ARTWORK - ARTWORKDESCRIPTION	STRING	<input checked="" type="checkbox"/>
<input type="checkbox"/> FORMAT - FORMAT_FORMATINFO - TEXTCONTENT	ARTWORK - ARTWORK_ARTWORKINFO - TEXTCONTENT	TEXT	<input checked="" type="checkbox"/>
<input type="checkbox"/> FORMAT - FORMAT_FORMATINFO - ITEXTCONTENTEDITABLE	ARTWORK - ARTWORK_ARTWORKINFO - ITEXTCONTENTEDITABLE	BOOLEAN	<input checked="" type="checkbox"/>

**Format Details Form Changes for Artwork Producer with New Content Type Fields**

The format details form is updated with the fields related to the content type. The following new fields are added within the Format Designer of Artwork Producer:

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

**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.

Figure 21.5 Form List

Form Name	
Campaign_Details	Campaign Details
ROCampaign	Campaign
DesignDetails	Design Details
RODesign	Design
HTML_FormatDetails	Format Details
HTML_NONRESIZABLE_ROFormat	Format
READYTOUSE_FormatDetails	Format Details
READYTOUSE_NONRESIZABLE_ROFormat	Format
INDESIGN_FormatDetails	Format Details
INDESIGN_NONRESIZABLE_ROFormat	Format
Book_Details	Book Details
BookType_Details	Book Type Details
Integration_HTML_NonResizable_Artwork_Details	Artwork Details



## Chapter 22

# Customizing the Schema

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## Schema Designer

### Overview

An entity type represents an entity involved in a real world business process. Entity type is one of the standard objects that are provided by the object manager. This indicates the type of entity to which the entity instance belongs. The definition of an entity type includes the definition of the database table where the instances of this entity type are stored.

The business or additional information that is associated with an entity is termed as a **Facet**. The facet type defines a type of business information, for example, you can consider an Asset, Brand Info, Product Info as Facet Type.

Definition of Facet Type includes the definition of the database table where the instances of this facet type are stored.

The Schema Designer solution allows the administrator to manage entity type, facet type and the relationship between them. Here are the list of restrictions:

**Table 22.1** Object Types

Object Type	Operations		
	Create	Modify	Delete
Entity Type (Built-in)	Not Allowed	Not Allowed	Not Allowed

---

Object Type	Operations		
	Create	Modify	Delete
<b>Entity Type</b> (User defined)	Not Allowed	Not Allowed	Not Allowed
<b>Facet Type</b> (Built-in)	Not Allowed	Not Allowed	Not Allowed
<b>Facet Type</b> (User defined)	Allowed	Allowed	Allowed
<b>Named Hierarchy</b> (Built-in)	Not Allowed	Allowed	Not Allowed
<b>Named Hierarchy</b> (User defined)	Allowed	Allowed	Allowed

**Table 22.2** Relationships

Relationships	Operations	
	Create	Delete
<b>Entity-Entity</b> (Built-in to Built-in)	Not Allowed	Not Allowed
<b>Entity-Facet</b> (Built-in to Built-in)	Not Allowed	Not Allowed
<b>Entity-Facet</b> (Built-in to User defined)	Allowed	Allowed
<b>Facet-Facet</b> (Built-in to Built-in)	Not Allowed	Not Allowed
<b>Facet-Facet</b> (User Defined to User Defined)	Allowed	Allowed
<b>Facet-Facet</b> (User Defined to Built-in)	Allowed	Allowed

## Getting Started

### Entity Types

#### Overview

After signing in, click **Schema Designer** link on the dashboard screen on the left pane under **Configuration**. On the Schema Designer screen three links are available on the left pane.

By default , a search screen for the entity appears. The screen has the following two sections :

1. **Search:** Enter the search queries and search by clicking **Search**. By clicking **Show All** all the entity types present in the system are displayed. To clear the search criteria click **Clear**.
2. **Entity Type List:** In this section the searched entity types are displayed with its description.

#### Viewing Entity Types

Click on the entity type name link to view the details. A create entity type screen with the following sections appear:

- Entity Type Details: The entity type name and its description appears.
- Manage Attributes: You can view the attributes for the entity type. Each row displays the attribute details such as name, display text, data type, data size, UI type, default value, mandatory, a search field, the named hierarchy which is associated with the attribute, level, the named hierarchy value type and the display order. Each attribute name in the list has a link to view the attribute details. The following data types are supported:

**Table 22.3** Data Types

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

Data Type	Description
STRING	Stores fixed sized string.
TEXT	Stores large text.
BOOLEAN	Stores Boolean that is, 0 or 1

- **Manage Assemblies:** An assembly is a relationship between two entities in the system. Add assemblies by entering the assembly name, display name, select an entity type name and the assembly type from a drop down list. After specifying all the details click **Add**.
- **Assemblies:** A list of assemblies for the current entity type are displayed. You can delete an assembly by selecting it and clicking **Delete**. Editing the assemblies is not permitted.
- **Manage Association:** You can associate a facet with the entity type. Add a new association by entering details such as the association name, display name and select the facet type name by clicking **Select**. Specify if the facet is a series or if you are using the facet for ODS. If the facet is selected for the ODS, then reference field is specified. You can specify ODS support for selected modules within SAS Marketing Operations Management system. When an entity is selected for ODS the fields are available for reporting purpose. After specifying all the details click **Add**.

*Note:* The Association Name should not have a space. When you select a facet as a facet series be sure add it as a facet series in UI Framework the audit history for the facet does not appear.

- **Associations:** A list of associations for the entity type appears. Delete an association by selecting it and clicking **Delete**. Editing of association is not permitted.

You can export the selected association by clicking **Export NH Value**. To add ODS support to the association click **Add ODS Support** and to remove the support click **Remove From ODS**.

Figure 22.1 Entity Type Details

Create Entity Type

Entity Type Details

\* Entity Type Name:  Description:

Manage Attributes

<input type="checkbox"/>	Name	Display Text	Data Type	Data Size	UI Type	Default Value	Mandatory	Search Field	Named Hierarchy	Named Hierarchy Value Type	Display Order
<input type="checkbox"/>	DAMJOBID	DAM JobID	INTEGER	8	EDITBOX		TRUE	FALSE			1
<input type="checkbox"/>	JOBNAME	Name	STRING	300	EDITBOX		FALSE	FALSE			2
<input type="checkbox"/>	STATUS	Status	STRING	50	EDITBOX	New	FALSE	FALSE			3
<input type="checkbox"/>	SUBMISSIONTIME	Submission Time	DATE TIME	8	CALENDAR		FALSE	FALSE			4
<input type="checkbox"/>	COMPLETIONTIME	Completion Time	DATE TIME	8	CALENDAR		FALSE	FALSE			5
<input type="checkbox"/>	INPUTXML	Input XML	XML	0	XMLBROWSER		FALSE	FALSE			6
<input type="checkbox"/>	CONFIGXML	Configuration XML	XML	0	XMLBROWSER		FALSE	FALSE			7
<input type="checkbox"/>	RETRYCOUNT	Retry count	INTEGER	8	EDITBOX	0	FALSE	FALSE			8
<input type="checkbox"/>	JOBPATH	Job Path	STRING	255	EDITBOX		FALSE	FALSE			9
<input type="checkbox"/>	JOBTYPE	Type of JOB	STRING	50	EDITBOX		FALSE	FALSE			10
<input type="checkbox"/>	APPLICATIONNAME	Application Name	STRING	255	EDITBOX	DAM	FALSE	FALSE			11
<input type="checkbox"/>	COMPLETEDON	Job Completed On	DATE TIME	8	CALENDAR		FALSE	FALSE			12

Cancel

Manage Assemblies

Assembly Name:  Display Name:

Entity Type Name:  Select Assembly Type:

Add

<input type="checkbox"/>	Assembly Name	Entity Type Name	Assembly Type	Display Name	Is in ODS?
<input type="checkbox"/>	DAMJOB_DAMASSETPROCESS	DAMASSETPROCESS	Independent	Job for DAM Process	
<input type="checkbox"/>	DAMJOB_JOBERROR	JOBERROR	Child	DAM Job Error	
<input type="checkbox"/>	DAMJOB_CREATOR	USER	Independent	DAM Job Creator	
<input type="checkbox"/>	ORDER_DAMJOB	ORDER	Independent	DAM Job Order association	

Delete

Manage Associations

Association Name:  Display Name:

Facet Type Name:  Select

Facet is a series

Add

<input type="checkbox"/>	Association Name	Facet Type Name	Display Name	Is Series?	Is in ODS?
There are no associations to show					

Delete | Export HTML

## Facet Types

### Overview

To manage facet types click **Facet Types** link on the left pane of Schema Designer. This screen has the following two sections:

- **Search:** To search for a facet, enter the search queries and click **Search**. All the facets are displayed when you click **Show All**. To clear the search criteria click **Clear**.
- **Facet Type List:** In this section the searched facet types are displayed with its description. You can delete a selected facet clicking **Delete** and create a new facet by clicking **Create**.

### Creating a Facet Type

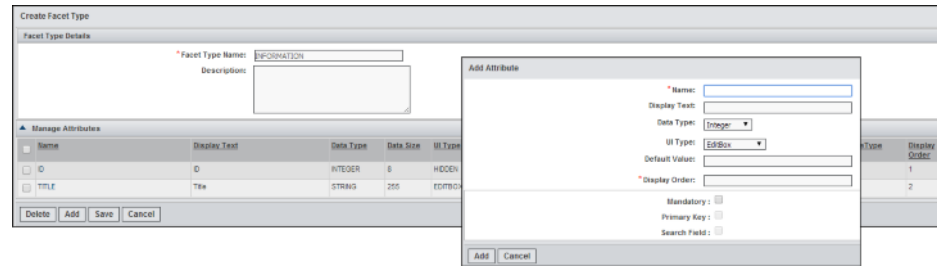
Click **Create**, a create facet type screen with the following sections appear:

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

*Note:* The Facet Type Name must not contain a space and do not use a database keyword in the name of a facet attribute.
- **Manage Attributes:** Add the attributes for the facet type by clicking **Add**. On the add attribute screen, specify the name, display text, data type, UI type, default value, display order. Specify if the field is a mandatory field, primary key or a search field. The data types mentioned in [Table 22.3 on page 137](#) are supported. The UI type changes depending on the data type selected. Click **Add** to add the attribute. Click **Save** on the create facet screen to save the attribute for the facet.

*Note:* Do not use a database keyword in the name of a facet attribute.

**Figure 22.2** Create Facet Type



After saving the facet type, the following sections are available:

- **Manage Associations:** In this section you can associate another facet type. Add a new association by entering details such as association name and display name. Select the facet type name by clicking **Select**. Select an association type from the drop down list. Specify if the facet is a series. After entering all the details click **Add**.

*Note:* When you select a facet as a facet series be sure add it as a facet series in UI Framework the audit history for the facet does not appear

- **Associations:** List of associations for the current facet type appears. You can delete the selected association by clicking **Delete**.

## Named Hierarchies

### Overview

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

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

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

To manage a named hierarchy in the system click **Named Hierarchies** link on the left pane of the Schema Designer. This screen has the following two sections:

**Manage Search:** Enter the search queries and search by clicking **Search**. Click **Show All** to view all the named hierarchies present in the system. To clear the search criteria click **Clear**.

**Named Hierarchies:** In this section the searched named hierarchies are displayed with its description. Delete a selected Named Hierarchy by clicking **Delete**. To create a new Named Hierarchy, click **Create**. Select the Named Hierarchy to be exported and click **Export NH List** (An Excel sheet is created with all the values listed in the Named Hierarchy).



### Creating a Named Hierarchy

*Note:* It is recommended that the admin user add or update the named hierarchies at a time when users are not accessing the system. The end users will not see the updated named hierarchy if the admin creates, deletes or updates it until the next login.

To create named hierarchies click **Create**. Enter the name and description and click **Save**. A named hierarchy screen appears where you can add values.

Each named hierarchy in the list has a link, which displays the values under it. You can add new values or delete the existing values. You can specify the order in which the values are displayed to the end user. It can be alphabetically or in the order in which it is created or arranged. To achieve the ordering of the values click **Set Order**. By clicking **Add Translations**, you can add translations to the named hierarchy values in German, Japanese and Korean.

**Figure 22.3** Add Named Hierarchy Value

## Example

You can store more information with a digital asset. Create a facet called **Searchinfo** with the following fields which will be available for the end user to enter details:

Field Name	Data Type	UI Type	Searchable	Named Hierarchy
ID	Integer	Hidden	No	
Media Type	String	Dropdownlist	Yes	Yes (Associate the 'Media Type' Named hierarchy)

Field Name	Data Type	UI Type	Searchable	Named Hierarchy
Title	String	TextBox	Yes	
Region	String	TreeView	Yes	Yes(Associate the 'Region' Named hierarchy)
Date_Published	Date	Calendar		
Copyright	String	Text Area	Yes	

To create the above facet, follow the steps below:

1. Create a Named Hierarchy **Media Types** for the **DropDownlist** UI type with the following values:
  - a. Print
  - b. Radio
  - c. TVC
2. Create the facet **Searchinfo** with the fields mentioned in the above table. To add **Media type** field which is a drop down list, attach the named hierarchy created above. You can select the named hierarchy value type as any one of the following:
  - a. Value: This means all the values present in the Named Hierarchy will be displayed.
  - b. Path: This means if there is a hierarchy created then only the first level of hierarchy will be displayed. This level can be expanded to see the next levels.

Similarly for the field **Region**, you can attach a Named Hierarchy with Treeview type. After all the fields are added save the facet type.

**Figure 22.4** Add Attribute

**Add Attribute**

\* Name:

Display Text:

Data Type:

Data Size:

UI Type:

Default Value:

\* Display Order:

---

Mandatory:

Primary Key:

Search Field:

---

Named Hierarchy:

Named Hierarchy ValueType:

Figure 22.5 Create Facet Type

Name	Display Label	Data Type	Data Size	UI Type	Default Value	Mandatory	Search Field	Named Hierarchy	Named Hierarchy Value Type	Display Order
<input type="checkbox"/> ID	ID	INTEGER	8	HIDDEN		TRUE	FALSE		Value	1
<input type="checkbox"/> MEDIATYPE	Media Type	STRING	255	DROPDOWNLIST		FALSE	TRUE	Media Types	Value	2
<input type="checkbox"/> TITLE	Title	STRING	255	EDITBOX		FALSE	TRUE		Value	3
<input type="checkbox"/> REGION	Region	STRING	255	TREEVIEW		FALSE	TRUE	REGIONS	Value	4

- After the facet is created, associate it with the DIGITALASSET Entity. Go to the Entity Types and search for the **DIGITALASSET** Entity. Go to the **Manage Associations** section and enter the association name, display name and select the facet type name (the facet created above). Click **Add** to add the association. The association will appear in the Associations section.

Figure 22.6 Manage Associations

Association Name	Facet Type Name	Display Name	Is Series?	Is In ODS?
<input type="checkbox"/> DAM_ID_DEMO	ID_DEMO	ID Demo	FALSE	TRUE
<input type="checkbox"/> DIGITALASSET_ASSETYPENFO	ASSETYPENFO	DIGITALASSET_ASSETYPENFO	FALSE	
<input type="checkbox"/> DIGITALASSET_IMAGEBANK_INFO	IMAGEBANK_INFO	Image bank information	FALSE	
<input type="checkbox"/> DIGITALASSET_WOM_DEMO	WOM_FACE_DEMO	DIGITALASSET_WOM_DEMO	FALSE	FALSE
<input type="checkbox"/> DIGITALASSET_WOM_FACE	WOM_FACE	DIGITALASSET_WOM_FACE	TRUE	FALSE
<input type="checkbox"/> DIGITALASSET_PROMOTIONAL_ASSET	PROMOTIONAL_ASSET	PROMOTIONAL_ASSET	FALSE	
<input type="checkbox"/> DIGITALASSET_TAGTAXONOMY	TAGTAXONOMY	Tag Taxonomy association with Digital Asset	FALSE	FALSE
<input type="checkbox"/> DIGITALASSET_TREEVIEW	WOM_DEMO_TREEVIEW	DIGITALASSET_TREEVIEW	TRUE	FALSE

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



## Chapter 23

# Creating Processes

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## Process Designer

### Prerequisites

Here are the prerequisites while configuring the workflow process:

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

*Note:* Refer to “[Creating Vaults](#)” on page 16 for creating vaults.
2. Configure User Groups and Resource Categories: Refer to the User Management and Resource Management guides for more information.

While configuring user groups, it is recommended to create a parent group and add all the groups as child groups below it. This helps enhance the performance of SAS Marketing Operations Management. For example, if you have multiple groups such as miscellaneous legal, multi brand legal, and so on, who are contributors to a task,

then create a parent group Legal and add all the groups as child groups. When selecting the contributors for tasks you need to select only the parent group.

### Configuring Working Days and Hours

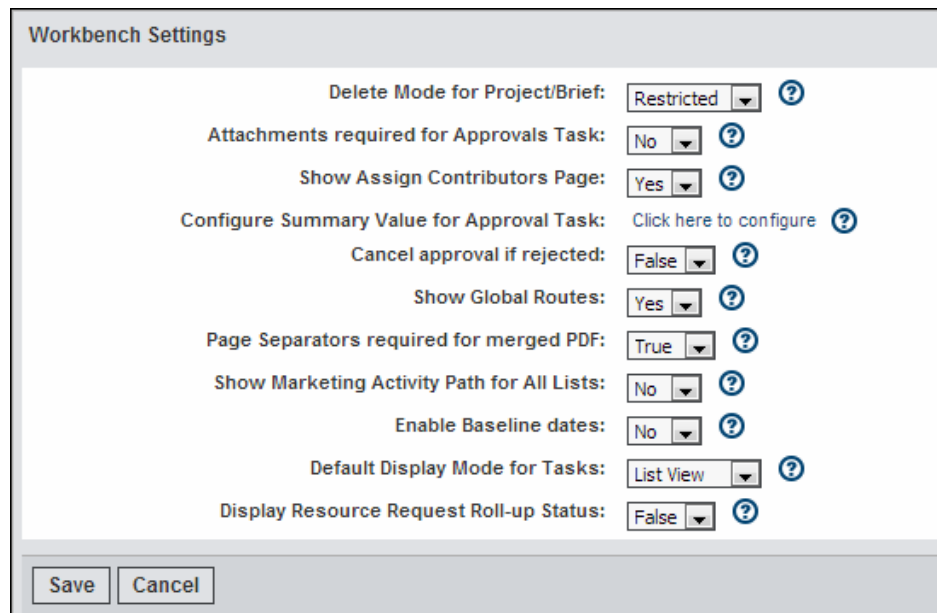
By default the setting for working days is set to 5 days a week and the working hours are set to 8 for a tenant. The default duration for a step in a task can also be set in number of days. The values of these settings can be modified from the Settings utility of the tenant.

### Workbench Administration

#### Workbench Settings

After logging on click **Workbench Admin** provided on the Dashboard screen on the left pane under Administration. A Workbench Settings screen appears.

Figure 23.1 Workbench Settings



You can do the following settings on this screen:

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

Settings	Expected Values	Explanation
Attachments Required for Approvals Task	Yes or No	This setting specifies whether attachments are required for the approvals task.
Show Assign Contributors Page	Yes or No	This setting specifies whether to show the assign contributors page while adding anew deliverable.
Configure Summary Values for Approval Task		Click the link to configure the named hierarchy values for the approval task. Refer to <a href="#">“Configure Summary Value in Workbench”</a> on page 148.
Cancel approval if rejected	True or False	If the setting is true, the cancel approval if rejected check box is selected by default in the approval task. If it is false, the check box is not selected by default in the approval task.
Show Global Routes	Yes or No	If the setting is yes, the routes created by the administrator are visible to all users. If the setting is no, the user can view the routes created by the individual.
Page Separators required for merged PDF	True or False	If the value is set to true, then a page separator containing details of each preview file from the component list is added in the merged PDF.
Show Marketing Activity Path for All lists	Yes or No	This determines whether the activity path for the briefs or projects created from strategic planner activities should or should not be displayed in all the lists in Marketing Workbench. The path appears only for briefs or projects initiated from strategic planner activities.
Enable Baseline Date	Yes or No	Whether to enable the baseline dates that is, the dates which the project manager sets for the start of the project. These dates might not be the actual dates the project starts.

Settings	Expected Values	Explanation
Default Display Mode for Tasks	List View or Visual View	Visual view displays the tasks in the visual workflow tool and list view displays tasks in the text mode in a grid layout. The administrator sets the default view for the end users to view the deliverable screen.
Display Resource Request Roll-up Status	True or False	If true, resource request roll-up status for the project appears on the project list screen. This should be yes if resource management is used for Marketing Workbench.

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

### **Configure Summary Value in Workbench**

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

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

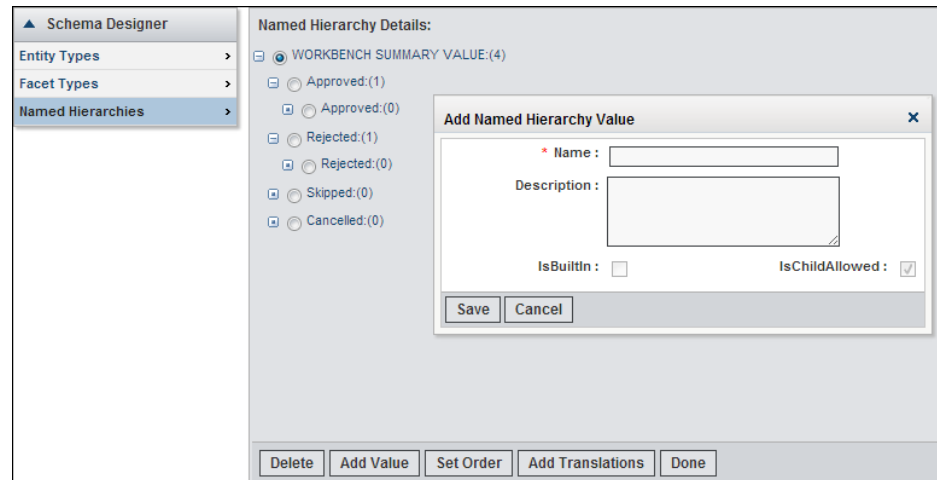
- Approved
- Rejected
- Skipped
- Canceled

*Note:* You can configure values for approved and rejected nodes only. Values configured 1 level below the approved and rejected nodes are displayed on the screen. Values configured under the approved node will result in the job review status as approved. Values configured under the rejected node will result in the job being marked as rejected.

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



Figure 23.2 Add Named Hierarchy Values



## Process Designer Utility

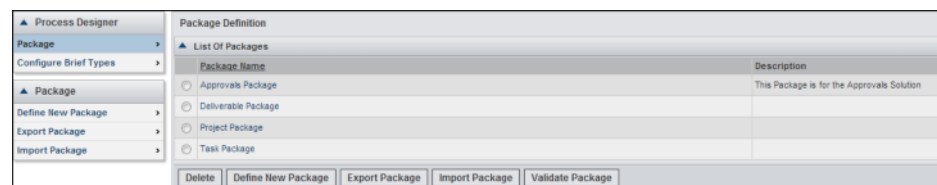
The Process Designer utility enables definition of process templates consisting of process steps, hierarchies, dependencies, data fields for each level, time lines, resource requirements and other business rules. When the process template is modified, a new version is created. The new version of the process template is available to the end users when it is created by the administrator.

Click **Process Designer** on the left pane under the *Configuration* menu. The list of existing packages defined in the system and its description appears. When the system is new, no packages are available, the administrator creates them to define the process. Create the following packages:

1. Task Package
2. Deliverable Package
3. Project Package

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

Figure 23.3 List of Packages



You can do the following operations on this screen:

- **Delete:** You can delete a selected package.
- **Define New Package:** Define a new package.
- **Export Package:** You can export a selected package. An XPDL file appears in a browser, save the file as a text file and rename it with the extension *.xpdL*.

- **Import Package:** You can import a package. An Import Package screen appears. Select an existing XPD file with the package definition and upload it.

**Figure 23.4** Import Package

- **Validate Package:** You can validate the package.

*Note:*

- When we import or export XPD files to another installation, the following order must be followed (It works only if done in this order): Task Package, Deliverable Package and Project Package.
- The associated facets and resource categories are not imported or exported, create them manually. If the associated groups do not exist in the new system, then they are created automatically while importing the packages.
- Create the Brief Types after the tasks, deliverables and projects are defined.

## Configuring Task Types

### Overview

Task types are configured using the process designer utility. Create a *Task Package* when using the utility for the first time. If the package is present, then add new processes to it by clicking the package name link. All the processes defined in this package are treated as task types by the Marketing Workbench solution.

**Figure 23.5** Package Definition

Process Name	Description	Process Type
<input type="checkbox"/> Agency Briefing		Discussion
<input type="checkbox"/> Approve Artwork		Route
<input type="checkbox"/> Approve Artwork -multi-file		Multi-File Route
<input type="checkbox"/> Artwork Ready For Catalog		Tracking
<input type="checkbox"/> Collect Label Information		Gather Information
<input type="checkbox"/> Create Artwork		Assignment
<input type="checkbox"/> Sequential Approve Artwork -multi-file		Multi-File Route
<input type="checkbox"/> Shopper/Fiber Task		Assignment

On the Package Details screen, you can do the following operations:

- **Delete:** Select and delete processes only if the process selected for deletion are not referred to by any activity in other processes. Else, an alert saying the process cannot be deleted appears.
- **Define New Process:** You can define a new process. Refer to “[Define a New Process](#)” on page 151 for defining a process.

- **Copy Process:** You can make a copy of existing processes.
- **Export Process:** You can export selected processes.
- **Import Process:** You can import processes in the form of an XPDL file with the process definition.

### **Define a New Process**

On the Package Definition screen, click **Define New Process** or the link on the left pane. Select **Process Type** from the drop-down list. Select from the following types of processes:

- **Assignment:** For an assignment type of task.
- **Gather Information:** For gather information type of task.
- **Discussion:** For a discussion type of task.
- **Tracking:** For a tracking type of task.
- **Route:** For a route type of task.
- **Multi-File Route:** For a multi-file route type of task.
- **Web Process:** For a web service type of task.

Here are the common steps for all the task types:

**Table 23.1** Common Steps for Configuring Task Types

Attribute Name	Description	Values
Process Definition Name and Description		User-defined title and description
View Project and Deliverable Info	If the check box is selected, the project and deliverable details are visible to the contributor in a read-only format. This setting is available on the Process Definition screen for all task types.	By default, the check box is not selected.
Duration	The task process can have a default duration configured. This is mainly used for tasks which have no activities configured such as Route, Multi-Route, Discussion, and Tracking tasks.	Enter in days.
Offset	If the task is an automatic task and the predecessor is the start activity for the task, then the offset could be set. This is the number of days after which the task should start post deliverable activation.	Number of days.

Attribute Name	Description	Values
Version Number	The version number of the process.	User defined
Current Version	There can be multiple versions of a process definition. Process Definition which has Current Version set to YES is instantiated in Workbench.	Yes or No
Finish Mode	The finish mode should be automatic so that a task process can automatically be marked as complete when all the activities (steps) are completed or canceled	Automatic or Manual
Additional Facets	For additional information to be displayed for a task or to transfer information from the task to the deliverable or vice versa configure additional facets. Create facet types in schema designer and associate it to the WORKFLOWPROCESS entity type. This facet type is available in the drop down list of the additional facets. For more information refer to the Schema Designer user guide. The selected facet appears in the Selected Additional Facets section.	
Form List	This section is visible only if a facet has been selected. Click <b>Create Form</b> . After the forms are created <b>Refresh Form</b> is visible. The forms with the fields from the selected facets are displayed here. Click the form name link to edit the form. For all the task types except the web process task, you can edit the form for the component facet. You can edit the buttons which are visible to the task initiator. Refer to <a href="#">“Buttons Configuration for Components”</a> on page 165 for configuring the buttons.	When a facet is added, the form needs to be created or if any changes are made to the facet list then the form needs to be refreshed.

Attribute Name	Description	Values
Relevant Data Fields	This is the data that is created and used within each process instance during process execution. The data is made available to activities executed during the process and can be used to pass persistent information between the process and the parent process or vice versa. The data from the facets fields can be transferred to the deliverable or vice versa.	Select the formal parameters for the values displayed. The modes are: <ul style="list-style-type: none"> <li>In: When data comes in from the parent process</li> <li>Out: When data is going out to the parent process</li> <li>Inout: When data comes in and then is sent back out to the parent process.</li> </ul>
Component Facet	Create a facet in schema designer and associate it with the WORKFLOWPROCESS entity. This facet is selected at the task level. The form which displays the component facet as a series appears read-only to the contributor and editable to the task initiator based on the configuration. Component facet is not supported for the web process type of task.	Select a facet from the drop down list.
Participant List	Select the participants required for the task. This list of participants is used in selecting performers for the steps.	Values from the <i>RESOURCETYPE</i> named hierarchy.
Visual Workflow	You can define the steps by launching the visual workflow. Add the participants here.	
Send Notifications on Process Completion to: Users and Groups	Notifications are sent to users or groups on completion of the task. Select the users or groups while configuring a task type. This is done for all task types.	
Process Readers : Users and Groups	There are critical stakeholders in the organization who should have visibility into the tasks for a certain deliverable. You can include users or groups as <i>Readers</i> . Every instance of this type of task automatically includes the selected set of Readers.	

Attribute Name	Description	Values
Notification settings for Process	As a Project Manager, you can choose to send reminders to the stakeholders for a task, <i>n</i> days before they are due to begin. You can prepare and set up your tasks much before the actual start date and notify or remind the stakeholders just before action time.	
Activity Definition List	You can view the activities defined in the visual workflow here. By clicking <b>Activity Definition name</b> , you can edit the activity details as well as associate with the activity.	

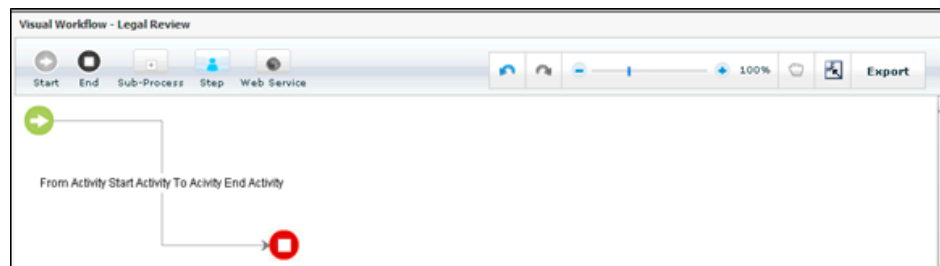
The version history appears and you can edit the template documents by clicking **Add**. To save the process click **Save**, to validate the process click **Validate Process**, to get a Gantt chart view click **Gantt Chart View**.

### How to Define Activities of Type Step

To define activities follow the steps below:

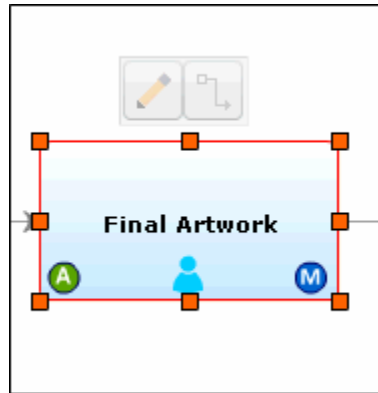
1. Click **Launch Visual Workflow** to launch the visual workflow tool. Define the activity or step on the visual workflow canvas. By default the start and the end activities are displayed. Resize the canvas and export it as an Image or a PDF.


**Figure 23.6** Workflow Canvas



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

Figure 23.7 Task Step



3. To add the activity definition details click  icon. An Activity Definition

Details popup appears. Enter the name, description, duration. The start mode should be automatic and the finish mode should be manual.

Figure 23.8 Activity Definition Details



4. To add the contributors click  icon. A Performer Selection popup appears. Select from the participant list and click **Done**.

Figure 23.9 Performer Selection

<input type="checkbox"/> Performer Type	Type	Hours	Instructions for Resource Category Head
<input type="checkbox"/> Managers	Group	8	
<input type="checkbox"/> Marketing Managers	Group	8	

<input type="checkbox"/> Participant Type Name	Type
<input type="checkbox"/> Legal	Group
<input type="checkbox"/> Managers	Group
<input type="checkbox"/> Marketing Managers	Group
<input type="checkbox"/> Copywriters	Resource Category
<input type="checkbox"/> Creative Designer	Resource Category
<input type="checkbox"/> Designer	Resource Category
<input type="checkbox"/> Flash Specialists	Resource Category

5. To link the activities, click  icon. Link the activities by dragging an arrow.

Provide a transition name if required.

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

### Configuring an Assignment Task

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

- To create a new process, select the task type as assignment and follow all the steps in “[Define a New Process](#)” on page 151.
- To define new activity, click **Launch Visual Workflow** and refer to “[How to Define Activities of Type Step](#)” on page 154.

In an assignment type of task, if there are more than one steps, they should be sequential that is, the steps should be executed one after the other.

### Configuring a Gather Information Task

When you need to gather information for a deliverable, a *Gather Information* type of task is configured. For configuring a gather information type of task follow the steps below:

- To create a new process select the task type as gather information and follow all the steps in “[Define a New Process](#)” on page 151.
- To define new activity click **Launch Visual Workflow** and refer to “[How to Define Activities of Type Step](#)” on page 154.

In a gather information type of task, if there are more than one steps, they should be simultaneous that is, the steps should be executed at the same time.



## Configuring a Discussion Task

A *Discussion* task is configured when you want to start a discussion. For configuring a discussion type of task follow the steps below:

- To create a new process select the task type as discussion and follow all the steps in “Define a New Process” on page 151.
- To define new activity click **Launch Visual Workflow** and refer to “How to Define Activities of Type Step” on page 154.

In a discussion type of task, if there are more than one steps, they should be simultaneous that is, the steps should be executed at the same time.

**Figure 23.10** Discussion Task

Activity Definition Name	More info	Start Mode	Finish Mode	Activity Type
Start Activity	/	Automatic	Automatic	Start Activity
Legal	/	Automatic	Manual	Step
Branding	/	Automatic	Manual	Step
Marketing	/	Automatic	Manual	Step
End Activity	/	Automatic	Automatic	End Activity

## Configuring a Tracking Task

When the initiator wants to track all the activities done in a particular task a *Tracking* task is created. To configure a tracking type of task, follow the steps below:

- To create a new process, select the task type as tracking and follow all the steps in “Define a New Process” on page 151.
- No activities are required for a tracking type of task.

*Note:* You do not need to select any participants or create any steps for this type of task.

## Configuring a Route Task

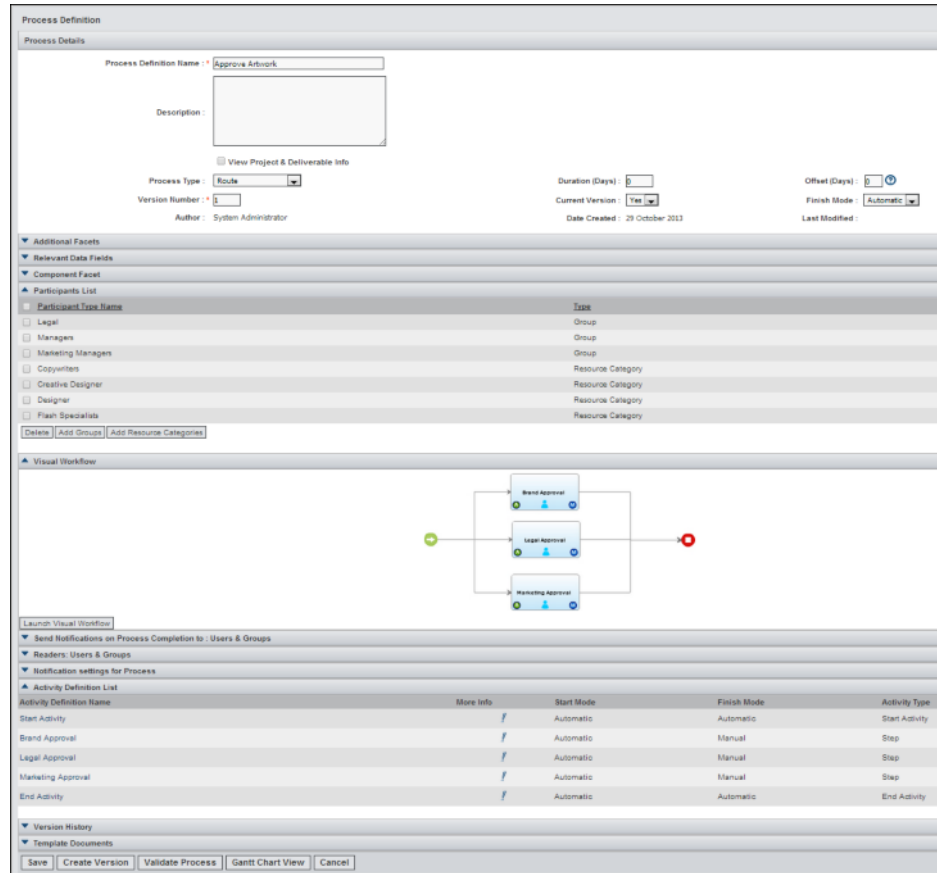
A *Route* task is configured when files are routed out for approval. For configuring a route type of task follow the steps below:

- To create a new process select the task type as route and follow all the steps in “Define a New Process” on page 151.
- To define new activity click **Launch Visual Workflow** and refer to “How to Define Activities of Type Step” on page 154.

If a step or activity is added to a route task, select the participants.

*Note:* In a route type of task, if there are more than one steps, they need to be configured as simultaneous or sequential. Mix of sequential and simultaneous activities is not supported.

**Figure 23.11** Route Task



### Configuring a Multi-File Route Task

A Multi-file Route task is configured when multiple files are routed in a single task for approval. For configuring a multi-file route type of task follow the steps below:

- To create a new process select the task type as multi-file and follow all the steps in “Define a New Process” on page 151.
- To define new activity click **Launch Visual Workflow** and refer to “How to Define Activities of Type Step” on page 154.

If a step or activity is added to a multi-file route task, select the participants.

*Note:* In a multi-file route type of task, if there are more than one steps, they need to be configured as simultaneous or sequential. Mix of sequential and simultaneous activities is not supported.

## Configuring a Web Process Task

A Web Process task provides support in process designer to configure activities to use services (web services) of external applications. For configuring a web process type of task follow the steps below:

- To create a new process select the task type as web process and follow all the steps in “[Define a New Process](#)” on page 151.
- To define new activity click **Launch Visual Workflow**.
- Define the dependency between the activities in the process.

*Note:* For the web process type of process no participants are selected.

*Note:* For a web process task, you can set the configuration for the task to auto-initiate.

There is no need for any manual intervention to initiate such a task. On completion of the earlier task in the workflow, the web process task is automatically initiated.

This depends on the configuration. You can configure the web service task for manual initiation.

**Define a New Activity for a Web Process Task:** Click **Launch Visual Workflow**. A visual workflow canvas appears where the step or activity is defined graphically. By default the start and the end activity appears. To add a step drag and drop the





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



Click icon and enter the following activity definition details:

Attribute Name	Description	Values
Activity definition name and description		User-defined title and description.
Duration	If you do not enter the duration, the default is 2 days while instantiating the activity.	Enter in days.
Start Mode		Automatic
Finish Mode		Automatic

Click  icon and select the web method from a configured list.

Click  icon and do the web service (formal parameter) and actual parameter mapping.

**Figure 23.12** Web Service and Actual Parameter Mapping

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

## Configuring Deliverable Types

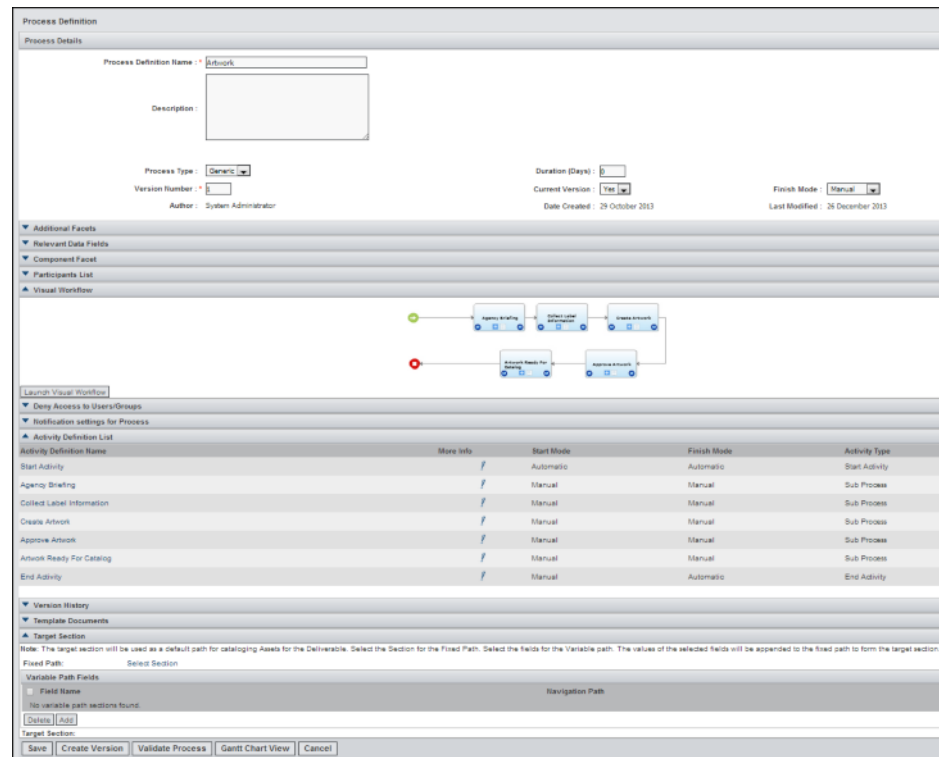
### Configure a Process

To configure deliverable types, first create the Deliverable Package. All the processes defined in this package are treated as deliverable types by the Marketing Workbench solution. To define a new process in the deliverable package click **Define New Process**.

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

- To create a new process, select the task type as generic and follow all the steps in “[Common Attributes of Process](#)” on page 161.
- To define new activity, click **Launch Visual Workflow** and Refer to “[How to Define Activities of Type Sub Process](#)” on page 164. The activities other than the start and end activity are of type Sub Process and they reference to the processes defined in the Task Package.
- Set appropriate dependencies in the activities defined in the deliverable process.

**Figure 23.13** Define Process for Deliverable



**Common Attributes of Process**

The process type should be Generic.

**Table 23.2** Common Steps for Configuring a Generic Process Type

Attribute Name	Description	Values
Process Definition Name and Description		User-defined title and description
Version Number	The version number of this process.	User defined
Current Version	There can be multiple versions of a process definition. Process Definition which has Current Version set to Yes is instantiated in Marketing Workbench.	Yes or No

Attribute Name	Description	Values
Finish Mode	If the deliverable is marked as completed or canceled by the Project Manager manually, then its finish mode is manual. If the deliverable is marked complete automatically when all the tasks in the deliverable are completed or canceled, then the finish mode is automatic.	Manual or Automatic
Additional Facets	Configure additional facets for deliverable types if any. To view the facet types in the drop down list of additional facets, create the facet type using Schema Designer and associate this facet to the WORKFLOWPROCESS entity type. To display these fields on the details screens of the tasks, The administrator can configure the fields on the form using the UI Framework utility. Refer to the Schema Designer user guide for more information. The selected facets appear in the Selected Additional Facets section.	Select facets from the drop down list.
Relevant Data Fields	This is the data that is created and used within each process instance during process execution. The data is made available to activities executed during the process and can be used to pass persistent information between the process and the parent process or vice versa.	Select the formal parameters for the values displayed. The modes are: <ul style="list-style-type: none"> <li>• In: When data comes in from the parent process</li> <li>• Out: When data is going out to the parent process</li> <li>• Inout: When data comes in and then is sent back out to the parent process.</li> </ul>
Component Facet	A facet series which is created in schema designer and associated with the WORKFLOWPROCESS entity. The component facet which is selected at the task level should be selected here.	Select a facet from the drop down list.

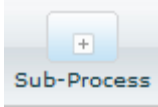


Attribute Name	Description	Values
Form List	<p>The forms created for the selected facet are displayed here. A search form is created for searching for assets that are associated with the components. A deliverable form that is used when a user adds a deliverable from a brief. There are two separate deliverable forms:</p> <ul style="list-style-type: none"> <li>• A form when we add or edit deliverables from briefs.</li> <li>• A form when we add or edit deliverables from projects</li> </ul> <p>The layout, validations and mandatory values for the fields on these two forms can be configured independently. Refer to <a href="#">“Buttons Configuration for Components” on page 165</a> for configuring the buttons.</p>	
Unique Identifier Fields	<p>You can define a unique identifier for components. This helps identify each component in the list with a distinct name. The unique identifier is configured using the fields from the component facet. Fields with UI Type as Edit box, Radio button and drop-down can be selected.</p>	
Participant List	<p>Is not required as no activity is defined in the deliverable.</p>	
Complete Access User Groups	<p>Configure users and groups who have complete access on the Projects. You can do this for all Project types. Administrator can add and delete users and groups for the Complete Access Group.</p>	Only for Projects.

Attribute Name	Description	Values
Restricted Groups for Process	In the Restricted Groups for Process section, for each Project Type, you can add groups such as Project Managers Group. The selection for the Project Manager and the Acting Project Manager is possible only from this group if configured.	Only for Projects.
Activity Definition List	The start and the end activities are created by default by the system whenever the user clicks <b>Define New Process</b> . Between the start and end activities define all other activities that the process should have. Dependencies between these activities is set as per the process types.	
Target Section	<p>You can configure the section path where the assets are cataloged for a deliverable. This section path has two parts:</p> <ul style="list-style-type: none"> <li>• Fixed path: For fixed path the user can configure the vault and section where the asset is cataloged.</li> <li>• Variable path: For variable path the user can select the fields from the facets associated with the deliverable process. You can select the fields with UI Type Edit box, Radio button, and drop-down.</li> </ul> <p>In Marketing Workbench, the values of the fields defined for the variable path are fetched from the deliverable facet and appended to the fixed path. This path is then used for cataloging the assets in Digital Library.</p>	

### **How to Define Activities of Type Sub Process**

Similar to the activity of type Step, configure the activity of type Sub Process using the visual workflow. To define the activities, follow the steps below:



1. Click **Launch Visual Workflow** to launch the visual workflow tool. A visual workflow canvas appears where you can define the step or activity graphically. By default the start and the end activity appears. You can resize the canvas as well as export it as an Image or a PDF.
2. To add a step, drag and drop the  icon onto the canvas. Set the dependencies between the activities by clicking on the arrows and arranging them accordingly.
3. To add the activity definition details, click  icon. An Activity Definition details popup appears. Enter the name, description, duration. The start mode should be automatic and the end should be manual.
4. You do not need to add contributors. Select a task from the configured task types from the task package for defining a deliverable type and click **Save**. You need to map the formal and the actual parameters if a data transfer is configured, by clicking  icon.
5. After all the relevant information is entered save the activity definition.

Add the facets by clicking the activity definition name link on the Process Details screen.

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

## Configuring Project Types

To configure project types, first create a Project Package. All the processes defined in this package are treated as project types by the Marketing Workbench solution. To define a new process in the project package, click **Define New Process**.

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

- To create a new process, select the generic task type and follow the steps in [“Common Attributes of Process” on page 161](#).
- To define a new activity, click **Define New Activity** and Refer to [“How to Define Activities of Type Sub Process” on page 164](#). The activities other than the start and end activity are of type Sub Process and they all will reference to the processes defined in the Deliverable Package.
- Set appropriate dependencies for the activities defined in the deliverable process.

Configure Additional facets for projects types. To view the facet types in the drop down list of additional facets, create the facet type using Schema Designer and associate this facet to the WORKFLOWPROCESS entity type. To display these fields on the details screens of the project, configure the fields on the form using the UI Framework utility. Refer to the Schema Designer user guide for more information about associating a facet with a project type.

## Buttons Configuration for Components

*Note:* Edit and Select options cannot appear at the same time for the same component list on the same form. Edit or Select buttons should be configured such that they are not visible for the Read-only forms.

*Note:* Export and Batch Download buttons should be configured such that they are visible for the Read-only forms.

**Table 23.3** Buttons Configuration for Components

Screen	Buttons (Display Text)	Buttons (Name)
Read-Only Deliverable Details Screen	Edit	EditSeriesRecord
	Initial Lock	InitialLockSeriesRecord
	Final Lock	FinalLockSeriesRecord
	Unlock	UnLockSeriesRecord
	Batch Download	BatchDownloadDigitalAssets
	Export	
Task Level Edit	Edit	
	Batch Download	BatchDownloadDigitalAssets
	Export	
	Select	SelectSeriesRecord
Activity Level	Edit	
	Batch Download	BatchDownloadDigitalAssets
	Export	
	Select	SelectSeriesRecord
Brief Deliverable	Edit	
	Batch Download	BatchDownloadDigitalAssets
	Export	

Screen	Buttons (Display Text)	Buttons (Name)
Edit Records	Delete	
	Add	
	Copy	
	Export	
	Import	
	Batch Upload	BatchUploadDigitalAssets
	Batch Download	BatchDownloadDigitalAssets
	Save	SaveSeriesRecord

### Configuring Brief Types

Click **Configure Brief Types** link on the left pane to configure new brief types.

A list of existing brief types appears. To add a new brief type, click **Add Brief Type**.

Enter the following information to setup brief types: Brief Information:

- **Brief Type Name:** The name for the brief type.
- **Brief Assigned To:** Select whether the brief should be assigned to an individual or a group. If the group option is selected, then select the groups.
- **Project Manager Selection:** You can select the project managers in two ways—from a list of all users or you can restrict the selection to certain groups. This group is configured by the administrator while creating a project type.
- **Select Default Project Type:** Select the default project type that appears on the Brief Details screen
- **Select additional facets:** Select the additional facets that are created and associated when the brief instance is created from this brief type. To view the facet types in the drop-down list of additional facets, create the facet type using Schema Designer and then associate this facet to the BRIEF entity type. To display these fields on the details screens of the brief, configure the fields on the form using the UI Framework utility. Refer to the Schema Designer User Guide for more information of creating facets.
- **Readers: Users and Groups:** Select the default readers. These readers are populated when this brief type is created.
- **Template Documents:** Click **Add** to add the templates documents.

To save the brief type, click **Save**. To view or edit the details of the brief type, click on the brief type name link in the brief types list.

### ***Adding Facets to a Brief***

You can attach additional information to a brief, project, deliverable, or a task. To add facets to a brief, associate the facet to the **BRIEF** entity type. To add facets to a project, deliverable or task associate the facet to the **WORKFLOWPROCESS** entity type. For more information about facet creation and association, Refer to [“Creating a Facet Type”](#) on page 139.

## Chapter 24

# Customizing the Forms

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## Overview

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

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

---

## Getting Started

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

**Figure 24.1** Solution List


Solution List	
Name	Display Text
StrategicPlanner	Strategic Planner
MarketingWorkbench	Marketing Workbench
Approvals	Approvals
Administration	Administration
DAM	Digital Library
ResourceManagement	Resource Management
ArtworkProducer	Artwork Producer
CampaignManager	Campaign Manager
ClaimsManagement	Claims Management
Timesheets	Timesheets
PIM	Product Information Management

---

## Form Configuration

### Overview

Click the solution name link to get the list of forms and widgets configured for the solution.

On the form list screen, the form name and the display text appears. Each form name has a link to change the layout of the form. To edit the form details click  icon:

### Editing the Form Details

On the form details screen, the form name is not editable as it is a unique name.

You can edit the following details:

1. **Display Text:** The text to be displayed.
2. **Show form heading:** Select whether to display the heading for the form.
3. **Display form border:** Select whether to display the border of the form.
4. **Form Expand or Collapse image alignment:** Select from the options in the drop down list.
5. **Buttons in Form:** Select whether to display the buttons in the form.
6. **View Audit History:** Select whether to display the audit history for this form.

To save the form, click **Save**.

To select a base entity or facet click **Select Base Entity**. This is required only if a new form is being created. To select related entities for the base entity click **Select Superset**. Its related entity allows the administrator to select attributes from the selected entity for the form.

### Form Layout

#### Changing the Form Layout

Click the form name link on the form list screen to change the current form layout. A layout screen appears. Select the fields for display in the section. Drag and drop the fields and arrange them on the form. You can delete the fields or attributes or edit their properties. You can specify the label, help messages, instructions and other user interface properties for each field or attribute properties. You can add sections, edit fields or attributes and delete fields or attributes on this screen. By clicking on the icon on the top right corner of the section header, a menu with the following links appears:

1. **Edit Section:** You can edit the section details.
2. **Add Sample Fields:** Add sample fields or attributes to the section. These are sample fields are not added or stored in the database. The sample field is used to generate mock-ups where the schema is not defined.
3. **Add Database Fields:** Add fields or attributes from the selected business attributes to the form.

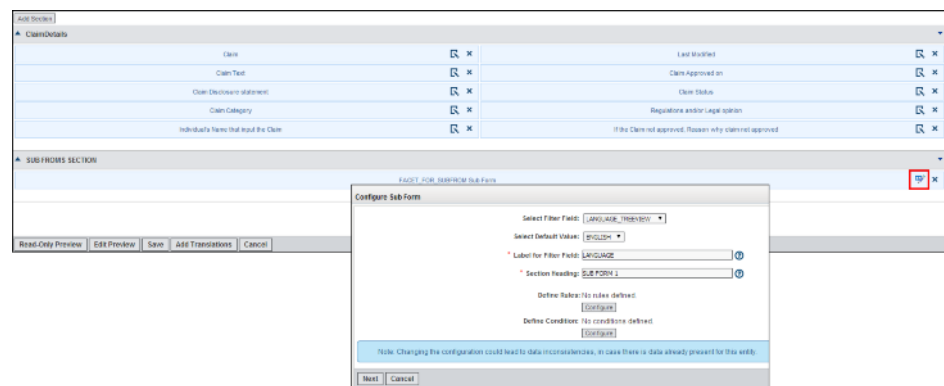
4. **Add Series:** You can create a form and add facet series to the forms to be displayed in the solutions or applications.

*Note:* When adding a facet series be sure to mark the facet as facet series while creating it in Schema Designer else the audit history for the facet does not appear.

5. **Add Sub Form:** You can configure a sub form within a form. This control enables the display and storage of facet fields for different selections in a drop-down list field. You can select a filter field, for example, if *Language* is selected then a user can enter a set of metadata fields in different languages configured in the drop-down list field. The sub-form control is supported for the Product Information Management and Claims Management solutions.

*Note:* Only String data types associated with the named hierarchy are supported in the filter drop down while creating or configuring the sub form.

**Figure 24.2** Configure Sub Form



6. **Delete Section:** Delete the selected section (Only if the user has access to the section).

You can perform the following actions using the buttons provided on the screen:

- **Read-Only Preview:** Displays the preview of the form when it appears in the Read-Only mode.
- **Edit Preview:** Displays the preview of the form when it appears in an editable mode.
- **Save:** Saves the changes made.
- **Add Translations:** This enables you to add translations to the fields in English, German, Japanese and Korean.
- **Cancel:** Cancels the operation.

**Figure 24.3** Form Layout

The screenshot shows a 'Form Layout' window titled 'Add Section'. It is divided into four main sections, each with a header and a list of attributes with edit icons:

- Basic Information:** Document Title, Description, Author Title.
- XMP Creator Information:** Author, Keywords, Date Created, Metadata Date, Description/Title, Creator Tool, Date Modified, Format.
- Copyright Information:** Copyright Status, Copyright Notice, Copyright Info URL.
- File Information:** Name, Resolution X, Resolution Y, Resolution Unit, YCBCR Postering, Max Dimension X, Max Dimension Y, Flash Flood, Flash Return, Flash Puncture, ISO Speed/Release, Orientation, Saturation, Aperture Value, Max Aperture Value, Shutterpress, Shutter Speed, Exposure Program, Light Source, Color Space, Metering Mode, File Source, J-Ratio, File Source, Compressed Size per Pixel.

At the bottom of the window, there are five buttons: 'Read Only Preview', 'Edit Preview', 'Save', 'Add Translations', and 'Cancel'.

### Adding a Section to the Form

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

Enter the following details about the add section screen:

1. **Name:** The section name.
2. **Column Layout:** Specify how many columns are laid out on the section.
3. **Section visible mode:** Select the mode how you want the section to display:
  - Read Only and Edit
  - Read Only
  - Edit
4. **Show Section Heading on Read-Only Page:** Select whether to display the section heading on a read-only page
5. **Show Section Heading on Edit Page:** Select whether to display the section heading on the edit page (page which is editable)
6. **Show Section Border:** Select whether to display the section border.

**Section Expand or Collapse image alignment** - You can change the alignment of the image to left or right or you can disable the alignment.

7. **Define Rules:** During form configuration, you can set up rules or roles for sections, for example, a certain role of users can edit only a certain section of information about the form. The rest of the sections on the form are read-only to them. You can set multiple rules on a section of the form. For more information contact the Technical Support team.
8. **Define Condition:** You can set a condition for the visibility of a section, for example, if the status is Active, only then a section of the form is visible. For more information contact the Professional Services team.



9. **Css Heading Title:** Specify the presentation style for the header title by specifying the style sheet class.
10. **Css Heading Background:** Specify the presentation style for the heading background by specifying the style sheet class.
11. **Css Section Border Color:** Specify the presentation style for the border color by specifying style sheet class.
12. **Css Section Content Background:** Specify the presentation style for the section content background by specifying the style sheet class.

After entering all the details save the new section by clicking **OK**.

**Figure 24.4** Add Section

### **Adding a Facet Series to the Form**

**Facet Series:** Schema designer supports entity to facet association as well as facet to facet association. You can store multiple instances of a single facet associated with an entity. Create a facet series in Schema Designer by selecting a facet as a facet series, then it is available in UI Framework for selection.


You can add the facet series for the following solutions:

1. Marketing Workbench
2. Strategic Planner
3. Artwork Producer
4. Digital Library
5. Product Information Management

You can set the sorting field and sort order for facet series. After clicking **Add Series** link, an **Add Facet Series** popup appears.

*Note:* When adding a facet series be sure to mark the facet as facet series while creating it in Schema Designer else the audit history for the facet does not appear.

### **Editing Field Properties in a Section on a Form**

To edit the field properties click on  icon next to the field name.

For all types of fields, the label, default value, content type and UI type are standard fields which you can modify. The rest of the fields depend on the type of field selected.

*Note:* The default value appears to the end user in case a new instance of this form is created. It is not visible in case the user is modifying or editing the fields on the form.

The fields are displayed in the following modes:

1. **Editable:** The end user is allowed to edit this field.
2. **Disabled:** The end user views the field in a disabled (grayed out) mode.
3. **Read-only:** The end user views the field in a Read-Only mode.
4. **Hidden field:** The field is not displayed on the form to the end user.

You can modify the following fields on the add field screen depending on the type of the field:

1. **For content type String or Numeric** - You can Select Series. Form control provides the facility to add an Edit box on a form, which have values that are populated from the respective Object ID Series. The users can configure these fields through the UI Configuration utility and associate the series from which the values are generated. These fields are editable or read-only depending on the need of the application. For example, the *Vendor Number* field of the type **EditBox**, the number is auto generated and its value is derived from the Object ID Series VENDORNUMBER.

**Figure 24.5** Add Field of Type String

2. **For content type DateTime** — Form control allows the user to display time along with the date for any field. You need to configure this in the configuration xml. By default only the date appears. To display the date-time for a field, select the date mode **datetime**.

**Date Dependency:** Calculated date fields on a form are the fields where, the value of the date field depends on the value of some other date field on the same form. In such cases, the control itself calculates the date for the dependent field based on the date selected in the parent field. The calculation is based on the following settings for the field in UI Framework:

- a. **Field Name:** Name of the calculated field, for example, End Date.
- b. **Depends On:** Name of the field on which the calculation depends or is based on, for example, Start Date.

- c. **c.Operation:** Increment or Decrement.
  - d. **d.Days:** Number of days by which the value is incremented or decremented, for example, 15 days.
  - e. **e.Months:** Number of months by which the value is incremented or decremented.
  - f. **f.Years:** Number of years by which the value has to be incremented or decremented
  - g. **g.Consider Non-Working Days:** If the check box is not selected, the nonworking days will not be considered while calculating the next date. The non-working days are skipped.
3. **For content type Binder:** Form control provides the facility to upload and save single or multiple files. You can configure field using Schema Designer and the form configuration utility. The fields are editable or read-only depending on the need of the application.
  4. **For content type Boolean:** You can configure check boxes Boolean data type fields. In the Read-Only mode of the form, these check boxes are disabled for selection. For the UI types Radio Button and Drop-down list the user can set the display text that is associated with these values. The user can also set which field should be shown as a default selected while the form is being generated in the Create mode. In the configuration XML, the child Item nodes are created for the field. These nodes have the display value that the user specifies and value is either 0 or 1.
  5. **For content type Integer:** Functionality is provided to configure whether to apply formatting for specific fields. This is visible for the fields having data type - Integer, Float, Currency and Date types. If the check box is checked, then formatting is applied for the values of those fields when the form appears in a Read-Only mode.
  6. **For any content type using a Named Hierarchy:** A Named Hierarchy in the Schema Designer module contains a list of values that show up on a form in a drop down list or a multi-select tree. Through UI Framework, you can suppress some of these values from showing up on the form for selection by the user. The user can select specific values to be displayed by separating them with commas.

*Note:* Only the first level of values of the named hierarchy are displayed. This feature is not supported for the Activity type named hierarchy on the activity details form for the Strategic Planner.

**Figure 24.6** Add Field of Type Date Time

*Note:* You can define the rules and conditions for a field. For more information contact the Technical Support team.

## Chapter 25

# Configuring the Partner Channel Management

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## Overview

This utility allows the administrator to register the capabilities of the Partner Channel Management system. The end user (partners, vendors or agencies) in turn can use the capabilities set by the administrator.

The administrator can set up the Dashboard. Refer to “[Configure the Dashboard](#)” on [page 30](#) create a Dashboard for Partner Channel Management. Follow the guide to create pages and channels.

Log on to Partner Channel Management by entering **http://<MOM IP>/<Tenant name>/pcm**, for example, **http://1.1.1.1/MOM/pcm**. Enter your credentials.

---

## Managing the Capability

After logging on, the Administration section available on to the administrator. Click **Capability Management** in the left pane. A Capability Management screen appears. In the Unregistered Capabilities section, select the capabilities that you want to enable and click **Register Capability**.

You can register the following capabilities:

- **Media Library:** By enabling Media Library, the partners, vendors or agencies can download published digital assets stored in the solution’s Digital Library. This eliminates messy file transfers and cumbersome physical copies by storing digital assets in a central location that agencies, vendors and other third parties can access and download. They do not have access to your central marketing operations system. Depending on the access given by the administrator, they can view and download selected digital assets.
- **Estimate:** Your approved vendors and agencies can submit estimates for a marketing project online via a well tracked and managed system. You can easily compare

offered rates as well as approve and select the winning estimate. Submit estimates or specify rates for completing a marketing project by entering the information online directly into the solution.

---

## Configuring the Asset Descriptor

When the assets or collections are laid out in the list view within the Media Library, additional information related to the assets or collections are shown next to it. The asset descriptor application allows the administrator to select the asset attributes from the asset business information. Click **Asset Descriptor** link in the left pane under Administration.

The asset descriptor application screen has the following sections:

- **Configure Asset Descriptor:** Select either the assets or a collection for which the attributes are to be displayed. Select the source from where the attributes are selected. You can associate the facets available in the drop down list.
- **Selected Attributes:** The selected attributes are displayed here. The attribute name and the source appears. In addition, these attributes can be provided with formatting information such as bold, italic and the color. The preview appears.
- **Select Attributes:** A list of attributes from either the selected facet or the digital asset appears. The attributes are displayed with the attribute name and description from the selected source. Select the attributes to be displayed by clicking the check box next to the attribute name and then clicking **Select**. The selected attributes appear in the Selected Attributes section.

After selecting the attributes save the settings.

---

## Order Management

*Note:* To download the assets, an FTP site should be configured.

The administrator, manages all the orders and its processing. When an order for assets is placed, the administrator can view the orders by clicking **Process Orders** link in the left pane. An order list appears. Click the order number link to view the order details. On the Summary screen enter the shipping details and change the status of the order to Delivered. The order is complete.

## Part 3

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# User Tasks

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## Chapter 26

# Understanding Dashboards

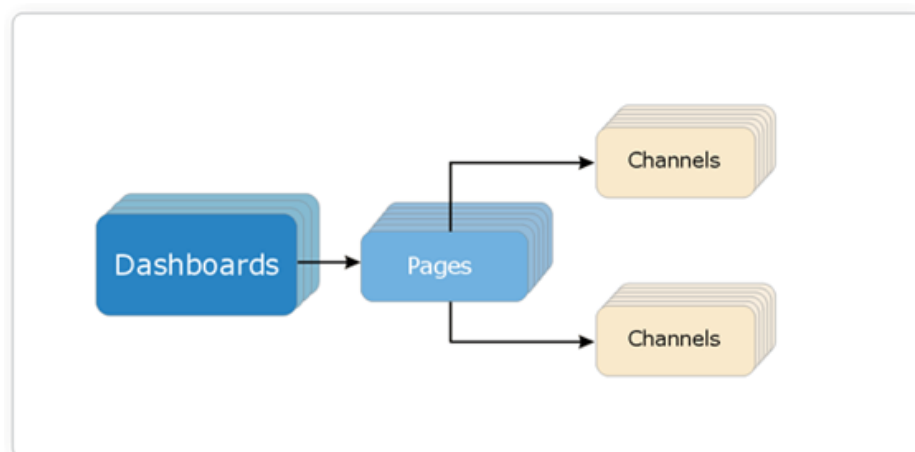
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## Overview

**Figure 26.1** Overview



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

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

---

## Getting Started

After logging on, the Dashboard appears by default.



The top bar has the company logo and the following links:

1. **Profile:** You can edit your profile.
2. **Sign out:** You can log off.

The left pane has links to different applications such as dashboard, strategic planner, marketing workbench, approvals, and so on.

The content frame displays a configured dashboard with configured pages and channels. 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 :

	<b>Personalize:</b> You can select the channels for the pages.
	<b>Refresh-</b> You can refresh the page content.

---

## Channel Selection and Layout

### Overview

You can lay out the channels on a page in any sequence. You can add configured channels or remove the channels from the page. You can also select the sequence of display for each channel on the page.


To select channels click  icon on the top right corner of the page. A Channel Layout popup appears. The popup has a tabbed display of the pages with the current selected page. Each page lists the channels selected.

Figure 26.2 Channel Layout

Channel Name	Channel Type	Set Maximize	Preview
<input type="checkbox"/> Projects Calendar	Calendar	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Latest assets cataloged in DAM	Digital Library	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> My Tasks - Resource	Calendar	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Marketing Calendar	Strategic Planner	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> My Tasks	Calendar	<input type="checkbox"/>	

Hide this page  Make this my default page.  
 Note: Use drag drop facility to change selected Page order.

Select Save Done

The following action can be done on the Channel Layout popup:

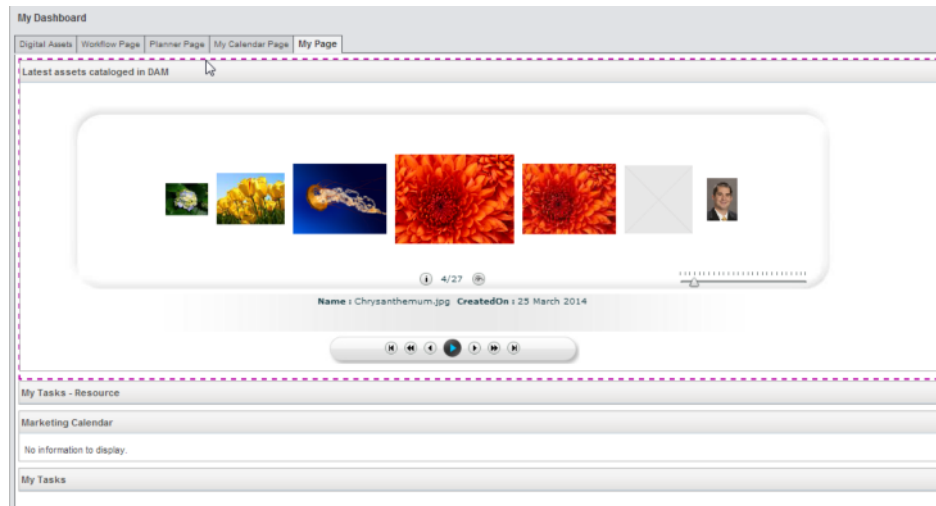
- **Set Maximize:** You can set the channel to be in a maximized state.
- **Preview:** You can preview the channel by clicking icon.
- **Hide this page:** If you check this option, then the page is hidden on the Dashboard.
- **Make this my default page:** You can select a page to be the default page.
- **Select:** You can select more configured channels to appear on this page.
- **Save:** After completing the personalization, you can save the changes.
- **Done:** Close the popup.

On the same popup, you can order the pages displayed on the Dashboard by the drag and drop method.

### Sequencing the Channel Layout on the Dashboard Screen

To sequence the channels on the page, use the drag and drop feature to position the channels at the appropriate location. Select a channel by clicking the channel title. When a four arrow icon appears, you can drag the channel to the desired location by keeping the left mouse key pressed. When the dotted lines appear, release the mouse button. This will position the channel.






**Figure 26.3** Sequencing the Channel




### 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.

**Table 26.1** Explaining the Icons

	<b>Refresh-</b> You can refresh the channel content.
	<b>Minimize-</b> You can minimize a channel, when in the maximized state. Visible only if the channel is in the maximized state.
	<b>Edit</b> — You can personalize the channel content.
	<b>Maximize-</b> You can maximize the channel when in the minimized state. Visible only if the channel is in the minimized state.
	<b>Delete</b> — You can remove the channel from the page.

### Channel Personalization

To personalize the channel click  icon, a Channel Personalization popup appears.

You can personalize the channel according to your requirements, provided the administrator allows personalization, for example:

1. On a Marketing Calendar channel, you can select which plans should appear on the Dashboard.

2. On a Digital Library channel where assets from a certain section are displayed, you 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.

## **Operations on Analytical Channels**

### **For a Strategic Planner Channel**

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.

You can view the following information for the analytical channels:

1. **Breakup of Planned and Spent Amounts (Financial Summary):** The following information appears 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.
2. **Marketing Calendar:** The marketing executives can see their marketing calendar on the Dashboard as soon as they log on 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. The following information appears for this channel:
  - The Plan Name: The user can click the plan title to view the plan, program or activity details.
  - A gantt chart view of the activity types in the plan, programs or activities are displayed with the activity type name on the gantt chart bar. To view the summary information such as start date, end date, budgeted, committed, spent and the unspent amounts of an activity type drag the mouse over the gantt chart bar.
  - A slider is available below the gantt chart to adjust the time period of the display.
3. **Marketing Plans:** In this channel, the following information appears in a graphical format:
  - The plan name and the business unit for the plan appears.
  - A pie chart representation of the unspent, committed and the spent amounts for the plan appears. Click the committed amount section for a list of all the commitments for the plan and all levels below it. Click the spent amount section for a list of all the invoices for the plan and all the levels below it. Click the unspent amount section for a list of the entire unallocated amount for the plan and all the levels below it.
  - The list of programs or campaigns associated with the selected plan appears in a tabular format. The program title, budgeted, committed, spent and unspent amounts are displayed for the list of programs or campaigns of the plan.

You can view the information in the form of a pie chart, bar chart or in the list view by clicking the relevant button. You can traverse to a particular plan and drill down to view

the activities associated with it. The information at the program or campaign level is also displayed in a similar format.

### **For Marketing Workbench**

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 appears on the projects calendar.

#### **Projects Calendar:**

In this channel the following information appears in a graphical format:

- When you drag the mouse over the gantt chart bar the summary information of the project appears. For the part of the bar that is completed, the summary information such as the % complete appears on the bar.
- You can drag the slider for a monthly, weekly and a daily representation of the projects gantt chart bar.
- Expand the project to see list of deliverables with a gantt chart view. Click the project name to navigate to the project details screen in the Marketing Workbench
- Expand the deliverables to see the list of tasks. Click the deliverable name to navigate to the deliverables details screen in the Marketing Workbench.
- Click the task name to navigate to the task details screen in the Marketing Workbench.

### **Operations on Digital Library Channels with the Carousel View**

The carousel view asset viewer enables you to view the digital assets in a carousel view. You can see the digital assets on the Dashboard as soon as they log on without having to go to the Digital Library module. You have the flexibility to explore deeper via the interactive clicking facility in this channel. Clicking the information icon, you can view the asset details. You can download the preview from this screen. A menu bar is available to view next, previous, first or last asset. You can personalize this channel.

*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 on without having to go to the Artwork Producer module. The formats viewer channel enables you to view the formats that are released in the Artwork Producer module in a carousel view or a list view.

This channel allows the users to navigate as well as view the formats. You can click and select a format for customization.

Rest of the operations are 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 the end date of the task.

The contributor can click the taskbar to go to the response screen of the task. The task links appear on the start date of the task. 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 the legend on the task calendar). The user can click the task name 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 have access to the appropriate channels.

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

The Executive Dashboard appears with first level of charts.

The following operations can be performed on the Executive Dashboard:

- **Filters:** Select the fiscal year and business units. The corresponding Dashboard is generated. You can change the filters to get different Dashboards.
- **Dashboard:** Four individual charts are displayed on the Dashboard using the filters specified by you. The charts are explained in detail below. The selected fiscal year and the business units, the date and time of generation of this Dashboard appears.

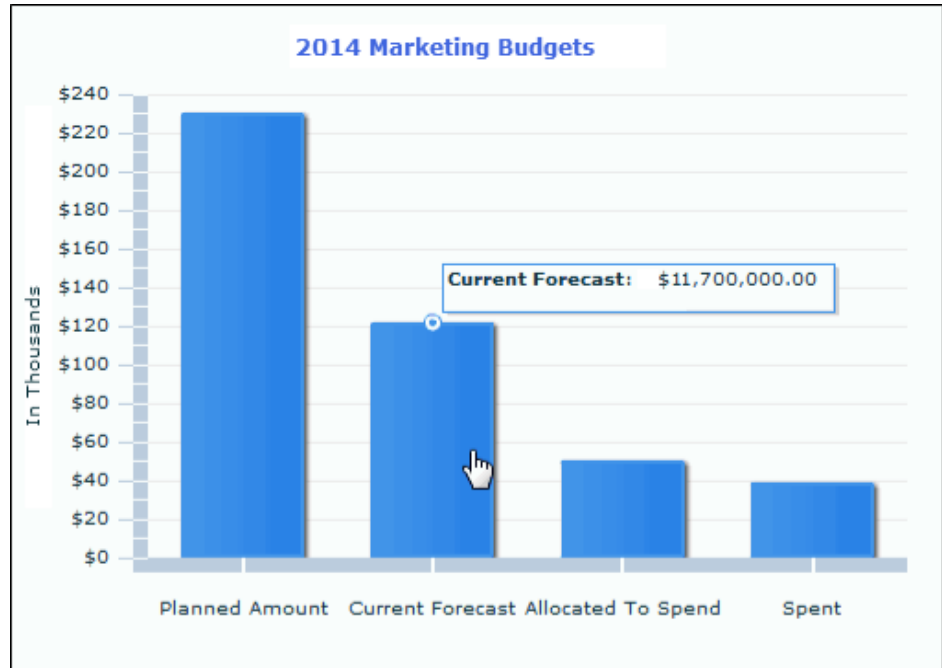
The following charts are displayed:

1. **Marketing Budgets:** This chart displays the budget for the selected business units or plans. This channel provides a summarized view of the annual planned amount, current forecast, committed budgets and actuals (for approved budgets) for a selected set of business units, line of business or 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 chart, the amount appears.

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

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

Figure 26.4 Marketing Budgets

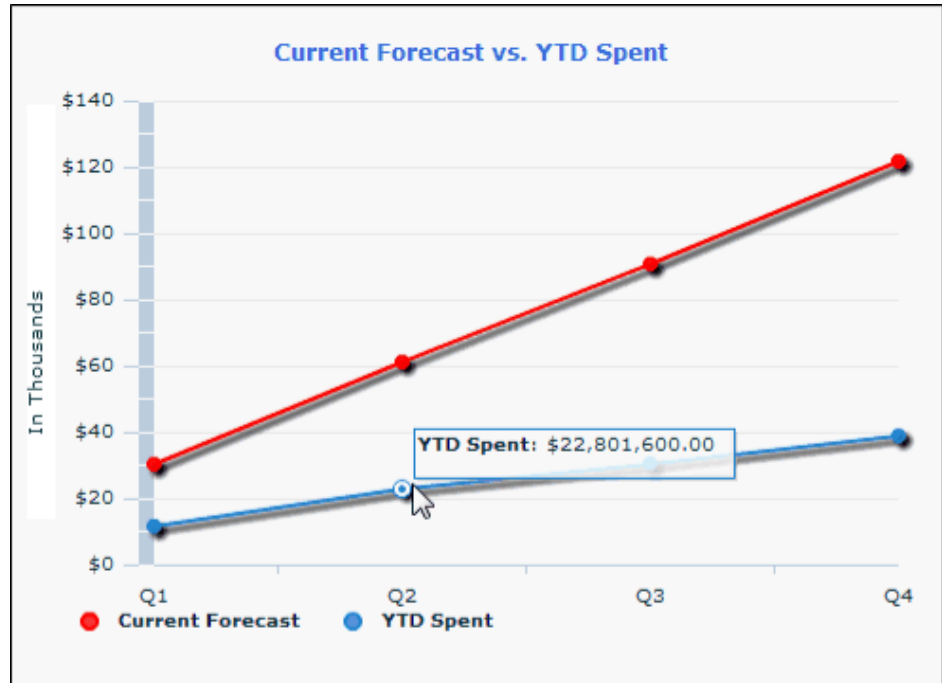



- Current Forecast versus YTD Spends:** This channel provides a cumulative view of the business unit, line of business or plan's current forecasts and spends over time. The increments in the chart will depend on the lowest and the highest values to be displayed. If the highest value is in millions, then the Y-Axis will display *In Millions* else will display *In Thousands*. The current forecast amount displayed 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 year-to-quarter spends. This is summarized across all the applicable plans. The data for the actual is counted in the quarter in which the data entry falls. If the entry corresponds to Dec 20, 2013, it is counted in 2014 Q1.

*Note:* No drill down is supported for this channel.



Figure 26.5 Current Forecast versus YTD Spends

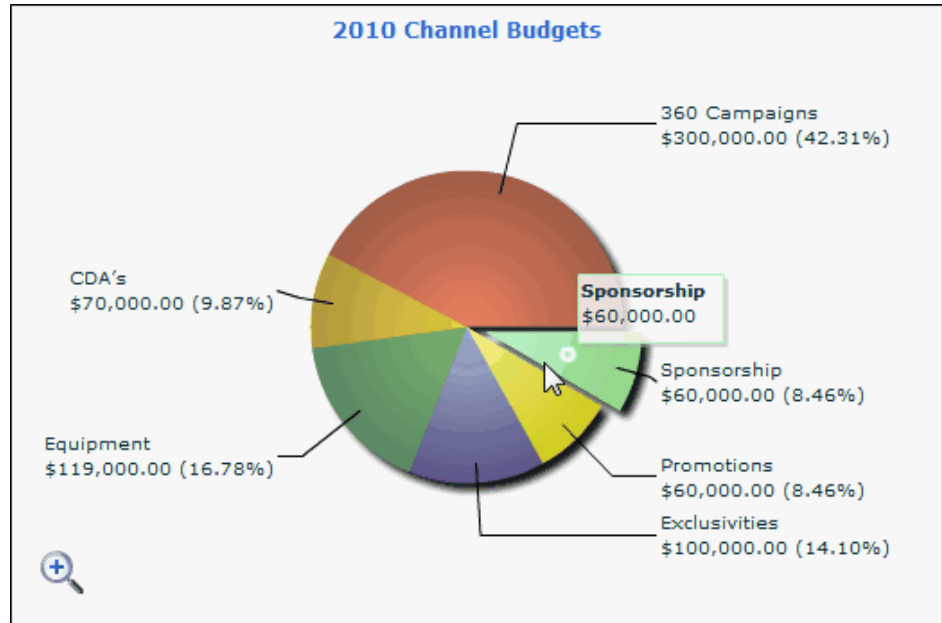



3. **Channel Budgets:** This channel provides a summary of the current planned channel budgets for the selected business unit and associated hierarchy or line of business for the selected year or for a single plan selected by the user. It gives a view into the funds available for a channel that can be further divided across various programs and campaigns. If you select a business unit at a higher level, a sum of all activity types from the lower level business unit hierarchies and plans are displayed. The information displayed here is an aggregation of the current planned amounts for all the activity types across all the selected set of business units, line of business or plans for the selected fiscal year. By clicking  icon, you can view a magnified

view of the chart.

*Note:* No drill down is supported for this Dashboard channel.

Figure 26.6 Channel Budgets



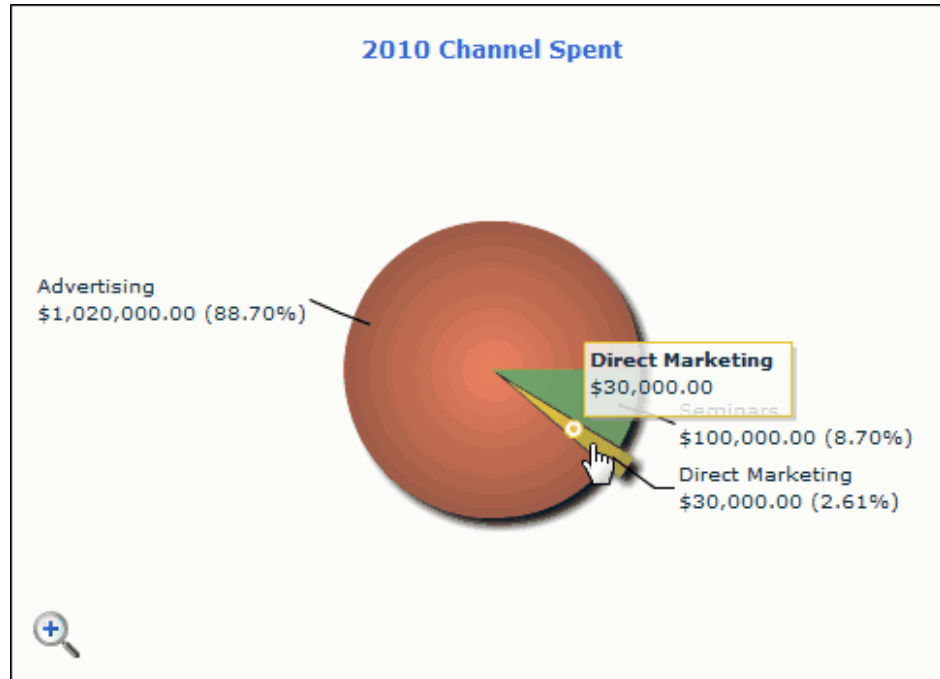
4. **Channel Spent:** This channel provides a summary of the channel spends (actuals) for a selected business unit and associated hierarchy, line of business for the selected year or for a single plan selected by you. It is an aggregation of actuals (spent for an approved budget) for all the activity types under the plan or line of business. If a business unit is selected at a higher level, the sum of actuals for all activity types from all lower level business unit hierarchies and plans are displayed. Negative numbered activity types are excluded from the pie chart. The information displayed here is a roll up of the spent amounts 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 or plans for the selected fiscal year. By clicking  icon the user can view a magnified view of the chart.

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

A first level drill down displays the aggregated actuals (spent amount) per activity sub-type when you click 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 provides cost-category breakdown of the actuals.

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

Figure 26.7 Channel Spent



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

The **Monthly Resource Allocation per Category** graph is shown on the Executive Dashboard.

The following details are shown:

- Monthly Resource Allocation per Category graph is a line graph and appears in the Marketing Budgets channel.
- By default the graph appears in this channel and can be turned off based on the channel personalization.
- The monthly allocation graph appears for the selected plan in the channel personalization.
- The graph shows the sum of the allocations done at that level, for example, at the plan level the graph shows the sum of all the allocations that are done for all the programs and all the activities under it.
- If you drill down to any specific program, the graph shows the sum of all the allocations done for the program and all the activities under it
- Legend appears beside the graph and it displays the resource categories and the colors used to represent them on the graph.



## Chapter 27

# Understanding Calendars

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## Calendars

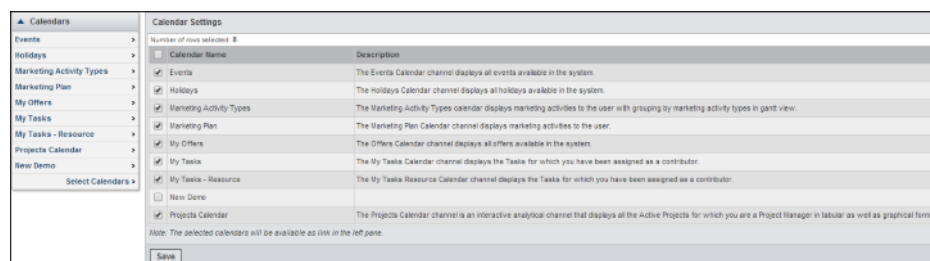
### Overview

Calendars are tools that help publish the marketing plans, programs, activities, events, offers, holidays, and so on, to all concerned in a graphical manner. The users who belong to the permitted groups for the respective channels can view these calendars. You can configure the calendars using the Calendar admin tool, through the predefined channel configuration. A user viewing the calendars can create multiple personalized views of the calendar. The user can also switch between the configured dates on the same view.

### Getting Started

Click **Calendars** link on the left pane. When the user logs in to the system for the first time, you need to select the calendars from a list of calendars that are configured by the administrator. The links to the calendars that you select, appear on the left pane.

**Figure 27.1** Calendar List

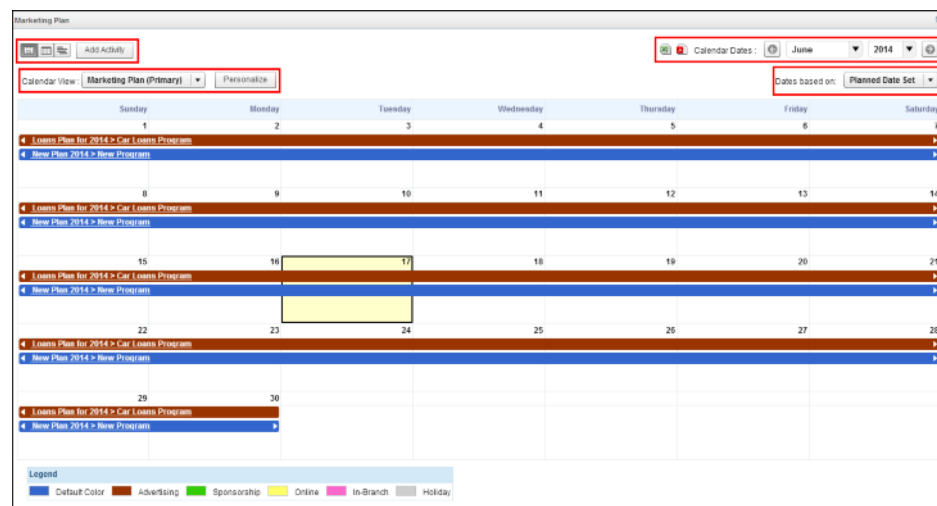


Examples of the Marketing Plan Calendar are explained in detail below. The administrator can configure different types of calendars. The interactions explained below is the same for all the calendars created by the administrator.

## Marketing Plan Calendar

The marketing plan calendar shows the marketing activities based on the In Market Start date and End date. You can view the activities for which you have access and click the activity bar for more details. If you have a Write access to the activity, then the activity details appear in an editable format and you can edit the details or delete the activity from the calendar. If you have Read access on the activity details are displayed in a Read-Only mode. The Complete Access groups for Plans have a complete access on all Plans in the system and can access all the Plans from the Calendars as well.

**Figure 27.2** Marketing Plan Calendar



You can perform the following actions on the calendar:

1. You can view a monthly or a weekly view of the calendar. You can also view the calendar in a gaunt chart view which displays a hierarchical view of the plan or activities.
2. You can add more activities to the calendar. Click **Add Activity**, the activity details popup appears. Enter the details for the new activity. By clicking **More Information**, you can view the activity details in the Strategic Planner. The **Add Activity** button on the Marketing Plan calendar on the top left is visible if you have access to at least one Plan in the Strategic planner. If you do not have access to any plans, the button is hidden as you cannot add activities.

Figure 27.3 Add Activity

**Activity Details**

Activity Details

\* Parent for Activity: Loans Plan for 2014

\* Activity Title:

Activity Type: Advertising

Activity #: 1023

\* Planned In-Market Start Date:

\* Planned In-Market End Date:

3. You can export the calendar in an excel or PDF. In an Excel, specify the range of months and it can be grouped by month. In a PDF, specify the range of months, you can include or exclude the legends. You can specify the orientation, range details, page size, page scaling and the positions or margins.

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

4. You can view the activities for different months and years.
5. You can personalize the view of a calendar that is setup by the administrator of the system, for example, an end user can personalize the marketing activity calendar with specific activity types such as *Advertising* and save this view with a name. You can switch between the planned and the actual dates in the same view. Click **Personalize**, a channel personalization popup appears. Select the filter, and set the display settings. Refer to the following steps on creating views:

Figure 27.4 Channel Personalization

- a. 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.
  - b. Create several views with different combinations of filters. You can switch between these views.
  - c. Switch between the configured date sets in the same view and see your activities on a calendar based on the planned dates. You can see the actual dates for the same set of activities.
  - d. 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
  - e. Quickly go to the last modified view in the view list identified with a suffix.
  - f. Find other views easily as they are sorted alphabetically based on the view name.
  - g. Click the **Restore Default**, to clear all settings on a particular view and restore it to what the administrator configured.
6. A + sign appears if there are more activities for a particular date. By clicking on the link the list of activities for that particular date are displayed.

## Events and Holidays

You can configure separate calendars for event and holidays or you can add the events and holidays on other calendars. Holidays are added by the administrator. The end user cannot add holidays. The end user can add events to any calendar and on the events calendar as well.

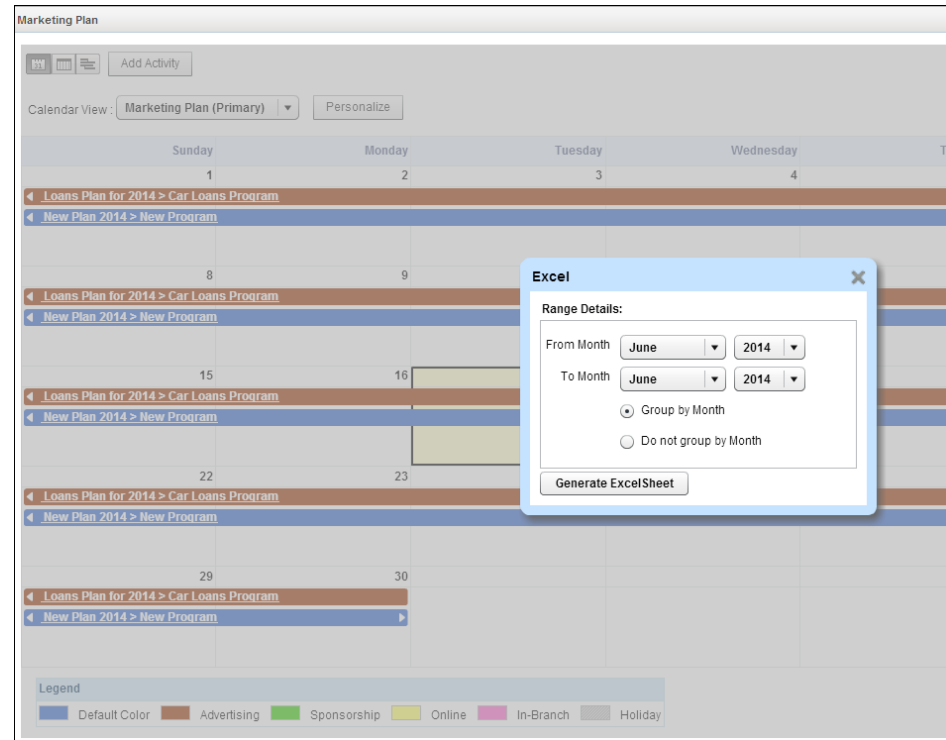
## Exporting Calendars

You can export all calendars to Excel or PDF.



- Excel: Select the range that is the from and to months. Select is you want it to be grouped by month and generate an Excel Sheet.

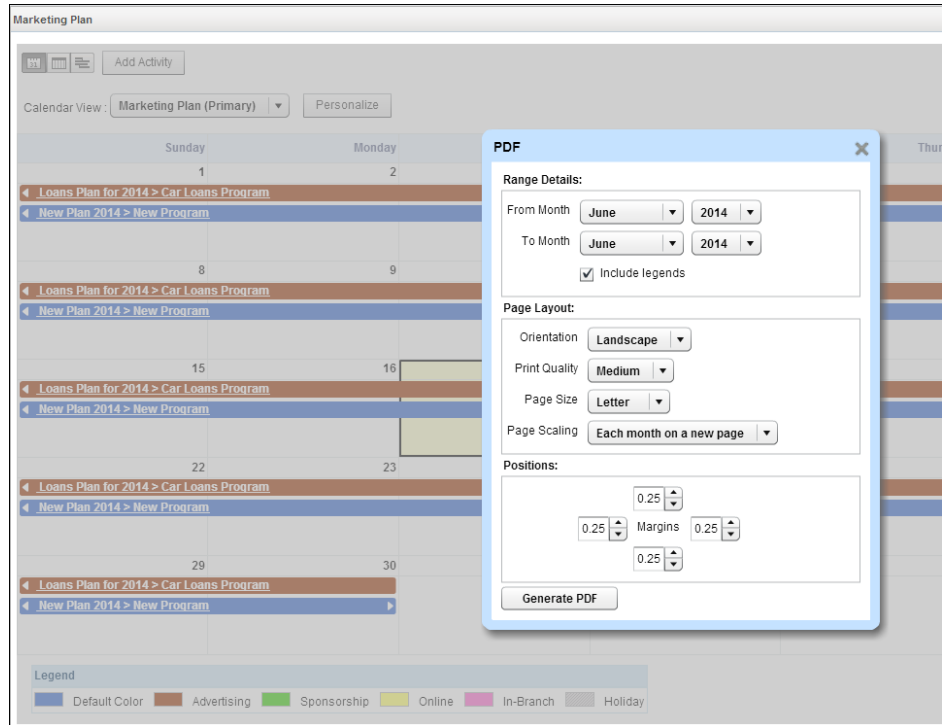
**Figure 27.5** Export to Excel



- PDF: Select the range that is the from and to months. Select the page layout such as orientation, print quality, page size and page scaling. Select the positions and generate the PDF.

*Note:* Report for large data cannot be generated with the **Fit to page (month wise)** option. Use this option for smaller amount of data.

Figure 27.6 Export to PDF



## Chapter 28

# Understanding Strategic Planner

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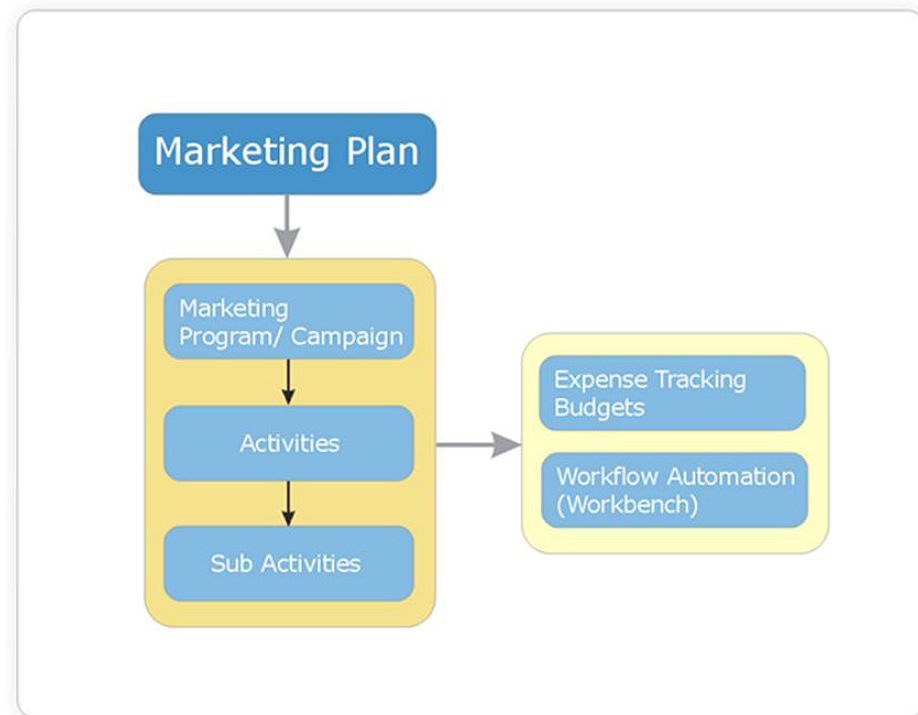
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## Overview

**Figure 28.1** Overview



Using the Strategic Planner, the marketing teams and managers can create plans, campaigns and associated activities. They can define the activity types and specify the planned amount for the activity. They can define the objectives and the target groups for particular activities. They can select the product to which the activity is applied.

Strategic Planner is closely integrated with Marketing Workbench and the Budget Manager, making it easier for an organization to track 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.

---

## User Roles in Strategic Planner

The user roles in Strategic Planner are as follows:

- **Plan Owner:** The plan owner or creator has complete access (read, write and delete) on the plan. This user has Read access on all the levels below unless this user is added explicitly to 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 and invoices in the expenses tab from the budget manager view. A budget manager with access to higher levels 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 the user is added to any role that has complete access at lower levels.
- **Marketing Coordinator:** The marketing coordinator is responsible for the marketing activity (program, campaign and activity) and its execution. The user has complete access (read, write and delete) on the marketing activity. This user has Read access on all the levels below, unless the user is added explicitly to any role that has complete access at lower levels.
- **Readers:** Stakeholders of the plan who have access to view the plan. Readers are also present on the activities. A reader at a higher level has Read access to all the lower levels, unless the user is explicitly added to 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 not 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. This user has equal rights as the estimate creator who can edit, change, approve the estimate, and so on.

---

## Getting Started

After logging on, the Dashboard screen appears. In the left pane click **Strategic Planner** link.

The Strategic Planner solution is launched with applications related to strategic planner. Links such as plans, budgets, reviews and bulk changes are available on the left pane. A list of existing plans is displayed by default. You can search for a particular plan by selecting the filters and clicking **Search**.

**Navigation Tips:** Each screen, which describes details of the plan, program, campaigns and activities, have 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.

---

## Creating and Organizing Plans

### Plans Overview

After launching the Strategic Planner solution, a View Plans screen appears by default. By default, you see all the plans, you have access to. You can search for plans by entering the search criteria on this screen. All the plans fulfilling the criteria are displayed in the plan list.

From the View Plans screen, you can delete, copy and create a plan.

### Making a Copy of an Existing Plan

Select the plans that you want to copy and click **Copy**.

A Copy Plans screen appears. You can edit or change the details as follows:

- **Title:** You can change the plan name.
- **Business Unit:** You can select the business unit from the drop down list.
- **Fiscal Year:** If the fiscal year setting is set to true by the administrator, then you can change the fiscal year. If the fiscal year setting is set to false, then the *Advance dates by year* option is available to you.
- **Currency:** You can select from the drop down list.
- **Copy Options:** You can specify whether all the levels, only the programs, only the activities or only the sub activities should be copied.
- **!**: Click this icon to see more information. A Select More Options popup appears. You can select what you want to copy at all the levels of the plans. You can select information such as attachments, cost centers, forecasts, scorecards, and so on.

While copying a plan the following details are copied:

**Table 28.1** Plan Level

At the Plan Level:	
Field	Explanation
Objectives	Objectives selected for the plan
Attachments	Attachments of the plan, for example, reference documents

<b>At the Plan Level:</b>	
<b>Field</b>	<b>Explanation</b>
Cost Centers (Budget Allocation)	If the setting for Business Unit specific Cost Centers is set to true and you change the Business Unit, the cost centers are copied if they are present in the selected Business Unit else nothing is copied.
Forecast	Forecasts are copied only if the Cost centers are copied.
Scorecard: Measurements and KPIs	Only the expected values are copied and not the actual ones. The dates that are copied are advanced by a year of the original plans.
User Roles or Groups	All user roles including Plan Universe are copied. If the Business Unit is changed, then the default authors and readers of the new Business Unit are copied
Additional Facets	Any additional facets associated with the plan

While copying an activity the following details are copied:

**Table 28.2** Activity Level

<b>At the Activity Level:</b>	
<b>Field</b>	<b>Explanation</b>
Activity Type	The channel for which the activity is created.
Planned In-Market Start or End Date	The dates are advanced by a year of the original activity.
Actual In-Market Start or End Date	The dates are advanced by a year of the original activity.
Activity Number	The number is auto generated.
Currency	The currency selected at the plan level is 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.

At the Activity Level:	
Field	Explanation
Objectives	Objectives selected for the marketing activity.
Attachments	Attachments of the marketing activity, for example, 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 are copied and not the actual ones. The dates that are copied are advanced by a year of the original plans.

### Creating New Plans

To create a new plan click **New**. A Create Plan screen appears. Enter the plan title and description can be entered. Select the business unit, currency, fiscal year and plan status. You can upload relevant files by clicking **Add** in the attachments section.

Save the plan.

After creating and saving the plan, a View Plan screen appears with the plan details in a tabbed view explained below in the next section.

### Viewing Existing Plans

The View Plan screen has the following tabs:

- **Information:** The details such as plan title, description, business unit, currency, fiscal year, plan status and last updated on are displayed.

You can do the following operations in the Information tab:

- You can edit the plan details by clicking **Edit**.
- You can create and save a version of the plan by clicking **Save Version**. 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 can create a version for the plan, authors do not have the access to create versions. The administrators can give the authors Edit access to the plan which allows the author to edit the plan and create a version.
- You can specify the plan objectives by clicking **Add** and selecting from the predefined objective list in the Objective section.

*Note:* In the lower levels of the plan, you can select from the objectives selected at the plan level only. If you delete the objectives at the plan level, the objectives at all the lower levels are automatically deleted.

- You can add attachments to the plan by clicking **Add** in the Attachments section.



- You can view the changes made in the plan information by clicking **View Audit History** link.
- **Programs:** By default all the programs created under this particular plan are displayed. You can search for specific program using the filters and clicking **Search**. Add new programs by clicking **Add**. View the activities under this program by clicking the program title link.
- **Budgets:** The financial information such as the currency (the currency of the cost center appears), 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. Add new cost centers by clicking **Add/Edit**. Select the cost centers and specify the planned amount for the selected cost centers. Add forecast attributes by clicking **Edit Forecast**. You can forecast the expenses. You can do the budget reallocation in bulk in the sandbox or bulk changes mode by clicking **Edit Bottom Up**. Refer to “[Budget and Forecast Re-allocation](#)” on page 227 for more information.
- **Scorecard:** This section has information about measurements and KPI lists. The measurements have the expected and actual values, start and end dates for the program and the frequency. Add new measurements by clicking **Add**. You can edit all the measurements with the frequency as one time and having only one actual value slot by clicking **Edit**. You can edit the measurements with the frequency more than one time individually by clicking the measurement name link. The KPI list appears with the key performance indicator, expected and the actual values and can be recalculated by clicking **Recalculate**. If you make any changes to the measurements such as add, edit or delete, on the view plan, program or activity screens in the scorecard tab, the system automatically recalculates the KPIs and an explicit message appears.  
*Note:* Click **Recalculate** for the system to recalculate any KPIs that are based on budgetary values.
- **Reviews:** You can initiate a review for the plan by clicking **Initiate Review**. A Create Plan Review screen appears. Enter a title and instructions. Upload files and invite users or groups for the review. You can view the reviews in this tab.
- **User Roles:** You can see the users who have created and updated the plan. Add or delete the authors, budget managers and readers for the plan. You can view the access of each selected user by clicking **View Access**.

If the administrator sets the plan universe setting to true, then you can select the groups and users for authors and readers from the plan universe.

If the hierarchy of programs, campaigns or activities already exists under the plan, then during the add author or reader interaction, select one of the following options:

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

While deleting a user at a particular level in the plan, options to either delete the user from the current level only or from all the levels below are available. Depending on the option selected by you, the operation is performed. This display of options is based on a setting in the Planner Settings.

You can add a budget manager at the plan level. If the setting for user role propagation is set to true, then during program, campaign or activity creation under the plan the user is propagated from the parent level.

In case the Plan Universe Access is set to True, then you can add the Plan Universe users as authors or readers.

When a plan is created and a business unit is selected, the default authors and readers selected by the administrator for the business unit are automatically populated as authors and readers. 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 distinguish them from the authors and readers added for the plan.

- **Resources:** The allocated resources for the plan are displayed in this tab in the form of a calendar. You can request for resources using the **Resource Request** link on the left pane of Strategic Planner. You can configure and include a Resource Forecast as a part of the planning process. You can enter the Forecast per Category of resources for each activity in the plan. You can enter these per forecast duration as defined in the system, for example, enter a monthly requirement of designers for a particular activity.

*Note:* There can be a need for having an overlapping forecast duration. There is no validation for it. You need to make the check manually while adding forecasts.

- **Version:** The versions for the plan are displayed with details such as created date, creator and comments.

*Note:* After the plan is created with all the details such as programs, budgets, scorecards, user roles and resources, you can view it in another currency if required. The currency selected during the creation of the plan is the standard currency throughout the plan. If a user needs to view the plan in another currency, click **Select Currency** on the left pane. The plan appears in a Read-Only mode in the currency selected. The system takes care of the exchange rates depending on the rates entered in the system.

## Clone and Replace Users

1. **Clone User:** You can add a new user to a plan with the same access rights as an existing user by using the **Clone User** feature. The cloned user has the same access rights as the previous user to a plan and all the programs, campaigns and activities under it. You cannot clone Marketing Owners as it is a role associated with a single user. For the Budget Managers role, cloning is based on the setting whether it is a single user or group selection of budget managers. Cloning is possible for author, reader, and activity coordinator user roles.

To clone a user click **Clone User** link on the left pane of the View Plan screen. A Clone User screen with the plan details appears in a read-only format. Select the new user and the user whose right should be given to the new user from a list of users. If the plan universe is set to true, the list displayed contains the users from the plan universe else all the users from the system are displayed. The new user has the same access rights as the selected user. Save the cloning by clicking **Save**.

2. **Replace User:** You can replace a user with a specific role in the plan and all the programs, campaigns and activities with another user having the same access rights using the **Replace User** feature.

Click **Replace User** link on the left pane of the View Plan screen. A Replace User screen with the plan details appears in a read-only form. Select the user that you

want to replace. If the plan universe is set to true, the list displayed contains the users from the plan universe else all the users from the system are displayed. The access rights of the user to be replaced are transferred to the replaced user. Save the replacement by clicking **Save**.

---

## Managing Programs, Campaigns and Activities

### ***Overview of Programs, Campaigns and Activities***

For a given plan, list of programs is found under the Programs tab on the View Plan screen. Alternately, to view existing programs or activities across all the plans click **View Activities** link on the left menu.

You can search for activities using the filters provided. You can enter multiple activity number separated by commas. A contains search is done for number entered. The searched programs or campaigns are displayed with details.

Each program, campaign and activity title has a link which takes you to a screen which gives detailed information about the programs, campaigns and activities.

### ***Adding New Programs, Campaigns and Activities***

Here is the hierarchy under Plan:

1. To add a new program traverse into a plan and select the Programstab on the View Plan screen.
2. To add a campaign traverse into a program and select the Campaigns tab on the View Program screen.
3. To add an activity traverse into a program and select the Activities tab on the View Campaign screen.

List of programs for the plan is displayed with all the details.

*Note:* When creating a program, campaign or activity, there is a step where you must select a template. If no templates are configured, then the template section is not displayed. If more than one templates are configured, then this section appears to you.

**Figure 28.2** Create Program

To add a program click **Add**, a Create Program screen appears (after template selection, if templates are present). Enter 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. The program# (number is auto generated or you can enter manually depending on the configuration) and the currency used for this program appears. You can select the marketing owner by entering 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 marketing owner selected at the program or campaign level is propagated to the campaign or activity created under it. You can add or select the attachments from the Digital Library under the attachment section.

Save the program. After saving the new program or campaign, a View Program screen appears with the program information. The view program screen has a tabbed layout with information for the program grouped under various tabs as described in the section below.

## **Program, Campaign or Activity Information**

### **Details in the Information Tab**

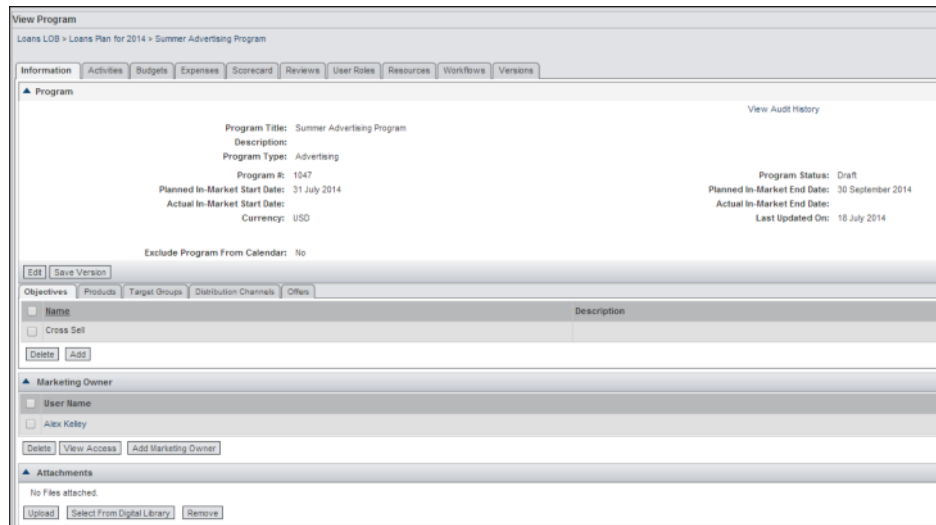
Information such as program title, description, program#(number), program status, planned in-market start and end date, actual in-market start and end date, currency and last updated on are displayed. You can edit these details by clicking **Edit**. You can create versions of programs, campaigns or activities by clicking **Save Version**. The Versions tab lists all the versions created for the activity. The activity creator and marketing owner can create versions.

Other information related to objectives, products, target groups and distribution channels are grouped under tabs. You can view and update each information by traversing to the relevant tab.

You can add or delete attachments if any in the Attachments section.

You can click **View Audit History** link to view the details of the changes made in the program, campaign or activity information.

**Figure 28.3** Details in the Information Tab

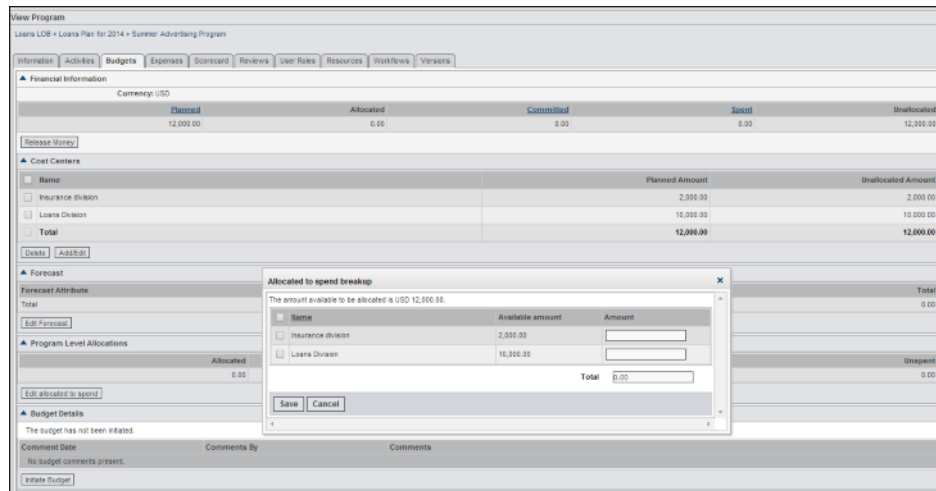


**Details in the Campaigns or Activities Tab**

You can search for campaigns or activities under this program or campaign respectively by using filters such as status, campaign or activity type, planned start date (from and to) and the title. The searched campaigns or activities are displayed with details such as title, type, # (number), status, planned start and end date and the planned amount. You can add new Campaigns or Activities by clicking **Add**. You can move a particular activity to another program by selecting the activity and clicking **Move**.

**Details in the Budgets Tab**

**Figure 28.4** Details in the Budgets Tab



The following information appears here:

- Financial Information:** Information such as the finance planned, allocated, committed, spent and unallocated amounts are displayed. You can add a budget manager if the setting for user role propagation is set to true. During program, campaign or activity creation under the plan, the user is propagated from the parent level. You can release the money by clicking **Release Money**. The unallocated or unspent amount of this program is released to the plan. You can release the money completely or partially to the parent level.

Figure 28.5 Release Money

Release Money

Type of Release:  Complete Release,  Partial Release

Allocations for: Summer Advertising Program

Release of Unallocated Amounts			
	Planned	Allocated	Unallocated
Current Values	12,000.00	0.00	12,000.00
After Release	0.00	0.00	0.00

Cost center breakup for unallocated amount			
Name	Current Allocated	Amount to release	After Release
Insurance division	2,000.00	2,000.00	0.00
Loans Division	10,000.00	10,000.00	0.00
Total	12,000.00	12,000.00	0.00
Required Total	---	12,000.00	0.00

Impact on Plan: Loans Plan for 2014			
	Planned	Allocated	Unallocated
Current Values	150,000.00	122,000.00	28,000.00
After Release	150,000.00	110,000.00	40,000.00

Release Cancel

- **Cost Centers:** Information such as the name, planned amount and the unallocated amount are displayed. Click **Add** to select the new cost centers and add the planned amount for each of the selected cost centers.
- **Forecast:** This tab is available only if the administrator enables the forecast feature. You can set the forecast duration to monthly, quarterly or annually. You can also set flexible forecast durations per fiscal year as per your business needs. Information about the planned expenditure for the fiscal year appears. You can edit the forecast by clicking **Edit Forecast**.  
*Note:* There can be a need for having an overlapping forecast duration. There is no validation for it. You need to make the check manually while adding forecasts.
- **Program Level Allocations:** Activity level allocations are displayed here with details such as allocated to spend, committed, spent and the unspent amounts. Click **Edit Allocated to Spend** 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 **Initiate Budget**. After initiating the budget, details such as the budget initiated on and by are displayed here. The Budget Manager's comment date, name and the comments are displayed. Initiate the budgeting process. You can initiate this process either by the budget manager or self-approving the budget as the budget is pre-approved (if you are also the budget manager)

### Expenses Tab

The Expenses tab is not visible if the setting for displaying commitments or invoices and estimates is set to false. The estimates, commitments and the invoices are displayed in this tab. 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.

You can add new estimates, commitments and invoices by clicking **Add**. To edit each estimate, commitment and invoice by clicking the title.

You can initiate the batch reconciliation process by clicking **Batch Reconciliation**. You can reconcile the invoiced amount with the actual paid amount for the program through the batch reconciliation process.

Details in the Expenses Tab are as follows:

- **Estimates:** The Estimates section appears if the **Display Estimates** setting in Strategic Planner administration is true. The list of estimate approvals jobs in the review screen is also displayed or hidden depending on the setting.

You can do the following operations for estimates:

- **Delete:** Delete a selected estimate. When an estimate is deleted, an e-mail notification is sent out to all the coordinators.
- **Copy:** Copy a selected Estimate. You can copy multiple Estimates from the list of estimates. Copy Estimates is an offline process. Once the Copy Estimates transaction is completed, an e-mail notification is sent to the user. The user is informed of the status of the copied Estimates (either Success or Failure). The status of the newly copied Estimates is Draft by default. The Estimate#(number) is auto generated. You can update the Estimate Title, Type, Effective and Expiration Dates
- **Add:** Add new estimates. An estimate details screen appears. Refer to [“Adding Estimates” on page 215](#) for more details.
- **Refresh:** Refresh the section with the changed values.
- **Revise:** Revise the selected estimate. You can revise the expired estimates only. Refer to [“Expired Estimates” on page 216](#) for more details.

*Note:* While copying or deleting an estimate the system checks to see whether the Plan to which this estimate belongs to is in the Bulk Update mode (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 deleted.

- **Commitments:** Click **Add** to add new commitments. A Create Commitment screen appears. Refer to [“Adding Commitments” on page 218](#) for more details.

You can copy an existing commitment activities by clicking **Copy**. Refer to [“Making a Copy of Existing Commitments” on page 218](#) for more details.

You can see a list of all the commitments for which you are the creator by clicking **View Commitments** link on the left pane. From here the copy commitment interaction is also available.

- **Invoices:** You can add invoices either against a commitment or against the Program or Campaign. You can add invoices to closed activities depending on the configuration in the system. The default setting does not allow you to add invoices to closed activities.

To add an invoice against an existing commitment, traverse to the View Commitment screen by clicking the commitment name link. In the Invoices section of the screen, add invoices by clicking **Add**. These invoices are generated against the commitment. You can add invoices for expenses for the program, campaign or activity as well. A Create Invoice screen appears. Enter the invoice details. After the invoice is created, you can reconcile it if it is paid. Click **View Invoices** link in the left pane, to view a list of all the invoices for which you are the creator. Here the batch reconciliation operation is also available.

### **Scorecard Tab**

When you view this section for the first time, you need to set the Default Metric by clicking **Set Default Metric**. The Scorecard tab has the measurements and performance indicators information. The measurements have details such as the name, expected and actual values, measurement start and end dates for the Campaigns and the frequency.

Add new measurements by clicking **Add**. You can edit the measurements with the frequency as one time and having only one actual value slot. You can edit the measurements with the frequency more than one time individually by clicking the measurement name link. The performance indicators are displayed with information such as expected and the actual values. You can recalculate by clicking **Recalculate** after making the changes to the measurements. If any changes are made to the measurements, on the View Plan, Program or Activity screens in the Scorecard Tab, the system automatically recalculates the KPIs and gives an explicit message.

*Note:* You need to click **Recalculate** for the system to recalculate any KPIs that are based on budgetary values.

### **Reviews Tab**

This section displays the title and status and allows the user to view the reviews for the programs, campaigns and activities. To initiate a review click **Initiate Review** and invite users or groups for the review.

### **User Roles Tab**

The details such as created and last updated by are displayed. 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 these users are added as activity coordinators in the program, campaign or activity level. You can add new users by clicking **Add User**. You can view the access level of each user by selecting the user and clicking **View Access**.

### **Resources Tab**

The allocated resources for the plan are displayed in this tab in the form of a calendar. You can request for resources using the Resource Request link in the left pane.

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

*Note:* There can be a need for having an overlapping forecast duration. There is no validation for it. You need to make the check manually while adding forecasts.

### **Workflow Tab**

You can initiate and associate a Brief or Project to an Activity or Program. The Workflows Tab for an Activity has the Projects and Briefs that are associated with the selected Activity (depending on the configuration settings done by the administrator).

You can do the following operations in the Workflow tab:

- **Initiate Project or Brief:** Initiate a new brief or project for the activity.
- **Associate Brief or Associate Project:** Associate an existing brief or project.
- **Disassociate Brief or Disassociate Project:** Disassociate a project or brief.

You can do the following for the briefs:

- **Copy Brief:** You can copy a selected brief.



- **Search and Copy Brief:** You can search and copy for existing briefs into the activity. A Search and Copy Brief popup appears. You can search for the briefs by entering filters.

You can copy a brief only if the following criteria are fulfilled:

- Complete access required is True and you have complete access. Complete access required is False or you do not have this access, then you should either be the creator, coordinator or marketing owner.
- 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. The version created when you save a version the Information tab is seen in the Versions tab.

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## **Moving Activities across Programs or Activities**

You can move activities from one program to another within the same plan. The whole hierarchy is not moved. You can move activities of any level to a different program or activity but at the same level within the Plan. You cannot move activities from one plan to another.

Select the activity and click **Move** and select the program where you want to move the activity and click **Select**.

After the activity is selected, the Impact of Move Activities screen appears with the amounts that are affected. Click **Move**.

To move an activity, do the following checks:

- **Cost Centers and Financial summary:** You can select the cost centers at any level only from the ones selected at the parent level. You cannot move an activity, if one of the cost centers present at the activity level is not present at the new parent program. For moving such activities, add the cost center manually to the destination parent or delete the cost center from the entire sub-hierarchy of the activity to be moved.
- **The total planned amount of the moved activity should be available at the new parent program:** In order to move an activity in this case, the planned amount at the destination should be increased. Even if the cost center is selected for the destination parent, the unallocated amount for the cost center at that parent should be more than or equal to the amount allocated for the cost center of the moved activity. If the cost center at the parent level does not have enough amount, the activity cannot be moved. To move the activity, you should increase the cost center allocation.
- **Forecasting:** To move the activity, you should remove the forecast attribute from the activity 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 is deducted from the destination parent's forecast from the appropriate bucket. If sufficient amount is not present in the bucket, then you cannot move the activity. In order to move the activity the forecast allocation should be increased at the destination parent, for that forecast attribute.

**Table 28.3** 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	Add the amount for each of the cost centers to the unallocated amount of the parent for that cost center.	Subtract the amount for each of the cost centers in the activity from the cost centers.	No change	No change
Financial summary values	<ul style="list-style-type: none"> <li>• The roll-ups for allocations is added to the parent's roll up values.</li> <li>• The expenditure roll-ups is subtracted.</li> <li>• These changes are propagated right to the level in the parent hierarchy.</li> </ul>	<ul style="list-style-type: none"> <li>• The allocation roll-up values is subtracted from the parent roll up values.</li> <li>• The expenditure roll is added.</li> <li>• These changes are propagated right to the level 1 in the parent hierarchy.</li> </ul>	No change	No change
Activity Path	No change	No change	Changes to reflect the new parent.	Changes to reflect the new parent.
Forecast	<ul style="list-style-type: none"> <li>• Remaining totals change.</li> <li>• The totals for the attribute increase by the amount of the attribute.</li> <li>• The forecasted total decreases.</li> </ul>	<ul style="list-style-type: none"> <li>• Remaining totals change.</li> <li>• The totals for the attribute decrease by the amount of the attribute.</li> <li>• The forecasted total increases.</li> </ul>	No Change	No Change

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## Estimate Management

### Overview for Estimates

The framework to create estimate projects, resources, out-of-pocket expenses, and so on, 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 regard to the following:

- Annual SOW or Staffing Plan creation and corresponding online approvals
- Ongoing SOW modifications and corresponding approvals, if applicable
- Tracking of monthly agency actuals
- Report generation

### Adding Estimates

To add estimates click **Add** in the estimates section (in the expenses tab). The Estimate Details screen appears.

Enter the following details:

- **Title:** 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:** Select the type, either annual or project.
- **Effective Date:** The date on which the estimate is effective from.
- **Expiration Date:** The expiry date of the estimate.

You can view the vendors belonging to your Business Unit only. Enter the following vendor details:

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

For adding the work items to the estimates save the estimate by clicking **Save**, a View Estimate Details screen appears. Add the Estimate Coordinators. The Estimate Coordinator has the same rights as the Estimate Creator. The Estimate Coordinator can edit, change, approve the estimate, and so on. Submit the estimate to the vendor.

You can do the following operations for **Work Items**:

- You can add the work items to the estimates by clicking **Add**.
- You can make a copy of the selected work items and clicking **Copy**. 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. You can update work item title, category, type and the strategic value. Work item# is either auto-generated or you can enter it manually.

- Multiple users cannot work on the same Work Item simultaneously. If you are editing the Work Item, the same Work Item cannot be opened by another user until you log off or saves the Work Item details. The work item is locked for the second user and **Unlock** appears next to the work item. If you click **Unlock** while another user is working on the work item, then a message appears and you can view the work item in a Read-Only mode. The second user can unlock it after the first user has saved or canceled the work item details.

You can submit the estimate to the vendor by clicking **Submit to Vendor**.

You can view the vendor details by clicking the vendor name link wherever it appears in the system.

After the estimate is submitted to the vendor, the vendor can log on to the Partner Channel Management (PCM) solution to view the estimate.

*Note:* You can edit the estimate details by clicking **Edit**.

### **Expired Estimates**

An estimate is marked expired by the system if the following criteria are fulfilled:

- The estimate end date is less than the current date.
- Estimate status is not Submitted to Vendor.

You can view the expired estimate in a read-only format. To revise these estimates, select it and click **Revise**. Enter the reason for the revision. The estimate status is then changed to Revised. You can revise the expired estimates only.

The estimate creator or coordinator can do following operations:

- Submit such Estimate to the vendor.
- Estimate review (either approves or rejects Estimate).
- Edit Work Item or Estimate details.

Additional details about Estimates revision:

- When an Estimate expires, the approval jobs for such Estimate (if exists) are Canceled. Reviewers of such job cannot review the Estimate.
- When the Estimate is revised, notification is 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 comments for the version.

### **Viewing Estimates by the Vendor**

The vendor resources can access the estimate assigned to them by logging on to the Partner Channel Management (PCM) solution. To log on, on the browser enter the standard SAS Marketing Operations Management url with */pcm* at the end. For example, if your url is <http://1.1.1.1/MOM>, then the url for Partner Channel Management (PCM) is <http://1.1.1.1/MOM/pcm>. The vendor resource is a user and can log on using their login credentials.

Click **Estimates** link in the left pane of the Partner Channel Management (PCM) solution. All the estimates that are submitted to vendor to define new work-items or to modify the existing ones are displayed. The vendor resource can update an estimate by

defining the work-items and re-submit it to the initiator of the 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 complete.

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 serves as the baseline SOW for the entire year.

Importing or Viewing the Actual Item details: The vendor can import the actual item details against an estimate through the Partner Channel Management (PCM) solution. Click **Import Actuals** link in the left pane.

You can select the following file types for a sample template:

- **Agency Hours Template:** In this template you need to enter the plan name, work item number, resource category path, resource category name and the quantity for a particular month.
- **OOP Template -** In this template you need to enter the plan name, work item number, resource category path, resource category name and the total cost for a particular month.

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

Based on a configuration setting, vendors are 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 is imported, you can view the status of the job by clicking **View Import Jobs** link. A list of jobs with their status appears. A notification is sent to the owner or 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 appears with the following tabs:

- **Estimate:** The estimate details, work items and the reviews are displayed. The estimate can be marked as complete by clicking **Mark as Completed**.

*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.

- **Workflow:** The initiator of the estimate can initiate a workflow by selecting a job type.
- **Previous versions:** The versions of the estimates are 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.

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## Commitments or Purchase Order (PO)

### ***Making a Copy of Existing Commitments***

You can copy commitments from the Program, Campaign or Activity (Expenses tab) or from the Budgets.

Select the commitments to be copied and click **Copy**. Select the marketing activity. The radio buttons for activities to which you have no access are disabled. A commitment with any status can be copied to an activity provided you have access to the activity or you are a Creator, Owner, Coordinator or Budget manager.

You cannot copy commitments to another activity in the following cases:

- Activity status is Closed, Pending or Under Review.
- Activity status is Budget Rejected and the setting in the Strategic Planner Administration for **Allow Operation In Budget Rejection** is No. If it is Yes, then you can copy the commitment even if the budget is rejected.
- If the activity level is 1 and the setting in the Strategic Planner Administration for **Allow Budgeting In First Level** is False.
- While copying the commitment the activities for which you have no access appear disabled. The invoices in a commitment are not copied but the amounts are copied to the new commitment and the amounts are calculated unto the plan level. Enter the new commitment number or it can be auto generated based on the configuration settings.
- Setting **Expense Tracking Required** is False.

You can save the newly created commitment with the necessary changes in the system.

### ***Adding Commitments***

To add commitments click **Add** in the Commitments section. The Create Commitments screen appears.

Enter the following details:

- **Commitment:** Enter details such as commitment # (could be auto generated depending on the setting), title, description, committed on, payment due on, the vendor, the currency and the vendor resource. The created on date, requisitioner (creator of the commitment) and the status are displayed.
- **Commitment Items:** Specify the details for each commitment item such as cost category, description, rate, units and quantity. The amount and the total is calculated automatically. You can add more commitment items by clicking **Add**.
- **Payment Schedule:** Add new payment schedules by clicking **Add**. Enter details such as date, amounts, notes and the status for each payment schedule.
- **Attachments:** Add attachments for the commitments by clicking **Add**.

Save the commitment.

*Note:* Based on the configuration certain checks are made. If the activity budget does not have sufficient funds for the commitment, then you cannot save the commitment.

Once the commitment is saved a View Commitment screen appears with all the commitment details in the Information tab. You can add Invoices. If the setting for commitment approval is on, then you can add invoices only after the internal and vendor approval is completed.

You can perform the following operations on this screen:

- **Edit Commitment:** You can edit the commitment.
- **Close Commitment:** You can close the commitment. When a commitment is closed the outstanding amount is released to the plan level. After all the invoices have come in and nothing more is added to the commitment, you can close the commitment.
- **Commitment Approval:** If commitment approvals are set to True in the Strategic Planner Administration, then a commitment review is mandatory.
- **Void Commitment:** At any point of time, before invoices are raised against the Purchase Order, you can void a commitment. The outstanding amounts are released up to the plan level. The necessary calculations are managed in the system for changes in the budgets as a result of the voiding of the Purchase Order. The amounts in the commitment are displayed for tracking purpose even if the commitment is voided. The necessary notifications are sent to the relevant parties involved. Once the commitment is voided no operations can be performed on it.

Approvals tab on the View Commitment screen displays the internal and the vendor reviews. Details such as the job name, job status, review status, start and due date and the % complete are displayed.

### ***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 whether the route should terminate on rejection by specific reviewers. A user having Edit access can edit the job even after it is submitted. For approving the commitment, go to the Approvals module and click **My Reviews** link to view the commitment sent for review. You can approve or reject the commitment.

If you reject the commitment, then you should start the approvals cycle again until the commitment is approved internally. Once the commitment is approved internally the **Commitment Approval** button on the View Commitment screen in the Information tab changes to the **Generate PO** button. You can generate a Purchase Order by clicking the button. You can route the Purchase Order to the vendor's resources for acknowledgment. The review cycle goes on until the vendor approves the commitment.

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## **Creating and Managing Activities**

Under the Activities tab in the View Program screen list of activities is displayed. Each programs or campaigns title has a link. To view the detailed information of an activity click title link. To add a new activity click **Add**, creating an activity is similar to creating a program or campaign. Click **Save** on a Create Activity screen and a **View Activity** screen appears with the activity information.

A view activity screen has a tabbed layout with information for the program or campaign grouped under various tabs similar to program or campaign information screen. Instead of an Activities tab there is Sub-Activity tab, where you can add and update sub-activities.

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## Using the Best Practices Builder

If the setting for Best Practices Builder is set to yes in the Strategic Planner administration, this feature is active. Best practices per activity type or communication channel are configured in the system. You can apply best practices at any level such as Program, Campaign or Activity depending on the activity type selected by the administrator while configuring it.

In the following example it is applied at the Campaign level. An extra tab with the configuration name is available. All the additional information of the Campaign configured by the Administrator appears.

*Note:* The information in the <Best Practices> , Scorecard and workflows tab, is visible only if the administrator populates all the fields in the Best Practices Builder in the Strategic Planner Administration.

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## Budgets

### ***Business Rules for Budgeting***

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

Step 1

**Table 28.4** Plan 1 with Two Cost Centers Having Planned Amounts

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	0	100
Cost Center 2	100	0	100

Step 2

**Table 28.5** Campaign 1 in Plan 1 with Planned Amount in Cost Center 1

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	0	100



**Table 28.6** Campaign 1 in Plan 1 with Planned Amount in Cost Center 1

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	0	50

Step 3

**Table 28.7** Activity 1 in Campaign 1 with Planned Amount in Cost Center 1

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.8** Activity 1 in Campaign 1 with Planned Amount in Cost Center 1

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	0	50

**Table 28.9** Activity 1 in Campaign 1 with Planned Amount in Cost Center 1

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	0	50

Step 4

**Table 28.10** Campaign 2 for Plan 1 with Planned Amount in Cost Center 2

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.11** Campaign 2 for Plan 1 with Planned Amount in Cost Center 2

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	50	0

**Table 28.12** Campaign 2 for Plan 1 with Planned Amount in Cost Center 2

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	0	50

*Note:* Cannot have more planned amounts in Activity 1 or in another activity since no amount is remaining in Campaign 1.

**Table 28.13** Campaign 2 for Plan 1 with Planned Amount in Cost Center 2

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 2	75	0	75

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

#### Step 5

**Table 28.14** Spending Planned for Activity 1 (Allocated to Spend) = \$30

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.15** Spending Planned for Activity 1 (Allocated to Spend) = \$30

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	50	0

*Note:* Cannot have allocated to spend amounts at the Campaign 1 level as all the money is allocated to Activity 1.

**Table 28.16** Spending Planned for Activity 1 (Allocated to Spend) = \$30

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	30	20

**Table 28.17** Spending Planned for Activity 1 (Allocated to Spend) = \$30

Campaign 2	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 2	75	0	75

Step 6

**Table 28.18** Spending Planned for Campaign 2 (Allocated to Spend) = \$75

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.19** Spending Planned for Campaign 2 (Allocated to Spend) = \$75

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	50	0

*Note:* Cannot have allocated to spend amounts at the Campaign 1 level as all the money is allocated to Activity 1.

**Table 28.20** Spending Planned for Campaign 2 (Allocated to Spend) = \$75

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	30	20

**Table 28.21** Spending Planned for Campaign 2 (Allocated to Spend) = \$75

Campaign 2	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 2	75	75	0

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

Step 7

**Table 28.22** Committed Amount (for spending) for Activity 1 = \$20

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.23** Committed Amount (for spending) for Activity 1 = \$20

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	50	0

**Table 28.24** Committed Amount (for spending) for Activity 1 = \$20

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount	Committed Amount	Unspent Amount
Cost Center 1	50	30	20	20	10

Note: Unspent Amount = Allocated to Spend - (Committed Amount + Spent Amount)

**Table 28.25** Committed Amount (for spending) for Activity 1 = \$20

Campaign 2	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 2	75	75	0

Step 8

**Table 28.26** Spent Amount (Invoices Amount) for Activity 1 = \$10.

Plan 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	100	50	50
Cost Center 2	100	75	25

**Table 28.27** Spent Amount (Invoices Amount) for Activity 1 = \$10.

Campaign 1	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 1	50	50	0

**Table 28.28** Spent Amount (Invoices Amount) for Activity 1 = \$10.

Activity 1	Planned Amount	Allocated Amount	Unallocated Amount	Committed Amount	Spent Amount	Unspent Amount
Cost Center 1	50	30	20	20	10	0

Note: Unspent Amount = Allocated to Spend - (Committed Amount + Spent Amount)

**Table 28.29** Spent Amount (Invoices Amount) for Activity 1 = \$10.

Campaign 2	Planned Amount	Allocated Amount	Unallocated Amount
Cost Center 2	75	75	0

## Viewing the Budgets as a Budget Manager

Click **View Budgets** link in the left pane. A View Budgets screen appears. You can search for specific budgets by entering filters and clicking **Search**. All the budgets reviewed by you are displayed in the Budgets section. The pending budgets, for which you are the Budget Manager for are displayed in the Pending Budgets section. Click the Budget title link, to go to the Budget Manager: View Budget screen. The program information, financial information and the user roles are displayed in a tabbed view. You can enter comments for the budget and approve or reject the budget.

**Table 28.30** Impact of Budget Rejection

Tab	Operations Allowed
Information	<ul style="list-style-type: none"> <li>• Editing the Activity information.</li> <li>• Moving an Activity.</li> <li>• Saving a version for an Activity.</li> <li>• Adding or deleting Objectives.</li> <li>• Adding or deleting Products.</li> <li>• Adding or deleting Target Groups.</li> <li>• Adding or deleting Distribution Channels.</li> <li>• Adding or deleting attachments.</li> </ul>

Tab	Operations Allowed
Activities or Sub Activities	<ul style="list-style-type: none"> <li>• Adding or deleting activities at the lower level.</li> <li>• Moving activities.</li> </ul>
Budget	<ul style="list-style-type: none"> <li>• Adding or deleting Cost Centers.</li> <li>• Editing Forecasts.</li> <li>• Editing Allocated to Spend.</li> <li>• Re-initiating Budget.</li> <li>• Releasing money.</li> </ul>
Expenses	<p>If the configuration setting is True, then the following operations are allowed:</p> <ul style="list-style-type: none"> <li>• Adding or deleting of Commitments.</li> <li>• Adding or deleting Invoices.</li> </ul>
Scorecard	<ul style="list-style-type: none"> <li>• Setting Default Metrics</li> <li>• Adding or deleting Measurements.</li> <li>• Recalculating KPIs.</li> </ul>
Reviews	Adding or deleting reviews.
User Roles	<ul style="list-style-type: none"> <li>• Adding or changing the Marketing Owner.</li> <li>• Adding or deleting Coordinators.</li> <li>• Adding or Deleting Budget Managers.</li> <li>• Adding or deleting Readers.</li> </ul>
Workflows	<ul style="list-style-type: none"> <li>• Adding or deleting Briefs.</li> <li>• Adding or deleting Projects.</li> </ul>
Versions	Deleting Versions.

### Viewing the Commitments

Click **View Commitments** link in the left pane. A View Commitments screen appears. You can search for specific Commitments by entering filters and clicking **Search**. All the commitments reviewed by you are displayed in the Commitments section. Click the Commitments title link, to go to the View Commitments screen. You can close or edit the Commitment. You can view the commitment items and the payment schedule. You can add invoices and do a batch reconciliation.

### View Invoices

A view invoices screen appears with the following sections:

**Search:** You can search for Invoices using filters such as vendors, invoice # (number), payment due date (from and to), paid on date (from and to), invoice date, status and the cost center then clicking **Search**.

**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.

## Providing Reviews

To review plans, programs, activities and estimates, click **Reviews** link in the left pane. Click the title links to view the details and provide comments. You can upload files if required.

## Changing the Budget or Forecast for a Plan

### *Overview of the Sandbox*

Click **Bulk Changes** in the left pane to view the existing sandboxes.

Users who have access to all the plans in the sandbox are as follows:

- The Budget Delegate.
- The initiator of the Plan.
- 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 is locked when a user is in the sandbox to avoid conflict. It is unlocked when the Plan is released from the Sandbox either by applying the changes to the Plan, canceling the changes or aborting the changes. If any user locks a sandbox but does not unlock it, the administrator has special access to unlock the sandbox. You can export the Budget Re-allocation and Forecast Re-allocation to PDF or Excel.

### *Budget and Forecast Re-allocation*

Only the Plan creator or the Complete Access Group users can initiate the sandbox. On the View Plan screen in the Budgets tab click **Edit Bottom Up** to reallocate the budgets for the Plan.

Select the Budget Delegate. If you do not select the Budget Delegate, then you are assumed to be the Budget Delegate. The user selected as the budget delegate receives a notification. Once this is done the Plan is in the bulk changes mode and is locked.

There are two tabs on the **View Plan—Bottom Up** screen, they are:

1. **Budget Re-Allocation:** You can perform the bulk changes for budget re-allocation 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.

You 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 and activities below it. In the Sandbox, you can apply the budget reallocation changes in a batch as an online process. After finalizing the changes apply them to the plan and all the programs, campaigns and activities below it. You can change the amounts that are underlined.

**Figure 28.6** Budget Re-Allocation

Marketing Activity	Status	Planned	Allocated to Spend	Committed	Spent	Unspent	Unallocated	Change
Car Loans Program	Budget-Approved	113,920.00	38,033.83	458,489.89	190,800.00	-470,856.06	10,833.93	
Summer Advertising Program	Draft	22,920.00	2.82	0.00	0.00	0.00	12,533.92	

2. **Forecast Re-Allocation:** You can perform the bulk changes for the forecast re-allocation without any constraints that are applicable in the regular mode of operation within a plan.

Within the sandbox, you can view the budgeting information such as the planned and the forecasted amounts for a discipline per quarter, month, year or period in a plan and all the programs, campaigns and activities under it. You can add disciplines. Only authorized users have the ability to add a discipline for a plan, program, campaign and activity in the sandbox for forecast re-allocation.

You can add disciplines if the following criteria are fulfilled:

- The user can add a discipline for a program, campaign, activity only if it is already added at the parent level.
- If the setting to allow adding of disciplines at the plan level in the sandbox is set to true, then at the plan level, you can select a discipline from the list. All the forecasting disciplines configured in the system are shown.
- You can select and add disciplines in the sandbox at the program, campaign or activity level only if it is already added at the parent level.

Authorized users also have the ability to remove a discipline for a plan, program, campaign and activity. You can remove a discipline from a plan, program, campaign or activity if it is not selected at the lower levels. If you try to remove a discipline which is selected at the lower levels from a plan, program and campaign, then an alert message appears.

On the **View Plan—Bottom Up** screen, details such as the plan title, description, business unit, currency, fiscal year, plan status and last updated on are displayed.

You can do the following operations:

- **Save as Draft:** The sandbox is saved as a draft only. The changes are not applied.



- **Apply Changes to Plan:** The changes are applied to the plan and the plan is unlocked.
- **Cancel Changes:** The changes are canceled.
- **Abort Bulk Changes:** The sandbox mode is canceled and you go back to the plan screen.

Click the underlined amounts to change them. Once the changes are made in the amounts a change log is entered next to the plan, program, campaign or activity in the last column. A single notification is 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 activities under it. There is a configuration setting that determines whether the system should send notification to the activity coordinators.

### **Multi-year Activities**

You can continue an Activity beyond the current fiscal year and move its commitments to the following year. To continue an activity, split the Unspent Amount and the Commitment Amount so that it is allocated as Budgeted and Committed amounts in the activity for the next fiscal year. Move the user-defined amounts from the Unspent and Committed Amount of the Current Years Activity to the Activity continuing in the next Fiscal Year. In this case be sure to create the Plan for the next Fiscal Year and allocate the budget to the Plan. You can perform bulk changes for closing activities as well as continuing activities and commitments in the next fiscal year in the Sandbox.

On the Information tab click **Multi—Year Activities** to do the bulk changes. Select the Budget Delegate. If you do not select the Budget Delegate, then you are assumed to be the Budget Delegate. The selected Budget Delegate receives a notification. Once this is done the plan goes into the bulk changes mode and is locked.

A Plan's Sandbox for Multiyear Activities screen appears. Details such as the plan title, description, business unit, currency and fiscal year are displayed. While aligning an activity the next fiscal year's plan name is not displayed until the activity is aligned.

You can go the commitments and add the payment schedule for the next fiscal year. Click the marketing activity name link. Click the Commitments name link to split the commitment. A Commitment Details screen appears where you can add the payment schedules for the next fiscal year. Save the changes. Once the commitment is split, align and close the activity.

**Figure 28.7** Aligning Activities

▲ Program Details						
Program Path: Loans Plan for 2014						
Program #: 1008						
Program Title: Car Loans Program						
Program Type: Advertising						
Program Status: Budget Approved						
Planned In-Market Start Date: 01 May 2014				Planned In-Market End Date: 30 June 2014		
Actual In-Market Start Date:				Actual In-Market End Date:		
Currency: USD						
Financial Summary						
Planned:		110,000.00		Allocated to Spend:		30,000.00
Unallocated:		80,000.00		Committed:		600,000.00
Unspent:		-670,000.00		Spent:		100,000.00
▲ Cost Center Breakup						
Name						Amount
Insurance division						20,000.00
Loans Division						10,000.00
▲ Commitments						
Commitment #	Name	Status	Vendor	Initial Commitment Amount	Commitment Split Current Fiscal Year	Commitment Split Next Fiscal Year
1000	Advertising	Closed	Creative Eye Pvt. Ltd	1,000,000.00	0.00	0.00
1001	Marketing	New	v2	600,000.00	600,000.00	0.00
<input type="button" value="Close"/> <input type="button" value="Align &amp; Close"/> <input type="button" value="Done"/>						

*Note:* If you add any payment schedule for the next fiscal year, then ensure that the activity is aligned.

To apply the changes to the plan click **Apply Changes to Plan**. The changes are applied and the plan is unlocked.

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

## Requesting for Resources

You can request for resources for your activities from the Strategic Planner module. You can select user as Resources and assign them to various Activities.

Click **Resource Request** link in the left pane. A Resource Request screen appears. The top bar contains the filters using which you can request for a resource for a particular plan, program, campaign and activity.

The top bar has the following filters:

- Select the Fiscal Year based on which the Business Unit and Plans are populated in the list box. You can select multiple Business Units or Plans. You can filter based on Activity Type and In-Market Start Date.
- Change the time scale date range by selecting the months, year, and clicking **Go**.
- View the activities in a particular date range using the slider. Based on your filter selections, the Plans, Programs and Activities are displayed in the view below.

Select the filters and click **Go**.

The Activity Path appears in the first column and the Activities are displayed in the second column. You can expand the Activities to view the requested or allocated resources. The bar shown for an activity indicates whether the resources are allocated. Click the gray bar to check the start and the end dates, the number of hours the resource is requested for. You can request for a resource by selecting the resource category and specify the dates and the number of hours, you need the resource for. Save the request.

After the Resource Category Head approves the resource request, your request appears in either green or yellow depending on the allocation.

---

## Embedded Reports

There are some embedded reports in Strategic Planner. You can generate them from the Strategic Planner screen and are available for each level of the plan. On the left pane the links to the following reports are displayed:

- **Marketing Calendar:** Generate the marketing calendar report to view the complete Gantt chart. The calendar for the plan as well all its activities is shown. When this report is generated at any level of activity, it shows the calendar from that level of activity and all the levels below it. This shows the calendar for both the planned and actual dates for the activities as well as for the activities having different activity types. Different colors are used to differentiate these. This marketing calendar report is a yearly report. While generating this report you can select and exclude an activity from the report.
- **Forecast Variance:** This report link is available only if the Forecasting Required option is set to True. The users having Read or 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. When the actuals exceed the forecast amount, the amount appears in red. When the actuals are less than or equal to the forecast amount, it appears in green.
- **Activity Actuals—Monthly or Quarterly:** This report is generated at all levels within the plan. This report displays the roll-up amounts at each level for allocated to spend, committed and spends per quarter or month, total spend, available and unspent. The invoice paid date is considered for the quarter or month calculation. You can export this report to Excel and PDF.
- **Activity Budget Report:** This report displays the planned and unallocated amounts at that level and the roll-up 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 or 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 to 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 example, if ALL is selected for the business unit filter, the business units to which you belong to is considered.

Strategic Planner reports display a list of configured reports. To launch the reports click **Reports** link in the left pane of the Dashboard screen. By default the Strategic Planner reports are displayed .

Any reports which are scheduled by you are displayed in the top section with the following details:

- **Name and Description:** Enter name and description of the report.
- **Run cycle:** Specify how many times the report should be generated.
- **Next Run Time:** Select when the report should be generated next, if the report is generated multiple times.
- **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.

You can schedule the Overspent Report, Activity Budgets and Spends Reports in Strategic Planner.

You can generate the following reports for 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 you can export the reports in PDF or Excel.

## Chapter 29

# Managing Offers

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## Overview

Offer Management is a solution that allows marketing organizations to create and manage marketing offers. These offers are published via the offer calendars and included 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 calendar.

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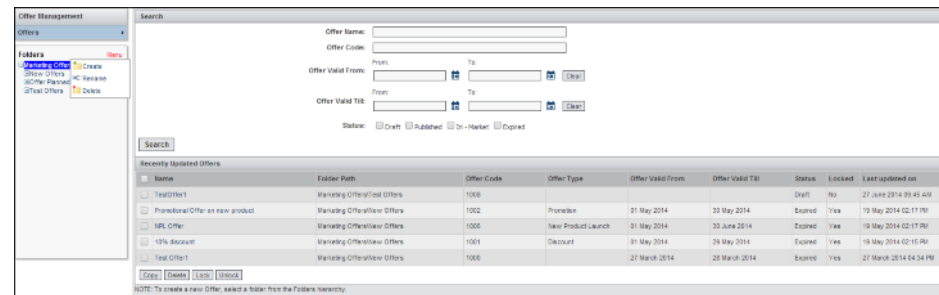
## User Roles

- **Creator:** User who creates the offer.
- **Owner:** The creator can select a user as an owner. By default, the creator is the owner.
- **Author -:** List of users or groups selected who have an Edit access on the offer.
- **Reader:** List of users or groups who get a Read-Only access on the offer.
- **Offer Managers (group):** This role is used to send e-mails when the offers are changed. Only members of this group have access to lock or unlock offers. Members of this group have an Edit access on all the offers.

## Creating Offers

After logging on click **Offer Management** link in the left pane on the Dashboard screen to launch the solution. The following screen appears by default.

**Figure 29.1** Offer Management



A list of recently updated offers is displayed with details such as offer name, folder path, offer code, offer type, offer valid from and until dates, status, locked and last updated on. You can search for offers using filters such as offer name, offer code, offer valid from and until dates and the status of the offer (draft, published, in-market and expired). You can edit the offers by clicking the offer name link.

To store offers first create folders by clicking **Menu** link on the left pane, the following options are available :

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

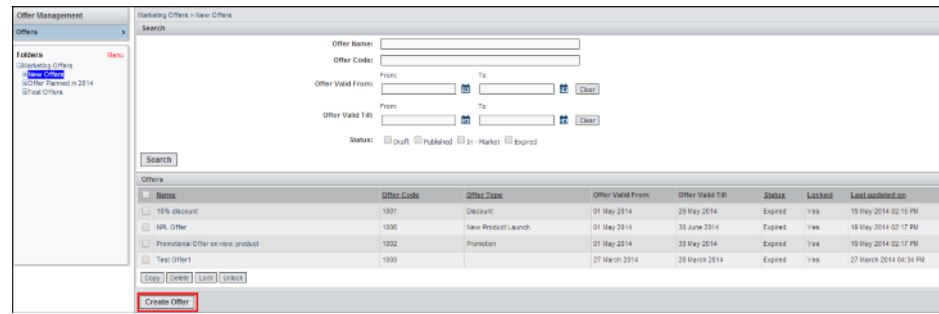
You can perform the following operations on the Offers screen:

- **Copy:** You can make a copy of a selected offer. You can make a copy of an offer only if you have edit rights. When you select multiple offers and click **Copy**, the system creates the offers with **Copy** of string appended to the name. A popup appears where the user can change the names of the offers. During the copy operation, for each offer, an audit record is maintained. This tracks the user who makes a copy and the date and time at which the offer was copied. All the facets, roles, attachments are copied. Notifications are sent to the authors and readers when the copy is created.
- **Delete:** You can delete a selected offer.
- **Lock:** You can lock a selected offer while editing it. An offer can be locked by the members of the offer managers group only. When an offer is locked, users can see the offer details in a read-only screen.
- **Unlock:** You can unlock a locked offer.

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

Select the folder in which you want to store the offer and click **Create Offer**.

Figure 29.2 Offer List



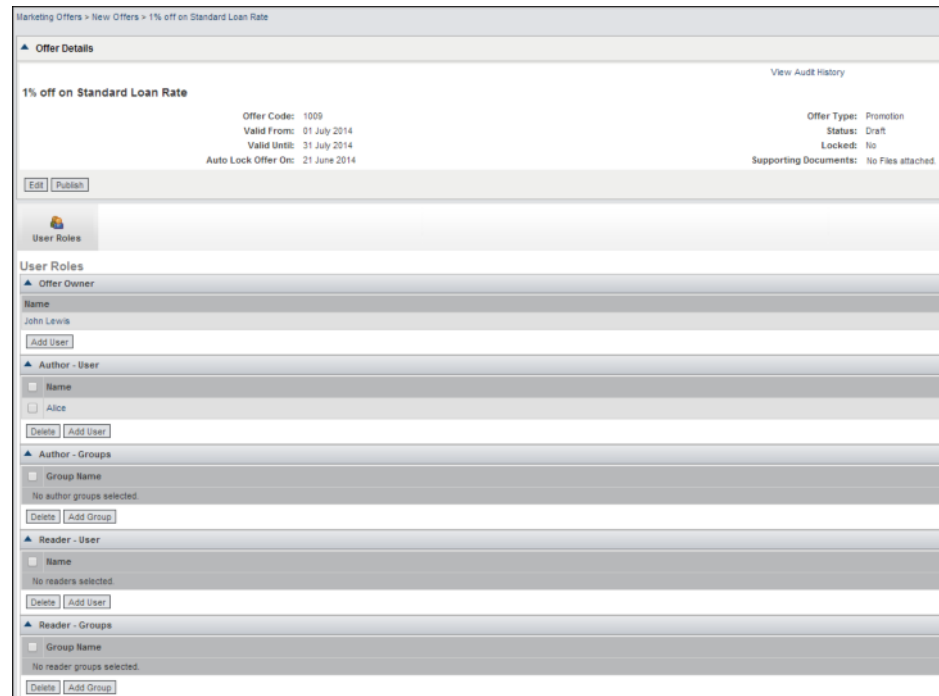
An Offer Details screen appears. Enter details such as offer name, description and offer code (could be auto generated depending on the setting). Select the offer type, valid from and until dates. Upload any supporting documents.

Click **Save and Continue**. An Offers Details screen appears where you can edit and publish the offer details entered. In the user roles section, you can assign roles such as offer owner, authors and readers to different users.

The owners and authors have a Write access and they can edit the offer details whereas the reader has a Read-Only access on the offer.

After all the information is entered, you can publish the offer by clicking **Publish**.

Figure 29.3 User Roles



Offers can have the following status values:

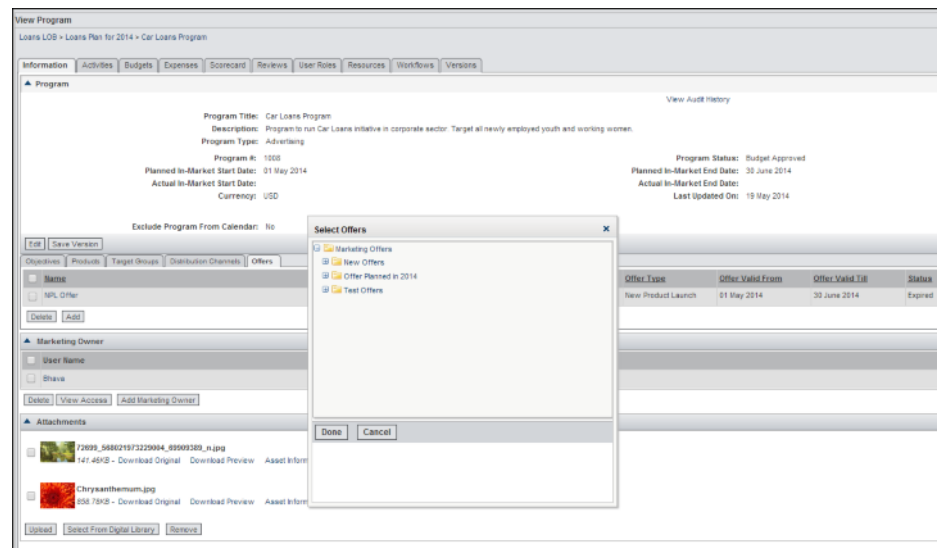
- Draft: The offer is in a draft mode if the creator has just saved the offer and not published it.
- Published: Only a published offer can be selected in Strategic Planner. You cannot select an offer with any other status.

- In Market: There is a back-end process which runs every day to 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 is changed to In-Market. In— Market offers are in a read-only format.
- Expired: If the end date of an offer is less that today's date, then the status is changed to Expired.

## Offers in Strategic Planner

Offers created in Offer Management can be selected in Strategic Planner from the second level that is, the program level onwards. In the Information tab of an activity, an Offers tab is available. You can add offers by clicking **Add**.

**Figure 29.4** Offers in Strategic Planner

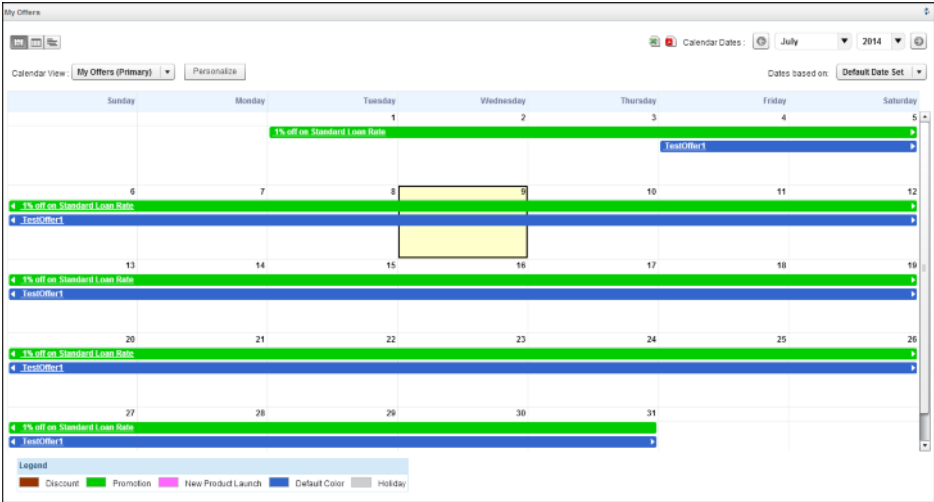


## Offer Calendar

The offers associated with one or more marketing activities are displayed on the Offers Calendars. The Offer Managers group can access all the offers from the Offers Calendar.



Figure 29.5 Offer Calendar





## Chapter 30

# Using Marketing Workbench

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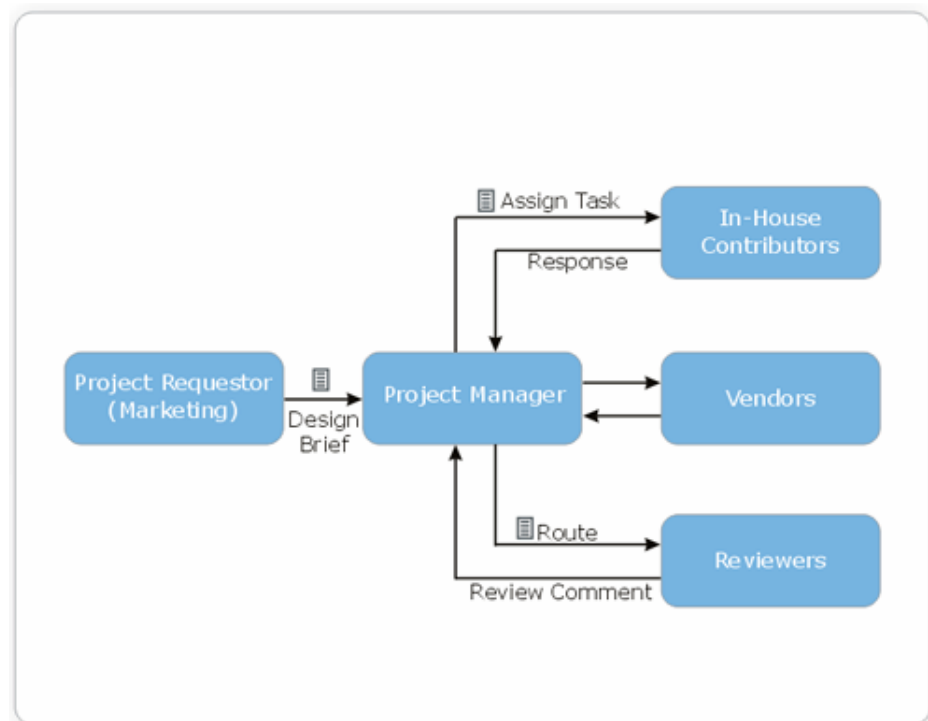
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## Overview

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.

**Figure 30.1** Marketing Workbench Overview



## User Roles in Marketing Workbench

The user roles in Marketing Workbench are as follows:

- **Project Managers:** In charge of project execution.
- **Acting Project Manager:** Has the same right as the Project Manager. Is assigned by the Project Manager. Works if there is no the Project Manager.
- **Deliverable Manager:** Is responsible for the deliverable and can add, delete, modify, submit and cancel tasks.
- **Readers:** Stakeholders who have access to view the briefs, projects and tasks.

- **Reviewers:** Stakeholders who review the briefs, requests and tasks and give their comments.
- **Contributors:** Resources or users who are assigned tasks for execution.
- **Task Initiator:** The user who initiates the task.

---

## Marketing Workbench Process

In general the process is as follows:

1. The project requestor creates a brief and sends it to the project manager.
2. The project manager creates a project from the brief and then assigns tasks to the various contributors and vendors.
3. The contributors respond to these tasks with comments, documents, files, and so on. These are sent back to the task initiator. The project manager can route the documents or files sent by the contributors among the reviewers.
4. The reviewers give their comments and approval in response.

---

## Operation Modes

**Request Mode:** In this mode the user (product or marketing managers) can initiate new briefs, view inactive briefs and delete the existing briefs.

**Manage Mode:** In this mode, the user (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 or submission of tasks for a deliverable.

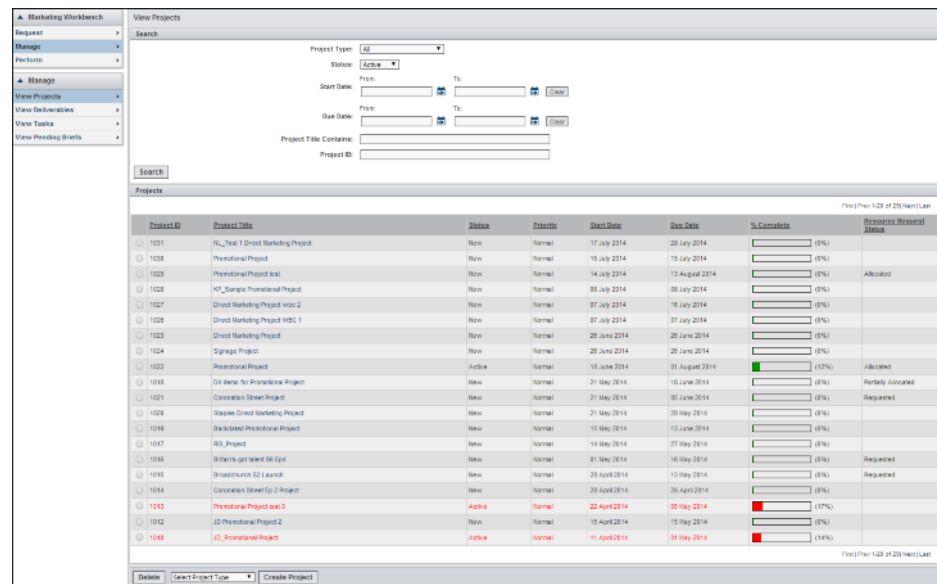
**Perform Mode:** The users (resources, contributors, reviewers) can view the active task list, inactive task list and briefs to be reviewed in this mode.

---

## Getting Started

After logging on click **Marketing Workbench** link in the left pane on the Dashboard screen. The Marketing Workbench screen appears. Links such as Request, Manage and Perform are available in the left pane. By default, the application launches in the Manage mode and there are four additional links such as View Projects, View Deliverables, View Tasks and View Pending Briefs.

Figure 30.2 Marketing Workbench



## Request Mode

### Overview of the Request Mode

This mode is used to search existing briefs, initiate new briefs and delete an existing brief. Click **Request** link in the left pane. A View Briefs screen appears. You can search for briefs using filters such as brief type, status, start and due date of the brief and brief title contains (a keyword). The searched briefs are displayed in the section below. To view or edit details of a particular brief click the title link of the brief. If a brief is initiated from a Strategic Planner activity, then while viewing the brief, a link is provided to view the marketing activity.

### Creating Briefs

On the View Briefs screen, select a brief type from the pre-defined list and click **Create Brief** to create a new brief.

A Create Brief screen appears with the following tabs:

- **Information tab:** Has the following sections:
  - **Brief:** The brief ID appears (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. You can view the details of the brief initiator by clicking the user name link. If a facet is associated with the brief, then the fields in the facet are displayed in a new section.
  - **Deliverables for Brief:** Select the deliverable type from the drop down list and click **Add Deliverable**. You should save the brief while adding the deliverable. You can add component as well.

- **Attachments:** Upload attachments by clicking **Upload**. You can select attachments from the Digital Library by clicking **Select From Digital Library**.
- **Template Documents:** The brief template appears. You can download the template and fill it and upload it in the attachment section. The template documents are available only if they are uploaded by the administrator while configuring brief types.

You can save the brief as a draft by clicking **Save**. **Save and Close** saves the brief in draft and take you back to the View Briefs screen. You can submit the brief to the project manager by clicking **Submit**.

**Figure 30.3** Create Briefs

The screenshot shows the 'Create Brief' interface. It features three tabs: 'Information', 'Reviews', and 'User Roles'. The 'Information' tab is selected. The form contains the following fields and sections:

- Brief ID:** 1014
- \* Brief Title:** Promotional Brief
- Description:** A large text area.
- \* Due Date:** 20 August 2014
- \* Project Type:** New Creative
- \* Project Manager:** Managers
- Brief Initiator:** System Administrator
- Deliverables for Brief:** A table with columns 'Deliverable Title' and 'Description'. One row is visible with 'Artwork' in the title column.
- Attachments:** A section with the text 'No Files attached.' and buttons for 'Upload', 'Select From Digital Library', and 'Remove'.
- Template Documents:** A section with a table showing 'Penguins.jpg' under the 'File Name' column.
- Buttons:** 'Save', 'Save And Close', 'Submit', and 'Cancel' are located at the bottom of the form.

- **Reviews tab:** Initiate review for the brief by clicking **Initiate Review**. A Review Details screen appears. Enter the review title, review instructions and the end date for review. Add the reviewers. If a review is initiated for a brief, then the brief initiator cannot modify it.
- **User Roles:** Select the readers by clicking **Add Users** or **Add Groups**.

## Copying Briefs

Select a brief and click **Copy Brief**. The copied brief is opened in an editable mode. The start date is the current date. Select the project manager as this user is not copied. In this mode you can print the brief.

## Submitting a Brief

When you click **Submit**, 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 e-mail notification to the selected project manager indicating that

a new brief is assigned. E-mail notifications are also sent to the readers for the brief. The project manager can view the pending briefs by clicking **View Pending Briefs** link in the Manage mode.

---

## Managing Projects

### Overview of Projects

This is the default mode. This mode is used to create and modify projects and view the pending briefs. It is also used to view the deliverables and tasks.

Click **Manage** link in the left pane. A View Projects screen appears. You can search for a particular project using the filters and click **Search**. The searched projects are displayed in the Projects section. Click the project title link to view the details of the project. If a project is initiated from a Strategic Planner activity, then while viewing the project, a link is provided to view the marketing activity. The activity path appears in the list based on the configuration setting done in Workbench Administration. The Resource Request Roll up status column is also available based on the configuration.

### Creating New Projects

You can create new projects in the following ways:

1. On the View Projects screen select a project type from the pre-defined list and click **Create Project**. A Create Project screen appears.

Enter the following details:

- **Project ID:** The project ID can be autogenerated or you can enter it manually, depending on the configuration.
- **Project Title:** Enter the title.
- **Description:** Enter the description.
- **Project Manager:** You are the project manager for the project.
- **Acting Project Manager:** You can select the acting project manager by clicking **Select Acting Project Manager** link. A user selection screen appears. Select the acting project manager from an existing list of users.
- **Start Date:** Select the start date of the project by clicking the calendar. By default, the date shown is today's date.
- **Status:** The status appears as new in a read-only format here.
- **Priority:** You can select the priority for the project as high, normal or low. The default is normal.
- **Attachments:** You can upload attachments for the project. The attachments can be any file from your desktop or any assets from the Digital Library.

If a facet is associated with the brief type, then the fields in the facet are seen here. Save the project

2. Click **View Pending Briefs** link in the left pane. A View Pending Briefs screen appears with a list of briefs assigned to you. Each row in the list displays the brief details. To view the brief click the title link. A View Brief screen appears where the



brief details are displayed. The user roles, deliverables for the brief, reviews and the attachments are also displayed.

You can perform the following operations on this screen:

- **Create Project:** You can create a new project. A Create Project screen appears. Enter the project details and save the project.
- **Assign to Project:** A list of projects of the same project type selected in the brief are displayed. Only the projects for which you are a project manager or acting project manager are displayed. Select a project to which this brief can be assigned and click **Done**.
- **Reject:** You can reject the brief and enter the reason for the rejection.
- **Print Brief:** You can print the brief.


Notifications are sent to the Brief initiator on any action that is performed.

### Viewing the Project Information


When you create and save a project a View project screen appears with the project information in a tabbed layout.

The screen has the following tabs:

- **Information:** The project details are displayed. You can edit the project details by clicking **Edit Project**. The briefs related to this project are displayed. The attachments if any are displayed here. If the attachments are references from the Digital Library, then the **Download Original**, **Download** and **Asset Information** links are available for the asset. You can add new attachments. By clicking **Done** you are taken back to the project list screen
- **Deliverables:** All the deliverables related to the project are displayed with details such as title, status, contributor, deliverable manager or initiator, start and due date, % complete, completed on and instructions. The grid displays the deliverable, tasks, steps and the contributor when assigned. For the steps, resource request status appears in the grid.

By clicking  icon next to the deliverable title, the following options are displayed:

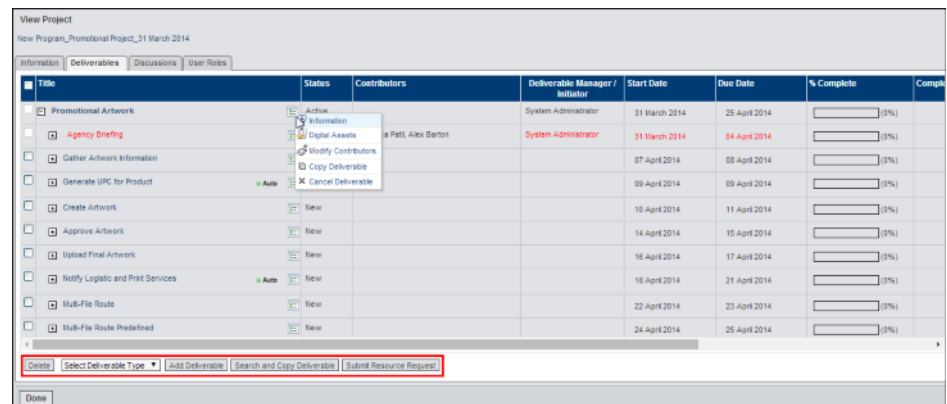
- **Information:** You are redirected to the information tab of the deliverable where the deliverable details are displayed.
- **Digital Assets:** You are redirected to the digital asset tab of the deliverable where you can view or catalog the digital assets for the deliverable.
- **Modify Contributors:** You are redirected to the assign contributor screen where you can add or delete the groups and contributors or resource categories for the tasks. You can add tasks, approvers or contributors to tasks, duration, hours required to perform the task. Select resources, groups or users, provide instructions to the resource manager, instructions to contributors. All this is done in one go on this screen.
- **Copy Deliverable:** You can create a copy of the deliverable and are redirected to the tasks tab of the deliverable.
- **Cancel Deliverable** or **Delete Deliverable:** You can cancel the deliverable with active status. You can delete the deliverable with new or draft status.

For the tasks, click  icon to modify contributors or deleting the task. You can add new steps for discussion and approval tasks.

On the View Project screen in the Deliverable tab the following options are available:

- **Delete:** You can select and delete multiple deliverables.
- **Add Deliverable:** Select the deliverable type and add deliverables.
- **Search and Copy Deliverable:** You can search and copy the deliverables for which you have access. If you create a copy of a deliverable, then you are appointed as the Deliverable Manager by default. The information associated with the deliverable also is 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, and so on. Facet files and binders associated with the step and the responses for the step are not copied.
- **Submit Resource Request:** For each deliverable, you can add the contributors or resources using the **Modify Contributors** link from the grid menu. After selecting the resources, submit the resource request. On submission of the request the resource category head needs to allocate the resources for the task to start. A notification is sent to the Resource Category Head for all the resource requests for which the allocations are pending.

**Figure 30.4** View Project: Deliverable Tab



Title	Status	Contributors	Deliverable Manager / Initiator	Start Date	Due Date	% Complete	Complete
Promotional Artwork	Active		System Administrator	31 March 2014	25 April 2014	0%	
Agency Briefing		a Patel, Alex Barton	System Administrator	31 March 2014	04 April 2014	0%	
Gather Artwork Information				07 April 2014	08 April 2014	0%	
Generate UPC for Product	Auto			09 April 2014	09 April 2014	0%	
Create Artwork	New			10 April 2014	11 April 2014	0%	
Approve Artwork	New			14 April 2014	15 April 2014	0%	
Upload Final Artwork	New			16 April 2014	17 April 2014	0%	
Notify Logistic and Print Services	Auto			18 April 2014	21 April 2014	0%	
Multi-File Route	New			22 April 2014	23 April 2014	0%	
Multi-File Route Predefined	New			24 April 2014	25 April 2014	0%	

- **Components** Depending on the configuration this tab is visible. 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 is visible. This list allows the Project Manager or the Acting project manager to edit all the components which are not locked but they cannot add a new component. This list is shown only if any of the deliverable type have components associated. If you are editing a component at the deliverable level, it is locked until the operation is completed. You cannot edit a component if the deliverable is completed, onhold or canceled. You can edit or export selected components to an excel sheet.
- **Discussions:** The project manager can have a collaborative forum, where the stakeholders of the project can discuss the related topics by using discussion forums. You can initiate a topic within a project and select the invitees (users and groups). These invitees receive a notification. All the discussions for a project are shown in the Discussions tab.

Click **New Topic** to initiate a new topic. A Topic Details screen appears. Enter the details such as title, description, start date and valid until (date). You can select

whether the initiator needs to be reminded about the topic closure and before how many days. You can specify details such as whether to close the topic on the due date or to notify the invitees on closure and reopen the topic or to post details. You can upload attachments for the topic.

You can view the photograph of the person who posts the responses along with the post. As a participant in the discussion, a notification of the posts made by other responders is sent and the participant has a choice to unsubscribe from the notification list.

- **User Roles:** The user roles such as the project manager and the acting project manager for the project are displayed. You can change them by clicking **Select Project Manager** or **Select Acting Project Manager** respectively. The administrator can create one or many restricted groups per project type and add users to the group. The selection of project manager or acting project manager is restricted to this group. While configuring a brief type, the administrator 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. The administrator can set the default readers for the brief, project or task type. You can add additional readers by clicking **Add Users**. You can add the complete access users and groups. 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 are sent to all the users or groups in the complete access group on the following events:

- An instance of a project for which you are a part of the complete access group is created.
- For an instance of a project, you are removed from the complete access group.
- When you are added to the complete access user or group for an instance of the project

Click **Done** to go back on the Project List screen.

---

## Managing Deliverables

### Overview of Deliverables

Traverse to **Manage** ⇒ **View Deliverables**. All the deliverables for which you are the deliverable manager or all the deliverables of the projects for which you have a Write access (Project Manager, Acting Project Manager, complete access user or member of the complete access group selected for the project) are displayed.

You can view the following information about this screen:

- The status of the deliverables and also the active tasks within the deliverable.
- The delayed deliverables or tasks are highlighted.

The deliverable tab on the project information screen displays a list of deliverables for the project and enables you to add new deliverables by clicking **Add Deliverable**.

The creation of a Deliverable happens in three steps:

1. **Selection of the deliverable type:** Select the deliverable type for the project from a drop down list defined by the administrator.
2. **Selection of contributors for the deliverable:** This screen appears based on the configuration done by the administrator. Once the deliverable type is selected click **Done**. An Assign Contributor screen appears with the user roles, task and step hierarchy. You can select contributors who participate in the creation of the deliverable. The user can select group or resource category and contributor for steps to participate in the execution of the deliverable. Click **Done**.
3. **Details of the deliverable:** You can enter details such as deliverable title, description and start date. Specify the due date instead of the start date by clicking **Edit Due Date** and the system sets the start date for the deliverable accordingly. Save the new deliverable. A View Deliverable screen appears.

### **Viewing Deliverable Information**

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

#### **Details on the Information Tab**

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

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 available for the asset. You can add new attachments from your desktop or from the Digital Library. You are taken back to the project list screen after clicking **Done**.


#### **Details on the Components Tab**

Depending on the configuration this tab is visible. Components are parts of a deliverable that are managed through a single workflow and are a package within which there are multiple deliverables. Depending on the tasks assigned to the contributors, you can add, modify or delete the components from the workflows. A contributor can edit, export or batch download the components. 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 the Digital Library (through the Digital Assets tab). Depending on the tasks assigned the following buttons are either visible or hidden to the contributor: Edit, Export 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 status reports and to visually identify the component (row) to which the approved file belongs and reporting on the status of each component in the list.

## Details on the Tasks Tab

List of tasks related to the deliverable are displayed here. Details such as title, status, contributor, initiator, start and due date, % complete, completed on, instructions and resource request status are seen. All these fields are visible by scrolling horizontally.

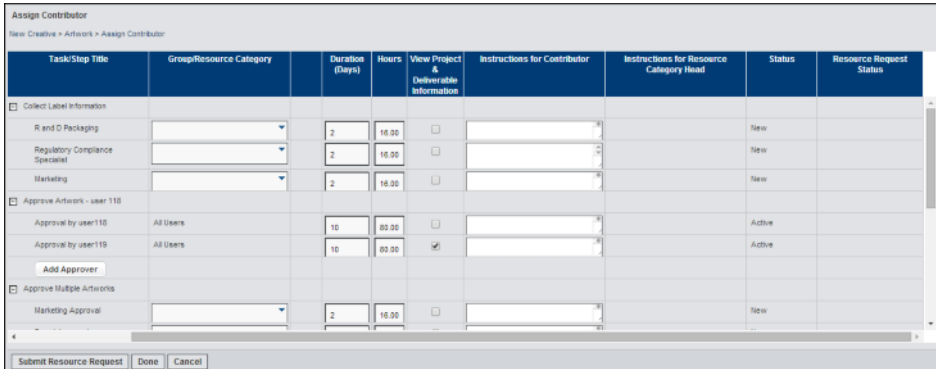
The following can be seen in the list view when  icon, which is next to each task is clicked :

- In case of route or discussion task, the task can be deleted or a contributor can be added.
- You can delete assignment, gather info or web services task. You can cancel active tasks. You can delete new tasks.
- You can complete a tracking task.

You can perform the following actions on this screen:

- **Add Task:** Create new tasks by selecting the task type and clicking **Add Task**.
- **Modify Contributors:** You can select contributors who will participate in the execution of the task.

**Figure 30.5** Modify Contributors



Task/Step Title	Group/Resource Category	Duration (Days)	Hours	View Project & Deliverable Information	Instructions for Contributor	Instructions for Resource Category Head	Status	Resource Request Status
<input type="checkbox"/> Collect Label Information								
R and D Packaging		2	18.00	<input type="checkbox"/>			New	
Regulatory Compliance Specialist		2	18.00	<input type="checkbox"/>			New	
Marketing		2	18.00	<input type="checkbox"/>			New	
<input type="checkbox"/> Approve Artwork - user 110								
Approval by user110	All Users	10	80.00	<input type="checkbox"/>			Active	
Approval by user110	All Users	10	80.00	<input checked="" type="checkbox"/>			Active	
<input type="button" value="Add Approver"/>								
<input type="checkbox"/> Approve Multiple Artworks								
Marketing Approval		2	18.00	<input type="checkbox"/>			New	



- **Modify Timeline:** Clicking on this button a Modify Timeline screen appears. You can view the list of tasks for the deliverable with the start and due dates for the task. You can modify the number of days required to complete the task by providing a numeric value in the duration edit box next to each task. Sometimes there is a requirement that a deliverable has to end by a fixed date so that you can schedule the next tasks accordingly. You know the fixed due date of the deliverable but want to know when to start the deliverable so that it is completed by the decided due date. To edit the due date click **Edit Due Date**. The system creates the deliverable with the given due date and sets the start date for the deliverable accordingly. After the deliverable is created, you can still modify the due date of the deliverable by using the modify timeline functionality and adjust the timeline. Validations such as the start date of the deliverable should not be less than the project start date, and so on, are done.
- **Submit Resource Request:** For each task, you can select the contributors or resources categories using the **Modify Contributors** link. After selecting the resources categories, submit the resource request. On submission of the request the resource category head needs to allocate the resources for the task to start.

You can edit the task details by clicking on the task title. If any of the tasks are auto initiated, then the Auto sign appears next to the task.

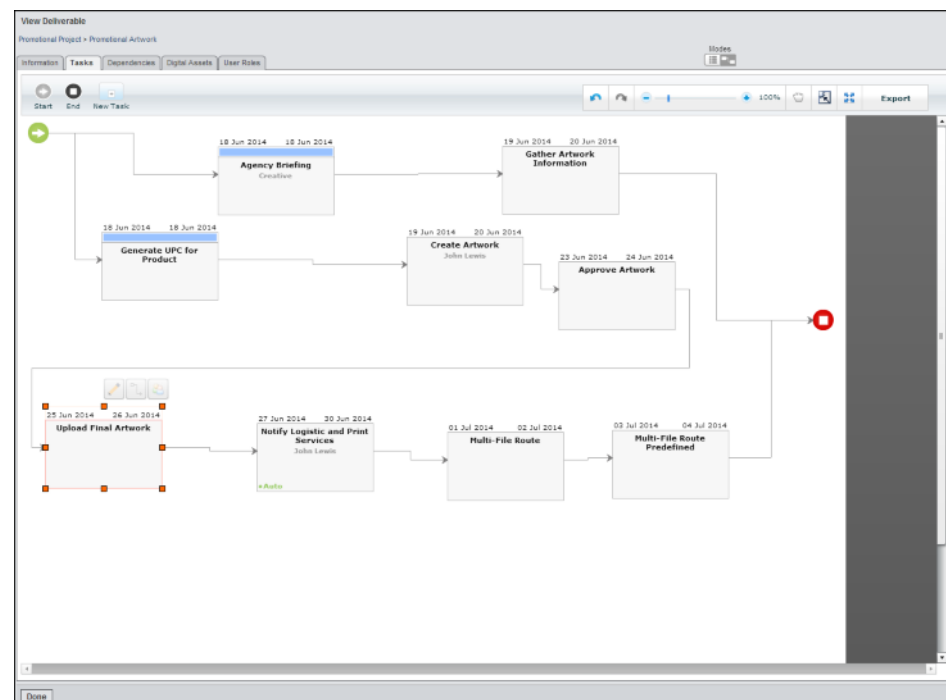
*Note:* In case of auto-initiated tasks, if the prerequisites are not setup, you cannot start the task. In such a case, the Deliverable Manager is notified and you can submit the task manually after setting up the prerequisites.

The system can auto initiate a task without any dependency on an earlier task. The task starts on a preset start date. Notifications and reminders are sent to the project manager, deliverable manager to inform them about the start of these tasks.

You can view the tasks in two modes. The default view is set by the administrator.

1. : A list view icon. The tasks are displayed in a list view. In this view, you can view the tasks and you can perform all the actions mentioned above.
2. : A Visual Workflow view.
  - You can view the tasks in a flow chart with the boxes representing the tasks with the start and the end dates.
  - You can new tasks for a deliverable by just dragging a new box onto the canvas and naming it appropriately. Connect it at the right place, select the contributors and submit it.
  - Enter the task titles for the newly added tasks.
  - You can change the dependencies between the tasks.
  - You can see the contributors for the tasks in the Visual Editor. On a mouse over the system displays the contributor name along with the step title assigned to the contributor.
  - You can view the current status of a task from the status bar above each task box. Blue indicates completed tasks, red indicates delays, green indicates in progress tasks and gray indicates canceled tasks.
  - You can export the workflow as an image or a PDF for reporting purposes.

**Figure 30.6** Visual Workflow View



### **Information about the Dependencies Tab**

You can specify the dependencies of the current deliverable on other deliverables. Select the deliverables within the project by clicking **Select Deliverables**. You can remove the dependency by selecting the dependent deliverable and clicking **Delete**.

### **Information about the Digital Assets Tab**

You can catalog multiple digital assets for a deliverable by clicking **Catalog Assets**.

A Catalog Assets for Deliverable screen appears.

Select from where you want to catalog the asset.

- From external media
- From a task: Shows the list of completed assignment tasks in which the contributors have cataloged assets.
- From the components - If the component status is in final lock

Select the section where you want to catalog in Digital Library by clicking **Select Target Section** link. A Select Target Sections screen appears. Navigate the section hierarchy and select a section. If the target section is predefined, it appears. Confirm by clicking **Done**.

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

*Note:*

- You can catalog the assets uploaded in response to an assignment task in the Digital Library by clicking **Catalog for Deliverable**. You can move the data configured for the asset from the Workflow to Digital Library.
- If a contributor of a task uploads an asset in response to the task, the Digital Asset is automatically cataloged into a predefined section path for the deliverable if configured in Process Designer. Any data that is configured to be transferred from the Workflow to Digital Library is also moved by the system. The configuration for the data to be moved is done through a Data Transfer configuration utility.

### **Information about the User Roles Tab**

In Marketing Workbench, there is 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), delegates a certain deliverable to another user who is the deliverable manager. This user is responsible for the deliverable and can add, delete, modify, submit, and cancel the tasks.

The user role tab displays the deliverable manager. The project manager, acting project manager or the deliverable manager can change the deliverable manager as well as deny access to the deliverable for specific users.

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## Marking the Project or Deliverable as Complete

Once all the tasks for a deliverable are completed, you can mark the deliverable as completed by going to the information tab on 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 information tab edit the project and change the status of the project to completed and click Save, to mark the project as complete. You can put the project on hold and resume later. When the status of the project is changed, the concerned users receive notifications.

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## Reopening Project or Deliverable

You can close or cancel project or deliverable can be reopened. The Project Manager, Acting Project Manager or any member of the Complete Access group can re-open a project. The Deliverable Manager can re open a closed or canceled deliverable, which is within an active project.

Impact of reopening a deliverable or project is as follows:

- To reopen a deliverable, the project should be reopened.
- Any dependency between the deliverables of a project is removed at the time of reopening because a dependent deliverable's timeline is affected by the re-opening of the deliverable. If the status of the successor deliverable is new or draft, then the dependencies are not removed from the predecessor deliverable that is reopened.
- The deliverable end date changes based on the newly added tasks to the reopened deliverable.
- The project end date changes based on the newly added tasks to the reopened deliverable.

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## Managing Tasks for a Deliverable Using the List View

### Tasks Overview

There can be multiple tasks required for a deliverable. A list of tasks for the deliverable are displayed in tasks tab on the View Deliverable screen. Click the task name link to edit the task. On the Edit Task screen, you can either submit the task if it is New or in a Draft state or cancel if the task is in progress. On the View Deliverable screen, add a new task for the deliverable by selecting the task type and clicking **Add Task**.

An Edit Task screen appears with the following tabs:

- **Information:** Enter details such as the task ID (if configured), task title, instructions and the start date for the task. The due date, status and % complete are displayed. Select the check box **Notify if task is delayed**, if you want to be notified on task delay. The associated facets if any are displayed and you enter additional information



for the task. Depending on the type of task, the steps if any are displayed and you can select the resource type and the contributor (for assignment, gather information and route task). Enter the duration and the instructions for each step. For a route task upload the file to be approved, select the approvers and enter the duration. Add attachments. The task duration depends on the type of task.

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

You can download the template documents if available.

- **Dependencies:** When you navigate to this tab, the task is saved. 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. You can add more dependencies by clicking **Select Task**.
- **User Roles:** Add readers by clicking **Add Groups** or **Add Users**. Select the readers from an existing list of users. Click **Done**. You can select the users or groups who should receive a notification on task completion.

Save the task, or submit the task for execution by clicking **Submit**. After selecting a resource category for a task click **Submit Resource Request** to submit the resource request. The resource category head approves and allocates the resource for executing this task. When you submit the task, an e-mail notification is sent to all the contributors or approvers of the task depending on how the task is routed. If the task is routed sequentially, then the first contributor or approver of the task receives an e-mail notification. If it is routed simultaneously, then all the contributors or approvers receive an e-mail notification at the same time.

After a task is submitted, you can change the due date of an active task if required, which impacts the following:

- If you are the task initiator, you can change the active steps using the Modify Timeline screen.
- The Timeline is recalculated if there is change in the duration for task or step.
- Contributors are notified if the duration for the steps assigned to them is changed.
- Validations are done before updating the changed duration for the task or step.

The details screen will vary depending on the task type.

You cannot submit tasks if the following criteria are not fulfilled:

- If the resource category is selected for a step, but the resource is not allocated
- If the step dates and the allocation dates are not same.
- If a resource is allocated and the task is active, then the task initiator cannot modify the selected resource category. If the resource needs to be changed, then it can be done by the Resource Category Head from Resource Management.
- If a resource category is selected, then the resource cannot forward that task to another resource.

The tasks are of the types explained in the sections below.

## **Assignment Task**

You can assign a task to a contributor or a resource to perform a particular function for which response is given. For example, Create Artwork Task is assigned to a designer

who then responds with the artwork file. An assignment task is sent to the contributors or resources sequentially. After the first contributor or resource responds a notification is sent to the second contributor or resource. The 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 or change the contributor of the next step. When a resource category is selected, submit the resource request. The resource request is sent to the resource category head who in turn allocates the resource for the task. The initiator can choose to get a notification if the task is delayed and receive a notification before the due date. An 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, e-mail ID and response is forwarded for reference. The task is completed after all the contributors have submitted their responses.

The Edit Taskscreen has the following layout:

- **Information:** The task information appears. Select groups or the resource categories and provide necessary instructions to complete the task
- **Dependencies:** The tasks on which the current task is dependent on are displayed. You can select more tasks or delete the existing ones.
- **User Roles:** The default readers which are configured by the administrator in Process Designer are displayed. You can add new readers. You can select the users or groups who should receive a notification on task completion.

### **Gather Information**

This is similar to an assignment task and is used to gather information from multiple sources. This is a simultaneous task in other words multiple contributors can submit the information at the same time. Each contributor can respond to a specific functional area. For example, to create an artwork, the project manager needs branding information from the brand manager, product information from the product manager, legal information from the legal department, and so on. The 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 canceled. At least one contributor should be selected before submitting the task. The initiator can choose to get a notification if the task is delayed and receive a notification before the due date. The task initiator can decide whether the contributors can view the project and deliverable information by checking the check box **View Project and Deliverable Information** for each contributor. An 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, e-mail ID and response is forwarded for reference. The task is completed after all the contributors have submitted their responses.

### **Discussion**

This type of task is used to initiate discussions between multiple contributors. Each contributor or resource can enter multiple responses. A discussion task is a simultaneous task, so at a given time multiple contributors or resources can contribute. After selecting a resource category, submit the resource request. The resource request is sent to the resource category head who in turn allocates the resource for the task. Depending on the configuration, the predefined steps are displayed for an instance of the discussion task. You can delete these steps or add new steps. You can edit the name of the step, if required. You can select the contributors from a Route created by the administrator or

saved by you. You can also create a new route. This task should be marked complete by the project manager, acting project manager or deliverable manager. In a discussion type of task there is a notification sent out to all the contributors or resources when the task initiator submits the task.

Depending on the task initiator the following notifications are sent out:

- **Notify me if task is delayed:** If the task is delayed and the response is not posted, then the task initiator is notified as the task is not marked completed by the initiator.
- **Notify task initiator when response is posted:** Whenever a response is posted the task initiator receives a notification.
- **Notify contributors when response is posted:** Whenever a response is posted all the contributors receive a notification.

The initiator can choose to get a notification if the task is delayed and receive 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 to notify them.

## Tracking

This type is used to track the project manager's tasks and is completed by the project manager. This type of task is completed by clicking **Complete Task**. You do not need to add any contributors but you can add reader in the user roles tab. The initiator can choose to get a notification if the task is delayed and receive a notification before the due date.

## Route

This task is used to route files which could be documents (typically PDF's and DOC), image files or video files to multiple reviewers for their approval. For example, approve an artwork created by an agency. The project manager or the deliverable manager can set the route as sequential or simultaneous. The task is completed after all the approvers respond. Depending on the configuration, the predefined steps are displayed for an instance of the route task. If there are no predefined steps, only one step is shown by default. You can delete these steps or add new steps, edit the name of the route step, if required. The selection of approvers for the predefined steps is restricted to the performers selected in the Process Designer. When a resource category is selected, submit the resource request. The resource request is sent to the resource category head who in turn allocates the resource for the task. If the **Cancel Approval if Rejected** check box is selected for an approver, the task is canceled even before any other approver comments if this approver rejects the task. 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 approver can view the project and deliverable information by checking the check box **View Project and Deliverable Information**.

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 is brought down from a deliverable and you can move the consolidated file to the deliverable. The task initiator can also view a consolidated file with the comments entered by the all the reviewers.

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

### Multi-File Route Task

You can route multiple files of different formats, for example, PDF, DOC and video files 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. You can view and comment PDF files online via the WebDAV technology. You can download Word documents and comment in them. you can annotate videos directly using the video annotations tool online.

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

### Web Process Task

You can initiate a workflow with a web process task in it. The task initiator can manage the execution of the task with minimum or no manual intervention. This type of task is auto initiated. On completion of the earlier task in the workflow, the web service task is automatically initiated depending on the configuration. No contributors are required for this type of task.

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## Managing Tasks for a Deliverable Using the Visual View

A Visual Workflow view appears.

- You can view the tasks in a flow chart with the boxes representing the tasks with the start and the end dates.
- You can add new tasks for a deliverable by dragging a new box onto the canvas. Naming it appropriately, connect it at the right place, select the contributors and submit it.
- You can enter the task title for the newly added tasks by clicking the pencil icon and add contributors.
- You can change the dependencies between tasks by clicking the arrow icon.
- You can change the instructions for the contributors and the duration of the task for the contributor by clicking the contributor icon.
- You can view the current status of a task from the status bar above each task box. Blue indicates completed tasks, red indicates delays and green indicates in progress tasks.
- you can resize the canvas and exported it as an image or a PDF for reporting purposes.

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## Perform

Contributors or resources can perform the tasks assigned to the following ways:

1. **E-mail Notification:** E-mail notifications are sent to the contributors when a project manager or initiator submits a task and to the project manager or initiator when a contributor submits a response. Delay reminders for a project and task are sent via e-mails 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 e-mail notification sent to the contributor when a new task is submitted contains a link to the perform task screen.
2. **Perform mode of the Marketing Workbench application:** Contributors can view the tasks assigned to them by clicking **Perform** link. The list of tasks assigned to you are seen here. You can personalize the predefined search. There can be a primary and a secondary contributor. Both the contributors can contribute toward the task but the primary contributor closes and completes the task. In case of resource category, multiple resources can be allocated for a request and one of the resource is Primary resource.

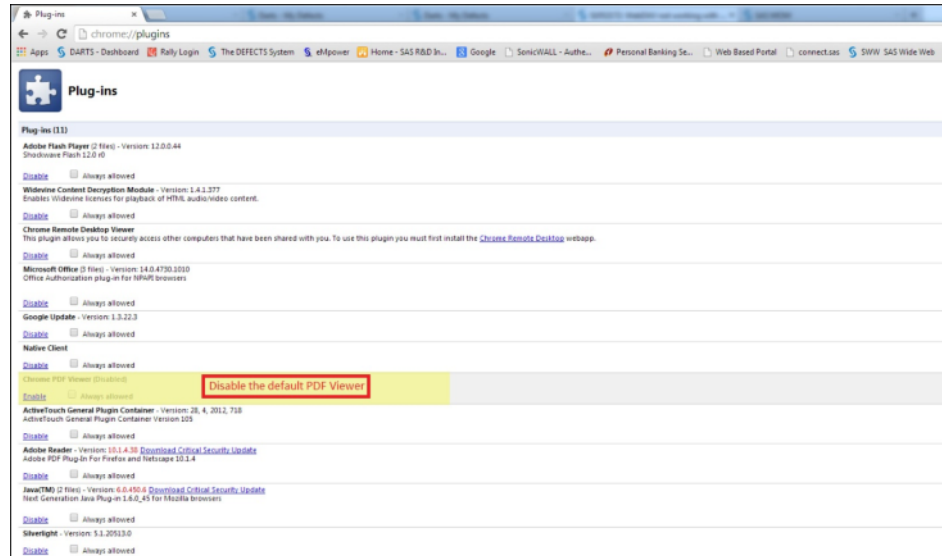
This screen shows a list of tasks with their step status being completed or active. Each row has a task tile link, which when clicked takes you to a task response screen. You can provide comments here and attach documents if required. You can also upload digital assets in response to the task that is, by providing final artwork for the deliverable. Based on the settings done by the administrator, the contributors or resources are allowed to click the breadcrumb links provided on the task response screen and traverse to the deliverable, project and brief screens. As the contributor or resource is traversing from the perform mode, all information is shown in a read-only format, regardless of the user role of the logged in user.

You can attach files and put in your response. You can view the project and deliverable details depending on the settings done by the task initiator. You can forward the task to another contributor if required.

While approving the job, if WebDAV is used then remember the following points:

- WebDAV works if Internet Explorer is the default browser.
- WebDAV does not work if Firefox is the default browser .
- If Chrome is the default browser, then do the following settings for WebDAV to work:
  - Type `chrome://plugins` in the browser.
  - Disable **Chrome PDF Viewer** setting and close the window.
  - Click the file for approval, Chrome asks to update plug-ins.
  - Click **Update Plug-in**, a new window is opened asking you to download the latest version. Download the latest version and close the window.
  - Go back to the tab where the .fdf file is opened and reload the page. Click **Run** this time, you might have to click this option twice. The file is opened for commenting.

Figure 30.7 Setting on Google Chrome for Approval



After a route task is completed, you 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 document .

While performing an assignment task, the contributor or the resource for the assignment tasks should enter all the details and upload any file if required. An Upload Digital Asset screen appears. The contributor or the resource can upload the original, preview and the thumbnail. Enter the expiry date and the business information for the asset. Save the uploaded asset. After uploading the artwork, the thumbnail appears on the task response screen. Submit the task by clicking **Submit**.

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

After all the tasks are completed the Deliverable Manager can mark the deliverable complete by going to the Deliverable information tab and changing the status. Similarly mark the project complete by changing the status of the project on the project information tab. Once the deliverable and project is marked complete, you cannot open the project and the deliverable.

---

## Marketing Workbench Reports

Marketing Workbench Reports display a list of configured reports. To launch the reports click **Reports** in the left pane on the Dashboard. 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 available:

- Contributor Information
- Marketing Process Efficiency Analysis
- Project Details
- Project List

Once the reports are generated, you can export the reports in PDF or Excel. You can create ad hoc reports as well for Marketing Workbench.





## Chapter 31

# Managing Resources

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## Resource Management

Resource Management is a module that allows resource managers or resource category managers to plan capacity of human resources for marketing campaigns or activities. It also allows the resource managers to allocate resources to tasks within the Marketing Workflow during campaign execution. A Resource Manager can view the allocations and availability of resources through the year and plan them against marketing activities or allocate them to marketing workflow tasks based on requests.

---

## User Roles

- **Marketing Manager:** Responsible for the planning and execution of projects.
- **Project Manager:** Responsible for creating and managing marketing projects within the Marketing Workbench module.
- **Resource Category Head or Resource Manager:** Responsible for the allocation and monitoring of resources. Could be responsible for one or more resource categories in the system.
- **Resource Category:** A group of resources having similar skills.
- **Resources:** Team members involved in the execution of projects. People allocated to tasks in workflows as contributors. They are managed resources and their time and allocations are managed by the resource manager or resource category head.

- Administrator: Responsible for the configuration of the application.

---

## Getting Started

To launch Resource Management, click **Resource Management** link provided on the Dashboard screen on the left task pane. Depending on your access rights that is, whether you are a Marketing Manager or a Resource Category Head, the Resource Request and/or Resource Allocation view is displayed, by default.

**Capacity Planning:** This tab can be configured to be visible if resource managers need to plan capacity of resources for strategic planning campaigns or activities.

**Resource Allocation:** This tab is visible to the resource category head who allocates the resources requested for doing a particular task

---

## Capacity Planning

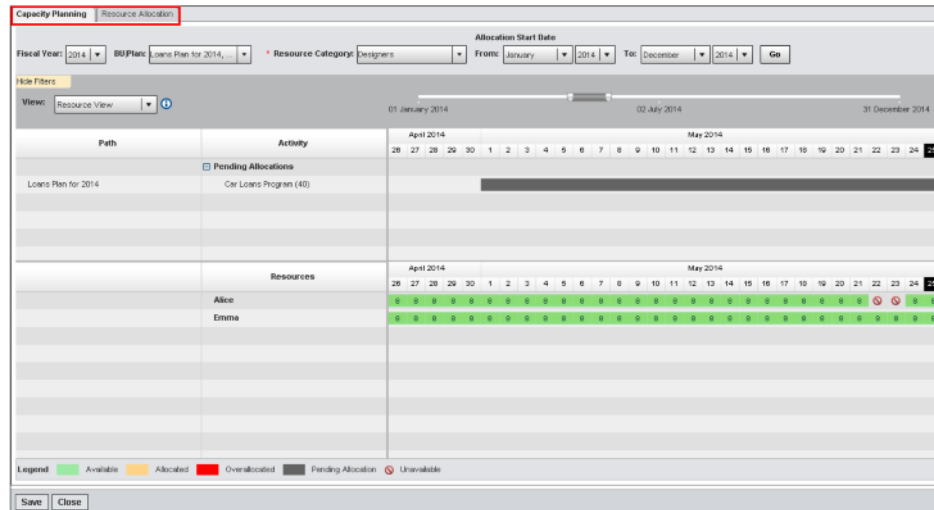
The users of SAS Marketing Operations Management system can be named as resources and assigned to various activities or in planning. Resource Management allows resources to be created, managed, and assigned by the Resource Category Head, who is in charge of a group of resources.

### ***Allocating Resources for Plans and Activities***

Directly from the Strategic Planner module, the marketing manager can send a resource request to the resource category head for a Plan or Activity. After the resource request is sent to the Resource Category Head, the request is seen in the Capacity Planning tab. Select the filters such as fiscal year, business unit or plan and the resource category on the top bar to see the resource request. Select the allocation start date. You can change the view to either the resource view or the activity view. In the resource view, you will see all the activities per resource and in the activity view you can see the activities and all the resources per activity.

The activity path is displayed in the first column and the activities are displayed in the second column. In the first section you can see the pending allocations in gray. To allocate the resources, click on the gray bar.

Figure 31.1 Capacity Planning



Clicking the gray bar, a Resource Allocation popup is displayed. You can select one or more resources. If a resource is marked obsolete they cannot be allocated for any activity. Enter the number of hours per day, per week. The requested hours and the allocated hours are displayed. After allocating the resource for the requested hours, click **OK**.

After the allocation the resource is seen in the second part of the screen where all the allocated resources are displayed. Save the allocations. The allocations for the plan or activity are completed and are seen in the Strategic Planner resource allocations for a plan or activity.

## Resource Allocation

From the Marketing Workbench module, a resource request is sent by a project or deliverable manager to the resource category head. This request is sent from a task for a resource. The resource category head can allocate the required resources.

### Allocating Resource for a Task

Using the filters on the top bar, the resource category head can allocate a resource for the request sent by the task initiator for a particular task in a project.

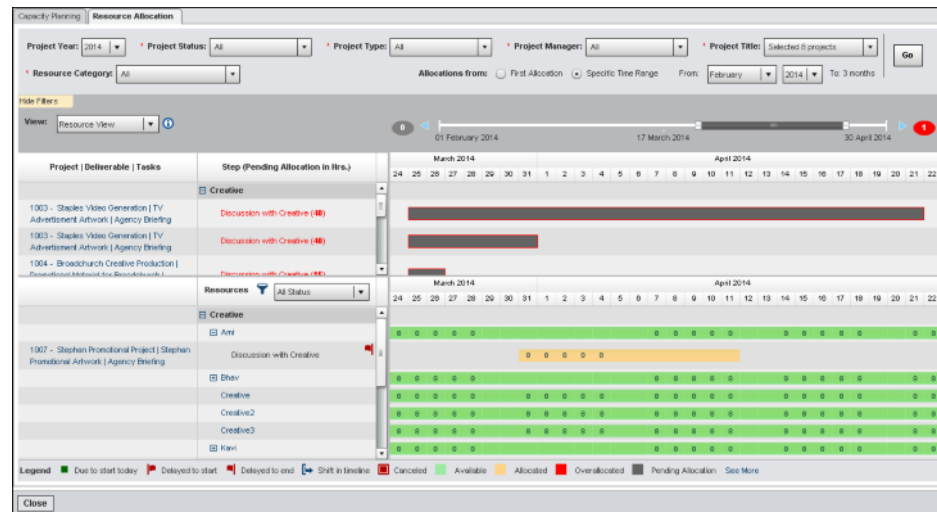
The project, deliverable and task path is displayed in the first column. In the first section you can see the pending allocations in gray. To allocate the resources click the gray bar. The following filters are available on the screen:

- **Select Project Year:** All projects whose start or due date falls in that year are shown.
- **Project Status:** Select active, canceled, completed, draft, new, on hold or all.
- **Project Type:** All configured project types are available for selection.
- **Project Managers:** All users who are project managers for one or more selected projects are seen here.
- **Project Title:** Select one or more projects or all the projects.

*Note:* All the above filters are dependent on each other. The drop-down values are populated based on what is selected in the previous drop down filter.

- **Resource Categories:** You see only those categories for which you are the resource category manager.
- **Allocations From or To:** Select to see from the earliest allocation for the selected project set or select a time frame of three months to see all allocations for the selected project set.

**Figure 31.2** Resource Allocation Tab



The following two views are available:

- **Resource View:** Enables you to see a resource-based view of pending allocations, resources available and their allocations for a selected set of projects
- **Project View:** Enables you to see a project-based view of resource allocations.

Clicking the gray bar, a Resource Allocation popup is displayed. You can select one or more resources. If there are more than one resources, you can mark a primary resource. This is the resource who is held responsible to complete the task.

Navigate via the calendar by weeks to allocate the resource for the required dates. Enter the number of hours per day, per week. The requested hours and the allocated hours are displayed. The resource manager can keep notes for the allocation in the **Notes** field.

The resource manager can choose to allocate the resource for hours greater than the available hours in the day. This accounts for over allocation. The availability of the resource is seen in red with the number of over allocated hours appearing as a negative number on the availability bar for that day. After allocating the resource for the requested hours click **OK**.

**Figure 31.3** Resource Allocation

**Resource Allocation**

Task : Agency Briefing (1006) Task Status : Draft  
 Start Date : 25 March 2014 Due Date : 21 April 2014  
 Project Title : Staples Video Gene... Project ID : 1003 Project Manager : John Lewis Deliverable Manager : John Lewis  
 Instructions for Resource Category Head :

Requested Hours : 40 Allocated Hours : 0

Select Week: April 2014

Resources	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Amit	0	0	0	0	0	0	0	0
Available :	0	0	0	0	0	0	0	120
Bhav	0	0	0	0	0	0	0	0
Available :	0	0	0	0	0	0	0	120

Select a New Resource: [Dropdown] Primary Resource

Notes : [Text Area]

Save Cancel

After the allocation the resource is seen in the second part of the screen where all the allocated resources are displayed. Save the allocations. The allocations for the project is completed and is seen in the Marketing Workbench task. Any pending allocations are still seen on the top part of the screen as a gray bar.

### Marking a Resource Unavailable

To mark a resource unavailable, click the name link of the resource. The resource details are displayed on the popup. Mark the dates the resource is unavailable and enter the reason. Click **OK** to save the details. That dates are seen on the availability bar for that resource with an icon of unavailability. The resource cannot be allocated on that day.

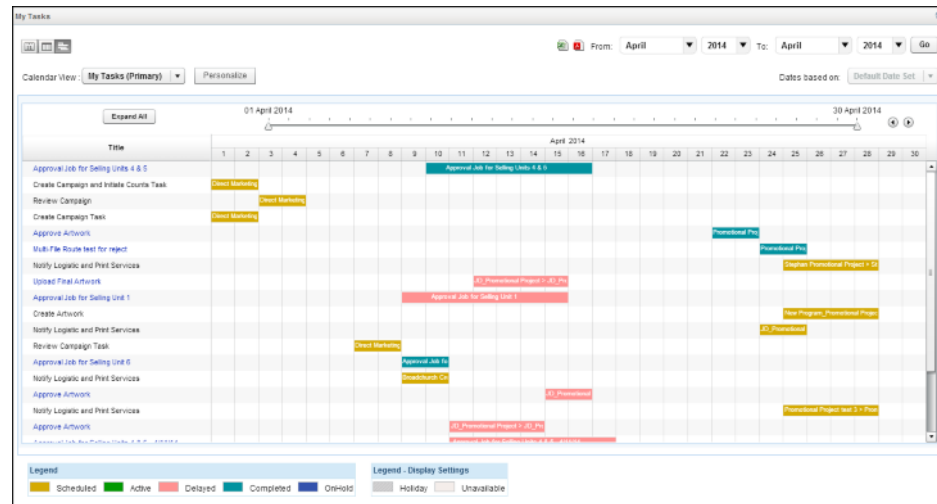
To mark the resource available, the resource manager can click **Mark as Available**.

---

## Viewing Your Allocations in 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 can view your allocations in a My Tasks (resource) Calendar in SAS Marketing Operations Management.

Figure 31.4 My Tasks Calendar



On the My Tasks (resource) calendar, you can view your tasks as a resource for a month, week, or in a gantt view. You can personalize your view using the filters provided and create multiple views, for example, per project view for a specific timeframe by selecting date filters. You can export the calendar to PDF or excel for reporting and other purposes.

*Chapter 32*

# Understanding Approvals

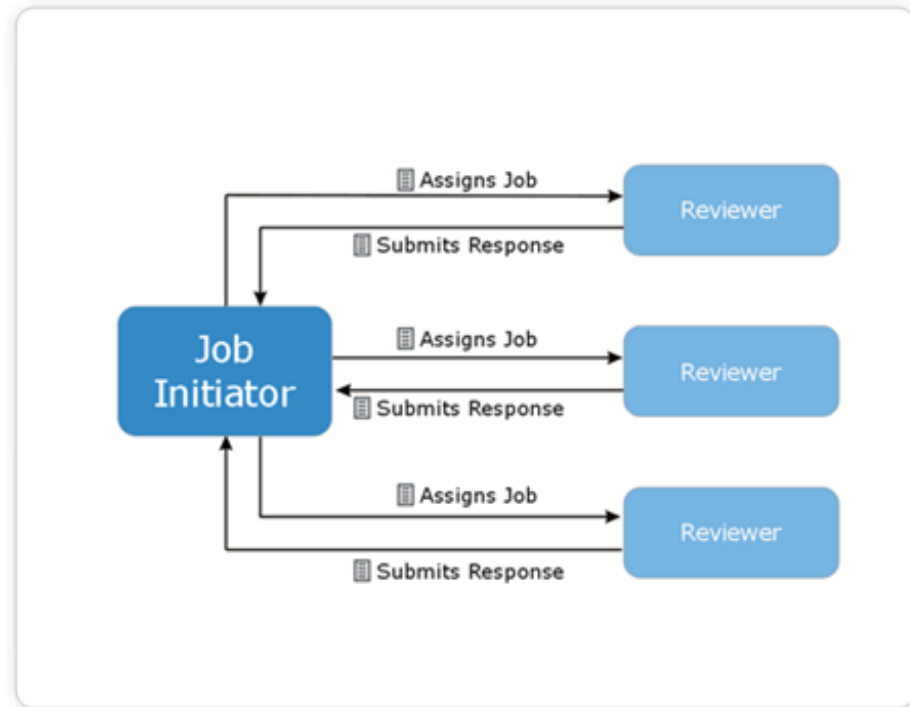
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## Overview

Figure 32.1 Overview



SAS Marketing Operations Management’s approvals electronically routes files for review and approval. The reviewers can examine the file by providing comments and annotations using standard tools such as Adobe Acrobat, MS-Word (.doc, .docx), MS-Excel (.xls, .xlsx) and Flash 11 onwards. The application displays the status of the route, automatically reminds approvers of pending deadlines and tracks the comments of the approvers across multiple revision cycles of a file.

---

## Review Cycle in Approvals

- **Document or Video submission:** With the help of approvals, the initiator can route a document or video to a list of approvers and provide instructions for individual approvers.
- **Document or video review:** The approvers receives an e-mail notification regarding the availability of the document or video for review. After the review is done, the user submits the document or 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 the approval cycle. The application tracks these multiple revisions resulting from the proposed changes made by the approvers.

---

## User Roles

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 selected by the initiator to review the files and provide comments.
- **Reader:** The user who is selected by the initiator to read the reviews but not provide any review comments.

---

## Getting Started

### Overview

After logging on, click **Approvals** link on the Dashboard screen on the left pane. The application is launched.

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

- **My Approval Jobs:** The jobs initiated by the user are displayed.
- **My Reviews:** The pending jobs of the user are displayed.
- **My Routes:** You can view the list of routes created by the user.

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

### Creating Approval Jobs

#### Overview

By default My Approval Jobs screen with a search facility appears. You can search for specific jobs by specifying search criteria such as status, start and due date and the job title contains (keyword) and clicking **Search**. The result appears 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 active or completed the job cannot be modified.

#### Creating a New Job

Select the job type and click **Create Job** at the bottom of the screen. You can create two types of jobs:

1. Approvals Job: You can route one file for approval.

- Multi-File Approvals Job: You can route multiple files of different formats for approval.

The User Interface for both the type of approvals job is similar. The figure below shows multi-file approval.

**Figure 32.2** Multi-File Approval

The figure below shows single file approval.

**Figure 32.3** Single File Approval

The following sections are displayed on the above screens:

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

You can give instructions for each approver and specified the duration in number of days and the number of hours allocated for the approval. If the same set of approvers needs to be used for future approvals, you can save the routes by giving a name and clicking **Save Route**. You can delete the selected approver by clicking **Delete Approvers**.

*Note:* If the approver rejects the job and the check box **Cancel Approval if Rejected** is selected for this approver, then that job is canceled regardless of whether the other approvers have approved or rejected the job.

- **Advanced Approvals Job Information:** You can select the route method as simultaneous or sequential. In the sequential route the approvers can review the document in a sequence that is, at any given time only one approver can review the document. In the simultaneous route, all the approvers can review the document simultaneously. Enter the start date and the number of days after which the reminder should be sent. The due date, status and the %complete are displayed.

Select the following check boxes to send e-mail notifications:

- **CC to me:** Select this check box to make sure the initiator receives a copy of the e-mail that is sent to the approvers as a job delay reminder.
- **Notify if job is delayed:** Select this check box 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 approver.
- **Readers:** You can select the readers for this route by clicking **Add User**.
- **Save as Draft:** Save the new job as a draft, to be submitted later. In the job list this job appears with the status as Draft.
- **Submit:** Submits the job. The job begins and e-mail notifications are sent to the selected approvers to begin their review. If you select a sequential route, mails are sent sequentially to the approvers. If you select a simultaneous route, all the approvers in the route receive the e-mail at the same time.
- **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.

### **Editing a Submitted Job**

After the job is submitted, the job initiator can go back to the job screen by clicking the job name link. A View Job screen appears. You can perform the following operations on this screen:

- **Cancel Steps:** You can select the approver that you want to delete from this route and click **Cancel Steps**.
- **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.

---

## Reviewing an Approval Job

### Viewing Pending Jobs

Click **My Reviews** link provided on the left pane (Approvals). In the first section the user can search for a specific pending job by selecting the status, the start and due date and the job title contains and click **Search**. 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

### Approving or Rejecting a Pending Job


The approver can review the job in the following ways:

1. Click the link received in the e-mail.
2. Click the job name link from the pending job list.

An approve job screen appears where the details of the job are displayed in a read-only format:

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

Download the file to review it and upload it back. Select the summary and add comments. Click **Submit** to submit the job. You can forward the job to another user by clicking **Forward Job** and selecting the new approver. Provide instructions for the approver.

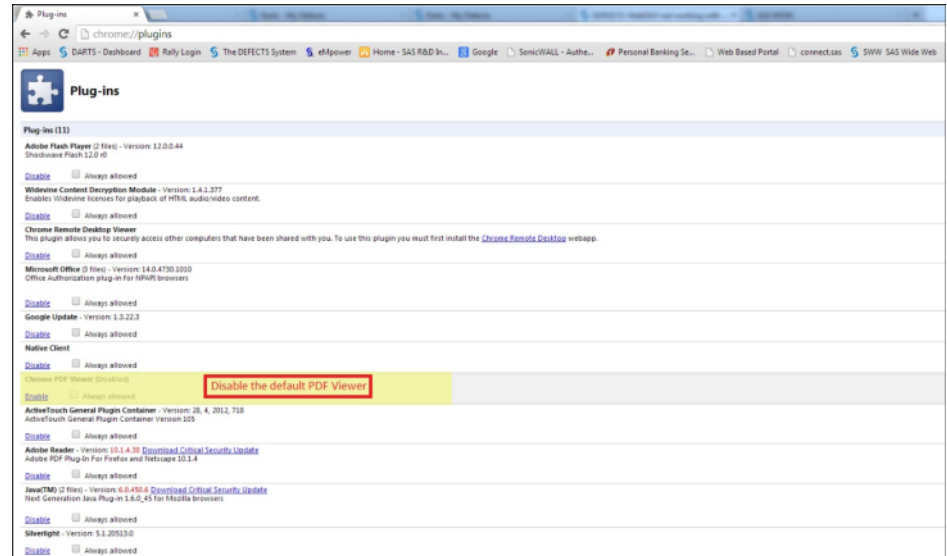
By clicking  icon on the right, the reviewer can view the comments of other reviewers.

#### **In case WebDAV is enabled:**

While approving the job, if WebDAV is used then remember the following points:

1. WebDAV works if Internet Explorer is the default browser.
2. If Firefox is the default browser WebDAV does not work.
3. If Chrome is the default browser, then do the following settings for WebDAV to work:
  - a. Type `chrome://plugins` in the browser.
  - b. Disable Chrome PDF Viewer setting and close the window.

Figure 32.4 Chrome Settings



- c. Click on the file for approval, Chrome asks to update plug-ins.
- d. Click **Update Plug-in**, a new window is opened asking you to download the latest version. Download the latest version and close the window.
- e. Go back to the tab where the .fdf file was opened and reload the page. Click **Run** this time, you might have to click twice on this option. The file is opened for commenting.

With the help of WebDAV (Web Distributed Authoring and Versioning) technology, the approvers can view the PDF for approval and enter their comments online and submit the approvals job. When the approver clicks on the link of the PDF to be approved, browser window opens, the Adobe Acrobat toolbar is present within the browser for commenting on the document. On clicking **Comment and Markup** menu, a new toolbar having the following options is available:

1. **Save and Work Offline:** The approver can work on the PDF offline and later upload the file with the comments. To download the file click **Save and Work offline**.
2. **Send and Receive Comments:** After adding the comments click **Send and Receive comments** to send the comments and close the browser. In a simultaneous route if another approver is working on the file, then the comments entered by one approver can be viewed by the other.

*Note:* If the filename of the uploaded file has ~ character, then **Send and Receive** and **Save and Work Offline** buttons are not visible to the approver who opens the PDF file. To enable these buttons, click the Acrobat icon in the toolbar.

### In case SAS Marketing Operations Management Annotations is enabled: Approving or Rejecting Image or PDF Files

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

- Image files will always open using the SAS MOM Tool.
  - PCX, TIFF, PCD, JPG, TIF, PICT, SGI, BMP, GIF, PNG, PSD, WPG, JPE, JPEG

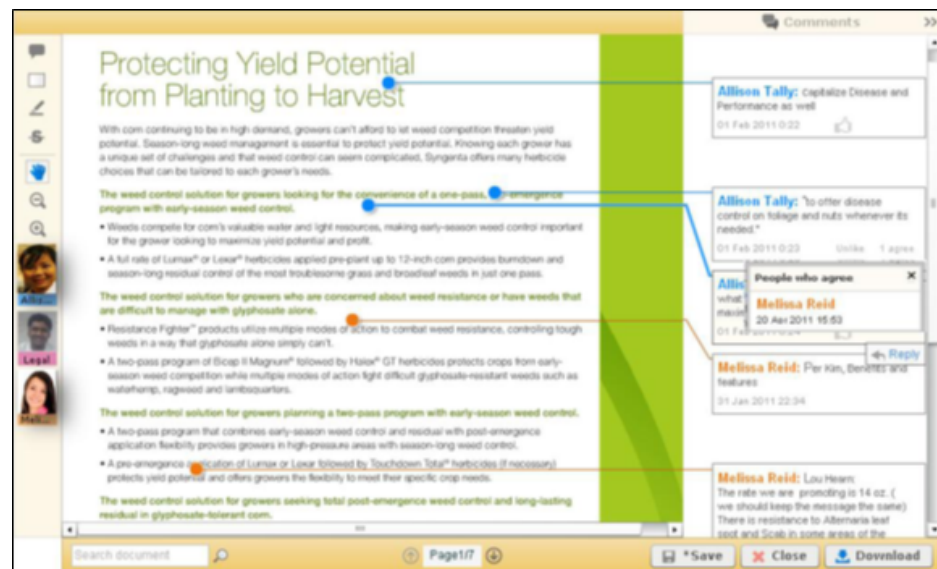
- If a PDF is uploaded, the system checks which method of approvals is set and will open the file accordingly. If Media Annotations is set the file will open using the SAS Marketing Operations Management Annotations Tool.

When the approver clicks on the link of the files to be approved, the file is opened in a browser for commenting. You can perform the following actions on the screen:

1. The icons on the left help to do the following:
  - a. To enter comments
  - b. Mark an area and put in comments
  - c. Mark an area and strikeout text
  - d. Can use the hand mode to scroll, zoom out and zoom in.
  - e. The names and photographs of the approvers appears. If there are multiple approvers, then the names and photographs of all the approvers are displayed here.
2. A reviewer can like a comment made by another reviewer.
3. The initiator of the approval task can see a list of comments with responses and also gather a vote on the number of approvers who agree with a comment.
4. An approver can reply to another's comment.
5. The approver can save the comments and send it later
6. The approver can close the window.
7. The approver can download the file for reference.

As an approver of an artwork or PDF, using the *Media Approvals* tool, you can 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 comments can be saved and the job can be submitted by clicking **Submit**.

**Figure 32.5** Approving a File Using SAS Marketing Operations Management Annotations



**Approving or Rejecting a video file:** The following video files are supported:

- FLV, WMV, ASF, MOV, AVI, MPEG, MPG

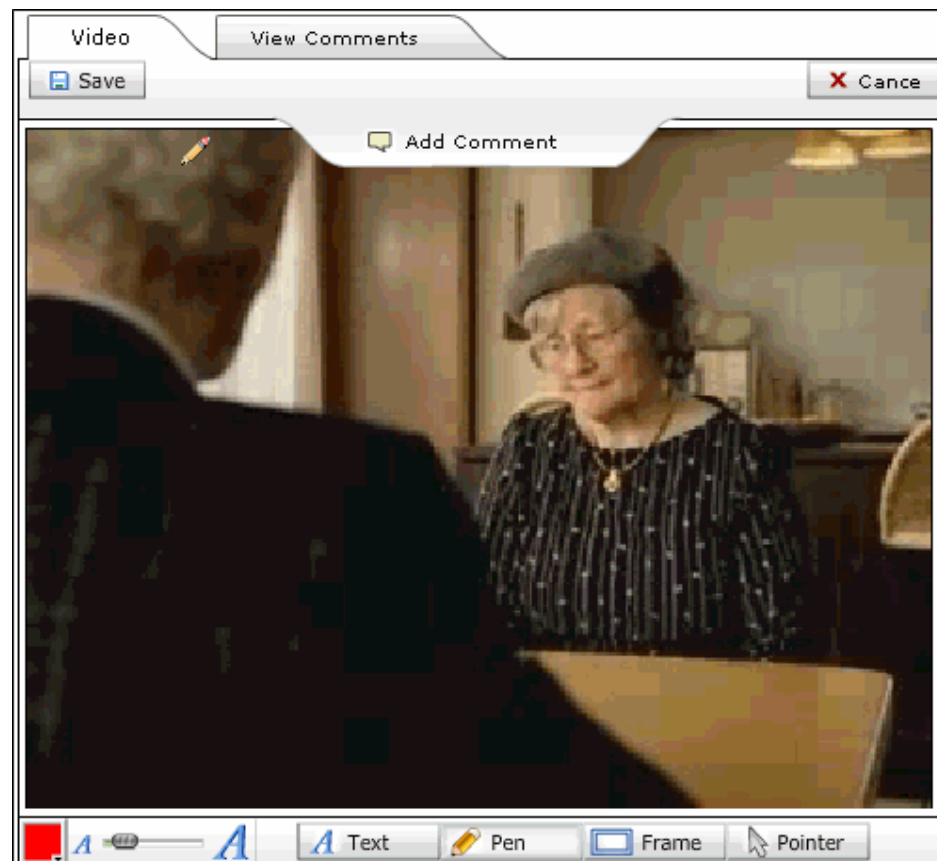
An approval job for video files can be initiated and submitted. The approver of the video file can view the video file and add comments by clicking **Add Comments**.

You can perform the following operations:

1. Change the color of the text
2. Increase or decrease the size of the text
3. Enter a textual comment
4. Mark a section using the pen tool
5. Mark a section using the frame tool
6. Erase a comment by using the pointer tool
7. Save the comments entered by a user by clicking **Save**
8. Cancel the operations by clicking **Cancel**
9. You can view the comments entered by the previous approvers by clicking **View Comments** tab

After all the comments are saved, you can submit the response. On completion of the job the user can view the consolidated file with all the comments.

**Figure 32.6** Approving a File Using Video Approvals



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## Comparison between Media Annotations Tool and Adobe Acrobat

Media approval is not designed to replicate the Adobe Acrobat functionality. This tool is used by clients without investing in Adobe licenses. In case complicated artworks are sent for approval, then Adobe should be used instead of Media Approvals.

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

The following table provides a summary of the user experience for the available annotation alternatives.

**Table 32.1** *User Experience*

SAS Marketing Operations Management's Media Annotation Tool	Within SAS Marketing Operations Management's media annotation feature, users can markup all supported files using the highlight text feature, markup an area, leave comments, and strike through text for PDF files. Users can comment on and markup supported video and image files as well.
Adobe Acrobat Offline	<p>The user experience for the offline review mode is consistent with the functionality available in SAS Marketing Operations Management's Media Annotations feature for supported video files and image files.</p> <p>For the review of PDF files, users can download the files to their desktop and using Adobe Reader X. They can leverage the full suite of annotation features available in Adobe Standard and Professional. A consolidated file is created for the review initiator but users cannot see other reviewer's comments live.</p>
Adobe Acrobat WebDAV mode	<p>The user experience for the WebDAV review mode is consistent with the functionality available in SAS Marketing Operations Management's Media Annotations feature for supported video files and image files.</p> <p>For the review of PDF files, users can annotate the PDF within the browser using the annotation features available in Adobe Standard and Professional. Users can see other reviewer's comments live and a consolidated file is created for the review initiator.</p>



**Table 32.2** Comparison between Media Annotations Tool, Adobe Acrobat in the Offline Mode and Adobe Acrobat in WebDAV

Feature	Media Annotations Tool	Adobe Acrobat Offline	Adobe Acrobat WebDAV Mode
Additional Software Needed	No	Dependent on the current processes – The creator of the PDF files routed for review should have an Adobe Professional or Standard license. Reviewers need Adobe Reader X on desktop (free version).	Yes – Reviewers leveraging WebDAV need to have Adobe Standard or Professional on their desktop. Adobe licensing fees associated.
Ability for the review initiator to see consolidated reviewer comments	Yes	Yes	Yes
Reviewers can see other reviewer comments real time (online collaboration for simultaneous reviews)	Yes	No	Yes
Ability to edit PDF files Online	Yes	No	Yes
Ability to leverage full palate of Adobe Professional and Standard capabilities for PDF annotations	No	Yes – with Adobe Reader X (free version)	Yes
Annotate large PDF files (More than 5000x5000 pixels)	No	Yes	Yes
Annotations supported for Image files (for example, Jpeg)	Yes	Yes	Yes
Annotations supported for flat PDF files	Yes	Yes	Yes
Annotations supported for multi-layered PDF files	No	Yes	Yes
Annotations supported for Text Based PDF files	Yes	Yes	Yes

Feature	Media Annotations Tool	Adobe Acrobat Offline	Adobe Acrobat WebDAV Mode
Ability to like another user's comment	Yes	No	No
Ability to reply to a comment as a threaded discussion	Yes	No	No
Ability to timestamp a user's comment	Yes	Yes	Yes
Ability to download the PDF with associated reviewer comments	Yes	Yes	Yes
Ability to annotate PDF files that are password protected	No	Yes	Yes
Ability to annotate PDF files that have <i>multiple blended transparency groups</i>	No	Yes	Yes
Ability to annotate PDF files that have Java script embedded to perform actions	No	Yes	Yes
Ability to annotate a PDF with 3-D objects	No	No	No
Ability to annotate a PDF which is a restricted file	No	No	No

---

## Viewing a Completed Job

After the job is approved or rejected the status of the job changes to Complete. The initiator can view the completed job by clicking the job title link on the File I am seeking approvals for screen. A View Job screen appears with the job details. Once the job is complete, the system consolidates the comments from all the documents uploaded by the approvers and saves it as a consolidated word document. This consolidated document can be viewed by the Job Initiator. You can create a new revision of the job by clicking **Create New Revision**. While creating a new revision, the reviewers are selected by default, you can add new reviewers and delete the previous ones. The files for approval are not carried forward. You can upload new files. Import notes from the Word document are also transferred while creating revisions of approval jobs.

Figure 32.7 Create a Revision

View Job

Job Name: Multi-File Approvals Job - MultiFile - 51082378  
 Description: Description for Multi-File Approvals Job  
 Job Initiated by: System Administrator  
 Route:

Files For Approval

File for Approval	Review Status	Status	Consolidated File	More Info
Arbwork.pdf	Approved	Completed	View File	f

View Review Details

Approvers

Step Title	Group	Approver	Cancel Approval if Rejected?	Status
Approved by user10 (user10)	All Users	user10	<input type="checkbox"/>	Completed
Approved by user100 (user100)	All Users	user100	<input type="checkbox"/>	Completed

Note: This approver will be canceled if the selected user rejects it.

Advanced Approvals Job Information

Route Method: Simultaneous	Due Date: 25 February 2014
Start Date: 25 February 2014	
Actual End Date: 25 February 2014 10:22 AM	
Job Status: Completed	% Complete: 100%
Revision: 1	<input type="checkbox"/> Notify me when response is submitted

Create New Revision Done

## My Route


### Viewing Routes

These are the pre-defined routes which help in reuse of commonly used list of approvers. Click **My Route** on the left menu (Approvals). A View My Routes screen appears with a list of configured routes. By clicking on the name link of a particular route the user can edit the route details.

### Creating a New Route

Click **Create Route** at the bottom of the View My Routes screen. A Create Route screen appears.

Enter following details:

1. Route Name and Description: Route name and description can be entered.
2. Approvers: Select the approvers by clicking  icon for this route or by entering 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.

To add more approvers click **Add Approvers**.

## Approval Reports

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

To view approval reports click **Reports** link on the left pane of the Dashboard screen. List of existing reports for the Strategic Planner module are displayed by default. To view the approvals reports click **Approvals** link.

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 32.8** Approval Report

The screenshot shows a web-based interface titled "Approval Jobs". It features a "Select Filters" section with the following elements:

- Job Start Date:** A range selector with "From" and "To" labels. The "From" date is "01 April 2014" and the "To" date is "30 April 2014". Both date fields have calendar icons to their right. A "Clear" button is located to the right of the "To" date field.
- Job Status:** A row of radio buttons with labels: "New", "Draft", "Active", "Canceled", and "Completed".
- Initiated by:** A dropdown menu with the text "Select" inside.

At the bottom of the filter section, there are two buttons: "Generate" and "Cancel".

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

## Chapter 33

# Managing Product Information

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## Overview

Product Information Management system enables marketing departments in product-based businesses to maintain a central repository of product information that can be used to feed multi-channel marketing content. Marketers can supplement standard product

metadata stored in corporate master data systems with information that is specifically applicable to marketing activities.

---

## User Roles

- **Authors:** The product information is created and maintained in the Product Information Management repository by the authors. They could be product managers and content managers who are system users.
- **Readers:** System users or groups who have access to the Product Information Management system and the product information within it. They would primarily be consumers of the product information. They have access to read the information but not to edit or change it in any way.
- **Approvers or Reviewers:** System user who is assigned to approve the product information entered in the Product Information Management system. The approvers or reviewers can view the product information, which is routed to them for approval and can submit comments and set summary value as approved or rejected.

---

## Getting Started

Click the **Product Information Management** link on the left pane. Depending on the configuration, you can either start with the products or the stock keeping units. The following screen is displayed. By default, the list of products is displayed if the starting point is set to products by the administrator.

The left pane includes links where products, stock keeping units, packages, packaging elements, product components, and product component contents can be created, updated, and sent for approval. The **Create, Delete, Mark as Active, Associate, and Dissociate** options are visible only in a nonintegrated mode. This is set by the administrator. Associating of entities is not allowed in a nonintegrated mode. You can associate only claims and digital assets.

---

## Managing Products

### Overview

In project management, products are the formal definition of the project deliverables that make up or contribute to delivering the objectives of the project. In insurance, the policies are considered products offered for sale by the insurance company that created the contract. When you log on to the Product Information Management system for the first time, search for the products by entering the search criteria. Enter at least one of the search criteria. The list of products is displayed on the content screen.

### Creating Products

To create products, click **Create**. The Create Product screen appears. Enter the product details such as the name, description, number, category, and save it.

On saving the product information, a view product screen is displayed with tabs where the product information is displayed in a Read-Only mode. You can edit it and mark as inactive. The stock keeping units tab has the information of the stock keeping units associated to the product. You can search for the existing units associated to the product by entering keywords in the search section. This search is not personalized.

You can create new stock keeping units from this screen itself by clicking **Create**. Click **Associate** to associate existing stock keeping units. A list of stock keeping units, which are not associated is displayed. You can remove the association by selecting the association and clicking **Remove Association**.

Products can be associated to a published claim available in the claims management repository through the claims tab. You can search for the existing claims associated to the product by entering keywords in the search section. Click **Associate** to associate claims and click **Remove Association** to remove the selected association.

Associate digital assets from the digital library to the product by clicking **Associate**. Select the assets to associate from the popup. From the digital asset tab, you could download the selected assets. You can upload assets into the digital library, depending on your access rights.

### **Batch Update Products**

To update multiple products at one time, select the products and click **Batch Update**. At a time, you can update 100 products. You can select the fields that you want to update and select the operator for each field. If the operator is **Change To**, then enter the value. If the operator is **Clear**, then the value entered previously is cleared. To add more fields, click **Add Field**.

Click **Update** to save the changes made. A confirmation is displayed with a list of errors, if any.

### **Validations for Batch Update**

You can configure form or sub-form and can configure display strategies for the selected fields through UI Framework tool. Most of them are used for validations for batch update. Here is the list of core validations that are applicable for batch update functionalities in the Product Information Management module:

- The fields from a section are not available for batch update for the following reasons:
  - That section is hidden
  - Rule based display is allowed on the same section, but the edit option is not configured for that section
  - Conditional display is allowed on the same section, but edit option is not configured for that section
- The fields from any section are not available for batch update if field visibility is set to NO or FALSE.
- The fields belonging to the following field types or UI types are not available during batch update:

BINDER

FILE

XML

XMLTEXT

HIDDEN

DISABLE is set to YES through UI framework

Display Type is set to READONLY through UI framework

PRIMARY KEY

Auto Generate is set to YES and ObjectIDSeries is configured for the respective field

Field is of type PASSWORD

Field with UI type as range calendar (RANGECALNDAR)

Field of type web service

- The facet is not displayed in the list of related facets (during batch update configuration) if any of the field is not selected for that facet in UI framework.

## Managing Stock Keeping Units

### Overview

A store's product and service identification code, often portrayed as a machine-readable bar code that helps the product be tracked for inventory. Stock keeping units are used by suppliers within their data management systems to help track amounts of product in inventory and units of billable entities sold. Stock keeping units help suppliers be able to track efficiently the numbers of individual variants of products sold or remaining in stock.

Click **Stock Keeping Units** link on the left pane. When you log on to the Product Information Management system for the first time, search for the stock keeping units by entering the search criteria. Enter at least one of the search criteria. The list of stock keeping units is displayed on the content screen.

### Creating Stock Keeping Units

To create stock keeping units:

1. Click **Create** on the Stock Keeping Units screen. The Create Stock Keeping Unit screen appears.
2. Enter the details such as the name, description, number, and type and save it.

On saving the information a view stock keeping unit screen is displayed with tabs where the information is displayed in a Read-Only mode. You can edit it and mark as inactive. The Packages tab displays the information of the packages associated to stock keeping units. You can search for the existing packages associated to the stock keeping units by entering keywords in the search section.

To create new packages from this screen:

1. Click **Create**.
2. Click **Associate** to associate existing packages. A list is displayed.

*Note:* To remove an association, select the association and click **Remove Association**.



You can associate the stock keeping units to product components created in the system through the Product Components tab. To create new product components from this screen itself, click **Create**. You can search for the existing product components associated to the stock keeping units by entering keywords in the search section.

Click **Associate** to associate product components. You can associate stock keeping units to a published claim available in the claims management repository through the claims tab. You can search for the existing claims associated to the stock keeping unit by entering keywords in the search section.

To associate the digital assets from the digital library of the stock keeping unit, click **Associate**. Select the assets to be associated. From the digital asset tab, you could download the selected assets. You can upload assets into the digital library, depending on your access rights.

### **Batch Update Stock Keeping Units**

To update multiple stock keeping units at one time, select the stock keeping units and click **Batch Update**. At a time, you can update 100 stock keeping units. You can select the fields that you want to update and select the operator for each field. If the operator is **Change To**, then enter the value. If the operator is **Clear**, then the value entered previously is cleared. To add more fields, click **Add Field**.

Click **Update** to save the changes made. A confirmation is displayed with a list of errors if any.

For more information, see [“Validations for Batch Update” on page 283](#).

## **Managing Packages**

### **Overview**

A product needs packaging. There are multiple types of packaging required for any product for example, the outer box, the inner plastic packaging, and so on. Every product can have printable or non-printable packaging such as the outer box is printable but the inner plastic packaging is non-printable.

Click **Packages** link on the left pane. When you log on to the Product Information Management system for the first time, search for the product packages by entering the search criteria. Enter at least one of the search criteria. The list of product packages is displayed on the content screen.

### **Creating Packages**

To create packages click **Create**. A create package screen is displayed. Enter the details such as the name, description, number, and type and save it. On saving the information a view package screen is displayed with tabs where the information is displayed in a Read-Only mode. You can edit it and mark as inactive. The packaging elements tab displays the information of the packaging elements associated to the package. You can search for the existing packaging elements associated to the packages by entering keywords in the search section. This search is not personalized.

You can create new packaging elements from this screen itself by clicking **Create**. Click **Associate** to associate existing packages. A list of packaging elements, which are not

associated is displayed. To remove the association, select the association and click **Remove Association**.

### **Batch Update Packages**

To update multiple packages at one time, select the packages and click **Batch Update**. At a time, you can update 100 packages. You can select the fields that you want to update and select the operator for each field. The operator can be change to, where you can enter the value. If the operator selected is clear, then the value entered previously is cleared. To add more fields click **Add Field**.

Click **Update** to save the changes made. A confirmation is displayed with a list of errors if any.

For more information, see [“Validations for Batch Update” on page 283](#).

---

## **Packaging Elements**

### **Overview**

A product needs packaging. Each package can consist of different elements such as a leaflet that should be part of the package, a spoon, and so on.

Click **Packaging Elements** link on the left pane. A list of existing elements is displayed.

### **Create Packaging Elements**

To create packaging elements, click **Create**. The Create Packaging Element screen is displayed. Enter the details such as the name, description, number, type, the dimensions, unit of measure, and save it.

On saving the information, a view package screen is displayed with tabs where the information is displayed in a Read-Only mode. You can edit it and mark as inactive.

---

## **Product Components**

### **Overview**

Product components are generally lower-level components of the product and are integrated to build the product. Product components can be a part of the product delivered to the customer or serve in the manufacture or use of the product. Click **Product Components** link on the left pane. When you log on to the Product Information Management system for the first time, search for the product components by entering the search criteria. Enter at least one of the search criteria. The list of product components is displayed on the content screen.

### **Create Product Components**

To create product components click **Create**. The Create Product Component screen is displayed. Enter the details such as the name, description, number, type, and save it.

On saving the information, the View Product Component screen is displayed with tabs where the information is displayed in a Read-Only mode. You can edit it and mark as inactive. The product component contents tab has the information of the product component contents associated to the product component. You can search for the existing product component contents associated to the product component by entering keywords in the search section. This search is not personalized. Product components can be associated to a published claim available in the claims management repository through the claims tab. You can search for the existing claims associated to the product component by entering keywords in the search section.

To associate product component contents or claims on the respective tabs, click **Associate**. To remove the selected association, click **Remove Association**.

### **Batch Update Product Components**

To update multiple product component at one time select the product components and click **Batch Update**. You can select the fields that you want to update and select the operator for each field. The operator can be Change To, where you can enter the value. If the operator selected is **Clear**, then the value entered previously is cleared. To add more fields click **Add Field**.

Click **Update** to save the changes made.

For more information, see [“Validations for Batch Update” on page 283](#).

---

## **Product Component Contents**

Click **Product Components Content** link on the left pane. When you log on to the Product Information Management system for the first time, search for the product component contents by entering the search criteria. Enter at least one of the search criteria. The search is personalized. The list of product component contents is displayed on the content screen.

To create new product component content, click **Create**. Enter the relevant data and save.

On saving the information a view product component content screen is displayed where the information is displayed in a Read-Only mode. You can edit it and mark as inactive.

---

## **Approvals**

After creating the products, stock keeping units, packages, or product components with the necessary information, an approval is required by the stakeholders. Select the product, stock keeping units, packages, or product components and click **Send for Approval**. A job is created and the status of the entity changes to **In-Review**. The entity is available in a Read-Only mode and cannot be edited.

An approvals job details screen is displayed. The list of entities to be approved is seen. The job initiator can edit the entity by clicking the entity name link. The Write access on the entity is given by the administrator.

Select the approvers and submit the job by clicking **Submit**.

Figure 33.1 Approvals Job Details

To see the list of approval jobs click **My Approval Jobs** on the left pane.

Figure 33.2 My Approval Jobs

Job Name	Status	Start Date	Due Date	% Complete
Approval Job 1 for Products	Draft	25 March 2014	28 March 2014	0%
Approval Job 1 for Product Components	Active	25 March 2014	27 April 2014	0%
Approval Job 2 for Products	Active	25 March 2014	27 April 2014	11%
Approval Job for Products	New	14 May 2014	15 May 2014	0%
Approval Job for Selling Unit 1	Active	08 April 2014	15 April 2014	20%
Approval Job for Selling Unit 1	New	08 May 2014	12 May 2014	0%
Approval Job for Selling Units 2 & 3	Active	11 April 2014	17 April 2014	14%
Approval Job for Selling Units 4 & 5 - 411174	Active	11 April 2014	17 April 2014	42%

An active job can be terminated by the job initiator or the approvers can be modified if required by clicking the job name link on the My Approval Jobs screen.

## Approving the Pending Jobs

To approve the jobs sent to you, click **My Reviews** on the left pane. All the pending jobs for you are listed.

Figure 33.3 My Reviews

Job Name	Step Title	Job Status	Job Initiator	Start Date	Due Date
Approval Job 1 for Products	Approval 1	Active	System Administrator	25 March 2014	28 March 2014
Approval Job 1 for Product Components	Approval 1	Active	System Administrator	25 March 2014	28 March 2014
Approval Job for Selling Unit 1	Step 1	Active	System Administrator	09 April 2014	15 April 2014
Approval Job for Selling Units 4 & 5 - 411174	Step 1	Active	System Administrator	11 April 2014	17 April 2014
Approval Job for Selling Units 2 & 3	Step 1	Active	System Administrator	11 April 2014	17 April 2014

Click the job name link to view the job details. Approve or reject the job by entering comments and upload an attachment if required. Submit the job to complete the review. You can forward the job to another approver, if required.

---

## Batch Update History

The user can view the history of all the changes made to all the entities in the Product Information Management system by clicking **Batch Update History** on the left pane.

A job list is displayed, by default the last 25 jobs are displayed. Click on the job number link to view the change history for the entity.

To view the job, click the job number. A list of errors if any is shown.



*Chapter 34*

# Understanding the Digital Library

---

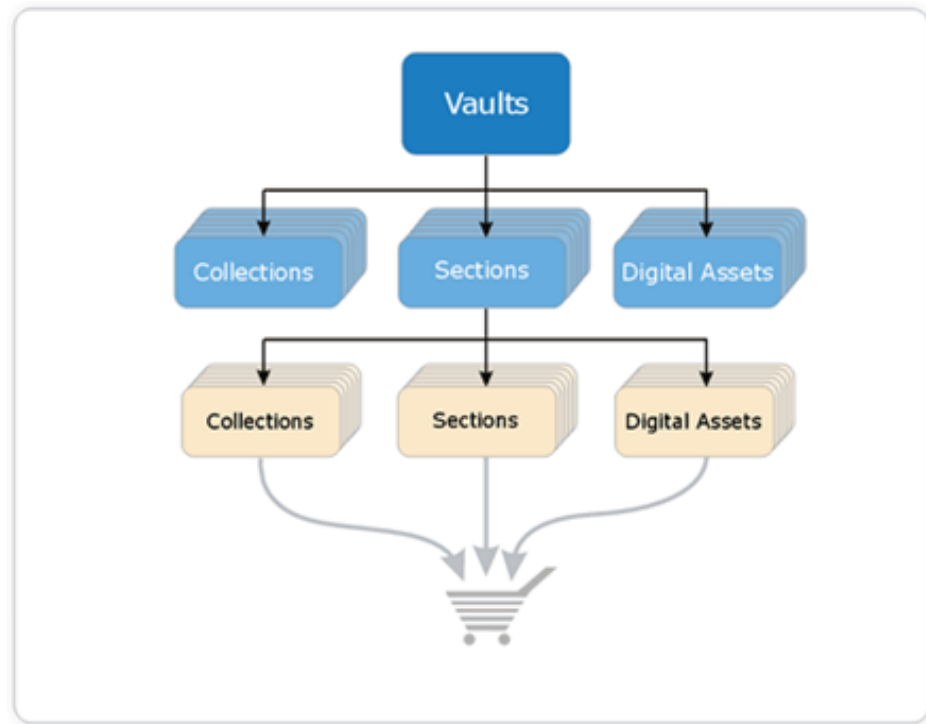
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---

## Digital Library User Guide

### Overview

Figure 34.1 Overview



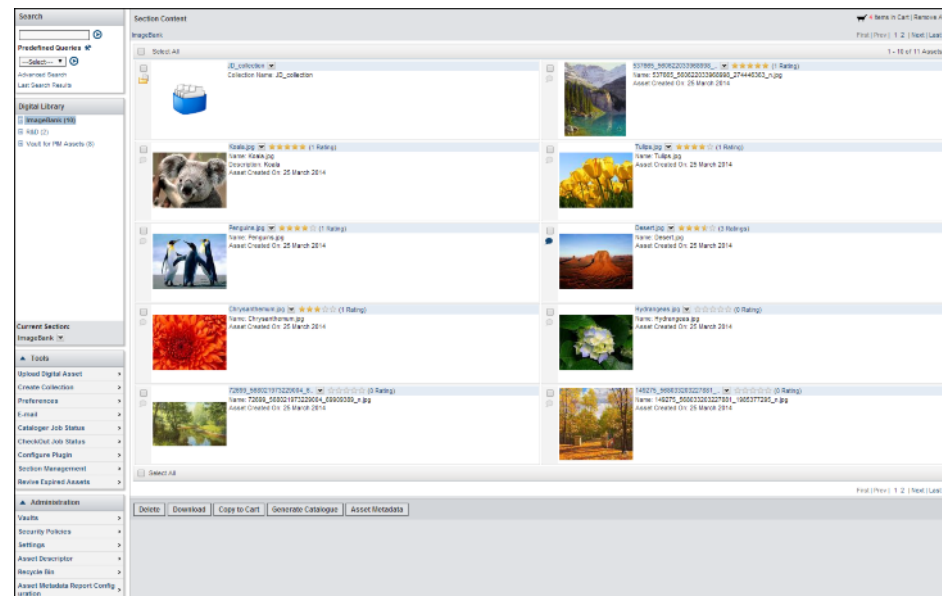
The Digital Library organizes digital assets related to packaging graphics, sales brochures, point-of-purchase, advertising and various communications resources in a centralized, secure repository called a digital asset manager. You can search, browse and retrieve and link these digital assets for use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

### Getting Started

After logging on click **Digital Library** link provided on the Dashboard screen on the left pane to launch digital library. The following screen is launched:



Figure 34.2 Digital Library



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

The following sections appear:

- Search: Allows you to search for digital assets based on either a keyword or by providing more elaborate search criteria through the advance search facility.
- Digital Vaults and Section Navigator: Allows you to navigate into vaults and sections by providing a tree like structure and searching for digital assets. It also shows the current selected vault or section.
- Tools: Displays links to various digital library tools.

Content Frame: Thumbnails of assets and collections from the current selected vault or section are displayed, assets in the cart or show assets resulted from a search.


## Organizing and Retrieving Digital Assets

### Overview

The digital library organizes digital assets in vaults and section hierarchy and is secured by security policies applied to the 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

The section navigator allows you to navigate into a vault by expanding the vault hierarchy and drill down to the required section to view the assets stored under it. Click + to expand or - to collapse the tree structure.

At the bottom of the navigator, click  icon to bring up the menu with links to perform the following operations:

- Create Section: Enables you to create sections in the current selected vault.

- **Modify Section:** Allows you to modify the current selected section. You cannot edit the vault name and description but you can edit the security policy depending on your access rights.
- **Section Information:** You can associate additional information with a section by associating facets. On the section information screen, you can edit the information in the facet field or deleted it. You can associate facets with the sections from the create section and the modify section screens.
- **Delete Section:** Enables you 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.
- **Paste From Cart:** Select from the cart content and paste into the current section. This creates a copy of the assets in the section where the assets are pasted.

*Note:* The naming convention for the files which are pasted is <Paste>\_<DateTime> for example, Paste\_20091216175324 .



- **Move Contents:** Move content of the cart into the current section. The assets are moved to the current section and deleted from the previous section.

*Note:* The naming convention for the files which are moved is <Move>\_<DateTime> for example, MOVE\_20091216175324.

- **Asset Descriptor:** Enables you to specify additional information which appears next to the assets in a list mode.

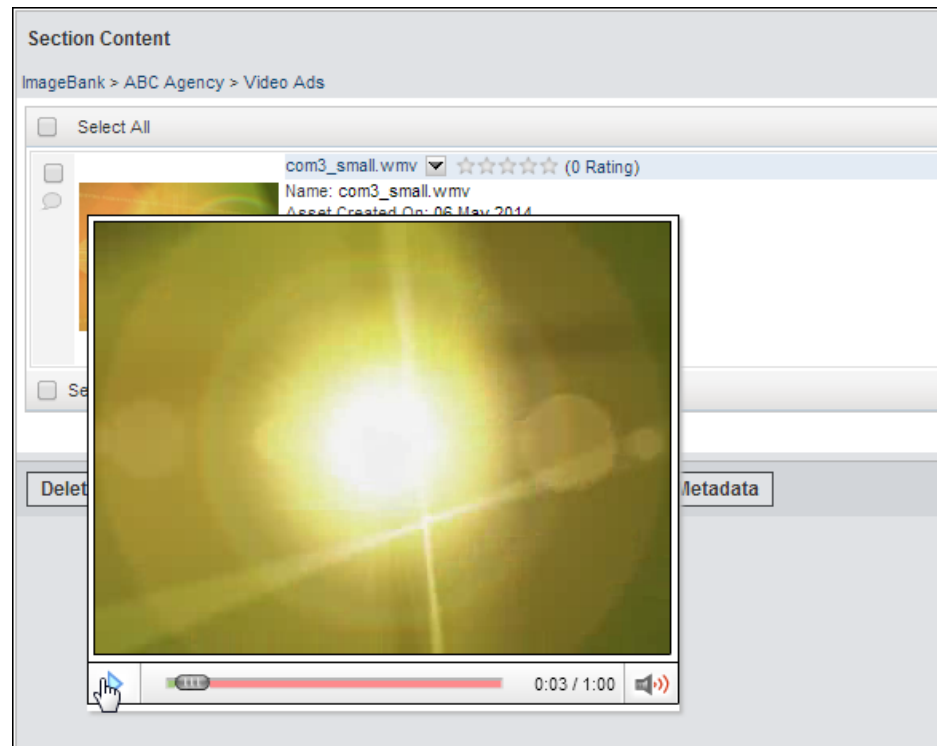
## Managing Assets

You can perform the following operations on the section content screen:

- **The Breadcrumbs:** To view assets stored under a section, click on the section name in the vault or section navigator. The breadcrumbs are displayed on the top of the section content screen. The section path for the current section appears. Each section in the breadcrumb has a link using which you can navigate to the desired section.
- **Thumbnails:** The thumbnails of all assets are displayed. On a mouse over, the preview of 300 x 300 pixels appears for all image and video files. For all the other file types a popup with a link to download the preview is shown. Click  icon next to the asset for the asset tools. Asset tools has links to view or 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  icon. Click **Remove All** to clear the contents of the cart.

In case of video files, on a mouse over a preview appears which can be played. When video files of type WMV, ASF, MOV, AVI, MPEG and audio files of the type MP3 are uploaded, previews in FLV format and thumbnails in JPEG format (excluding MP3 files) are generated automatically.

Figure 34.3 Video Preview



You can perform the following operations on the video preview screen:

1. You can play or pause the preview.
2. You can forward or rewind the video.
3. You can view the duration of the video.
4. You can control the volume.

The section content screen has two layouts – Grid and list view. Based on your preference thumbnail of each assets are displayed in a grid or list view. Click the thumbnail to download a low-resolution preview of the asset.

Select one or many assets by clicking the check box next to the assets to perform the following operations:

- Delete: You can delete the selected assets. The assets are transferred to the recycle bin.
- Download: You can download selected assets in a batch. The reason for download should be mentioned and if the terms and conditions is enforced then it needs to be accepted. Multiple assets can be selected and downloaded in the following manner:

*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. You can select original, preview or thumbnail or all renditions for an asset to be transferred via FTP. Select the FTP option and click **OK**. Select from a pre-configured list of FTP sites where the assets are transferred. Specify the e-mail addresses of individuals who need to be notified on success or failure of transfer of assets.
- Zip files: Compress the assets into a single file and download the zipped file. You can select original, preview or thumbnail or all renditions for an asset to be

compressed into a ZIP file. Select the Zip files option and click **OK**, specify the ZIP filename. To go back to the previous screen click **Back**.

- **Send Files to Folder:** This link is visible to you if the configuration setting Support Network Folder is set to yes and the administrator has specified the folder name. You 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, specify if the files should be downloaded for you also.

**Figure 34.4** Download Assets in a Batch

The screenshot shows a 'Download' window with the following sections:

- Files to be downloaded:** A table with columns for file name, version, size, and download time. Each row has a thumbnail, a 'Download' icon, and a 'Preview' icon.
 

Name	Version	File Size	Approximate Download time
149275_58803320227881_198537295_n.jpg	Version 2	109 67 KB	10secs
537685_58802203980968_274448363_n.jpg	Version 1	79 25 KB	10secs
72899_588021973229054_69909109_n.jpg	Version 1	141 48 KB	21secs
Chrysanthemum.jpg	Version 1	858 78 KB	2min 3secs
Desert.jpg	Version 2	426 11 KB	1min 58secs
Hydrangea.jpg	Version 2	581 33 KB	1min 17secs
- Total size of files to be downloaded:** 3.98 MB
- Select processing to be done on downloaded files:**
  - Include metadata as XMP in Original file.
  - FTP : Transfer files using FTP
  - Zip files : Creates a zip file
- Select destination to transfer files:**
  - Site Name: None
  - Description: [Text Field]
  - Host Name: [Text Field]
  - User Name: [Text Field]
  - Password: [Text Field]
  - Destination Directory: [Text Field]
  - Notify me by email:  On Error  On Completion
  - Buttons: [Select All] [Clear All]
  - Notify other users: [Text Field]
  - Note: Separate email addresses with comma (,) character

- **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 **Generate Catalog** on these screens. You can print the catalog.

## Advanced Asset Operations

### Asset Menu

When you click  icon next to the link or name of an asset, an individual asset menu appears. :

There are links to perform the following operations

- **Asset Information:** This displays the asset information screen
- **Download Original:** Allows downloading and viewing of the original asset. Enter the reason for download depending on the setting. While batch downloading the assets, users can choose to include the XMP information with the assets and view the files 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 is available in the file properties.

*Note:* XMP information is not inserted into the file while downloading if the original file did not have the XMP information for file formats such as PDF, MOV, MP4, AVI, and so on.


- **Download Preview:** Allows user to download the low-resolution preview of the asset.
- **Copy to Cart:** Copy the asset into the cart for further processing.
- **Delete:** Delete the asset and move it to the recycle bin.
- **Dynamic Rendering:** Allows you to render and download an asset into different image or document format for example, a JPEG as a BMP.
- **Create New Asset:** You can create a new asset from an existing asset. All the metadata from the source asset is copied except for a file binder or file browser field. An upload digital asset screen appears where you can upload the files.

### **Asset Information**

Asset information such as the asset name, description, expiry date and the user rating appears which you can edit by clicking **Edit** on the top right corner. The number of ratings for the asset is also displayed. You can upload the thumbnail and the preview. Other operations such as lock, freeze, download preview and download original can be performed. The following tabs are displayed on the asset information screen:

- **Summary:** Asset information such as asset owner, current version, downloads, and so on, are displayed.
- **Business Information:** You can attach additional information by selecting facets from a drop down list and clicking **Add**. The XMP (Extensible Metadata Platform) information is also displayed. You can search and retrieve assets using the XMP information. The Business Information forms or facet forms displayed are tracked for change management. The audit history is tracked as a part of change management when assets or versions are created, business information is added or modified, rendition of assets or sets are uploaded or XMP information is changed.

Click **View Audit History** to view the history. This link is available only if the administrator sets the change management setting to Yes. An audit history popup appears which contains a history of changes displayed in blocks. Where each block represents the date on which the 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.

Click  icon to view all the changes made for the field. Information such as when the changes were made and who made the changes are displayed. You can compare two changes by selecting the changes and clicking **Compare**.

- **Version:** You can upload a new version by clicking **Upload Version**. You can manage versions of the asset and delete the old version by clicking **Delete**. You can also update the current renditions – thumbnail, preview and the original file.
- **Comments:** You can post comments for the assets or view the posted comments. You can attach files to the comments.
- **User Rating:** You can rate and review the assets. Rate the assets using a five star rating tool and provide review comments to accompany the rating. One rating per logged in user for each asset is allowed. All digital library users can use the rating information (average rating and number of ratings) to search, filter, and sort digital asset lists. The star rating functionality is available in the Digital Library, sites built using Site Builder, Media Library and Digital Asset Finder. The ratings data is also

available for use in predefined and ad hoc reports. Click **Edit** to rate and enter a review for the asset.

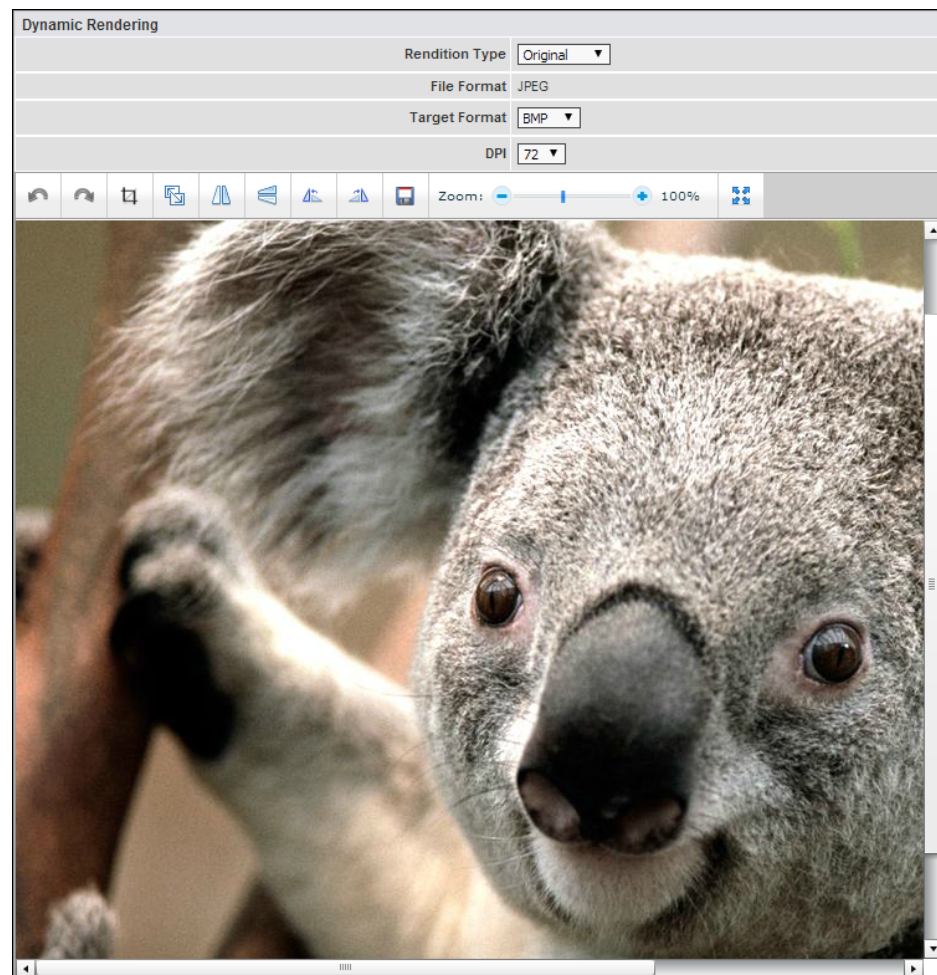
### **Dynamic Rendering**

A dynamic rendering screen appears where you can do the following operations:

- You can download the original, preview or the thumbnail in the following formats - BMP, JPEG, PCX, PICT, PSD, SGI, TIFF, PNG or TGA.
- You can select the DPI.
- You can crop, resize, flip and rotate the image.
- You can view the image in full screen.
- You can zoom the image in or out by moving the slider.

After all the changes have been made save the image by clicking **Save**. The rendered image can be saved at the location that you select. The original file is not replaced in the Digital Library.

**Figure 34.5** Dynamic Rendering





## Expired Assets

When the asset reaches its expiry date, the system marks the asset as expired. The asset appears with an expired watermark on it. The expired assets cannot be used and no operations can be performed on them. A new asset can be created from this asset. There is no preview on a mouse over and the asset information appears 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 settings are set to true.

## Linking Assets

Asset can be linked to one another. These assets can be present at different locations in the digital library but they can be logically related and linked. All links associated with an asset can be viewed from the linked asset information screen for that asset. Follow the steps below to link assets:

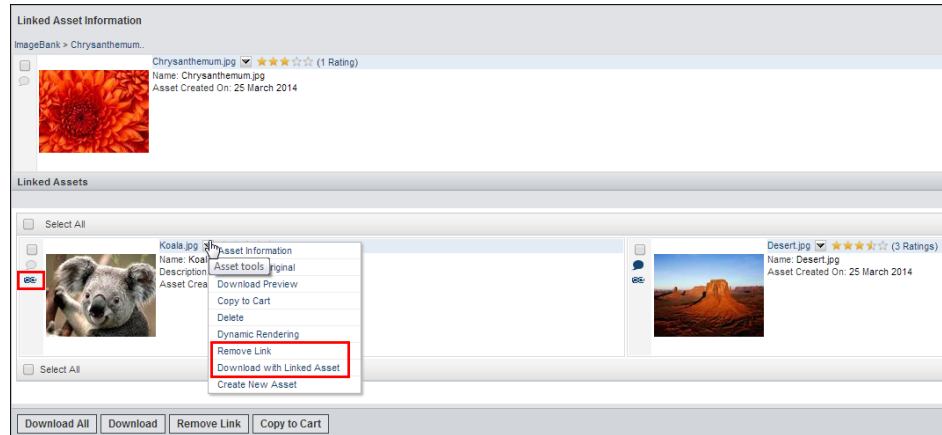
1. Copy the digital assets to be linked to the cart using the copy to cart function.
2. Select the cart by clicking  icon on the top right corner. The cart contents are displayed.
3. You can link two assets with each other in the cart by selecting both of the assets and clicking **Link Assets**. A confirmation that the assets are linked appears.
4. To link a single asset with several assets select **Mark for Linking** on the drop-down asset menu of the asset.
5. The cart contents are displayed with the Asset Marked for Linking on the top and the assets to be linked in the section below it. Select the assets to be linked with the source asset and click **Link with Marked Asset**. This will link all the selected assets with the source asset.

If the linked assets are associated, then a **Download with Link Assets** option is available in the asset menu. By selecting this option, all the assets linked with the source can be downloaded.  icon is shown only if the asset has other assets linked to it. By clicking on the icon next to the asset that you can view the assets which are linked to the selected asset. The following operations can be done on the linked asset information screen:

- Download All: You can download all the assets.
- Download: You can select and download the assets.
- Remove Link: You can remove the linking between the source and other assets.
- Copy to Cart: You can copy the selected asset to the cart.



Figure 34.6 Linked Asset Information



## Searching for Digital Assets

### Overview

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.


### Simple Search

In simple search, only the keyword need to be specified 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 the Digital library. All files that contain the keywords or phrases are displayed in the search results.

You can search for keywords or phrases in the following files formats:

- .DOC
- .XLS/.XLSX
- .PPT
- Text files : .TXT
- Hypertext files : .HTM/ .HTML

*Note:* Some limitations of .PDF documents – While generating a PDF, it can 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  icon. A search results screen appears. This screen lists all the items fulfilling the search query. You can search within the search result returned by the simple search by providing another search criteria and clicking **Search**.

*Note:*

- The count of the searched assets depends on the settings for the maximum search results in the **Settings** section in the administration section. If the searched asset count is more than the set value, then the assets after that count are not displayed. The search within search is also within those assets only.



- The search results are displayed based on the sorting preferences setup by you. If you have not setup any sorting preferences, then the system wide sorting preferences from the settings in Digital Library are used to display the sorting results.

**Simple search cases and points:**

1. Here are the list of ignored characters: ` ~ ! @ # \$ % ^ & ( ) \_ = ; ' : [ ] { } < > \ | \ " , . / ?
  - If you want to search on the above ignore set, enclose the characters in double quotation marks (“”). This is not valid for double quotation mark (“”) and \* characters.
  - Words enclosed in double quotation marks are treated as a single word, that is, “A B” means that text should contain string A B.
  - \* Character is replaced with % while forming the search filter, that is, AB\* means text should contain the string AB%

Examples of how Simple Search works:

**Table 34.1** Simple Search

Search String	Results	Comments
SAS logo	It will return all assets that have the word <i>SAS</i> as well as <i>logo</i> in either the name or description or the searchable business information fields. The order in which the words appear does not matter that is, 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 <i>SAS</i> or <i>logo</i> in either the name or description or the searchable business information fields.	
SAS and logo	It will return all assets that have the word <i>SAS</i> as well as <i>logo</i> in either the name or description or the searchable business information fields.	
SAS or logo	It will return all assets that have the word <i>SAS</i> or <i>logo</i> in either the name or description or the searchable business information fields.	

Search String	Results	Comments
"SAS logo"	It will return all assets that have the word <i>SAS logo</i> (as a string) in either the name or description or the searchable business information fields.	It works like AND. This is different from the first case of SAS logo.
"SAS + logo"	It will return only those assets that have the words <i>SAS + logo</i> in the name or description or the searchable business information fields	It searches for the plus sign in the name or description . So the result is different from that which you get when you enter SAS + logo without the quotation marks.

## 2. Points to remember:

- Space between words is treated as AND, that is, A B means text should contain A and B. Remember words enclosed in double quotation marks (“”) are treated as one word, that is, “A B” C means text contains string “A B” and C.
- + Sign between words mean OR, for example, A + B means that string contains A or B.
- - Sign before word means NOT, for example, A–B means that string contains A but not B. Here there should not be any space between – sign and the word otherwise the – sign is ignored.
- OR, AND, NOT are predefined operators.

## Document search cases and points:

1. Here are list of ignored or noisy characters: ` \* ~ ! @ # \$ % ^ & ( ) \_ = ; ' : [ ] { } < > \ | \ " , . / ?

- Above characters are ignored even if they are in double quotation marks (“”).
- Unlike simple search, document search uses prefix based word search, for example, if text is *FIFA WORLD CUP 2014* and user searches for *CUP* then no results are returned. If you search for *WORLD*, then the result are returned.
- In double quoted phrase, each word making up the phrase is considered a separate prefixed word. All rows that have words beginning with the prefix terms are returned. For example, the prefix term *light bread* find rows with the text *light breaded*, *lightly breaded*, or *light bread*, but it will not return *lightly toasted bread*. Refer to [URL](#).
- Space between words is always treated as AND, for example, *FIFA WORLD* means that the text should contain words starting with *FIFA* and *WORLD*.

## 2. Points to remember:

- +, -, OR, AND, NOT are not predefined operators and they are ignored.
- Complete list of ignored or noisy characters or word are as follows: 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | \$ | ! | @ | # | \$ | % | ^ | & | \* | ( | ) | - | \_ | + | = | [ | ] | { | } | about | after | all | also | an | and | another | any | are | as | at | be | because | been | before | being | between | both | but | by | came | can | come | could | did | do | does | each | else | for | from | get | got | has | had | he | have | her | here | him | himself | his | how | if | in | into | is | it | its | just | like | make | many | me | might | more | most |

much | must | my | never | now | of | on | only | or | other | our | out | over | re | said  
 | same | see | should | since | so | some | still | such | take | than | that | the | their |  
 them | then | there | these | they | this | those | through | to | too | under | up | use |  
 very | want | was | way | we | well | were | what | when | where | which | while |  
 who | will | with | would | you | your | a | b | c | d | e | f | g | h | i | j | k | l | m | n | o |  
 p | q | r | s | t | u | v | w | x | y | z. The above list is treated noisy only if they are  
 passed as separate words, that is, they have space before and after them.


### Advanced Search

Sometimes a single search criterion can result in the retrieval of many items that match the specified criteria. In case you need to narrow down the search further, a detailed search criteria can be specified. For this, use the advanced search option, for example, in simple search if the keyword such as *Nesnet* is specified for the brand, then all the items with the brand *Nesnet* are retrieved. In advanced search, to narrow it down, you can specify the search criteria where the brand is *Nesnet* and the asset type is *Beauty Shots*. Only those specific items, which match these combined criteria are retrieved.

Click **Advanced Search** provided on the left pane in the search section. The advanced search option appears. Specify the filters to search for the assets.

You can perform the following actions on this screen:

- **Delete:** Deletes the selected filter criteria.
- **Add Filter:** By default there are three blank rows to specify the filters. You can add new filter criteria. For each row of filter, specify information source, field or attribute of the source, operators and attribute value to search.
- **Search:** Searches for the digital assets, which fulfill the filter criteria's entered by you. A search result appears. You can view the results by clicking **Search**.

On the search result screen, you can delete, download the selected digital asset, copy the selected digital assets to cart, generate a catalog and generate the asset metadata report. For asset menu click  icon next to each digital asset. The asset tool includes a functionality to navigate to the section by clicking **Navigate to Section**.

- **Save Query:** Save the specified filter criteria list for further use by entering the query name and description.

*Note:* You can save a query with filters for the social star rating. In the future, if the feature is switched off, the filters will still be visible in the saved query.

Here are the advanced search operators:

**Table 34.2** Advanced Search Operators

Data Type	Operator
String	Equal To
	Not equal to
	Contains

Data Type	Operator
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

Data Type	Operator
DateTime	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
	Between
	Date Macros
Boolean	Equal to
Currency	Equal to
	Not equal to
	Greater than
	Greater than equal to
	Less than
	Less than equal to
Multi-Select	Contains
	Equal to
	Not equal to
Text	Equal to
	Contains

Here are the advanced search filters:

- Source: Digital Asset

**Table 34.3** Advanced Search Filters for Digital Assets

Attribute	Type	Operator	Value
Name	String	Equal To	You can search for digital asset names with all supported operators.
		Not equal to	
		Contains	
Description	String	Equal To	You can search for digital asset description with all supported operators.
		Not equal to	
		Contains	
Download Count	Download Count	Equal to	You can search for digital assets depending on how many time they have been downloaded.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Not Equal to	
Expiry Date	DateTime	Equal to	Digital assets can be searched for on the expiry date. The date can be selected from the calendar.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Between	
		Date Macros	

Attribute	Type	Operator	Value
Average Rating	Integer	Equal to	The digital assets can be searched for on the average rating.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Not Equal to	
Number of Ratings	Integer	Equal to	The digital assets can be searched for on the number of ratings.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Not Equal to	
Lock	Integer	Equal To	The locked digital assets can be searched for. The value is 1 if locked and 0 if not locked.
Freeze	Integer	Equal To	The frozen digital assets can be searched for. The value is 1 if frozen and 0 if not frozen.

Attribute	Type	Operator	Value
DateCreated	DateTime	Equal to	Digital assets can be searched for by the date created. The date can be selected from the calendar.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Between	
		Date Macros	
DateCataloged	DateTime	Equal to	Digital assets can be searched for on the date created. The date can be selected from the calendar.
		Greater than	
		Greater than equal to	
		Less than	
		Less than equal to	
		Between	
		Date Macros	

- Source: Locked By

**Table 34.4** Advanced Search Filters for Locked By

Attribute	Type	Operator	Value
Name	String	Equal To	Digital assets locked by a particular user can be searched for. The name used here is the login name.
		Not equal to	
		Contains	

- Source: Digital Asset Owner



**Table 34.5** Advanced Search Filters for Digital Asset Owner



Attribute	Type	Operator	Value
Name	String	Equal To	Digital assets owned by a particular user can be searched for. The name used here is the login name.
		Not equal to	
		Contains	

- Source: Digital assets in Section

**Table 34.6** Advanced Search Filters for Digital Asset in a Section

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

### Predefined Search Queries

Predefined search queries are saved from an advanced search. To manage the saved query, click  icon. To run a saved query, select a query from the drop down list and click  icon.

### Last Search Results

By clicking **Last Search Results**, your last search query and the results are displayed.

## Tools and Configuration


There are different ways of uploading assets:

- Interactive check in: You can upload one asset at a time.
- Batch Cataloging: If the assets are more than 1GB then it is recommended to do batch cataloging. Multiple assets can be cataloged on an FTP site.
- Cataloging from the network folder: Allows you 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 the following links:

- **Upload Digital Assets**

Enter the following information:

- **Section Path:** Specify the section where the assets should be uploaded. Select the path by clicking  icon.
- **Disk Space:** The available disk space is shown.
- **Original:** Upload the original file. This is mandatory as the system automatically generates a preview and thumbnail. Refer to [Table 34.8 on page 313](#) for information on what file formats are supported.
- **Preview:** It is not mandatory to upload the preview file. It is auto generated if not provided.
- **Thumbnail:** It is not mandatory to upload the thumbnail file. It is auto generated if not provided.
- **Expiry Date:** Specify the expiry date for the asset.
- **Description:** Enter the description for the asset.
- **Business Information:** You can provide additional business information or metadata 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 is added for Smart Assets that carry information within themselves such as copyright information, photograph information or the information about the camera on which the image was taken, and so on. 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 is stored in facet fields in the Digital Library. Users can search for assets using the XMP data.

Click **Save** to check-in the asset.

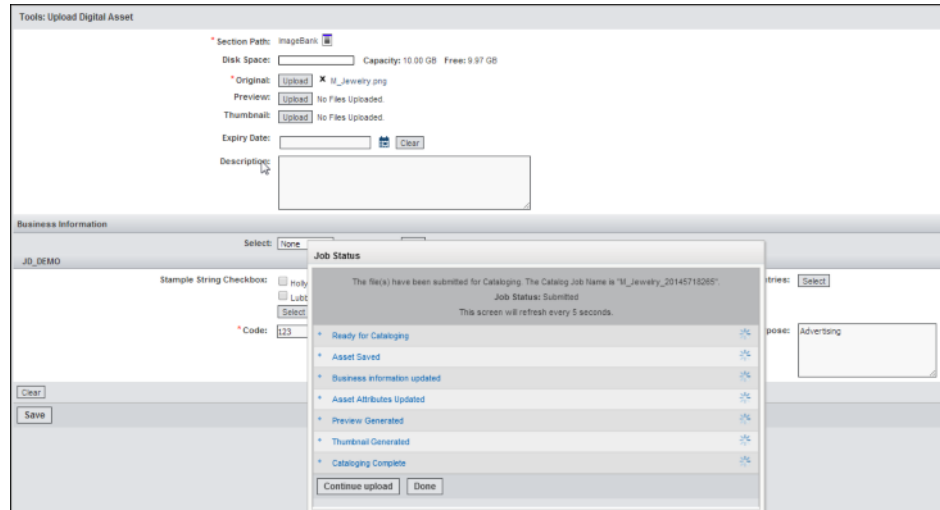
*Note:* When a user tries to catalog an asset, the system warns you if the services that ensure that the asset are cataloged in the background are not switched on.

While uploading assets remember the following points:

- Long filenames are supported but if the filename with the path exceeds 256 characters, there is an issue with the Windows OS which is not supported by SAS Marketing Operations Management.
- Two or more spaces are supported.
- All special characters are supported except the characters that the file systems do not support such as /, \, :, \*, ?, ", <, >, |.

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

Figure 34.7 Upload Digital Asset



- **Create Collection:** You can create a new collection in the current selected section. A Create Collection screen appears. Provide the collection name, description and upload a thumbnail. Click **Save** to save the new collection.
- **Preferences:** You can set up the solution behavior for yourself in the following manner:
  - Changing the layout of the content to either grid or list view. By default, the digital library solution displays the list view.
  - Allows to specify the sorting criteria for the assets to be displayed. Specify the asset attribute for sorting and the sort order whether it is ascending or descending.
  - Specify the maximum results for search.
  - Set the cataloging preferences.
- **E-mail** - E-mails can be sent out from Digital Library by providing the e-mail addresses. You can attach assets from the cart to the e-mail and post it to the sender. Depending on the configuration the e-mail can be sent to users who are not registered users of the system. If the **Inherit Sender's Right in E-mail** is set to yes, then the receiver of the e-mail can use your access right for downloading the asset. If it is set to no then the receiver cannot open the attached assets depending on the receiver's 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 Digital Library e-mails, you can choose to display additional asset information along with the asset links. This supplemental information can provide additional context for e-mail recipients. For example, the asset name, vault and section path can be added as additional information along with the list of assets in the e-mail.
- **Cataloger Job Status:** You can track the status of the cataloging by viewing the cataloger job status.

Following errors in the process of cataloging are listed:

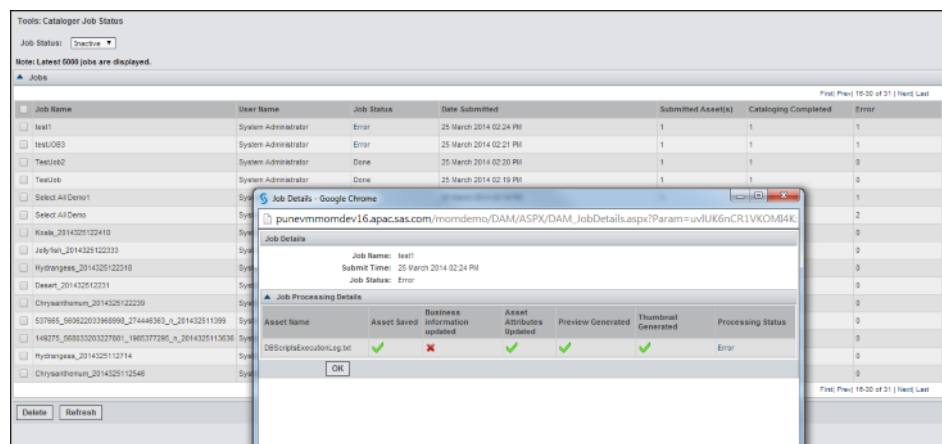
- **Asset Saved:** Whether the asset has been saved.
- **Business Information Updated:** Whether the business information is updated. This is the metadata stored in the facets attached to the asset.

- **Asset Attributes Updated:** Whether the asset attributes are updated. This is the default information provided by the system for the asset.
- **Preview or Thumbnail Generated:** Whether the preview or the thumbnail is generated for the asset.
- **Processing Status:** The status of the job.

You 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 and paste from the cart

**Figure 34.8** Cataloger Job Status



- **Checkout Job Status:** You can check the status of the following jobs or downloads:
  - Batch Download: Zip file
  - Batch Download : FTP
  - Send files to Network
- **Configure Plugin:** You can configure FTP sites for downloading assets.
- **Section Management:** A section management screen appears. Multiple sections can be added, modified or deleted. You can set the display order of the sections. 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
- **Revive Expired Assets:** The administrative group or the user who has marked the assets as expired could revive the expired assets. You can generate a catalog of the expired assets.

The following naming convention is followed while uploading or downloading an asset:

**Table 34.7** Naming Convention for Files

Interaction	Naming Convention
Single file check in	<Upload File Name>_<yyyymmddhhmmss> hat is, Date time, for example, if the uploaded filename is <i>LOGO.pdf</i> then job name is <i>LOGO_20091216175324</i> .
Batch cataloging	In this case you can specify the job name.
Cataloging using MOM Desktop	Job name is entered you.
Network folder	In this case you can specify the job name.
DAM Job Copy	In this case you can specify the job name.
Copy- Paste	PASTE_<Date Time>, for example, COPY_20091216175324
Move	MOVE_<Date Time>, for example, MOVE_20091216175324
Batch download - Zip	Compression_<Zip filename specified by user>_<Date Time>, for example, if the ZIP filename specified by you is <i>TestZip</i> then the job name is <i>Compression_TestZip_18Dec2009 122018</i> .
Batch download - FTP	FTP_<Host name for FTP>_<Date Time>, for example, if the host name (machine name or IP Address) for FTP is <i>sun</i> then the job name is <i>FTP_sun_18Dec2009 121954</i> .
Batch download – Network folder	SendFiles_<Folder name specified by user>_<Date Time>, for example, if the folder name specified by you is <i>TestNetworkFolder</i> then the job name is <i>SendFiles_TestNetworkFolder_18Dec2009 122120</i> .

**File Formats Supported by SAS Marketing Operations Management:** The following table provides general guidelines on preferred formats for the auto generation of the previews and thumbnails for various artwork originals file formats.

**Table 34.8** File Formats Supported by SAS Marketing Operations Management

Original Format	Preview Format	Thumbnail Format	Dynamic Rendition
AI	PDF	JPEG	Yes
ASF	FLV	JPEG	No

Original Format	Preview Format	Thumbnail Format	Dynamic Rendition
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 or 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

Original Format	Preview Format	Thumbnail Format	Dynamic Rendition
XLSX	XLSX	JPEG	No

*Note:*

- You can upload TXT files for which a preview or thumbnails is not generated. The TXT file uploaded in Digital Library should be saved as UTF-8 encoded on your desktop before uploading in the system.
- TIFF (LZW compressed) files are not supported.
- Only RGB files are supported. CMYK files are not supported.
- On a mouse over a preview is shown for JPG, JPEG, FLV, BMP, PNG and WPG file formats.
- 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 you with a mechanism for setting cataloging preferences, submitting jobs and viewing the status of the jobs submitted for cataloging. While cataloging, you can catalog the original file along with the preview and the thumbnail. If the preview and thumbnail are not cataloged along with the original file, SAS Marketing Operations Management Cataloger generates thumbnails and previews to enable easy viewing of items using the SAS Marketing Operations Management viewer. You can specify the hierarchical structure in which to catalog the assets in the database. The cataloger maintains the hierarchical structure while cataloging as specified.

### Getting Started

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

1. Set the cataloging preferences.
2. After the digital assets are dropped in the catalog folder that is, the Mount Point, the assets to be cataloged are 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 such as the hierarchy validation, user validation, file count validation, and so on. After all the validations are done the control goes to the Cataloger Service.
4. The cataloger is responsible for generating the preview and thumbnail:
  - If only the original file is uploaded, the preview and thumbnail are generated by the system using the original file.
  - If the original and preview files are uploaded, 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.

- If the original, preview and thumbnail files are uploaded, then appropriate files are used for preview and thumbnail.
5. In the process of generating the thumbnail and preview if the cataloger encounters any problem then the errors are logged. The errors are logged in the error folder for you to identify the problem with the file and resubmit for cataloging.

**Setting up Cataloger Preferences:** You can set or define preferences based on which the digital assets are cataloged. Click **Preferences** under the tools menu. A Cataloging Preferences screen appears. You can set preferences for cataloging a job in the following manner:

- You can change the set of preferences for each job or can always use the same set of preferences for cataloging of job.
- You can get details about the status of the job through the E-Mail notification option. Specify the e-mail address for receiving the notification on various events.
- SAS Marketing Operations Management cataloger provides you with the option to indicate the preferences for thumbnail and preview generation. Specify details such as the height, width, depth and the DPI for preview and thumbnail generation.

Click **Save**.

## Preparing and Submitting a Job

### Preparing Folders

First organize the data in a particular format. The hierarchy of the digital asset folders is as follows:

```
Mount Point
- <Login Name>
  -Job Name
    - Originals (Folder)
    - Previews (Optional Folder)
    - Thumbnails (Optional Folder)
    - AssetInfo (File)
```

- Create a folder, with the cataloging job name below the mount point under the user name folder. Create the original, preview and thumbnail folders under that folder.
- The original files for cataloging need to be present in the originals folder. The original folder is mandatory but the preview and thumbnail folders are optional.
- If you want 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 in the example below:
  - 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:

- If the filename with path exceeds 256 characters there is an issue with Windows OS. SAS Marketing Operations Management does not support it.



- Two or more spaces are supported.
- All special characters are supported except the characters that the file systems themselves do not support such as /, \, :, \*, ?, ", <, >, |.
- The files should be given appropriate extensions.

*Note:* Refer to [Table 34.8 on page 313](#) for information on what file formats are supported.

### **Creating AssetInfo File**

AssetInfo file contains information related to the files to be cataloged. AssetInfo file is generated by an excel macro. Three excel files are provided for batch cataloging. These files are present in the <Installation folder>\Binaries folder on the machine where SAS Marketing Operations Management is installed, in case of a single machine installation. On the application server in case of a multi-machine installation. Two are for the windows platform and one is for the Macintosh platform. They are as follows:

- Template\_AIMacro\_WDLG\_WIN.xls: This template file is for a windows platform. It prompts you for the location of the AssetInfo file and is saved. Running of Macros generates the AssetInfo file under the location mentioned in the template worksheet.
- Template\_AIMacro\_WODLG\_WIN.xls: This template file is for a windows platform. It does not prompt the location of the AssetInfo file instead allows you 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 you in the template worksheet.

For the Macintosh machines the templates do not prompt the location of the AssetInfo instead allows you 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 you 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 Macintosh users to batch catalog assets into the Digital Library using Excel 2008. The batch cataloging process requires certain Visual Basic macros to run on the excel sheet to generate the AssetInfo file before the cataloging begins. Since Excel 2008 does not support Visual Basic macros, it is required to convert the macros to Apple script. The Macintosh users can use Excel 2008 to generate the AssetInfo file that is used for batch cataloging. Windows users can use Excel 2000, 2003, 2007, 2010 or 2013.

*Note:* Excel 2007 users will have to save the excel sheet in 97-2003(.xls) 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 required for each asset.

The first three columns of the excel sheet should be filled in for the cataloger to pick up the files and locate them in the proper section.

The excel sheet has the following column headings:

- **Target Section:** Enter the path of the file where it is located in the hierarchy once it is cataloged, for example, Marketing Collateral\Production\BROKER DEALER.
- **Filename:** Enter the names of the files present in the originals folder.
- **Table Name:** The metadata table which 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 even one file is missing in either folders, the cataloging is canceled.
  - 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 the earlier chapter.
  - Verify that target section, filename and metadata table are right. 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 filename as mentioned in the first worksheet. The table name and the metadata fields are different in this worksheet. The program checks the combination of the target section and the filename and associates multiple facets to one asset.

Follow the steps below to generate the Assetinfo file:

- Click **Tools** from the menu bar and select macros.
- Click **Macros**. The macro dialog box appears.
- Click **Run**. A Save as dialog box appears. Save the AssetInfo file at the 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 an FTP site hosting the SAS Marketing Operations Management application.

### **Monitoring a Job**

**Active Jobs:** After submitting the job for cataloging, check the status of the job in the active jobs screen or the inactive jobs screen. Traverse the link and click **Cataloger Job Status** under **Tools** on the left pane of the Digital Library solution. A Cataloger Job Status screen appears. Active jobs screen allows you to view job-related details. Active jobs are those jobs, which have the status such as new job, released or in-progress.

Details such as job name, name of the user who has submitted the job, job status and the date on which the job was submitted are displayed. You can cancel the jobs having the status released which means that the processing of that job will not proceed further.

**Inactive Jobs:** Inactive jobs are those jobs, which have the status done, canceled or error. The details shown for the jobs are same as that of active jobs. You can traverse the error URL for jobs having status as error for viewing the error details.

### **Viewing Cataloging Errors**

The errors occurred during the process of cataloging can be viewed on the job errors screen.

The details shown on this screen are as follows:

- Job Name: The name of the job having errors.
- User Name: The name of the user who has submitted the job for cataloging
- Time Submitted: The time at which the job was submitted.
- Filename: 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 the cataloging failed are moved to the error folder on the NTFS. The error folder is present under the following hierarchy: Mount Point - User Name - Errors

The hierarchy of the job name and the originals is maintained inside the errors folder so that You can rectify the error and resubmit the job for cataloging.

### **Deleting Old Jobs**

The inactive jobs screen shows all the inactive jobs having the status done, canceled or error. You can select the check boxes of the jobs for deletion and click **Delete Jobs**. All the selected jobs are 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 file. The following cases explain how various formats should be handled:

#### **Case 1:**

Vector Graphics created in Illustrator, Quark, and so on. related to packaging graphics (Artwork Mechanicals), promotional brochures, and so on:

- Create a job folder with two sub folders originals and previews
- Create PDF of the artwork for the preview.
- Compress the artwork mechanical with linked images using Stuff-It (.sit format), for example, *Art1.eps.sit*.
- Rename the PDF created in the previous step using the naming convention described above.
- Move the Stuff-It file into the originals folder
- Move the PDF file into the previews folder.
- Fill in the Excel worksheet with the required information and move it under the job folder.
- Transmit the job folder either by FTP or on CDs or DVDs.

#### **Case 2:**

Raster graphics in EPS format created in Photoshop (or other tools) for Product Photos, Logos, and so on.

- Create a job folder with two sub folders originals and 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 the previous step using the naming convention described above.
- Move the Stuff-It file into the originals folder.
- Move the PDF file into the previews folder.
- Fill in the Excel worksheet with the required information and move it under the job folder.
- Transmit the job folder either by FTP or on CDs or DVDs.

**Case 3:**

Raster graphics in JPEG, TIFF, and so on, for product photos, beauty shots, high-resolution graphics, logos, and so on.

- Create a job folder with two sub folders originals and previews
- Create low-resolution 72 dpi JPEG of the artwork for preview.
- Rename the JPEG created in the previous step 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 with the required information and move it under the job folder.
- Transmit the job folder either by FTP or on CDs or DVDs.

**Case 4:**

Digital videos prepared for TV advertisements, and so on.

- 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 150x150 pixel.
- Rename the JPEG created in the previous step using the naming convention described above, for example, Ad1.mov.jpg.
- Move the video file into the originals folder.
- Move the JPEG file into the thumbnails folder.
- Fill in the Excel worksheet with the required information and move it under the job folder
- Transmit the job folder either by FTP or on CDs or DVDs.

**Case 5:**

Microsoft Word, Excel or other Office documents prepared for product information, and so on.

- Create a job folder with only the originals sub folder.
- Move Office documents into the originals folder.
- Fill in the Excel worksheet with the required information and move it under the job folder.
- Transmit the job folder either by FTP or on CDs or DVDs.

## Troubleshooting

Here are some of the errors that users might encounter while cataloging digital assets. The steps that can be taken to eliminate the errors are also mentioned below:

- **FileCount Not Found In AssetInfo File:** This error is encountered when the FileCount tag in AssetInfo is missing. This error can also occur if the end tag for FileCount is not given. Checks for filecount tag in the AssetInfo file and the end tag for file count. If either of them is not present put the tag and submit the file for cataloging.
- **Failed to catalog assets because asset is frozen:** If an asset is frozen then trying to catalog the same asset gives this error. Unfreeze the asset.
- **User does not have Create permission for the selected section:** If you do not have the privileges to create an asset and you try to catalog, then this error is logged. You should have the privileges to create an asset.
- **Unable to create target section:** Specify the target section in the AssetInfo file. If the target section does not exist, then the cataloger attempts to create one for you. If the target section cannot be created or if you do not have rights to access the section where the asset is being uploaded, then this error is logged. The target section specified in the AssetInfo file needs to be present before cataloging an asset. If the vault is not present, create the vault and submit the job for cataloging. Also, ensure that you have rights to access that vault or 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 that is 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, if not create the user in the system.
- **Number of files specified by the file count in the AssetInfo not arrived in time:** If the number of files in the originals folder is less than the number of files specified in the AssetInfo file then the cataloger waits for a specific time for the files to arrive. If the files do not arrive in the specified time, then this error is logged. Transfer the remaining files in the originals folder before the specified time elapses. 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. Ten attempts are made to open the file. If after ten 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 size of the file, which is being cataloged, is more than the available disk space, then this error is logged. Contact the system administrator to ensure that 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 a Network Folder**

This feature allows you to upload digital assets from your machine into a network drive folder. Each user has a folder with the user login name. Under the login name folder there is separate area or folder for uploads and downloads. The upload folder is monitored by the application for arrival of a job. When a job is dropped for cataloging, it will automatically pick up the job and catalog it into the system.

The following are the prerequisites for checking in files from the network folder:

- In the **DAM Settings** under **Settings**. Refer to the Digital Library Administration user guide if Support Network folder is set to yes and the network folder path is created and specified.
- Under the network folder specified above, your folder with your login name 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 should be followed. The job folder should contain the original, preview and the thumbnail folders with the Assetinfo file.

### **Batch Cataloging Using MOM Desktop**

#### **Product Information**

MOM Desktop is an extended part of the SAS Marketing Operations Management solution, which is built on the AIR platform from Adobe. The MOM Desktop has a batch cataloging module (default), which helps catalog digital assets in a bulk into the Digital Library and associate metadata or business information to it.

#### **File Sharing:**

- Connects to the Cataloger Server to transfer files selected by you to catalog in the Digital Library.
- Connects to the Solutions 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.
- On the end-user machine Adobe AIR 13.0 needs to be installed before installing MOM Desktop.
- Minimum 5MB free disk space.

#### **Installing MOM Desktop**

On any screen of SAS Marketing Operations Management click the SAS logo on the top right corner. A popup appears from where the MOM Desktop can be installed.

Figure 34.9 Install MOM Desktop



To install the MOM Desktop click **Install MOM Desktop** and click **Yes**. If an installation is already present on your machine, then the **Upgrade MOM Desktop** will appear with the version installed and the available version. If the installation on your machine and the server version is the same, then **Launch MOM Desktop** is available. When upgrading, the MOM Desktop appears with details such as the installed version and the version to be installed. By clicking **More Options** two more buttons are displayed. **Uninstall** removes the application from your machine and **Run Now** runs the version already installed on your machine.

After the installation is complete, enter the preference details such as login, password, server, tenant and save the preferences. Your preferences for cataloging using the desktop application can now be cached.

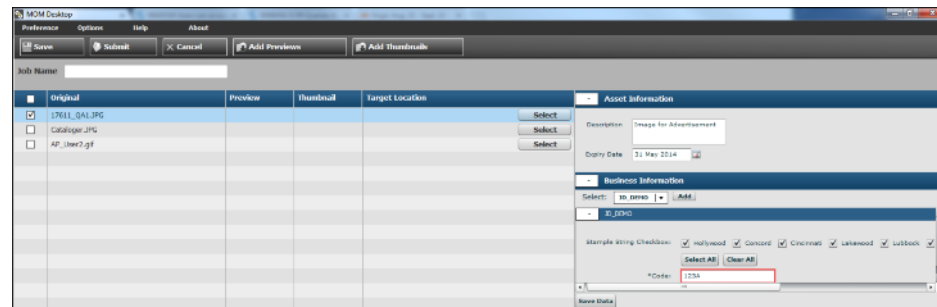
Enter the Hot Folder details. Hot folder is the location from where the files are picked up for cataloging from your local machine. Save the preferences. After saving the preferences a **MOM Desktop** screen appears. You can perform the following operations on this screen:

- Preferences: You can edit the preferences. You can change the preferences depending on the server that you are using.
- Options: You can reset all the data to start from scratch and select the language.
- Help: An HTML help file is available on how to use the SAS Desktop.
- About: Displays the version number of SAS Desktop that you are using currently.
- Delete: You can delete the selected job.
- New Job: You can create a new job.
- Resync: Any newly created sections and facets in Digital Library are reflected on the Desktop.
- Refresh: Refreshes the screen.

### Creating New Jobs

Click **New Job** and upload the original, preview and thumbnail files by dragging and dropping in the designated area.

**Figure 34.10** Creating a New Job



Multiple original files can be dragged and dropped. By clicking **Add Preview** and **Add Thumbnail**, you can select and drop multiple files for the previews and the thumbnails. The previews and thumbnails should have the same name as the original filename with the extension for the preview and the thumbnail. These files are associated with the original files automatically, for example, if the original filename is Image.jpeg then the preview is Image.jpeg.pdf and thumbnail is Image.jpeg.jpeg. Select the target location by clicking **Select**. A popup with the existing sections appear. Select from the existing sections or create a new section by selecting an existing vault or section and clicking **Create Section**. Enter the section name and click **Done**.

You can select facets or facet series for an asset. Save the selected facets or facet series by clicking **Save Data**. Enter the expiry date for the asset. After all the files are dropped save the job for later use by clicking **Save** or submit the job for cataloging by clicking **Submit**. The jobs submitted for cataloging from the desktop application reflects the status of cataloging in sync with the cataloger job status screen in the Digital Library application. The job list displays whether the job is released, in progress, done, canceled or in error state as the cataloging proceeds.

### Frequently Asked Questions

Does MOM Desktop download or pass any information from your laptop to the outside world without informing you. Does it runs any service or routine in the background on your machine which might affect their confidential data store on the network? There is no service running in the background. The application remains passive on your machine until it is opened by you. The application invokes the SAS Marketing Operations Management server only when you drags and drops assets and requests for cataloging to be done. It does not use or pull out any system information. Drag and drop the bassets 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 automatically downloads the update. You are asked whether the update needs to be installed. If you choose to do so, the latest version of the desktop application is installed on your machine.

## Reports

The reports display a list of activities by users on digital assets and related entities such as sections, vaults, and so on. To launch the reports click **Report** on the Dashboard screen under Marketing Operations Management (MOM). Lists of existing reports for Strategic Planner are displayed by default. Click **Digital Library** link on the left pane to launch the digital library activity reports.



Click on each report, add filters and generate the reports. Once the report is generated user can export the report in PDF or Excel.



## Chapter 35

# Managing Claims

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## Claims Management

Claims Management system empowers Regulatory Departments in Marketing Organizations to create a common, active, up-to-date Regulatory Claims Database (RCD) information system for all label claims. The Regulatory Department is enabled to 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:

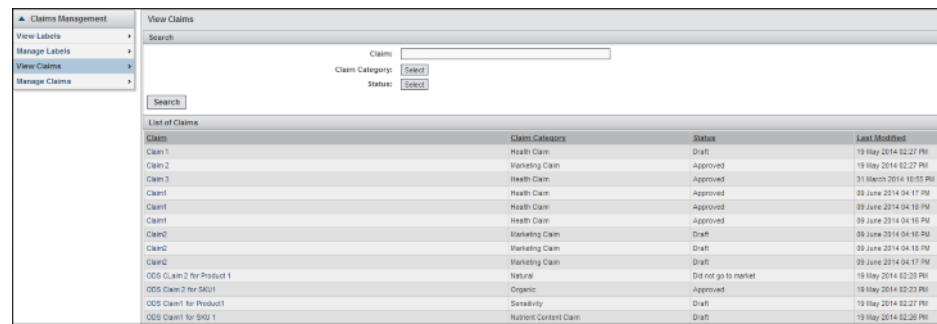
- Creates an easy searchable method for determining what claims are currently in the market.
  - Creates consistency across all brands, by creating more label-development visibility between the divisions.
  - Allows for the ability to historically track a Stock Keeping Unit product label claim change through time.
- 

## Claims

### *View Claims*

If the Enable Claims setting is set to Yes and if you have access to claims, then the View Claims screen appears.

Click **View Claims** link on the left pane, a View Claims screen appears.

**Figure 35.1** View Claims


Claim	Claim Category	Status	Last Modified
Claim 1	Health Claim	Draft	19 May 2014 02:27 PM
Claim 2	Marketing Claim	Approved	19 May 2014 02:27 PM
Claim 3	Health Claim	Approved	31 March 2014 10:55 PM
Client	Health Claim	Approved	09 June 2014 04:17 PM
Client	Health Claim	Approved	09 June 2014 04:18 PM
Client	Health Claim	Approved	09 June 2014 04:18 PM
Client	Marketing Claim	Draft	09 June 2014 04:18 PM
Client	Marketing Claim	Draft	09 June 2014 04:18 PM
Client	Marketing Claim	Draft	09 June 2014 04:18 PM
ODS Claim 2 for Product 1	Marketing Claim	Draft	09 June 2014 04:18 PM
ODS Claim 2 for SKU1	Nature	Did not go to market	19 May 2014 02:28 PM
ODS Claim1 for Product1	Organic	Approved	19 May 2014 02:28 PM
ODS Claim1 for SKU1	Sensibility	Draft	19 May 2014 02:27 PM
ODS Claim1 for SKU 1	Nutrient Content Claim	Draft	19 May 2014 02:28 PM

A list of claims present in the system appears. You can search for a specific claim by entering the criteria and clicking **Search**

Click the claim name link on the list screen to view the claim details. A View Claims screen appears with the claim information and the references attached to the claim in the Information tab. You can perform the following operations on this screen:

- If you make any changes to the claim details the system stores the changes in the audit log. To view these logs click **View Audit History** link.
- You can e-mail the claim details by clicking **E-mail**. You can send the e-mail to a user of the system as well as non-system users.
- The references linked to the claim are displayed. You can download the original version of the asset as well as the preview. You can view the asset information.
- You can go back to the label list screen by clicking **Back to List Screen**.

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 **Manage Claims** link on the left pane. A Manage Claims screen appears. You can search for claims and the claims created are listed out and displayed.

Create new claims by clicking **Create Claim**. A Manage Claims screen appears. Enter details such as claim, claim text, claim disclosure statement, claim category, claim approved on last modified (date the claim was approved), the status (draft, approved, did not go to market and obsolete), regulations and legal opinion. Enter the reason why a claim is not approved. Add references from the Digital Library or upload them from outside the system.

Figure 35.2 Create Claim

The screenshot shows the 'Manage Claims' interface. The 'Information' tab is selected, displaying the following fields:

- Claim:** Growth, Maintenance and Reprod.
- Claim Text:** A boost of other protein. Promotes healthy growth, maintenance and reproduction.
- Claim Approved on:** 01 June 2014
- Claim Status:** Approved
- Claim Disclosure statement:** (Empty text area)
- Claim Category:** Natural
- Individual's Name that input the Claim:** John Lewis
- Regulations and/or Legal opinion:** (Empty text area)
- If the Claim not approved, Reason why claim not approved:** (Empty text area)

Below the 'Information' tab is the 'Sub Form Section' with the following fields:

- String Text:** (Empty text input)
- Country:** US
- Integer Value:** (Empty text input)
- Status:** Draft, In-Progress, Import In-Progress

At the bottom is the 'References' section, which includes a table of assets and buttons for 'Upload', 'Select From Digital Library', 'Remove', 'Save', and 'Cancel'.

After entering all the details, save the claim by clicking **Save**. A Manage Claims screen with the claim details in the Information tab appears in a read-only format.

To edit or modify the claim details click **Edit**. You can e-mail the claim details by clicking **E-mail**. You can send the e-mail to a user of the system as well as non-system users.

If you make any changes to the claim details the system stores the changes in the audit log. To view these logs click **View Audit History** link.

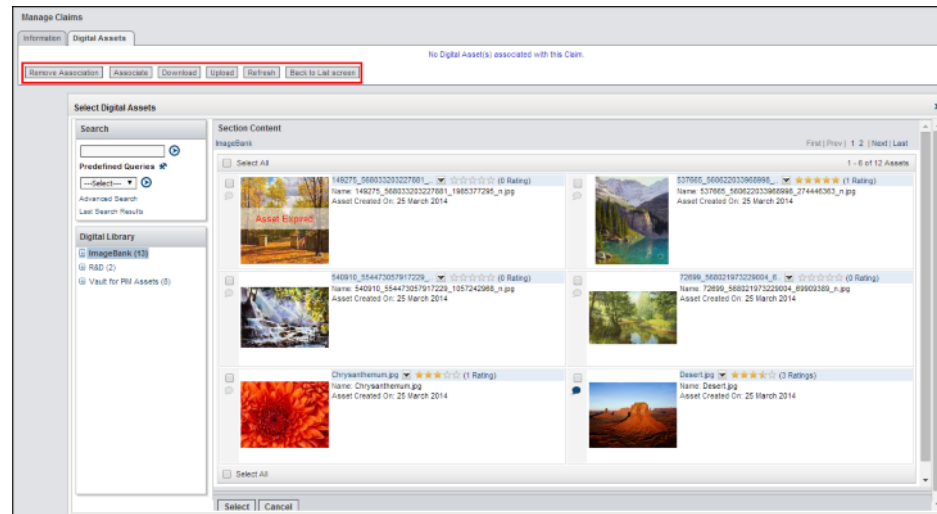
You can associate digital assets to claims.

Go to the Digital Assets tab on the Manage Claims screen to associate the claim with assets from the Digital Library.

You can perform the following actions in the Digital Library tab:

- **Remove Association:** You can remove the association between the asset and the claim by selecting the asset and clicking **Remove Association**.
- **Associate Digital Asset:** Associate assets to the claim by clicking **Associate Digital Asset**. A Select Digital Assets popup appears, where you can select the assets to associate to a claim. Select the assets and click **Select**.
- **Download:** You can select and download digital assets.
- **Upload:** You can upload new assets in the Digital Library by clicking **Upload**. An Upload Digital Asset popup appears. You can select the section to upload the asset. Uploading the original version of the asset is mandatory. You can upload the preview and thumbnail else it is generated automatically by the system. Enter the expiry date, description and select the business information to be attached from the drop down box and click **Add**. Click **Save** to upload the asset.
- **Refresh:** Refreshes the screen.
- **Back to the List Screen:** Takes you back to the View Claims list screen.

Figure 35.3 Associate Digital Assets



*Note:* You can download or upload assets depending on the access rights that you have on the assets and the section in the Digital Library.

## Labels

### View Labels

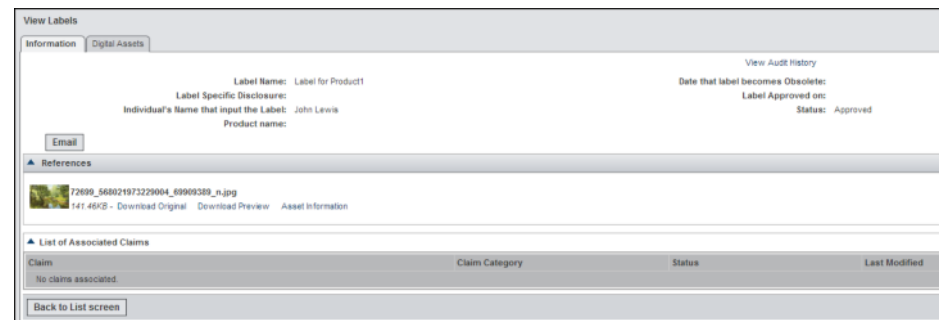
If the Enable Labels setting is set to Yes and if you have access to labels, then by default the View Labels screen appears.

A list of labels created in the system are displayed. You can search for a specific label by entering the criteria and clicking **Search**.

Click the label name link on the list screen to view the label details. A View Labels screen appears with the label information, the references attached to the label and the associated claims in the Information tab.

You can perform the following operations on this screen:

- You can e-mail the label details by clicking **E-mail**. You can send the e-mail to a user of the system as well as non-system users.
- If you make any changes to the label details the system stores the changes in the audit log. To view these logs click **View Audit History** link.
- The references linked to the label are displayed. You can download the original version of the asset as well as the preview. You can view the asset information.
- You can view the claims linked to the label by clicking the claim name link.
- You can go back to the label list screen by clicking **Back to List Screen**.

**Figure 35.4** View Labels

To view the digital assets linked to the label, go to the Digital Assets tab.

## Manage Labels

If the Enable Labels setting is set to Yes, then the labels link is in the Claims Management on the left pane.

To create new labels click **Manage Labels** link on the left pane. A Manage Labels screen appears, which has a search facility available. The labels created are listed out and displayed. Click **Create Label**.

A Manage Labels screen appears. Enter details such as label name, label specific disclosure, product name, date the label is obsolete (the label expiry), label approved on (the approval date of the label) and the status (draft, approved, did not go to market and obsolete). Add references from the Digital Library or upload them.

After entering all the details, save the label by clicking **Save**. A Manage Labels screen with the label details and the associated claims in the Information tab appears in a read-only format.

You can edit or modify the label can by clicking **Edit**. E-mail the label details by clicking **E-mail**. You can send the e-mail to a user of the system as well as non-system users.

If you make any changes to the label details the system stores the changes in the audit log. To view these logs click **View Audit History** link

You can associate claims to labels by clicking **Associate Claims**. A View Claims popup appears.

You can associate multiple claims to a single label. You can associate labels 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.

You can perform the following actions in the Digital Assets tab:

- **Remove Association:** You can remove the association between the asset and the label by selecting the asset and clicking **Remove Association**.
- **Associate Digital Asset:** You can associate assets to the label by clicking **Associate Digital Asset**. A Select Digital Assets popup appears from where you can select the assets to associate to the label. Select the assets and click **Select**.
- **Download:** You can select and download digital assets.
- **Upload:** You can upload new assets by clicking **Upload**. An Upload Digital Asset popup appears. Select the section to upload the asset. Upload the original version of

the asset which is mandatory. You can upload the preview and thumbnail or it is generated automatically by the system. Enter the expiry date, description and select the business information to attach from the drop down box and click **Add**. Click **Save** to upload the asset.

- **Refresh:** You can refresh the screen.
- **Back to the List Screen:** You can go back to the View Labels list screen.

*Note:* You can download or upload assets depending on which access rights you have on the assets and the section in the Digital Library.

View the labels which are created and associated with claims and digital assets by going to the View Labels link on the left pane.

---

## Claims and Labels in Digital Library

If the following settings are set to Yes, then two tabs are visible in the Asset Information of an asset in the Digital Library.

These tabs display the label and claim details associated with the Digital Asset.

- Claims
- Labels
- Show Claims Tab in Digital Library
- Show Labels Tab in Digital Library

*Note:* You can import claims and label information into the system using the Import Data Utility.



## Chapter 36

# Using Site Builder

---

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## 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 websites, 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 or components such as rich or formatted text, images, and so on, which makes up for the content of the page.

---

## Roles in Site Builder

The following are the user roles in Site Builder:

- **Owner:** User who creates the site.

- **Authors:** Users who are authorized to edit the site.
- **Allowed users:** Users who have access to view the site.
- **Allowed groups:** User groups who have access to view the site.
- **Site Reviewers:** Reviewers are the users or groups added by the site creator for reviewing the site before publishing it. They have a Read-Only access on the site content.

---

## Getting Started

After logging on click **Site Builder** link in the left pane on the Dashboard screen launch the Site Builder solution. The following screen is launched.

**Figure 36.1** Site List

Sites	Updated On	Published	
dsSite <small>* This site is locked by System Administrator at 27 May 2014 04:00 PM</small>	27 May 2014 04:00 PM	Yes	View   Edit   Unlock
test	10 April 2013 05:11 PM	Yes	View
ISSO_user2	11 April 2013 10:08 AM	No	View
ISSO_user3	27 May 2014 11:08 AM	No	View
ISSO_user4	11 April 2013 11:03 AM	No	View
ISSO_user5	11 April 2013 11:05 AM	No	View
ISSO_user6	11 April 2013 11:05 AM	No	View
ISSO_user7	11 April 2013 11:05 AM	No	View
ISSO_user8	11 April 2013 11:06 AM	No	View
ISSO_user9	11 April 2013 11:06 AM	No	View

The left pane has the following links:

- **Sites:** Displays the existing sites. Click **Create** to create new sites.
- **Review Sites:** Displays a list of sites that need to be reviewed.

---

## Managing Sites

### Overview

When the user logs on to the Site Builder application, the existing sites are displayed by default. To view the site, click **View**. Click **Edit** to edit the site details as well as create pages for the site.

Only the authors or the owners of the site can see the **Edit** link. When the author or the owner edits the site, the site is locked automatically and no other user can edit the site. If the site is locked, a message appears in the site description column specifying the name of the user who is editing the site.

The site is automatically unlocked if the user clicks **Done**, else it remains locked. Only the user who has locked the site can unlock the site by clicking **Unlock**.

## Creating New Sites

Click **Create** at the bottom of the Site List screen. A Site Configuration screen appears.

The following sections are present on this screen:

- **Name:** Name of the site.
- **Description:** Description for the site.
- **Login required:** Specify if a login is required for a user to view the site. If you select No, then enter the user credentials for anonymous login to the site. Check the access privileges for the user before publishing the site.
- **Publish:** Select whether to publish the site. The site is available to other users only if it is published.
- **Owner:** Owner is the user who creates the site.
- **Authors:** Click **Add User** to add authors.
- **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 client's look and feel through the `AIStyleSheet.css`, which the user can download. You can change this style sheet based on the requirements of the site and upload it. To upload, click **Browse** and then click **Upload**.
- **Upload Supporting Images:** Click **Upload** to upload the images referenced by the style sheet.
- **Footer:** Click the check box and enter the text to apply a footer for the site. You can align the text.
- **Dashboard Channel Configuration for Site:** Browse and then click **Upload** to upload the logo to be displayed on the site.

To save the new site, click **Save**.

When the site is created and saved, a screen with the default Home page for the site appears. You can configure the layout for the default page using instructions specified in [“Configuring Page Layout” on page 337](#).

Figure 36.2 Site Configuration

The screenshot shows the 'Site Configuration' interface. At the top, there's a 'Name' field with 'Brand Guidelines' and a 'Description' field with 'How to manage a Brand'. Below that, 'Login required' is set to 'Yes'. The 'Publish' checkbox is checked, and the 'Owner' is listed as 'John Lewis'. An 'Authors' section contains a table with one entry: Alex Barton. There are sections for 'Upload Style Sheet' and 'Supporting Images', both currently empty. At the bottom, there's a 'Footer' checkbox and a 'Dashboard Channel Configuration for Site' section with a logo upload field. 'Save', 'Cancel', and 'Review Site' buttons are at the very bottom.

## Editing Sites

To edit the site details, click **Edit** on the Site Details screen. Click **Configure Topbar** to configure the top bar for the site. A Configure Topbar popup appears. Specify the height for the topbar and you can upload the associated documents as images or HTML.

*Note:* While configuring the topbar, do not upload any HTML files containing `<script>`, `<applet>` and JavaScript tags.

Figure 36.3 Configure Topbar


The screenshot shows the 'Configure Topbar' popup. It has two radio buttons for 'Specify Height for Topbar': 'Default Height' (selected) and 'Change Height to' followed by an empty text box and '(pixels)'. Below is an 'Associated Documents' section with a table that says 'No documents present.'. There are two tabs: 'Upload as Image' (selected) and 'Upload as HTML'. Under 'Upload as Image', there's a 'Select Image:' label, a 'Choose File' button, and 'No file chosen' text. An 'Upload' button is also present. At the bottom are 'Save' and 'Cancel' buttons.

---

## Managing Pages

### Creating New Pages

The Site Details screen lists all the pages created for the site.

To create new pages, enter the page name and click **Create Page**. The Page List is updated with the new page. Click the Page Name link to add contents to the page. Click the configure page  icon adjoining the page name to enter the page details as follows:


- **Name:** Enter the name of the page.
- **Description:** Enter the page description.
- **Publish:** Select whether to publish the page.
- **Default:** Select whether to set this page as the default page.
- **Allowed users:** Select whether all the users can view this page or only selected users can view this page. To add new users, click **Add User**. To delete the selected users, click **Delete**.
- **Denied users:** Select the users who are denied access to this page by clicking **Add User**.
- **Allowed groups:** Click **Add Group** to select the groups who have access to this page. To delete the selected groups, click **Delete**.
- **Denied groups:** To select the groups who are denied access to this page, click **Add Group**.

To save the new page, click **Save**.

### Configuring Page Layout



To configure the page click the name link on the Site Details screen. You can configure the page hierarchy and add content to the page.

You can perform the following operations:

- **Page Hierarchy:** Click  icon to add the page hierarchy element. A Page Hierarchy Configuration pop-up appears. Enter the title. Select the URL, this is the link to the content the page displays. Enter the URL for external link. Select the target, that is select whether the contents should display in the same window or a new window. Enter the tooltip.
- **Add Content:** To add contents to the page, click **Add Contents**. An Add Contents pop-up appears. Selecting the type of content from the Content Control list box.

The types of contents in the Content Control list are as follows:

- **Rich Text Box:** Allows entering of formatted text. The user can set the fonts, size, and other formatting options.
- **Image:** Allows uploading of images.
- **Tab Strip:** Allows configuring tabs within the pages.
- **Document Template:** Allows adding documents such as HTML, PDF, and so on.

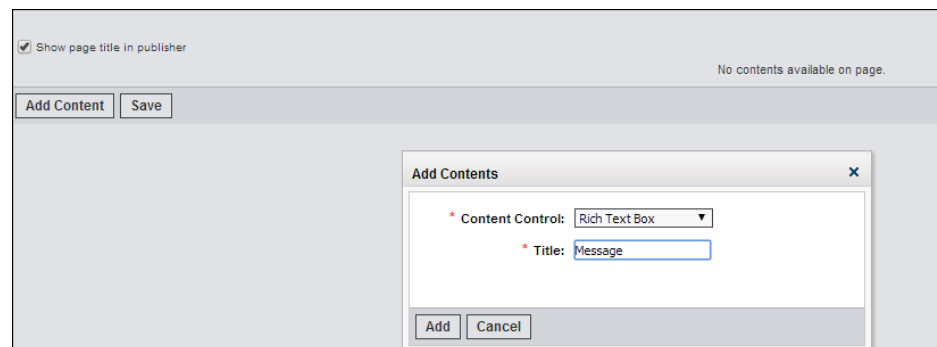
- **Online Discussion:** Allows the user to set up a discussion topic on the page.
- **Digital Asset Query:** Allows adding of a digital asset query, which displays assets on the page fulfilling the query.
- **Digital Asset Finder:** Allows the user to add a pre-configured Digital Asset Finder (DAF) on the page. The DAF allows the end user to search and download assets by forming a query.
- **Linked assets:** The user can collect assets in the cart in the Digital Library solution. You can add these assets to the page from the cart.
- : Configure the contents by clicking on this icon. Refer to “Adding Contents to the Page” on page 338 add different types of content.
- : Click the icon to view the preview of the page.

## Adding Contents to the Page

### Overview


Site Builder provides several controls (Page Elements), which you can embed on the page. To add the controls, click **Add Content**. Select the controls from the drop-down list. Enter the title for the content and click **Add**. Each newly added control forms a section on the page. These sections can be ordered by the drag and drop feature. Each section has a configure and a delete icon. Here is a brief description for configuring each of these controls.

**Figure 36.4** Add Content




### Rich Text Box


Enter text for the Page. Formatting options such as bold, italics, changing the font, is available. Besides these, there are other advanced features such as bulleting and numbering text, paragraph indentation, and so on.

To configure a Rich Text Box, add the control to the page and click  icon. Enter text and click **Save**.

### Image

This allows the user to add an image to the page. To configure the image, add the control to the page and click  icon. This displays a popup where the user can upload the image by browsing the file system and selecting the image. You can align the image and apply a border. Click **Add Link** to associate a web link to the image. This is a link to an external website or a page on the site. Click **Save**.

### Tab Strip

By default there is one tab strip for the site, which is shared across the pages. Any configuration changes done to the default tab strip reflects on every page where it is used. You can create a tab strip, 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  icon. This displays a tab strip configuration popup where you can specify number of tabs for the tab strip. To add a tab, click **Add**. You can specify the details for each tab, which are as follows:

- **Title:** Enter a title for the tab.
- **Selected:** Select **True** if the tab should be shown as highlighted or the current selected tab.
- **Url Type:** On each tab, you can set a URL which when clicked invokes a page within the site or an external site.
- **Target:** You can specify if the tab URL should be displayed in the same window or a new window.
- **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 **Select Pages**.
- **Tooltip:** Enter a tooltip for the tab.

To save the tab configuration click **Save**.


**Figure 36.5** Tab Configuration

Tab Configuration							
<input type="checkbox"/>	Title	Selected	URL Type	Target	Enabled	URL	Tool tip
<input type="checkbox"/>	Business Mode	True	Site page link	Same window	True	# <input type="text"/> Select Pages	Business Mode
<input type="checkbox"/>	Marketing to Consumer	False	Site page link	New window	True	# <input type="text"/> Select Pages	Marketing to Consumer

Note: For URL Type External link please specify a valid URL. e.g. http://WebsiteURL)

Delete Add Save Cancel

### Document Template

This allows the user to upload documents and embed them on the page. After adding the control to the page, click  icon. This displays a popup where you can upload the documents. The following options are available:

**Uploading Existing Document:** Click to upload an HTML, image, or any other existing document.

**Upload New Document:** Browse and upload a main document and a support document. If it is an HTML, then you can upload images, which are referenced by the document.

**Figure 36.6** Document Configuration

**Brand Guidelines Document Configuration**

▲ Associated Documents

Name
No documents present.

▲ Upload Documents

Upload Existing Document       Upload new document

Main Document       Support Document

\* Document:  No file chosen


▲ Uploaded Documents

Name
<input type="checkbox"/> MOM designer.doc *

Note: (\*) Indicates Main Document

To save the document template configuration, click **Save**.

### Online Discussion

You can add a discussion topic on the page. When any user visits the site and traverses to the page, the user can post comments against the topic. To configure an online discussion, add the control to the page and click  icon. A popup appears, enter the following details of the topic:


- **Title:** Title for the discussion.
- **Description:** Description of the topic for discussion.
- **Start On:** Start date of the topic.
- **Valid Until:** Topic validity date.
- **Remind me on Topic Closure:** If yes is selected, then a reminder is sent to the topic owner when the topic reaches the closure date.
- **Remind me before(Days):** You can specify how many days before the closure date you need to be reminded.
- **Closure Details:** Select when you want the topic to close—on the due date or do you want to be reminded about the closure.
- **Post Details:** Select if you want to receive a notification whenever there is a post.
- **Attachments:** You can upload attachment in the form of files for the topic.
- **Status:** You can select whether the topic is active or inactive.
- **# Comments per page:** Select the number of comments that should display on the page.




- **Reply Button Text:** Enter the label of the button, which the user can click to post comments.

To save the discussion, click **Save**.

### **Digital Asset Query**


You can add a Digital Asset Query, which displays the assets fulfilling the query on the page. Add the control on the page and click  icon. A Query Configuration popup appears. You can define the query by selecting filters. Specify the information to be displayed for the assets by selecting the attributes or fields. Specify the layout of the assets either grid or list view on the page and what action can be performed for each asset. Click **Save** to save the configuration.

### **Digital Asset Finder**

You can add a pre-configured Digital Asset Finder (DAF) component on a page. Digital Asset Finder allows the end user to form a search query to search for digital assets, which the end users can download from the page. Add the control on the page and click  icon. A Digital Asset Finder configuration popup appears. You can either select from a selection of pre-configured Digital Asset Finders or create a new finder by clicking **Configure**. Specify the layout by selecting the layout type, default rows and columns for list or the grid view. Click **Save** to save the configuration.

### **Linked Assets**

To add assets from the Digital Library on the site page:

1. Collect the assets from the Digital Library into the cart.
2. Add the control on the page and click  icon. An asset configuration popup appears.
3. Paste the assets from the cart by clicking **Paste from Cart**. All the assets in the cart are displayed.
4. Select the assets to show on the page.
5. Click **Save** to save the configuration.

---

## **Reviewing a Site**

You can send a site for a review by different individuals. To invite users to provide feedback and comments, click **Edit** link for the site on the site list. A Site Details screen with a list of pages appears. Click **Edit** to edit the site details. On the Site Configuration screen, click **Review Site** to set up a discussion topic. The current and the old reviews are displayed. To create a review, click **Create Review**. On the Site Review screen, enter the following details:

- **Title:** Title for the review.
- **Description:** Description for the review.
- **Start Date:** Day on which the review is initiated.
- **Valid Until:** Date until which the review is valid.
- **Attachments:** You can upload relevant files.
- **Invitees:** You can select the invitees for a topic by adding a group or a user.

Click **Save** to save the review. An e-mail notification is sent to all invitees.

The reviewer can provide their comments on the site either by clicking on the link in the e-mail or by launching the Site Builder solution, and clicking **Review Sites**.

---

## Site Builder Reports

To launch the reports, click **Reports** on the Dashboard under MOM. The Strategic Planner reports are displayed by default. Click **Site Builder** link on the left pane to view all the reports related to Site Builder.

The following Site builder reports are displayed:

- Site Asset Download
- Site Access Summary

After generating the reports, you can export the reports in PDF or Excel.

## Chapter 37

# Working with Timesheets

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---

## Timesheets

As a valuable resource of the organization, you work on various projects. The Timesheet module enables you to enter daily hours of work against the projects that you are assigned to. Users such as contributors, project managers, acting project managers, deliverable managers and users who have complete access on projects 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 helps a group of approvers in the organization view, approve, or reject the daily timesheets with comments.

The key benefits of the Timesheet module are:

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

On the left pane of the Dashboard screen, click **Timesheets** link. The following links are present on the left pane:

1. **My Timesheets:** (available to resources) Using this link, the resources can fill in the daily timesheets and submit it to the timesheet approval group.
2. **Timesheets for Approval:** (available to the timesheet approval group) Using this link, the timesheet approvers view the submitted timesheets and approve or reject them.

---

## Filling a Timesheet

As a resource who is expected to fill in a daily timesheet, click **Timesheets** link on the left pane. A My Timesheets screen is displayed 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*. This is a mandatory field.

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 are listed in the drop-down list.
- Project IDs of all the projects with status Onhold and  
 $\text{Timesheet date} \leq \text{Due Date} \leq (\text{Timesheet date} + 3 \text{ months})$
- Project IDs of all the projects with status Completed, Canceled, and  
 $(\text{Timesheet date} - 1 \text{ month}) \leq \text{Actual Completed Date} \leq \text{Timesheet date}$

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 are listed in the drop-down list.
- Project IDs of all the projects with status Onhold and  
 $\text{Timesheet date} \leq \text{Due Date} \leq (\text{Timesheet date} + 3 \text{ months})$   
 or if the Project ID (with status Onhold) is already selected for the timesheet.
- Project IDs of all the projects with status Completed, Canceled, and  
 $(\text{Timesheet date} - 1 \text{ month}) \leq \text{Actual Completed Date} \leq \text{Timesheet Date}$   
 or if the Project ID (with status Completed, Canceled) is already selected for the timesheet.

- **Project Title:** This is a read-only column and is 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:** Select the category from a drop-down list. All the resource categories to which the logged in resource belongs is listed in the drop-down. Resource category selection is mandatory
- **Description:** Enter the description related to the task.
- **Hours:** The number of hours the user worked for the selected day and the selected Project. This is a mandatory column.

The current date is selected by default. You can change the date by clicking the calendar icon and selecting the date or by clicking the Previous day or Next day arrows. When the timesheet date is changed, the timesheets for the corresponding date are displayed on the screen. Based on the status of the timesheet, details are displayed in either editable or read-only format. The following are the timesheet status values:

- Draft
- Submitted
- Approved
- Rejected

*Note:* You can edit the Timesheets with the status as Draft and Rejected. You cannot edit the Timesheets with the status as Submitted and Approved.

## Creating Timesheets

To create a timesheet, select the date, the project ID or title and the resource category to which the resource belongs. Enter the description and the number of hours the resource has worked (should not be more than 24 and less than 0.25 hours).

You can perform the following operations while creating timesheet :

- **Delete:** Select the rows and delete.
- **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 timesheets.
- **Submit:** After creating the timesheet, the resource can submit it to the user of the timesheet approval group for approval.
- **Copy Timesheet:** You can copy a selected timesheet by clicking **Copy Timesheet**.

## Copying Timesheets

If the resource copies a timesheet, a message is displayed on the screen stating the timesheet for the selected date is copied. If you try to copy a timesheet that is not saved, the system prompts you to save the timesheet.

After the timesheet is copied, select any other date where the copied timesheet should be pasted. On that screen **Paste Timesheet** is available. This button is visible only if a timesheet is copied. Click **Paste Timesheet** and confirm whether the copied timesheet should be appended or overwritten. By default the append option is selected. All the timesheet items are copied to the selected timesheet except the number of hours.

After the resource submits the timesheet, the user of the timesheet approval group receives a notification with a link to the timesheets. The notification mentions the number of timesheets that are waiting for approval. This notification e-mail is generated at 12 am.

---

## Timesheets for Approval

After logging on to the system as a user of the timesheet approval group, click **Timesheets** link on the left pane. A Timesheets for Approval screen is displayed. By default, all the timesheets submitted by the resources are displayed. You can search for timesheets using the filters provided in the search section.

Each timesheet is displayed with the following information:

- **Timesheet Submitted by:** Name of the resource or user who submits 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 is displayed in this column and highlighted. The anomalies can be any one of the following:
  - If the number of hours filled in the timesheet for a day are less than the available hours of the resource for that day.
  - 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 Administration 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 .

The details such as resource name, timesheet date, submitted on date, project ID, project title, description and the number of hours the resource worked for the day are displayed. You can approve or reject the timesheet and enter comments.

If the timesheet is rejected, a mail is sent to the resource with a link. The resource can 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 and Previous:** Click to view the previous timesheet in the list.
- **Save and Next:** Click to view the next timesheet in the list.

*Chapter 38*

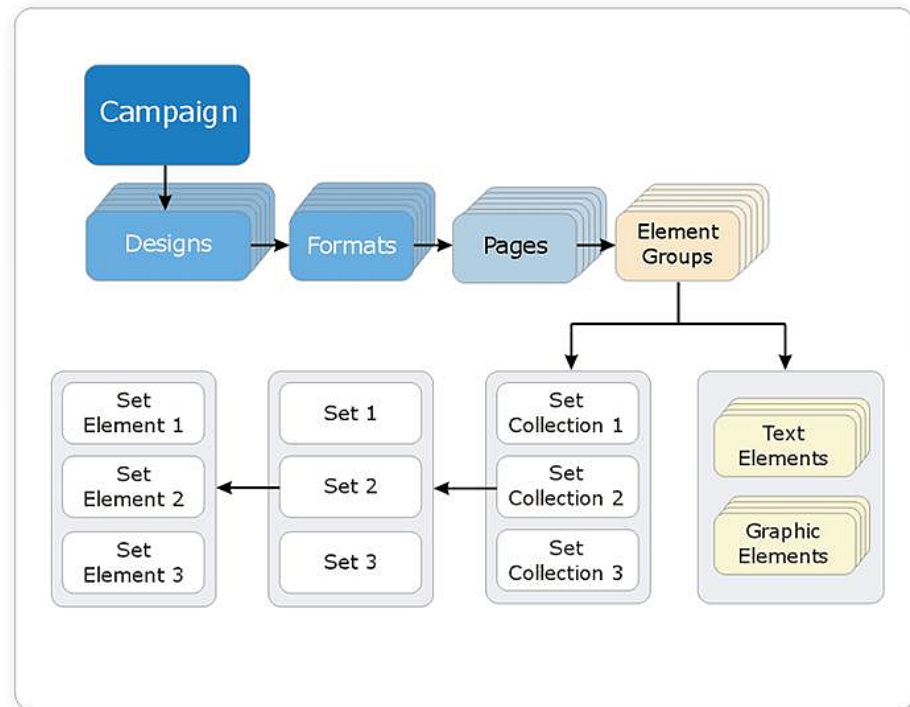
# Understanding Artwork Producer

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## Overview

Figure 38.1 Overview



Artwork Producer automates generation of artwork mechanics 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 customizing artwork. This ensures enterprise wide consistency of corporate and brand identity use.

Artwork Producer tool empowers the brand and marketing managers to configure artwork templates that reflect the use of brand elements. They designate areas where local teams can place customized graphics and text.

Marketing services teams and external design agencies can 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 use Artwork Producer to produce customized artwork without needing any design tools.

## Roles in Artwork Producer

- **Administrators or Back-Office personnel:** Administrators are the users who store the 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 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 in the Digital Library to store the Artwork Producer content that is, template and generated artwork. By default the name of the vault is set to **ArtworkProducer**, which along with other Artwork Producer related configuration could be changed using the Settings application.

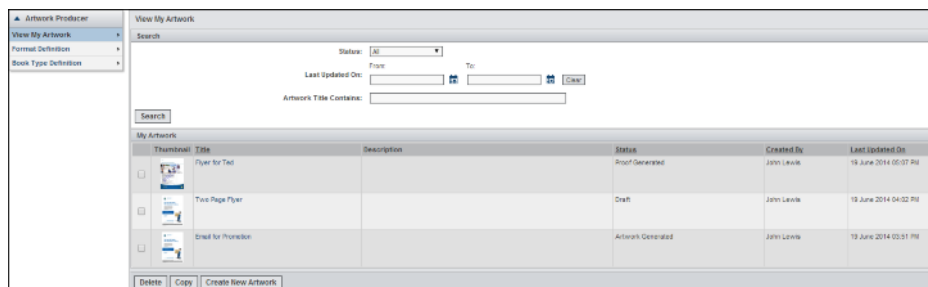
The administrator creates the vault using the Digital Library application. The vault should be a non-system vault and the name should be the same as specified in the Artwork Producer settings. Everyone should have complete access to this vault.

---

## Getting Started

After logging on, click **Artwork Producer** link on the Dashboard screen on the left pane. The application is launched.

**Figure 38.2** View My Artwork



The left pane is divided into sections providing users with the following functionalities:

- **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.

---

## Artwork Generation

### Overview

On the View My Artwork screen a search facility is available. You can search for specific artwork by entering the filters and clicking **Search**. The result appears in my artwork section.

Each row in my artwork list shows details such as the thumbnail, title, description, status, created on and last updated on (date). Click the artwork title to view the artwork.

You can select and delete the artwork. You can make a copy of a selected artwork. Create a new artwork by clicking **Create New Artwork**, a format or template list screen appears. You can search for artwork or formats using the search. Click **Search**.

All the formats or templates satisfying the search criteria are displayed. The formats with the released status are displayed here. The thumbnail, title, and description appear. To customize a format click **Customize**.

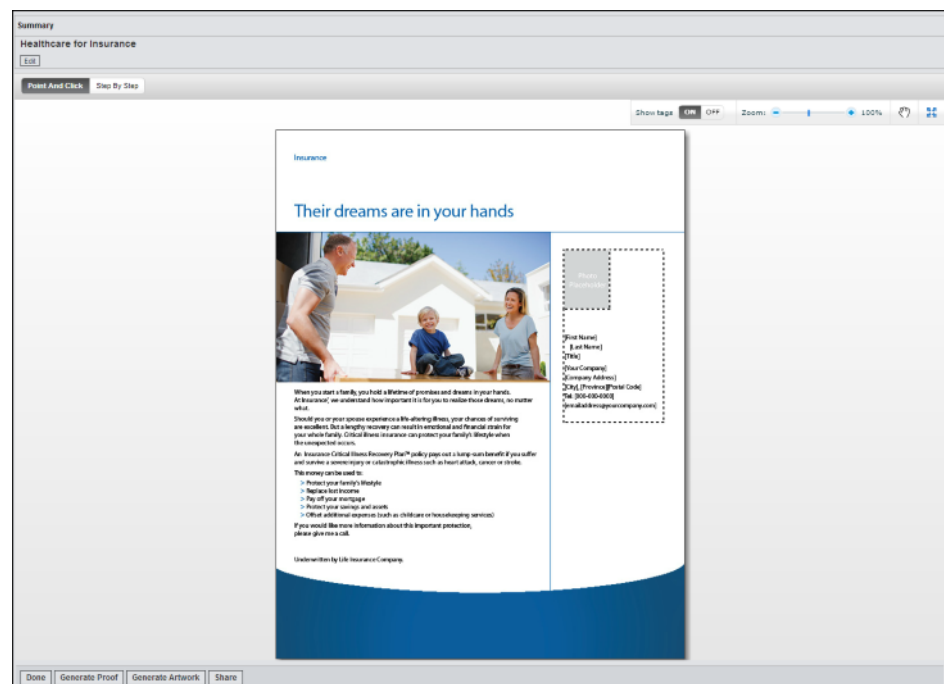
*Note:* If the Image editing option is available, then image editing for vector files such as .eps, .svg, .ps, .pdf, and so on, are not supported. The image processing tool used is ImageMagick which is a *raster image processor*. Any vector image such as .eps format. This results in loss of image quality and hence such files are not supported.

## Creating New Artwork Using an InDesign Format

On the Create Artwork screen enter the name and description. You can resize the format if the option is made available to the user while creating the formats. You can upload multi-page InDesign formats as one single InDesign (.indt) file. The system uniquely identifies and separates each page of the single file. A spread layout of pages is also supported in the system. Click **Next**. A Summary screen with the following two tabs appears:

1. **Point and Click:** The format appears and the tagged elements are highlighted.

**Figure 38.3** Point and Click Method



You can view and edit the name and description of the artwork by clicking **Edit**. You can hide the tags, zoom or pan the artwork and view the artwork in a full screen.

For editing the graphics element click the tagged graphics element. An Edit Graphics Element popup appears. Select the options given or browse and upload a graphics

element depending on the options available. You can crop, flip and rotate the image. Save the changed graphics element.

*Note:* The format of the replaceable graphics element can be any of the following types: eps, ai, bmp, gif, pct, pcx, pict, psd, png, tiff, jpg, jpeg.

After the changes are done, you can generate a proof, generate the artwork or share the artwork with specified groups or users.

2. **Step by Step:** On each page, provide either text or a graphical element as an input.

**Figure 38.4** Step by Step Method

After entering all the information, you can generate the proof, generate the artwork and share the artwork with specific users.

After generating a proof, you can view the artwork (with a watermark on the PDF document), edit, e-mail, share or finalize the artwork.

After generating the artwork the user can view, edit, e-mail, download the ZIP file, share or catalog the artwork to Digital Library.

*Note:* When you customize the artwork if any of the text elements are skipped, the default values are used in the final artwork.

3. **Auto Generated Artwork Based on Taxonomy:** Artwork Producer allows auto generation of artwork. InDesign formats can be configured with taxonomy based text

and graphics elements. The text and graphics elements can be stored as content chunks in the Digital Library.

You can generate your artwork 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 photograph which is stored in the Digital Library can be selected for an artwork. You can choose to customize and print marketing collateral that requires this photograph. Artwork Producer selects your photograph from the library based on your logon credentials automatically and generates the collateral.

Your sales office address and working hours can be stored as metadata in the library and this information can also be auto populated in the collateral and then printed.

### **Support for PDF Files as Ready to Use Formats**

Along with InDesign and HTML formats, PDF formats are also available for download and use from the Artwork Producer system. These formats do not require any generation. They can be downloaded and used for printing.

### **Creating New Artwork Using an HTML Format**

The steps for creation of artwork are the same as the InDesign.

Multiple artworks can be generated similar to the InDesign format.

*Note:* The replaceable graphics 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. You can choose to regenerate the artworks and update them with the changes in the content chunks. You can view the alert on the View My Artwork screen. Any changes made in the content uploaded in the Digital Library an alert appears in red under the title of the artwork.

If you click the title link of the artwork whose content is modified, the regeneration results are displayed with the update details of each tag that is modified.

The artwork is regenerated and all the changes in the content is reflected in the generated artwork.

*Note:* Once the artwork is submitted for generation, you do not need to wait for the generation to complete. You are notified about the artwork being ready for download or print.

---

## Format Definition

### *Creating Campaigns*

You can upload and configure the template prepared by the design agency into the system using Format Definition.

A View Campaigns screen appears with a search facility. You can search for specific campaigns by specifying the search criteria and clicking **Search**. The result appears in the campaigns section.

Each campaign information appears. Each campaign title has a link to modify the campaign details. You can select and delete campaigns by clicking **Delete**. Create new campaigns by clicking **Create Campaign**. A Create Campaign screen appears. Enter the details such as name, campaign number, description and campaign type and save the campaign details.

### *Creating Designs*

After saving the campaign, a View Campaign screen appears. You can edit the campaign details by clicking **Edit**. Create a design e by clicking **Create Design**. A Create Design screen appears. Enter details such as name, description and category and save the design.

Click **Save** button to save the design.

## *Formats*

### *Overview*

After saving the design, a Create Format screen appears. You can edit the design details by clicking **Edit**. You can import the format files present in the system.

### *Creating Formats in InDesign*

Select the format type as InDesign and click **Create Format**. A Create InDesign Format screen appears. Enter the format title, description and the category. You can reserve the format for a book.

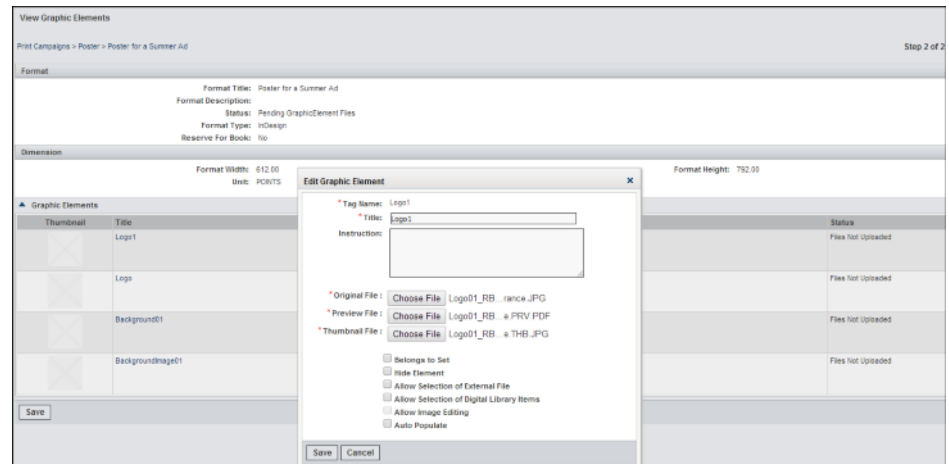
You can upload the format in the following two ways:

1. **Zip File**: Upload the format ZIP files by clicking **Browse**. The ZIP file contains all the original files related to the format, all the graphics elements related files, previews and thumbnails and some XML files. Save the format. After saving, the format is created and a confirmation message appears.
2. **Template File**: Upload the format in the following two step process:
  - a. Enter the format details such as format title, description, category. You can reserve the format for a book. Enter the format width, height and the unit in which the height and width is measured. Upload the format files, original should be an .eps or.ai file, preview which is a .pdf and thumbnail which a .jpg. Click **Next** to go to the next step of the format creation.

- b. A View Graphics Elements screen appears. To upload the graphics elements click the title link of the graphics element. An Edit Graphics Element popup appears. Upload the graphics element.

*Note:* The original file (EPS or AI) is mandatory. The preview and the thumbnail is generated by the system. It is not mandatory to upload the preview and the thumbnail.

**Figure 38.5** Upload Graphics Elements



On the popup the tag name appears. The title appears by default but can be changed. You can enter the instructions for the end user. Upload the original, preview and the thumbnail files.

*Note:* Uploading the original, preview and thumbnail is mandatory. The supporting or linked graphic images can be AI, EPS, JPG or GIF for the original if the format file is AI. If the format file is EPS, then the graphics element should be an EPS file, PDF for preview and JPEG for thumbnail.

The following four options can be given to the user:

- **Belongs To Set:** If this option is selected, the graphical element is 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. It is not visible 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 the 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. You can upload the optional images into Digital Library from here itself by clicking **Set Optional Images**. This is used where the company or the organization has some defined images or logos, which are used for artwork generation.
- **Allow Image Editing:** This option allows the user to edit the image while artwork generation.

*Note:* If the Image editing option is made available, then image editing for vector files such as .eps, .svg, .ps, .pdf, and so on, is not supported. The image processing tool used is ImageMagick which is a *raster image processor*. Any vector image such as .eps is first converted to a raster

equivalent, edited and then restored back to the vector format. This results in loss of image quality and hence such files are not supported.

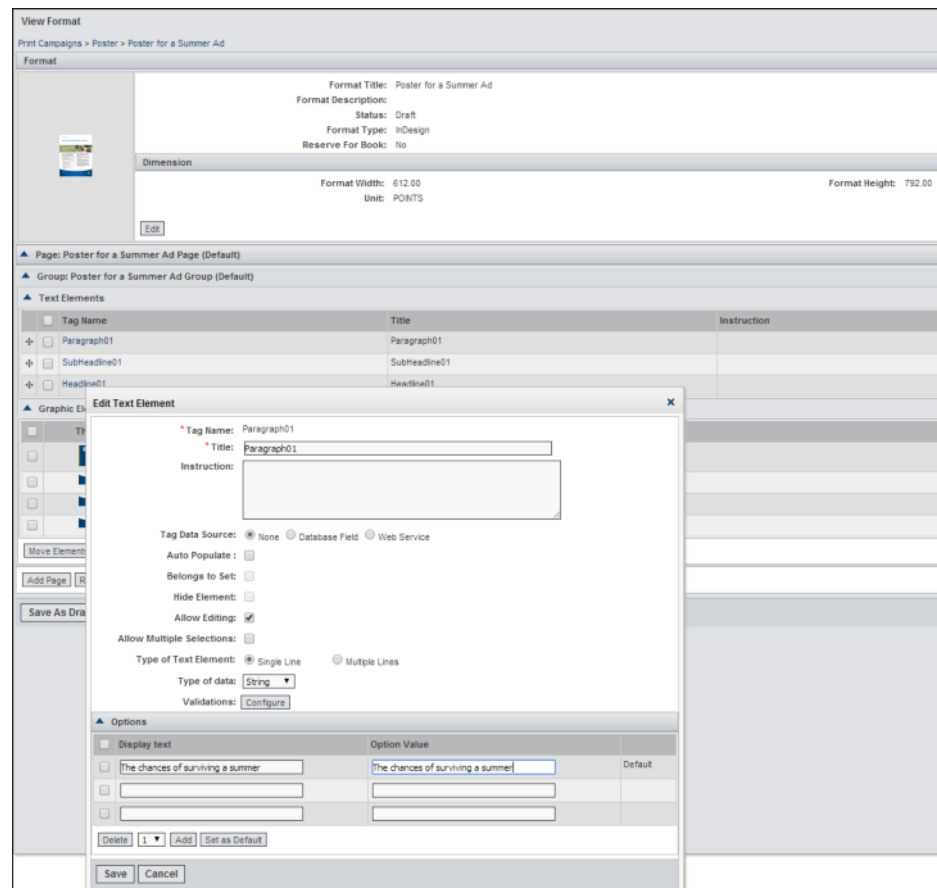
- **Auto Populate:** This option auto populates the image from Digital Library according to the search criteria added by the administrator. The first graphics element that matches the criteria appears.

Click Save to add the graphical element to the format. Once all the graphic files are uploaded click Save on the View Graphics Element screen to save the format.

After saving the format, a View Format Screen appears where you can edit the text elements. Click the text element tag name, an Edit Text Element popup appears. The tag name is present by default. Enter the following information:

- **Title:** Title is provided but you can change it.
- **Instruction:** You can enter the instructions for the end user.
- **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, you can select the fields from the database (facet) fields which are defined by the administrator.
  - **Web Service:** If this option is selected the text is called from the web service which is configured in the system.
- **Auto Populate:** The text is populated automatically according to the search criteria added by the administrator.
- **Belongs to set:** If this option is selected the text element is used in a set.
- **Hide Element:** If this option is selected then the text element becomes static and cannot be substituted by any other image. It is not shown during artwork generation.
- **Allow Editing:** This option allows the end user to edit the text while artwork generation.
- **Allow Multiple Selections:** This option allows the end user to select multiple text elements while artwork generation.
- **Type of Text Element:** This is disabled.
- **Type of data:** Select from the drop down.
- **Validations:** Click **Configure** to configure the text. You can configure the maximum length of the text which the user can enter. You can configure the display of the character count to be switched on. You can set the range of the selection (enter the minimum and maximum values).

Figure 38.6 View Format



On the View Format screen appears. The text as well as the graphics elements are displayed. On this screen you can move the elements and add and rearrange pages.

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 enter the minimum and maximum format width and height.

On the View Format screen click **Release** to release the format. The Formats can be published with restricted access to only certain groups and users in the system.

### Creating HTML Formats

Select the format type as HTML and click **Create Format**. A Create HTML Format screen appears. Enter the format title and description. Select the category as Artwork Producer. You can upload additional images which are not tagged in the template. Upload the format files by clicking **Choose File**. Upload the following files:

- **Original File:** Upload the original file, which is an .HTML/.HTM file.
- **Preview File:** Upload the preview file, which is a .PDF/.JPG file.
- **Thumbnail File:** Upload a thumbnail file, which is a JPG file.

Save the format. A View Graphics Elements screen appears.

Upload the graphics elements by clicking the title link. On the popup the tag name appears. The title appears by default but can be changed (mandatory). Enter the instructions for the user. Upload the original, preview and the thumbnail files. The options are similar to the ones while uploading the InDesign format.



Once all the graphic files are uploaded click **Save** on the View Graphics Element screen to save the format. The View Format screen . Release the format for artwork generation by clicking **Release**. You can publish the formats with restricted access to certain groups and users in the system by clicking **Share**.

### **Import, Export and Downloading Formats**

On the View Design screen, you can do the following:

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#### **Import Format**

You can import files from the system. The exported ZIP file can be imported to another design or to the Format Definition module of any other installation of SAS Marketing Operations Management by clicking **Import Format**.

---

#### **Download Format**

The format files present in the system can be downloaded from the format list. Click **Download Format** link in the formats list to download the format files along with all the linked files. This feature is used if you need to edit the format files and upload it again. A ZIP file is prepared with all the above-mentioned contents.

---

#### **Export Format**

The format files present in the system can be exported from the formats list. Click **Export Format** link to export the format files along with the format information (text and graphic) and all the linked files. This feature is used if you want to upload the format files into another installation without having to generate the template files again. A ZIP file is prepared with all the above-mentioned contents.

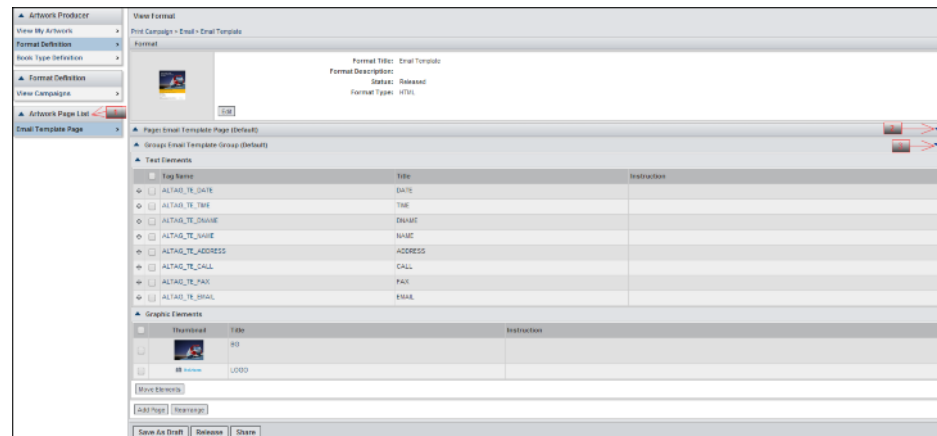
---

### **Pages and Groups**

A design can have multiple graphical and text element. To organize them in a logical fashion, they can be grouped and 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 or registered, a single page with a group is created for the design. To add more pages edit the design by clicking the format title link on the View Design screen. A View Format screen appears. You can add pages and groups to the format. List of pages for the format appear on the left pane under the Artwork Page List.

Figure 38.7 Add Pages and Groups



The following is seen on the View Format screen:

- The artwork page list shows the list of pages for the format.
- **Move Elements:** You can move the elements from one page to another.
- **Add Page:** You can add pages to the format.
- **Rearrange:** A Rearrange Artwork Pages and Element Groups screen appears. You can arrange the pages in order of appearance during the artwork generation.
- **Save as Draft:** You can save as a draft. the format is not available to the end—user until it is released.
- **Release:** You can release the artwork for artwork generation and production.
- **Share:** You can share the format with specific groups and users.

Clicking ▾ icon on the Page: Header bar. You can perform the following actions:

- **Add Group:** You can add groups to the page.
- **Edit Page:** You can modify the current selected page.
- **Delete Page:** You can delete the current page.

Clicking ▾ icon on the Group: Header bar. You can perform the following actions:

- **Move Group:** You can move groups to different pages. (Default group cannot be moved.)
- **Edit Group:** You can modify the current selected group.
- **Delete Group:** You can delete the current group.

## Book Type Definition

Using Book Type definition, you can create a book template using the formats uploaded in the system which the end user can use. The format for which the option Reserve for Book is set to Yes are available to be used in the book type definition.


Click the **Book Type Definition** link on the left pane. A **View Book Types** screen appears. A search facility is available to search for specific book types. A list of the

book types is displayed. A selected book type can be deleted or copied. Click **Create** to create new book types.

A Create Book Type screen appears. Enter the title, description, category and the thumbnail file (image to be displayed for the book type).

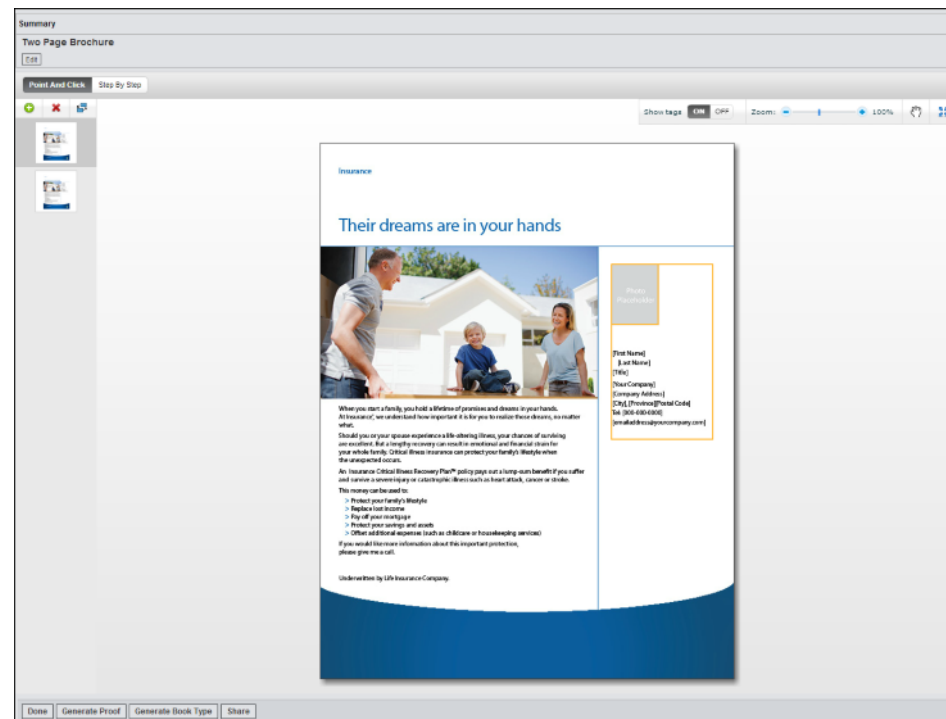
Select whether to publish the book type. Save the details.

A Summary screen appears. You can edit the book type information. You can create book types in the following two ways:


1. **Point and Click:** You can add pages by clicking  icon. These pages are the

generated artwork and those which are specified to be reserved for a book type. You can delete reorder pages. You can switch the tags on or off, zoom, pan or view the artwork in a full screen. You can view or edit the replaceable graphics element by clicking on it.

**Figure 38.8** Point and Click



You can edit the graphics elements on the Edit Graphics Element screen. You can crop, flip or rotate the image.

2. **Step by Step:** You can add pages by clicking  icon. These pages are the

generated artwork and those which have been specified to be reserved for book type. You can delete or reorder the pages. All the page information appears on the right of the screen. The replaceable files are also displayed. You can select the required images or text for the book type and then save it as a draft.

Figure 38.9 Step by Step

The screenshot displays the 'Step by Step' configuration interface for a 'One Page Flyer - New Campaign Page'. The interface is organized into several sections:

- Summary:** Shows the document type as 'Two Page Brochure' with an 'Edit' button.
- Navigation:** Includes 'Point And Click' and 'Step By Step' tabs, along with icons for adding, deleting, and saving.
- Step 1:** 'One Page Flyer - New Campaign Page'.
- One Page Flyer - New Campaign Group:** Contains the following form fields:
  - AdvisorInfo\_FirstName: [First Name] (with a radio button for [First Name])
  - AdvisorInfo\_LastName: [Last Name] (with a radio button for [Last Name])
  - AdvisorInfo\_Title: [Title] (with a radio button for [Title])
  - AdvisorInfo\_YourCompany: [Your Company] (with a radio button for [Your Company])
  - AdvisorInfo\_CompanyAddress: [Company Address] (with a radio button for [Company Address])
  - AdvisorInfo\_City: [City] (with a radio button for [City])
  - AdvisorInfo\_Province: [Province] (with a radio button for [Province])
  - AdvisorInfo\_PostalCode: [Postal Code] (with a radio button for [Postal Code])
  - AdvisorInfo\_Tel: [000-000-0000] (with a radio button for [000-000-0000])
  - AdvisorInfo\_Email: [emailaddress@yourcompany.com] (with a radio button for [emailaddress@yourcompany.com])
  - AdvisorInfo\_Photo: A 'Select Options' section with:
    - No File Uploaded (with an 'Upload' button)
    - Photo Placeholder (with a placeholder image)
- Buttons:** 'Save As Draft' is located below the form fields. At the bottom of the interface are buttons for 'Done', 'Generate Proof', 'Generate Book Type', and 'Share'.

Once the book type is ready, you can do the following:

- **Generate Proof:** A proof of the book type is generated and it can be viewed, edited, e-mailed or finalized.
- **Generate Book Type:** The book type is generated and it can be viewed, edited and e-mailed.
- **Share:** You can share the book type with a certain set of users or groups that is, access is granted or denied to users or groups.

## Chapter 39

# Using Knowledge Manager

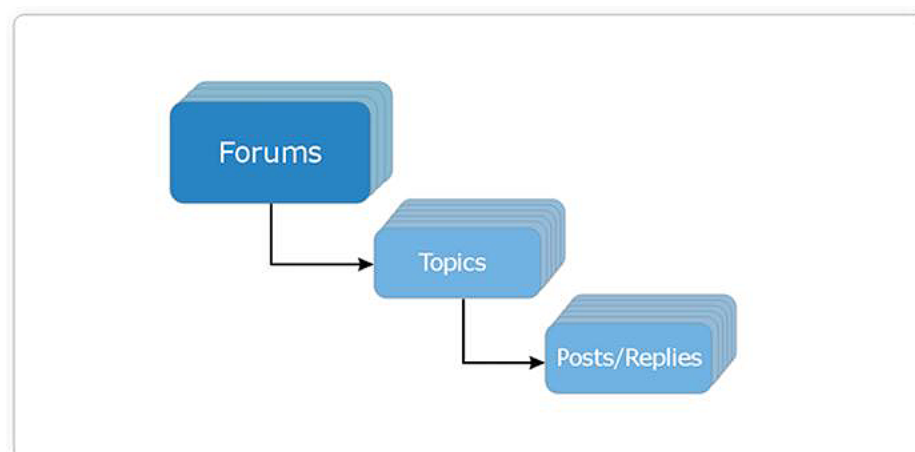
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## Overview

*Figure 39.1 Knowledge Manager Overview*



SAS Marketing Operations Management's 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.

---

## User Roles

**Forum Administrator:** The Forum Administrator has the ability to create a forum as well as edit, delete or modify it. This user can open or close the forum and select the moderator.

**Forum Moderator:** The Forum Moderator moderates the topics under the forum and can edit, delete or modify any topic in the forum. This user 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 users can browse and navigate forums and topics. They can also view topic details, read posts for a topic as well as download files attached to a post. They can post their comments on a topic and edit and delete their own posts.

**Invitees Group or Users:** These users can browse and navigate forums and topics. They can also view topic details, read posts for a topic as well as download files attached to a post. They can post their comments on a topic and edit and delete their own posts.

---

## Getting Started

After logging on, click **Knowledge Manager** link on the Dashboard screen in the left pane to launch the solution. Links such as **Forum** and **Search** appear on the screen.

---

## Discussion Forum

The lists of forums, which are configured in Knowledge Manager, are displayed. An administrator can view all the forums. The moderators can view only those forums to which they are given access.

### Create Forums

After launching Knowledge Manager, lists of forums are displayed. Details such as the forum name, number of topics in a forum, description and the date on which the forum was updated.

Click **New Forum** on the forum list screen to create a new forum. A Forum Details screen appears.

Enter the following details:

- **Title:** Enter the title for the forum.
- **Description:** Enter the description for the forum.

- **Moderator:** Enter the first letter and a drop down list appears. Select the moderator for the forum.
- **Permitted Groups:** You can add a selected set of groups who can view the forum by clicking **Add Group**.

To save the new forum, click **Save**.

## Creating a Topic

To view the forum details, click on the forum name link on the Forum screen. The forum details and list of topics under it are displayed.

This forum details appear. You can edit the details by clicking **Edit**. The list of topics for the forum are displayed. Details such as topic name and the number of comments, status of the topic, last updated on and the last comment posted on dates are displayed. You can delete selected posts. To create a new topic click **New Topic**. A New Topic screen appears. Enter the following details:

- **Title:** The title for the topic.
- **Description:** Enter the description for the topic.
- **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:** If yes is selected, then a reminder is sent to the topic owner when the topic reaches the closure date.
- **Remind me before(Days):** You can specify how many days before the closure date you need to be reminded.
- **Closure Details:** Select when you want the topic to close, on the due date or do you want to be reminded about the closure.
- **Attachments:** You can upload attachment in the form of files for the topic.
- **Invitees:** The user can select the invitees for a topic by adding a group or a user.

Save the new topic by clicking **Save**.

**Figure 39.2** New Topic

Knowledge Manager  
New Topic

\* Title: Exploring the Power of Brand

Description:

\* Start Date: 01 July 2014

\* Valid Until: 30 August 2014

Remind me on Topic Closure:  Yes  No

Remind me before(Days): 2

Closure Details:  Close on Due Date  Notify on Closure and Reopen

Post Details:  Notify on Post

Attachments: No Files attached.

Upload



Invitees:

Invitee Name	Invitee Type
<input type="checkbox"/> Campaign Designer	Group
<input type="checkbox"/> Creative	Group

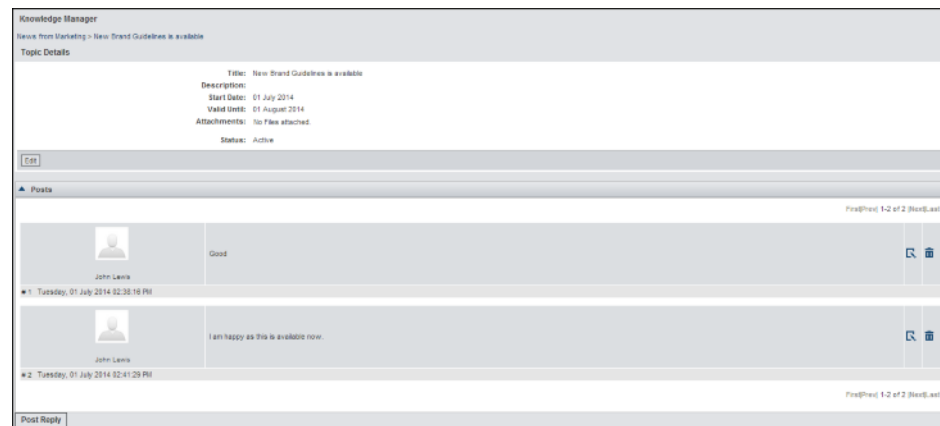
Delete Add Group Add User

Save

## Posting Comments

All the invited users receive 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 screen. Details such as title, description, start date, valid until, attachments if any are displayed and the status (open or closed) of the topic appears. The topic owner can edit these details by clicking **Edit**. The replied posts for the topic are displayed. The post list shows the responder's name, the date and time of post and the post details. The list of attachments if any are displayed along with the post. You can edit the post by clicking  icon or delete it by clicking  icon.

**Figure 39.3** Topic Details



To post comments click **Post Reply** on the Topic Detail screen. A Post Reply screen appears. Enter the comments in the text box. The text box has rich text editing facilities. You can attach files to the comments by clicking on **Add Attachment**. After entering the comments and uploading the attachment, click **Post Reply**.

## Closing and Reopening a Forum

On the Forum Details screen click **Edit**. A Topic Details screen appears. You can mark a forum closed by clicking **Mark as Closed**. Enter the reason for the closure and click **Close**.



Figure 39.4 Closing a Forum

Knowledge Manager  
News from Marketing > New Brand Guidelines is available

Topic Details

Title: New Brand Guidelines is available

Description:

Start Date: 01 July 2014

Valid Until: 01 August 2014

Remind me on Topic Closure:  Yes  No

Remind me before(Days): 1

Closure Details:  Close on Due Date

Post Details:  Notify on Post

Attachments: No Files attached

Invites:

Invitee Name	Invitee Type
No Invitees selected.	

Status: Active

▲ Posts

First Prev 1-3 of 3 (last) Last

John Lewis	Good	<input type="button" value="Reply"/> <input type="button" value="Delete"/>
#1 Tuesday, 01 July 2014 02:38:16 PM		
John Lewis	I am happy as this is available now.	<input type="button" value="Reply"/> <input type="button" value="Delete"/>
#2 Tuesday, 01 July 2014 02:41:28 PM		
John Lewis	This is one of the best videos I have seen for a TV Ad. I think the camera man was very professional and knowledgeable.	<input type="button" value="Reply"/> <input type="button" value="Delete"/>
#3 Tuesday, 01 July 2014 02:42:35 PM		

First Prev 1-3 of 3 (last) Last

For reopening forums click **Edit** on the Forum Details screen and click **Reopen**.

## Search for Forum, Topic or Post

After launching Knowledge Manager click **Advanced Search** link in the left navigation bar. A search screen appears where you can search for a topic or post by specifying the dates when they were created or by providing a keyword.



## Chapter 40

# Reports

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## Overview

The Ad Hoc reporting tool allows a user to easily define and generate reports based on the user's needs. The reports that are scheduled can be delivered to a selected set of users and groups. This tool works off an Operational Data Store (ODS) defined for the SAS Marketing Operations Management database. This tool supports all major modules of SAS Marketing Operations Management, which include Strategic Planner, Estimates, Marketing Workbench and Digital Library, Resource Management, Timesheets, Forecasts, Artwork Producer, Product Information Management, and Claims Management. The data displayed on the generated reports is not real time, it is from the previous day.

---

## Getting Started

Click **Reports** link on the left pane on the Dashboard screen. By default the Strategic Planner reports are displayed. To create ad hoc reports click **Ad hoc Reports** link on the left pane. You can create customized reports.

After clicking **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 appears. The report can be viewed, exported to excel and printed.

Clicking 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 **New Report** on the Configured Ad Hoc Reports screen. A Create Report screen appears. Enter the report name, description, and status. Save the details to continue.

**Figure 40.1** Create Report

The screenshot shows the 'Report Details' interface for a report named 'Marketing Activity Report'. The report's description is empty, and its status is 'Publish'. Below the report information, there are three tabs: 'Configuration', 'Schedule', and 'User Roles'. The 'Configuration' tab is active, showing a 'Target Entity' dropdown set to 'Invoice Details' with a 'Select' button. Below this, a message says 'Drag the field from Target Entity, Related Entities, Related Facets onto the area below.' There are three columns: 'Target Entity' (with fields like 'Invoice Paid On - Quarter', 'Invoice Reconciled On', etc.), 'Related Entities' (with 'Invoice - Commitments', 'Leaf Level Activity - Invoice', etc.), and 'Related Facets' (with 'Related Facets'). Below the columns are three tabs: 'Define Filters', 'Define Display Columns', and 'Define Personalization Fields'. The 'Define Filters' tab is active, showing a filter for 'Invoice Details Fiscal Year' set to 'Equal to 2014' and another filter for 'Invoice Details Invoice Created On' set to 'Between 01 July 2014 AND 31 October 2014'. At the bottom, there are 'Save', 'View Report', and 'Cancel' buttons.

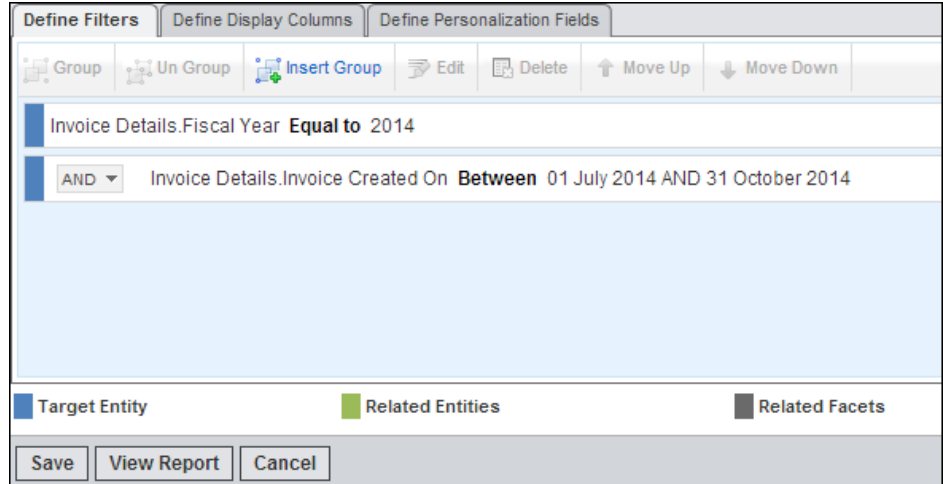
A Report Details screen appears with the details. You can edit the details by clicking **Edit**. The following three tabs are displayed:

1. **Configuration:** You can define the report by dragging and dropping the fields for the report into the **Define Filter** tab below. When the fields are dragged into the filter tab, a select filter popup appears where the filter name is present by default. You can specify the operator and the filter value. Click **Add** to add the filter.

You can perform the following actions in the define filters tab:

- **Group:** To group the defined filters, select the filters by holding the **Alt** key on your keyboard and click **Group**.

Figure 40.2 Define Filters

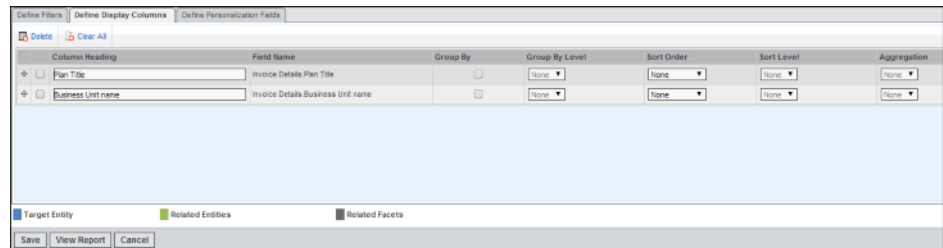


- Ungroup: Select the group and click **Ungroup** to ungroup the filter criterion.
- Insert Group: Click **Insert Group** to insert a group and then add the filters to it.
- Edit: Select the filter criteria and click **Edit** to make changes in the criteria.
- Delete: Select the criteria to delete it.
- Move Up: Select the criteria and click **Move Up** to position it above the other criterion.
- Move Down: Select the criteria and click **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** and **Define Personalization Fields** tabs and dragging the fields into the section. Enter the column heading, define the grouping, sort level, and the aggregation.

Figure 40.3 Define Display Columns



Select the fields that the end user can personalize on by going into the **Define Personalization Fields** tab and dragging the fields into the section.

Once the filters, display columns and personalization fields are defined, you can generate the report. Save the report definition.

2. **Schedule:** You can schedule the report by going into the **Schedule** tab. Click **Add Schedule**.

**Figure 40.4** Schedule Reports

A Create Schedule popup appears. Enter the details for scheduling the report such as schedule type, start date and time to send the report. Refer to [Table 40.1 on page 371](#) for more details about scheduling the report. Enter receivers e-mail IDs.

After the report is scheduled, the report will be sent to the concerned individuals on the specified day and time.

3. **User Roles:** You can add the authors and readers (users and groups) for the report. These users or groups have access to the report. The authors can edit or modify, schedule and generate the report. The reader can view and schedule the report.

You can export these Ad Hoc reports to excel or HTML.

---

## Scheduling a Pre-defined Report

You can schedule the following reports from the list on pre-canned reports:

1. In Strategic Planner: The Overspent Report, Activity Budgets and Spends Reports.
2. In Marketing Workbench: The Project Details report.

Enter the scheduling details. Provide the following details for scheduling the report:

- **Report name:** By default the report name appears which you can change.
- **Description:** Enter the description.
- **Schedule Type:** Select **Run Once** or **Run Between**.
- **Start Date:** If the run once option is selected, then enter only the start date. If the run between option is selected, then enter the start and the end date.
- **Run Cycle:** You can select the following run cycle:

**Table 40.1** Run Cycle

Option	Explanation
Daily	If you select this option, then you can select if you want the report generated on weekdays only or on all days.
Weekly	If you select this option, then you can select any day or days in the week on which you want to generate the report.
Fortnightly	If you select this option, then a note appears saying that the report is sent in 15-day interval starting from the start date specified.
Monthly	If you select this option, then select whether the report should be generated on the first day or the last day (any day in the week). Specify which months the report should be generated.
Quarterly	If you select this option, then a note appears saying that the report will be sent on the first day of every quarter based on the fiscal month setting.
Yearly	If you select this option, then select the month and the day of the month for which 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 e-mail attachment to a set of users. The e-mail addresses should be separated by a comma.

*Note:* The report is scheduled and sent as a PDF.





## Chapter 41

# Managing Vendors

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## Tools

### *Vendor Management*

Vendor management provides a centralized repository to manage the resources which are not the users of SAS Marketing Operations Management. You can store the categories for a vendor and all the relevant information related to the vendor mentioned below:

1. List of contacts: The list of contacts for the vendor.
2. General contract terms such as minimum commitments, payment terms, out-of-pocket expense policies, and so on.
3. Resources and their skill levels: You can store the resources and the skill levels of each resource.
4. Rate card for services and goods: The vendor rate card can be maintained in the system. The rate card specifies the rates per resource category of the vendor which could be non-human resources as well.

Click **Vendor Management** link on the left pane under **Tools**. A View Vendors screen appears.

### *Creating New Vendors*

On the View Vendors screen, you can view the existing vendors in the system by searching alphabetically or by vendor type.

Create new vendors by clicking **New**. A Create Vendor screen. Enter the following details:

- **Vendor Number:** You can enter the vendor number or it is auto generated depending on the setting.

- **Name:** Enter the vendor name.
- **Description:** Enter the vendor description.
- **Vendor Address:** Enter the address of the vendor.
- **Vendor Type:** Select the preconfigured vendor types from the drop-down list. The vendor types are configured from the Strategic Planner admin.
- **URL:** Enter the URL of the vendor.
- **Currency:** Select the currency from a drop-down list. This is the currency used by the vendor for all the transactions.
- **Business Unit(s):** Select the business units from the drop-down list.
- **Holding Company:** Enter the name of the holding company.
- **Business Type:** Enter the business type.
- **Mark as Obsolete:** Select yes or no.
- **Vendor attachments:** Upload any vendor attachments by clicking **Upload** and browsing through the file system.
- **Contract Information:** Enter the description of the contract and upload any contract documents.

Save the vendor information by clicking **Save**.

To modify the existing vendors, click the vendor name link. To delete the selected vendor, click **Delete**.

### **Viewing Vendors**

After saving the vendor details, clicking the vendor name link on the View Vendors screen, a view vendor details screen is displayed. The following tabs are displayed on the view vendor details screen:

1. **Information:** The vendor information is displayed. You can edit the information by clicking **Edit**.

Figure 41.1 View Vendor Details — Information Tab

**View Vendor Details**

Vendors > Creative Eye Pvt. Ltd

Information | Contacts | Resources | Rate Card

▲ Vendor Details

Vendor Number: 1001  
 Name: Creative Eye Pvt. Ltd  
 Description: Advertising Agency  
 Vendor Address: USA  
 Vendor Type: Campaign Vendors  
 URL: http://www.CreativeEye.com  
 Currency: USD  
 Business Unit(s):  
 Holding Company: SSL  
 Business Type: Advertising  
 Mark as Obsolete: No  
 Vendor Attachments: No Files attached.  
 Vendor Created On: 07 July 2014

Contract Information

Description: Contract Info fro 2014-2015  
 Contract Documents: No Files attached.

Edit


2. **Contacts:** The vendor contacts are displayed with the name, e-mail, residence, mobile, office and fax numbers. You can view the details for each contact by clicking the contact name link. You can edit the contact details by clicking  icon on the extreme right side. The vendor can add contacts by clicking **Add Contact**.



Figure 41.2 View Vendor Details — Contacts Tab

**View Vendor Details**

Vendors > Creative Eye Pvt. Ltd

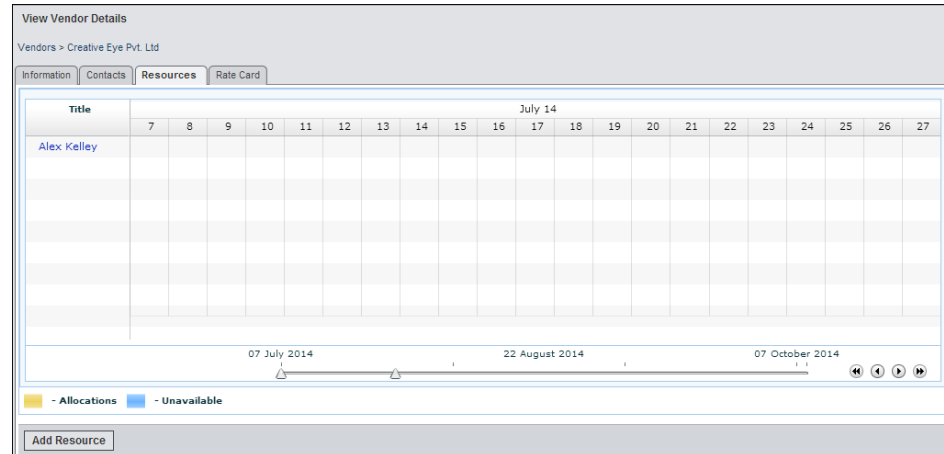
Information | Contacts | Resources | Rate Card

▲ Vendor Contacts

Name	Email	Residence	Mobile	Office	Fax	
<input type="checkbox"/> Agnew Spie	Agnew.Spie@example.com					
<input type="checkbox"/> Jim Stacy	Jim.Stacy@example.com					

Details | Add Contact


3. **Resources:** On the View Vendor Details screen in the resource tab a graphical view of the vendor resource allocations are displayed. The projects that an agency is working on for the year, their corresponding resource hours (allocated and unallocated) are displayed.

**Figure 41.3** View Vendor Resource

To add the resources of the vendor, click **Add Resource**. A Create Resource screen appears. Enter the following resource details:

- a. **Is Resource the user of the system:** This is selected by default.
- b. **Select User:** Enter the user name in the text box to search the users. If the text is in red, then it is not a valid user.
- c. **Resource Category:** To select the resource category (Configured in resource management), click **Select**.
- d. **Resource Type:** Select from the drop-down list, for example, it could be internal, freelancer, contract, and so on.
- e. **Unit of Measurement:** Select the unit of measurement as hour.
- f. **Rate:** Select the currency and enter the rate for the resource.
- g. **Skill Level:** Enter the skill level of the resource.
- h. **Country:** Select the country from the drop-down list.

After saving the resource details, a Resource Details screen is displayed with the following two tabs:

- **Information:** The resource details are displayed here.
  - **Availability:** You can mark the availability and the unavailability of the resources.
4. **Rate Card:** To edit each item on the rate card, click  icon on the extreme right side. Click **Save**. You can add more rows for more rate card items.

---

## Adding Rate Card Item Type

Click **Rate Card Item Type** link on the left pane of the View Vendor screen. A Create Rate Card Item Type screen appears. To search for the existing rate card item types in the system, enter the name and search. To modify the existing rate card item type, click the name link.

To create new rate card item type, click **Add Item Type**. A Create Rate Card Item Type screen appears. Enter the name, description and the item type (Configured in Schema

Designer under **RATECARDITEMTYPE** named hierarchy). Save the rate card item type.



## Chapter 42

# Using Partner Channel Management

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## Overview

The Partner Channel Management module provides each partner, vendor or agency with an exclusive login. Restricted access to data and functionality is provided, ensuring that they can access the information that they need.

The access granted includes the ability to do the following:

- Download published digital assets stored in the Digital Library. Gain visibility into the Media Library.
- Submit estimates or quotations for completing a marketing project by entering the information online directly into the solution.

Log on to Partner Channel Management by entering **http://<MOM IP>/<Tenant name>/pcm**, for example, **http://1.1.1.1/MOM/pcm**. Enter your credentials. By default the Dashboard appears. You will see the links that are made available to you by the administrator.

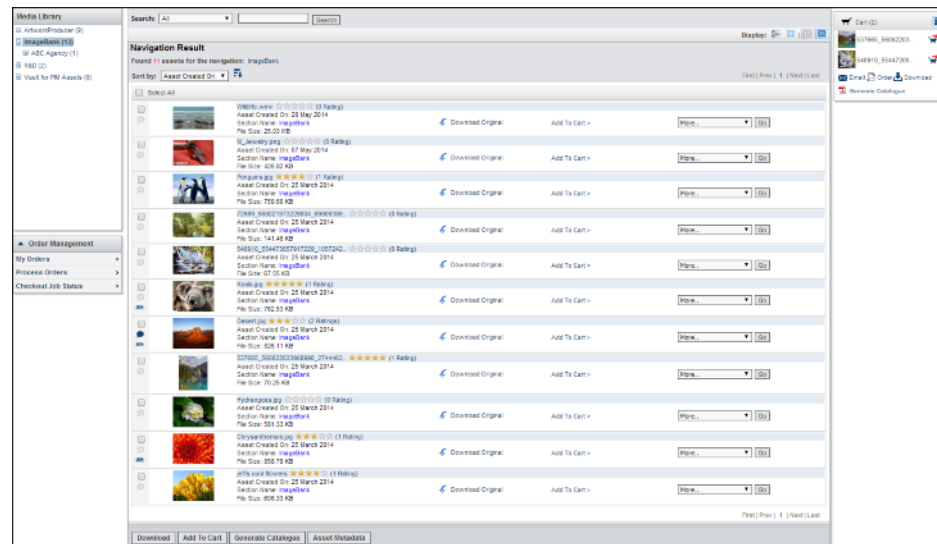
---

## Media Library


### *Using the Media Library*

After logging on, click **Media Library** link in the left pane. A Media Library screen appears.

Figure 42.1 Media Library



The screen displays the following information:

- The left pane has the vaults and section from the Digital Library. Only the hierarchy which the administrator gives you access to is visible. You can drill down to see the section and the subsections.
- You can search for specific asset using the search facility.
- The search results appear in the Navigation Result section.
- You can sort the assets by the asset created on, download count, average rating and number of ratings.
- You can preview all the displayed assets on a mouse over. You can play the preview of the video files.
- If any files are linked,  icon appears next to the asset. You can click on the link icon to view all the linked files.
- If any one has commented on an asset a bubble appears next to the asset. You can click it to view the comments.
- All the asset information configured by the administrator appears next to the asset.
- You can download the asset or copy it to the cart.
- To see more information, select the option from the drop down list and click **Go**.
- The Cart appears on the right of the screen.

You can do the following operations in the cart:

- **E-mail:** You can attach assets from the cart to the e-mail and post it to the sender. E-mail can be sent to users who are not registered users of the system.
- **Order:** You can order the assets from the cart.
- **Download:** You can download multiple assets from the cart.
- **Generate Catalog:** You can generate a catalog of the assets in the cart. The catalog is generated with assets and the asset information.

The following buttons are available on the Navigation Result screen:

- **Download:** Select the asset and download them.



- **Add to Cart:** Select the assets and add them to the cart.
- **Generate a Catalog:** Generate a catalog of the assets present in the selected section.
- **Asset Metadata:** Generate an Asset Metadata report of the assets present in the selected section. This report contains all the digital assets and the metadata associated with them. Metadata includes system information, business information, version history, comments, and so on. Asset Metadata Report helps export all this metadata into a report in a printable format.

## Ordering Assets

From the cart, you can order assets by clicking **Order**. An Order Media screen appears, select your order (Original, preview). Click **Shipping Details**. Select the shipping mode, the delivery type, enter the shipping address and click **Continue**. Confirm your order or make changes by going to the previous screen.

After confirming your order, it is available in order list of **My Orders**. You can check the status of your orders by clicking the order number link. The price and shipping charges are available for you to see.

---

## Estimate Management

### Viewing and Importing Estimates by the Vendor

Click **Estimates** link in the left pane. All the estimates that are submitted from the Strategic Planner to the vendor to define new work-items or to modify the existing ones are displayed. You (vendor resource) can update an estimate by defining the work-items and re-submit it to the initiator of the estimate for the review process. After selecting the attributes save the settings.

The initiator reviews it and either approves or rejects it. If rejected, then the estimate is resubmitted to you 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 you (vendor) for further modifications. If the estimate is approved by all reviewers, then the initiator can mark it complete.

Importing or Viewing the Actual Item details: The vendor can import the actual item details against an estimate. Click **Import Actuals** link in the left pane.

You can select the following file types for a sample template:

- **Agency Hours Template:** In this template enter the plan name, work item number, resource category path, resource category name and the quantity for a particular month.
- **Out of Pocket (OOP) Template:** In this template enter the plan name, work item number, resource category path, resource category name and the total cost for a particular month.

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

Based on a configuration setting, vendors are 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 is imported, you can view the status of

the job by clicking **View Import Jobs** link. A list of jobs with their status appears. A notification is sent to the owner or 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 the estimate name link to view the estimate.

A Review Estimate screen appears with the following tabs:

- **Estimate:** The estimate details, work items and the reviews are displayed. The estimate can be marked as complete by clicking **Mark as Completed**.

*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.

- **Workflow:** The initiator of the estimate can initiate a workflow by selecting a job type.
- **Previous versions:** The versions of the estimates are 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.