

Smart Access

Administration Manual

Version 7.2

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1 Introduction

Here you can find some tips and information that will help you to efficiently carry out tasks related to Smart Access. Smart Access is comprised of pages, tiles, and placeholders. You can use Smart Access to simplify your entry point in the Marketing Efficiency Cloud. For example, you can:

- Create a user-friendly "breadcrumb trail" leading to important content.
- Make it easier to find assets that you require on a daily basis.
- Provide an application-based, cross-module graphical user interface.

Pages

Pages consist of tiles and placeholders. You can link pages to each other using a tile, creating a navigation element within Smart Access.

Tiles

A tile can provide a link to the following destinations:

- A different page in Smart Access
- Another Marketing Efficiency Cloud module
- An external web page/URL

When users click a tile, they are forwarded to the destination defined in the tile properties. The modules that can be selected as the destination module in the Marketing Efficiency Cloud are determined by which modules you are using.

Placeholder

You can use placeholders to create free space between individual tiles or align tiles. Placeholders are only visible in edit mode.

Visibilities of a tile

The visibility of a tile can be restricted based on the following criteria:

- For users in a selected organizational unit
- For users who have access to a specific virtual database
- For users who have specific rights

Page layout

In the page options, you can specify whether three or four tiles can be placed next to each other on the page. In the case of a three-column page layout, you can also display a search area and/or a random gallery of assets.

Search area and random gallery

With a three-column page layout, you can display a search area and/or a random gallery of media objects. You can use the search area to carry out a keyword search in the following modules:

- Job Manager
- Marketing Data Hub
- Marketing Shop
- Media Pool
- Brand Template Builder

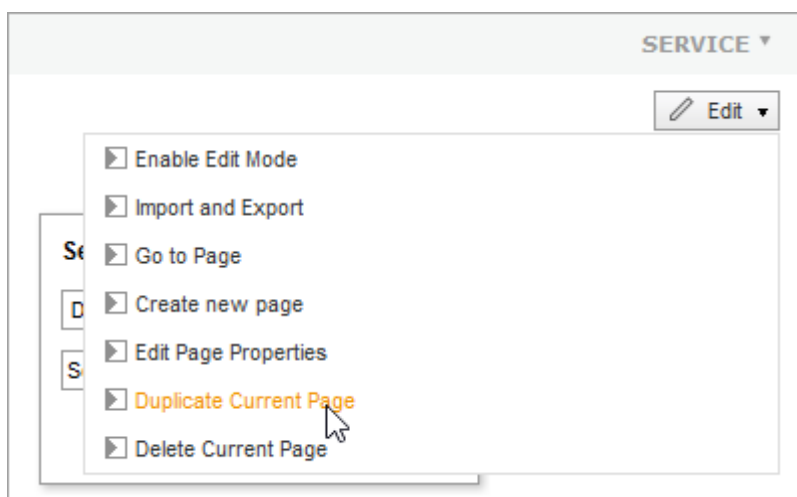
The random gallery displays assets that are available in the Media Pool. You can click a preview image to open the detailed view of the asset.

2 Editing functions

2.1 Functions for editing pages

You can access the following functions for editing pages by clicking the Edit button:

Function	Description
<i>Import and Export</i>	Note: To use this function, you must have the right MANAGE_ALL. You can export the page structure as an XML file and import an XML file.
<i>Go to page</i>	This opens a dialog box where you can select a page to which you want to switch.
<i>Create page</i>	This opens a new dialog box in which you can define the required page settings. Note: A page is visible only if an existing tile references it or the page is defined as the start page. However, if you define a new page as the start page, all of the other pages are invisible because they are linked to the new start page.
<i>Edit page options</i>	This opens a new dialog box in which you can edit the page options.
<i>Duplicate current page</i>	This creates a copy of the current page. You can edit the copied page options.
<i>Delete current page</i>	This deletes the page.



2.1.1 Page options

In the page options, you can define the internal name, the heading and the layout of the page, among others. Choose *Edit page options*.

Name	Description
<i>Internal name</i>	Enter the internal name of the page. The internal name must not contain special characters. Note: The internal name is visible in edit mode. The ID for the page is included in brackets.
<i>Heading</i>	Enter the heading for the page.
<i>Text</i>	Enter a text that is displayed below the headline.
<i>Layout</i>	Specify the number of columns: <ul style="list-style-type: none"> <i>3_columns</i>: You can place up to three tiles next to each other on the page. You can also display a search field and/or the random gallery. <i>4_columns</i>: You can place up to four tiles next to each other on the page. The search field and random gallery cannot be displayed.
<i>Start page</i>	Define the page as the start page for Smart Access. You can activate the checkbox only on a page that is not currently defined as the start page. On the current start page, the checkbox is displayed as grayed-out and read-only. Note: If you define a new page as the start page, all of the other pages are invisible because they are linked to the new start page.

If you want to create translations for the *Headline* and *Subline* fields, click *Edit all languages*.

The screenshot shows the 'Edit page' dialog box with the following fields and options:

- Internal name ***: Text input field containing 'Advertising material'.
- Headline**: Text input field containing 'Advertising Media Catalogue'. To its right is a checkbox labeled 'Edit all languages'.
- Subline**: Text input field (empty). To its right is a checkbox labeled 'Edit all languages'.
- Layout ***: Dropdown menu showing '3_columns'.
- Start page**: Checkbox (unchecked).
- Page Options**:
 - Checkbox 'Show search field' (unchecked).
 - Checkbox 'Show random gallery' (unchecked).

At the bottom right, there are 'Cancel' and 'Save' buttons.

2.2 Activating edit mode

To make changes to tiles and placeholders, you must activate edit mode via the *Edit* button.

Prerequisites:

- You have the right `MANAGE_OWN`, which allows you to edit tiles that are visible to you.
- You have the right `MANAGE_ALL`, which allows you to edit all tiles (even tiles that are not visible to you).

Note: Mandatory fields are marked with *.

Activating edit mode

1. Go to the Smart Access module start page.
2. Click > *Edit* > *Activate edit mode*.

You have activated edit mode.




2.3 Functions for editing tiles

After you have added a tile to a page, you can edit the tile properties or place the tile on the page using drag and drop.

Prerequisites:

- You have activated edit mode.
- You have the right `MANAGE_OWN`, which allows you to edit tiles that are visible to you.
- You have the right `MANAGE_ALL`, which allows you to edit all tiles (even tiles that are not visible to you).

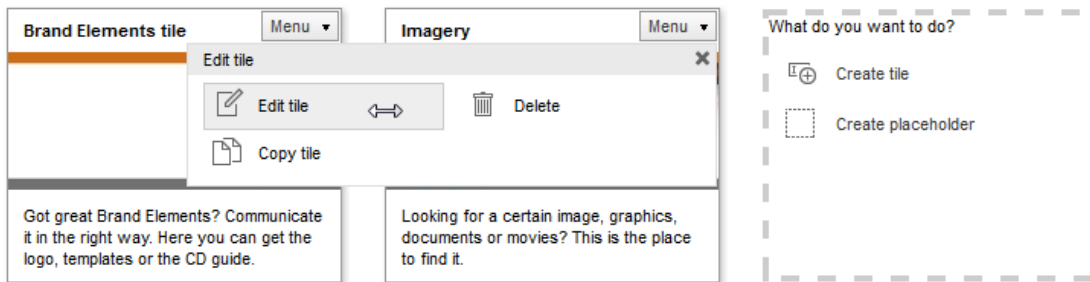
Menu button functions

Icon	Description
	<i>Edit tile:</i> This opens the <i>Edit tile</i> dialog box, in which you can edit the properties of the tile.
	<i>Copy tile:</i> This opens the <i>Copy tile</i> dialog box, in which you can change the properties of the copied tile and save it as a new tile.
	<i>Delete:</i> You can delete the tile.

The area *What do you want to do?*

Icon	Description
	<i>Create tile:</i> You can create a new tile on the page.
	<i>Create placeholder:</i> You can create an "invisible" tile on the page. You can use a placeholder to create free space between two tiles or to organize tiles, for example.

Startseite (ID-1)



2.3.1 Tile properties

In the tile properties, you can define the name, description text, and destination for the tile, among others. You can access the tile properties in the following ways:

- In the *What do you want to do?* area, choose *Create tile* to create a new tile and edit the tile properties.
- Click > *Menu* > *Edit tile* to edit the properties of an existing tile.
- Click > *Menu* > *Copy tile* to copy an existing tile and change the properties of the tile.

Name	Description
<i>Name</i>	Enter a name for the tile. The name is displayed as the headline. Note: The tile name is truncated ("...") if it cannot be displayed in full. With the font type <i>Arial</i> , this is the case if it is longer than 23 characters. The full tile name is displayed in a tooltip.
<i>Description</i>	Enter a description text for the tile. The text is displayed in the lower area of the tile.
<i>Tooltip</i>	If required, enter additional information that is then displayed when you move the mouse over the tile.

Name	Description
<i>Image</i>	<p>Add an image to the tile. You can:</p> <ul style="list-style-type: none"> <i>Upload new asset</i>: You can select either a locally saved image or an asset from your own collection. <p>Note: The dimensions of the preview image should be 218 x 90 pixels. Images in other sizes are scaled proportionally.</p> <p>Note: For this function, you require the right UPLOAD_OWN_PICTURES in the Brand Template Builder module.</p> <ul style="list-style-type: none"> <i>Select from Media Pool</i>: This opens a Media Pool search in which you can search for an existing asset. <p>To remove a preview image, choose <i>Remove asset</i> from the button below the preview image.</p>
<i>Destination module</i>	Select the module to which you want the tile to link.
<i>Destination type</i>	Specify the type of link (a search, for example).

If you want to use translations for the fields *Name*, *Description*, *Image tooltip*, and *Image* or use other images for different languages, click *Edit all languages*.


Use the parameters *Destination module* and *Destination type* to define which modules and content the user can reach by clicking the tile. Refer to the chapter Destination modules and destination types page 10 for more information about the exact settings for these parameters.

Edit tile

Name * Edit all languages

Description Edit all languages

Image tooltip Edit all languages

Image:  Upload new media
 Select from Media Pool
 Edit all languages

Destination module * ▼

Destination type * ▼

3 Parameters

You use parameters to control two tile properties:

- You can specify which destination and which content users access when they click the tile. See the chapter *Configuring destination modules and destination types* page 10.
- You can specify who can view the tile. See the chapter *Visibilities for a tile* page 23.

3.1 Configuring destination modules and destination types

To configure which destination and which content the user reaches by clicking a tile, define the *Destination module* and *Destination type*. By adding one or more *parameters*, you can, for example, define search terms or provide a direct link to a specific template in Brand Template Builder.

Configuring the destination module and destination type

1. Select a destination module and destination type.
2. Choose *Add* in the *Parameters* area.
3. The *Create parameter* area is displayed.
4. Modify the displayed fields. The fields displayed are determined by the settings that you make in the *Destination module* and *Destination type* fields. For more information, see the chapters below.
5. Click *Save*.
6. If required, repeat steps 2 to 5 to create more parameters.

You have configured the destination and the accessible content.

The screenshot shows a configuration window with the following elements:

- Destination module ***: A dropdown menu with "Media Pool" selected.
- Destination type ***: A dropdown menu with "AdvancedSearch" selected.
- Parameters**: A section containing a "Create parameter" sub-section.
- Create parameter**: A form with a "Type" dropdown set to "Parameter" and a "Parameter name *" dropdown. The dropdown menu is open, showing options: "Please choose parameter name...", "Please choose parameter name..." (highlighted), "All sub associations", "Approve", "Item number", "Affiliate ID", and "Colorspace type".
- Buttons**: "Cancel" and "Save" buttons are located at the bottom right of the "Create parameter" section.

Combining multiple parameters

You can combine several parameters for a tile with each other in order to, for example, create complex search requests. However, you can use a parameter name only once for each tile. A parameter that is already in use is no longer provided for selection when you add an additional parameter.

3.1.1 The Smart Access destination module

Select *Destination module* = *Smart Access* so that users open a different Smart Access page or an external web page when they click the tile.

The Smart Access destination type

To create a link to a different Smart Access page, select the destination module *Smart Access* and the destination type *Smart Access* for the tile. Select an existing page to be linked to the tile.

Field	Description
<i>Parameter name</i>	Select the entry <i>Page name</i> from the dropdown list.
<i>Value</i>	Choose <i>Select page</i> to select the Smart Access page to which the tile is to link in the dialog box that opens.

The External URL destination type

To create a link to an external web page, select the destination module *Smart Access* and the destination type *External URL* for the tile. Define the external URL using the following parameters:

Hint: If you link to an external http page and a user clicks on the tile in Firefox, the browser will display a warning message. However, the user can follow the link unrestricted.

Field	Description
<i>Parameter name</i>	<p>From the dropdown list, select:</p> <ul style="list-style-type: none"> • <i>Page name</i>: This creates a link to an external web page. When users click the tile, they leave the Marketing Efficiency Cloud. • <i>Content page name</i>: This connects an external web page using an iframe. When you click the tile, the external Web page is opened like a new Smart Access page. You can define the dimensions in the Dimensions area.
<i>Value</i>	Enter the full (including "https://...") address (URL) of the Web page to which you want the tile to link.
<i>Target page</i>	<p>Note: Visible only when the parameter name = <i>Page name</i>.</p> <p>Activate the checkbox <i>Open page in a new window</i> to call the external URL using the target attribute "_blank". Regardless of the Web browser settings, the link opens in a new window or new tab.</p>
<i>Page options</i>	<p>Note: Visible only when the parameter name = <i>Mount page</i>.</p> <p>Activate the checkbox <i>Show search field</i> to display a search field in the right-hand area of the new page.</p> <p>Activate the checkbox <i>Show random gallery</i> to display a random gallery for assets in the right-hand area of the new page.</p>
<i>Dimensions</i>	<p>Note: Visible only when the parameter name = <i>Mount page</i>.</p> <p>Define the size (in pixels) for the linked page.</p>

Parameters

Edit parameter

Type *

Parameter name *

Target page Open page in a new window

Value *

3.1.2 Marketing Shop destination module

Select *Destination module* = *Marketing Shop* so that users trigger a Shop search, open a Marketing Shop page, or open the detailed view of a specific item when they click the tile.

Search destination type

When you select this destination type, the user triggers a search in the Marketing Shop by clicking the tile. In the *Parameter name* field, select the search type and define the search criteria in the *Value* field:

Search criterion	Description
<i>Shop - Global search term</i>	Define a search term as the search criterion.
<i>Shop - Item number</i>	Enter an item number as the search criterion. Note: Items with item numbers containing the entered search criterion are also found.

Link destination type

When you select this destination type, the user switches to a Marketing Shop page, such as a theme page, for example.

Name	Description
<i>Page name</i>	Enter the part of the URL that is relevant for the Marketing Shop (usually beginning with ".../shop/...") for the desired Marketing Shop page.

Product destination type

When you select this destination type, the user opens an item. Define the product ID for the item in the *Value* field and define the following in the *Target* field:

Name	Description
<i>Rating</i>	The user opens the ratings function for the item.
<i>Details</i>	The user opens the detailed view for the item.

You use the URL of the item to receive the product ID. You can access the URL when you edit the item on the *Basic data* tab. The section *product_id=* is part of the URL. The subsequent number is the product ID. To view the URL, you require the relevant authorizations. If you have any questions, please contact your system administrator.

3.1.3 Media Pool destination module

Select *Destination module* = *Media Pool* so that users open an asset or trigger an advanced search in the Media Pool when they click the tile.

Note: The authorizations that the user has determine which assets are displayed in the hit list.

Asset destination type

With the *Asset* destination type, the user opens an asset. In the *Parameter name* field, select the entry *Link asset (Asset ID)*. In the *Value* field, enter the asset ID of the asset. In the *Target* field, choose how the user can access the asset:

Selection in the <i>Target</i> field	Description
<i>Details</i>	The user opens the detailed view for the asset.
<i>Download</i>	The user opens the <i>Asset download</i> dialog box and can download the asset directly.
<i>E-mail</i>	The user opens the <i>Asset download</i> dialog box and can send the selected asset by e-mail.

Search destination type

When you choose the *Search* destination type, the user triggers an advanced search by clicking the tile. Perform a corresponding search in the Media Pool module. When the result of the search is displayed, copy the URL. In Smart Access, configure a tile for the Media Pool with the *Search* destination type. In the *Parameter name* field, select the entry *Search URL*. Copy the URL to the *Value* field.

Search destination type based on public filters

When you choose this destination type, the user triggers a search that is saved as a public filter by clicking the tile. As a Smart Access administrator, you can select the filter that you created in the Media Pool module when creating the file.

In the *Parameter name* field, select the entry *Saved filters*. Then, select one of your filters in the *Value* field.

Advanced Search destination type

When you choose this destination type, the user triggers an advanced search by clicking the tile. You can specify the search criteria in the *Parameter name* field. Enter the search criterion in the *Value* field. When you make multiple entries, choose whether the asset has to have all of the search criteria (*Match all*) or at least one criterion (*Match one*) in the *Comparator* field. To create multiple search criteria, create multiple parameters (for example, one parameter with the search criterion *Category* and one with the search criterion *All sub associations*).

Search criteria	Result of the tile being clicked
<i>All sub associations</i>	Use this parameter together with the search for categories and specify whether the search in sub-categories is to be activated. Select <i>true</i> as the value.
<i>Assets to release</i>	You can define a search based on the <i>Approval required</i> asset property. As the <i>Value</i> , select: <ul style="list-style-type: none"> • <i>0</i>: This displays assets that are not flagged as requiring approval. • <i>1</i>: This displays assets that are flagged as requiring approval.
<i>Item number</i>	The user opens assets with the item number that you enter in the <i>Value</i> field.
<i>Affiliate ID</i>	The user opens assets with the affiliate ID that you enter in the <i>Value</i> field.
<i>Color space</i>	The user opens assets with the color space that you select in the <i>Value</i> field (<i>CMYK, RGB, or Gray scale</i>).
<i>Thumbnail view</i>	The user opens the Media Pool start page. As the value, select: <ul style="list-style-type: none"> • <i>True</i>: The hit list is displayed in a thumbnail view. • <i>False</i>: The hit list is displayed in a list view.
<i>Creator name</i>	The user opens assets that are owned by the user that you select in the <i>Value</i> field.
<i>File size</i>	The user opens assets with a file size that matches the comparison that you enter in the fields <i>Comparator</i> (<i>Equal, Less than, Greater than, Less than or equal to, Greater than or equal to</i>) and <i>Value</i> (in kilobytes).
<i>Free text fields</i>	In the module-specific configuration area in the Marketing Efficiency Cloud, you create up to 20 free text fields and use them in the properties of assets. You can select a free text field as a search criterion and search for specific text field content or for the values of free text fields that have been created as picklists.
<i>Global search</i>	The user opens assets with properties that contain the search word that you enter in the <i>Value</i> field.
<i>Creation date</i>	The user opens assets with a creation date that matches the comparison that you enter in the fields <i>Comparator</i> (<i>Equal, Less than, Greater than, Less than or equal to, Greater than or equal to</i>) and <i>Value</i> .

Search criteria	Result of the tile being clicked
<i>Tag</i>	The user opens assets to which the tag that you enter in the <i>Value</i> field is assigned. Note: You can enter multiple tags separated by a comma to create an AND query. Assets must then have all of the entered tags.
<i>Keywords</i>	The user opens assets to which the keywords that you select in the <i>Value</i> field are assigned. In the same dialog box, you specify whether the assets should be assigned to all of or only one of the selected keywords.
<i>License</i>	The user opens assets either with or without licenses. In the <i>Value</i> field, select: <i>1</i> : The user finds assets that require a license. <i>0</i> : The user finds all assets that are not assigned with a license.
<i>License holder</i>	The user opens assets to which the license type that you select in the <i>Value</i> field are assigned.
<i>License name</i>	The user opens assets to which the <i>license information (license)</i> that you select in the <i>Value</i> field are assigned.
<i>License validity starts after</i>	The user opens assets with a license validity that starts after the date that you enter in the <i>Value</i> field.
<i>License validity ends before</i>	The user opens assets with a license validity that ends before the date that you enter in the <i>Value</i> field.
<i>Asset ID</i>	The user opens the asset with the asset ID that you enter in the <i>Value</i> field.
<i>Asset name</i>	The user opens the asset with the asset title that you enter in the <i>Value</i> field.
<i>Asset validity starts after</i>	The user opens assets with a validity that starts after the date that you enter in the <i>Value</i> field.
<i>Asset validity ends before</i>	The user opens assets with a validity that ends before the date that you enter in the <i>Value</i> field.
<i>Find exact spelling</i>	Use this parameter together with a parameter with the <i>Asset title</i> parameter name to define that the checkbox <i>Find exact spelling</i> is activated for the Media Pool search. Select <i>True</i> as the value.
<i>Person(s) shown</i>	The user opens assets in which the <i>Person(s) shown</i> attribute contains the person that you enter in the <i>Value</i> field.

Search criteria	Result of the tile being clicked
<i>Suffix</i>	<p>The user opens assets with the file format that you select in the <i>Value</i> field.</p> <p>Note: The file format must be flagged as <i>Officially supported</i>.</p>
<i>Categories</i>	<p>The user opens assets with a category that matches the comparison that you enter in the <i>Comparator</i> and <i>Value</i> fields. Enter the category in the <i>Value</i> field. In the <i>Comparator</i> field, choose whether the assets have to be assigned with all (<i>Match all</i>) or at least one (<i>Match one</i>) of the entered categories.</p> <p>Note: Sub-categories are not included in the search. Create a second parameter with the <i>All sub associations</i> parameter name to include sub-categories in the search.</p>
<i>Internal usage</i>	<p>As the <i>Value</i>, select:</p> <ul style="list-style-type: none"> • <i>True</i>: The user opens assets that require a license and have the purpose of use <i>Internal</i>.
<i>External usage</i>	<p>As the <i>Value</i>, select:</p> <ul style="list-style-type: none"> • <i>True</i>: The user opens assets that require a license and have the purpose of use <i>External</i>.
<i>Usage in print</i>	<p>As the <i>Value</i>, select:</p> <ul style="list-style-type: none"> • <i>True</i>: The user opens assets that require a license and have the purpose of use <i>Print</i>.
<i>Usage as an online asset</i>	<p>As the <i>Value</i>, select:</p> <ul style="list-style-type: none"> • <i>True</i>: The user opens assets that require a license and have the purpose of use <i>Online</i>.
<i>Virtual database</i>	<p>The user opens assets that are stored in one of the VDBs that you select in the <i>Value</i> field. Note that the user can access the assets only if he or she has access to the VDBs.</p>
<i>Asset size</i>	<p>The user opens assets that match the size that you enter in the <i>Comparator</i>, <i>Width</i>, <i>Height</i>, and <i>Unit</i> fields.</p>

3.1.4 Brand Template Builder destination module

Select *Destination module = Brand Template Builder* so that the user triggers a search for a template in Brand Template Builder or can customize a template predefined by you when he or she clicks the template.

Note: To open or create a template or document, the appropriate authorizations are required.

AdvertTemplateSearch destination type

When you select this destination type, the user triggers a search for templates by clicking the tile. Use the *Parameter name* field to define the following search criteria:

Note: You can also use the parameter name *With details* for the search in order to display the details search in the hit list. The details search is hidden by default.

Search criterion	Search results after clicking the tile
<i>Just valid</i>	The user opens templates that are currently valid. Select <i>true</i> as the value.
<i>Categories</i>	The user opens templates to which the categorie entered in the <i>Value</i> field or one of its sub-categories is assigned.
<i>All sub associations</i>	You can use this search criterion together with the search for categories and specify that the search in sub-categories is to be deactivated. Select <i>False</i> as the value.
<i>Item number</i>	The user opens the template with the item number that you enter in the <i>Value</i> field.
<i>Template ID</i>	The user opens templates with the template ID that you enter in the <i>Value</i> field.
<i>Tags</i>	The user opens templates to which the tag entered in the <i>Value</i> field is assigned.
<i>Color</i>	The user opens templates to which the color selected in the <i>Value</i> field is assigned. Note: The colors that can be selected are made available centrally using a custom structure or its custom objects.
<i>Output method</i>	The user opens templates to which the output method selected in the <i>Value</i> field is assigned. Note: The output methods that can be selected are available throughout the system.

Search criterion	Search results after clicking the tile
<i>Height</i>	The user opens templates in Brand Template Builder with the height entered in the <i>Value</i> field. The search also finds templates that can be scaled to the specified dimension.
<i>Width</i>	The user opens templates with the width entered in the <i>Value</i> field. The search also finds templates that can be scaled to the specified dimension.
<i>Format</i>	The user opens templates to which the format selected in the <i>Value</i> field is assigned. Note: The formats that can be selected are made available centrally using a custom structure or its custom objects.
<i>Global search term</i>	The user opens templates with properties in which the keyword entered in the <i>Value</i> field can be found. The entered search term is searched for in several fields or document properties at the same time.
<i>Name</i>	The user opens the template with the name entered in the <i>Value</i> field.
<i>Valid from</i>	The user opens templates that are valid from the date entered in the <i>Value</i> field. Use this parameter together with a parameter of the same destination type and the search criterion <i>Valid to</i> to find templates that are valid within a specific time period.
<i>Valid to</i>	The user opens templates that are valid up to the date entered in the <i>Value</i> field. Use this parameter together with a parameter of the same destination type and the search criterion <i>Valid from</i> to find templates that are valid within a specific time period.
<i>With details</i>	Create a parameter with this search criterion to display the details search in the hit list. The details search is hidden by default.
<i>Virtual database</i>	The user opens templates to which one of the virtual databases (VDBs) selected in the <i>Value</i> field is assigned.

Individualization

When you select this destination type, the document editor, in which the user can create a document, is opened directly after the user clicks the tile.

Name	Description
<i>Template ID</i>	The user opens the document editor together with the template with the ID entered in the <i>Value</i> field.

3.1.5 The Job Manager destination module

Select *Destination module = Job Manager* to grant the following access capabilities to the user:

- The user can open the Job Manager start page.
- The user can create a new job.
- The user can edit an existing job.
- The user can search for a job.

Note: To create or open a job, you must have the appropriate authorizations.

Welcome page destination type

When you select this destination type, the user opens the Job Manager start page by clicking the tile. You can change only the visibility of the tile (see the chapter *Visibilities of a tile* page 23).

Job destination type

When you select this destination type, the user either opens an existing job or creates a new job by clicking the tile. You use the *Parameter name* field to choose which action is performed:

Name	Action when the tile is clicked
<i>Job type</i>	The user creates a new job based on the job type that you select in the <i>Value</i> field.
<i>Job ID</i>	The user opens the job with the ID that you enter in the <i>Value</i> field.

Note: Please note that the *Job name* parameter name does not have a function at present.

Search destination type

When you select this destination type, the user triggers a search in the Job Manager by clicking the tile. Use the *Parameter name* field to define the following search criteria:

Search criterion	Search results
<i>Global search term</i>	The user opens jobs and sub-jobs with properties that contain the search word entered in the <i>Value</i> field.
<i>Job filter name</i>	The user opens jobs and sub-jobs that can be found using the standard filter selected in the <i>Value</i> field (<i>Jobs I participate in, My archive, My jobs, All jobs, or Archive</i>).

3.1.6 The Marketing Data Hub destination module

Select *Destination module = Marketing Data Hub* to grant the following access capabilities to the user:

- The user can open the Marketing Data Hub start page.
- The user can search for a data object.

Note: To open a data sheet, you must have the appropriate authorizations.

Welcome page destination type

When you select this destination type, the user opens the Marketing Data Hub start page by clicking the tile. You can change only the visibility of the tile (see the chapter *Visibilities of a tile* page 23).

Data object destination type

Note: Please note that the *Data object* destination type does not have a function at present.

Search destination type

When you select this destination type, the user triggers a search in Marketing Data Hub by clicking the tile. Use the *Parameter name* field to define the following search criteria:

Search criterion	Search results
<i>Global search term</i>	The user opens data objects and sub data objects with properties that contain the search word entered in the <i>Value</i> field.

3.1.7 The Marketing Planner destination module

Select *Destination module = Marketing Planner* so that the user opens the Marketing Planner by clicking the tile.

Last visited page destination type

When you select this destination type, the user opens the Marketing Planner page the user last visited by clicking the tile. You can change the visibility of the tile (see the chapter *Visibilities of a tile* page 23), but you cannot define any additional parameters.

Public views on the calendar page destination type

When you select this destination type, the user opens the Marketing Planner calendar start page by clicking the tile. The planning elements are displayed filtered according to the public view that you specify in Smart Access. In the *Parameter name* field, select the entry *Public views*. Select one of the public views in the *Value* field.

Public views of the budget page destination type

When you select this destination type, the user opens the Marketing Planner budget view by clicking the tile. You have the option of linking to either a public filter view or a published budget column set.

If you choose *Public views on budget page*, the planning elements are filtered according to the public view you specify in Smart Access. In the *Parameter Name* field, choose *Public Filter View*. In the *Value* field, select one of the published views.

When you select *Public budget column set*, the budget displays the budget data defined by the set. In the *Parameter Name* field, choose *Public budget column set*. In the *Value* field, choose one of the published sets.

Subpages destination type

By selecting this destination type, the user opens the Marketing Planner subpage by clicking the tile. In the *Parameter name* field, select the entry *Subpage*. Choose one of the following pages in the *Value* field:

- Dashboard
- Calendar
- Budget view
- Reports
- Tools
- Settings
- Approvals
- User

You can change the visibility of the tile (see the chapter *Visibilities of a tile* page 23).

3.1.8 Reporting Center destination module

Select *Destination module* = Reporting Center to grant the following access capabilities to the user:

- The user opens the Reporting Center start page.
- The user opens a subpage in the Reporting Center.

Welcome page destination type

When you select this destination type, the user opens the Reporting Center start page by clicking the tile. You can change the visibility of the tile (see the chapter *Visibilities of a tile* page 23), but cannot define any additional parameters.

Page destination type

When you select this destination type, the user opens a subpage in the Reporting Center by clicking the tile. Enter the URL for the subpage as the parameter:

Name	Description
<i>Page URL</i>	Enter the URL for the desired Reporting Center page.

3.2 Restricting the visibility of a tile

To ensure that the actions that you configure for a tile are not available to all users, you can restrict the visibility of the tile.

Restricting the visibility of a tile

1. In the *Create tile* or *Edit tile* dialog box, choose *Add* in the *Parameters* area.
2. In the *Type* field, select the entry *Visibility*.
3. Select an entry in the *Visibility* field. The entries are described below.
4. In the *Create parameter* area, choose *Save*.

You have restricted the visibility of the tile.

The *Visibility* field contains the following entries:

Entry	Description
<i>Virtual database group</i>	Select one or more VDB groups by activating the checkboxes. Users who have access to at least one of the selected VDB groups can see the tile.
<i>Organizational unit</i>	Select one or more organizational units by activating the checkboxes. Users that belong to at least one of the selected organizational units can see the tile.
<i>Right name</i>	Select one or more rights from the dropdown list. Users who have at least one of the selected rights can see the tile.

The screenshot shows the 'Edit parameter' dialog box. The 'Type' dropdown is set to 'Visibility'. The 'Access right' dropdown is open, showing a list of options: 'Please select visibility type...', 'Virtual database group', 'Organizational unit', and 'Right name'. The 'Virtual database group' option is currently selected. There are 'Cancel' and 'Save' buttons at the bottom right of the dialog.

4 Examples

4.1 Configuring the page structure

You want to create a page structure consisting of several pages. You want to define the page *Marketing material* as the start page. On the start page, you want to place two tiles: you want one tile to provide a link to the page *Advertising material catalog*. You want users to be able to carry out an advanced search in the Media Pool using the other tile. You want to define the validity date from which the assets are to be valid as a search criterion.

Prerequisites:

- You have the right `MANAGE_ALL` or the right `MANAGE_OWN`.

Step by step:

1. In Smart Access, click `> Service > Activate edit mode`.

This activates edit mode, and you can now call the necessary functions using the *Service* button.

2. Click `> Service > Create new page`.

This opens the *Create page* dialog box.

3. Enter *Marketing material* in the input fields *Internal name* and *Headline*.

4. Optional: Enter a description in the *Text* input field.

5. From the *Layout* selection list, select the entry `3_columns`.

The *Page Options* area is displayed.

6. Optional: Activate the checkboxes *Show search field* and *Show random gallery*.

7. Activate the *Start page* checkbox.

8. Optional: Click *Edit all languages* to define the language versions required.

9. Click *Save*.

The *Marketing material* page has been created and is defined as the start page.

10. Click `> Service > Create new page`.

This opens the *Create page* dialog box.

11. Enter *Advertising material catalog* in the input fields *Internal name* and *Headline*.

12. Optional: Enter a description in the *Text* input field.

13. From the *Layout* selection list, select the entry `3_columns`.

The *Page Options* area is displayed.

Note: You can also use a four-column layout.

14. Optional: Activate the *Show search field* and *Show random gallery* checkboxes.

15. Optional: Click *Edit all languages* to define the language versions required.

16. Click *Save*.

The *Advertising material catalog* page has been created. An info message informs you that the page is still invisible because no tile providing a link to it exists.

17. Click > *Service* > *Go to page*.

This opens a new dialog box.

18. Select the page *Marketing material*.

19. Click > *Service* > *Go to page*.

This brings you to the *Marketing material* page.

Note: Alternatively, you can also navigate using the breadcrumb trail in the upper area of the screen.

20. In the area *What do you want to do?*, choose *Create tile*.

The *Create tile* dialog box opens.

21. Enter the required information, such as the name and description, in the input fields and load a preview image for the tile if you require one.

22. From the *Destination module* dropdown list, select the entry *Smart Access*.

23. From the *Destination type* dropdown list, select the entry *Smart Access*.

This activates edit mode in the *Parameters* area.

24. Choose *Add* in the *Parameters* area.

This activates edit mode.

25. From the *Type* dropdown list, select the entry *Parameter*.

26. From the *Parameter name* dropdown list, select the entry *Page name*.

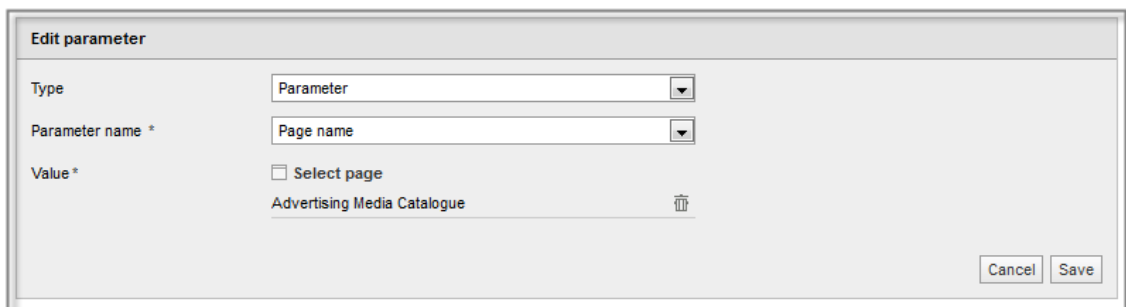
27. Click *Select page*.

This opens the *Assign page* dialog box.

28. Select the page *Advertising material catalog*.

29. Choose *Assign page*.

The *Advertising material catalog* page is now assigned to the tile.



The screenshot shows the 'Edit parameter' dialog box. It has a title bar 'Edit parameter'. Below the title bar, there are three main sections: 'Type' with a dropdown menu set to 'Parameter'; 'Parameter name *' with a dropdown menu set to 'Page name'; and 'Value *' with a checkbox 'Select page' and a list item 'Advertising Media Catalogue' with a trash icon. At the bottom right, there are 'Cancel' and 'Save' buttons.

30. In the *Parameters* area, choose *Save*.

This ends edit mode.

31. Click *Save*.

The *Edit tile* dialog box closes. The tile now provides a link to the *Advertising material page*.

32. In the area *What do you want to do?*, choose *Create tile*.

The *Create tile* dialog box opens.

33. Enter the required information, such as the name and description, in the input fields and load a preview image for the tile if you require one.

34. From the *Destination module* dropdown list, select the entry *Media Pool*.

35. From the *Destination type* dropdown list, select the entry *AdvancedSearch*.

This activates edit mode in the *Parameters* area.

36. Choose *Add* in the *Parameters* area.

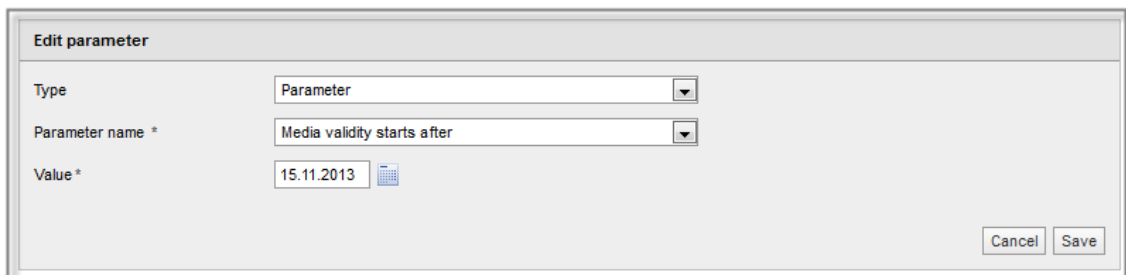
This activates edit mode.

37. From the *Type* dropdown list, select the entry *Parameter*.

38. From the *Parameter name* dropdown list, select the entry *Asset validity starts after*.

The *Value* area is displayed.

39. Use the date picker to choose the date from which the assets should be valid (for example, *November 15, 2013*).



40. In the *Create parameter* area, choose *Save*.

This ends edit mode.

41. Click *Save*.

The *Edit tile* dialog box closes. An advanced search in the Media Pool using the specified validity date as the search criterion is called from the tile.

4.2 Displaying a Search Field and Random Gallery

You want to display a search field and random gallery for assets on the right-hand side of a Smart Access page.

Prerequisites:

- You have the right `MANAGE_OWN` or the right `MANAGE_ALL`.
- You are using a three-column page layout.

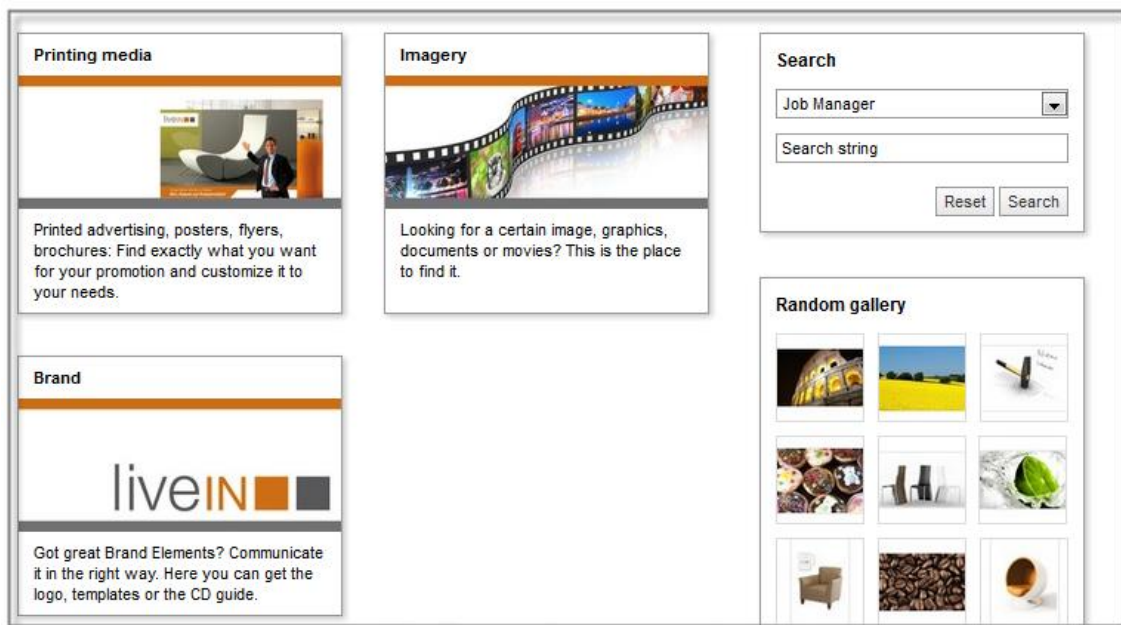
Step by step:

1. Click *> Service > Activate edit mode*.
2. Click *> Service > Edit page options*.

This opens a new dialog box.

3. From the *Layout* selection list, select the entry *3_columns*.
4. In the *Page Options* area, activate the *Show search field* and *Show random gallery* checkboxes.
5. Click *Save*.

The search field and random gallery for assets are displayed on the right-hand side of the Smart Access page.



4.3 Restricting the visibility of a tile

You want to restrict the visibility of the *Advertising material catalog* tile. You want to specify that the tile is visible only to users who belong to either the organizational unit *Marketing* or the organizational unit *Sales*.

Prerequisites:

- You have the right `MANAGE_OWN` or the right `MANAGE_ALL`.
- The *Marketing* and *Sales* organizational units are available.

Step by step:

1. Activate edit mode.
2. Click the *Menu* button for the *Advertising material catalog* tile and choose *Edit tile*.

This opens the *Edit tile* window.

3. Choose *Add* in the *Parameters* area.

The *Create parameter* area opens.

4. From the *Type* dropdown list, select the entry *Visibility*.
5. From the *Access right* dropdown list, select the entry *Organizational unit*.

The available organizational units are displayed.

6. Activate the checkboxes next to the entries *Marketing* and *Sales*.

The screenshot shows a 'Create parameter' dialog box with the following fields and values:

- Type:** Visibility
- Access right *:** Organizational unit
- Value *:** A list of organizational units with checkboxes:
 - BrandMaker
 - Marketing
 - ORG Unit General
 - Sales

7. In the *Create parameter* area, choose *Save*.

The parameter is displayed in the parameters box.

8. Click *Save*.

The *Edit tile* dialog box closes. The tile is visible only to users who belong to either the organizational unit *Marketing* or the organizational unit *Sales*.