Job Manager

User Manual

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1 About the Job Manager

The Job Manager is the module for order, project, and workflow management, which allows you to carry out procedures and processes efficiently and transparently.

In the Job Manager, you can use a job or process to map the creation process for your campaign, for example. You can store and group together all of the information relevant to your campaigns, such as quotations, responsibilities, concepts, or layouts, directly in the job. With the help of definable workflows, "project blueprints" can be created and used to map the individual phases and schedule. Furthermore, typical activities can be created as tasks and automatically assigned to a workflow step. This allows you to map the process precisely and in detail as required.

The Job Manager allows you to access other modules in the Marketing Efficiency Cloud:

- You can select an asset from the Media Pool for a job and add it to the job.
- You can start a review for a stored asset for greater transparency in your discussion processes.
- You can edit a Brand Template Builder document stored for the job and adapt it to your own requirements.
- You can start jobs for planning elements in the Marketing Planner.
- In the Marketing Shop module, you can order a service item that is performed as a job in the Job Manager.
- RESOURCE MANAGEMENT (see page 64) provides an overview of the workload of users executing tasks and jobs, and it provides optimized task distribution.

1.1 Useful information for getting started

This provides you with some tips and information that will help you to efficiently carry out tasks related to the Job Manager.

User categories

The access to and visibility of tabs and the field functions (variables) placed on them can be restricted when you configure the job type for each workflow step. For this, users are divided into the categories *Assignee/Processor*, *Creator*, *Other participants* and *Anonymous*. The user category to which you belong determines the datasheet tabs and variables that you can view or edit.

User	Description
Assignee/Processor	You are the (current) assignee/processor of the job if you are responsible for the current workflow step.
Creator	You are the creator (owner) of a job if you have created the job. The creator can be changed at a later stage.

User	Description
Participant	You are a participant if you were once the processor of the job or if you are invited to be a participant in the job. As a participant, you are not responsible for the current workflow step, but you can follow the progress of the job. Participants can be added to a discussion.
Anonymous	Anonymous users are any users who are not the creator, assignee/processor, or participant, but who can still access a job. In general, anonymous users only have read access to variables.

Job and process

A job or process collects all the information needed to complete a task, such as creating a new campaign. The difference between a job and process is the underlying workflow. Also, processes can only be viewed but not edited in the Kanban view.

Sub-Jobs/Processes

Additional required tasks can be mapped with sub-jobs/processes. A sub-job/process can use a different workflow that is independent of the parent element. Sub-jobs/processes provide a way to structure workflows and make dependencies between different workflows identifiable.

Workflows and tasks

A workflow consists of various *workflow steps*, and each workflow step is assigned to a user group. Any user group member can be selected as the person responsible for the workflow step. In addition, *tasks* can be added to each workflow step so that typical activities are created automatically when the job is created.

Datasheet

All of the information about a job or process is collected and mapped on a *datasheet*. Various information can be grouped together and displayed clearly on a number of tabs.

Variables

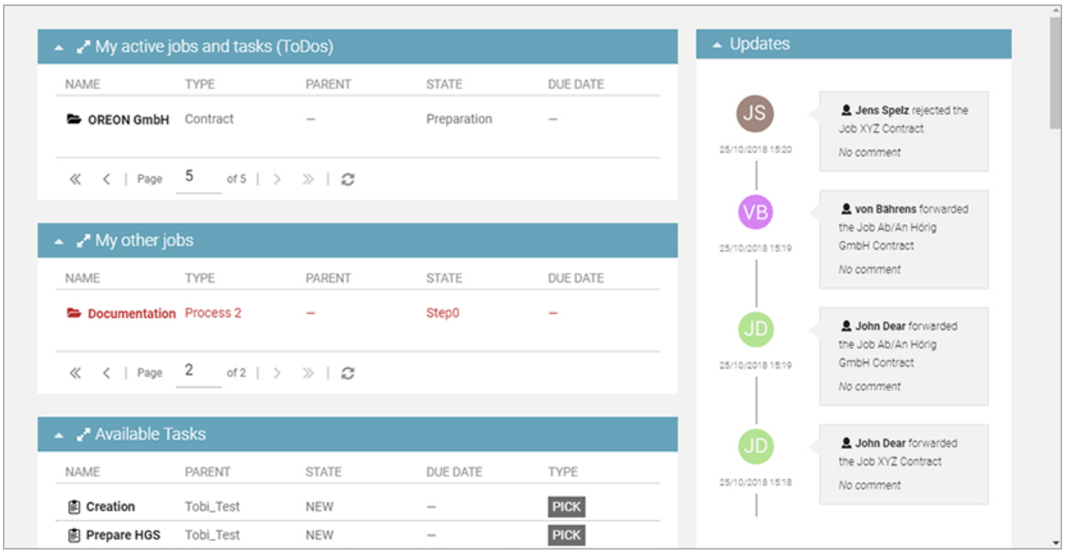
To ensure that all of the required information (e.g., for campaign planning) can be stored on the datasheet, a large number of *variables* (field functions) are available. The variables are defined and placed on the datasheet in the type configuration.

2 Dashboard

The dashboard provides you with an overview of your to-do list in the Job Manager and shows you six different areas:

- *My active jobs and tasks (ToDos):* This area lists all the jobs, tasks and processes that you must actively process and to which you are assigned as an assignee.
- *My other jobs:* This list shows all the jobs and processes that you are involved in. Each individual job and process is displayed in only one of the two views – either *My active jobs and tasks* or *My other jobs*.
- *Available jobs*: Jobs and processes are listed here to which no assignees are currently assigned. When you accept a job or a process, a dialog box opens where you can assign the job or process either to yourself or to a member of your group. The job or process is then displayed for the selected member in the first list *My active jobs*.
- *Available tasks*: This area lists the tasks to which no assignees are currently assigned. You can click a pushbutton to accept the tasks directly; you are then automatically entered as the assignee. The task then appears in the first list, *My active jobs*.
- *Jobs delegated to me*: In this area, jobs, tasks and processes are displayed for which you are the registered substitute of the assignee. In these jobs and processes, you perform the tasks for the delegating user that result from the role as assignee of a job or process. In return, you receive the rights of the delegating user.
  Note that the dashlet is not visible if there are no delegated jobs or processes.
- *Quick actions:* The user can use the quick actions to create jobs or processes of a specific type directly, provided this type has been configured accordingly. Use the *Start* Review button to create a job with a review attached.
- *Updates:* This area lists all the notifications and discussion points for the jobs and processes that are relevant to the user. Changes to reviews that were started in the job or process are also displayed here.

If you hover the mouse over a column title, a ▾ menu appears.
In this menu, you can show or hide the individual dashboard columns and sort them in ascending or descending order.



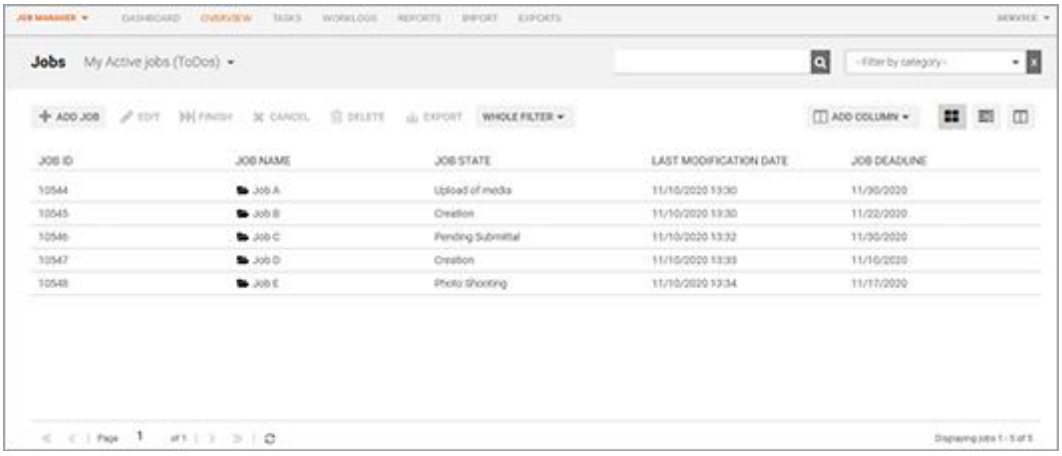
3 Overview

When you open the Job Manager, the overview opens as the home screen. This page provides a clearly arranged list of the jobs and processes. You can display jobs and processes that you can access using searches, filters, and various views.

Start

When you open the overview, your active jobs and tasks are displayed by default. You can also display the result of one of your own filters instead. See Example: SAVING AND PUBLISHING A SEARCH AS A FILTER; see page 16.

The overview displays the jobs in a table:



You can also display the jobs and processes in a Gantt chart or a Kanban view.

For a detailed description of the different views, see TABLE, GANTT CHART, AND KANBAN VIEW on page 9.

Filters and searches

You can use filters or search functions to restrict these job lists:

- *Filters*: You can use filters to restrict the overview based on predefined criteria. For more information see page 13.
- *Search*: You can use a simple search to search for jobs and processes in an existing filter view. For more information, see SIMPLE SEARCH on page 16.
- *Categories*: Instead of the simple search, you can also use categories to search for jobs and processes in an existing filter view. See CATEGORIES on page 17.
- *Advanced search*: Define complex search requests that you can save and use again as a filter. You can publish the filter and make it accessible to other users. See ADVANCED SEARCH on page 17.

3.1 Table, Gantt chart, and Kanban view

You can display the jobs in a table, Gantt chart, or a Kanban view. You can switch between the views using the following buttons:

- : Table
- : Gantt chart
- : Kanban view

Table: Quick access and comparison of details

The overview table allows you to view the most important information (such as the name, creator, state, and desired delivery date) at a glance. You can display additional required columns or hide columns that are not required. This feature gives you quick access to the details of the jobs and processes and lets you compare them.

If you want to perform an action on multiple jobs or processes, you can select jobs and processes in the table using the following shortcuts:

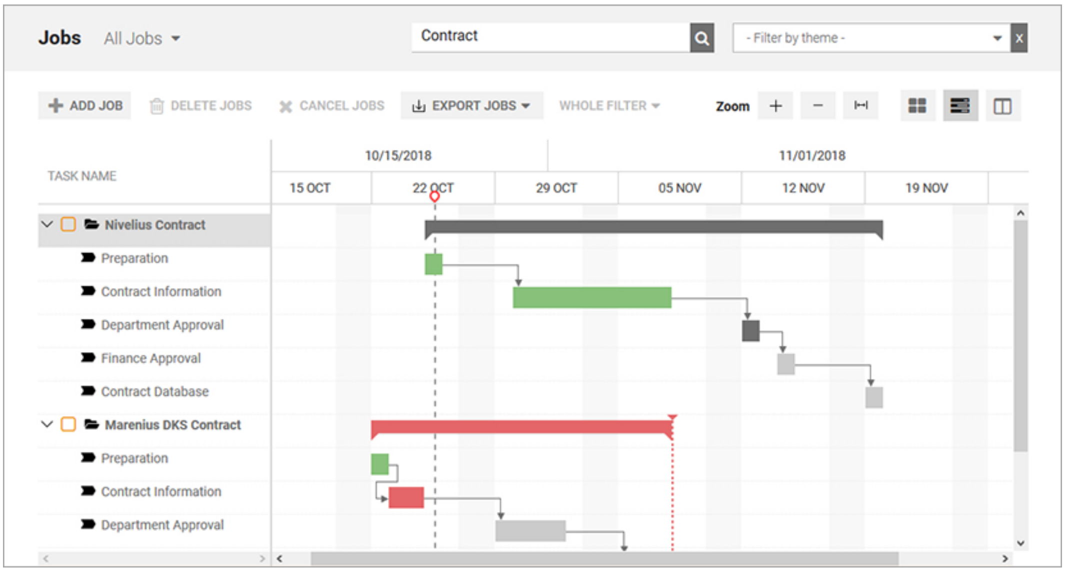
- Click while holding down the CTRL or CMD key: the clicked job or process is selected.
- Shift-click: The first and last clicked job or process and all jobs and processes in between are selected.

To learn how to change the display of the table, see chapter 3.1.1.

Gantt chart: Chronological progress and interdependencies

The Gantt chart lets you record chronological progress and the interdependencies between the workflow steps and tasks. The chart displays each workflow step as a bar. For the job or process, an aggregated bar of all the workflow steps is displayed for the job. The length of the bars is based on the plan that is entered on the *Workflow* tab in the datasheet. If there is no predefined time schedule, an across-the-board rate of one day per workflow step is assumed.
Workflow steps that have not begun yet are displayed in light gray; finished workflow steps are

displayed in green. A dark gray bar indicates the current workflow step, provided that it is still in the schedule. When a workflow step is overdue, it is displayed in red:



The desired completion date for a job is displayed with the following character:

To highlight jobs and processes that need to be processed urgently, you can prioritize the jobs and processes. That is, you can place the jobs or processes with the highest priority at the top of the list in this view using drag and drop. To do so, click in the left column *Task name* on an entry and hold down the mouse button. Drag the job or process down or up the list until it is in the desired position. A green checkmark on the mouse cursor shows you the positions where you can add it. The priority is saved and is also used for the Kanban view.

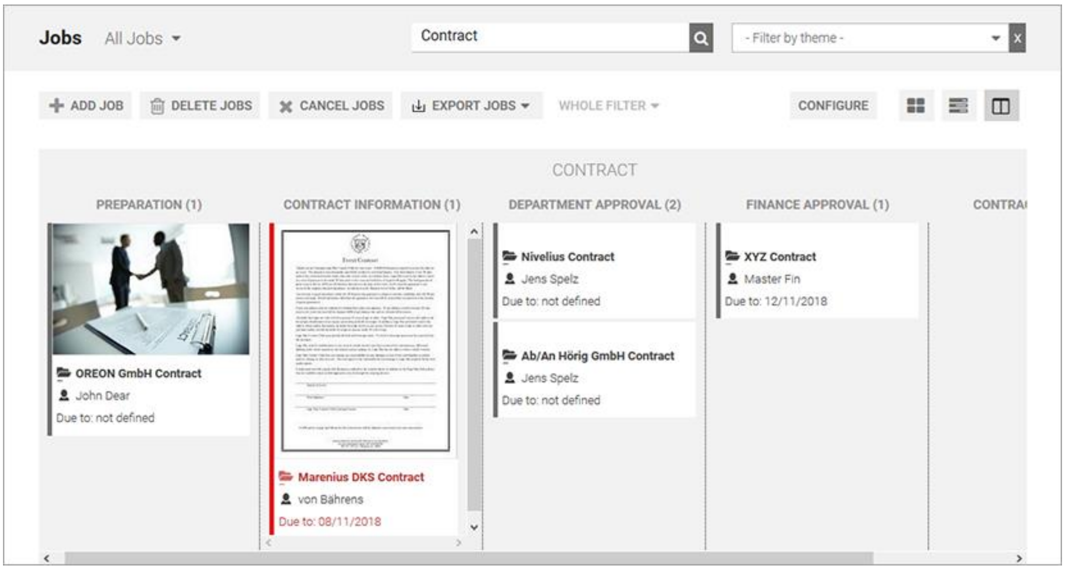
Note

In contrast to the table and the Kanban view, only active jobs can be displayed in the Gantt chart. It is not possible to display jobs in the status *Finished*, *Deleted* or *Cancelled*.

Kanban view: Pending tasks

The Kanban view lets you quickly identify the workflow steps that the jobs and processes are in. Each column corresponds to a workflow step. The jobs can simply be forwarded to the next workflow step using drag and drop. Note that processes in Kanban can only be displayed, but not edited. If the current view displays jobs or processes with different workflows, a separate Kanban board is displayed for each workflow and multiple boards are arranged next to one another.

If there are multiple jobs or processes in the same workflow step, they are sorted from top to bottom based on their priority. You can also change the priority here by sorting the jobs or processes in a column again using drag and drop. Note that if you move jobs to a different column, they are forwarded to its corresponding workflow.



You can configure the information displayed for the jobs or processes. See CONFIGURING KANBAN VIEW; see page 13.

3.1.1 Modifying a table

If you want to change the columns in the table, note that doing so may have different effects on the display with other filters depending on the filter type:

Filter used while making the change	Effect
Standard filter	The change is applied to all the standard filters. For public filters, the change is applied if the table for the filter was not changed previously.
Public filter	The change is applied only for the public filter. Future changes to the standard filter have no effects on the display with this public filter.
Private filter	The change is applied only for the private filter.

This applies to the selection of the displayed columns as well as the chosen column width.

Adding Columns

1. Select the filter for which you want to change the table. Note the descriptions above.

The overview is reloaded.

2. In the overview header, choose *Add column*.

A dropdown list where you can access all the available variables opens:

- *System*: You can select from the number of sub-jobs or -processes belonging to the job/process or the name of the parent job/process.
- *General*: You can select any of the variables that have been flagged as type independent.

Note: Variables can be flagged as type-independent in the type configuration.

- *All of the available job types*: By selecting a job type, you can flag the information (variables) that belongs to the job or process.

3. Click the variable that you want to display in the table.
4. If necessary, click other variables if you want to add more columns.

The new columns are displayed in the table.

Removing columns

5. Select the filter for which you want to change the table. Note the descriptions above.

The overview is reloaded.

6. Set the cursor on the header of the table.

A downward-pointing arrow is displayed for the cell.

7. Click the arrow and choose > *Columns*.

A dropdown list with all the columns in the table is displayed.

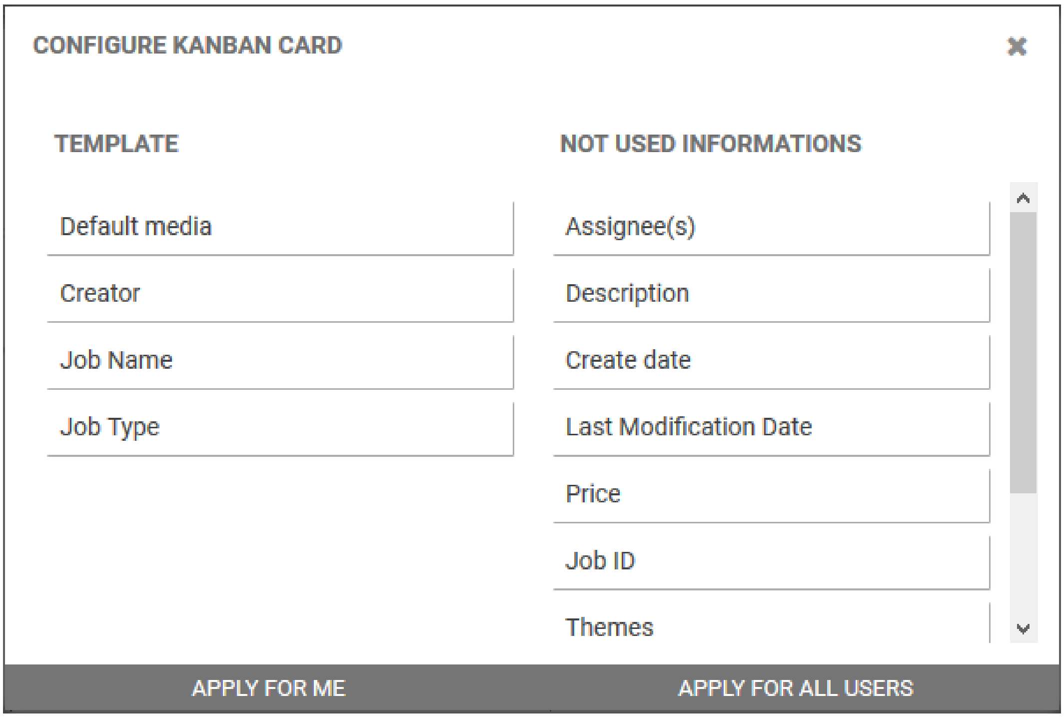
8. Deactivate the checkboxes for the columns that you want to remove.

The columns are removed.

3.1.2 Configuring Kanban view

In the Kanban view, you can configure the information displayed for the jobs or processes. To do so, choose *Configure* in the Kanban view. The *Configure Kanban card contents* dialog box opens.

The variables that are currently displayed on the Kanban card are displayed on the left-hand side. On the right, you can find the variables that are not currently in use. You can move the variables between the lists using drag and drop to specify which information is displayed. You can also set the order of the information on the Kanban cards. Choose whether to apply the changes for all users or only for yourself.



3.2 Filter

In the top left *Jobs*-dropdown list, you can access various filters for restricting the job overview according to predefined criteria. You can choose between three filter types in total:

- *Standard Filter*: The standard filter search criteria (for example, *Jobs I participate in* or *My Finished Jobs*) is predefined automatically and cannot be edited. For more information see STANDARD FILTER; see page 14.
- *Public Filter*: An advanced search can be saved and flagged as public. A public filter can be used by all users. Please see PUBLIC FILTER; page 15.
- *My Filter*: You can save an advanced search and store it as your own filter to use it again. For more information see MY FILTERS; page 15.

3.2.1 Standard filter

The *Standard Filter* search criteria is predefined automatically and cannot be edited.

My active jobs (ToDos)

Here you can find the jobs and processes for which you are the current assignee.

My other jobs

You can use this filter to find jobs and processes that you are involved in.

Jobs I participate in

You can use this filter to view all active jobs and processes (jobs that are not completed or canceled yet) in which you participate.

- Jobs and processes in which you are entered as a participant.
- Jobs and processes for which you are or were the assignee for a workflow step.
- Jobs and processes that you created yourself.

Jobs Delegated to Me

Here you can find jobs and processes that have been delegated to you by other users.

My Finished Jobs

This displays jobs and processes that you have created and finished. You finish a job or process by clicking the *Finish* button in the last step of the workflow.

My Canceled Jobs

This displays jobs and processes that you have created and canceled. You cancel a job or process by clicking the *Cancel* button when forwarding the workflow.

All jobs

Here, you will find all jobs and processes that are not yet finished or canceled. Even jobs and processes in which you are not involved are displayed.

Note: This filter is only available to users who have the appropriate right.

All Finished Jobs

Here, you can find a list of all jobs and processes that were finished.

All Canceled Jobs

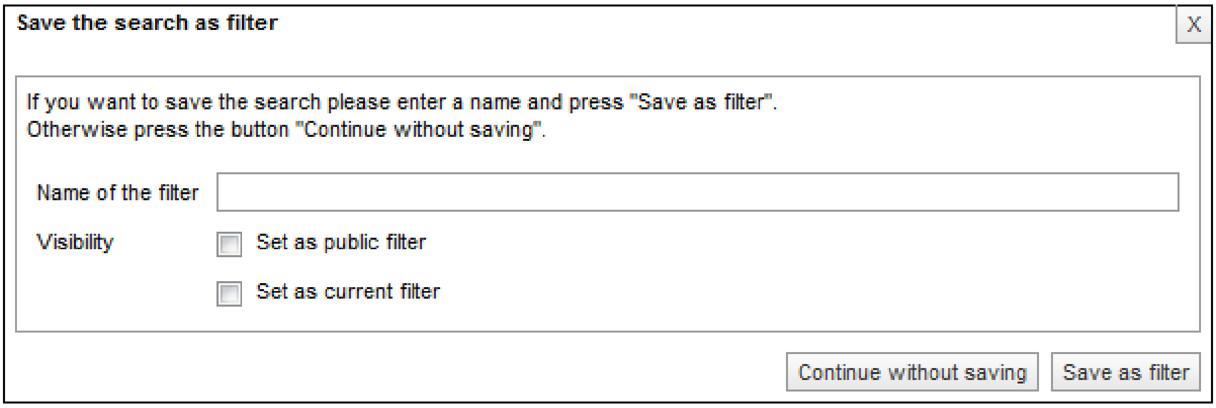
This filter lists all jobs and processes that have been canceled.

Deleted Jobs

Here, you can find a list of all jobs and processes that were deleted.

3.2.2 Public Filter

Under > *Public Filter* in the dropdown list, you can find all the filters published by you or by other users. To publish a filter, you must activate the *Set as public filter* checkbox when saving an advanced search.



3.2.3 My filters

In the dropdown list under *My Filter*, you can find all the advanced searches that you have saved as filters and have not published yet.

> **Note:** You can define one of your own filters as the default filter for the Job Manager homepage by activating the *Set as current filter* checkbox when you save an advanced search as a filter.

3.2.3.1 Saving and publishing a search as a filter

You have carried out an advanced search (search criteria: all jobs and processes that were created from `September 1, 2018`, and that are related to the item number `12345678`). You want to save the search request as a filter and use it again. The filter is to be called `Promotion 12345678`. You also want to make the filter available to other users and publish it.

Prerequisites

- You have carried out the search request and the search hits are listed in the job overview. To PERFORM AN ADVANCED SEARCH; see page 18.
- You have the right PUBLISH_FILTER.

Step by step:

1. In the area next to the dropdown list, click *Edit*.
2. The editing dialog box for the advanced search opens. The last entered criteria are displayed.
3. Choose *Search*.

The *Save the search as filter* dialog box opens.

4. Enter *Promotion 12345678* in the `Name of the filter` input field.
5. Activate the *Set as public filter* checkbox.

> **Note:** The *Set as current filter* checkbox is grayed out automatically. It is not possible to activate both checkboxes at the same time.

6. Choose *Save as filter*.

The filter `Promotion 12345678` is created in the dropdown list under *Public Filter*.

> **Note:** You can delete a saved filter, edit it at a later stage, and save it under a new name.

3.2.4 Simple search

You can use the simple search to further restrict an existing filter view. The entered keyword is searched for in the *Job Name*, *Job ID*, *Creator*, *Assignee(s),* and *Description* fields. Note that the search does not begin until you enter four characters. If you enter fewer characters, the result is blank.

The search uses a logical OR link when you enter multiple words without additional notation. If you want to search for a phrase, place the words in quotation marks. You can use the so-called wildcard * to search for substrings. For example, a simple search for `campaign*` will find both `campaign 2023` and `campaign Q3`, but not `Q3campaign`. All job names beginning with `campaign` will be found this way. The wildcard search only returns substrings to the right of *. A construct like `*campaign` is therefore not possible.

3.2.5 Categories

Instead of the simple search, you can also use categories to search for jobs and processes in an existing filter view. The categories are displayed as a dropdown list to the right of the simple search in the overview. When you click a category, only jobs and processes that match the current selected filter and that are assigned with this category are displayed.

Prerequisites for displaying the selection field:

- Category navigation is activated in the module-specific administration (> *Administration > Datasheet Engine > Other Settings > Job Manager*). Checkbox enabled for *Enable category quick filter*.
- The *Category* system variable must have been used at least once on a datasheet.

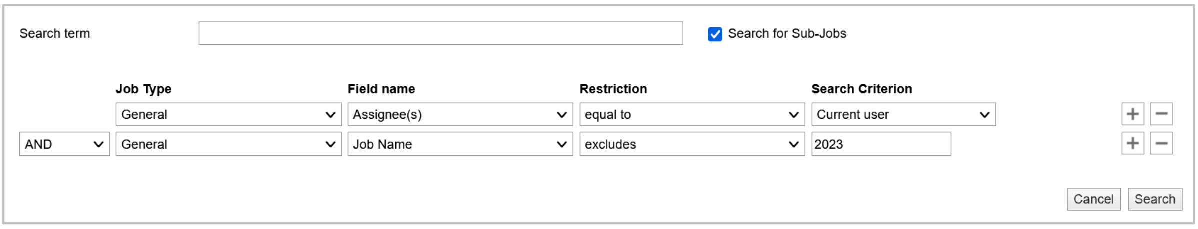
To deselect a selected category, click the white X next to the category dropdown list.

3.3 Advanced search

In the advanced search, you can restrict the jobs and processes displayed using the criteria below. You can access the advanced search at the end of the selection list. To learn how to PERFORM AN ADVANCED SEARCH, see chapter 3.3.1.

Function	Description
Job type	Select the type for which you want to search.
Field name	Select the field (the variable) that is to be searched. **Note:** The selection is dependent on the job type that is selected.

Function	Description
Restriction	Define the restriction to be used to search for the search criteria. For example, you can specify whether the search term should match the content of the selected field, the search term should simply be included in the field, or whether the search term should be excluded from the field. Criteria for date fields (the creation date or desired delivery date, for example) can be precisely defined.
Search Criterion	Enter the search term that you want to use to search the selected field using the specified restriction.
+ −	You can add additional search criteria (*Plus* sign) or remove search criteria that has already been created (*Minus* sign). You can link multiple search criteria using an AND or OR relation.



3.3.1 Perform an advanced search

You want to find all of the jobs and processes that were created since `September 1, 2018` and that relate to the item number `12345678`. You want to use the advanced search for the search request.

Step by step:

1. Choose > *Overview* and select the last item, *Advanced Search*, in the dropdown list.

   The overview displays all the jobs and processes that are currently being processed. The *Edit* button appears next to the dropdown list.

2. Click *Edit*.

   The editing dialog box for the advanced search is displayed.

3. From the *Job Type* dropdown list, select the entry *General*.
4. From the *Field name* dropdown list, select the entry *Create date*.
5. From the *Restriction* dropdown list, select the entry *after or on*.
6. Enter the date `September 1, 2018` in the *Search Criterion* or select the date using the data selector.
7. Click the *Plus* sign.

   This adds an additional line to your search request.

8. From the first dropdown list, select the entry *AND.*

This creates an AND link, which means that the system searches for jobs that must relate to both criteria.

9. From the *Job Type* dropdown list, select the entry *General*.
10. From the *Field name* dropdown list, select the entry *Item number*.
11. From the *Restriction* dropdown list, select the entry *equal to*.
12. Enter the item number `12345678` in the input field *Search Criterion*.

The dialog box is displayed as follows:

13. Click *Search*.

The *Save the search as filter* dialog box opens.

14. Choose *Continue without saving*.

The search is carried out and the search hits are listed. You can choose *Edit* to access the specified search criteria and then edit the criteria again there.

> **Note**
> In the advanced search, the search criterion *Current user* is available for the field name: *Creator*. This makes it easier to create filters to search only for objects for the logged-in current user (restriction: *equal to*) or vice versa not to search. In such filters, users have always had to be named until now.

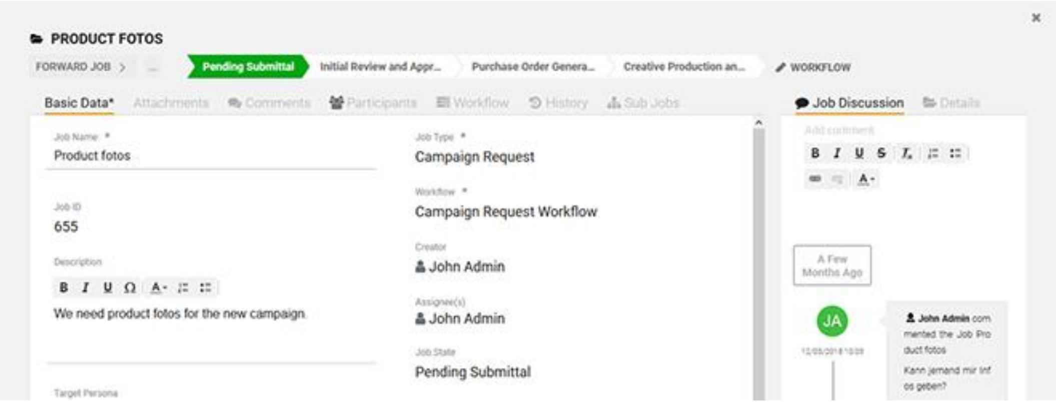
4 Datasheet

All of the information about a job or a process is collected and mapped on a *datasheet*. Various information can be grouped together and displayed clearly on a number of tabs.

Among others, you can view the following information on the job datasheet:

- The users who are involved/participating in the job or process
- The current state (the current workflow step or Job Manager state such as deleted, finished, or active)
- The creator and the current assignee
- The predefined project workflow for the job or process, including the tasks that have been defined
- The relevant information for the job or process

You open a datasheet by double-clicking the name, for example, on the dashboard or in the overview. The datasheet is displayed in full screen:



> **Note:** The appearance of the datasheet can be defined to suit the purposes of individual customers. Among others, the appearance is determined by the number of tabs created, their names, and the field functions that are used on them. The *Basic Data*, *Comments*, *Participants*, *Workflow*, and *History* tabs are created automatically. They can be renamed but *not* removed. The *Comment* tab can be hidden using the visibility settings.

You can access the various functions in the upper area:

- *Forward job*: This forwards the job to the next workflow step.
- **...** menu: You can access other functions here such as copying, creating a link, deleting, canceling, and creating a link to a planning element in the Marketing Planner.
- Displaying the current workflow status
- Workflow: This opens the Workflow tab, where you can edit the workflow status and the assignment of processors.

Below that, you can access the various tabs. If the icon is displayed next to a variable on a tab and you click it, a help text is displayed as a tool tip.
In the right-hand area of the datasheet, you can access the default *Job Discussion* and *Details* tabs.

Job Discussion displays the comments in the main job discussion. You can add a new comment or open a thread to an existing comment by clicking *Reply*. You can also access the main job discussion on the *Comments* tab. Furthermore, you can add additional discussions on this tab.
The *Details* tab displays the basic job data. If there is an asset selector variable on the datasheet, and you click it, the tab displays detailed information about the asset and - if a review was created for the asset - the details of the review. You can also find detailed review details in this tab, such as review started, approved, rejected, new version requested, or new version uploaded. If you see a (-) in front of the name of a line title, you can click on it and the area of the datasheet will be collapsed. This gives you a better overview of large datasheets. Conversely, you can expand collapsed rows of the datasheet again by clicking on (+) in front of its name. This option must be set by an administrator at the time of the datasheet layout, otherwise it is not available.

Click ✖ in the top right corner to close the datasheet.

4.1 Variables that are used frequently

To ensure that all of the necessary information (e.g., for campaign planning) can be entered, a large number of variables (field functions) are available.

Variables that are used frequently

Name	Description
Text fields (single or multi-line)	Here, you can enter a single-line or multi-line text. You can predefine the maximum number of permitted characters. In multi-line input areas, a maximum of roughly 500,000 characters (of unformatted or formatted text) can be entered.
Selection box (single or multi-selection)	Here, you can select from predefined entries. Both dropdown lists and radio buttons are possible. Selection fields can be linked to custom objects so that, for example, centrally defined boilerplate texts can be selected.
Date picker	Here, you can enter a date or select one using a date picker.
Asset Selector/Upload new image	You can add assets from the Media Pool or locally saved image files here (ASSET SELECTOR VARIABLE; see p. 22). **Note:** Note that you can only add an asset for each variable once.
Template	Here, you can create and edit a document in *Brand Template Builder* module directly from the datasheet.
Reference/Relation	Here, you can use data or information from different datasheets so that product information can be displayed from the Marketing Data Hub module, for example.
Relation	This displays the properties of linked objects in a table.
Task Manager	Here, you can view the tasks assigned to the individual workflow steps, edit them, and post times required.

Name	Description
Grids	Here, you can list required information in a table overview. You can use two different types of grids on a datasheet. For more information see chapter 4.1.2.

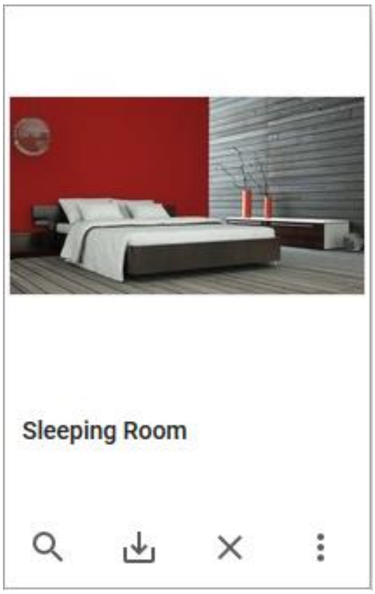
4.1.1 Asset Selector variable

You can use the *Asset Selector* variable to select assets from the Media Pool or add locally stored image files to the datasheet.

Note: Note that you can only add an asset for each variable once.

With the new file upload, it is now possible to upload multiple assets to a job/process in one step instead of single files.

After you add an asset, it will be displayed on the datasheet as follows:

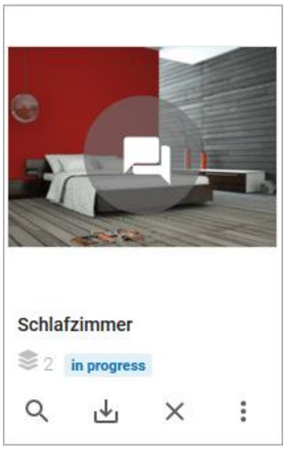
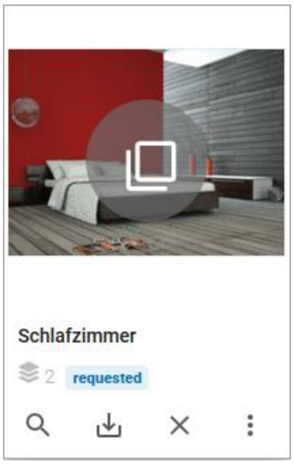
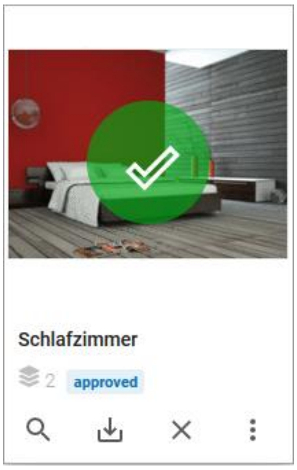


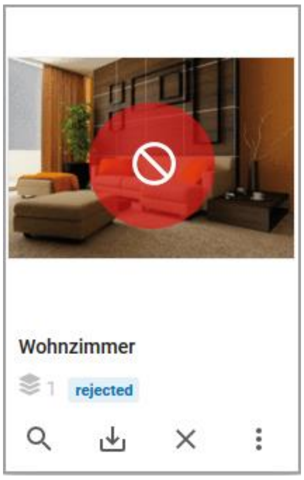
The button provides the following functions:

Button	Description
	This opens the asset details.
	This downloads the asset.
	This removes the asset from the datasheet.
	This opens the menu with the functions listed below.
Open	This opens the detailed view of the asset.

Button	Description
Start review	**Note:** Available only if the Review Manager module is activated and you have the appropriate authorization. This starts a review for the asset in the *Review Manager* module. When you start a review, the details are displayed on both the asset tile and on the *Details* tab on the right-hand side of the datasheet. With a new default system setting, reviews are now started directly without prior editing of the briefing and participant dialogs. However, as an administrator you can restore the previous setting under `dse.settings.simple_review` in the system settings. Previously in the datasheet's comment area, only the information on whether a user had edited a review that was started in the job or process was displayed. In addition, you can now check the respective status of the review here. Refer to the section below for information about the progress indicators for a review.
Open review	**Note:** available only if there is an ongoing review for the asset and you have the appropriate authorization.
Decide	**Note:** Available only if you have the appropriate authorization. You can decide whether to approve or reject the asset directly from the ongoing review.
Large preview	A large preview image of the asset is displayed.
Remove	This removes the asset from the datasheet.
Send As Email	This sends the asset by e-mail.
Download	This downloads the asset and saves it locally.

Progress indicators for a review

Display	Description
	The review has been started and is underway.
	The review is paused, and a new version has been requested.
	The review is complete, and the asset was approved.

Display	Description
	The review is finished, and the asset was rejected.

For more information about the review process, see the Review Manager user guide.

Example

For the planned production of a new advertising brochure, you edit a job that has the variable *Asset Selector*. You want to use the variable to select an asset from the Media Pool and make it available on the datasheet. The variable is on the `Image selection` tab on the datasheet.

Prerequisites:

- An *Asset Selector* variable has been placed on the datasheet for the job type that is in use.
- You are authorized to edit the *Asset Selector* variable.

Selecting an Asset

1. Open the datasheet and go to the `Image selection` tab.
2. The *Asset Selector* variable provides the following functions:

- *Upload new assets*: You can add a locally saved image file or an image file from the *Media Pool* collection *Own DSE pictures*.
- *Add from Own collection*: Choose from your personal asset collections.
- *Select from Media Pool*: This opens an advanced *Media Pool* search that you can use to add an asset to the datasheet.

3. Choose *Select asset*.

This opens a Media Pool search in a new dialog box.

4. Search for an asset. For information on searching the Media Pool, please refer to the Media Pool User Guide.
5. In the search results for the asset, you want to select, select the checkbox in the lower right corner of the asset's tile.

The checkbox is displayed in orange if you have activated it.

> **Note:** You can select multiple assets.

6. Click *Apply*.

The search closes and the asset is placed on the datasheet.

7. In the upper area of the datasheet, choose *Save* to save your selection.

The datasheet remains open for further processing.

8. In the upper right area of the datasheet, click ✖.

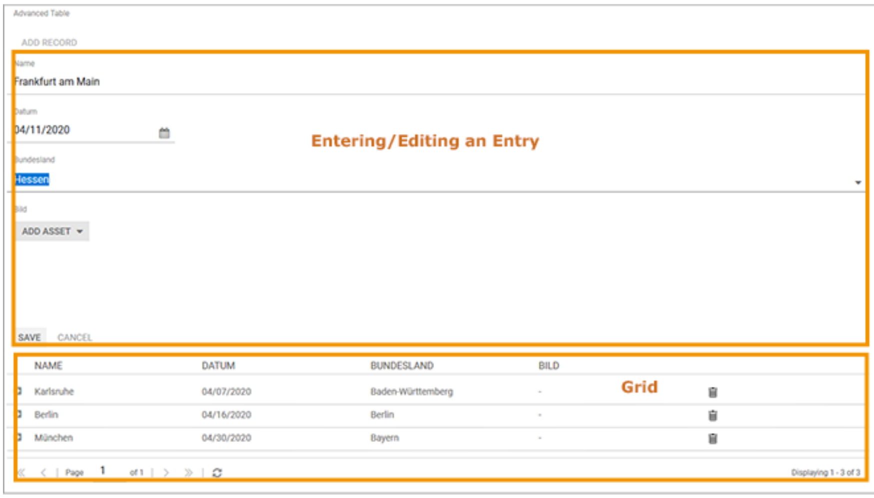
You have placed the selected assets on the datasheet.

4.1.2 Grids

Grids provide a means of entering data in a structured and clear way. You can use two different types of grids on a datasheet:

4.1.2.1 Advanced Grid

An advanced grid provides a means of entering a very wide range of data types such as text, image, date, relationships, or multi-selects. You can also display extensive grids of this type with pagination. You can see whether you are editing an advanced grid when you click *Add Record*: in the advanced grid, the fields to be edited open one below the other. Only after you have saved your entries will the data be displayed in a grid:



You can use the button to expand the view of the grid to full-screen mode. If the content of a cell cannot be displayed completely, move the cursor to the cell. All the content is then displayed in a tooltip. This also applies to the cells for the header.

If the grid contains a column for displaying images, the images are initially displayed with a small preview image. If you move the cursor to the small preview image, a larger preview is displayed.

If an advanced grid is added to the datasheet of a sub-job, it can be configured to be prefilled by a grid from the parent job. You can edit the prefilled table in the sub-job and delete and add data records. If the child grid differs from the parent grid, you will see a refresh button. If you click the refresh button, the grid is overwritten with the up-to-date values from the parent grid; your changes are permanently lost.

4.1.2.2 Comfort Grid

In a comfort grid, you can enter fewer data types: text, number, date, and simple selects. While entering or editing an entry, the table is still displayed like a grid. The date and number are displayed and entered according to the selected interface language. In addition, numerous keyboard shortcuts in particular make editing easier:

- You can enter as many rows as you like using a button. Rows can also be removed by clicking on the trashcan button.
- You can activate edit mode by double-clicking the table cell.
- If a cell is in edit mode, the user can use the ↹ key to jump to the next cell (then also in edit mode). When you press ↹ in the last cell of the table, a new row is added.
- Numeric fields: The value is increased by using the ↑-/↓ keys. In addition, numbers can also be entered via the numeric field.
- Date fields: Press the ↓ key in edit mode to open a date picker. Use ↑-/↓ and →-/← keys to select a date. The date is transferred by pressing the ↵ key. A date can also be entered via the text field.
- Use the *Copy record* button or the keyboard shortcut CTRL-C / CMD-C to copy the contents of the selected line.
- Use the *Insert record* button or the keyboard shortcut CTRL-V / CMD-V to paste the previously copied content back into the line below the selected data record.
- Hold down the SHIFT key and click on the first and last line to select a range of data records and then remove or copy them. By holding down the CTRL or CMD key, you can selectively click on several individual records and select them for further editing.
- Clicking on a column header will sort the contents of that column. Click again to sort in reverse order.

You can use the button to activate the view of the grid in full-screen mode. If the content of a cell cannot be displayed completely, move the cursor to the cell. All the content is then displayed in a tooltip. This also applies to the cells for the header.

4.1.3 Example: The Template variable

For the planned production of a new advertising brochure, you edit a job that has the *Template* variable. The variable was used to assign a template of *Brand Template Builder* module to the job or process automatically. The variable is on the `Brochure` tab on the datasheet. You want to edit the BTB template and create a new document in *Brand Template Builder* module.

Prerequisites:

- A *Template* variable has been placed on the datasheet for the type that is in use.
- You are authorized to edit the *Template* variable.

Step by step:

1. Open the datasheet and go to the `Brochure` tab.
2. Choose *Edit document*.

This creates a new document in *Brand Template Builder* module. The document opens in a new dialog box in the document wizard.

3. You can edit the document.

> **Note:** The functions and content that are available for editing are defined in the BTB template.

4. Choose *Close Document* to finish editing.

After you create and edit the document, a new icon is displayed above the preview image for the document. Click this icon to open the detailed view of the document.

5. To continue editing a document that has not been finalized yet, choose *Edit document* again.

> **Note:** You can download a finalized BTB document or send it by e-mail.

4.1.4 Example: The Document Selector variable

For the planned production of a new advertising brochure, you edit a job that has the *Document Selector* variable. The variable is on the `Brochure` tab on the datasheet. You want to use the variable to select an existing document in *Brand Template Builder* module and add it to the datasheet.

Prerequisites:

- A *Document Selector* variable has been placed on the datasheet for the job type that is in use.
- You are authorized to edit the *Document Selector* variable.

Step by step:

1. Open the datasheet and go to the `Brochure` tab.
2. Choose *Select from Brand Template Builder*.

This opens a search in *Brand Template Builder* module in a new dialog box.

3. Search for a document.
4. In the hit list, flag the desired document and choose *Use selected documents*.

> **Note:** You can select multiple documents.

The document has been added to the datasheet.

5. Below the preview image, you can open a menu with the following functions:

- *Edit*: This opens the document wizard in a dialog box.
- *Delete*: This removes the document from the datasheet.

> **Note:** You must have the relevant authorizations to edit the document.

6. In the upper area of the datasheet, choose *Save* to save your selection.

The datasheet remains open for further processing.

7. In the upper area of the datasheet, choose *Close*.

You have placed the selected documents on the datasheet.

4.2 Visibility of tabs and variables

The access to and visibility of tabs and the field functions (variables) placed on them can be restricted when you configure the type for each workflow step. For this, users are divided into the categories *Assignee/Processor*, *Creator*, *Other participants* and *Anonymous*. The category that you belong to when opening the datasheet thus determines which tabs and variables on the datasheet can be viewed or edited.

Visibility of datasheet tabs

The visibility of a datasheet tab can be defined as follows for each workflow step:

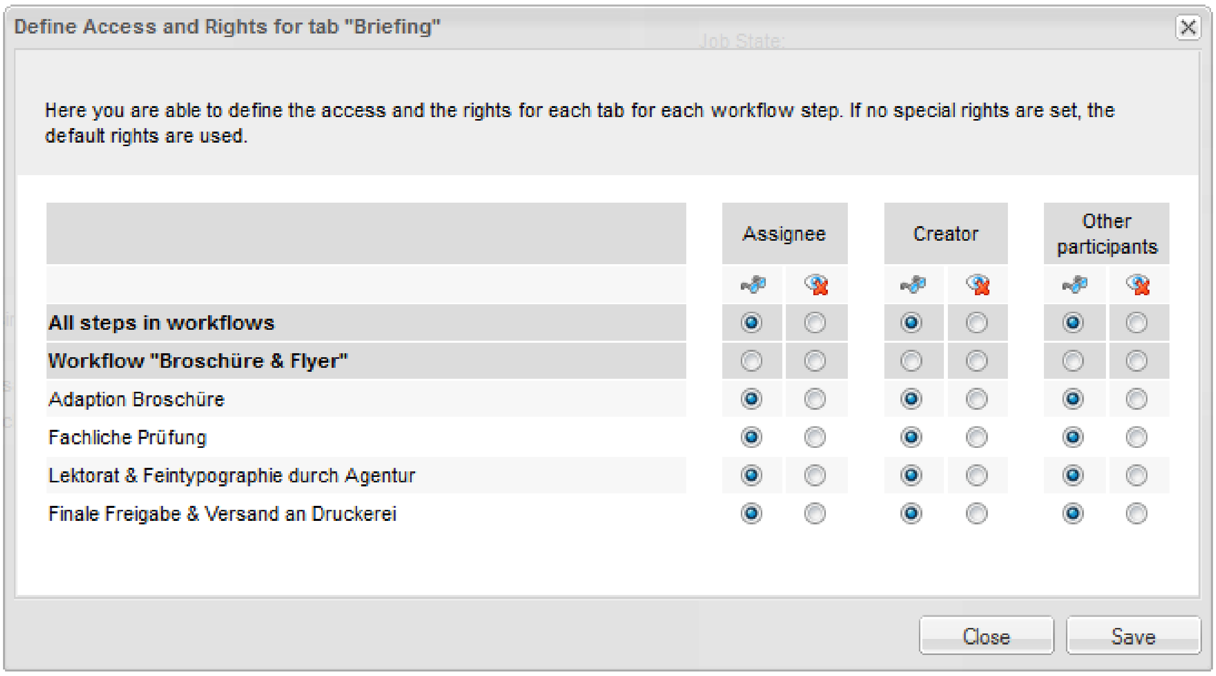
Category	Visibility
Initiator	Visible or not visible
Creator	Visible or not visible
Other participants	Visible or not visible

Note: The visibility of the *Basic Data* tab cannot be changed. The tab is visible to all users.

Access to variables (field functions)

The access to the variables placed on a tab can be defined as follows:

Category	Access
Initiator	Write access, read access, not visible, variable is a required field
Creator	Write access, read access, not visible
Other participants	Read access, not visible, same rights as the assignee
Anonymous	Read access, not visible


Define Access and Rights for tab "Briefing"
Here you are able to define the access and the rights for each tab for each workflow step. If no special rights are set, the default rights are used.
Assignee
Creator
Other participants
All steps in workflows
Workflow "Broschüre & Flyer"
Adaption Broschüre
Fachliche Prüfung
Lektorat & Feintypographie durch Agentur
Finale Freigabe & Versand an Druckerei
Close
Save

5 Working with Job Manager

5.1 Creating a Job or Process

You want to create a job or process for the planned production of a new advertising brochure. You want to use the job type `Advertising material production` as a template for this.

Prerequisites:

- You have the right CREATE_JM_REQUEST.
- You have the right SELECT_TYPE.
- The `Advertising material production` type has been created.

Step by step:

1. In the overview, choose *Add job*.

This opens a new dialog box.

2. Enter the *Name* in the input field.
3. In the list below that, select the `Advertising material production` type.

> **Note:** The name of the assigned workflow is displayed below the name. If multiple workflows are assigned to a type, all of the workflows are listed, and you can select your required workflow.

4. Choose *Add*.

The datasheet opens.

5. Optional: Enter any information required for the job, for example:

- Enter a briefing text to forward necessary information.
- Use the appropriate variables/field functions to select an asset from the Media Pool (to make images available as preselection, for example).
- Use the appropriate variables/field functions to select a document in *Brand Template Builder* module (to define the template to be used for the brochure, for example).
- Select the boilerplate texts required to create the BTB document.
- Add additional required tasks to a workflow step.

> **Note:** The appearance of the datasheet depends on your configuration of the type.

6. If you enter additional information: Choose *Save*.

Your entries are saved.

7. Select ✖.

This closes the datasheet. The job or process has been created with all your entries.

5.2 Copying a Job or Process

You have created a job or process with the type `Advertising material production` for the planned production of a new advertising brochure. Since you are planning an additional advertising brochure, you now want to copy the created job or process, including the information and data that is already created.

Step by step:

1. Open the datasheet.
2. In the upper area of the datasheet, choose ... > *Clone*.

This opens a new dialog box.

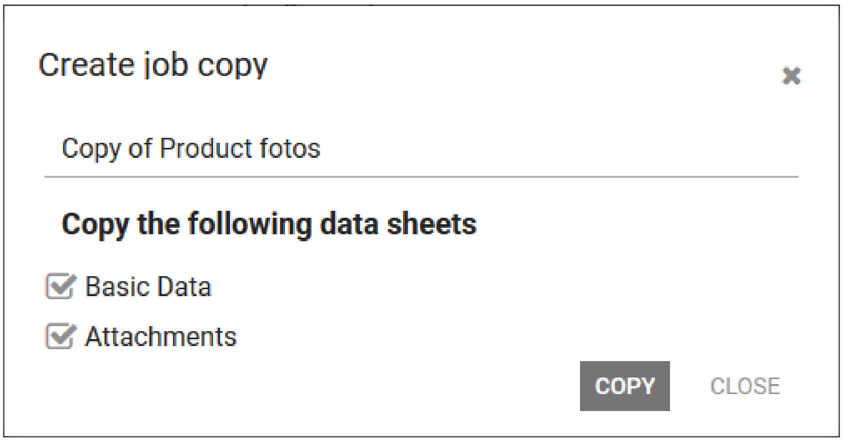
3. Enter the name of the job or process in the top input field.

> **Note:** The field is prefilled with the entry `Copy of <job name>` by default.

4. *Optional*: Deactivate the checkboxes on the datasheet tab that you do not want to copy for the new job or process.
5. Choose *Copy*.

The job or process is copied, and a new job or process is created.

> **Note:** For single select fields, the copy does not contain the entire selection list, only the selected entry. When you copy a job or process that contains a BTB template, a complete copy of the BTB template is created.



5.3 Sub-Jobs and Sub-Processes

You can add a sub-job or sub-process to a job or process so that additional related activities can be mapped, and additional related dependencies can be displayed. A sub-job or sub-process is linked directly on the datasheet of the parent job or process. You can open a sub-job or sub-process or its datasheet from the table overview. A sub-job or sub-process is processed in the same way as a normal job or process.

Properties of a sub-job or sub-process

- A sub-job/sub-process can use its own separate workflow.
- A sub-job/sub-process uses its own separate datasheet.
- The information and variables required for a sub-job/sub-process are stored on the datasheet of that sub-job/sub-process.
- A sub-job/sub-process can inherit and adopt values from a parent job/process.

To create a sub-job/sub-process, open the datasheet for the parent job/process and go to the *Sub-jobs* tab. Choose *Add sub-job*. You now continue in the same way as you created the job.

> **Note:** Use the breadcrumb trail displayed in the upper area of an open sub-job/sub-process datasheet to open the parent job/process datasheet.

To create a sub-job sub-job/sub-process, the following prerequisites must be met:

- The creation of sub-jobs/sub-processes is permitted in the type configuration.
- The use of one or more types as sub-jobs/sub-processes is permitted in the type configuration.

Sub-jobs/sub-processes can be created in a number of ways:

- Sub-jobs/sub-processes can be created with a job/process automatically.
- Sub-jobs/sub-processes can also be created optionally with a job/process. The first time that the parent job/process is saved, the system automatically asks the user whether they want to create the sub-job/sub-process. The user then chooses whether the sub-job/sub-process is created.
- If you are allowed to manually add sub-jobs/sub-processes, you can add optional sub-jobs/sub-processes if the parent job/process is already running. The user can then start the sub-job/sub-process using the *Optional sub-jobs* button on the *Sub jobs* tab. You can click the button to open the list of available sub-jobs.
- Sub-jobs/sub-processes can be created manually if required. Any type that can be used as a sub-job/sub-process can be selected.

5.3.1 De-archive job

It is possible to reactivate BPMN jobs that have already been terminated or canceled. The administrator can define from which workflow step the job can be edited again. See also under *De-activation event* in the Job Manager and Marketing Data Hub Administration Guide.

You can access the function at the top left of the datasheet after opening the job to be reactivated.

1. Click *De-archive job*.

   For canceled and terminated BPMN jobs, you will not have this button displayed if the respective BPMN type has already been deleted.

   If there are several reactivation points, you will see a selection dialog instead of the simple confirmation dialog. You can select from the list of possible workflows to reactivate the job in the selected workflow step.

2. Click on the respective list item to select the corresponding workflow.
3. Click *Confirm*.

You have reactivated a terminated or canceled job with BPMN workflow using the selected workflow step.

5.4 Participants

In addition to the creator and the assignee, additional users can be invited to a job or process as *participants* so that they can be kept informed about the job or process. You can invite individual users, entire user groups, or entire organizational units as participants in a job/process.

Prerequisites:

- You have the appropriate authorizations for adding additional participants to a job or process.

Note: When a user group or organizational unit is selected, all of the users in the user group or organizational unit are added.

Note: Use the standard filter *Jobs I Participate In* to list all of the jobs and processes to which you have been invited as a participant.

5.4.1 Inviting participants

You have created a new job with the category `Advertising material production`. You now want to invite the users `John Public` and `Dennis Demo` as participants so that both users can call the job using the standard filter *Jobs I participate in* and can keep informed about its current status.

Prerequisites:

- You are the creator of the job or have corresponding authorizations.
- The users that you want to add as participants can access the Job Manager module.

Step by step:

1. Open the job datasheet.
2. Go to the *Participants* tab.
3. Use the search field to search for the user `John Public`.
4. Select the user `John Public` from the suggestion list.

The user `John Public` is displayed in the table overview.

5. Use the search field to search for the user `Dennis Demo`.
6. Select the user `Dennis Demo` from the suggestion list.

The user `Dennis Demo` is displayed in the table overview.

> **Note:** Click the *Recycle bin* icon to remove a participant.

The users are sent notifications and added to the job as participants.

> **Note**
>
> You can also invite users to a job or process as participants by addressing the users in a discussion using @Mention. For more information, see the chapter 5.10.

5.4.2 Sending messages to participants

You want to send a message to all participants in a job or process.

Prerequisites:

You are the creator of the job or process or have corresponding authorizations.

Sending a message to all participants

1. Open the datasheet.
2. Go to the *Participants* tab.
3. Choose *Message to all*.
4. This opens the *Message* dialog box. The participants are already entered as recipients.

> **Note:** Click the × symbol after a name to remove a participant from the recipient list.

5. *Optional*: You can add additional recipients by searching for users using the input field.
6. Enter the *Subject* and the *Message* in the input fields.
7. Choose *Send*.

The message is sent to the selected recipients.

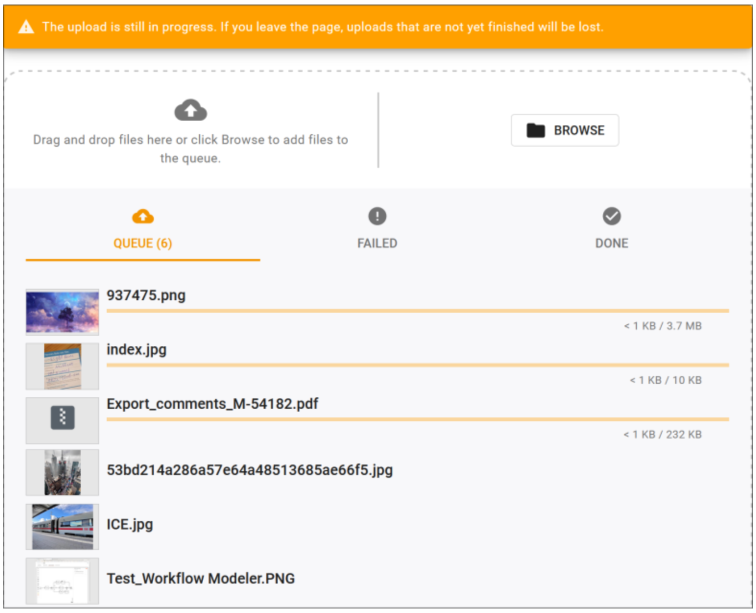
Sending a message to a selection of participants

1. Open the datasheet.
2. Go to the *Participants* tab.
3. Click the letter icon next to any participant to whom you want to send the message.
4. *Optional*: You can add additional recipients by searching for users using the input field. If the user is not a participant, you are asked whether you want to add the user as a participant. Note that you can still send the message to the user even if you do not enter the user as a participant.
5. Enter the *Subject* and the *Message* in the input fields.
6. Choose *Send*.

The message is sent to the selected recipients.

5.5 Add assets

It is possible to select and attach multiple files to a job at the same time to further reduce user wait times. This feature is handled internally by the Media Pool and the new file upload service.



You can continue working without much delay during the upload of large or many files, which takes place in a separate window.
If an upload fails, then a tooltip displays more detailed information when you hover over the file in question. Often the file is already in the Media Pool as a duplicate, which is why the upload is aborted.

5.6 Workflows

You have created a job/process and now want to plan the workflow steps. The plan includes the following tasks:

- Define the start and end dates of the workflow steps (see SCHEDULING A WORKFLOW; page 40). Note: After you create a job/process, it is automatically in the initial workflow step. You cannot plan this step; the step starts when you create the job/process and ends when you forward the job/process to the first work step. You can therefore only define the start and end dates for subsequent work steps.
- Define the assignees for the workflow steps; the assignment is a pre-assignment that can still be changed subsequently. See SPECIFYING AN ASSIGNEE; page 41.

The user that creates the job/process is the creator and is therefore entered as the assignee for the initial workflow step. The creator is responsible for fully processing the job/process. If you want to delegate responsibility to a colleague, enter the colleague as the creator of the job/process. See CHANGING THE CREATOR; page 43.

When a workflow step is complete, the assignee must forward the job/process to the next workflow step. It can be forwarded only if the mandatory fields for the completed step are filled. See FORWARDING A JOB/PROCESS, page 43. Depending on the workflow configuration, a job/process can be forwarded to either a user or a group. A job/process assigned to a group is displayed for all the members of the group in the *Available Jobs and Tasks* Dashlet. Any member of the group can accept the job/process as an assignee or assign it to a different member. For more information, see DASHBOARD, page 7.

More than one workflow step can be active at the same time in BPMN workflows and it can be assigned to individual users or user groups. If a workflow step is assigned to a user in a process, the following rule applies:

- A workflow step is assigned to the user: The datasheet of the process type is opened directly for editing that step.
- Multiple workflow steps are assigned to the user or his user group in parallel: A selection dialog opens. Here users can select one of the steps for processing that are assigned to them or their group.

5.6.1 Scheduling a workflow

Prerequisites:

- You are the creator of the job/process or have corresponding authorizations.

Scheduling a workflow

1. Open the datasheet.
2. Go to the *Workflow* tab.
3. Click the *Start date* column for the workflow step that you want to schedule.

> **Note:** Note that you cannot change the start and end date for the initial step. The initial step begins when you create the job/process and ends when you have entered the initial specifications and forwarded the job to the first work step.

An input field opens.

4. Enter the date when you want the step to start.

> **Note:** If you use a workflow with steps that have a predefined time period, an end date is entered automatically. This is a pre-assignment that you can change.

5. Click the *Due date* column.

An input field opens.

6. Enter the date on which you want the step to end.
7. *Optional*: Repeat steps 3 to 6 for all the workflow steps that you want to schedule.
8. Click *Save*.

You have defined the start and end date for the workflow steps.

5.6.2 Specifying an assignee

Prerequisites

You are the creator of the job/process or have corresponding authorizations.

Specifying an assignee

1. Open the datasheet.
2. Go to the *Workflow* tab.

> **Note:** Carry out the following instructions for the first work step and the subsequent worksteps. The first workstep is the initial step and can be assigned only to the creator. See CHANGING THE CREATOR; see page 43.

3. For the workflow step for which you want to specify an assignee, click the pencil icon in the *Assignee* column.

A dropdown list is displayed.

4. Select a user.
5. *Optional*: Repeat steps 3 and 4 for all the workflow steps for which you want to specify an assignee.
6. Click *Save*.

You have specified the assignees for the workflow steps.

Note

If the workflow step has not started yet, the assignment is a pre-assignment. The entered assignees are not informed about the pre-assignment.

Once the workflow step is started, the assignee is informed about the assignment or the change of assignment by e-mail.

5.6.3 Changing the creator

Prerequisites

You are the creator of the job/process or have corresponding authorizations.

Changing the creator

The creator is reassigned in the initial workflow step.

1. Open the datasheet.
2. Go to the *Workflow* tab.
3. Click the pencil icon in the *Assignee* column for the initial workflow step.

A dropdown list is displayed.

4. Select a user.
5. Click *Save*.

You have changed the creator.

5.6.4 Forwarding a Job/Process

Workflows can be configured so that you can forward them in different ways:

- You can assign a job/process to a user. This user is then the responsible assignee for the next workflow step.
- You can assign the job/process to a group. In this case, the job/process is displayed for all members of the group in the *Available Jobs and Tasks* dashlet. Any member of the group can accept the job/process as an assignee or assign it to a different member.
- The workflow lets you assign the job/process to either a user or a group.

There are a number of different ways to forward a job/process:

- Using drag and drop in the Kanban view
- In the header in the datasheet
- On the *Workflow* tab in the datasheet

Prerequisite

You have completed the current workflow step; that is, at minimum, the mandatory fields on the datasheet are filled. Other required information may also be specified on the datasheet.

Forwarding a job using drag and drop in the Kanban view

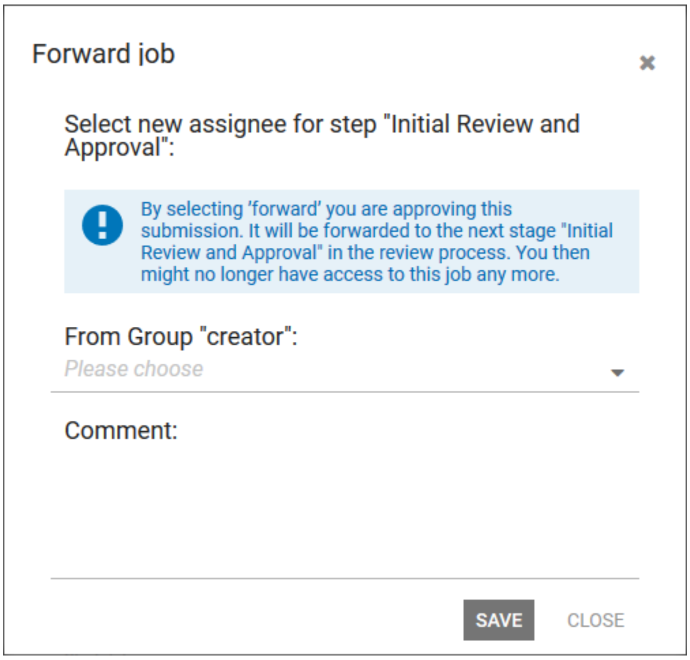
Note

Processes are shown in the Kanban representation of the module in read-only mode. This means that processes cannot be dragged and dropped into another workflow step. To do this, open the datasheet in the Kanban view and follow the subsequent description *Forward job/process in the header in the datasheet*.

The Kanban view lets you forward a workflow step through a graph and lets you forward more than one step, if necessary. Note that the right SKIP_WORKFLOW_STEPS is required to forward multiple steps.

1. Open the Kanban view by clicking the view icon under > *Overview*.
2. Go to the board where the job that you want to forward is displayed.
3. Drag the job to the step to which you want to forward it using drag and drop. A visual indicator shows whether you can send the workflow to the step.

The *Forward Job* dialog box opens. If an assignee for the next workflow step was entered during planning, the *Assignee* field is pre-filled.



4. Choose an assignee: Keep the pre-filled assignee or select a different user or group from the dropdown list.
5. *Optional*: Enter a comment for the assignee.

The comment is displayed in the main job discussion on the datasheet.

6. Click *Save*.

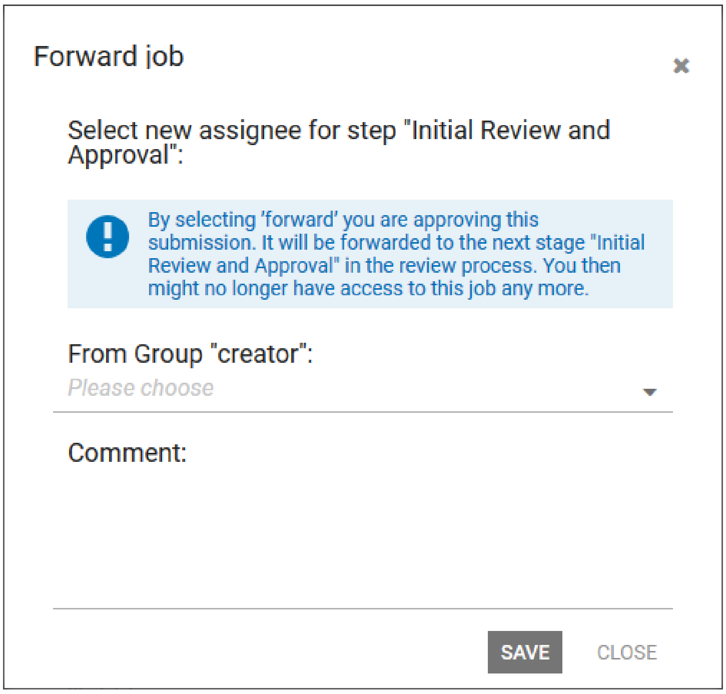
You have forwarded the job to the workflow step.

Forwarding a Job in the header in the datasheet

This procedure is ideal for when you have just finished the previous workflow step by editing the datasheet fields and the datasheet is still open. You can then only send it to the subsequent step.

1. In the header, choose *Forward Job*.

The *Forward Job* dialog box opens. If an assignee for the next workflow step was entered during planning, the *Assignee* field is pre-filled.



2. Choose an assignee: Keep the pre-filled assignee or select a different user or group from the dropdown list.
3. *Optional*: Enter a comment for the assignee.

The comment is displayed in the main discussion on the datasheet.

4. Click *Save*.

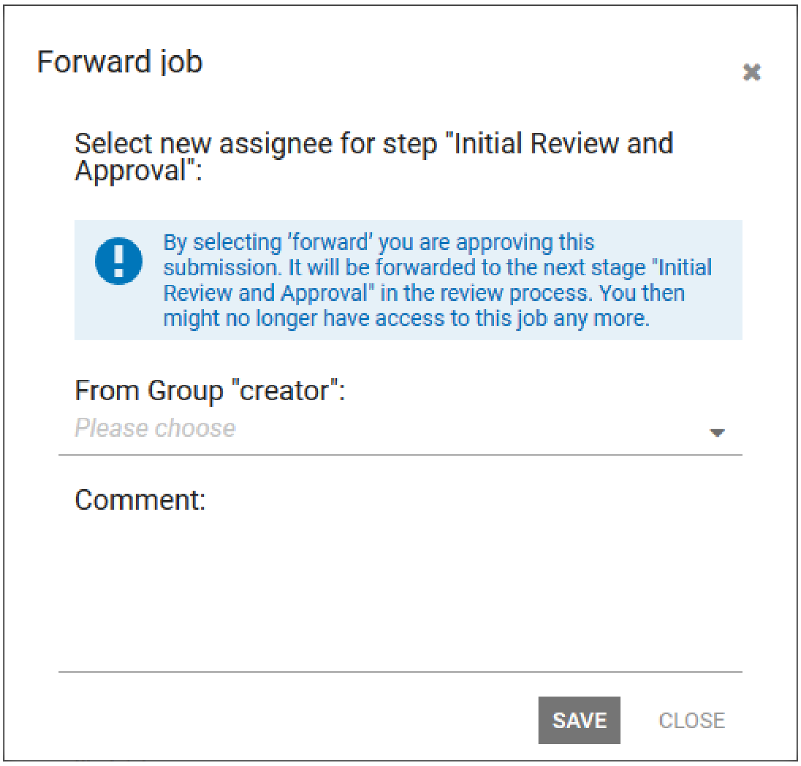
You have forwarded the job to the next workflow step.

Forwarding a job on the *Workflow* tab

This procedure is ideal for when you have just finished the previous workflow step by editing the datasheet fields and the datasheet is still open. You can also forward the job to more than one step here if necessary. Note that the right SKIP_WORKFLOW_STEPS is required to forward multiple steps.

1. Go to the *Workflow* tab.
2. In the row of the step to which you want to forward the workflow, choose *Forward to this step*.

The *Forward job* dialog box opens. If an assignee for the next workflow step was entered during planning, the *Assignee* field is pre-filled.



3. Choose an assignee: Keep the pre-filled assignee or select a different user or group from the dropdown list.
4. *Optional*: Enter a comment for the assignee.

The comment is displayed in the main discussion on the datasheet.

5. Click *Save*.

You have forwarded the job to the workflow step.

5.7 Link to planning elements in the Marketing Planner

You can create a job in the Job Manager on a planning element created in the Marketing Planner module. It is also possible to link a created job/process with a planning element. A link to the element will then be displayed in the calendar and in the budget view on the datasheet. If no sub-element exists which you can link with the job/process, you can create one.

> **Note**
>
> You will need the relevant rights and access to planning elements in the Marketing Planner in order to create a planning element, link one to a job or display a link to a planning element in the calendar or in the budget view.

If you create a link, a job is created in the detail page of the element on the *Tasks* tab in Marketing Planner. The following data is copied when you do so:

Job Manager, the job datasheet	Marketing Planner, Tasks tab, column
Job Name field on the *Basic Data* tab	Name
If filled: the *Deadline* field on the *Basic Data* tab If the *Deadline* is not filled: the current date	Date
User that created the link	Responsible person
Current workflow step	Status
Description field on the *Basic Data* tab	Notes
Selected job type	Type
Selected workflow	Workflow

Display

If a job/process is linked to a planning element, the *Marketing Planner* button is displayed in the datasheet header.

Click the button and choose *Go to calendar view* or *Go to budget view* in the dropdown list displayed to show the planning element in the view.

Creating a sub-element

If you want to link the job/process with a planning element which has not been created yet, you can create it in the Job Manager. Please note the following:

- The name is entered when the planning element is created in the Job Manager.
- The user who creates the planning element is entered as the Responsible Person.
- The duration of the planning element begins in the year in which it is created and ends at the same time as the parent element.
- The working currency and user groups with access rights are taken from the parent element.
- Dimensions and KPIs are taken from the parent element.
- The job/process is created as a task.
- The other properties will remain empty, e.g., external ID, timelines, etc.

If you want to change these settings, you will need to edit the planning element in the Marketing Planner.

Associated tasks

- Linking a job/process to a planning element; see page 48
- Removing a link to a planning element; see page 48

5.7.1 Linking a job/process to a planning element

1. Open the datasheet of the job/process which you would like to link to a planning element.
2. Choose > ... > *Link Planning Element*.

The *Link Planning Element* dialog box is displayed.

3. Select the year in which you would like to link the job/process to the planning element.

The planning elements of the selected year are displayed.

4. Choose:

If the planning element has already been created in the Marketing Planner:

   a. Select the planning element.
   b. Click *Link*.

If the planning element has not been created in the Marketing Planner:

   a. Select the parent element.
   b. Click *Create sub-element*.

   The *Create Sub-element* dialog box is displayed.

   c. Enter the name for the new planning element.

   The new planning element will be created.

   d. If you need additional sub-elements, repeat steps a to c until all of the required planning elements have been created.
   e. In the tree structure, select the new planning element to which you would like to link the job/process.
   f. Click *Link*.

The job/process is linked to the planning element. The job/process is entered on the *Tasks* tab in the details view of the planning element in the Marketing Planner.

5.7.2 Removing a link to a planning element

1. Open the datasheet of the job/process whose link you would like to remove.
2. Choose > ... > *Remove link*.

The link will be removed. The job/process will no longer be entered as a task in the detailed view of the element in the Marketing Planner.

5.7.3 Procedure for synchronizing planning elements

The synchronization of planning elements and jobs or processes includes the changes to timelines and budgets from the Marketing Planner's side. These are directly synchronized with the actual budget and timesheet tables of the job.

Modifications in the planning element data are adjusted even if the datasheet of the process is still open or is being saved. In this case, the data is written to the target fields without buffering.

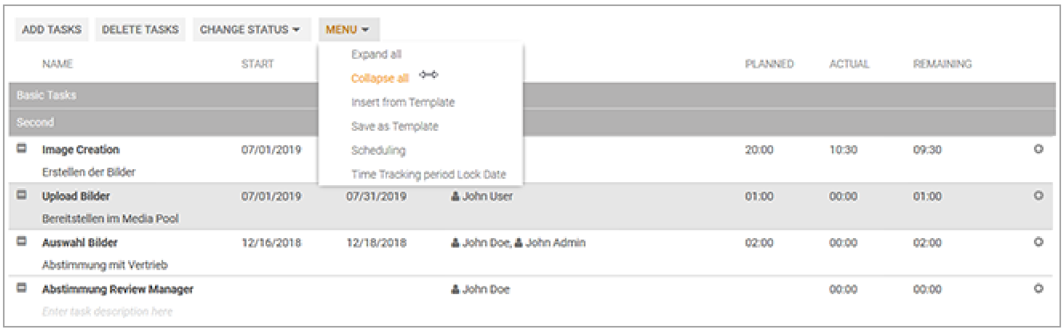
5.8 Task Manager

You can use *tasks* to plan and subdivide jobs/processes in more detail. Depending on the configuration of the job type, tasks are created automatically with the job/process. The individual task steps defined in a *task template* are then allocated and assigned to the appropriate workflow steps.

The individual task steps are displayed clearly in a table below the corresponding workflow steps on the datasheet. You can also add tasks separately from the workflow steps in the *Basic Data* area.

Prerequisites:

The *Task Manager* field is used on a tab in the datasheet.



Overview of the Task Manager

Column	Description
Name	This displays the name of the workflow step and the name of the corresponding task.
Start	This displays the start date on which you want the task to begin. **Note:** a warning is displayed if the start date is before the start date of the corresponding workflow step. However, you can edit the job/process and task as required despite the warning.
Finish	This displays the planned completion date. **Note:** a warning is displayed if the completion date is after the end date of the corresponding workflow step or if a workflow is forwarded to the next step before the task is completed. However, you can edit the job/process and task as required despite the warning.
Assignee	This displays the user selected as the assignee.
Planned	This displays the estimated required time (in hours) that is scheduled for the completion of the task.

Column	Description
Actual	This displays the actual time required for the task. **Note:** The value is transferred from the worklog of the responsible assignee, or you enter the value manually on the datasheet.
Remaining	You can calculate the difference between *Planned* and *Actual* and enter it in this field.
Status	The task status selected by the assignee is displayed (*open*, *planned*, *paused*, *in progress*, *done*, *canceled*).

You can also enter a description for a task below the entries in each column.

Overview of the Task Manager functions

Name	Description
Add Tasks	This creates a new task below the task that is currently selected. If no task is selected or if the workflow step does not contain a task, then the task is created below the last workflow step. Tasks can be assigned to a different workflow step using drag and drop.
Delete Tasks	This deletes the task that is currently selected.
Change status	You assign a new status (*open*, *planned*, *paused*, *in progress*, *done*, *canceled*) for the selected task. Note that time recording is unavailable with the statuses *done* and *canceled*.

Name	Description
Menu▾	From the context menu, you can choose: • *Collapse all*: The tasks displayed below the workflow steps are hidden. • *Expand all*: Any existing tasks below the workflow steps are displayed. • *Insert from Template*: This opens the *Import Task Template* dialog box, in which you can select a new task template. When you insert tasks from a template, the existing tasks are retained, and the new tasks are added. If the tasks are not added to the desired workflow steps, sort the tasks using drag and drop. • *Save as Template*: You can save tasks that you have added to the workflow steps as a task template. **Note:** You must have the right CREATE_TASK_TEMPLATES to save tasks as task templates. • *Scheduling*: This function makes it easy for you to move all start and end dates that have been entered already (if the start is moved, for instance). A condition for doing this is that the workflow must not have started yet. You select the start date or end date of a task as the reference data and move it to a new date. All of the entered dates are then moved with the same time span as the reference date. Weekends are considered for the move. • *Time tracking period lock date*: if you need to stop time recording (for example, to create a report or for accounting), use this function to choose a date from which time recording is no longer possible. The date can be changed.

5.8.1 Assigning a task and creating a new task

You have created a job with the category `Advertising material production`. The job consists of the following workflow steps:

- `Upload images`
- `Select images`
- `Transfer to litho`
- `Upload new version from litho`
- `Final check and publication`

The task `Make available in the Media Pool` is also assigned to the workflow step `Upload images`. You want to assign this task to the user `Roberto Dinero`. You now want to add the additional task `Review Manager discussion` to this workflow step. You schedule the time required to complete the task as `2 hours`. You also want to assign this task to the user `Roberto Dinero`.

Step by step:

1. Open the datasheet and switch to the *Task management* tab.
2. Click the row of the `Upload images` workflow step to display the existing tasks.

> **Note:** Choose *Menu* > *Expand all* to display the tasks for all of the workflow steps.

3. Double-click the row of the task.

This activates edit mode for the task.

4. Enter the user `Ralph Demo` in the input field.

The user `Ralph Demo` is entered as the assignee.

> **Note:** To delete a user, click the **×** symbol next to the user name.

5. Choose *Update*.

The task `Make available in the Media Pool` has been saved.

6. Choose *Add Tasks*.

A new line is created in the task plan below the task.

7. Enter `Review Manager discussion` as the name for the task.
8. Enter the user `Ralph Demo` in the input field.
9. In the *Start* and *Finish* column, enter the start and desired delivery date.
10. In the *Planned* column, enter `2` for the time required.
11. Choose *Update*.

The new task is created according to your entries. The user responsible for the task is informed by e-mail and can call the assigned task by choosing > *Tasks* in the upper navigation pane.

> **Note:** You can move tasks using drag and drop. Hold the SHIFT key down to highlight and move several tasks. You can use the esc key to undo the last entry in a field in the task planner as long as the field is active.

5.8.2 Rescheduling tasks

You have created a job with the category `Advertising material production`. The job consists of the following workflow steps:

- `Upload images`
- `Select images`
- `Transfer to litho`

- `Upload new version from litho`
- `Final check and publication`

The tasks `Make available in the Media Pool` und `Review Manager discussion` are also assigned to the `Upload images` workflow step. The dates `October 10, 2022`, and `October 12, 2022`, are defined as the start dates. `October 11, 2022`, and `October 14, 2022`, are defined as the desired delivery dates. Since dates have changed, you want to reschedule both tasks starting from the task `Upload images` and move the defined dates by `3 days`. You want the new start date for the task `Make available in Media Pool` to be `October 13, 2022`.

Step by step:

1. Open the datasheet and switch to the *Task management* tab.
2. Choose *Menu > Scheduling*.

   This opens the *Scheduling and Shifting* dialog box.
3. From the dropdown list, select the task `Upload images` as the *reference point*.
4. From the *Date* dropdown list, select the entry *starts at*.

> **Note:** Select the entry *ends at* to reschedule the tasks, calculated backwards starting from the specified date.

5. Use the date picker to select the date `2022-10-13` as the new start date. Alternatively, you can enter the new start date manually.
6. Choose *Calculate*.

The dates for the start and desired delivery date of all of the tasks have been recalculated and reentered. This recalculation also takes weekends into account.

5.8.3 Entering the time required

The task `Make available in the Media Pool` for the job `New brochure 2023` has been assigned to you. You have completed the task and now want to enter the time required (`1 hour`).

Prerequisites:

- Tasks and worklogs navigation are enabled (> *Administration* > *Datasheet Engine* > *Other Settings* > *Settings*). For jobs, stay on the default *Jobs* tab and expand the *Other Settings* section.
- The job is not completed, canceled, or deleted.
- No time recording lock is applied for the job.
- The task does not have the status *done* or *canceled*.

Step by step:

1. In the upper navigation pane, choose > *Worklogs*.
2. Click the *Add* button.

   This activates edit mode. The current date is entered automatically (*Date* column).
3. Expand the row by clicking the right arrow ▶.
4. Choose the top cell in the *Job* column.

   This activates edit mode. The jobs assigned to you are loaded to the selection list automatically.
5. Choose the job `New brochure 2023`.
6. Double click the top cell in the *Task* column.

   The tasks assigned to you for the selected job `New brochure 2023` are loaded to the list automatically.
7. Choose the task `Make available in the Media Pool`.
8. Double click the top cell in the *Effort* column.

   This activates edit mode.
9. Enter `1` as the value in the cell.

   All of the remaining cells (the workflow and workflow step, for instance) are filled automatically.
10. *Optional*: Click in the *Description* field to enter additional information about the task.

The times stored in the Task Manager (planned, actual, remaining, entered time) are updated.

> **Note:** Time values are formatted automatically based on the specified default format, "hh:mm", and saved. You can use "." or "," as the decimal point for floating-point numbers. The times you enter are converted to the default "hh:mm" format and rounded.

5.8.4 Changing the status of a task

The task `Make available in the Media Pool` has been assigned to you for a new product. You have completed the task and now want to change the status of the task to `Finished`.

Prerequisites:

- Tasks and worklogs navigation is enabled (> *Administration* > *Datasheet Engine* > *Other Settings* > *Jobs*).

Step by step:

1. In the upper navigation pane, choose > *Tasks*.

   This opens an overview of your assigned tasks.

2. Select the task `Make available in the Media Pool`.

   The *Change status* button is active.

3. Choose *Change status*.
4. In the menu that opens, select the status *Done*.

The new status is displayed in the overview.

5.9 Tracking changes

To follow the processing of a job/process, you can track and display the following changes:

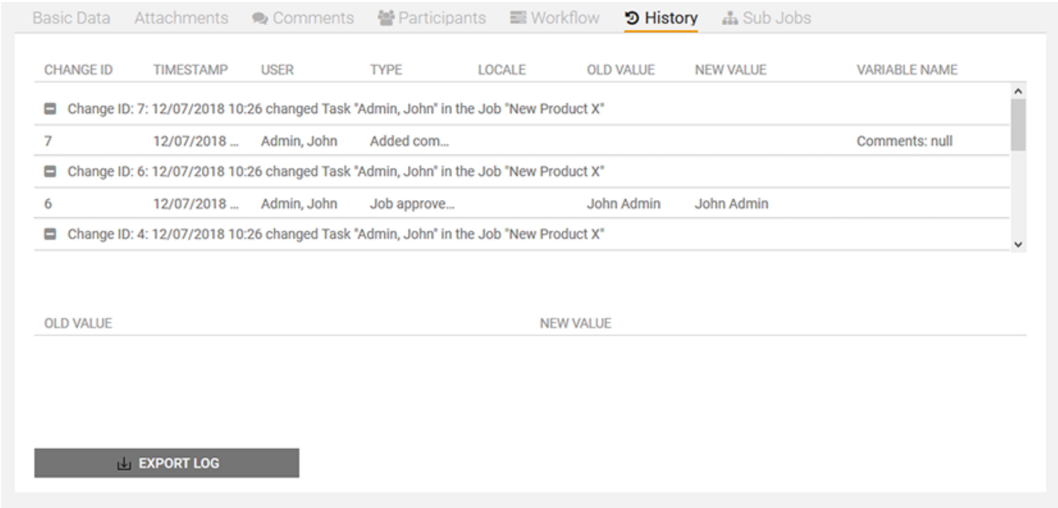
- In CHANGE HISTORY; see page 55
- In the JOB DISCUSSION; see page 56

5.9.1 Change history

You can use the change history to track when an object is processed or edited. The recording of the time required is also entered.
In the upper area of the open datasheet, choose the *History* tab to open the change history. The following information is displayed in a table overview:

- *Change ID:* Consecutive numbering of the changes (only with Job Manager)
- *Timestamp*: The time at which the change was made
- *User*: The name of the user who added or edited a comment or discussion
- *Type*: The type of editing or change (for example, the addition of a new comment)
- *Locale*: This column is not relevant in Job Manager.
- *Old value*: The original value of the edited variable
- *New value*: The new value of the edited variable
- *Variable name*: The name of the variable or discussion that was edited. Select the line to display the new and old value in the lower area of the dialog window.

Click *Export log* to export the change history as an XLSX file.

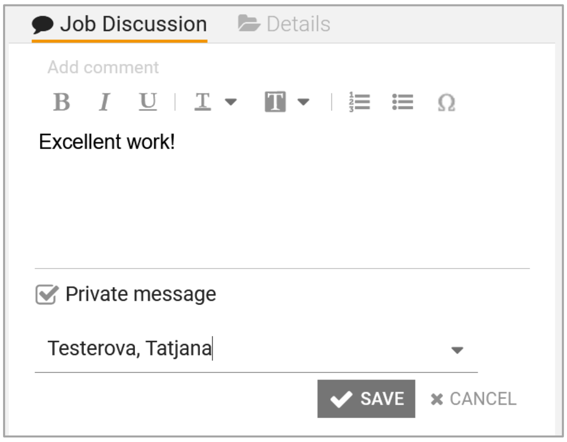


5.9.2 Job Discussion

Any user with access to the datasheet can add comments in the discussion. The discussion also shows events such as when a job/process was passed on in the workflow.

In the open datasheet, choose *Add comment* in the Discussion column. Enter your comment and click *Save*. Your comment is added to the discussion in chronological order. The following information is displayed in addition to the entered comment or event:

- The name of the user who created the comment
- The date and time when the comment was created
- Discussion posts and comments that you have previously labeled as *private message* can be recognized by you as creator by the lock icon in the overview after they have been sent.



If the job discussion pane takes up too much screen space for you, you can hide the right sidebar completely by clicking on the small right arrow ▶ in the splitter bar. This allows you to display the tabs of the datasheet in full screen width.

If you click the left arrow ◀ when hidden, the sidebar will be displayed again.

5.10 Comments

You can create discussions and comment on and discuss the content for a job/process. The functions required to do so are provided as standard by the Job Manager on the *Comments* tab.

Note: The individual customer can rename the *Comments* tab. The tab is available as standard on each datasheet and cannot be deleted.

@Mentions

You can use an @Mention to invite another user to a discussion. If you enter @ in the comment field, a list of users is automatically displayed. When you type the first characters of a name, the list is automatically reduced to matching users. If you use the arrow keys ↑-/↓, the selected entry is highlighted in the user list and the name is saved with ⏎.

Note

The users displayed for you in the list depend on your Job Manager role:

If your role does not have the authorization to invite users as participants to the job/process, only users who are already participants in the job/process are displayed.

If your role has this authorization, the system also displays users who have not yet participated in the job/process. Adding these users makes them participants of the job/process. The participants invited in this way are notified by e-mail.

Overview of functions of the job discussion:

Button/Function	Description
Tab *Comments* > *Add discussion*	This creates a new discussion. Enter a name for the discussion and save the name. You can then enter comments. To open the selection menu, do not click *Add Asset* directly, instead click the triangle arrow ▼ down. Here you can add assets to the discussion. • *Upload new asset:* You can add a locally saved image file • *Add from own Collection:* Add an image file from the Media Pool collection *Own DSE pictures*. • *Add website*: You add a website by means of a URL. • *Select asset*: This opens a Media Pool search that you can use to add an existing asset to the datasheet.
Add comment in side panel	This adds a comment to the job discussion.

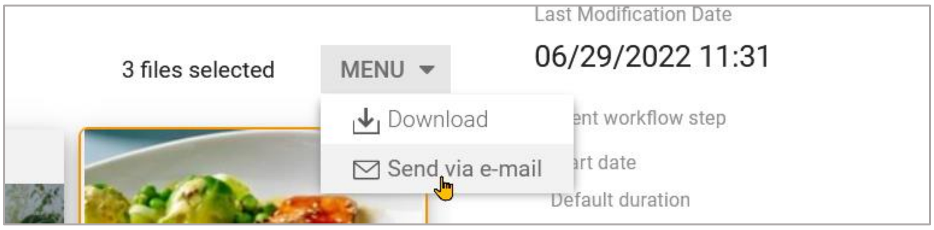
Button/Function	Description
Private message	After you have activated the checkbox, you will be asked to select a user or user group as the exclusive recipient of the discussion post or comment. When composing a reply, you cannot mark it as a private message. For users who are neither creators nor recipients, private messages do not appear in the history.
Replies	If you click *Reply* after a post, you can refer to it directly and your reply will initially appear immediately below collapsed under *...More comments*. Users can also reply to comments within the job discussion and in the Comments tab. Replies are displayed indented to the comment and can only ever be created at the first level. This precludes making replies to replies. Replies are initially hidden in the display. Click *N more comments* to show all existing replies to an entry. Click it again to hide the response history again.
...	In the discussion via the ... menu, you can access the following functions: *Configure Discussion*: In the discussion configuration, you can change the name of and participants in the discussion. **Note:** To be invited to the discussion, the users must be participants in the job/process. *Print as PDF*: This creates a PDF file of the discussion.
	The pencil icon opens the selected discussion or comment for editing.

Button/Function	Description
... (on the asset)	You can use the following functions for the assets added to a discussion or a comment: • *Large Preview*: This opens a large preview image in a pop-up window. You can call the detailed view of the asset from the dialog box. • *Review Manager*: You can load the asset to the Review Manager module and start a new review. **Note:** Click the Review Manager icon in the upper right-hand corner of the preview image to open the Review Manager. • *Open*: This opens the detailed view of the asset in a pop-up window. • *Add new version*: You can select and upload an image file as a new version of the asset. • *Remove*: This removes the asset from the datasheet. • *Send as e-mail*: This opens a new dialog box where you can send the asset by e-mail. • *Download:* This opens a new dialog box where you can save the asset. **Note:** Your authorizations determine which functions are available.

Writing comments in the comments area of the right sidebar and on the *Comments* tab on the datasheet is synchronous in both directions.

5.11 Downloading assets

For a datasheet with attached assets, you can mark a selection. Select multiple assets or uploaded files and download them in a single operation.



1. Select the desired elements from the asset overview.
   a. While holding down the SHIFT key, click the first item and the last item for range selection.
   b. Optional: While holding down the CTRL / CMD key, click all the individual elements you want to select one after the other.

A MENU button appears above the asset group with Download and Send by e-mail options.

1. Choose MENU > *Download*.

An asset download dialog will open. You do not need to modify anything here, unless you do not wish to download the originals.

2. Select the *Download* button.

The download is delivered as a ZIP archive to the local download folder of your browser.

3. You can close the window with the download dialog..

You have successfully downloaded multiple assets from a job as a ZIP archive.

5.12 Sending assets via e-mail

Select multiple assets or uploaded files in the datasheet and email them in a single operation.

1. Select the desired elements from the asset overview.
   c. While holding down the SHIFT key, click the first item and the last item for range selection.
   d. Optional: While holding down the CTRL / CMD key, click all the individual elements you want to select one after the other.

A MENU button appears above the asset group with *Download* and *Send via e-mail* options.

2. Choose MENU > *Send via e-mail*.

An asset download dialog will open. You do not need to modify anything here, unless you do not wish to download the originals.

3. Scroll down and fill in the e-mail template. Enter the recipient, subject, and optionally CC.
4. Edit the message body.

You can send the assets either as an attachment or as a link.

5. Optional: Choose whether the recipient will receive the selected version, or a different version of the asset.
6. Click the *Send as e-mail* button.
7. You can close the dialog window after the transmission is complete and the confirmation dialog is displayed.

You have successfully emailed multiple assets from a job.

5.13 Exports

You can export the jobs/process displayed for a filter to an XML file. Please note that this function also exports jobs/processes that do not appear in the list as long as they meet the current filter and search criteria.

This exports all the job data in XML format. In addition, the file also contains a time stamp so that you can identify when the export was carried out. With the *Asset Selector* and *Template* variable types, references to the corresponding objects are also exported.

The system does not export metadata for the type definition; instead, it exports just a reference to the respective type used. If you trigger multiple exports, the export jobs are added to a queue.

You can view the queue in the > *Exports* area and cancel requested exports if necessary. Completed exports are available for download.

5.13.1 Exporting Jobs

1. Filter the jobs/processes that you want to export.
2. Choose > *Whole Filter* > *Export jobs*.

An info message appears.

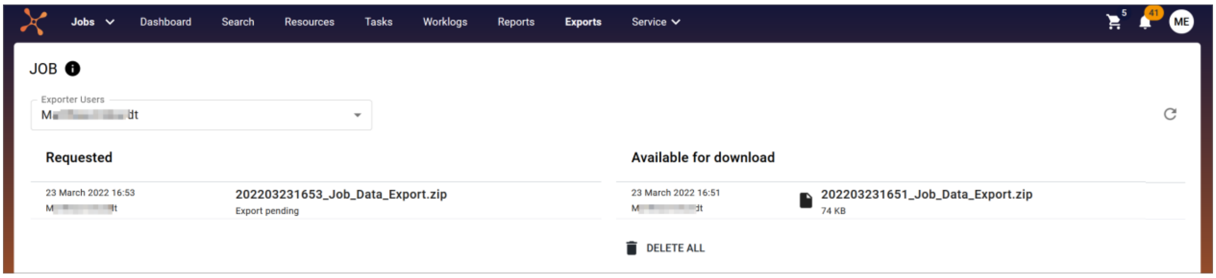
3. Confirm the message by choosing OK.

The export is performed in the background. When the export finishes, you are notified by e-mail, and you can then download it in > *Exports*.

5.13.2 Canceling a requested export

To cancel a requested export, go to > *Exports* and click *Cancel* for the relevant export in the *Requested* area.

> **Note:** Note that the screenshot shows the export area for users that are allowed to view the exports of all users. If you are only allowed to view your own exports, the display of usernames in the first column and the selection list above the *Requested* area are not displayed.



5.13.3 Downloading a completed export

To download a completed export, go to > *Exports* and choose *Download* for the relevant export in the *Available for download* area.

> **Note:** Note that the screen shot shows the export area for users that are allowed to view the exports of all users. If you are only allowed to view your own exports, the display of user names in the first column and the selection list above the *Requested* area are not displayed.

5.13.4 Deleting a completed export

To delete a completed export, go to > *Exports* and choose *Delete* for the relevant export in the *Available for download* area. To delete all of the exports, click *Delete all* below the list.

> **Note:** Note that the screen shot shows the export area for users that are allowed to view the exports of all users. If you are only allowed to view your own exports, the display of user names in the first column and the selection list above the *Requested* area are not displayed.

> **Note:** The *Import* function and the corresponding `IMPORT_FROM_XML` right have been removed from the user interface and from the system for security reasons.

5.14 Completing or Canceling a Job/Process

5.14.1 Complete

You have created a job/process for the planned production of a new advertising brochure. The job/process has run through all of the designated workflow steps; that is, all of the work steps and tasks for the new advertising brochure are complete. You now want to finish the job/process.

Prerequisites:

- You are the creator of the job/process or have corresponding authorizations.

Step by step:

1. Open the datasheet.
2. In the upper area of the datasheet, choose *Complete*.

This opens a new dialog box.

3. *Optional*: Enter a comment if required.

> **Note:** The entered comment can be called by choosing *View comments*.

4. Click *Save*.

The job/process state switches to `finished`.

This closes the datasheet. You can access the job/process using the *My Finished Jobs* function.

5.14.2 Cancel

You have created a job/process for the planned production of a new advertising brochure. Since the advertising brochure is not required until a later point in time, you want to cancel the job/process.

Prerequisites:

- You are the creator of the job/process or have corresponding authorizations.

Step by step:

1. Open the overview.
2. Select the jobs/processes that you want to cancel:

- In the table: Activate the checkboxes for the jobs/processes.
- In the Gantt chart: Activate the checkboxes for the jobs/processes.
- In the Kanban view: Click a free area of the Kanban board. If you want to select multiple jobs/processes, use the common shortcut for your operating system (for example, CTRL + click for Windows).

3. Choose *Cancel* in the upper area of the Jobs overview.

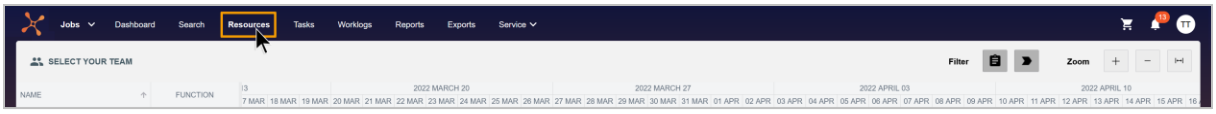
A security prompt asking whether you also want to cancel the sub-jobs/sub-processes may open. If you choose *Cancel*, the procedure is canceled, and the jobs/processes retain their current status. If you choose *OK*, the selected jobs/processes and their sub-jobs/sub-processes are canceled.

The job/process is canceled. You can access the job/process using the *My Canceled Jobs* function.

6 Resource Management

Resource management is available as an independent component of the Jobs module right in the menu bar.

To use it, the entry *Resource Manager* must be activated under > *Administration* > *System configuration* > *System settings*. When Resource Management is enabled, every user with access to the *Job Manager* module accesses the *Resources* entry in the module navigation.



Resource Management provides marketing managers an overview of the workload of users working on tasks and jobs/processes and enables easy optimization of work distribution. Each user can manage their work and absence times individually in the user settings.

A click on the *Select your team* button allows the user to compile their own combination of users to compare their workload and optimize it if needed.

6.1 Selecting a team

Using Select Your Team, you can create an individual combination of users to compare their workloads and optimize them if necessary. You can either select different teams (user groups) from a drop-down menu predefined by the administrator or select the users individually to show them in the resource overview.

1. Press the Select your team button.
2. Select a team or multiple teams or add individual users.
3. Press *Save*.

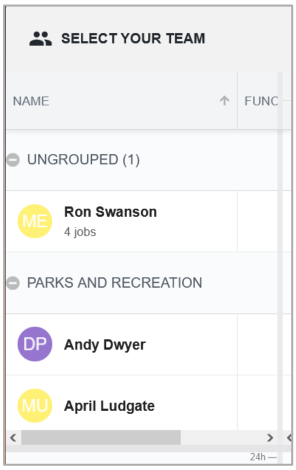
The selected users appear as a list on the left of the resource overview.

Multiple teams can be displayed. The team members are listed grouped by teams. Each group can be collapsed and expanded again.

With -/+ in front of the team name you can selectively collapse and expand the view of the individual teams. Your customized display of the teams is saved by the system. It will be restored the next time you open the Resource Manager.

Note

If a user belongs to multiple teams, that user will be listed only in the first team listed. Users who do not belong to any team are listed under the *Ungrouped* heading.



6.2 Unassigned tasks and workflow steps

The button on the Resources Management page allows you to show a list of all unassigned workflow steps and tasks on the side. This way you don't have to leave the Resources view to customize the datasheets of jobs with open workflow steps and tasks. Each task can be opened and quickly assigned to users. In the list of unassigned workflow steps, you can select start and end date as well as users from the assigned user groups.

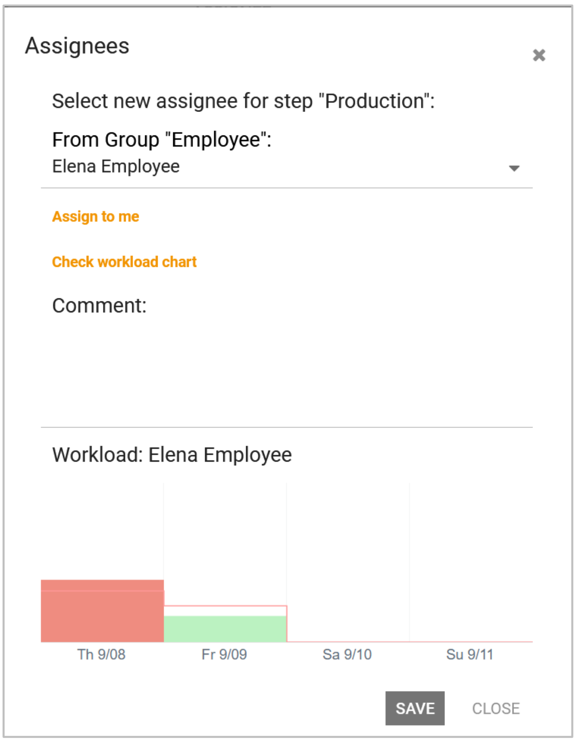
> **Note**
>
> An individual distribution is not possible for workflow steps as it is for tasks.

When assigning a user to a workflow step on the datasheet, you can check their workload beforehand.

1. Navigate to the *Workflow* tab in an open job with classic workflows.
2. In the *Assignee* column, select a workflow for which no assignee has been assigned yet.
3. Click the pencil icon to open the Assignees dialog.
4. Here you can select an assignee for the workflow step.
5. Select *Check workload chart* to check the workload.

The workload is calculated and displayed in the dialog, as shown in the figure below.

6. In the event that it turns out that the selected agent is overloaded or absent, you can decide whether another user should be considered as a substitute or use *Assign to me* to schedule the task for yourself.
7. Repeat steps 2-6 until all workflow steps are assigned.



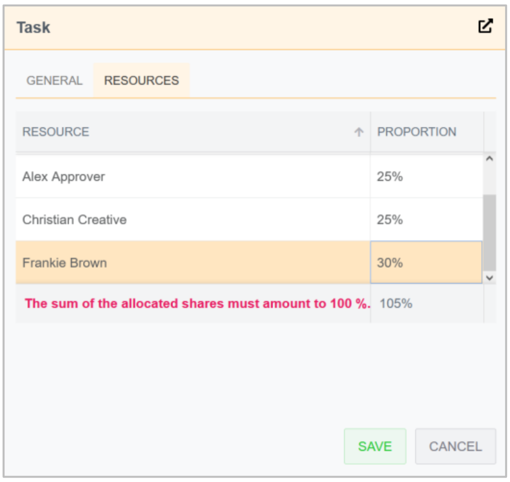
In the assignment dialog you can see the workload of the selected user compared to the working hours (from the settings).

The displayed workload is calculated based on the scheduled time (hours) of a task. When assigning a task, these scheduled hours are distributed evenly among all days and assignees.

You can switch from the dialog for assigning a task or workflow step directly to the job's datasheet via the icon at the top right of the dialog.

6.2.1 Individual assignment of tasks

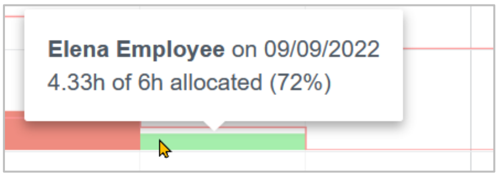
If you want to assign a task to multiple users, the distribution among them is the same by default. In addition, you can customize the task distribution individually. Double-click on a task to access the distribution dialog; in the dialog that appears, you can make the distribution on the Resources tab. If, for example, user A is to take on 20% of the task, and user B 35%, then 45% will remain for user C. This is because the sum of the percentages must always be 100%.



6.3 Working hours

In order to be able to calculate the users' workload, the working hours for the users which are available must first be recorded.

If working hours are saved for both the company and a user, the user's working hours are considered when calculating the workload. The company's working hours are used for newly created users or if a user does not enter individual working hours.



Move the mousepointer over a day in the utilization diagram in the row of a user. A tooltip appears showing the user's workload for the day of interest.

6.3.1 Company Vacations and Public Holidays

An administrator can set up calendars for the entire company or specific user groups and set up corresponding non-working days accordingly. In addition, calendar data can be imported in various formats.

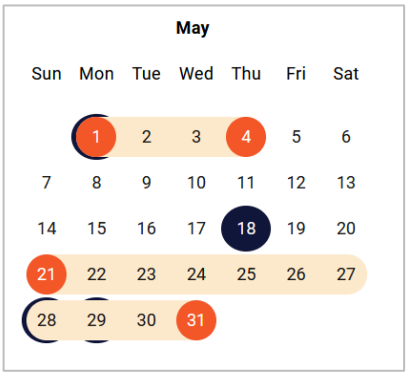
On the *Absences* page in the user settings, the calendars of the user groups can be displayed superimposed on the user's own absences. Company vacations and public holidays are automatically blocked in resource management for the users of the respective user group and are not available for the processing of tasks and workflow steps.

6.3.2 Absences

It is not possible to assign a task to users if they are not available.

For this to take effect, each team member who is assigned jobs should go to > *Users* > *User Settings* > *Absences* and mark the days and time periods on the calendar when they are not available to work.

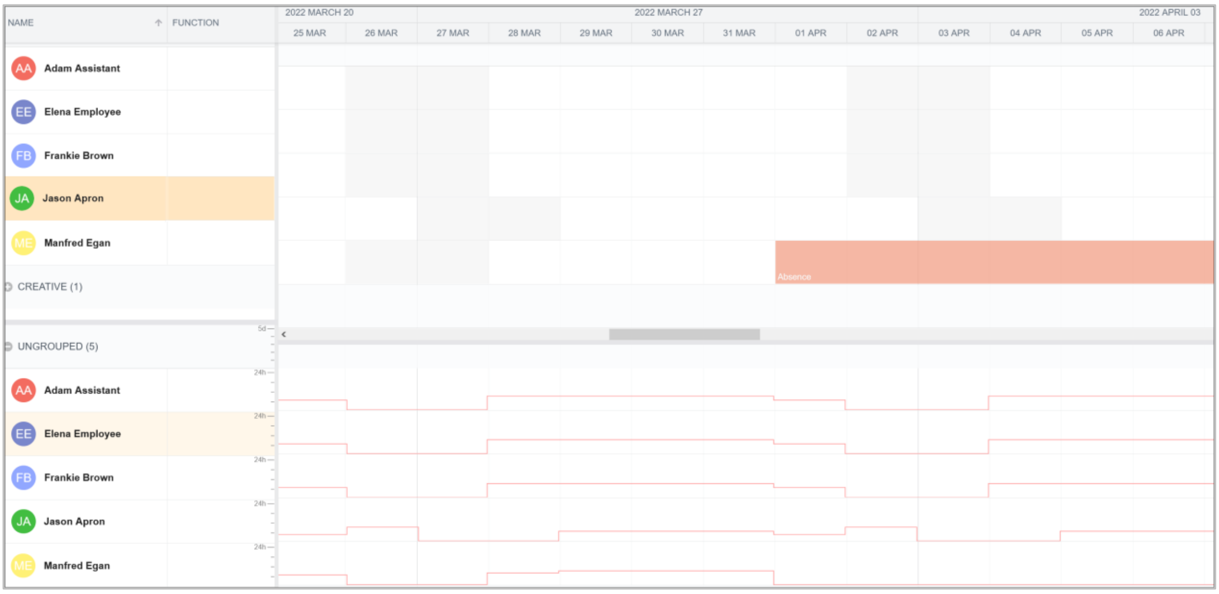
As a rule, this includes vacation time as well as training days or events such as trade fairs, which are considered in Resource Management. On the *Absences* page you can overlay the calendars of the user groups together with your own absences.



Note

It is recommended to enter one or more team members as substitutes in addition to the absences under > *User* > *User settings* > *Substitute*. In this way, you can ensure that time-critical tasks are not left undone if they begin before an absence and continue beyond it.

The following example lists a team of five users. Adam Assistant, Elena Employee and Frankie Brown have not entered any personal working hours and work according to the usual working hours in the company. The working hours of Jason Apron and Manfred Egan, on the other hand, have been adjusted by personal settings.

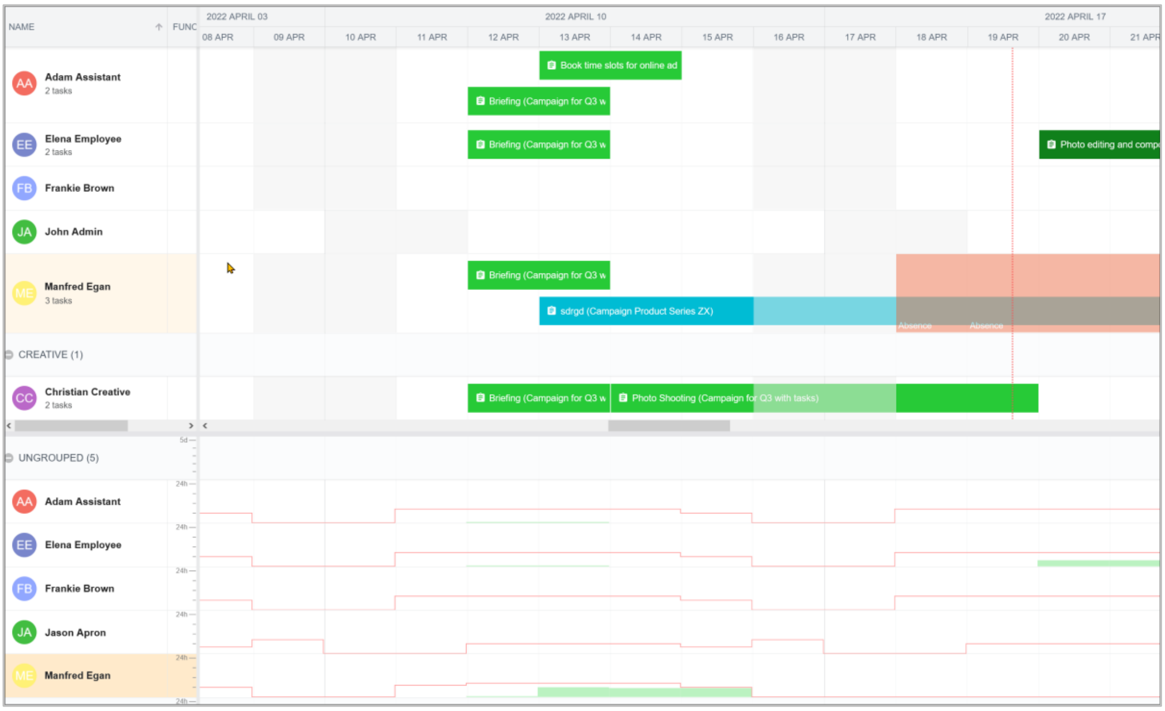


Manfred Egan has also entered an absence from April 1st and is on vacation from that date.

6.3.3 Visual representation

Under > *Jobs* > *Resources,* all assigned tasks and jobs/processes are displayed for the selected users and distributed over the days the user works. A vertical dividing line marks the beginning/end of a working week. With the three zoom buttons, you can enlarge or reduce the view step by step (+/-) or fit it to the window width with the button. The top section of the *Resources* page contains the team members on the left and then a calendar timeline on the right, with assigned tasks, workflow steps, and calendar events. The length of the bars corresponds to the planned duration in days.

The calendar display depends on your stored preference under *Country/Region* in the user settings. The work week starts on Sundays for EN/USA and on Mondays for DE/Germany.



Weekends and days off without registered working hours are displayed with a light gray background.

The upper area shows the pending absences, running tasks and jobs/processes for each user. Below the gray separator bar, the respective workload of the users is displayed. You can move the horizontal and vertical splitter bars. When you position the mouse exactly over the separator, the mouse pointer changes into a double arrow. Drag the mouse up or down to adjust the split view to your liking.

Use the (Tasks) and (Workflow Steps) buttons to filter the display. After loading the Resource Management screen, both filters are initially active. The color bars are labeled in front of the actual name with the same icons as the filter buttons for task or workflow step. The bars representing the tasks are labeled with name of the task (name of the job/process) for better orientation.

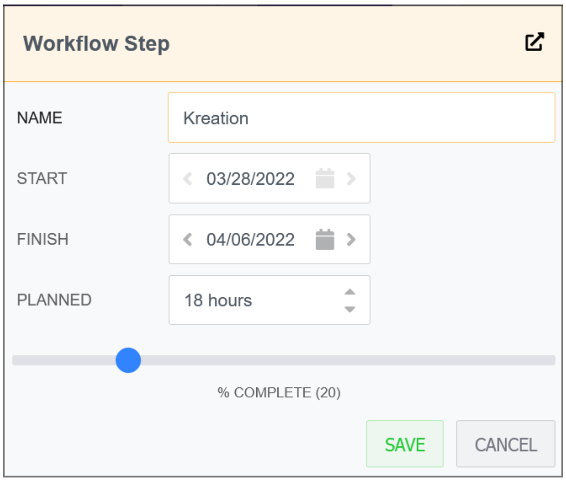
Simultaneous tasks and jobs are displayed one below the other. The following data is considered for the duration of workflow steps and tasks:

- For processes, the start and end date should already be entered by the administrator in the workflow modeler in the *User task properties* under *Default duration in days*.
- The duration of a task or a job corresponds to the difference between the start and end date.
- The effort of jobs and processes is defined in the Resource Management. For tasks, the effort can be defined both in the Resource Management or on the datasheet in the Task Manager Variable.
- For jobs with classic workflows, all workflows are mapped. For processes with BPMN workflows, you only see the active workflow step here. This is because in the case of branched workflows, it is difficult to predict whether all workflow steps will be executed in the end. Classic workflows that are not the active workflow step, but only planned, are displayed crosshatched.

6.3.4 Enter effort

To adjust the planned effort directly in the Resource Management:

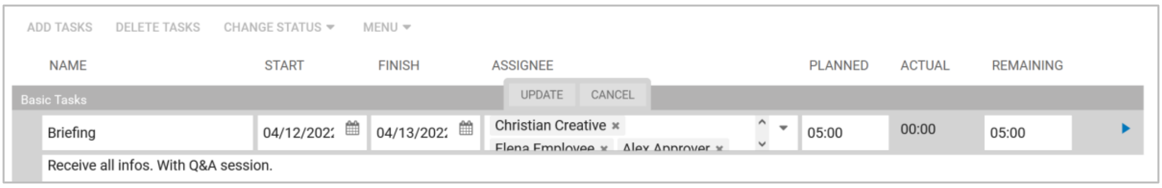
1. After double-clicking on the task or workflow step bar, the details will open in a separate window.
   - Click on the icon in the upper right corner to open the job's datasheet instead.
2. For each task, enter your new effort estimate in the *Planned* field.
3. Use the blue slider to indicate what percentage of the task/an ongoing workflow step has already been completed proportionally.
4. Click *Save*.



You have changed and saved the effort.

> **Note**
>
> Note that jobs and tasks are only displayed if an assignee has been previously assigned and both a start and end time have been stored.

To adjust the planned effort of tasks in the datasheet of the job, proceed as follows:



1. Open a job with tasks and switch to the *Tasks* tab.

   You will see an overview of the individual tasks with the planned times.

2. For each task, enter your adjusted effort estimate in the *Planned* field.
3. Click *Update*.

You have changed and saved the effort. See also ENTERING THE TIME REQUIRED on page 54.

6.3.5 Adjust start and end date

After double-clicking on tasks and workflow steps of a job in Resource Management, you also have the option to adjust the date for *Start* and *Complete*.

5. Click the calendar icon in the *Start* or *Complete* field to select a different date using the date picker. Use the left and right arrows to move the entry forward or back by one day.
6. Click on *Save*.

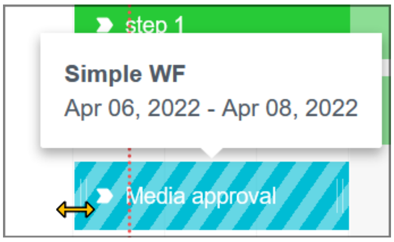
   However, you can also conveniently change the duration using the mouse at the edge of the color bars.

7. Navigate with the mouse to the beginning or end of the bar for a task or a workflow step in Resource Management.

   The mouse pointer changes its appearance to a double arrow and the bar gets a drag icon at the beginning or end.

8. Click and hold down the left mouse button and now drag the end of the bar left or right to the desired date.

You have adjusted the duration by your change.



You can change both the beginning and the end only for jobs with classic workflows and tasks. For processes with BPMN workflows, only the end can be adjusted.

> **Note**
>
> The creator of a job can continue to make changes to it as it progresses. Other users must have the MANAGE_ALL_TIMELINES right to be able to make changes to the duration in Resource Management or to change the editor tor of a workflow step. If the rights check shows that you do not have sufficient rights, the drag-and-drop action is undone, or the detail dialog is closed again.

Processes with BPMN workflow

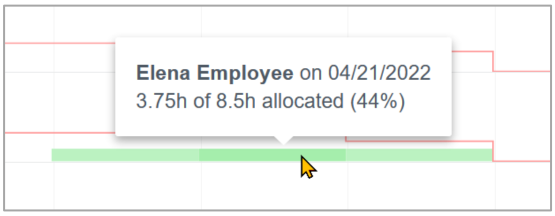
The date on which the workflow step was activated is used here as the start date.

The end date is calculated by adding the start date + the default duration in days. If the standard runtime has not been defined in the Workflow Modeler, one day is assumed.

> **Note**
>
> Note that the time effort for tasks and jobs/processes that are edited by multiple people is divided equally. If a task with 8 hours of time effort is assigned to three users, the proportional effort for each of these users is 2:40 hours.

6.3.5.1 User workload

The bottom half of the Resource Management view shows, with the help of a red line, the number of hours available to each user within the scope of their activity. A color bar indicates how many working hours are scheduled for the user. As long as the daily maximum working hours are not exceeded, the bar is green. If the daily working hours are exceeded, the bar is red. If you move the mouse over one of the color bars on a date and pause, you will see a tooltip with the exact details of the user’s availability and utilization on that day.



The bars for workflow steps that can be assigned can simply be dragged and dropped onto the line of a user who still has free capacity.