BrandMaker

Release Notes

Version 7.3

EN

24 August 2022

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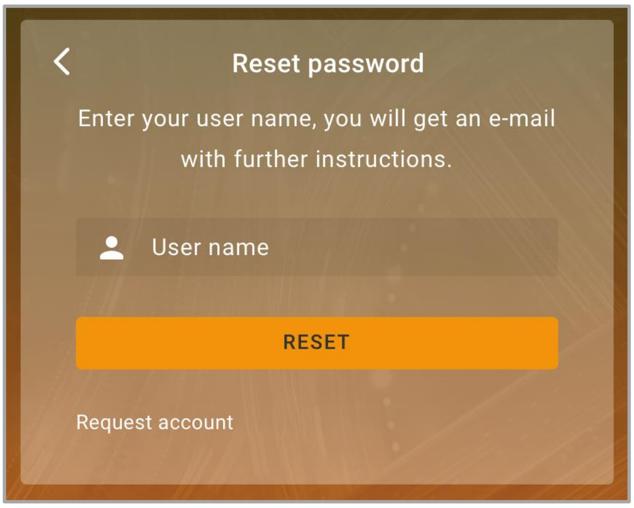
1 System-wide changes

1.1 Reset password

The appearance of the *Reset password* page has been updated and modified to match the login page. A user who have forgotten their password can request a password reset on the login page. The user will then receive an e-mail containing further instructions and a reset link.



After clicking on the reset link, a dialog opens asking the user to enter their new password twice. As before, the requirements that a new password must meet can be set by the administrator in the system settings. Clicking on the *Change password* button completes the process and the user can use their new password to log in.

1.2 Changes to the color scheme

The color scheme in version 7.3 has been adapted to match large parts of the application. This changes the look and feel of the interface and sometimes reduces the choice of colors to a predefined set, for example when selecting colors for period categories in the Marketing Planner.

1.3 Discontinuations

1.3.1 SSO

The previous SSO (single sign-on) feature is no longer used from version 7.3 onwards. The conversion to SAML has been completed.
The outdated SSO functionality, which was controlled by two system settings, has been removed. Please switch to the SSO functionality that uses the SAML standard.

1.3.2 From Version 7.4 onwards: Basic Authentication

Please note Basic Authentication will be discontinued starting with version 7.4. Until now, HTTP Basic Authentication with login and password has been used for access via API. For security reasons, the authentication mechanism will be switched to the OAuth2 standard in Version 7.4. Authentication via the previously used mechanism will then no longer be possible.
For this reason, you should switch your authentication to the new mechanism in the coming months. Note that authentication with the oAuth2 standard was already successfully implemented in version 7.0, so you can start migration right away.
For this purpose, the customer application must be registered in the BrandMaker Administration with the HTTP Bearer Authentication and a corresponding oAuth2 workflow. For more information on configuring the authentication, see here.

2 Administration

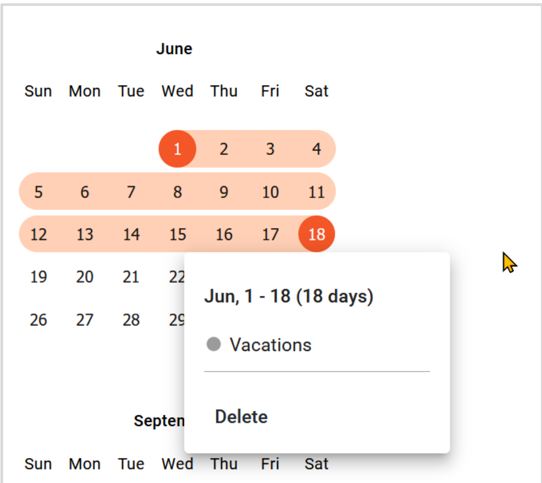
2.1 Company vacations and public holidays

Administrators can manage public holidays and the periods when company vacations apply to all or some employees. These details flow into resource management. You can manage a calendar for each user group. Users are automatically assigned to the associated calendar if they are a member of a user group to which this calendar is assigned.

You can reach the configuration page via > *Administration* > *Users & Groups* > *Company Vacations and Public Holidays*. Use the *Create* button to set up a new calendar.

If calendars already exist, the first calendar in the list will be automatically selected. The calendar shows entries for the next 10 years. There is a holiday calculator for the holidays in the selected year. The *Select Calendar* drop-down menu has a search field. A calendar can be made available across the entire company or just for specific user groups. You can adjust calendar permissions via *Settings* even after the initial setup.

You can duplicate an opened calendar using the *Copy* button and use its contents as the basis for a new one. Vacation days can be created manually by clicking on a single day or a range of dates (first day - last day) in the calendar. The changes will be applied by clicking on the *Save* button at the bottom of the page.



Clicking again on the selected date range allows you to remove the pre-assigned vacation days using the *Delete* menu command.

It is also possible to add calendar files from other applications using the *Import* button. Calendar data import formats supported are: .ics, .ifb, .iCal and .iFBf.

The calendar that is currently open can be deleted by clicking on the trash icon.

2.2 KeyCloak authentication

For security reasons, version 7.3 switches the internal authentication mechanism from basic authentication to the OAuth2 standard. For this purpose, BrandMaker uses KeyCloak authentication for communication between software modules, software containers, etc. – i.e. Keycloak acts as a secure and robust identity provider (IDP).

The redesign of the back-end undertaken in this regard mitigates known performance issues and increase resilience.

This was achieved by developing new services with regard to:

- Caching capability
- Scalability
- REST API

Authentication calls have been updated to use KeyCloak system-wide, as the previous method is no longer used.

This conversion covers:

- Direct login
- SAML login
- Autologin
- Requests for access data for new users

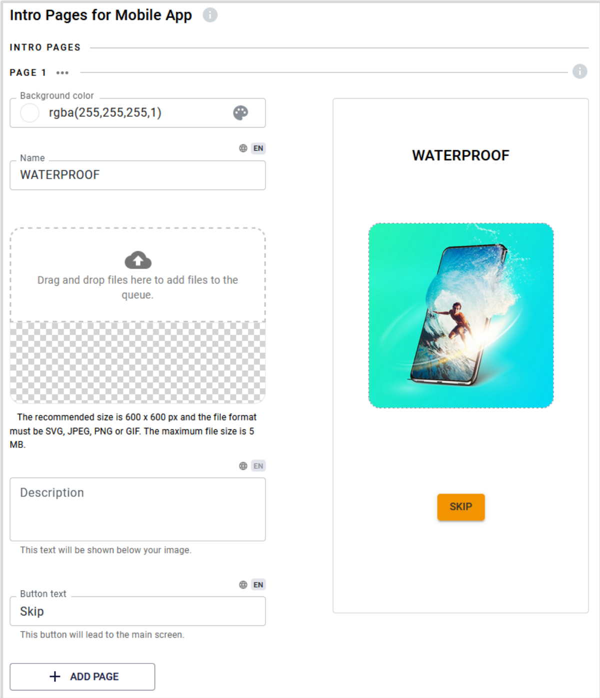
Keycloak is an open source identity and access management solution for use in modern software and infrastructure. You can find background information on Keycloak technology on the vendor's site here.

2.3 Intro pages for mobile app

From version 7.3 onwards, you can set up one or more pages to be displayed in the app after logging in.

You can reach the configuration page under > *Administration* > *Mobile App* > *Intro Pages*.

The intro pages configured here can serve as welcome pages, so that users do not see the Marketing Planner immediately after logging in. Multiple pages can be created that will be displayed in the exact order you specify once the app is launched.



You can delete a start page or shift its sequence up or down using the context menu **...** that follows the page number. App users can subsequently exit the intro and jump directly to the application by using a definable button. No button will be displayed if no button text is defined. This also means that the user will not be able to skip a multi-page intro.

2.4 Other functional extensions and changes

Feature	Description
Homepage	*Fusion* and *Mobile App* can be accessed directly from the overview.
New *Mobile* administration menu	The *Skinning for BrandMaker App* settings page has been moved from *Look & Feel* to the new *Mobile App* menu item.
Standardized file size calculation	From version 7.3 onwards, only units like KB, MB, GB are used, and the BrandMaker application displays file sizes calculated using the power of two (x^2) only. Only KB, MB, GB are used in the core application for upload operations. Previously, size calculations sometimes involved a mix of, for example, KiB (1024 bytes) and KB (1000 bytes), which did not give consistent and correct results. New corrected sizes are now displayed in the header when using the file upload service.
First day of the week	The first day of a week is now set, for example, in the calendar > *User Settings > Absences* based on the user's language setting, so for example Sunday for en-US and Monday for de-DE.

2.5 System Settings

With version 7.3, the following Brand Template Builder system setting was removed from Administration:

Name	Typ	Default	Beschreibung
w2p.functionality.workflows.template (before Version 5.8: org.template.workflows.enabled)	[true; false]	true	Turn on or off workflows from config module for advert templates.

The internal structure of Brand Template Builder has been subject to a technical overhaul. If it would have been set to `false`, this setting no longer serves any purpose, since this option was phased out a few versions ago. As a consequence, the above setting no longer exists.

From now on, all systems will operate as if this setting had been configured to `true`. You therefore do not need to take any action as a result of this discontinuation.

3 Marketing Planner

3.1 Split orders

Orders are sometimes prepared by several departments of a company together in order to obtain better conditions:

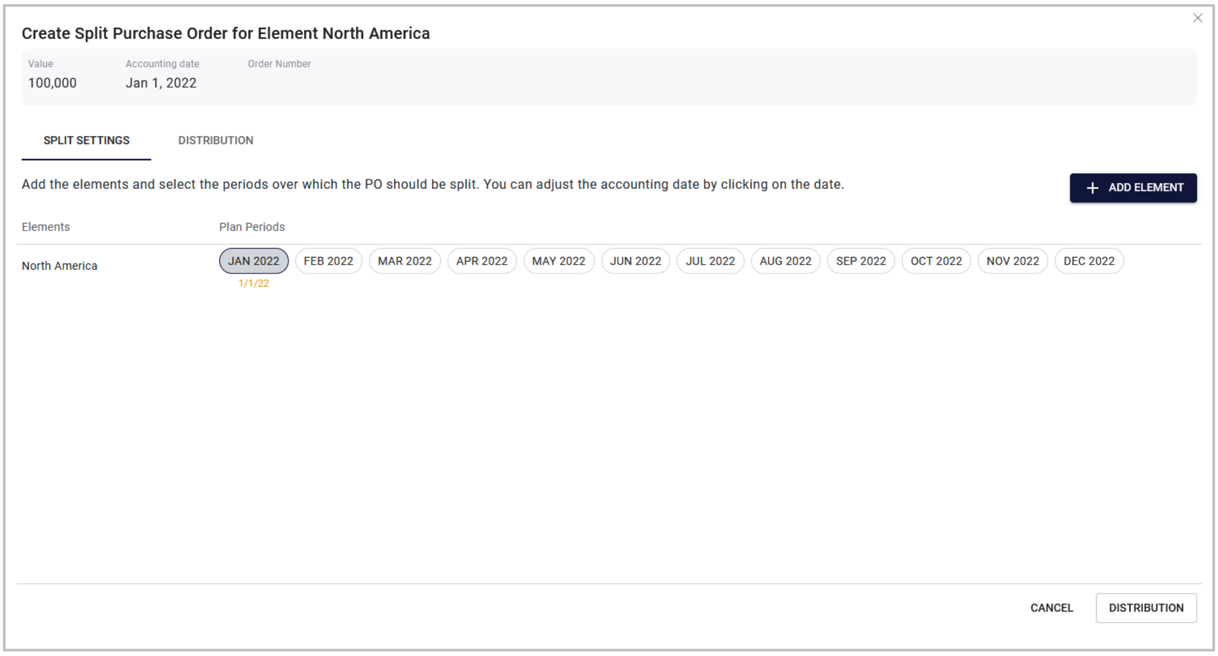
Example

Three departments buy goods together because this gives them lower prices. Department A is responsible for 50% of the purchase volume and will use the merchandise for a careers fair between March 5 and March 15. Department B is responsible for 30% of the purchase volume and will use the merchandise for a customer loyalty campaign between June 2 and June 29. Department C is responsible for 20% of the purchase volume and will use the merchandise for an internal event in December. When ordering, the budgets of the particular groups are to be charged with the correct amount in the relevant month.

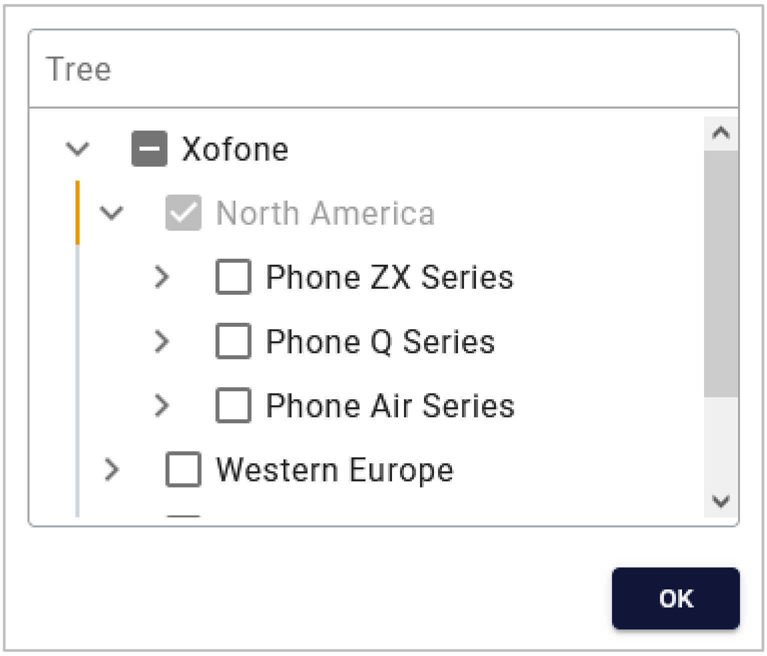
Another example is a large order from a department that is called off in several stages over a year.

Previously, these scenarios had to be mapped manually in Marketing Planner through individual orders, and it was difficult or impossible for employees with budget responsibility to understand the interrelationships. For this reason, version 7.3 introduces the possibility to split standard orders.

Using this function, a budget manager can automatically create the individual partial orders based on a standard order representing the total order. The interrelationships are always preserved and the partial orders can continue to be processed. The screenshot below shows the dialog for splitting a standard order:

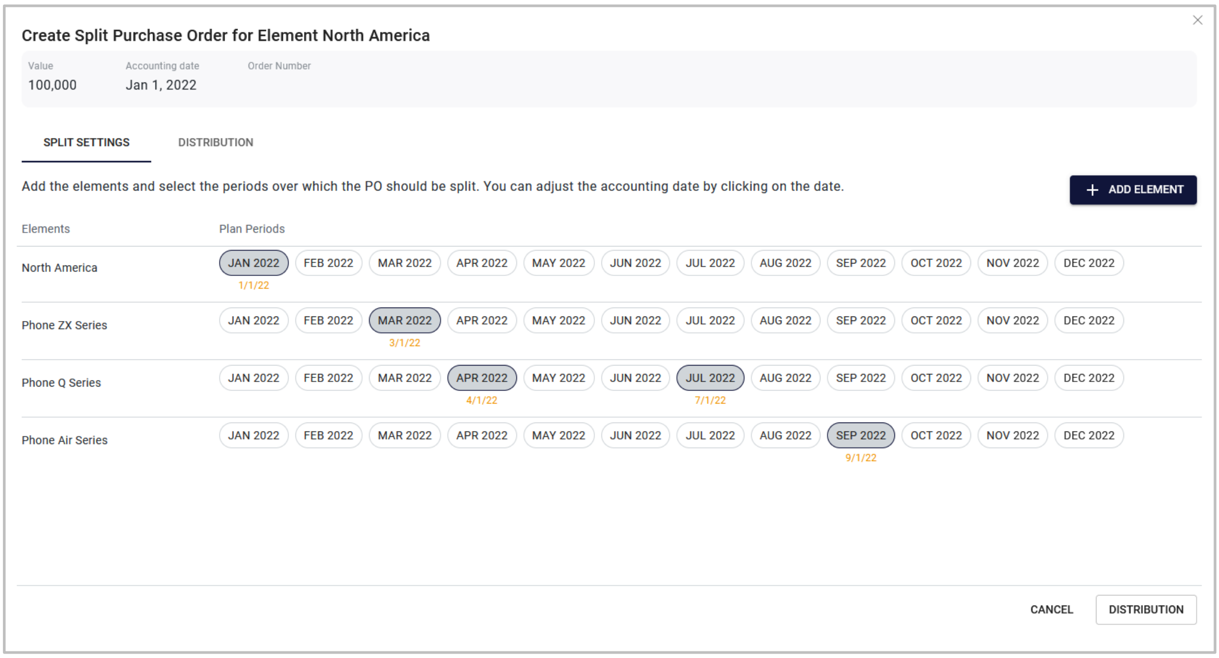


The budget manager can freely allocate the order value to planning elements and time periods. The user clicks on *Add element* if an order is to be split into several elements. A dialog will then display the tree with the elements to which the user has access:

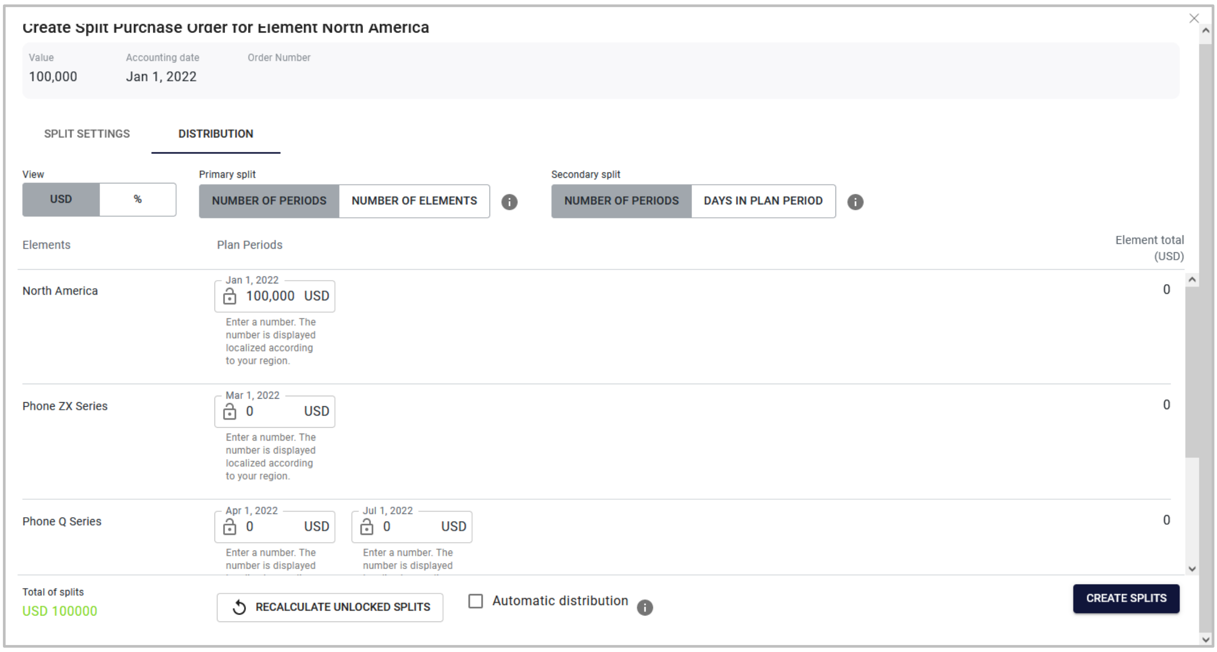


In this dialog, the user can select those elements for which one or more split orders are to be created.

The user can now specify in the overview the months for which the split orders are to be created. When the user clicks on a month, the 1st of each month is entered, but clicking on the date opens the month, allowing the date to be adjusted.



The user then switches to the *Distribution* tab in order to set the value of the partial orders. The value of the standard order can be split manually or automatically.



If user chooses to split it manually, they edit each entry in the list and enter the value. In this case, it is also possible for the user to choose not to split the value of the standard order, but to enter additional values for the partial orders. With a manual split, all amounts are locked for further processing (padlock symbol in the input field).

If the user chooses to split automatically, they set up a rule in the *Primary split* and *Secondary split* fields. The following rules can be selected:

- *Primary split*:
  - Number of selected periods (months)

  or

  - Number of selected elements
- *Secondary split*:
  - Number of selected periods (months)

  or

  - Number of days in the planning period

Example

The standard order has a value of USD 100,000. The user selects the following rules for splitting:

- *Primary split*: Number of elements
- *Secondary split*: Number of selected periods (months)

For the above example with 4 selected elements, each element receives USD 25,000; for the element with two activated periods, the USD 25,000 is split between the two partial orders of USD 12,500 each.

It is additionally possible to assign money to partial orders, then lock them and split the remaining value among the unlocked partial orders based on the rules.

The split orders will be created for the corresponding elements once the user has set up the split. Each split order is assigned an ID consisting of an automatically defined group ID and sequential numbering for the split orders.
Split orders are indicated with the  icon in the detailed view on the *Orders* tab. When the user clicks on the icon, a dialog opens listing all partial orders. Further splitting of the split order is then only possible manually.

Import

Alternatively, split orders can be created through import. In this case, the data of the split orders are created as separate entries in the import file and combined by means of a group number. Please note that the group number is only relevant for the summary during import. When the split orders are created, the order group is automatically assigned the group ID followed by sequential numbering for each split order.

Other changes

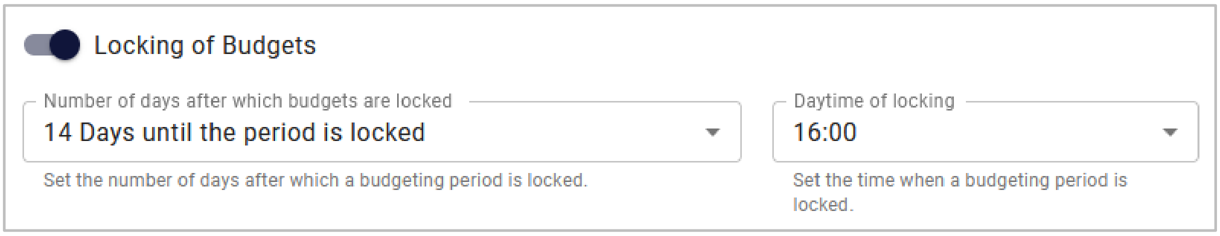
Creating, editing and deleting split orders is recorded in the audit log. Users can also search for split orders by sequential number using the search function on the dashboard.

3.2 Locking the planned and target budget with rollover

From version 7.3 onwards, the administrator can set up automatic locking of the planned and target budget of a previous month centrally for your system. A planned or target budget cannot be processed once it has been locked for a month.

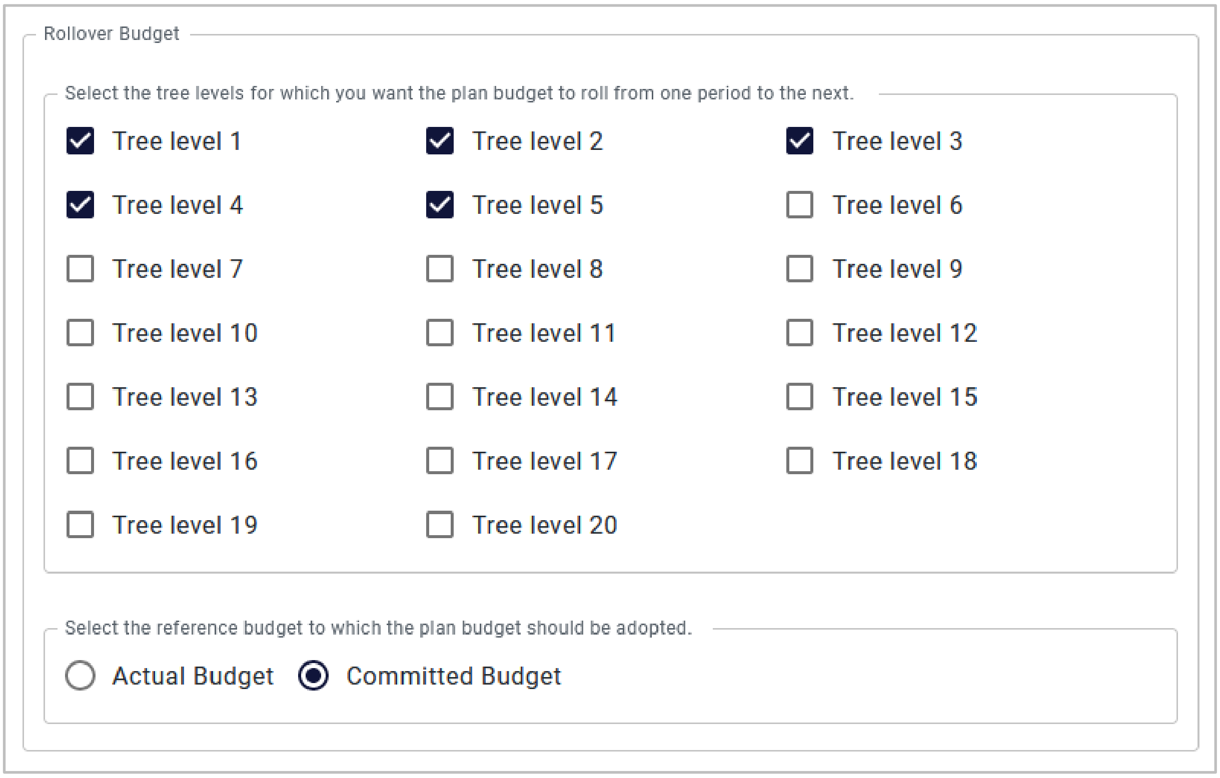
The administrator can access the relevant functions on the > *Settings* > *Budget* page if their role has the MAPS_MANAGE_LOCK_BUDGETS permission, see chapter 16.1.

The time from which the budgets are locked is specified by the administrator in days after the end of the month and a time of day (based on the server time).



The administrator with the above right can also edit the locking of past periods, i.e. unlock and reactivate them.

The administrator can also activate the rollover function for specific element levels. The rollover is accounted for with the locking of the plan budget. Here, the difference between the plan budget and the actual or commissioned budget of the previous month is added to the plan budget of the following month. Note that there is no rollover at the end of a fiscal year.



The user can recognize when a plan budget is adjusted by a rollover by corresponding entries in the detail view on the *Plan budget* tab.

It is also possible to lock budgets via Rest interface.

3.3 Other functional extensions and changes

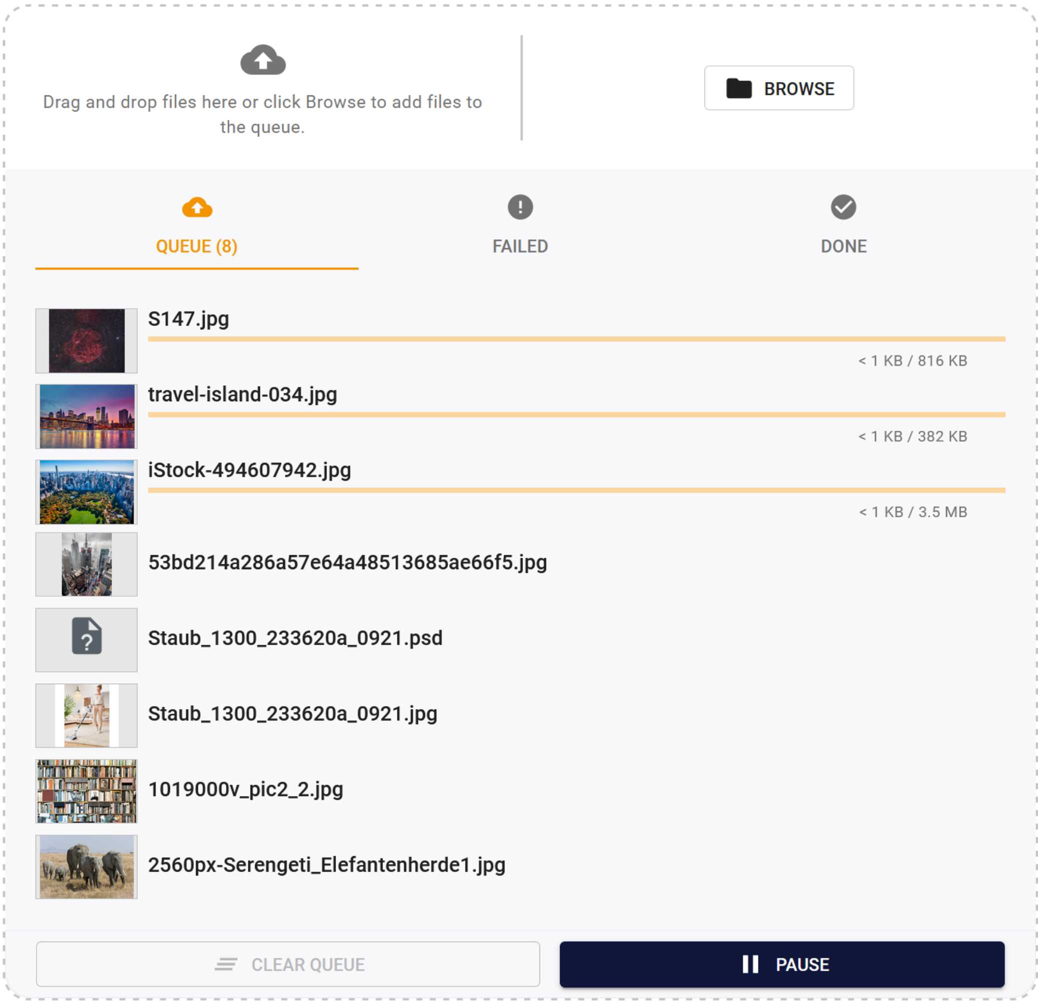
Feature	Description
Input using the currency of the budget view	Budget data can be displayed in the budget view either in the reference currency or in the working currency. Previously, if data were entered for elements with a different working currency when displayed in the reference currency, then the number entered was interpreted as a value in the working currency and automatically converted to the reference currency. As a result, the entered value and the displayed value were different. This behavior has changed from version 7.3 onwards. An entered value is now always interpreted in the currency of the selected representation. Related to this is the change that values can only be entered in the reference currency if an exchange rate is also defined for the relevant period and currency.
Default budget view	From version 7.3 onwards, an administrator can set a default budget view for all users who have access to the budget view. The administrator can access the function only if the new MAPS_MANAGE_BUDGET_DEFAULT_VIEW permission is assigned to their role, see chapter 16.1.
Cancel year creation	Starting with version 7.3, it is possible to cancel the creation of a year.
Currency column tooltip	The currency column in the budget view now has a tooltip from version 7.3 onwards. The tooltip shows the reference and working currencies of the element over whose line the mouse pointer is currently positioned.
Customized budget columns	Previously, the user could only choose between working and reference currency or primary and secondary exchange rate when calculating customer-specific budget columns. Starting with version 7.3, these choices are now set up in the dialog for specifying the calculation formula. Existing formulas reference the working currency during a migration.
Naming of weeks in the calendar	Naming starts with the fiscal year since version 7.2: the first full week in the new fiscal year is given the name KW1. From version 7.3 onwards, it is possible to choose numbering by fiscal or by calendar year. The setting can be defined by an administrator under > *Settings* > *General*.

Feature	Description
Currency of an element	Previously, it was possible to change the currency of an element at any time. However, this could lead to incorrect budget data when budget data had already been entered. As of version 7.3, currency editing is disabled as soon as budget data are entered for an element.

4 Media Pool

4.1 Upload

We already started to improve the import of files in version 7.2, with the first module being the revised function in the Job Manager. Starting with version 7.3, Media Pool also uses the revised import function, which features improved usability and increased performance.



4.2 Asset types

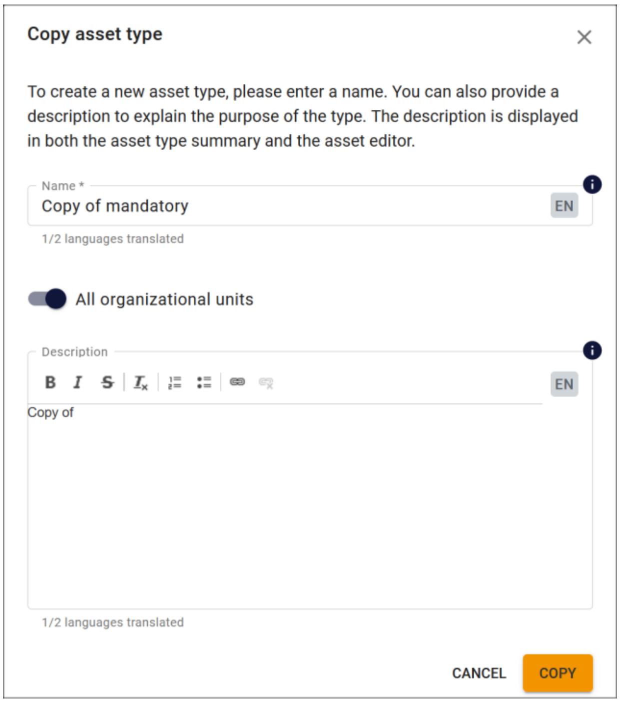
The following changes for asset types have been introduced with version 7.3.

Copy asset type

Previously it was a time-consuming task to create all asset types from scratch if the asset types differed only minimally from each other. From version 7.3 onwards, administrators can now copy existing asset types in the asset type overview using the new icon.

Clicking on opens the *Copy asset type* dialog with the following parameters:

- Name: it is preceded by *Copy of* as a prefix.
- The selected organizational units of the copied asset type remain preselected.
- The description of the copied asset type is retained.



Configured attributes and groups are automatically transferred from the original to the newly created asset type.

Edit asset type

Groups are now automatically expanded (^) when created within an asset type. This allows the user to add more attributes faster from the column with all available attributes of the group using drag-and-drop.

When editing an existing asset type using the pencil icon, groups open in expanded mode and all existing group attributes are immediately visible.

Up to version 7.2, no selection for *Org. units* in the *Edit asset type* dialog meant that the asset type was assigned to all organizational units - even if the organizational units are later modified. The setting was not intuitive unless you read the help text in the tooltip about it.

Instead of the menu, the dialog now opens by default with a button activated for *All organizational units*. Only when the switch is deactivated does the *Org. units* selection menu open and the administrator can make specific assignments to individual organizational units.

4.3 Other functional extensions and changes

Feature	Description
Asset filter for webhook administration	Asset filters have been added to webhook administration starting with version 7.3. *> Administration > Assets > Integration > Webhooks* takes you to the settings. You can edit a webhook using the pencil icon. The *Settings* tab lets you choose whether to use a filter (*Filter published assets*) or not (*All published assets*). There are three choices for the filter: • VDBs • Categories • Publication channels The user can decide whether to match all selected fields or only some of them. (Can be selected via the radio buttons *All fields match*, *Any fields match*). The asset that matches at least one of the values is filtered for each individual criterion. Example: VDB 1 and VDB 2 have been selected. Assets based on VDB 1 OR on VDB 2 will be included.
Introduction of new webhook events	New event triggers for webhooks also take approval workflows into account starting with version 7.3: • APPROVAL_REQUESTED, start of the approval workflow for an asset is displayed. • APPROVAL_GRANTED when the approval workflow for an asset is complete. Events are triggered for the following two types of workflow: version upload and metadata change. The changes (new version, change of metadata) are binding and must be synchronized as soon as the asset has been approved. This therefore does not apply earlier in an intermediate step of the workflow.

Feature	Description
New AI tagging functions	AI tagging is enhanced in version 7.3 to include the following functions: • Tags that are automatically generated by AI can be viewed and deleted individually. This allows users to weed out the tags that do not match the asset so well. It is possible to change the language of the AI tags. The default is the system language set for the user. • Adobe PSD files can now be automatically tagged by AI through an analysis of their large preview. • Users who have the right to edit the asset can use the *Auto-populate tags* command to manually trigger AI tagging for a single selected asset.
Widgets	The user experience in Widget has been improved in version 7.3 as follows: • It is now possible to select multiple VDBs when creating a search filter in the *Asset management* widget. The VDB list is now sorted alphabetically. • Lists in which a user is selected are now sorted alphabetically by last name.
Search: increased error tolerance for data inconsistency	Initial reading and parsing of data has been improved in version 7.3 so that data inconsistencies in a single asset do not affect the entire search interface. Users can continue to work. This customization covers the following cases: missing asset name, file name, asset ID, VDB, categories, deleted file extension (in Media Pool Administration), missing file extension, deleted owner, current version deleted, uploadApprovalData for asset in a workflow missing and asset type=NULL.
Asset preview	Alternative previews: when an asset has been assigned an alternative preview, it will now also be displayed on the *Variants* tab. So far, image assets (e.g. PNG) with transparent backgrounds were given a checkerboard pattern as background in their preview (JPEG). In version 7.3, if a large transparent preview is available for the asset, this large (transparent) preview will always be used to send it to the AI service. This paves the way to be able to correctly display the preview for transparent images in an upcoming version.
Enhanced user experience	Users will now see a tooltip for the five icon buttons on each asset during a mouseover, explaining what the button under the mouse pointer does in detail.

Feature	Description
Transfer asset to another user	The *Change asset owner* menu command is now also available from the ⋮ menu on the individual asset in the search. Previously, this was only possible with multiple selection and batch processing via > *Menu ...* > *Edit* > *Transfer owner*. **Note**: This option is available to the asset owner and users with the CHANGE_ASSET_OWNERSHIP permission. Previously, only the latter could reassign assets, now the asset owner can do so as well.
Publishing	When the *Publish* button is grayed out and inactive, a tooltip on mouseover now provides a brief explanation of the cause and a possible fix. For example, 'The selected rendering scheme is not valid'.
Improved indexing	Assets created, deleted or updated during the full re-indexing process are correctly included in the newly created overall index. All the edited assets are re-indexed in the last indexing pass. This ensures that changes made during indexing are also considered.

4.4 Discontinuations

Please note that the SOAP interface of the *Media Pool* module will be discontinued in version 7.5. For this reason, the previous REST interface will be relaunched in version 7.4 and will then be able to completely replace the SOAP interface.
Make sure to switch to the REST API in time if you are still using the SOAP interface.

5 Brand Template Builder

5.1 Enhancements to online templates and documents

Version 7.3 implements the following enhancements to online templates and online documents:

- The *validity* attribute has not yet been implemented for online templates. Online templates and the documents based on them are given this feature in version 7.3 and can only be found if the documents are valid, if the role of a user has appropriate permissions, or if finding invalid templates and documents is explicitly enabled in the advanced search function.
- The rendering process, which can take a long time depending on the template, has been optimized. Users can continue working and are informed about the process running in the background by a throbber.
- The display of error messages in the online editor has been given a higher priority than hints from version 7.3 onwards.

5.2 Tables

It is already possible to create tables in text variables or to copy tables from an Excel file. Version 7.3 introduces a table import function. Please note that the import of tables must be enabled in the editor configuration used so that the document creator can use the import function.

It is now possible to import a table and set it up as a new table or overwrite an existing table. Linked cells are also taken into account. Importing data from XLSX files is supported.

The document creator clicks on  and selects a file to import a table. The file is then validated. Please note that only 20 columns and 100 rows can be imported. Formulas cannot be transferred, only their results.

The data are imported after the validations have been completed. The following applies: if the cursor is located in an existing table, the table will be updated. If the cursor is positioned outside a table, a new table will be created.

Special aspects when overwriting a table

The following special aspects apply when an existing table is overwritten:

- The table is always filled starting from the top left cell, regardless of where the cursor is positioned in the table.
- Additional cells will be created if the target table in the document is smaller than the source table. Any additional cells in the target table will not be changed if the target table is larger than the source table.
- The target table in the document determines how the data from the source table are inserted when cells are linked. The following applies to a linked cell in the target table:
    - If cells are linked in the target table but not in the source table, the data of the cells from the source table will be written to the linked cell of the target table.

  - If cells are linked in the source table but not in the target table, the data from the linked cell will be written to the first cell of the target table.

Other changes

The dialog for editing tables in the document editor is now opened in full-screen mode to provide better editing options.
In addition, tables are initially created in the width of the box when they are inserted.

5.3 Other functional extensions and changes

Feature	Description
Multilingual input	Previously, multilingual input could be entered in a rather awkward syntax using the ~ character. From version 7.3 onwards, this form of input will be discontinued and multilingual fields will be filled exclusively via the dialog. Export and import are backward compatible and can map any old syntax that may still be present. Please note the related database changes, see chapter 17.2.
Remove unneeded permissions	The *meta templates* feature was removed in version 6.5. Permissions for the feature have been visible in the UI since then, but had no function. These permissions have been removed from version 7.3: • HANDLE_MANUAL_INSTANCE_REQUEST • GET_MANUAL_INSTANCE_REQUEST • META_TEMPLATE_ORDER_NEW_FORMAT • MANAGE_META_TEMPLATES
Searching for assets	From version 7.3 onwards, the asset search is always displayed in full screen mode.
Other channels	Version 7.0 added the *Channels* property to format groups. Since then, administrators have been able to assign *Print,*, *Banner ad*, *Social media*, *E-mail*, and landing page channels to format groups. Starting with version 7.3, it is possible to combine other channels with the channel designation *Other* in order to cover additional channels.
Transferring print data during copying	Previously, the data from step 4 of the Customizing Wizard were not transferred when copying a document. This has been changed in version 7.3 and the data are now copied, but can still be modified.

Feature	Description
Access to documents by approvers	Starting with version 7.3, approvers can always access the documents to be checked, allowing them to perform their tasks, even if they do not have regular access through VDB access or by assigning an ORG unit or a category.
Support for InDesign 2022	The *Brand Template Builder* module supports InDesign 2022 from version 7.3 onwards.
Highlighting step 6	To make users aware that a document needs to be finalized in step 6 of the customizing wizard, the button is highlighted from version 7.3 onwards as soon as it is possible to finalize the document.
Output methods page updated	The > *Administration* > *Brand Templates* > *Output Methods* page has been redesigned in version 7.3. Functionality has not changed except for the input of multilingual fields.

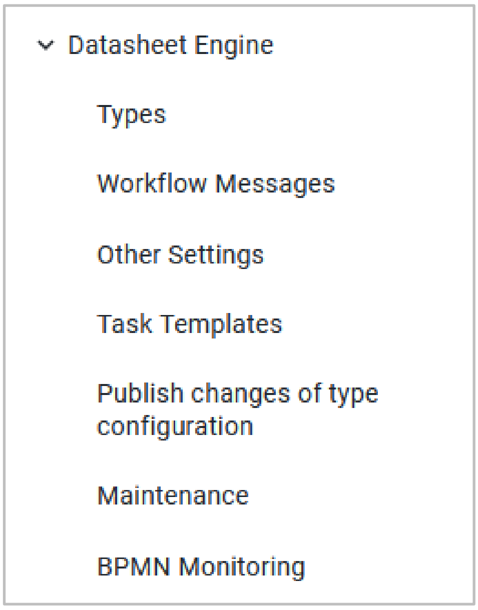
5.4 Discontinuations

As of version 7.4, it will no longer be possible to configure *Dynamic Smart Grid* in new Brand Template Builder templates. All your legacy templates that already contain Dynamic Smart Grids will continue to work, however.

6 Job Manager and Marketing Data Hub

6.1 Consolidation and administration redesign

The introduction of processes with BPMN workflows in past releases resulted in numerous innovations in the administration of the Job Manager and the Marketing Data Hub. The structure of the administration has been consolidated in version 7.3:



All types are now maintained in the topmost entry. When an administrator opens a type, they now have overall access to the following functions:

- Set up datasheet layout
- Manage workflow
- Manage variables
- Set up access to variables
- Publish type changes

In addition, category management and other settings are now available on the *Other settings* page for the *Job Manager* and *Marketing Data Hub* modules.

Delete process types

Previously, it was not possible to delete process types once they had been created. This function has been implemented starting with version 7.3. Administrators can delete any displayed process type under *> Administration > Datasheet Engine > Types.*
Deletion is only possible if no job or process is active based on the type. If deletion is possible, the type will be opened, allowing the administrator to then delete the type or abort deletion.

Processes that have already been canceled and terminated cannot be reactivated if the associated type is deleted.

Migration

All types in version 7.3 must be migrated due to the extensive changes. This migration must be performed on the new *Maintenance* page when upgrading to version 7.3. Users can only open and create jobs, processes and data objects again following migration.

6.2 Datasheet layout

In version 7.3, datasheet layout functions have been updated and modified to a modern layout. In addition, the update gives users more design options. Variables can now be inserted in up to 4 columns. Administrators can set up collapsible columns and rows so that users can clearly display fields in the job, process or data object.
A user can now also collapse the job discussion on the datasheet, allowing the datasheet tabs to be displayed in a larger space.

7 Job Manager

7.1 Resource management

Resource management was introduced in version 7.2 and has been extended in version 7.3.

> **Note**
>
> Resource management cannot be used in Firefox browser versions 92 and 93.

Display multiple teams

From version 7.3 onwards, multiple teams can be displayed on the *Resources* page of the *Job Manager* module. Team members are displayed grouped by team. If a user belongs to more than one team, they will only be included in the first team listed. Users who do not belong to a team are listed under *Not grouped*.

Company vacations and public holidays

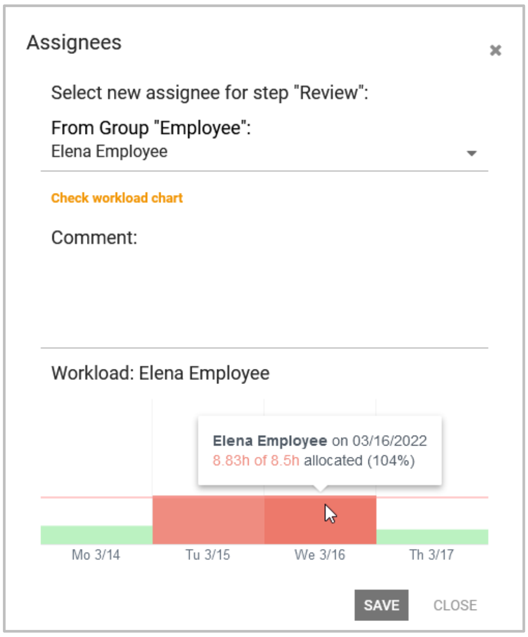
Starting from version 7.3, an administrator can set up calendars for the company or user groups under *> Administration > Users & Groups > Company Vacations and Holidays* and set up corresponding non-working days in them. In addition, calendar data can be imported in various formats. For details, please refer to Chapter 2.1.

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

Improved work assignment

Previously, the *Resource management* page only displayed tasks and workflow steps that were assigned to one or more users on a datasheet.
From version 7.3 onwards, the button on the *Resource management* page can be used to access a list of all unassigned workflow steps and tasks. Each task can be opened and assigned to users. A start and end date as well as users from the assigned user groups can be selected for the list of unassigned workflow steps; individual assignment is not possible for workflow steps.

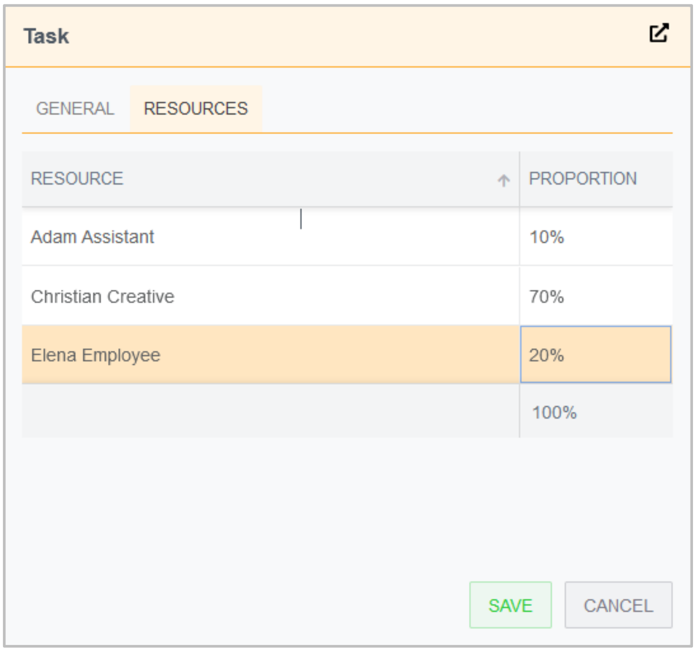
Additionally, it is now possible to check the workload when assigning a user to a workflow step on the datasheet:



Individual allocation of tasks

If a task is assigned to several users, the allocation among the users is equal by default. From version 7.3 onwards, task allocation can be set individually, for example user A handles 20% of the task, user B 35% and user C 45%. The sum of the proportions must always be 100%.

Users can access the allocation dialog by double-clicking on a task; the proportion can then be entered on the *Resources* tab in the dialog that is displayed:



Enhanced overview

The *name of a task (name of the job/process)* is displayed on the bars representing the tasks under > *Job Manager > Resources* in order to provide a better overview of resource allocation. When the cursor is positioned over a day in a user's row of the workload diagram, a tooltip will appear showing the user's workload on that day.

7.2 BPMN workflows

The following changes have been implemented for BPMN workflows in version 7.3:

Script tasks

The range of functions for BPMN workflows has been extended in version 7.3 to include script tasks, allowing complex decision-making logic to be mapped. As with service tasks, an error handler can be used.

Display when multiple workflow steps are active

Multiple workflow steps can be active simultaneously and allocated to agents or user groups in BPMN workflows. However, if only one workflow step was assigned to a user, the user had to choose from all active steps. This behavior has been replaced by the following logic in version 7.3:

- When a workflow step is assigned to a user, the datasheet of the process for editing the step is opened directly.
- When multiple workflow steps are assigned to the user or their user group, a dialog opens where the user can select one of the steps for processing.

This logic is also used when a process from another module is opened.

Changes

From version 7.3 onwards, changes to be published are only created for BPMN workflows if the administrator has changed the functionality of the workflow. For example, changing labels and moving elements in the editor without changing the links no longer need to be published as a change.

Creator of a sub-process

When configuring a sub-process, the administrator can specify that the current editor of the parent process is automatically entered as the creator of the sub-process.

7.3 Other functional extensions and changes

Feature	Description
Synchronizing planning elements and jobs/processes	Version 7.3 introduces the following changes to synchronization: • The ID column is no longer displayed for time periods because knowledge of the technical identifier is not necessary for synchronization. • Changes to data on the planning element are now also matched when the datasheet of the process is opened or saved, with data being written to the target fields without buffering.
Review of web pages	Previously, assets and locally stored files could be attached to a job or process. From version 7.3 onwards, web pages can also be added by means of a URL. This allows reviews for web pages to be started in a single job or process. Please refer to the Review Manager documentation for details.
Time tracking page	The > *Time tracking* page in the module has been revised and is displayed in a new design. The mode of operation remains the same.
Revised API	Parts of the API interface for jobs and processes have been revised in version 7.3. Please refer to the documentation on our Developer Portal for details.
Message-Based Integration (MBI)	From version 7.3 onwards, events are sent that can be received by a consumer via webhook. Events have already been implemented for the following functions in the Job Manager: • Job created • Job saved • Job deleted • Job forwarded • Job terminated • Job canceled
Downloading multiple files	Starting with version 7.3, a user can mark multiple assets or uploaded files and download or e-mail them in a single step.

7.4 Discontinuations

7.4.1 SOAP interface

Please note that the SOAP interface of the *Job Manager* module will be discontinued in version 7.5. For this reason, the previous REST interface will be relaunched in version 7.4 and will then be able to completely replace the SOAP interface.
Make sure to switch to the REST API in time if you are still using the SOAP interface.

7.4.2 Page *Reports*

In version 7.4, the page *> Jobs > Reports* will be discontinued.

8 Marketing Data Hub

8.1 Other functional extensions and changes

Feature	Description
Time tracking page	The > *Time tracking* page in the module has been revised and is displayed in a new design. The mode of operation remains the same.
Web pages	Previously, assets and locally stored files could be attached to a job or process. From version 7.3 onwards, web pages can also be attached by means of a URL.

8.2 Discontinuations

8.2.1 SOAP interface

Please note that the SOAP interface of the *Marketing Data Hub* module will be discontinued in version 7.5. For this reason, the previous REST interface will be relaunched in version 7.4 and will then be able to completely replace the SOAP interface.
Make sure to switch to the REST API in time if you are still using the SOAP interface.

8.2.2 Page *Reports*

In version 7.4, the page > *Data Hub* > *Reports* will be discontinued.

9 Review Manager

The Review Manager module in version 7.3 has been completely redesigned and new functions have been added. Reviewers work in a standardized, modern user interface, and there are numerous enhancements and new features.

Note

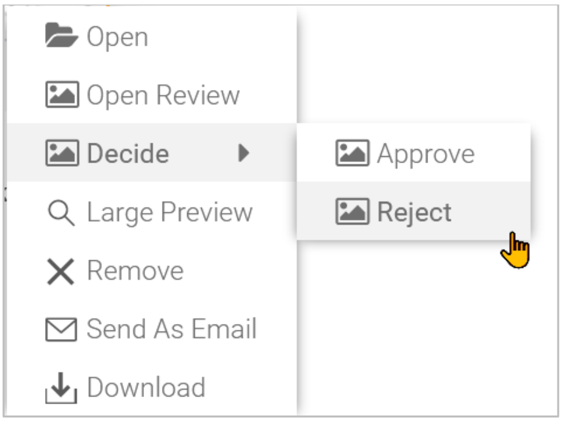
This revision is only visible in version 7.3 for reviews that are started directly in the Review Manager or in a job or process.

Besides the complete facelift, the most important new feature is that you can now see, comment, accept or reject other participants' comments in real time without reloading.

The following file formats and suffixes are initially supported in Review Manager 7.3:

- PDF
- JPEG, JPG
- PNG
- MP4
- DOCX, DOC
- PPTX, PPT
- XLSX, XLS

A review is usually started from a job. Corresponding menu commands are available in the asset menu for the files added to a job. The review is started with *Start review* and participants can be added on the *General* tab.



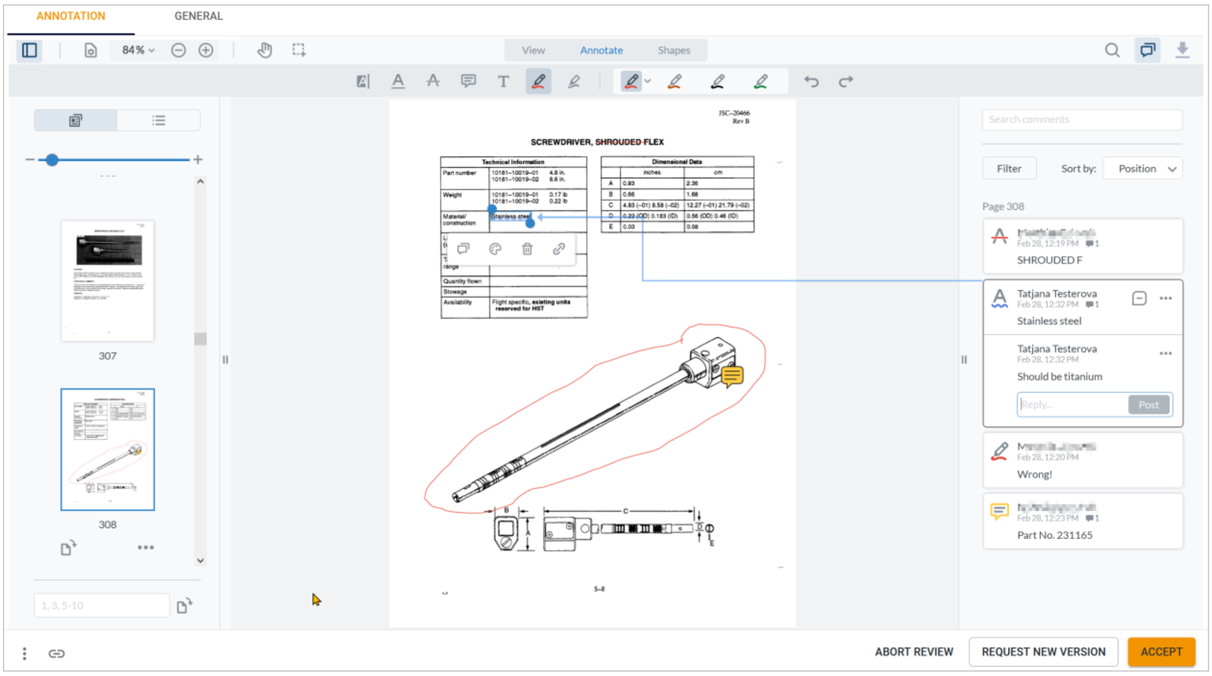
Notes

Parts of the new interface are not displayed in all standard languages. Fallback language is English (en-US).

9.1 Annotation tools

The Review main window provides a number of annotation tools, most of which correspond to the usual standard.

Overview



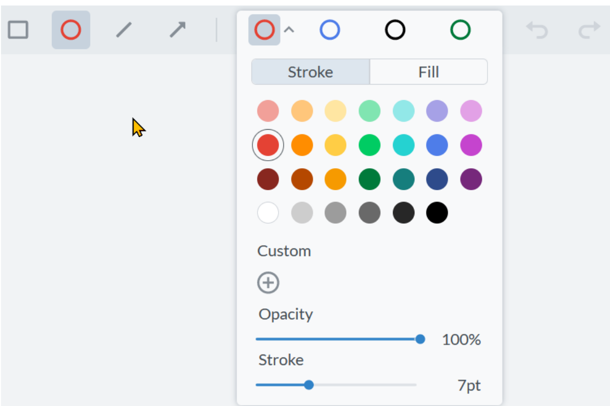
You can switch the display using the three tabs *View*, *Annotate* and *Shapes*.

Text annotations

The *Annotate* tab includes text tools for e.g. strikethrough, highlighting, underlining, coloring, and free text.

Shapes

The *Shapes* tab contains shapes, lines, arrow and polygon tools, as well as tools for freehand drawing.



In addition to the function in the toolbar, Ctrl-Z/CMD-Z can also be used to undo an annotation.

Users can click on review icons and shapes directly on the page. An arrow then indicates the content for this element in the sidebar. Conversely, the user can click on an annotation text in the annotation list and the application will also display an arrow for the related annotation and jump to the corresponding page.

Floating tool palette

The tool palette for your own comments looks like this:

These icons have the following function (from left to right):

- Add comment
- Adjust color, stroke width and transparency
- Delete annotation
- Create link to page in review or to URL

Rotating objects

A rotation tool is available for lines, arrows, drawings and shapes.

Click on the tool and hold down the mouse button while dragging to rotate in the desired direction.

Users normally have only two options for comments from other participants: Comment and Add link.

9.2 Icons and menu commands

These elements are available in all three tabs of the Review Manager.

Show/hide 

Shows or hides the left sidebar with the thumbnail overview.

View 

The page display and navigation menu are located below this button.

Zoom 

You can set a fixed percentage value, choose one from the drop-down menu, or adjust the zoom factor manually using +/-.

Page orientation

This icon rotates the page/selection through 90° in a clockwise direction. The **...** menu next to it contains the counterpart and you can rotate the page/selection 90° in a counterclockwise direction. You can selectively rotate individual pages or a selected area by holding down the Shift key. A page range, such as 23-65 or 55, 58, 60, can also be specified in a text box below the thumbnails and rotated.

Panning

You can also access the hand tool for moving the image section from the keyboard by pressing the P key.

Search

The search function searches document contents, and filters them according to the search term.

Comments

Clicking on this button will show or hide the sidebar with the review comments. There is a search box above the list specifically just for comments. The *Filter* button will help you with your search. You can filter annotations by specific people, colors, shapes, or statuses. The comment list can be sorted by six criteria.

Download

The Download button allows users to download the current version of an open review as a PDF, including all annotations, to their local device.

The ⋮ menu in the footer section of the review provides the following functions:

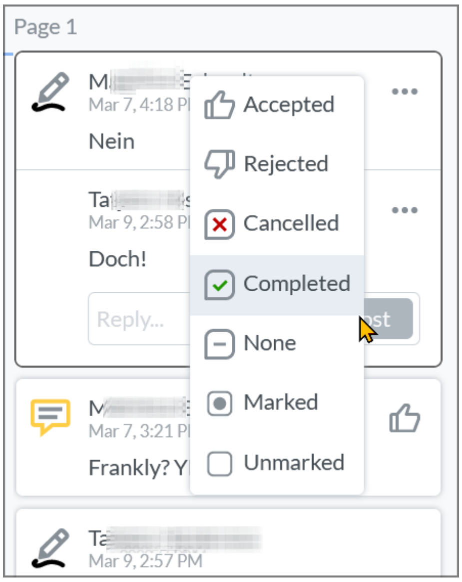
Menu command	Description
Download media	Opens the download dialog for the asset, as in the previous implementation.
Detail view	Opens the detail dialog of the asset, as in the previous implementation.
Upload new version	This feature is visible only to the owner of the review iteration and to the uploader.

Link

This button next to the ⋮ menu copies the link to the review to the user's clipboard.

Annotation status

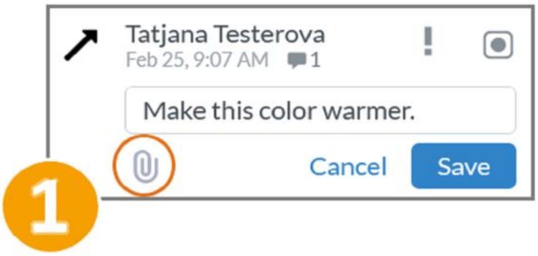
Annotations in the review can be individually assigned a status via the menu.

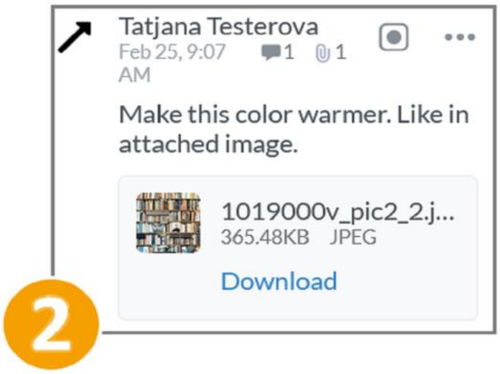


You can make individual text adjustments and new menu items under > *Administration* > *Data Structures & Workflows* > *Custom Objects* under *Review Manager Annotations Classification*.

Attachments

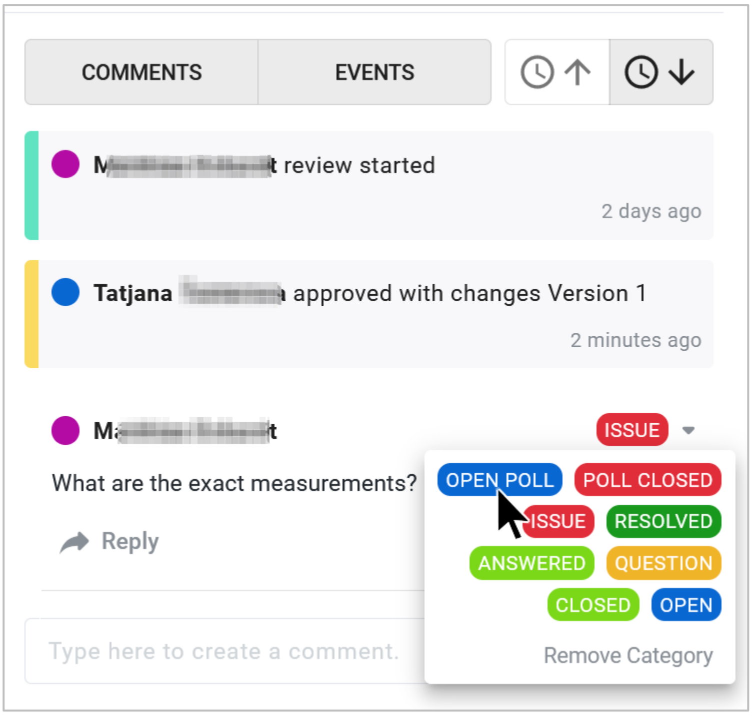
An additional file can be uploaded as an attachment to each annotation.





9.3 Global comments

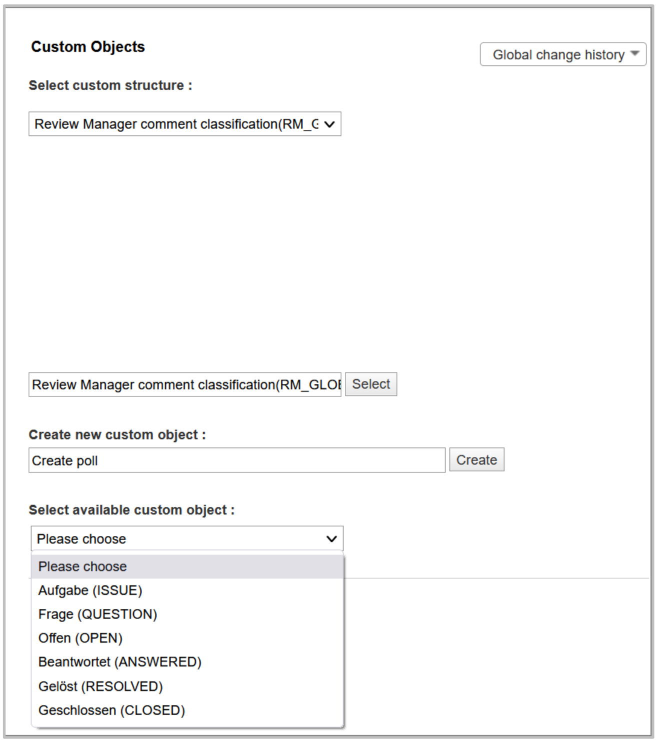
Users have the ability to access comments here that do not relate to a specific page within Review Manager. They may comment and reply to comments.



There is also the option to mark comments. For this comment component, a custom structure and custom objects are possible to allow users to define their own classification for the comments.

In the delivery state, users are allowed to assign the following classifications:

- Task
- Question
- Open
- Answered
- Resolved
- Closed



9.4 Critical function change

Note that the Review Manager module will be transformed into a service for other modules. This strategic change means that reviews will no longer be launched from the top navigation, but only to objects such as jobs or processes. This includes the integration of a to-do list for upcoming reviews in dashboards. The first step towards reviews as a service for other modules will be taken with version 7.4.

10 Dashboard

10.1 Expanded widget functionality

The two widgets *Link* and *Link Carousel* have been expanded with the following options for communication:

- **`mailto`**

  Example: `mailto:name@domain.com` opens a new e-mail draft to the recipient preset in the widget in the local e-mail client. Subject, CC, BCC and Body are available as additional optional parameters.

  Example with prefilled subject: `mailto:name@domain.com?subject=Urgent`

  `tel`

  Example: `tel:+15555551212` starts a call via telephone services software.

- **`skype`**

  Example: `skype:profile_name` calls the Skype name using Skype.

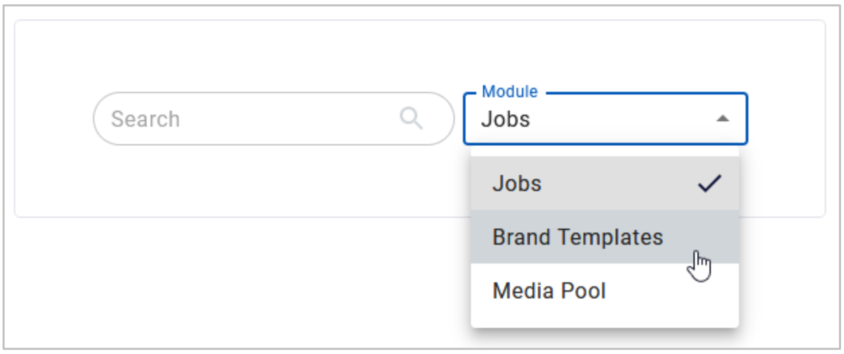
- **`Callto`**

  Example: `callto:userid@domain.com` starts a call via Microsoft Teams.

10.2 Search widget

The dashboard features a new widget with a simple search function. This enables a direct search query in the five modules *Media Pool (Assets)*, *Marketing Data Hub*, *Job Manager (Jobs)*, *Brand Template*, and *Shop* from the dashboard.

The administrator can specify during creation whether only a specific module is to be searched, or whether the user can select the module to be searched individually from a drop-down menu.



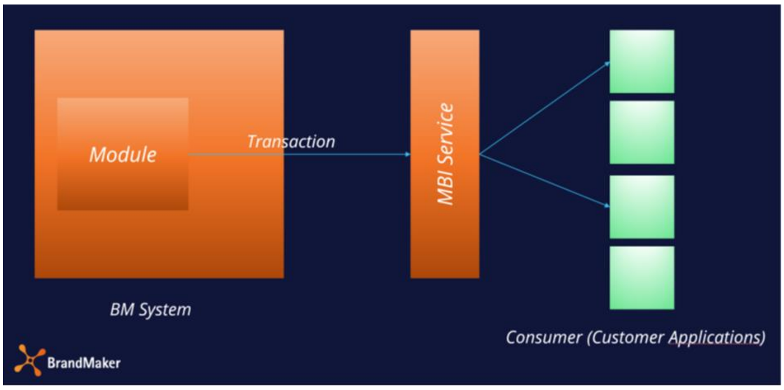
The entered search term is passed to the module's search function.

11 Fusion

Starting with Release 7.3, BrandMaker provides the *Message-Based Integration Service* (MBI). This elementary service within Fusion is used for integrating the BrandMaker system on the customer side into the customer-specific infrastructure via REST API. Information on MBI can be found on the Developer Portal and in the BrandMaker Version 7.3 manuals.

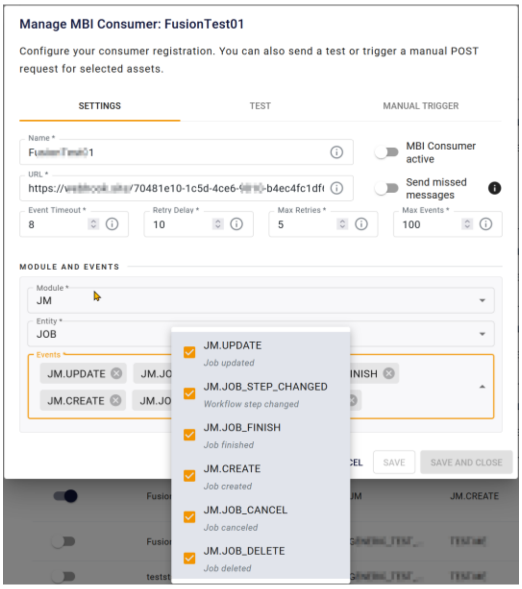
11.1 MBI

The first step in implementation is the *Job Manager* module in this release. The Job Manager sends information about completed transactions to the MBI service. The MBI service checks whether the module and the particular transaction are registered and sends the information as well as additional details about the source system and the module to registered third-party applications.



You can register an MBI consumer to synchronize data from your system with other third-party applications.

You can access the configuration page under > *Administration* > *Fusion* > *Backbone / MBI*.



It allows modules, entities and events to be configured for the MBI consumer.

11.2 Templafy Integration Service (TIS)

Version 7.3 introduces the Templafy Integration Service (TIS) interface. This interface allows assets to be copied from BrandMaker using Templafy. Assets that are to be available for use in Templafy are assigned to an appropriately set up VDB.

This allows for centralized control of usage. Subsequently, assets to which this applies can be used in the Templafy Office Add-in.

12 BrandMaker App

12.1 Extension with review functionality

In version 1.7, the BrandMaker App has been expanded to include essential functions for reviews. The app now shows the reviews for which the user is registered as a participant or owner. Although not identical, reviews can be managed with a very large range of functions as in the desktop version. Specifically, this means:

- Display of reviews in which the user is registered as participant or owner.
- Open, edit and decide on the release of all reviews; this also includes the editing of multi-page documents or the participants of a review.
- Mark and annotate the document under review, each mark and annotation is immediately visible to all participants.
- Comment and then link the comment in the overview to multiple pages
- Zoom like in the desktop version
- Select multiple, non-contiguous pages from a multi-page document for display in full-screen mode and then edit them

Note that other features such as comparing multiple versions are not available.

12.2 Intro pages

When the app is started, multiple intro pages can be set up by the administrator from version 1.7 and displayed for all users of a system. Further details can be found in chapter 2.3.

13 Marketing Shop

13.1 Other functional extensions and changes

Feature	Description
Extension of the REST API	The REST interface is extended in version 7.3 to include functions for article management. Please note that the corresponding documentation on our Developer Portal will only be available from 7.4 onwards, as the Marketing Shop REST API is still being developed and updated.

13.2 Discontinuations

Starting from version 7.3, the connection of Content Enrichment has been removed from the *Marketing Shop* module. Note that this discontinuation is also retroactive to version 6.6.

14 Smart Access

Note that the *Smart Access* module will be discontinued in an upcoming version. Therefore, check a migration to the *Dashboard* module in a timely manner.

15 Marketing Portal

In Version 7.3, the Marketing Portal uses the Magnolia Version 6.2.17. The release notes of Magnolia Version 6.2.17 can be found here.

16 Rights

16.1 Administration

The following right has been removed in version 7.3:

Name	Description
MANAGE_TEXT_ADAPTATIONS	The right is no longer needed because the corresponding page > *Administration > System Configuration > Text Modifications* was already removed in 7.1.

An existing right has been renamed in version 7.3:

Previous designation	New designation
MANAGE_MOBILE_SKIN	MANAGE_MOBILE_APP

The following rights have been added:

Name	Description
MANAGE_COMPANY_CALENDAR	Users can access the page > Administration > Users & Groups > *Company Holidays and Vacations* and manage calendars on it.
SELECT_COMPANY_CALENDAR	Users can access the selection list of calendars set up for the company and various user groups in their own user settings on the Absences page and display them in their own calendar.

16.2 Marketing Planner

The following rights have been added to the Marketing Planner module in version 7.3:

Right	Description
MAPS_MANAGE_LOCK_BUDGETS	Users can enable the locking of budgets on the > *Marketing Planner > Settings > Budget* page. Users can also edit the locking of past periods.
MAPS_MANAGE_BUDGET_DEFAULT_VIEW	Users can set a default budget view for all Marketing Planner users on the > *Marketing Planner > Settings > Budget* page.

16.3 Job Manager

Name	Description
MIGRATE_TYPES	The user reaches the *Migrate types* tab on the > *Administration* > *DSE* > *Maintenance* page and can migrate all types. **Note** In addition, the user needs the authorization to access the page > *Administration* > *DSE* > *Maintenance*, i.e. a corresponding role in the administration.

16.4 Review Manager

The following right has been removed in version 7.3:

Name	Description
DELETE_ALL_BULLETS	The user can delete a bullet point, including all of its comments.

The following rights are new in version 7.3.

Name	Description
ACCESS_GENERAL	Users with this right have access to the *General* tab. The tab will not be displayed for users without this right.
ADD_ANNOTATION	Users with this right are allowed to add annotations to reviews.
MANAGE_PARTICIPANTS	Users have the right to manage the participants of a review. The right allows: • New participants to be invited • Participants to be removed from the review • The role of participants to be modified
SEE_GLOBAL_COMMENTS	The user is allowed to see and use global comments listed in the right sidebar, see chapter 9.3.

17 Database changes

Please read this chapter carefully and thoroughly if you use Reporting Center to generate reports. In this chapter we describe database changes that may enable the generation of new reports or prevent the correct generation of existing reports when updating to a new version.

17.1 Administration

Table/database	Change	Explanation
mobile_intro_screen *audit_log_skinning* *audit_log_archive_skinning*	Tables added	These tables store the settings for the start pages of the mobile app, see 2.3
localizations_default	Table added	This table stores the default texts of the standard languages.
working_calendar renamed to *working_calendar_range*	Table renamed	These changes refer to the Company Holidays and Public Holidays feature, see 2.1.
calendar_to_user_group *calendar_to_use* *user_to_company_calendar* *user_to_company_calendar_excluded*	Tables added	
Keycloak database	Database added	These changes relate to the introduction of Keycloak, see 2.2
access_customer_system *access_application* *access_refresh_token* *access_access_token* *access_authorization_code* *access_system_keys*	Tables added	
Division	Columns *LEADER_USER_ID* and *IS_EXTERNAL* deleted	These columns are no longer needed.

17.2 Brand Template Builder

17.2.1 Multilingual input

The changes in this section refer to the changes for multilingual input, see chapter 5.3

Table	Change
templ_dropdown	Default value restriction for template selection list *Label* removed; size of columns *DEFAULT_VARIANT_NAME* ad *LABEL* extended
wp_standard_format wp_standard_format_group	Semantic corrections of values, e.g. incorrect language tags or empty strings.

In the following cases, the specified columns have migrated to ML json format with CLDR language tags:

Table	Columns
adv_templ_ml	TEMPLATE_COLUMN_GOALS, TEMPLATE_COLUMN_DEFAULT_CONFIGURATION_LABEL
cust_prop	NAME, DESCRIPTION
cust_prop_val	NAME
editor_preset	PRESET_NAME
renderers	LABEL, DESCRIPTION
publish_inst_data	MEDIA_TITLE, KEYWORD, DESCRIPTION, APROVE_DESCRIPTION, ARTICLE_DESCRIPTION
publish_inst_data_ff_vals	FREEFIELD_CODE, FREEFIELD_VALUE
templ_box	TEMPLATE_BOX_NAME
templ_dropdown	LABEL, DEFAULT_VARIANT_NAME
templ_dropdown_variant	LABEL
templ_layout_var	LABEL_NAME
templ_sect	NAME
templ_var	VARIABLE_NAME
validators	LABEL, VALIDATOR_MESSAGE
wp_online_variable_group	DISPLAY_NAME

Table	Columns
wp_online_container	DISPLAY_NAME
wp_online_container_source	DISPLAY_NAME
wp_online_template	DISPLAY_NAME, DESCRIPTION
wp_online_template_source	DISPLAY_NAME
wp_online_variable	DISPLAY_NAME
wp_online_variable_group	DISPLAY_NAME
wp_online_variable_default_value	HINT_TEXT

17.2.2 Other database changes

Table	Change	Explanation
table wp_channel	New channel *Other* added	These changes became necessary due to the introduction of the new channel designation *Other*, see chapter 5.3.
wp_online_template wp_online_document	Columns VALIDITY_FROM and VALIDITY_TO added to both tables	This change allows a validity period to be specified for online templates and documents, see chapter 5.1.

17.3 Job Manager

Table	Change	Explanation
rsm_task_effort_proportion	Table added	This change enables the individual allocation of tasks in resource management, see chapter 7.1.
rsm_resource	Table added	This change relates to the feature that multiple teams or user groups can now be displayed in resource management, see chapter 7.1. The new table is pre-filled with the resource IDs of the rsm_resource_to_view table. The RESOURCE_ID column in rsm_resource_to_view is now filled with edited IDs from rsm_resource.
dse_discussion dse_discussion_participant	Tables added	These changes allow for a clear distinction between both job discussion and job

Table	Change	Explanation
dse_comment	Columns *locale_id*, *TITLE*, *DSE_OBJECT_ID*, *DSE_COMMENT_PARENT_ID* removed Column *DSE_DISCUSSION_ID* added	comments, as well as job/process participants and discussion.
dse_job_participant	Column *PM_HISTORY_ID* removed	

17.4 Marketing Planner

Table	Change	Explanation
ma_files	table added; columns: *name*, *media_type*, *size*, *type* (marker, attachment, element, etc.), *creation_date*, *file_id*	When copying items, their attachments are no longer duplicated on the drive; instead, the newly copied attachments are linked to the same record in the *ma_files* table. The file size and file name are stored in the new table.

17.5 Marketing Shop

Table	Change	Explanation
sh_filters	Column *filter_name* migrated	These type migrations enable comfortable multilingual input.
sh_filters_criterias	Columns *fc_name* and *fc_description* migrated	
sh_catalogues	Columns *catalogue_label* and *catalogue_description* migrated	
sh_prod_categories	Columns *pc_label* and *pc_description* migrated	
sh_catalogue_group	Column *catalogue_group_name* migrated	
sh_companies	Column *company_name* migrated	
sh_order_lists	Column *ol_name* migrated	
sh_cf	Columns *cf_label* and *cf_text_static* migrated	
sh_supplier_cf	Column *scf_name* migrated	
sh_supplier_cf_instances	Columns *scfi_name* and *scfi_value* migrated	
sh_currencies	Column *currency_name* migrated	
sh_headers	Columns *header_name* and *header_description* migrated	
sh_teasers	Columns *teaser_label* and *teaser_description* migrated	
sh_prod	Columns *product_label* and *product_description* migrated	
sh_countries	Column *country_name* migrated	
sh_companies	Column *company_country* migrated	
sh_item_editor_config	Column *config_name* migrated	
sh_item_editor_tab	Column *tab_name* migrated	