BrandMaker GmbH

Administration
Administration Manual

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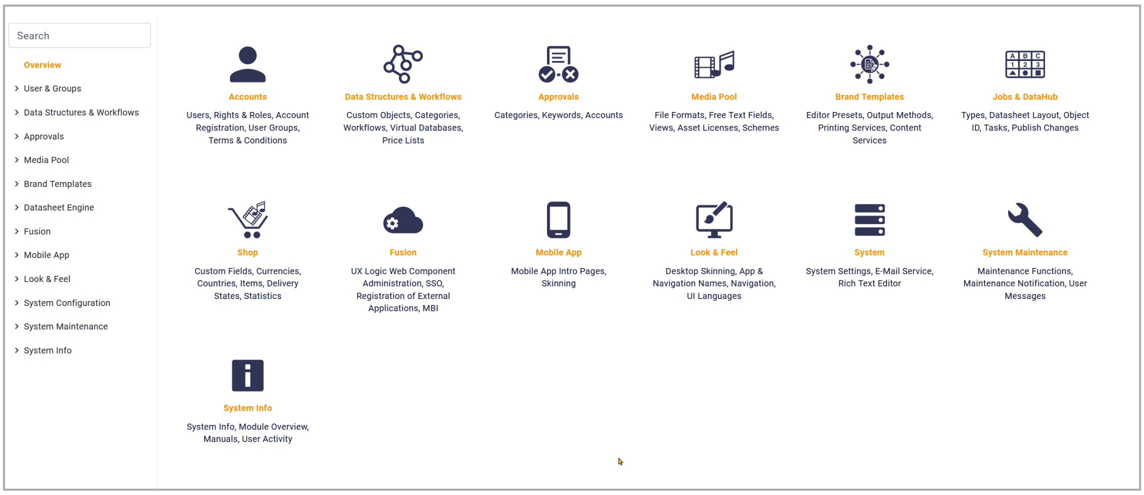
1

Useful information for getting started

Here you can find some tips and information that will help you to efficiently carry out tasks related to the administration.

Navigation in the administration

You can access the administration home screen by choosing > *Administration*:



You can navigate through the administration menu items on the left-hand side. If you want to activate one of the top menu items directly, click the relevant tile on the right.

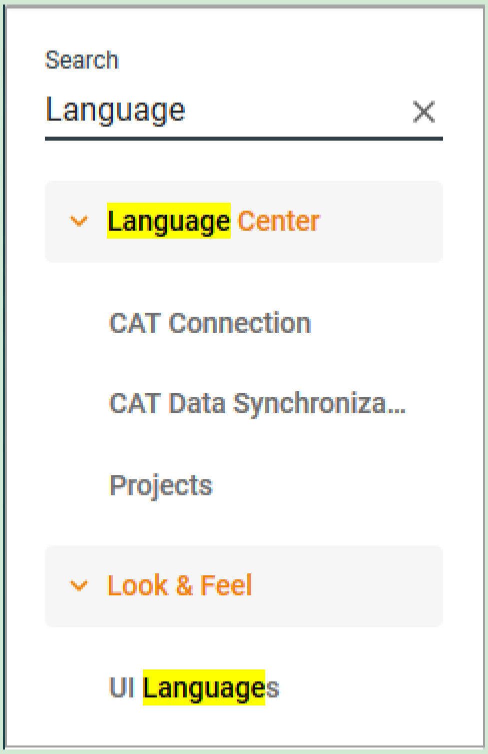
If you are searching for a theme but do not know the menu item in which you can find it, enter a suitable search term in the search line above the navigation menu.

EXAMPLE

You want to choose the interface languages in which the system can be used:

1. Type in the *Language* search field.

   A corresponding link is displayed below the search field:

2. Click the required result.

The page that you are searching for opens.

Important interrelationships

To create a new user account, you require:

- An *organizational unit* that you can assign to the user
- A *VDB group* that you can assign to the user
- A *role* for each Marketing Efficiency Cloud module that you want the user to use

To display required tasks and user profiles, you require:

- *Roles* that group together the necessary rights and that can be assigned to users

To create a VDB group, you require:

- Multiple *virtual databases (VDBs)* so that you can group them together in a VDB group

To assign users to a user group, you require:

- *Organizational units*

To assign rights, you require:

- *Roles* for the Marketing Efficiency Cloud modules used, so that various rights can be grouped together

To provide the checked assets in the Media Pool, you require:

- A VDB group for which *approval is required*
- A *workflow* to map the individual check steps
- *User groups* so that the individual workflow steps can be assigned
- *Roles* that have been assigned with the appropriate rights for carrying out the functions required for approvals

To restrict access to assets, you can:

- Regulate access using *VDBs*
- Assign assets and users to an *affiliate*
- Define *roles* and assign the relevant rights to them
- Assign *categories* and restrict the visibility of a category to *organizational units*

Privacy

2

The General Data Protection Regulation (GDPR) is a European Union regulation that harmonizes the rules governing the processing of personal data by private companies and public authorities throughout the EU. To ensure that you also comply with the GDPR in your company with the BrandMaker Marketing Efficiency Cloud, please refer to the following sections.

Personal data

The Marketing Efficiency Cloud stores the following personal data of users:

- Full name
- Gender (by salutation)
- Company
- Affiliate
- Function
- Type
- User name
- E-mail address
- Telephone numbers
- Address data
- User remarks
- Label
- Roles in the modules
- Organizational unit
- Catalog group
- VDB group
- IP address
- Objects with explicit content reference to the person, e.g. assets with image of a user, assets with user signatures

Visibility of personal data

Part of the normal workflow in the Marketing Efficiency Cloud is that a user collaborates or contacts other users in the system, e.g. when applying for a market development fund or when sending an asset by e-mail. At these places, only other users' first and last names are displayed.

Based on the role of a user in the system, it may be necessary for the user to have extended access to personal data (need-to-know principle). This is the case, for example, for user administration. This extended access is regulated in the Marketing Efficiency Cloud through existing rights.
Therefore, when creating roles, pay close attention to the assignment of rights and the associated visibility of personal data. Assign roles that allow extended access to personal data to only a few and appropriately trained users!

In addition, it may be necessary to grant certain users extended access independent of the need-to-know principle. In this case, you assign the right SEE_ALL_PERSONAL_DATA to the role of the respective user. This is a right of the *Administration* module. As in previous versions of the Marketing Efficiency Cloud, users whose role is assigned this right see not only the first and last names of other users, but also, for example, e-mail addresses or organizational units.

Note

Please note: When updating an existing system to version 6.1, the right is initially added automatically to all roles. This first establishes the previous system behavior. Check which roles actually need this right and delete it from the respective rights lists if necessary.

Erasability of personal data

When you delete a user as an administrator, all personal data is deleted from the Marketing Efficiency Cloud database.

However, it is possible that personal data may still be present in other places, e.g. in objects with explicit content reference to the person, e.g. assets with a user's picture. BrandMaker describes in a separate document how to solve these cases in order to give you a real *right to be forgotten*. For more information, contact your contact person.

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

3

User admin-istration

In the > *Administration* > *Users & Groups* > *Users* area, you can create new users or edit existing users.

Prerequisites

You have the right MANAGE_USER.

> Note
>
> You can restrict user administration by assigning the right MANAGE_USER_OWN_ORG to a role. Users who have this right can call the > Users & Groups > Users menu item and search for and edit existing users in their own organizational unit. It is not possible to create new users.

3.1 User specifications

You enter the information required to maintain the user in a table overview:

Name	Description
Login	This specifies the name with which the user must log into the Marketing Efficiency Cloud.
Password/Repeat password*	This specifies the password with which the user must log into the Marketing Efficiency Cloud. Under > *User name* > *User Settings*, users can reset their password and set a new one. Note: The maximum password length is 128 characters.
First name/Last name	You enter the first name and last name of the user. Note: Under > *User name* > *User Settings*, you can change your first and last names.
E-mail	You enter the e-mail address of the user. Note: Under > *User name* > *User Settings*, you can enter an alternative e-mail address.
Title	You enter the title for the user. Note: Under > *User name* > *User Settings*, you can change your title.
Organizational unit	You define the organizational unit to which the user belongs.
Do not overwrite with SSO	Activate the checkbox to prevent overwriting the assignment to an organizational unit if the Single-Sign-on method is used to log in.
External user	Enable the checkbox to select an external user. An account for an external user must be approved by an internal contact person. Note that the account of an external user cannot be locked automatically.
Locked user	Enable the checkbox to lock a user. Note: The checkbox is activated automatically if an incorrect password is entered too many times when logging in.
Public user	Enable the checkbox when you want to create a login for persons who otherwise do not have access to the system. Please see *Public Users* on page 27.

Name	Description
Active user	Activate the checkbox to allow the user to log into the Marketing Efficiency Cloud.
SEW / MPM User	Select the checkbox to allow the user to access Sales Enablement/Media Pool Mobile.
Date of validity	Specify the date up to which the user can log in to the Marketing Efficiency Cloud.
Last login on <Date> from <IP address>	This displays the last date on which the user logged into the Marketing Efficiency Cloud. It also displays the IP address and the type of login (manual or via SSO).
Automatic account expiry on <Date>	The displayed date is calculated automatically, based on the user's last login. Prerequisite: • The value of the system setting *brandmaker.login.days-to-inactivity* is greater than 0.
Automatic account expiry deactivated	This information is displayed • if you have set a period of validity for a user or • the value of the system setting *brandmaker.login.days-to-inactivity* is set to 0.
Remarks	Enter additional information about the user.
Catalog group	You assign a catalog group to the user and specify which items and catalogs the user can access in the Marketing Shop module. This field is a required field when a role is assigned to the user in the *Marketing Shop* module.
VDB group	You assign a VDB group to the user and specify which assets the user can access or which assets are visible to the user.
Company	You enter the name of the company.
Supplier	You assign a supplier that has been created in the Marketing Shop to the user. The selected supplier is used by default for orders or print jobs.
Function	Enter a description of their tasks. Note: Under > *User name* > *User Settings*, you can change the function.

Name	Description
Selected affiliate ID	You enter the affiliate ID that is assigned to the user. The information linked to the affiliate ID is automatically used in other modules.
Affiliate IDs (comma separated)	You can enter a list of affiliate IDs separated by commas. Under > *User name > User Settings*, the user can select an affiliate.
Type	You can select the user type (an agency, for example). Note: The entries in the dropdown list are defined in the custom structure USER_TYPE. Note: Users that have the right EDIT_MY_DATA can change the entry in the user settings.
Title	You can enter a title (for example, the academic degree) of a user. Note: Users that have the right EDIT_MY_DATA can change the entry under > *User name > User Settings*.
Label	In this field, you enter additional information about the user such as his or her partner status or sales region. This field can be used to filter custom structures by user in *Brand Template Builder* module (see the Brand Template Builder Administration Manual). The field can be filled manually or using SSO.

Note

The *Cost center* attribute for a user can also be maintained via API. In the *Marketing Shop* module, this attribute can simplify orders billed through a cost center. See the applicable API documentation.

Role assignment area

Using the dropdown list, you can assign a role for each module to a user. Enable the *Login as user* checkbox to allow other users to log in as this user without entering the password. For other users to log in as this user, they require the right LOGIN_AS_USER.

3.2 Administration via the GUI

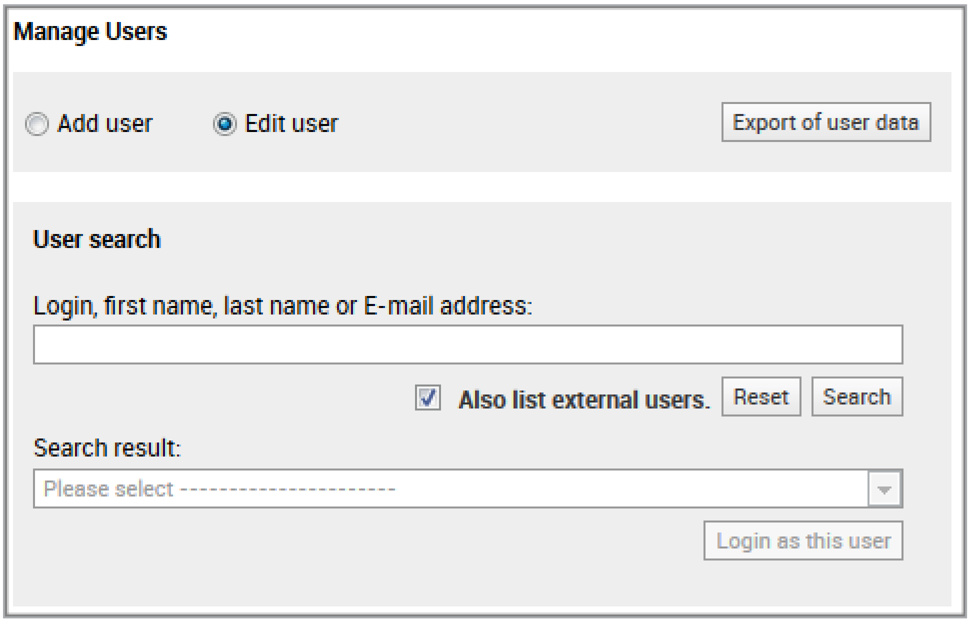
In addition to the option of creating and managing users via the interface, you can also export, edit, and upload the user list via the import function.

To edit an existing user, you must first search for and select a user from the search screen. You can use one of the following functions:

- *Also list external users*: Activate this checkbox so that you can also select users that have been flagged as external from the dropdown list.
- *Export of user data*: This creates an XLSX file of all the existing users.
- *Login as this user*: If the checkbox *Login as this user* is activated for the selected user, you can use and log into the user account of this user.

  Note: After you click Login as this user, log out of the Marketing Efficiency Cloud and log in again using the user data of the selected user.
- *Delete*: This deletes the selected user.

  Attention: You cannot undo the deletion of a user.
- *Reset*: This deletes any settings and information stored for the user.
- *Update*: This saves the changes you have made to the user. The input screen remains open.



3.3 Administration via the Import/Export interface

You have the option of creating and downloading an XLSX file of all existing users via the Export of User Data. You can edit this file locally on your computer, add users, and import via the Import of User Data.

Note the following points:

- The reference for trimming updates or newly added users is the *GUID* attribute (column B).
- Mandatory fields must also be maintained in the XLSX file, analogous to the interface, so that the user list import can function without errors.
- You can either import the data of all users, or upload only one XLSX file with individual users (i.e. individual lines).
- The XLSX file must always contain all columns. A file will missing columns will lead to a corrupted import. Columns can be added to the right of the final column *Delete user and substitute by*, but will be ignored accordingly in an import.
- It is recommended that you import only modified or newly added rows in the XLSX file into the system, to reduce the time the system takes to import them.

Creating or deleting new users

- You create a new user by filling out the line including all mandatory fields. Column B *GUID* remains empty. Users who are not assigned a GUID in the XLSX file are newly created in the system.
- If a valid login is entered in the column BY *Delete user and substitute by*, the user will be deleted and assets, templates, documents, and other objects will be transferred to the user entered in the BY column.

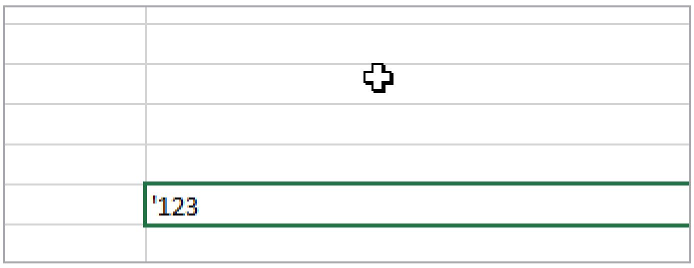
Creating users via the user list import without unlocking them afterwards:

- The setting *brandmaker.login.login-request.approval-required.internal "Account requests internal confirmation"* can be deactivated in order not to have to release each user individually for a mass import of new users. The new users only have to confirm their e-mail address, and will then receive an access link to the system by e-mail.

Fields to fill out in the Excel file for a correct import

The following fields must be filled in for a correct import:

- Mandatory fields (marked with an asterisk): *Login* (column C), *E-mail* (column D), *Organizational unit* (column AT), *VDB Group* (column AU), *Catalog Group* (AV)
  - Note that the *Login* (column C) and *E-mail* (column D) fields must have unique values and cannot already exist in the system with the entered values.
  - Correct values created in the system must be entered in the fields *Organizational unit* (column AT), *VDB Group* (column AU), and *Catalog Group* (AV). You can find the correct values in the Excel file in the *Possible Values* worksheet. Pay particular attention to upper and lower case letters and special characters.
- *First Name* (G), *Last Name* (H), *Language* (AP), *Country/region* (AQ), *Time Zone*(AR), *Preferred Unit of Length* (AS)
  - Correct values created in the system must be entered in the fields *Language* (AP), *Country/Region* (AQ), *Time Zone* (AR), and *Preferred Unit of Length* (AS). For example, the entered language abbreviations (column AP, *Language*) must be valid, e.g. de-DE for German or en-US for English (US). You can find the correct values in the Excel file in the *Possible Values* worksheet. Pay particular attention to upper and lower case letters and special characters.
- *Do not overwrite with SSO* (BB), *External User* (BC), *Locked User* (BD), *Active User* (BE): These are Boolean fields, so enter 1 for true and 0 for false. Note that numbers must generally be masked by a leading apostrophe:

  Correspondingly, enter '0' or '1' for Boolean values.
- Roles assigned in the XLSX file must exist in the system. You can find the correct values in the Excel file in the *Possible Values* worksheet. Pay particular attention to upper and lower case letters and special characters.

3.4 Public Users

In some cases, it may be helpful to grant limited access to content and functions to people who are not registered as users in the system. Examples are access to assets in Media Pool and information in the Brand Management Portal.

To make content accessible to non-registered people, set up one or more public users as needed. The following requirements apply for a public user:

- A public user never has rights for the *Administration* module.
- A public user cannot switch between modules.
- You can assign any role to a public user within a module. Persons who are signed in as public users can reach all functions according to this role.

> Attention
>
> People reach the system as public users via a link. If the link data is known, any person can use the system as a public user. However, actions cannot be traced back to the executing person via the public user.
> Therefore, check exactly which functions and which access to data you can unlock with a public user.
> Inform the users who send the link data via this behavior.
> If necessary, ask the people who receive the link data not to redistribute it.

Setting up access to the system for non-registered persons

1. Switch the function on in the *Administration: Public Users* system setting.
2. Create a public user. While creating it, activate the *Public user* checkbox. For the required modules, only assign roles to the public user that unlock exclusively the required functions. Also check access to data via VDBs and catalogs.
3. Create the link:

    1. Copy the link to which you want to grant access to non-registered persons, e.g. the welcome page of the Media Pool module: *https://yoursystem.com/MediaPoolHomeAction.do*
    2. Insert the following section between *https://yoursystem.com* and */MediaPoolHomeAction.do*: */AutoLogin.do?login=PublicUser&redirectUrl=*. Replace *PublicUser* with the login for the public user.

EXAMPLE

You have created a public user with the login *john.doe*. The link on the Media Pool welcome page now reads: *https://y-oursystem.com/AutoLogin.do?login=john.doe&redirectUrl=/MediaPoolHomeAction.do*

4. Distribute this link to the people who should have access as public users.

When people execute the link, they are logged in to the system as public users, gain access to the linked page, and can use the functions according to their role in the module.

3.5 Locking user accounts

To lock a user account, you have a number of options:

- You can delete a user.
- You can activate the *Locked user* checkbox.
- You can deactivate the *Active users* checkbox.
- You can define a date of validity. Once the validity expires, the *Active users* checkbox is deactivated automatically.
- You can define the number of days that a user can be inactive before the user is locked.

3.5.1 Example: Locking user accounts automatically

You want to specify that the accounts of every user who does not log into the Marketing Efficiency Cloud for 30days is locked automatically. Sevendays before the deadline expires, you want to send an e-mail to the respective users, notifying them that their account will be locked.

Attention

You use the system settings to control how the Marketing Efficiency Cloud works. Incorrect settings may lead to undesirable results. Please ask your contact person if you have any questions.

Prerequisites

You have the right APPLICATION_CONFIGURATION_BASIC.

Locking user accounts automatically

1. Choose > *Administration* > *System Configuration* > *System Settings*.

   This opens the System Settings page, which lists the system settings and their saved values.

2. For the system setting *Account deactivation*, set the value *30*.
3. For the system setting *Account deactivation respite*, set the value *7*.

You have edited the system settings. The overview for the selected user (> *Users & Groups* > *Users*) displays the entry *Automatic account expiry on <Date>*.

Note

A login using the single sign-on procedure counts as a regular login and resets the counter for the inactive days. As soon as a value greater than 0 is set for the system settings *Account deactivation* and *Account deactivation period*, all user accounts are checked. The dates on which the accounts are locked automatically or e-mail messages are sent are calculated based on the last saved login date. A date of validity that has been set manually for a user account overrides any value saved in the system setting *Account deactivation*. A user account that would otherwise be blocked due to inactivity remains active if a manual date of validity extends the validity period.

3.6 User groups

Multiple users are grouped together in user groups. You can use user groups to:

- map responsibilities by assigning a workflow step to a user group,
- restrict the visibility of job or data object types to selected user groups.

Click > *Administration* > *Users & Groups* > *Manage User Groups* to display an overview of the existing user groups.

Prerequisites:

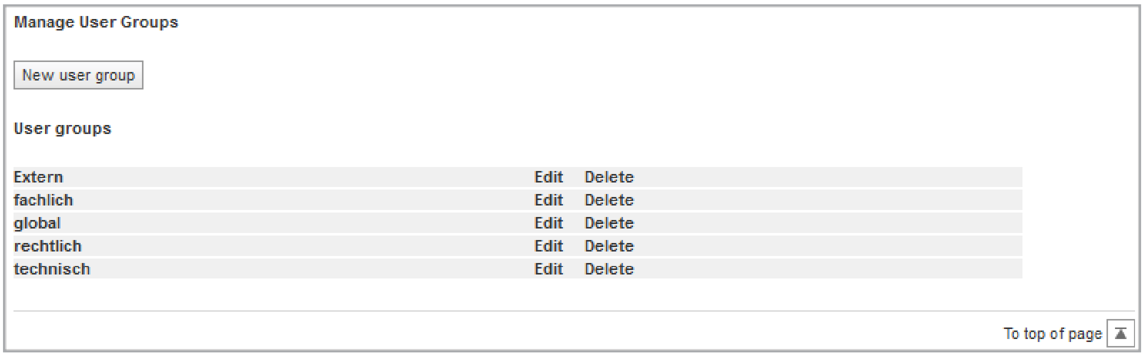
You have the right CREATE_USER_GROUPS.

Functions

You can call the following functions on the overview page:

Name	Description
Add user group	This creates a new user group.
Editing	This changes the name of the selected user group.
Delete	This deletes the selected user group.

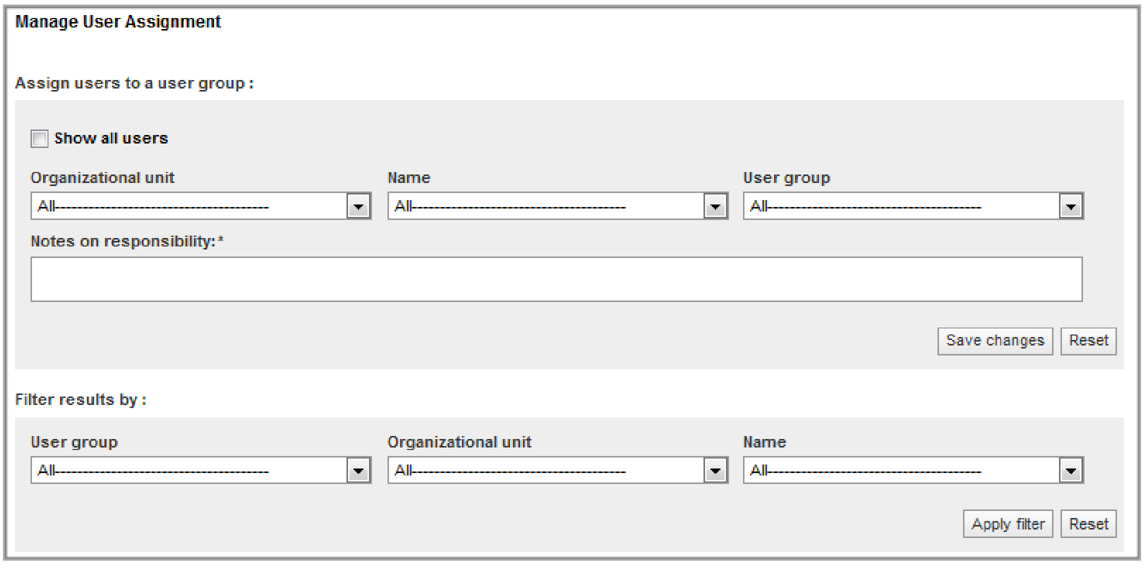
> **Note**
>
> A user group that is assigned to a workflow cannot be deleted. If a user group is assigned to a workflow, you must assign the affected workflow step to a different user in the dialog box that opens before making the deletion.



3.6.1 Assigning user groups

Choose > *Administration* > *Users & Groups* > *Manage User Assignment*. You can:

- Assign users to a user group.
- Remove users from a user group.
- List all the users assigned to a user group.



3.6.2 Example: Assigning a user to a user group

The team leader of the organizational unit *BrandMaker* is called *Dennis Demo*. You want to assign *Dennis Demo* to the user group *Specialist* and enter *Team leader* as his responsibility. You also want to assign the user *Manfred Mustermann* to the user group *External photographer*. You want to define the entry *Portrait* as his responsibility.

Prerequisites

- You have the right ASSIGN_USER_GROUPS.
- The users and user groups have been created.

Assigning users to a user group

1. *Optional*: Restrict the list of selectable names by selecting the organizational unit to which Dennis Demo is assigned in the *Organizational unit* field.
2. In the *Assign user to user group* area, select the entry *Dennis Demo* from the *Name* selection list.
3. From the *User group* dropdown list, select the entry *Specialist*.
4. Optional: Enter *Team leader* in the input field *Notes on responsibility*.
5. Choose *Save changes*.

You have assigned the user *Dennis Demo* to the user group *Specialist*.

6. Choose *Reset*.

   This resets the dropdown lists.

7. Select the entry *Manfred Mustermann* from the *Name* dropdown list.
8. From the *User group* dropdown list, select the entry *External photographer*.
9. Optional: Enter *Portrait* in the input field *Notes on responsibility*.
10. Choose *Save changes*.

    You have assigned the user *Manfred Mustermann* to the user group *External photographer*.

You have assigned both users to the relevant user groups.

3.6.3 Example: Removing a user from a user group

You want to remove the user *Manfred Mustermann* from the user group *External photographer*.

Prerequisites

You have the right ASSIGN_USER_GROUPS.

Removing users from a user group

1. *Optional*: Restrict the list of selectable names by selecting the entry *External photographer* in the *User group* field.
2. In the area *Filter results by*, select the entry *Manfred Mustermann* from the *Name* dropdown list.

   The user is displayed.

3. In the line *Manfred Mustermann*, click the *Recycle bin* icon.
4. In the dialog box that opens, choose *Yes* to confirm.

The user *Manfred Mustermann* has been removed from the user group *External photographer*.

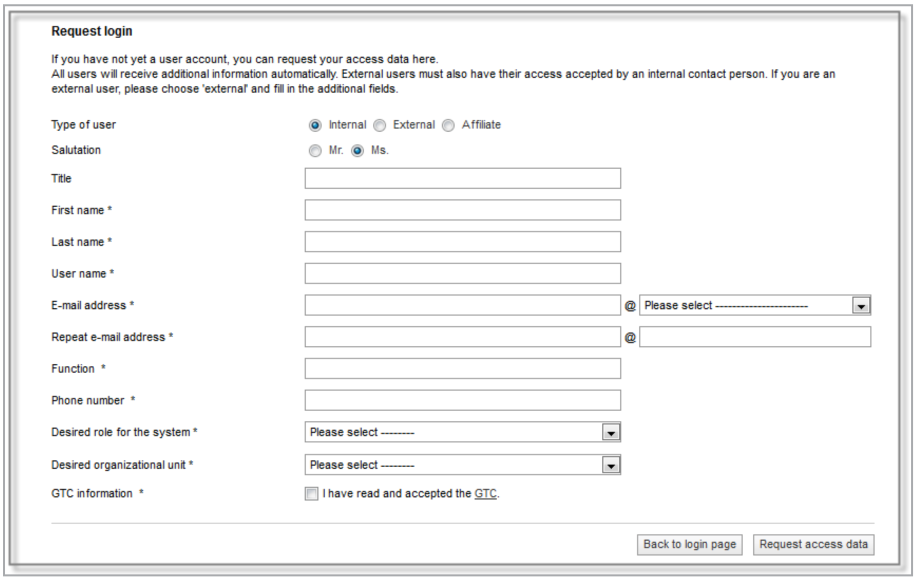
3.7 User account registrations

You can use the link *Request an account* on the Marketing Efficiency Cloud login page to call an input form that you can use to request a new account. In the Configuration area, you can specify which contact information is displayed and required.

> **Note**
>
> Form fields such as *Contact person*, *Desired role in system*, or *Desired organizational unit* are displayed by default - depending on the user type. You configure the relevant settings in the system settings under > *Administration* > *System Configuration* > *System Settings*. Among others, it also specifies which user types (internal, external, affiliate) can be selected. If you have any additional questions, contact your BrandMaker contact person.

Choose:

- > *Administration* > *Users & Groups* > *Account Registration* to edit the input form for user registrations. Note that configuring user requests is done using system settings, see chapter *Administration* on page 244.
- > *Administration* > *Approvals* > *User Accounts* to process account requests that have been received.

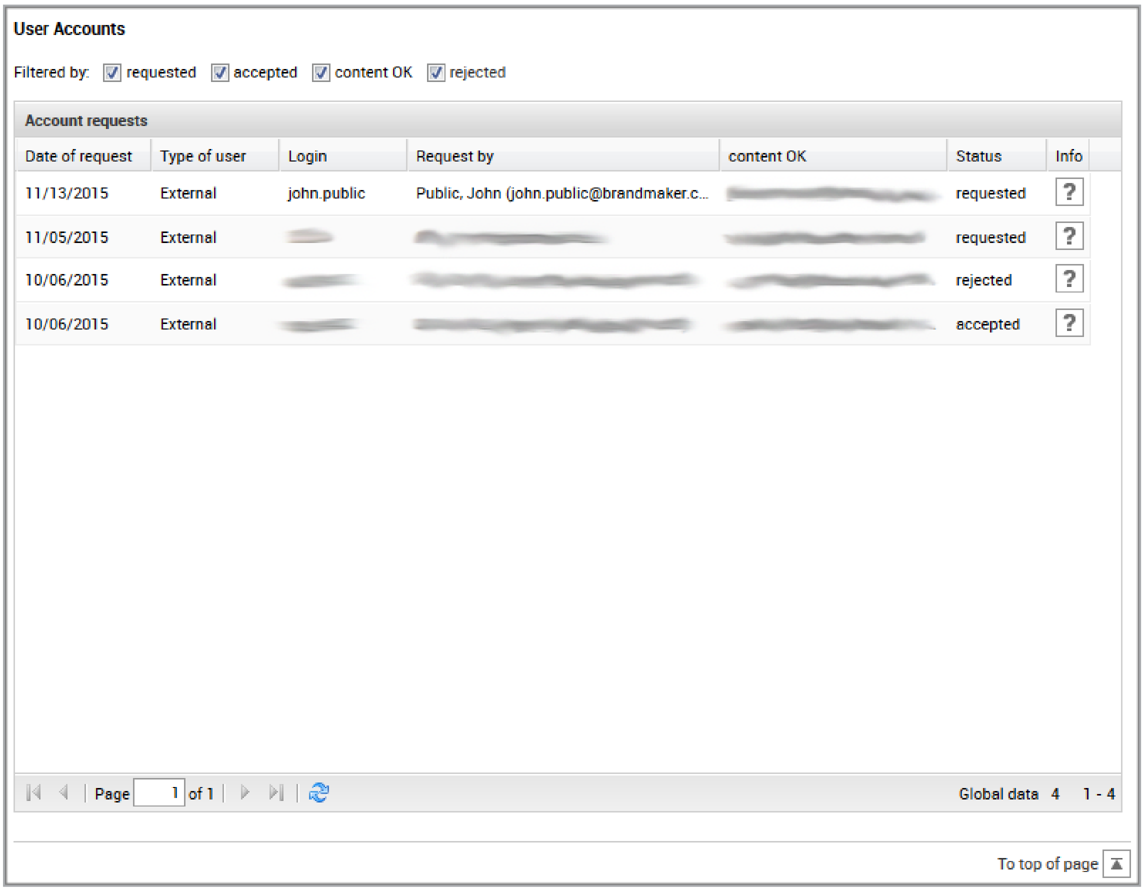


3.7.1 Viewing and editing user account requests

Account requests can be viewed and edited in the configuration area of the BrandMaker system. Click > *Administration* > *Approvals* > *User Accounts*. An overview list of the account requests is displayed.

Prerequisites

To use the function > *Administration* > *Approvals* > *User Accounts*, you require the right MANAGE_ACCOUNT_APPROVALS or MANAGE_ACCOUNT_APPROVALS_OWN_ORG.



You can filter the overview list of account requests by enabling various checkboxes:

Requested	This lists all of the requests placed that have not been accepted yet.
Accepted	This lists all requests that have been accepted.
Content OK	This lists all account requests flagged as content OK by an authorized user (internal contact person for an external requestor).
Rejected	This lists all rejected account requests.

Click a column heading to sort the column content alphabetically in ascending or descending order. In addition, define the columns that will be displayed in the overview list.

In the overview list of account requests, you can show various columns:

Date of request	Displays the date when the request was created.
Type of user	This displays whether the account was requested by an external, internal or affiliate user.
Login	Displays the selected username.
Request by	Displays the name of the user making the request.
Content OK	This displays the name and e-mail address of the user that the request has confirmed as content OK. The administrator carries out the final approval.
	This displays information about the account request, such as the user type, e-mail address or reason for the request, for example.

Right-clicking an account request opens a context menu where you can *accept*, *reject*, or *delete* the selected request.

Accept	The requestor receives an e-mail with the access data for the BrandMaker system.
Reject	This opens a dialog box in which you enter the reason for rejection. The reason for rejection is sent to the requestor via e-mail.
Delete	This deletes the user together with the account request. The request must be rejected beforehand.

3.8 SSO groups

In addition to creating them manually via > *Users & Groups* > *Users*, users can also be created via a SSO server (Single Sign-on). In this case, authentication takes place automatically via a trusted computer in the intranet of your company. For example, you can transfer names from an Active Directory directly to the Marketing Efficiency Cloud and let them be created as new users. The Active Directory groups correspond to the SSO groups.

> Note
>
> More detailed configurations are required to use single sign-on for logging into the Marketing Efficiency Cloud. If you have any questions, please contact your contact person.

Choose > *Administration* > *Users & Groups* > *Single Sign-On Groups* to assign users transferred via an SSO server to a role as required. You can create a new SSO group and/or edit and update an existing SSO group.

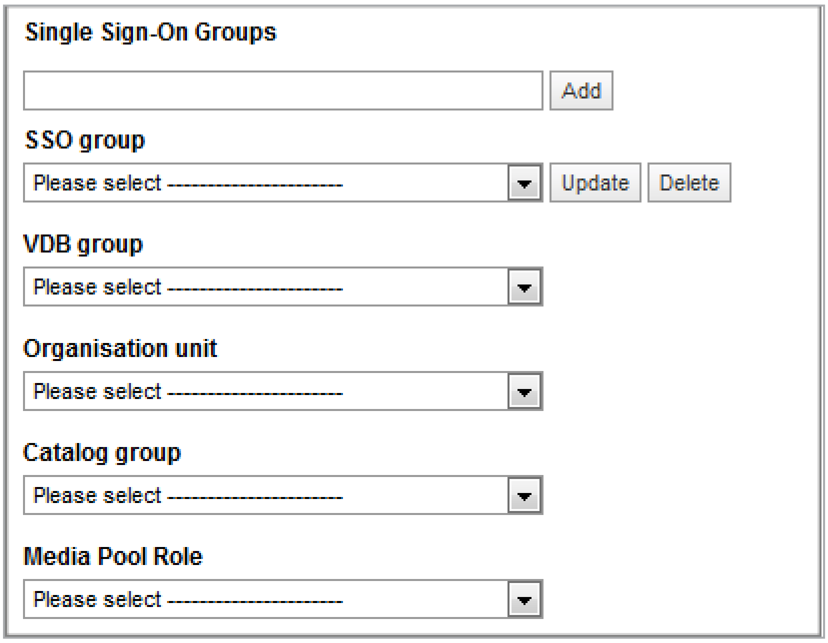
Prerequisites

- For the individual modules, roles are already created, which you can assign to an SSO group using the dropdown list.
- At least one VDB group has been created, which you can assign to the SSO group.
- At least one catalog group for the Marketing Shop has been created, which you can assign to the SSO group.

You can activate the checkbox *Use as default SSO group* to define that the users created via the interface are assigned to this SSO group. Use the *Adjust login as* function to define whether the *Login as user* function is activated for the users created with this SSO group (*permit*) or not (*prohibit*).

Note

You can only ever select one SSO group as the default SSO group. When you activate the checkbox, the default SSO group that was active up to now is deselected.



3.8.1 Creating an SSO group

Prerequisites

- For the individual modules, roles are already created, which you can assign to an SSO group using the dropdown list.
- At least one VDB group has been created, which you can assign to the SSO group.
- At least one catalog group for the Marketing Shop has been created, which you can assign to the SSO group.

Creating an SSO group

1. Choose > *Administration* > *Users & Groups* > *Single Sign-On Groups*.
2. Enter the name of the new SSO group in the input field.
3. Edit the fields below the *SSO group* selection list.
4. Click *Create*.

You have created the SSO group.

3.8.2 Copying an SSO group

Prerequisites

An SSO group has been created.

Copying an SSO group

1. Choose > *Administration* > *Users & Groups* > *Single Sign-On Groups*.
2. In the *SSO group* selection list, select the SSO group that you want to copy.

   The name of the SSO group is displayed in the input field above the selection list.
3. Change the name displayed in the input field above the selection list.
4. *Optional*: Change the settings for the fields below the selection list.
5. Click *Create*.

You have copied the SSO group.

3.8.3 Editing an SSO group

Prerequisites

An SSO group has been created.

Editing an SSO group

1. Choose > *Administration* > *Users & Groups* > *Single Sign-On Groups*.
2. In the *SSO group* selection list, select the SSO group that you want to edit.

   The name of the SSO group is displayed in the input field above the selection list.
3. *Optional*: Change the name displayed in the input field above the selection list.
4. *Optional*: Change the settings for the fields below the selection list.
5. Choose *Update*.

You have edited the SSO group.

3.8.4 Deleting an SSO group

Attention

You cannot reverse the deletion.

Prerequisites

An SSO group has been created.

Deleting an SSO group

1. Choose > *Administration* > *Users & Groups* > *Single Sign-On Groups*.
2. In the *SSO group* selection list, select the SSO group that you want to delete.
3. Choose *Delete*.

You have deleted the SSO group.

3.9 MPM Groups

Create user groups for Media Pool Mobile and Sales Enablement Workbench under *> Administration > Users & Groups > MPM Groups*. Each group receives one the roles *Administrator*, *Reader* or *Anonymous*. In the user administration, you can then assign the user an MPM group and thus a role.

Associated tasks

- Create MPM Group
- Edit MPM Group
- Delete MPM Group

3.9.1 Create MPM Group

1. Click *> Administration > Users & Groups > MPM Groups*.
2. Click *Add Group*.

   The *Create group* dialog box is displayed.
3. Enter a name.
4. Assign a role to the group of either *Administrator*, *Reader* or *Anonymous*.
5. Click *Save group*.

   The group is displayed in the list.
6. Click on the group in the list.
7. In the category tree on the right-hand side, activate the categories you want to assign to the group.

You have created the group.

3.9.2 Edit MPM Group

1. Click *> Administration > Users & Groups > MPM Groups*.
2. Place the cursor on the group you want to edit in the group list.

   The pencil icon is displayed.
3. Click on the pencil icon.

   The *Edit group* dialog box is displayed.

4. Optional: Edit the name.
5. Optional: Edit the assigned role.
6. Click *Save group*.

   The group is displayed in the list.
7. Click on the group in the list.
8. Optional: In the category tree on the right-hand side, edit the categories assigned to the group.

You have edited the group.

3.9.3 Delete MPM Group

1. Click *> Administration > Users & Groups > MPM Groups*.
2. Place the cursor on the group you want to edit in the group list.

   The recycle bin icon is displayed.
3. Click on the recycle bin icon.

   The *Remove group* dialog box is displayed.
4. Click *Confirm*.

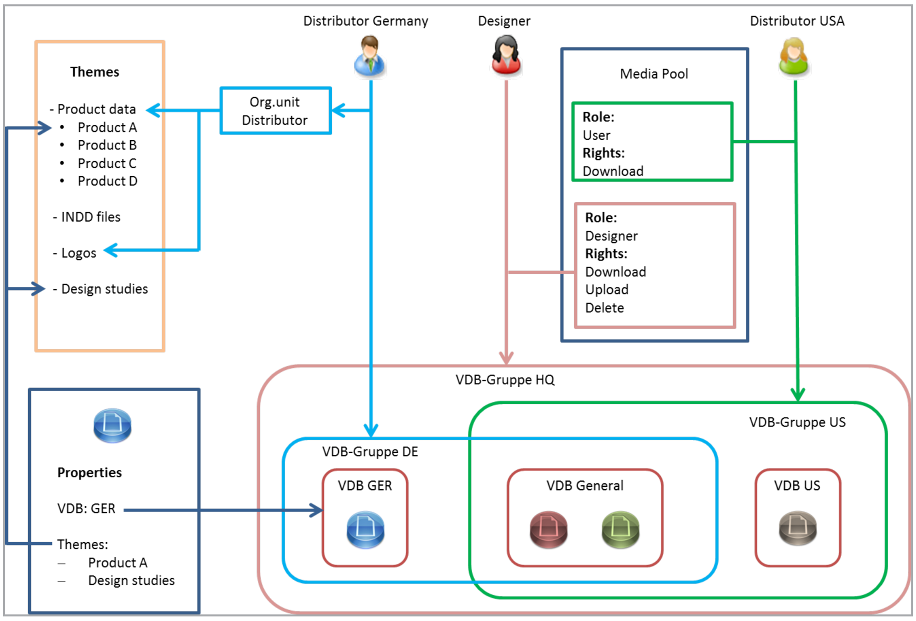
You have deleted the group.

4

Defining access and visibilities

The Marketing Efficiency Cloud provides a range of options for restricting access to assets or restricting the use of functions. The various options can be combined with each other. This allows you to map different requirement profiles and user profiles.

- *Rights* determine which functions and areas can be used.
- *Roles* describe task profiles and group together rights that are required to complete the tasks.
- Assets are stored in *virtual databases* (VDB). An asset is assigned to exactly one VDB.
- Several VDBs can be grouped together to form a *VDB group*. Each user is assigned to a VDB group and, as a result, obtains access to the VDBs that belong to the group and the assets stored in them.
- *Themes* can be used to structure and categorize assets. By assigning an organizational unit, you can regulate the visibility of themes and the assets assigned to the themes.
- *Organizational units* map the hierarchical structure of a company. *Users* are assigned to an organizational unit.
- Assets and users can be assigned to one or more *affiliates*. You can define that users can access only assets for their own affiliate.



> **Note**
>
> If you have any additional questions, contact your BrandMaker contact person.

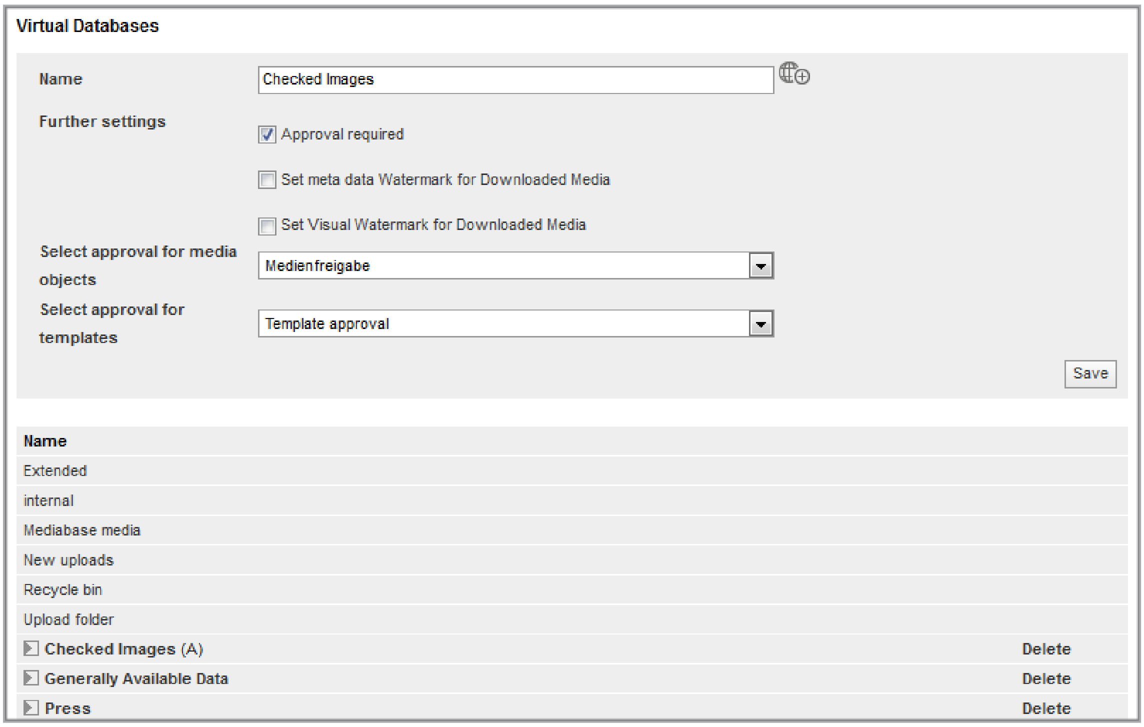
4.1 Virtual databases

Choose > *Administration* > *Data Structures & Workflows* > *Virtual Databases* to call an overview of your existing virtual databases (VDBs) or to create a new VDB.

Prerequisites

You have the right MANAGE_VIRTUAL_DATABASES.

> **Note**
>
> The VDBs *Extended*, *Internal*, *Mass import*, *Mediabase media*, *New uploads*, *Recycle bin*, and *BrandMaker Demo Contents* have been created by default and cannot be edited or deleted.



Click the name of a VDB to load the selected VDB to the upper editing screen. You can edit the name or create any language versions required for the name. You configure additional settings by activating the checkboxes:

- *Approval required*: Assets or templates in *Brand Template Builder* module imported to the VDB must first be approved by a user with appropriate authorization. VDBs for which approval is required are flagged with an "A" in the overview. From the dropdown lists *Select approval for assets* and *Select approval for templates*, define the workflow to be used.

- *Set meta data watermark for downloaded assets*: When an asset is downloaded or sent, various information is encoded and stored in the output format.
- *Set visual watermark for downloaded assets*: When the asset is downloaded or sent, a watermark is rendered in the output format (pixel images such as JPG or GIF). Visual watermarks cannot be used in vector graphics, PSD files, or video and audio files.

You can remove an existing VDB by clicking *Delete*. Note that a VDB can be deleted only if no assets are assigned to it.

Attention

You cannot reverse the deletion of a VDB.

4.1.1 Example: Creating a VDB that requires approval

You want to create a VDB in which assets are available only after a check or after a workflow is complete.

Prerequisites:

- You have the right MANAGE_VIRTUAL_DATABASES.
- You must have a workflow that you want to use for the approval of assets and/or templates.
- You require a user group, in which you group together the required users and to which you assign the workflow step.

Creating a VDB that requires approval

1. Choose > *Administration* > *Users & Groups* > *Virtual Databases*.
2. Enter the *name* of the VDB in this input field. Specify the required language version.
3. Activate the *Approval required* checkbox.

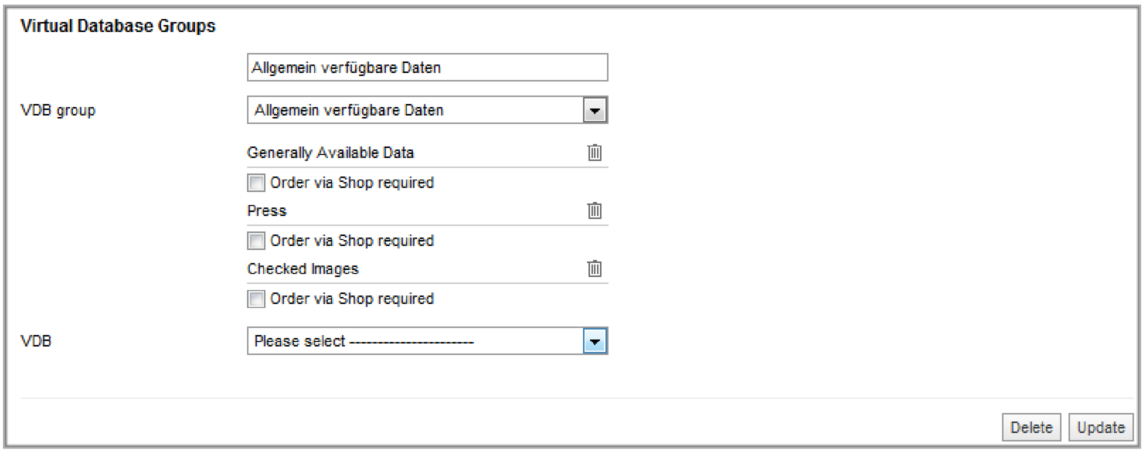
   The dropdown lists *Select approval for assets* and *Select approval for templates* have been added to the input screen.
4. Select a workflow from the *Select approval for assets* selection list.
5. Click *Save*.

The VDB requiring approval has been created and is displayed in the overview of existing VDBs.

4.2 VDB groups

Choose > *Administration* > *Data Structures & Workflows* > *Virtual Database Groups*. You can group multiple virtual databases (VDBs) together in a VDB group. Each user is assigned to a VDB group and, as a result, obtains access to the VDBs that belong to the group and the assets stored in them.

You can also choose which assets can order the media objects in a VDB from the Marketing Shop module only. If you activate the checkbox *Order via Shop required*, users that are assigned to the VDB group place the asset in the shopping cart when they download it. They then have to order the asset.



4.2.1 Creating a VDB group

Prerequisites

- You have the right MANAGE_VDB_GROUPS.
- VDBs have already been created.

Creating a VDB group

1. Choose > *Administration* > *Data Structures & Workflows* > *Virtual Database Groups*.
2. Enter the name of the new VDB group in the input field.
3. From the *VDB* selection list, select the virtual databases that you want to belong to the group. Click the trash can icon to remove a VDB.
4. Optional: Edit the *Order via Shop required*.
5. Click *Create*.

You have created the VDB group.

4.2.2 Editing a VDB group

Prerequisites

- You have the right MANAGE_VDB_GROUPS.
- A VDB group has been created.

Editing a VDB group

1. Choose > *Administration* > *Data Structures & Workflows* > *Virtual Database Groups*.
2. In the *VDB group* selection list, select the VDB group that you want to edit.

   The name of the VDB group is displayed in the input field above the selection list.
3. Optional: Change the name of the VDB group in the input field.
4. Optional: From the *VDB* selection list, select the virtual databases that you want to belong to the group.
5. Optional: Click the trash can icon to remove a VDB from the group.
6. Optional: Change the *Order via Shop required* checkbox.
7. Choose *Update*.

You have edited the VDB group.

4.2.3 Deleting a VDB group

Attention

You cannot reverse the deletion.

Prerequisites

- You have the right MANAGE_VDB_GROUPS.
- A VDB group has been created.

Deleting a VDB group

1. Choose > *Administration* > *Data Structures & Workflows* > *Virtual Database Groups*.

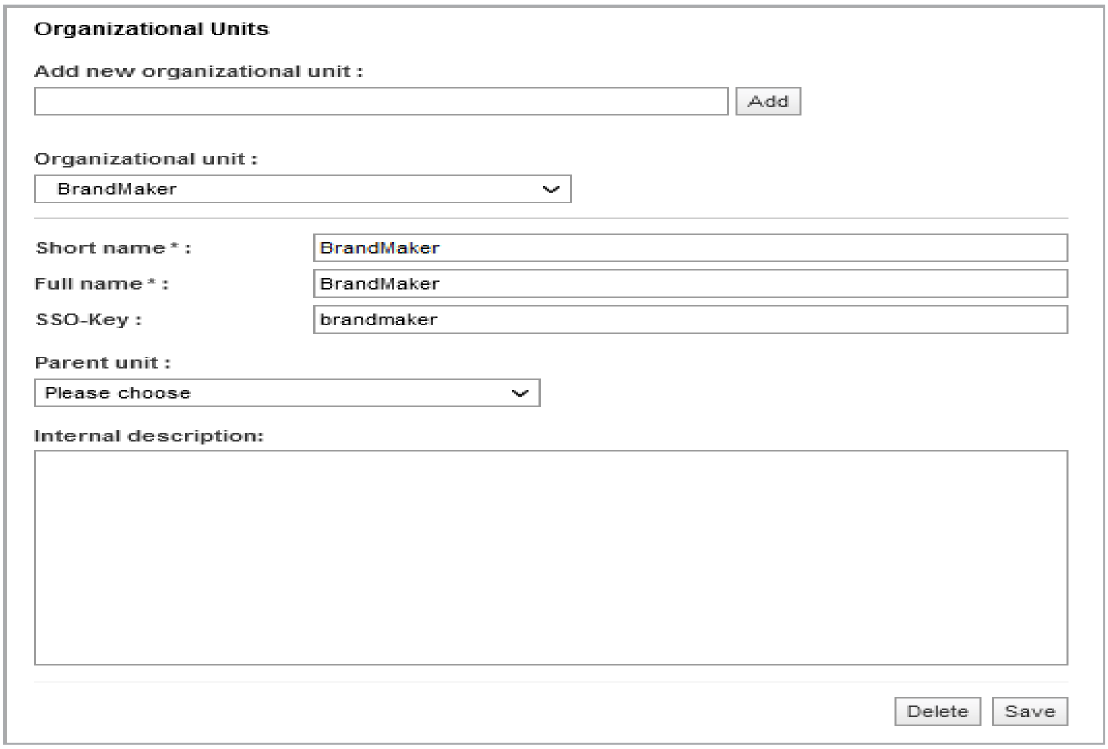
2. In the *VDB group* selection list, select the VDB group that you want to delete.
3. Choose *Delete*.

You have deleted the VDB group.

4.3 Organizational units

Choose > *Administration* > *Users & Groups* > *Organizational units*. You use organizational units to map the hierarchical structure of your company or department. You can use organizational units to:

- Restrict the visibility of assets by permitting access to selected themes only for specific organizational units.
- Approve access to print agencies only for selected organizational units.
- Restrict the visibility of Smart Access tiles by permitting access only for specific organizational units.
- Restrict the visibility of types (Job Manager and/or Marketing Data Hub) by permitting access only for specific organizational units.



From the *Organizational unit* dropdown list, select an existing organizational unit. This loads the selected organizational unit to the input screen.

Note

Mandatory fields are marked with *.

Name	Description
Short name	Enter a short name. Note: When a new organizational unit is created, the name that has been entered is adopted as the short name automatically.
Full name	Enter the full name. Note: When a new organizational unit is created, the name that has been entered is adopted as the full name automatically.
SSO key	You must enter the SSO key if you are using the single-sign-on method to log in. The SSO key is delivered via an interface and checked during login. Note: When a new organizational unit is created, the name that has been entered is adopted as the SSO key automatically.
Parent unit	From the dropdown list, select an entry to arrange the organizational unit in a hierarchy.
Internal description	Enter additional important information.

4.4 Rights and roles

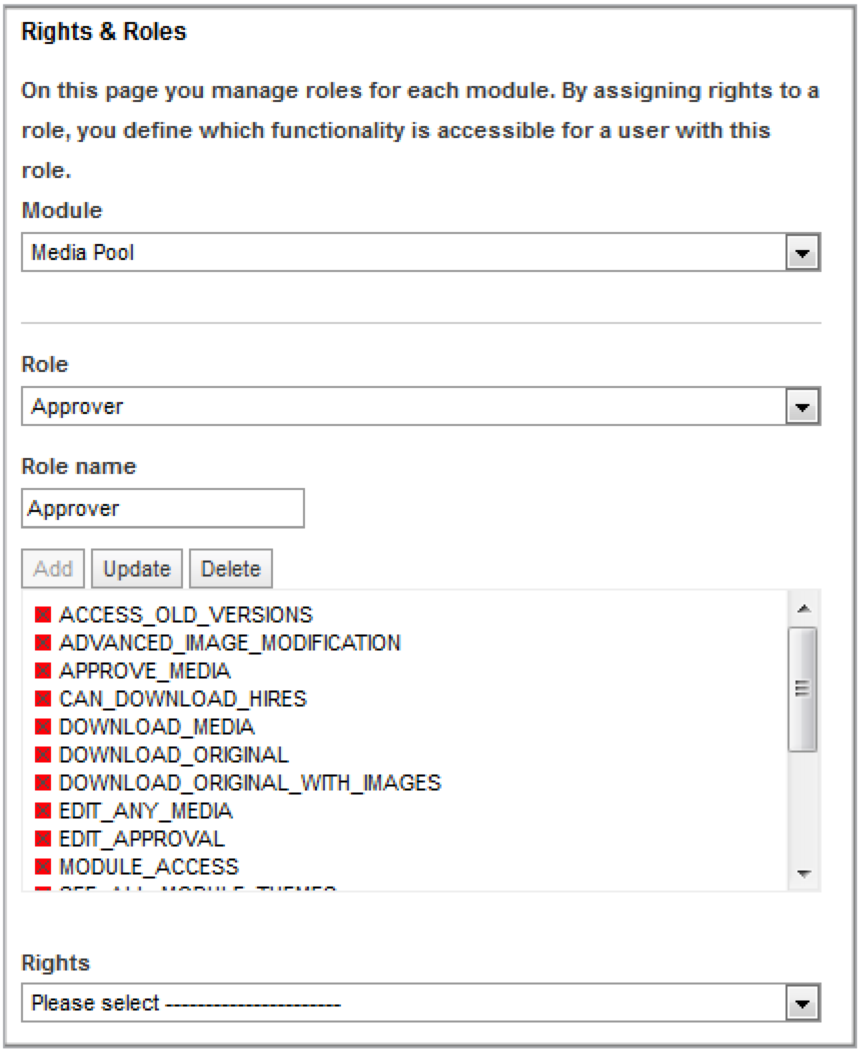
You can use the rights and roles concept to define which functions a user is allowed to execute in the Marketing Efficiency Cloud. Roles describe task profiles and group together rights that are required to complete the tasks. Each user is linked with a role for each module (exception: the Marketing Planner).

Note

We recommend the roles for *Administration*, *Power User*, and *Casual User*, and also roles for external users such as agencies or print agencies.

Note

The rights an roles concept is implemented on a customer-specific basis. If you have any additional questions, contact your BrandMaker contact person.



4.4.1 Creating a role

Prerequisites

You have the right MANAGE_ROLES.

Creating a role

1. Choose > *Administration* > *Users & Groups* > *Rights & Roles*.
2. From the *Module* selection list, select the module to which you want to add a role.
3. Enter the name of the role in the *Role name* input field.

   The *Add* button becomes active.
4. From the *Rights* dropdown list, select the rights to be provided for the role one after the other.

   The selected rights are listed in the window area.
5. Optional: Click the *X* displayed in red to remove a right from the pane.
6. Click *Create*.

You have created the role.

4.4.2 Copying a role

Prerequisites

- You have the right MANAGE_ROLES.
- A role has been created.

Copying a role

1. Choose > *Administration* > *Users & Groups* > *Rights & Roles*.
2. From the *Module* selection list, select the module with the role that you want to copy.
3. From the *Role* selection list, select the role that you want to copy.
4. Change the role name in the *Role name* field.

   The *Add* button becomes active.

5. Change the assigned rights:
    1. From the *Rights* dropdown list, select the additional rights to be provided for the role one after the other.

       The selected rights are listed in the window area.
    2. Click the *X* displayed in red to remove a right from the area.
6. The right has been removed from the window pane.
7. Click *Create*.

You have copied the role.

4.4.3 Edit role

Prerequisites

- You have the right MANAGE_ROLES.
- A role has been created.

Editing a role

1. Choose > *Administration* > *Users & Groups* > *Rights & Roles*.
2. From the *Module* selection list, select the module with the role that you want to edit.
3. From the *Role* selection list, select the role that you want to edit.
4. Optional: Change the role name in the *Role name* field.
5. Optional: From the *Rights* selection list, select the rights to be provided for the role one after the other.

   The selected rights are listed in the window area.
6. Optional: Click the *X* displayed in red to remove a right from the pane.

   The right has been removed from the window pane.
7. Choose *Update*.

You have edited the role.

4.4.4 Deleting a role

Attention

You cannot reverse the deletion.

Prerequisites

- You have the right MANAGE_ROLES.
- A role has been created.

Deleting a role

1. Choose > *Administration* > *Users & Groups* > *Rights & Roles*.
2. From the *Module* selection list, select the module with the role that you want to delete.
3. From the *Role* selection list, select the role that you want to delete.
4. Choose *Delete*.

You have deleted the role.

4.5 Categories

Assets are grouped according to different characteristics. For example, a document may be characterized by its content (e.g., product A), target group (e.g., families), and document type (e.g., brochure). Categories allow you to classify assets based on these different characteristics in order to find them again.

In a category tree created accordingly, it would be possible to find the document in the following branches:

- Portfolio > Product group X > Product range Y> Product A:
  Together with the document, graphics and photos for product A are displayed, as well as brochures for other target groups.
- Target group > Families:
  In addition to the document, photos of families are displayed, as well as a flyer for product B, for which the target group is also families.
- Advertising material > Brochures:
  Brochures that were, for instance, created for product C with the target group Children are also displayed.

If you want to search using categories, click *Browse by Category* in the left-hand area of the page. Choose a category. The hit list automatically displays all the assets that are currently assigned to the selected category, regardless of the other criteria. You can use the search traits to further restrict the result.

> **Note**
>
> Note that categories are created by the individual customer. If you have any questions, please contact your system administrator.

You can also use categories to restrict access to assets. You can use a category in the following ways:

- Approve it for specific modules (the category is displayed only in the approved modules)
- Approve it for specific selected users (the category is only visible to the selected users)
- Approve it for specific selected organizational units (the category is only visible to users from the selected organizational unit)

Categories are used in the following modules:

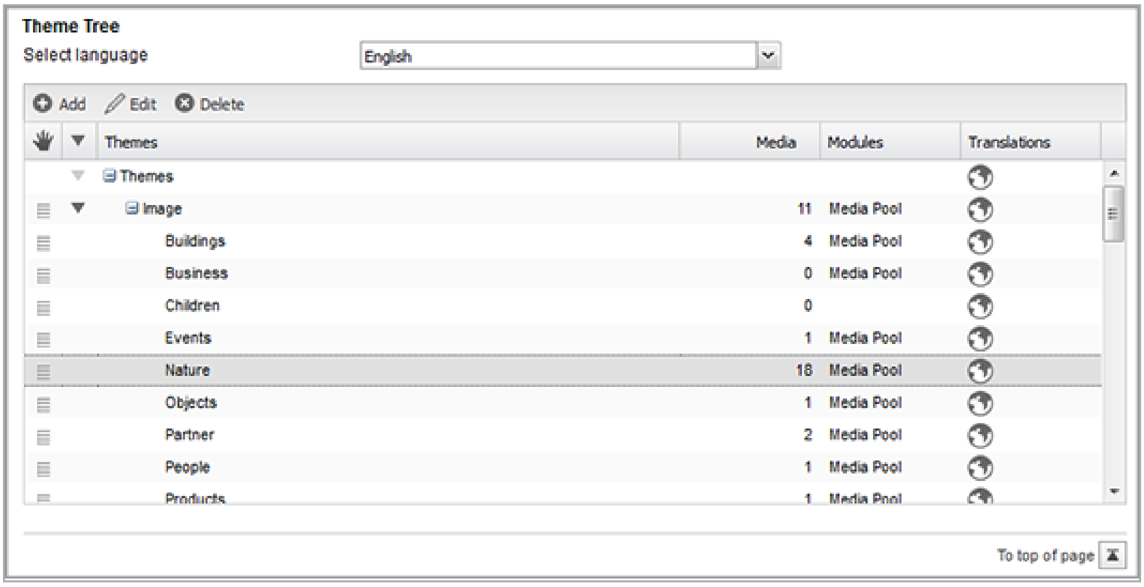
- Job Manager
- Media Pool
- Brand Template Builder
- Marketing Shop
- Marketing Data Hub

Choose > *Administration* > *Data Structures & Workflows* > *Categories* to create a new category or edit an existing one. You can display the categories in separate order for each system language using drag and drop.

> **Note**
>
> The function for sorting the theme tree individually is currently only supported in the *Media Pool* module. In *Brand Template Builder* module, the display of the tree structure is sorted alphabetically.

Prerequisites

- You have the right MANAGE_THEME_TREE.
- You have the right ADD_THEME.



4.5.1 Categories tree structure

Choose > *Administration* > *Data Structures & Workflows* > *Categories* to open the table overview for the existing categories. You can use the upper selection list to select the system language to be used for the table overview. The overview contains the following columns:

Column	Description
	This column is used to move categories within the tree structure: In the line of the category that you want to move, click the icon in this column. Drag the category to the point in the tree structure where you want to add it using drag and drop. Note the instructions displayed on the cursor.
	In this column, you sort the categories alphabetically. To do so, click the icon in the line of the category in this column. All the sub-categories are sorted: • ▲: In ascending order from A to Z • ▼: In descending order from Z to A
Categories	The name of the category is displayed. You can display and hide the sub-categories using the *Plus* and *Minus* signs.
Assets	This displays the number of assets linked to the category.
Modules	This displays the modules in which the category can be viewed.
Translations	This displays whether a translation is available for the category name: gray icon = no translation is available, black icon = at least one translation is available.

Note

You can display or hide the *Assets*, *Modules*, and *Translations* columns in the table overview. To do so, move the cursor to the header line in the area of the column *Categories*, *Assets*, *Modules*, or *Translations*. The button appears on the right-hand edge of the cell. Choose > *Columns* and deactivate or activate the checkboxes for the columns based on your desired display.

Further functions:

Button	Description
Add	This creates a new sub-category for the selected category.
Edit	This opens a dialog box in which you can define the basic data, the access by modules, the access by users, and the access by organizational units for the category.

Button	Description
Delete	This deletes the selected category. The category is removed from the properties of any affected assets.

> **Note**
>
> The top entry, *Categories*, has been created by default and is mandatory. It cannot be edited or deleted, is not approved for any module, and is therefore "invisible".

4.5.2 Properties of a category

In the overview, choose *Edit* to edit the properties of the selected category in a new dialog box. You also edit the properties of a new category when you *add* it. You define the following:

- *Basic data*: Enter the name of the category. Enter the required language version and a description. You can also upload an asset from the Media Pool or upload a locally saved image file as a preview image.

  Note: The category name and its language versions must not contain the "/" character.

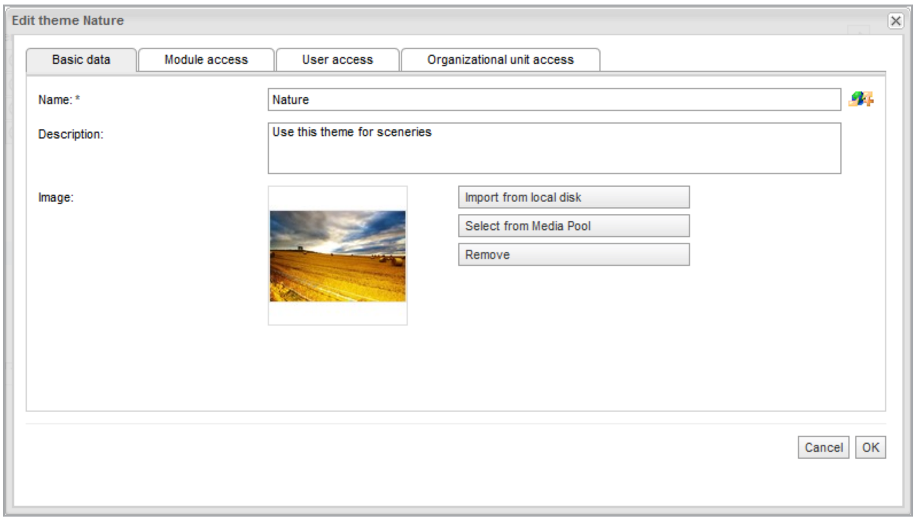
  Note: If you want to assign the category to a Smart Grid in the *Brand Template Builder* module, a preview image is mandatory.

- *Module access*: Activate the checkboxes of the modules in which you want the category to be visible.
- *User access*: Specify the users that can access the category.

  Note: If no users are selected, the category can be viewed by all users, as long as no other restrictions have been defined.

- *Organizational unit access*: Activate the checkboxes of the organizational units that can access the category.

  Note: If no organizational units are selected, the category can be viewed by all organizational units, as long as no other restrictions have been defined.



4.5.3 Example: Adding a category

You want to add the *Advertising material* category to the tree structure. You want the *Advertising material* category to be visible in the *Media Pool* and *Brand Template Builder* modules. You also want to specify that the *Advertising material* category is only visible to the organizational unit *Marketing*. You then want to create the *Brochures* and *Fliers* sub-categories for the *Advertising material* category. You want the same visibilities to apply to both sub-categories. You also want the *Fliers* sub-category to be displayed above the *Brochures* sub-category in the tree structure.

> **Note**
>
> The function for sorting the theme tree individually is currently only supported in the *Media Pool* module. In *Brand Template Builder* module, the display of the tree structure is sorted alphabetically.

Prerequisites

- You have the right ADD_THEME.
- You have the right MANAGE_THEME_TREE.
- The organizational unit *Marketing* has been created.

Adding a category

1. Choose > *Administration* > *Data Structures & Workflows* > *Categories*.

   This opens the *Categories* overview page.

2. Highlight the entry *Categories*.

   Note: The entry *Categories* has been created by default and is mandatory. It cannot be edited or deleted and is not approved for any module and is therefore "invisible".

3. Choose *Add*.

   This opens a new dialog box.

4. On the *Basic data* tab, enter the name *Advertising material*.
5. Optional: Enter the necessary language versions, a description, and a preview image.
6. Go to the tab *Module access*.
7. Activate the checkboxes *Media Pool* and *Brand Template Builder*.
8. Go to the tab *Organizational unit access*.
9. Activate the checkbox for the *Marketing* organizational unit.
10. Choose *OK*.

    You have created the *Advertising material* category below the *Categories* entry. If required, you can change the position of the category using drag and drop.

11. Highlight the entry *Advertising material*.
12. Choose *Add*.

    This opens a new dialog box.

13. On the *Basic data* tab, enter the name *Brochures*.
14. Repeat steps 5 to 10.
15. Highlight the entry *Advertising material*.
16. Choose *Add*.
17. On the *Basic data* tab, enter the name *Flyers*.
18. Repeat steps 5 to 10.
19. Drag the *Fliers* category using drag and drop and place it above the entry *Brochures*.
20. Confirm the information message by choosing *Yes*.

You have created the *Advertising material* category and the *Brochures* and *Fliers* sub-categories.

4.6 Company Vacations and Public Holidays

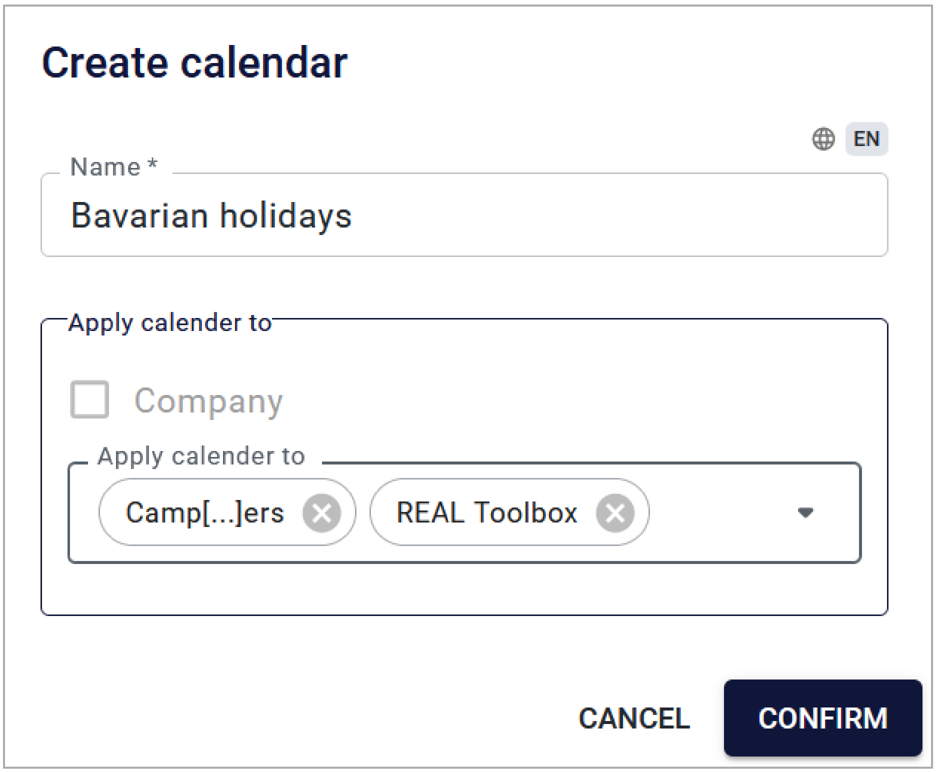
To manage absences within your company as an administrator, you can make calendars available company-wide or to specific user groups only. You enter non-working hours. You can manage public holidays and vacation periods that apply to all or part of the workforce. To distinguish regional holidays in a company, you can assign different holiday calendars to different user groups (depending on the country, federal state or province). This information is then transferred to resource management.

> Note
>
> Not everyone is allowed to manage *Company Vacations and Public Holidays*. For this purpose, a customized role with the right MANAGE_COMPANY_CALENDAR is required for the group of authorized users. This enables you yto reach the configuration page via > *Administration* > *Users & Groups* > *Company Vacations and Public Holidays*.

If there are already existing calendars, the first calendar from the list is automatically selected. For each user group, you can manage a calendar. Users are automatically assigned to the associated calendar if they are a member of a user group that has been mapped to that calendar. The *Select calendar* drop-down menu features a search field. Multiple selections are possible. This allows you to select multiple calendars, which are then displayed in the secondary color in the users' absence calendar.

Create new calendar

1. By pressing the + *Create* button you can create a new, empty calendar.
2. The *Create Calendar* dialog appears.
3. Enter a name.
4. Optional: Enter a localized name in other languages. To do so, click the globe icon.
5. In the *Apply calendar to*drop-down menu, you decide which user groups will be able to see this calendar.



6. Optional: Select the checkbox left of *Company* to make the calendar visible across the entire company.
7. Optional: In the *Apply calendar to* drop-down menu, select more than one user group for which the calendar should be created and visible.
8. Pressing *Confirm* will create the new calendar.

   You have created an empty calendar and can now manually enter company vacations and public holidays.
9. Press the *Save* button at the bottom of the page to apply the changes permanently.

You also have the option of importing a calendar with holidays from an external source.

Customize calendar

You can adjust the calendar permissions after the initial configuration by pressing the *Settings* button.

1. Select the *Settings* button.
2. Remove all user groups one by one by clicking into the white× behind their labels.
3. Now you can use *Apply calendar to* and select company.

You have removed the restriction to individual user groups from an existing calendar. The calendar is now visible for everyone in the organization.

Copy calendar

You can duplicate an opened calendar using the Copy button and use its content as a foundation for creating another calendar.

Delete calandar

The currently selected, hence opened, calendar can be deleted by clicking the *Delete* button (trash icon).

1. *Select Delete* button.

   A confirmation prompt appears: *Would you like to delete the calendar?*

2. The *Confirm* button will delete the calendar irreversibly.

Import calendars

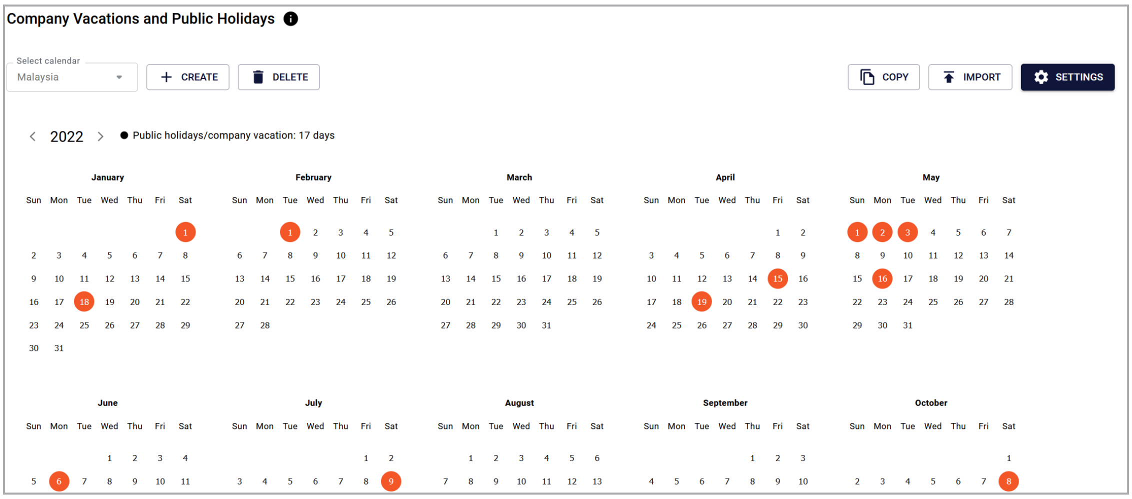
To consider regional holidays in a larger company, you can assign different holiday calendars (depending on the country, region or state) to specific user groups.

For this purpose, you can import calendars from external sources according to the open iCalendar standard. Supported file types for calendar data are: .ics, .ifb, .iCal and .iFBf.

1. Visit a website such as Calendarlabs to access up-to-date calendar files for importing separately by country or province.
2. Select a calendar where you want to make the import.
3. Use the *Import* button to open the import dialog of your file system. Select a previously downloaded or otherwise created calendar file and selectthe *Open* button .

   The calendar will be updated. The imported calendar records will be added to the existing records of the selected calendar.

4. Press the *Save* button at the bottom of the page to apply the changes permanently.



You have successfully imported an external holiday or vacation calendar into the system.

> **Note**
> Sometimes errors occur during the import or the calendar is apparently imported but does not show any dates in the software. This is not a system error, but probably a defective or non-standard calendar file. You can validate if a calendar file from an external source complies with the valid standard on the official website of iCalendar. To do so, visit the following external link: https://icalendar.org/validator.html
> Upload the calendar file in question there for verification.

5

Data Structures & Workflows

5.1 Custom objects and structures

You can use custom objects and structures to define values for dropdown lists centrally, provide selectable text and image-box content for documents in *Brand Template Builder* module, and configure variants of templates in *Brand Template Builder* module. Custom structures can be used across multiple modules:

- *Data Sheet Engine*: You can use custom structures as data sources for the *Single Select*, *Multiselect*, *Datepicker*, *Single inputline*, *Multiline input area*, and *Combobox* variables.
- *Brand Template Builder (templates)*: You can use custom structures as data sources for *Template dropdowns* and *Smart dropdowns*.
- *Brand Template Builder (documents)*: You can use custom structures as data sources for selectable boilerplate texts or images.

Nested custom structures

You can nest custom structures with each other to create a relationship between two structures. For example, you can create a custom structure (Our affiliates) to store affiliate address information. In a second custom structure (Our departments), you can create information for the individual departments such as the names of the departments and the department manager, for example. Since each department is assigned to an affiliate, you can nest the two custom structures. This allows you, for example, to use nested custom structures to make it easier to edit documents in *Brand Template Builde*r module. Users can use a dropdown list to first select a branch and then select the appropriate departmental information to use the correct information in the document automatically.

Administration

To create and manage custom objects and structures, choose *> Administration > Data Structures & Workflows > Custom Objects & Structures*:

Name	Description
> Custom Structures	You can create a new custom structure or edit an existing structure.
> Custom Objects	You can add new custom objects to a custom structure or edit the existing objects of a custom structure.
> Import/Export	You can export the custom objects and/or structures and update or create existing structures and objects by importing an Excel file.

Name	Description
> Affiliate Structures	This page is relevant only if the custom objects of employees of an affiliate or authorized users can be edited. You can use the page to select and edit the structures and objects that are approved for editing.

5.1.1 Custom structures

To create a custom structure, enter a name in the *Add new structure:* field. Note that the name must begin with "PM_" if you want to use the custom structure in the Job Manager or in Marketing Data Hub. The displayed name can be different from this name. Then select the type of custom structure. In the Marketing Efficiency Cloud, there are two different types of custom structures:

- *System*: These custom structures are used to define system-relevant settings such as the output method or the color for templates in Brand Template Builder module (template design step 1), for example.

  Note: These custom structures are usually created during the configuration of the Marketing Efficiency Cloud. If you have any additional questions, please contact your contact person.

- *Default*: You can use these custom structures to create your own custom structures and objects, which allows you, for example, to define selectable boilerplate texts for documents in *Brand Template Builder* module.

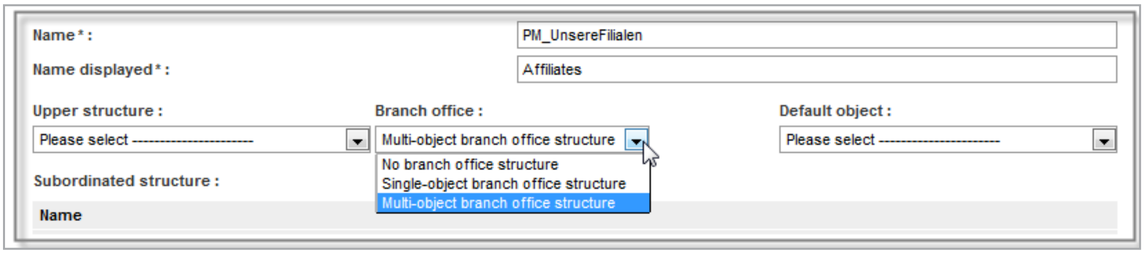
Click *Create* to create the custom structure. You can then select and edit the custom structure in the field for existing structures.

Additional configuration options for custom structures

You can define additional options for custom structures when you create them:

- You can create custom structures that are dependent on each other to, for example, create a dropdown list that users can use to first select a state and then select the appropriate cities from a list.
- You can define whether the custom objects that are added to the custom structure can be edited by authorized users (for example, employees of an affiliate).
- You can define a default entry for dropdown lists.

Name	Description
Upper structure	Assign an upper structure to the structure if you want to create a selection field that depends on a selection made earlier. Select the custom structure as an upper structure that the selection field must depend on.
Branch office	You can specify whether the custom objects in the structure can be edited by a branch: • *No branch office structure*: The custom objects cannot be modified. • *Single-object branch office structure*: The custom object that is added to the custom structure can be edited. Note: Authorized users cannot create new custom objects because the number of custom objects is limited to 1. • *Multi-object branch office structure*: All of the custom objects that are added to the custom structure can be modified. Note: Authorized users can edit the custom structures that have been approved for editing by choosing > *Administration* > *Data Structures & Workflows* > *Custom Objects and Structures* > *Affiliate Structures*.
Default object	Define a custom object that has been added to the structure as the default entry.



Attributes

A custom structure has attributes that provide access to "content" such as texts or images. Attributes can be:

Name	Description
Text	This attribute is used to provide a single input line without formatting options for the custom objects.

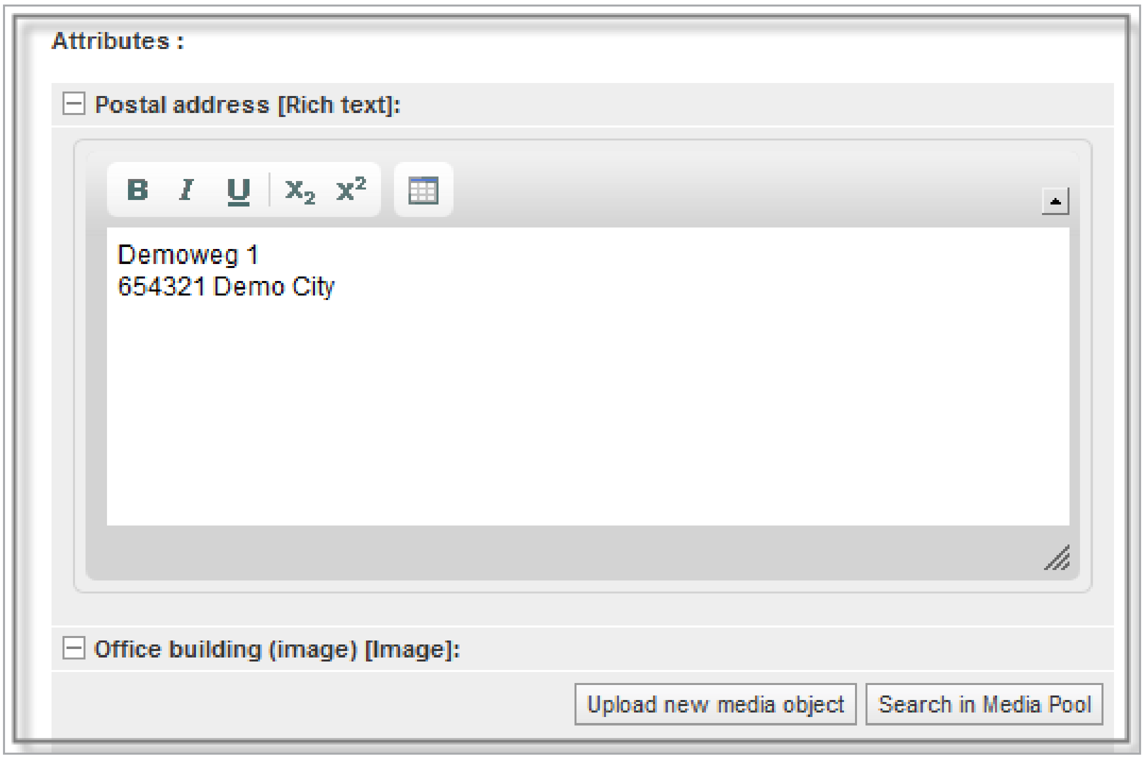
Name	Description
Rich text	This attribute is used to provide a text field with formatting options (for example, bold, italics, underline, subscript, superscript, table) for the custom objects. You specify the formatting options that are available to the user by selecting an editor configuration (see Editor configuration). At minimum, the maximum number of characters for a rich-text attribute is high enough that you can fill 26 DIN-A4 pages.
Image	This attribute can be used to add an asset from the Media Pool or a locally saved image to a custom object. Activate the checkbox *Use this image for custom object selection* to use the object as a dropdown in a template in *Brand Template Builder* module. Note: The checkbox can be used only for the first image attribute.
Date	This attribute is used to provide a date field with a date picker for the custom objects.
Floating point number	This attribute is used to provide an input field for floating point numbers for the custom objects.
Whole number	This attribute is used to provide an input field for whole numbers for the custom objects.

Attention

Do not delete any attributes that are already in use. Objects that use deleted attributes can no longer be used.
Use the status of a custom object to specify that the object is no longer in use.

5.1.2 Custom Objects

You can add custom objects to a custom structure. You can use the attributes of the custom structure to store required information (a boilerplate text or an asset, for example) for each custom object.



Use the *Status* to define how the custom object can be used:

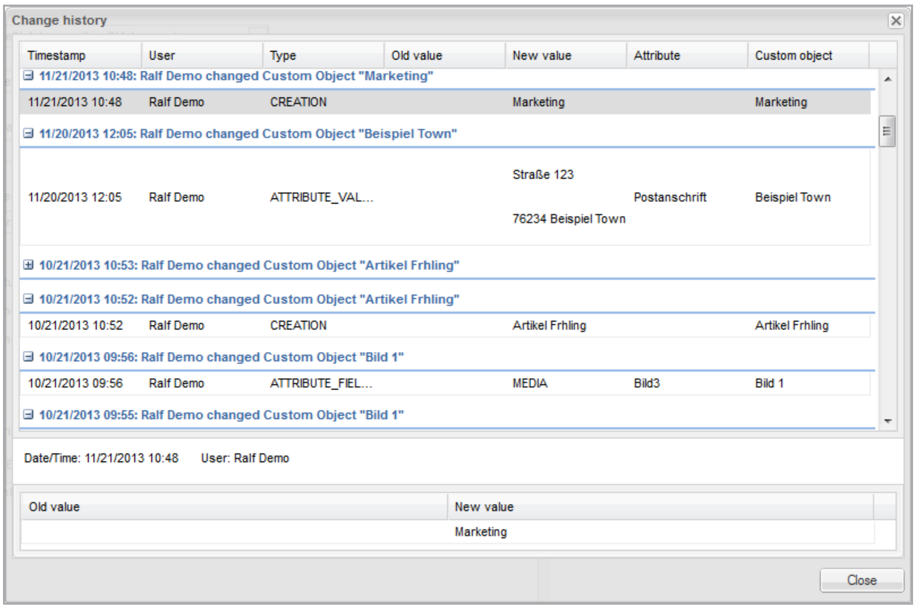
Name	Description
Available for New and Edit	The custom object can be used in new and in existing documents.
Only available for editing	The object cannot be used for new documents. The object is displayed for existing documents if it was already selected before this status was set. If the selection is changed, the custom object is hidden.
Not available	The object cannot be used either for new or for existing documents. Note: Attributes that are already in use cannot be deleted. To prevent objects that are no longer required from being used, you must set the status of the object to Not available.

5.1.3 Change history

To track the editing of custom objects, changes are saved in a change history. You can call changes from the last 30 days, 6 months, or all of the changes made since the object was created. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects* and then choose:

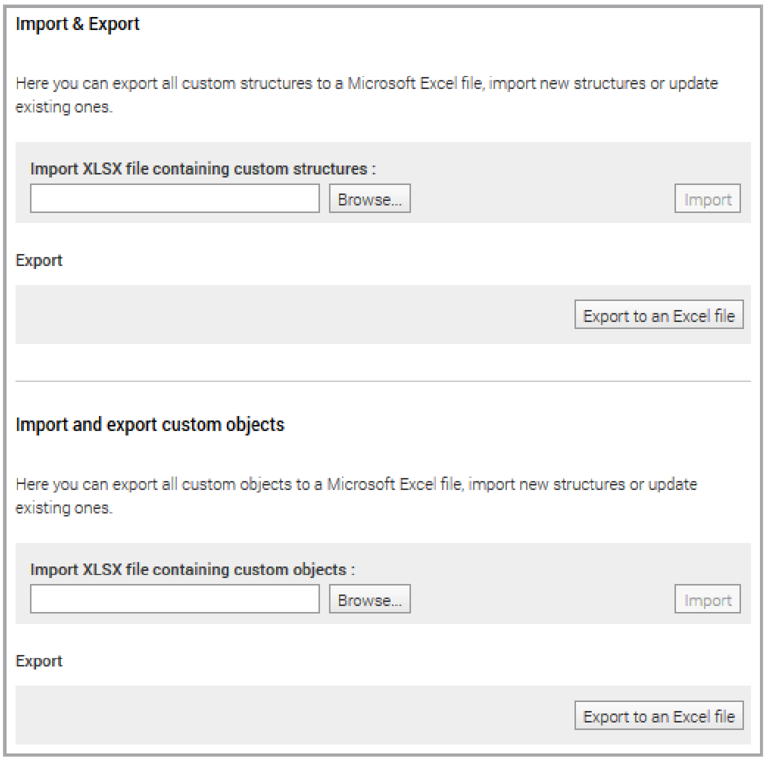
- *Global change history*: This calls the change history of all the custom objects for every custom structure.
- *Change history*: This calls the change history of the selected custom object.

Select a line in the table overview to load the old and new value in the lower area of the dialog box.



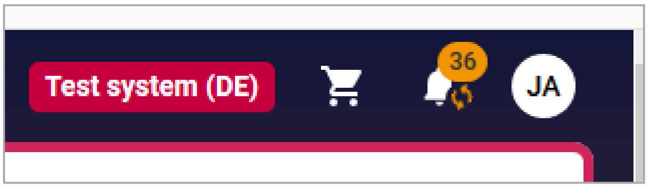
5.1.4 Import and Export

You can export custom objects and structures as an XLSX file and import an edited file again. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Import & Export*.



How it works

All the existing custom structures and their objects are included in the export. The export is performed in the background. As long as the export is running, this is indicated by the bell symbol in the header of the application:



When the export is complete, a checkmark on the bell symbol appears in the header of the application:

After the export is complete, the file will be downloaded automatically. Follow the instructions of your operating system.

If you want to download the file manually, click the bell icon. A menu will open showing the result of the export and the recent messages. To download the export result, move the cursor to the export name. Then two buttons will appear: Click *Download* to download the export. Click *Discard* to delete the result. The download link is valid for 3 hours.

An import is also processed in the background, i.e. you trigger the process and can then exit the page > *Administration > Data Structures & Workflows > Custom Objects & Structures > Import & Export*. As long as the import is running, this is indicated by the bell icon in the header of the application, just as with the export. You can access the status in the menu of the bell icon.

You cannot delete structures or objects through an import. The data from the Excel file is compared to the existing data in the system: Existing data in the system is overwritten data that is unavailable in the system is created with the information from the Excel file. For the sake of clarity, we generally recommend deleting data records that you do not want to change from the Export file and importing only changed and new data.

You can import only XLSX files with two data sheets: The name of the first data sheet must be *structures* and it must contain the data from the custom structures and attributes. Refer to the *Data sheet structures* section below. The second data sheet must be called *objects* and must be filled with the data from the custom objects. Refer to the *Data sheet objects* section below.

When exporting custom structures and objects, note the restrictions with regard to the maximum number of rows in Microsoft Excel. If the entries exceed the maximum number of rows, you can distribute the data to several Excel files and import these.

Data sheet *structures*

For more information, refer also to the chapter *Custom structures* on page 69.

Column	Description
List ID	The name of the custom structure, which must not be changed.
List name	The displayed name for the custom structure, in the following notation: • Monolingual entry: {"default":nnnn"} • Multilingual entry: {"default": "nnnn1", "de-de": "nnnn2", "it-IT":"nnnn3","fr-FR":"nnnn3"}
Type	The type of the custom structure: DEFAULT or SYSTEM
Parent list ID	List ID of the parent structure
Default entry name	Default object

Column	Description
Affiliate type	Affiliate type: • NON_AFFILIATE_STRUCTURE: not an affiliate structure • SINGLE_OBJECT_AFFILIATE_STRUCTURE: affiliate structure with 1 object • MULTI_OBJECT_AFFILIATE_STRUCTURE: affiliate structure with multiple objects
Show preview for list entry	Property *Use this image for custom object selection:* VALUE_MEDIA_XX is entered; in this case, XX is replaced by the number of the image attribute used in the selection (see the next line)

Attrib-utes	Attribute definition with the following notation:
	[{"number-
	":x,"-
	name":"n-
	nnn","label":"lllll","comment":"ccccccc","order":y,"type":"TEXT","props":null},
	{....},....]
	• number: attribute number assigned by the system (x)
	• name: the unique name for the attribute (nnnn)
	• label: the displayed name (lllll)
	• comment: a comment (ccccccc)
	• order: the position of the attribute (y)
	• type: the attribute type possible values:
	    • TEXT: text without formatting
	    • RICHTEXT: text with formatting
	    • MEDIA: image
	    • DATETIME: date
	    • FLOAT: floating-point number
	    • INT: whole number
	• props:
	    • Attribute type RICHTEXT: ID of the selected editor configuration, such as "props":{"ckeditor_id":"1"};
	    • Other attribute types: "props":null

Data sheet *objects*

For more information, refer also to the chapter *Custom Objects* on page 71.

Column	Description
List ID	ID of the custom structure to which the object is assigned
Name	Unique name of the custom object
Label	The displayed name for the custom object, in the following notation: • Monolingual entry: {"default":nnnn"} • Multilingual entry: {"default": "nnnn1", "de-de": "nnnn2", "IT":"nnnn3","FR":"nnnn3"}
Parent entry name	Parent object
Status	Status of the custom object; possible values: • EDIT_AND_ADD: available for adding and editing • ONLY_EDIT: available only for editing • ONLY_DELETE: not available
Affiliate	ID of the assigned affiliate
Attributes	Attribute vales in the following notation: [{"number":x,"attributeName":"nnnn","value":"VVVVV","type":"TEXT"},{...},...] • number: attribute number assigned by the system (x); see the table for the data sheet *structures* • attributeName: the unique name of the attribute (nnnn); see the table for the data sheet *structures* • value: the value of the attribute (VVVVV) • type: the attribute type; for the possible values, see the table for the data sheet *structures*

5.1.5 Examples

5.1.5.1 Creating a custom structure

You want users to be able to select the affiliates *Sample City*, *Demo City*, and *Sample Town* from a dropdown list. You therefore require the custom structure *Our affiliates* (technical name *PM_OurAffiliates*) with the affiliates as the corresponding custom objects so that they can be used as the data source for the dropdown list. Since you want the *Contact information* for the three affiliates (*Postal address*, *Website* and *Phone number*) to be transferred automatically, you must enter the *Contact information* in the attributes of the custom objects.

> Note
>
> For a custom structure to be selected as a data source in the Job Manager, or Marketing Data Hub, the "technical" name must begin with "PM_".

Prerequisites

- You have the right MANAGE_CUSTOM_OBJECTS.
- You have the right MANAGE_CUSTOM_STRUCTURES.

Creating a custom structure

Part 1

1. Choose > *Administration > Data Structures & Workflows > Custom Objects & Structures > Custom Structures.*
2. Enter *PM_OurAffiliates* as the name in the *Add new structure* input field.

   Note: You can also change the name and the displayed name for the custom structure at a later stage.
3. From the dropdown list next to the input field, select the entry *Default*.
4. Click *Create*.

   This creates the custom structure *PM_OurAffiliates*. The input fields *Name* and *Name displayed* are prefilled.
5. Enter *Our affiliates* in the *Name displayed* input field.

   Note: You can change the entered (technical) *Name* if required. Umlauts and special characters cannot be used.

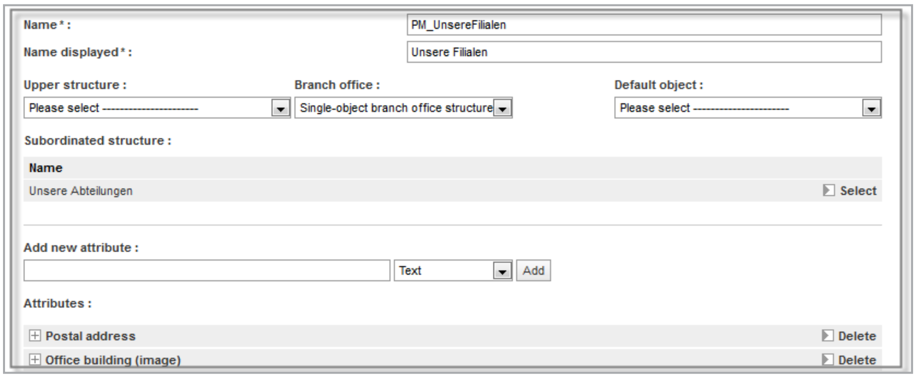
6. Leave the *Upper structure*, *Branch office*, and *Default object* dropdown lists empty.
7. Enter *Postal address* in the *Add new attribute* input field.
8. From the dropdown list next to the input field, select the entry *Rich text*.

   Note: If you do not want to format the attribute text, select the entry *Text*.
9. Choose *Add*.

   You have created the attribute *Postal address*.

   Note: You can use the *Position* input field to define the order of the attributes. The attribute with the position 1 is displayed in the highest position. Click the *Plus* sign for an attribute to display the *Position* input field.
10. Repeat steps 6 to 8 for the attribute *Website*.
11. Repeat steps 6 to 8 for the attribute *Phone number*. Select the entry *Text* in step 7 for the *Phone number* attribute.
12. Click *Save*.

You have created the custom structure *Our affiliates* and the attributes *Postal address*, *Website*, and *Phone number*.



Part 2

You now want to create the custom objects for the custom structure *Our affiliates*.

1. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects.*
2. From the *Select custom structure* dropdown list, choose the entry *Our affiliates*.

   The *Our affiliates* entry is transferred to the lower input field automatically.

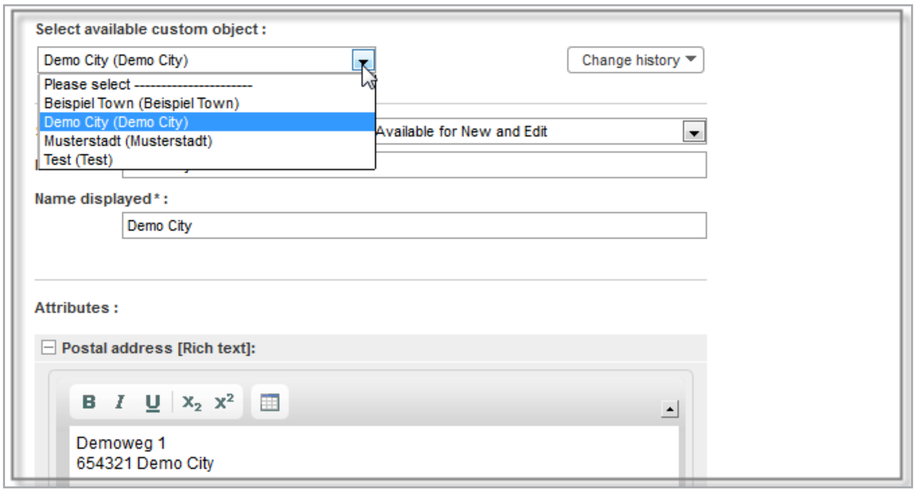
Note: The "technical" name *PM_OurAffiliates* is displayed in brackets. You can change the stored technical name if required. Note that you may only use the characters [a-z], [A-Z], [0-9], _.

3. Choose *Select*.
4. The *Create new custom object* input field is displayed.
5. Enter the affiliate *Sample City* in the *Create new custom object* input field.
6. Click *Create*.

   The following additional input fields are displayed and prefilled.
7. For the *Status* dropdown list, choose *Available for New and Edit*.
8. Optional: You can edit the *Name* and the *Name displayed*.
9. Enter the required information for the attributes *Postal address*, *Phone number*, and *Website* in the relevant input areas.

   Note: For the attributes *Postal address* and *Website*, which were created as rich text, you can use the formatting options that are displayed.
10. Click *Save*.
11. Repeat steps 4 to 9 for the affiliates *Demo City* and *Sample Town*.

You have created the affiliates *Sample City*, *Demo City*, and *Sample Town*, including the relevant contact information, as custom objects for the *Our affiliates* custom structure.



5.1.5.2 Using a custom structure as a data source

5.1.5.2.1 Step 1: Assigning a custom structure as a data source

You have created the *Our affiliates* custom structure and the affiliates *Sample City*, *Demo City*, and *Sample Town* as custom objects. You now want to use the custom structure as a data source for a Multiselect on the data sheet of the job type *Special promotions - affiliates* so that the users can select the affiliate when they create a new job.

Prerequisites

- You have the rights that are required to configure a data sheet.
- The "technical" name of the custom structure *Our affiliates* begins with "PM_" (*PM_OurAffiliates*).
- You have created the job type *Special promotions - affiliates*.

Assigning a custom structure as a data source

1. Choose > *Administration* > *Datasheet Engine* > *Variables*.
2. From the upper dropdown list, select the type *Special promotions - affiliates*.

   A list of the existing variables is displayed.
3. Choose *Create new*.

   The *Modify Variable* dialog box opens.
4. From the *Type* dropdown list, select the entry *Multiselect*.

   The input fields required to create the variable are displayed.
5. Enter the name that you want to use to display the dropdown list on the data sheet (for example, *Select affiliate*).
6. Select the *Style* for the *Multiselect*:
   - *CheckBoxArea*

     Note: If you select *CheckBoxAreaWithImages* as the style, an existing image attribute is displayed as the preview image.
7. Select the *Our affiliates* custom structure as the *Data Source*.
8. Optional: Select a default value for the Multiselect.
9. Optional: Define whether the Visibility of the multiselect is to be dependent on a different variable.
10. Click *Save*.

You have created a multiselect and defined the custom structure *Our affiliates* as its data source. You can place and use the multiselect on the data sheet.

5.1.5.2.2 Step 2: Placing a multiline selection on a data sheet

You want to place and use the multiselect that you have created, *Select affiliates*, on the *Special promotions - affiliates* data sheet.

Prerequisites

You have the rights that are required to configure a data sheet.

Placing a multiline selection on a data sheet

1. Choose > *Administration* > *Datasheet Engine* > *Datasheet Layout*.

   This opens the overview of the existing types.

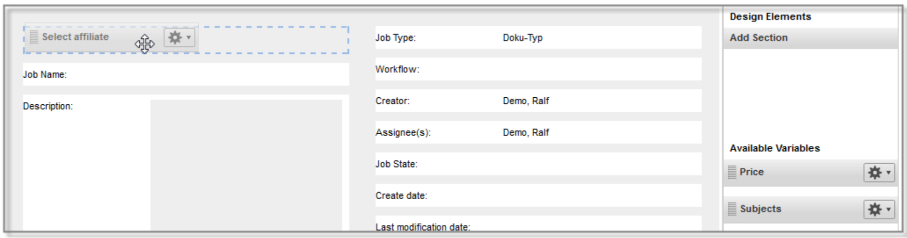
2. Click the *pencil* icon for the type *Special promotions - affiliates*.

   This opens the data sheet for editing. The *Select affiliates* multiselect is displayed below the *Available Variables*.

3. Go to the tab on which you want to place the multiselect.

4. Drag the *Select affiliates* multiselect onto the data sheet using drag and drop.

   Note: A dashed line assists you while placing the multiselect.

5. Click *Save*.

You leave edit mode for the data sheet. You have placed the multiselect on the data sheet.

> **Note**
>
> Choose > *Administration* > *Datasheet Engine* > *Publish changes* to permanently activate datasheet editing. Note that this also brings other changes made for the modules *Job Manager* and *Marketing Data Hub* into effect.

5.1.5.3 Connecting a custom structure to a template

In the *Our affiliates* custom structure, you have defined the *contact information* for the affiliates (*Postal address*, *Website*, and *Phone number*). You now want to use the *Our affiliates* custom structure in the template for *Calling cards* in the *Brand Template Builder* module. This should make it easy for users to select their affiliate. You want the stored contact information to be transferred to the relevant fields automatically.

> **Note**
>
> The template design feature in the *Brand Template Builder* module is divided into six work steps. Only the settings that are relevant to custom structures in *Step 3* (text and image box configuration) and *Step 4* (for assigning alternative images and text suggestions to the boxes and placeholders) are described below.

Prerequisites

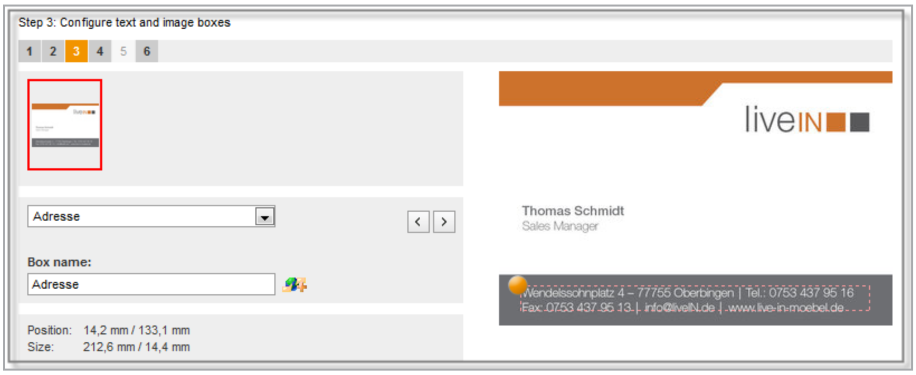
- You have the right MODUL_ACCESS for *Brand Template Builder* module.
- You have the right ACCESS_TEMPLATE_OPERATIONS for accessing the template design functions in *Brand Template Builder* module.
- You are authorized to edit existing templates in *Brand Template Builder* module (using the right EDIT_ALL_TEMPLATES or EDIT_OWN_ORG_TEMPLATES, for example).
- A suitable template is available. For the contact information, text boxes for the *Postal address*, *Website*, and *Phone number* have been created in the template.

Connecting a custom structure to a template

Step 3 of template design: Configuring text and image boxes

1. Open the template *Calling cards* in the *Template design*.
2. Go to *Step 3* in the template design.
3. From the upper dropdown list, select the text box in which you want the *Postal address* to be stored.

   The box that is currently selected is highlighted in color in the preview image in the pane on the right.

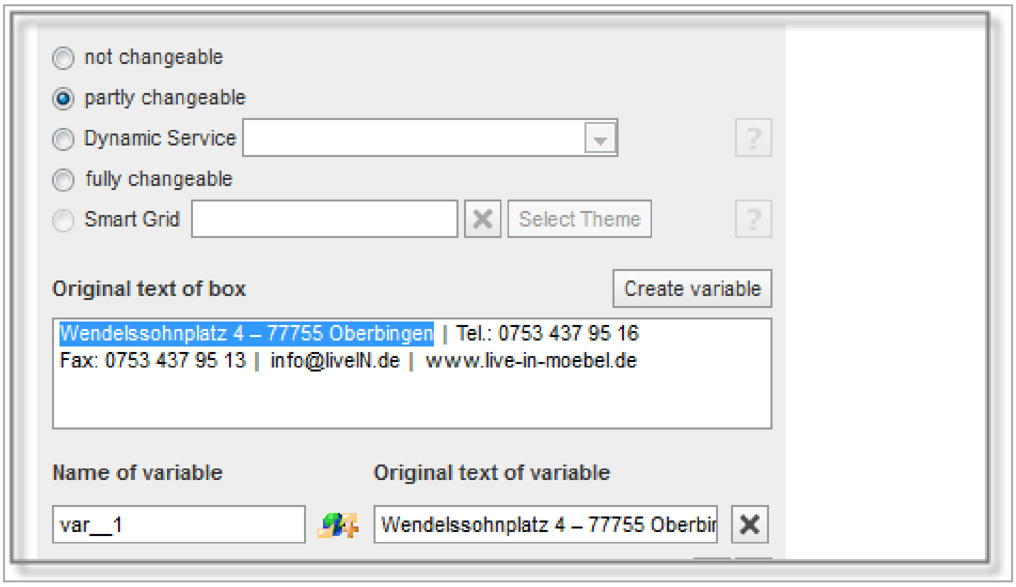


4. Optional: In the *Box name* input field, enter the name to be used to display the field in document.
5. In the option fields area, select the option *partly changeable*.
6. In the *Original text of box* text field, select the passage that you want to change with the information stored in the custom structure (the *Postal address*, *Phone number*, and *Website*, for example).

   Note: You can only select single-line text passages.

7. Click *Create variable*.

   A variable is created below the text field. The *Name of variable* field is initially prefilled with *var__1*, for example.



8. In the *Name of variable* fields, enter the names that you want to use to display the fields (for example, *Affiliate address*).
9. In the lower area of the screen, choose *Next*.

This brings you to Step 4 in the template design.

Step 4 of template design: Assigning alternative images and text suggestions to boxes and placeholders

1. From the upper dropdown list, select the text box that you have just edited (*Affiliate address*, for example).

   The original text is loaded to the text field in the *Content type selection* area.

2. In the *Apply structure and attribute* area, click the arrow icon.

   This opens the *Template dropdowns* dialog box.

   Note: There are two different types of dropdown *Brand Template Builder* module. Template dropdowns are valid only for the current template. Smart dropdowns can be used in all templates.

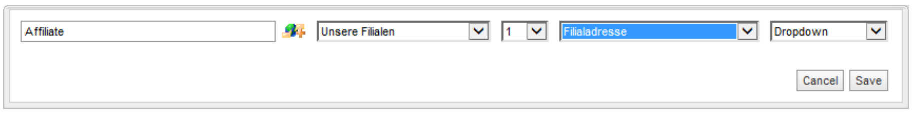
3. Click *Manage Dropdowns*.

   This opens the *Manage dropdowns* dialog box.

4. Click *Add new dropdown*.

   This opens a new dialog box.

5. In the first input field, enter the *Name* (for example, *Affiliate address*) to be used to display the dropdown list when you edit a document. In the drop-down list, choose the custom structure *Our affiliates*. In the next dropdown list, select the entry *1*. In the next dropdown list, select the variable that you have created for the text box (*Affiliate address*). From the last dropdown list, select the entry *Dropdown*.

   Note: By selecting the value *1*, you specify that the dropdown list that you have created (Affiliate address) is displayed when you edit the document (step 3). Select the entry *0* so that the affiliate address can be selected in step 1 (Choose variant).

6. Click *Save*.

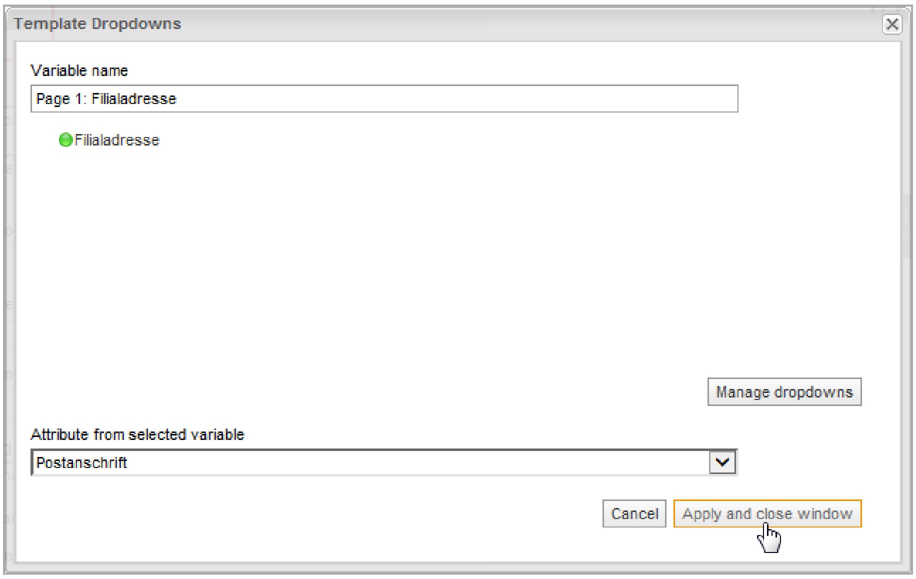
   You return to the *Manage dropdowns* dialog box.

7. Choose the *X* icon to close the dialog box.

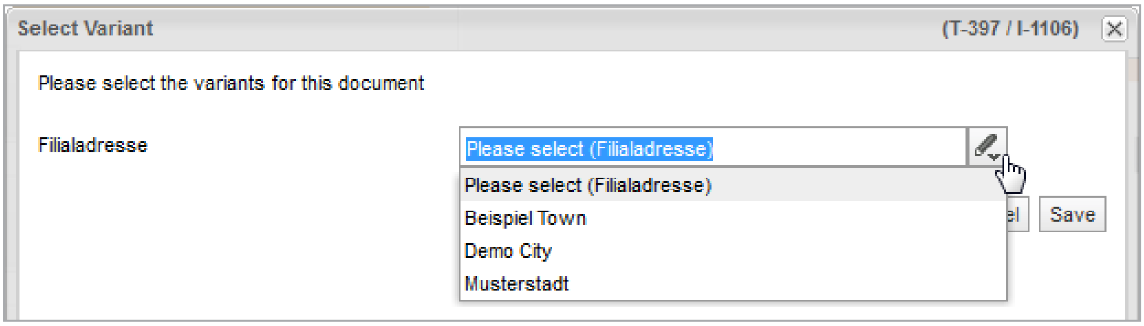
   You return to the *Template dropdowns* dialog box.

8. Activate the entry *Affiliate address*.

9. From the *Attribute from selected variable* dropdown list, select the entry *Postal address*.
10. Choose *Apply and close window*.



This closes the dialog box. You have assigned the attribute *Postal address* to the text box. The affiliate address is selected as the variant when you create a document.



5.1.5.4 Nesting custom structures

You want to nest the custom structures *Our affiliates* and *Our departments* with each other. The nested structure can then be linked to a template in Brand Template Builder module, for example. Users can then use a selection list to first select an affiliate and then select the appropriate departmental information (such as *Department name*, *Department manager name*, *Department code*, for example) so that the correct information is used automatically in the document in Brand Template Builder module.

Prerequisites

- You have created the *Our affiliates* custom structure.
- You have the right MANAGE_CUSTOM_OBJECTS.
- You have the right MANAGE_CUSTOM_STRUCTURES.

Nesting custom structures

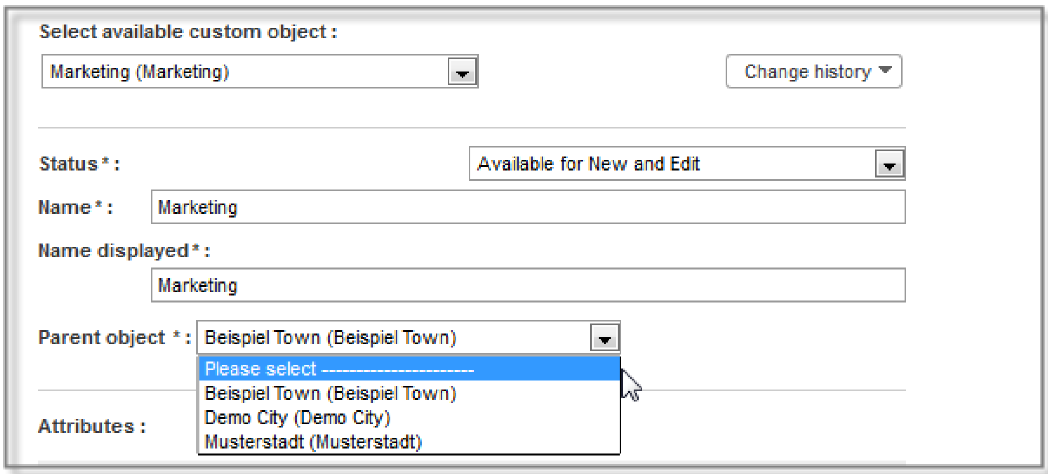
Creating the *Our departments* custom structure and its attributes

1. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Structures.*
2. Enter *Our departments* as the name in the *Add new structure* input field.

   Note: You can also change the name and the displayed name for the custom structure at a later stage.
3. From the dropdown list next to the input field, select the entry *Default*.
4. Click *Create*.

   You have created the *Our departments* custom structure and loaded it to the *Select available structure* dropdown list.
5. From the *Upper structure* dropdown list, choose the entry *Our affiliates*.
6. Click *Save*.

   You have assigned the *Our departments* custom structure as a child of the *Our affiliates* structure.
7. Add the *Department name*, *Department manager*, and *Department code* to the structure as text attributes.



8. Click *Save*.

You have created the *Our departments* custom structure and the *Department name*, *Department manager*, and *Department code* attributes.

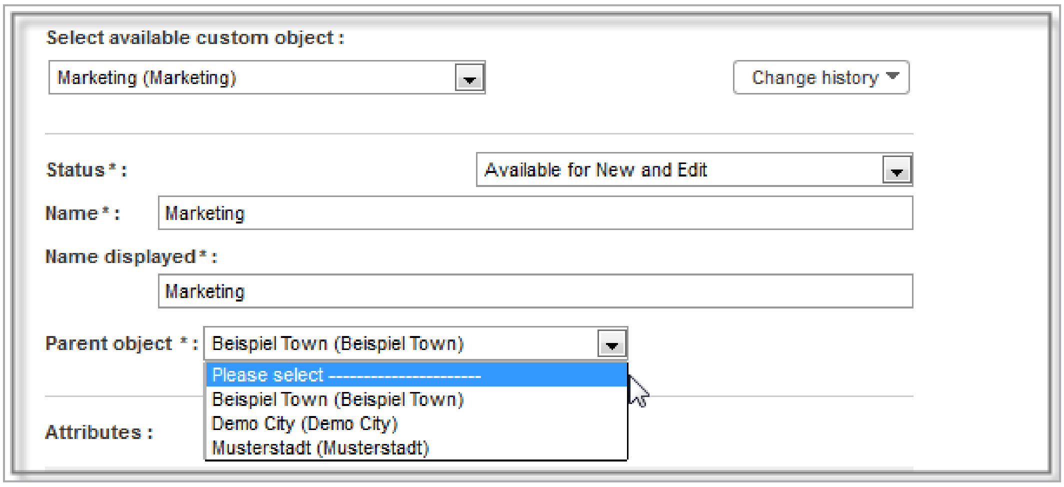
Creating and assigning custom objects for the *Our departments* structure

1. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects.*
2. From the *Select custom structure* dropdown list, choose the entry *Our affiliates*.

   An additional dropdown list is displayed.
3. From this dropdown list, select the entry *Our departments*.
4. Choose *Select*.

   The *Create new custom object* input field is displayed.
5. Enter the name of the custom object in the input field (for example, *Marketing*). The name of the custom object corresponds to the department name.
6. Click *Create*.

   The input screen is extended.
7. From the *Parent object* dropdown list, select the affiliate (*Sample Town*, *Demo City*, *Sample City*) to which you want to assign the *Marketing* custom object.

8. Enter the information for the attributes *Department name*, *Department manager*, and *Department code* in the input fields.
9. Click *Save*.
10. Repeat steps 5 to 9 to assign all of the required departments to the affiliate.

You have created the custom objects for the *Our departments* custom structure and assigned the objects to the *Our affiliates* structure.

5.2 Keywords

You can use keywords to characterize assets (for example, by target group or related product). The administrator maintains the keywords and controls the terminology that is used. The user can request keywords, which the administrator can approve or reject. The benefit of this function is that the keywords are created and controlled systematically. The disadvantage is that the specified structure is not equally applicable to all assets.

> Note
>
> Note that you can also describe assets using tags. In this case, each user can enter keywords without any regulations. The benefit is that users can characterize assets simply and on an individual basis. The disadvantage is that this may result in a large number of keywords without any kind of system, and the keywords may be used in different ways.
> You can use both tags and keywords simultaneously. However, this cancels out their respective benefits. BrandMaker therefore recommends that you only use one of the methods.

5.2.1 Creating a new keyword

Creating an individual keyword

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.
2. At the bottom of the overview, choose *New keyword*.
3. Enter the keyword.
4. Click the *Save* button.

The keyword has been created and can be used immediately.

Creating multiple keywords

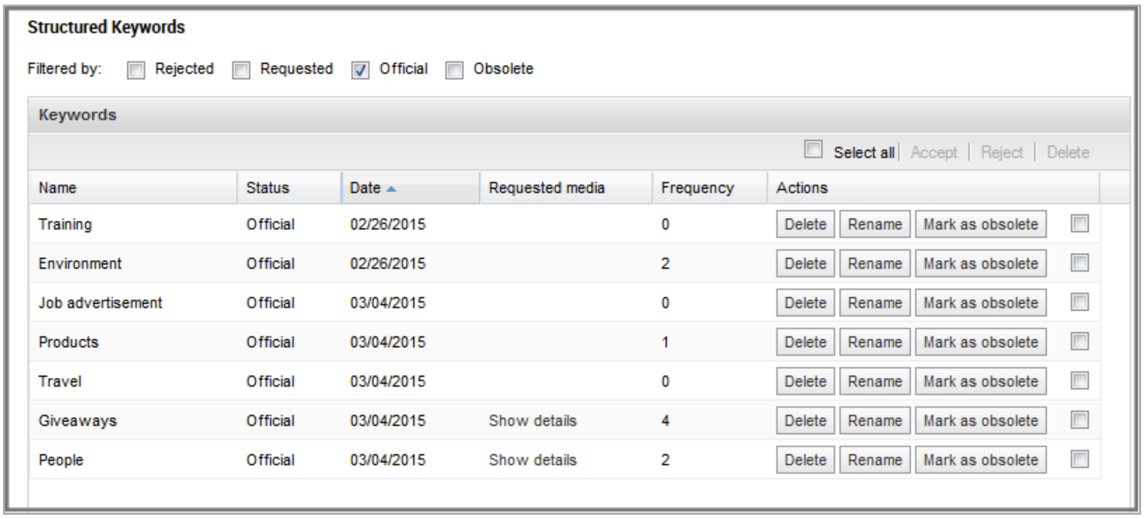
1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.
2. Choose *Several keywords* at the bottom of the overview.
3. Enter the keywords and press Enter after each keyword.
4. Click the *Save* button.

The keywords have been created and can be used immediately.

5.2.2 Overview of keywords

The overview in > *Configuration* > *Approvals* > *Keywords* displays a list of all requested, rejected, official (approved), and obsolete keywords.



Description of the overview columns

Column	Description
Name	This contains the keyword.
Status	This shows whether the keyword is rejected, requested, official (approved), or obsolete (deactivated).
Date	The time of the request
Request media	This opens the detailed view of the asset for which this keyword was requested.
Frequency	The frequency of use. Note that keywords that have been requested but are not approved yet can also be used.
Actions	Actions that are possible for this keyword. The actions available depend on the status of the keyword. Refer to the following table.

Actions

Status	Actions
Rejected	Approve, Delete
Requested	Approve, Reject
Official	Delete, rename, mark as obsolete
Obsolete	Delete, reactivate

5.2.3 Processing a keyword request

As administrator, you can manage keyword requests and approve or reject them.

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

2. Activate only the *Requested* checkbox under *Filtered by:*.

   Only the requested keywords are displayed.

3. You have the following options:
   - To process a request, choose *Accept* or *Reject* next to the desired keyword.
   - To process multiple keyword requests at the same time, activate the checkboxes to the right of the desired entries and choose *Accept* or *Reject* in the top bar in the overview.

5.2.4 Renaming a keyword

You can rename keywords at any time. The assignment of the keyword to assets does not change when you do so.

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

2. Set a filter for keywords with the status *Official*.
3. To change a keyword, choose *Rename* next to the desired keyword.
4. Make your desired changes.
5. Click the *Save* button.

The keyword is renamed.

5.2.5 Deactivating a keyword

You can set the status "obsolete" for a keyword, which then deactivates it. It can then no longer be assigned but can still be used as search criteria in the advanced search. It can also be reactivated at any time.

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.
2. Set a filter for keywords with the status *Official*.
3. To deactivate a keyword, choose *Mark as obsolete* next to the desired keyword.

The keyword is immediately provided with the status *Obsolete* and can no longer be assigned.

You can use the action *Reactivate* to reactivate the keyword and set its status as *Official*.

5.2.6 Deleting a keyword

> Attention
>
> You cannot undo the deletion of a keyword. Deleted keywords can no longer be used in the advanced search.

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.
2. You can set filters for keywords with the status *Rejected*, *Official*, or *Obsolete*.
3. You have the following options:
   - To delete a keyword, click the *Delete* button next to the desired keyword.
   - To delete multiple keywords at once, activate the checkbox to the right of the desired entries and click the *Delete* button in the top bar of the overview.

   A confirmation prompt opens.
4. Click *OK*.

The keyword is deleted.

5.2.7 Export and Import

5.2.7.1 Exporting keywords

You can export the existing keywords in the BrandMaker system and edit them locally. For example, you can export the keywords and add the system languages directly in the Excel list. When you import the list, the translated keywords and/or languages are created.

1. Choose > *Configuration* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

2. Activate the checkbox to the right of the entries that you want to export.
3. Choose *Export keywords*.

An XLS file has been created and saved on your computer.

5.2.7.2 Structure of the keyword export

When keywords are exported, the following information is written to the Excel file columns.

- The keyword ID, which is used to identify and assign the keyword during the import.
- The undefined language
- The edited languages for each keyword (Name_DE, Name_EN etc.)
- The current status of the keyword (rejected, requested, official or obsolete)
- The reason for rejection

> **Note**
>
> You can edit the status of a keyword using the Excel list. During the import, the status is changed automatically in the BrandMaker system.

5.2.7.3 Importing keywords

> **Note**
>
> The import of up to 10,000 keywords is supported. Larger quantities are possible in principle. In this case, however, performance during the import may be impaired.

1. Choose > *Configuration* > *Approvals* > *Keywords.*

   An overview of the keywords opens.

2. In the *Import* area, choose *Browse ...*, and select a file from your computer.
3. Choose *Import keywords*.

The keywords are identified and updated using the ID in the file. Keywords that do not have an ID are created as new keywords during the import.

5.3 Workflows

You can use a workflow to define the order and responsibilities for individual work steps clearly and describe the respective tasks and responsibilities. With the help of a workflow, you can create "project blueprints" and use them to standardize and map the individual phases and schedule of a project.

You create a new workflow in > *Administration* > *Data Structures & Workflows* > *Workflows*.

Prerequisites

You have the right MANAGE_WORKFLOWS.

The properties of a workflow

When you create a workflow, you define:

Name	Description
Workflow name*	Enter the name of the workflow.
Allow to copy this workflow for reuse	Enable the checkbox to use the workflow as a template. In the workflow overview, you can then copy the workflow.
Description	Store additional information about the workflow.
New approval is required when	Define the changes for which you want the workflow to start again. • *Never*, i.e. no new approval for changes in an asset or its meta data. • *Meta data changes*, i.e. when there are changes in the meta data of an asset or a document or template, the workflow must be restarted. • *Version changes*, i.e. when the asset being used is changed. • *All changes*, i.e. the workflow must be restarted and worked through again whenever there are changes. Note: This option is used in the Media Pool module only.

The properties of a workflow step

The following settings are configured for each created workflow step.

Name	Description
Name of work-flow step	Enter the name of the workflow step.
User group	Select the user group that you want to be responsible for the workflow step. A member of the user group can be selected as the processor. If you enter multiple user groups, a user from each user group must be selected when forwarding the object to this workflow step. To forward the object to the next workflow step, all of the entered users must complete this workflow step and forward the object. If one user returns the object to the previous workflow step, the entire workflow is reset to this step. Note: Please note:only one user group can be responsible for a workflow step in *Media Pool* and *Brand Template Builder* modules. If multiple user groups are entered, only the first user group will be used in *Media Pool* und *Brand Template Builder* modules.
Forcing a group assign-ment, forcing a user assign-ment, or permitting both while forwarding a job	Note: Effective only in the Job Manager. This option allows you to choose how a job is forwarded to the next step: • Force user assignment: When the job is forwarded, a user must be selec-ted as the assignee. • Force group assignment: A group is selected when forwarding the job. The job is then displayed for all the members of the group in the *Avail-able Jobs and Tasks* dashlet. Any member of the group can accept the job themselves or assign it to a different member. • Permit group assignment and user assignment: When forwarding the job, you can choose a user as the assignee directly or assign the job to the group so that any member can accept the job.
When approval is rejected in a step, all previ-ously granted approvals have to be repeated:	Enable the checkbox to define that already approved workflow steps must be repeated.

Name	Description
When approval is rejected, go back to workflow step	Define the workflow step you want to system to return to upon rejection. Note: Note: This option is used in the *Brand Template Builder* and *Media Pool* modules only.
When approval is rejected, user cannot change reject step	Enable the checkbox to define that repeating the specified step is mandatory if the workflow step is rejected. If you do not enable the checkbox, the user responsible for the step is free to select the step to which he should return on rejection. Note: Note: This option is used in the *Brand Template Builder* and *Media Pool* modules only.
The approver is allowed to download and edit the document	Enable the checkbox to allow the user responsible for the workflow step to download and edit the document. Note: Note: This option is used in the *Brand Template Builder* and *Media Pool* modules only.
Default duration in days (weekends and public holidays included)	Define the processing time (number of days) for the workflow step.
Estimated man power (weekends excluded)	If you want to document the estimated time required, enter the estimated time for processing the workflow step.
Remove this step	This deletes the workflow step.

> **Note**
>
> If a workflow step that is used is changed, all of the objects assigned to the workflow are reset to their creator. The creators of the objects are informed about this process by e-mail.

> **Note**
>
> Note that a workflow cannot be used simultaneously in the Media Pool, Job Manager, or Marketing Data Hub.

Using workflows in the Job Manager and Marketing Data Hub

Each job and data objetc is assigned to a workflow. A workflow consists of various workflow steps, and each workflow step is assigned to a user group. The user group members 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 a job or data object is created.

Using workflows in the Media Pool

Virtual databases (VDBs) can be flagged as requiring approval. To import or store an asset or a template in *Brand Template Builder* module in a VDB that requires approval, a predefined workflow must first be completed.

5.4 Price lists

You can use price lists to calculate the production costs for advertising material automatically. You can download a template for a price list in Excel format to enter the required information correctly. The following information is uploaded from the uploaded price list:

- *Name of price list*: Enter the name with which the price list is displayed.
- *Currency*: Enter the currency for the costs.
- *Limit* and *Price*: Enter a sequence of numbers to display different prices based on the quantity.

The overview of existing price lists provides information about:

Name	Description
Name of price list	The displayed name is uploaded from the uploaded Excel file.
Creator	This displays the user that uploaded the price list.
Updated by	This displays the user that uploaded a changed price list.
Created	This displays the date on which the price list was first uploaded.
Updated	This displays the date on which the price list was last changed or uploaded.
Currency	The displayed currency is uploaded from the uploaded Excel file.

Note

If you want to link custom advertising material to shop items, all the prices must be provided as net prices in the price list. In addition, the currency in the price list must match the currency defined for the supplier.

Fusion

6

This chapter summarizes topics related to the integration of the BrandMaker system with other systems.

- *Single Sign-On/SAML* on the facing page
- *Keycloak authentication* on page 106
- *Registered applications* on page 107
- *MBI — Message Based Integration Service* on page 110
- *UX Logic* on page 111

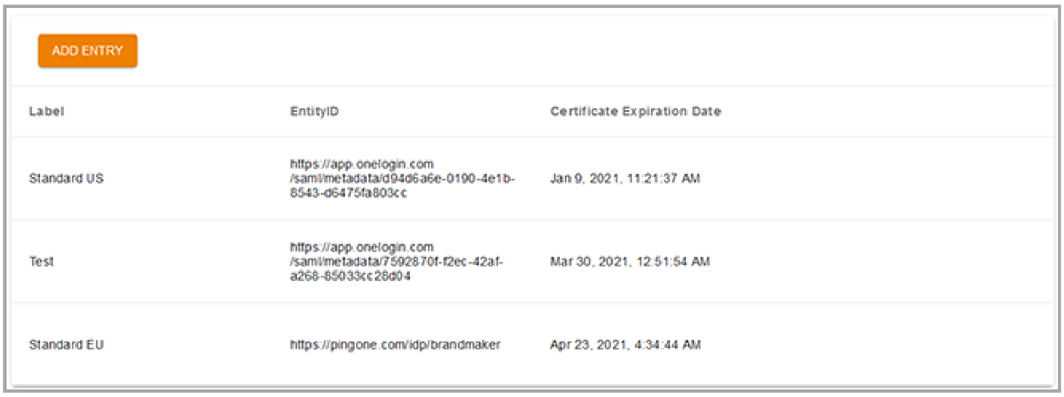
6.1 Single Sign-On/SAML

On the > *Administration* > *Fusion* > *Single Sign-On / SAML* page, you configure the BrandMaker system as a service provider for logging on using SSO via SAML. You can create configurations for logging on using multiple identity providers.

Create new configuration

1. Choose > *Administration* > *Fusion* > *Single Sign-On / SAML*.

   If a configuration has not been created, you are guided directly to the fields to be edited. If at least one configuration exists, the following page is displayed:

2. Click *Create*.
3. The fields to be edited are displayed on the SAML Settings tab:

4. Fill in the fields by uploading the XML file for the IdP metadata or change the required parameters manually:

   Note:The settings that you must edit are determined by the setting of your identity provider.

- *Configuration name (entityID):* Enter the entity ID of your identity provider. An entity ID is the globally unique name for an SAML identity provider. This is usually the identity provider URL.
- Name: Enter a name for the new configuration.
- *Identity provider (IdP) endpoint*
  Enter the full URL that your identity provider uses to receive SSO messages.
- *IdP certificate (X509)*
  Enter the public key certificate of your identity provider (X.509) in PEM format.
- *Protocol version*
  Select the SAML protocol version that is used between BrandMaker (SP) and your identity provider: SAML 1.x or SAML 2.0. SAML 2.0 is recommended.
- *Binding type*
  Select the transport type used between BrandMaker (SP) and your identity provider: POST or REDIRECT. REDIRECT corresponds to HTTP-GET.
- *Signature support*
  Messages can be signed for security (to establish trust).
  Choose whether signature support between BrandMaker (SP) and your identity provider is activated.
- *Service provider (SP) certificate key size*
  Define the key size for the service provider certificate.
- *SP certificate validity in days*
  Define the validity period for the service provider certificate in days.
- *NameID format*
  Select the NameID format. Your SAML identity provider must declare the format in its metadata.
- System settings
  Activate the Update SSO service URL checkbox if you want to avoid the manual entry in the system settings. If you activate the checkbox, the system setting is automatically updated with the data from the configuration. Note that the data of the last saved configuration is always entered in the setting.

5. Optional: If you need a mapping of your attributes to the SAML attributes of the Marketing Efficiency Cloud:

   a. Go to the *Attribute Mapping* tab.
   b. Select the required SAML attribute of the Marketing Efficiency Cloud from the drop-down list by activating the checkboxes.
   c. Click a point outside the picklist to close it.
   d. All selected attributes are displayed in the dialog.
   e. For each attribute, enter the name of the appropriate parameter in your system.
6. Click *Save*.

BrandMaker is configured as a service provider for SSO via SAML.

> Note
>
> If the IdP configuration changes, you may have to adjust the SAML configuration for BrandMaker.

6.2 Keycloak authentication

The internal authentication method has been switched system-wide from Basic Authentication over to the OAuth2 standard completely.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).

Authentication calls are now system-wide changed to Keycloak, as the previous method is no longer being used.

This transition includes the following functions:

- direct login
- SAML login
- Autologin
- Requesting the login data for a new user

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

6.3 Registered applications

The oAuth2 standard is used for secure authentication of third-party applications on a BrandMaker instance. For implementation details, see the corresponding page in the BrandMaker Developer Portal. You register a third-party application under > *Administration > Fusion > Registered applications*.

> Note
>
> Note that the *Register application* on the next page section describes only the first part of the registration process. See the complete description under BrandMaker Developer Portal.

You will need the following information to register:

- Unique name: Enter the name of the use. Among all registered applications, the name must be unique.
- Client URI: Enter the URI of the third-party application. This is the base address of your application that wants to access the BrandMaker system, e.g. "https://www.meinservice.com".
- Owner: Specify the owner. The owner does not have to be a user in the BrandMaker system. The entry is for information purposes only and is used here for display.
- Redirect URI: Specify a redirect URI. If necessary, you can specify several redirect URIs. The redirect URI points to the oAuth2 client in the application that wants to log in to the BrandMaker system, e.g. "https://www.meinservice.com/tokenexchang.do".
- If you want to visually represent the third-party application by a logo, you need a URI of the logo. The URL must point directly to an SVG, PNG or JPG image. Ideally, this image should be square and no larger than 400x400 pixels.

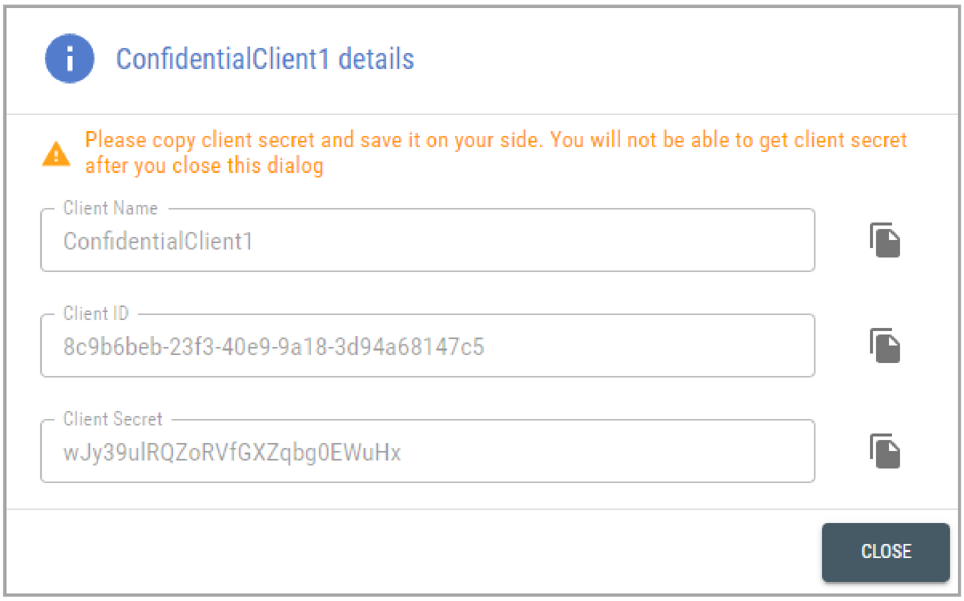
Associated tasks

- *Register application* on the next page
- *View the registration data* on page 109
- *Delete registration* on page 109

6.3.1 Register application

1. Click > *Administration* > *Fusion* > *Registered applications*.
2. Click *Register application*.

   The *Register application* dialog box is displayed.
3. Edit the mandatory fields.
4. Optional: Specify a logo URI.
5. Click *Register*.
6. You have registered the application. The following dialog box is displayed:

7. Back up the data especially the Client Secret: Click to copy the data to the clipboard and save it in another safe place.

   Attention!

   The Client Secret is only displayed at this time and in this dialog box and cannot be retrieved again. If you close the dialog box without saving the Client Secret, you will not be able to complete the registration.
8. Click *Close*.

You have completed the first part of the registration. Continue as described under BrandMaker Developer Portal.

6.3.2 View the registration data

1. Click > *Administration* > *Fusion* > *Registered application*.
2. Place the cursor on the registration in the list, whose data you want to view.

   The eye icon is displayed.
3. Click on the eye icon.

   The *[Application name]* dialog box is displayed.
4. If you want to copy a date, click the icon at the end of the respective line.
5. Copy the date to the required position.
6. Repeat steps 4 and 5 if necessary.
7. Click *Close*.

You have viewed the registration data and copied the data if required.

6.3.3 Delete registration

1. Click > *Administration* > *Fusion* > *Registered application*.
2. Place the cursor on the registration you want to delete in the list.

   The recycle bin icon is displayed.
3. Click on the recycle bin icon.

   A confirmation prompt is displayed.
4. Click *Confirm*.

You have deleted the registration.

6.4 MBI — Message Based Integration Service

You can access the configuration page via > *Administration* > *Fusion* > *Backbone / MBI.* To be able to see the menu item, the administrator must have the right MANAGE_FUSION_APPS.

On the *Backbone / MBI* page, you can register MBI consumers to synchronize data from the system with one of your existing âppliccations by using the REST API. Initially, only Job Manager will be supported, with other modules to follow later.

The accompanying documentation can be found in our Developer Portal under this link and as individual PDF manuals in German and English.

6.5 UX Logic

This function makes it possible to import web components into the BrandMaker system and call them up at various points, so-called slots, in the modules. This allows, for example, data from third party systems to be displayed in the BrandMaker system. This enables the following solutions:

- Representing information from third-party applications and displaying it, e.g., by querying external databases
- The inclusion of own customized input elements or calculation functions, i.e. results can be written back using functions provided by the page slots.
- The visualization of existing information in a customized component, e.g. with the help of diagrams

Under *> Administration > Fusion > UX Logic > Management > Web Component Administration*, you import web components and manage their use in the system.Under *> Administration > Fusion > UX Logic > Usage*, the administrator defines the use of the components. You have access to these pages if the MANAGE_FUSION_APPS permission is assigned to your role.

For correct programming, management and use of web components, follow the Developer documentation.

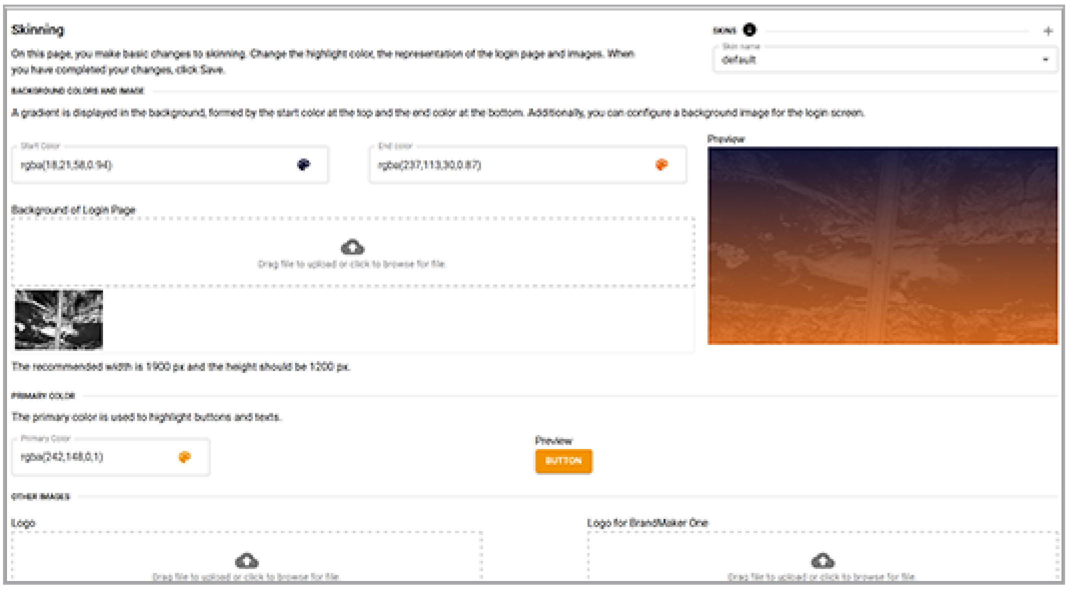
This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

7

Look & Feel

7.1 Desktop Skinning

On the > *Administration* > *Look & Feel* > *Desktop Skinning* page, you change the appearance for the display in the browser, such as logos and colors. When you have made changes, click *Save* at the bottom right of the page. When you save, the page is automatically reloaded so that your changes are immediately visible.
If you want to reset the settings to the default, click *Reset to default* at the bottom of the page on the left.



Background colors and image

You can set the application background color and a background image for the login page.

- Application background color: You can set two colors, a start color and an end color. The application background will show a gradient from the start color at the top to the end color at the bottom. Click the palette icon to open the color picker. Note that you should specify the alpha value smaller than 100% for both colors if a background image is used, otherwise the colors will completely cover the image.
- Background image on the login page: Upload an image to be shown as background image on the login page. The recommended width is 1900 px, the height is 1200 px. Please make sure that the text displayed on the login page remains legible, for example, by converting it to a grayscale image beforehand or darkening or lightening it.

Primary color

The primary color is used to highlight buttons and texts. Click the palette icon to open the color picker. Note that you cannot set transparency for the primary color.

Other images

Additionally you can upload images for the following uses:

- Logo: Change the logo that will be displayed in the header of the application. The file must be a transparent PNG or SVG. The height must be at least 50 px. The maximum width is 150 px; for wider logos, the image will be adjusted, i.e. the height will be reduced to show the logo in full.
- Logo for BrandMaker One:
  Note: Please observe that the function is created in Administration, but not yet connected to the BrandMaker One app. This will be added in an upcoming version.
  Change the logo in the BrandMaker One mobile app. The recommended width is 812 px and the height should be 456 px.
- Header graphic in PDF files: Change the graphic in the header of PDF files. The recommended width is 1559 px and the height should correspond to 467 px. The file must be available in PNG format.
- Favicon: Change the Fav icon. The Fav icon must be 16 x 16 pixels and must be in ICO format. Choose *Browse...* to select a file.

More skins

If your company has several brands, you can create a skin for each brand. In order for a user to see the application in the look and feel of the brand, the application must be called up once in the user's account accordingly: When calling up the application, *?skin=skinname* must be appended to the application address, for example *www.systemname.brandmaker.com?skin=skinname*. To see the application in the normal appearance again, *?skin=default* must be specified. The skin default is always available.

You create another skin as follows:

1. Click on > *Administration* > *Look & Feel* > *Skinning* the plus sign in the upper right corner.

   The *Skin Form* dialog box opens.

2. Enter a skin name.

3. Click *Save*.

   The dialog box closes. The page displays the default settings for skins.

4. Adjust the skinning settings.
5. Click *Save* at the bottom of the page on the right side.

You have created another skin. You can switch between multiple skins using the dropdown list at the top right.

If you want to delete a skin, select the skin and click *Delete* at the bottom of the page. Note that you cannot delete the skin *Default*.

Test systems

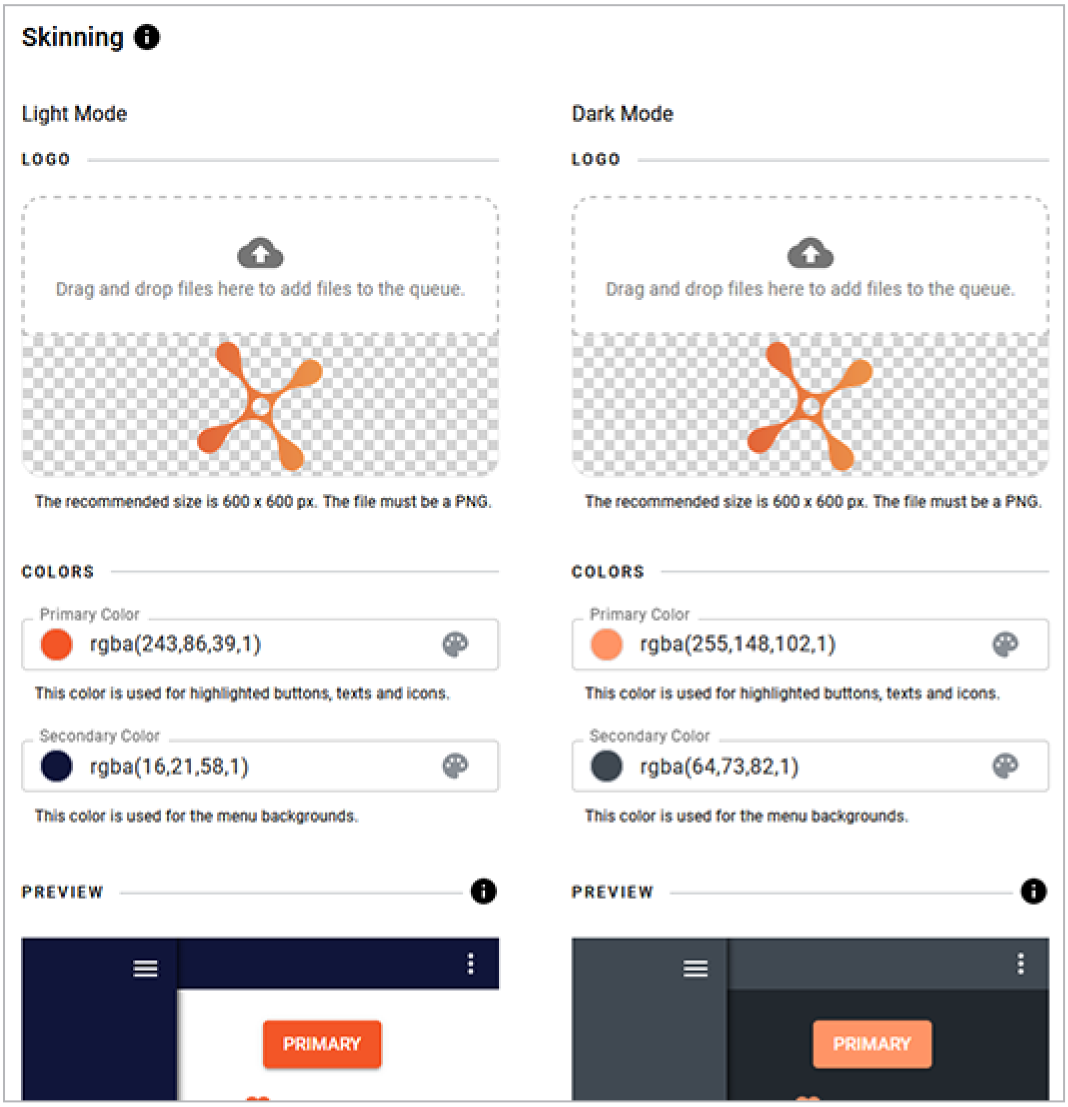
You can make it recognizable for the user whether the user is in a test or a productive system. To do this, download the files for the required languages in the test system under *> Administration > Look & Feel > UI Languages*. In each language file, enter the name for the test system in the *system.test-system.name* key, e.g. *test environment*. Then upload the language files with the entry again. The name is then displayed as a red label on the login page and in the system header.

7.2 Mobile App: Skinning and Intro Pages

There is a separate main menu item in the administration tree menu: *Mobile App*, which provides the configuration for the app. Under > *Administration* > *Mobile App* > *Skinning*, you can make basic changes regarding the appearance of the BrandMaker mobile App. You can upload a logo for both a light and a dark representation of the app, and set primary and secondary colors. The primary color is used for highlighted buttons, texts and icons, the secondary color for the menu background.

Preview how your settings will look on a mobile screen, showing buttons, text, states, and your logo. Make sure all elements have good contrast for a better readability.

When you have completed all changes, scroll down to the bottom of the page and press*Save* to commit.



Intro-Seiten

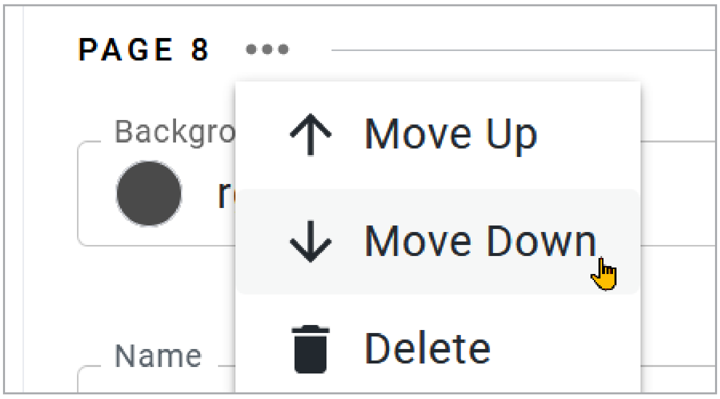
Along with the current App version, you can set up one or more pages to be displayed in the App after login. The intro pages configured here can be used as welcome page(s) so that users do not land in the actual application immediately after logging in.

As administrator, this allows you to give new users an introduction to the App after they have logged in. Short introductory movies in the form of animated GIF or animated SVG are supported as well. You can create multiple pages that will be played in the specified order after the app has been launched.

1. Navigate to > *Administration* > *Mobile App* > *Intro Pages*.

   The still empty configuration page is loaded.
2. Using the *+ Add Page* button you create a new page and can enrich it with content.
3. On the left, specify the background color, the descriptions to be displayed, button texts and add an image in the recommended size and a supported format. The buttons allow users to leave the intro before it ends and go to the main screen.

   On the right side you will see a page preview of the layout with your text, your image and the preferred button below it.
4. Optional: Use the context menu ... following the page number to delete a page or to move it up or down in the sequence.

5. Continue with Step 2 for another page. When you have completed editing the Intro Pages, scroll down to the bottom of the page and pressSave to commit.

Testing the App customizations

Before you release the app to users, you should test the customizations of the skinning and intro pages on an end device to see if they are suitable or need adjustments. The pages can be scrolled forward or backward with a swipe gesture to the left or right. If there is no button text at all, however, this does not mean that you have to look at all the pages.

> **Note**
> The intro pages can be dismissed early at any time when testing the app by swiping down the screen contents.

1. Log in to the App using your credentials from the desktop application.
2. Test the appearance and the intro pages.

   This takes you to the main screen.

3. Log out from the App under > ≡ > *Settings* > *Logout*.

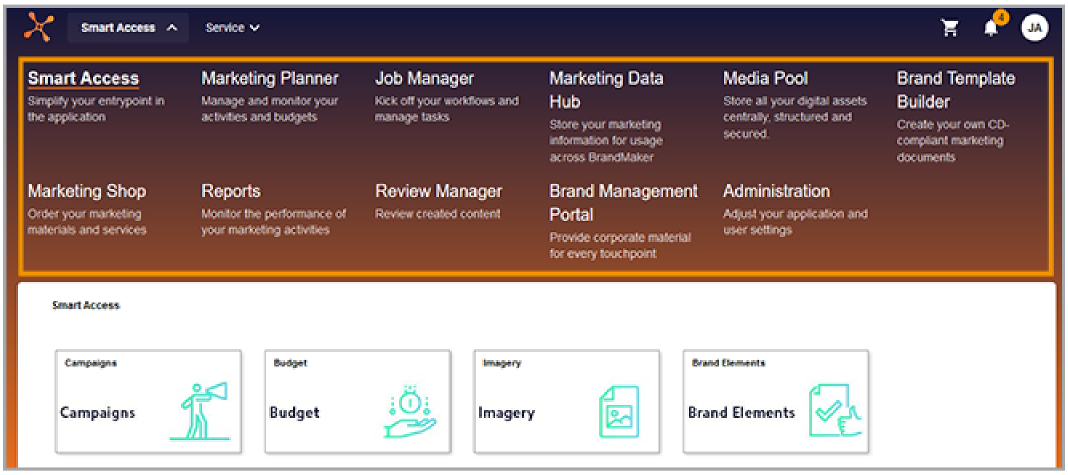
4. If needed, make additional adjustments in the administration area under *Administration* > *Mobile App* > *Skinning*.

5. Log in to the App again to test the changes you made in step 4.

Once you have customized the App and are satisfied with the result, you can then release it to all App users.

7.3 Navigation

Users can use the module navigation to switch between the modules approved for them at any time. The module navigation is located in the system header on the left:



You can adjust the module navigation in the following ways:

- *Changing the order* below
- *Changing the display of modules in the navigation bar* on the facing page
- *Selecting a global default module* on page 122 that is displayed after logging into the system
- *Adding customer-specific links* on page 123 that can be used to navigate to third-party modules or other websites

Carry out the changes under > *Administration* > *Look & Feel* > *Navigation*.

Note

Note that you can also change the names of modules in the navigation. You define the module names for the whole application and for different languages under > *Administration* > *Look & Feel* > *Application and Module Names*.

7.3.1 Changing the order

Prerequisites

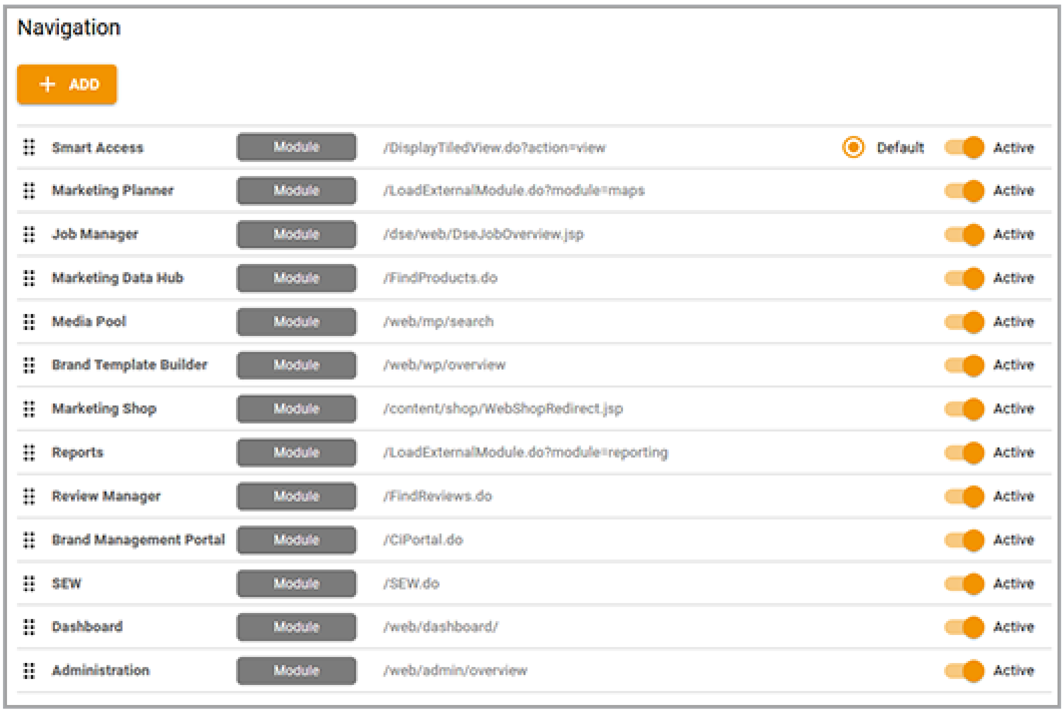
You have the right MANAGE_MODULE_NAVIGATION.

Changing the order

> **Attention**
>
> Please note that your changes take effect immediately for all users!

1. Choose > *Administration* > *Look & Feel* > *Navigation*.

   The following interface is displayed:

2. You can change the order of the modules by moving an entry to the desired position in the list using drag and drop. To do so, click the drag point for a module in the first column.

You have changed the order. You may also have to refresh your screen to view the change.

7.3.2 Changing the display of modules in the navigation bar

It may be helpful to hide some modules in the module navigation. For example, this is the case when a module is accessed only via other modules (e.g. when you want the *Media Pool* to be reached only via *Smart Access* or *Brand Template Builder* to be reached only via the *Marketing Shop*).

Prerequisites

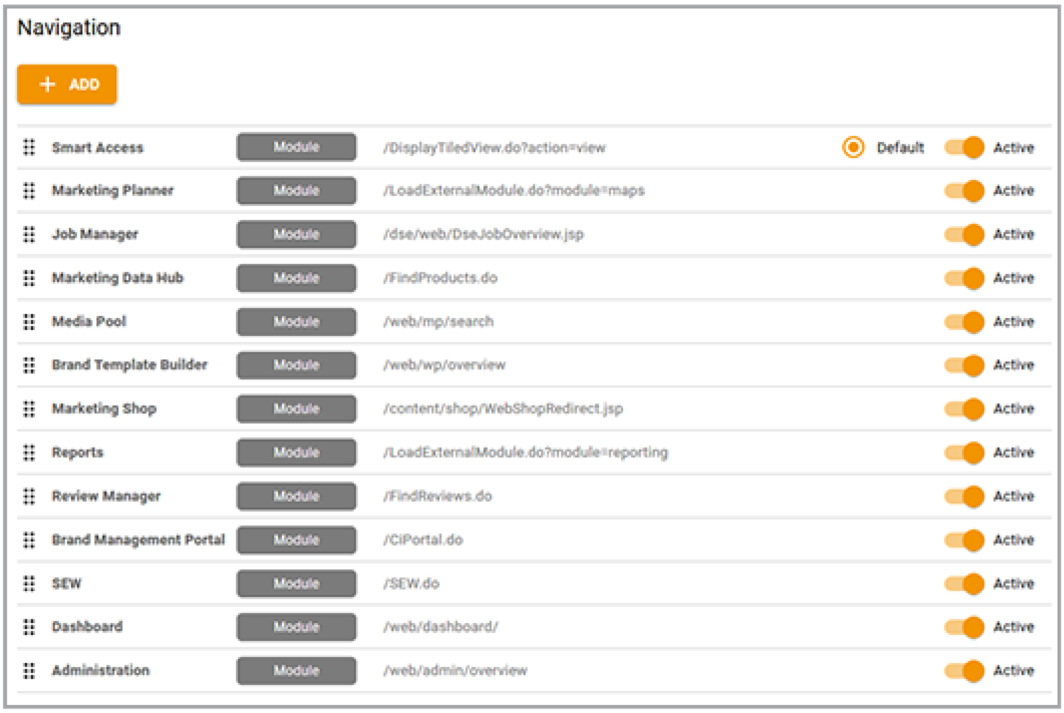
You have the right MANAGE_MODULE_NAVIGATION.

Changing the display

> Attention
>
> Please note that your changes take effect immediately for all users!

1. Choose > *Administration* > *Look & Feel* > *Navigation*.

   The following interface is displayed:

2. You can change the display by clicking the switch in the last column in the module line:
   - Orange switch: The module can be accessed in the module navigation.
   - Gray switch:The module is not displayed in the module navigation.

You have changed the display. You may also have to refresh your screen to view the change.

7.3.3 Selecting a global default module

The global default module is the module that is displayed for all users after they first log in. You can determine the current global default module by the *Default* entry in the second column from the right.
This setting applies to all users. A user can configure a custom default module under > *Your user name* > *Settings* > *General Settings* area > *Start module*.

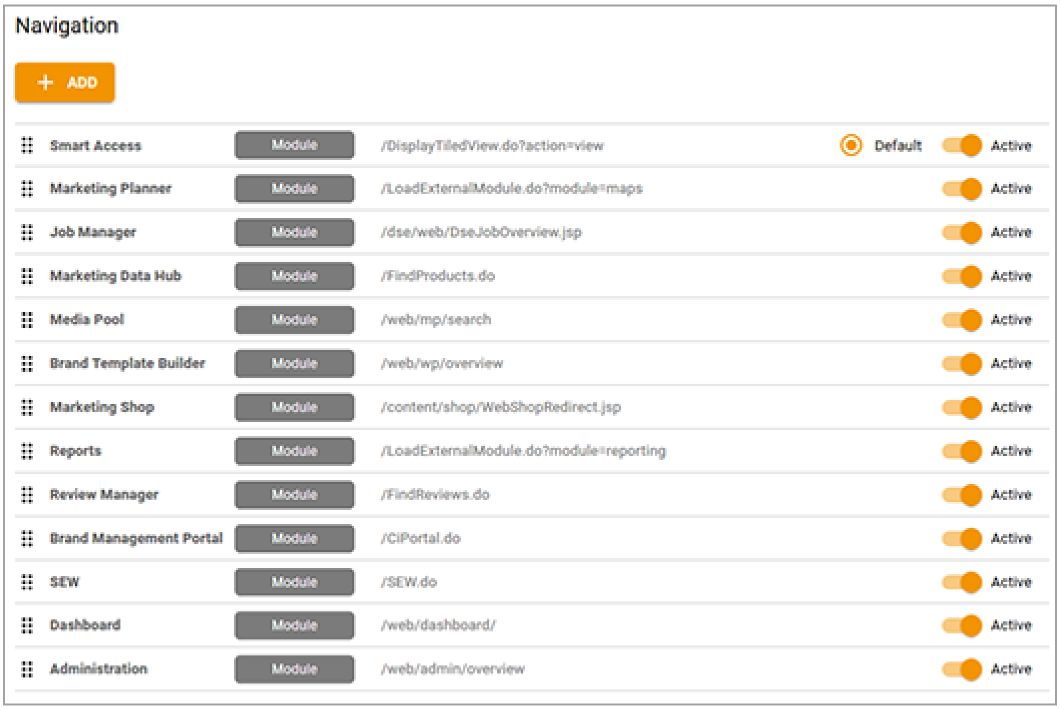
Prerequisites

You have the right MANAGE_MODULE_NAVIGATION.

Selecting a global default module

1. Choose > *Administration* > *Look & Feel* > *Navigation*.

   The following interface is displayed:

2. Move the cursor to the second column from the right (next to the activation switch) for the module that you want to make the global default module.

   A gray default entry is displayed.

3. Click the gray default entry.

You have defined the module as the default module. The entry *Default* is displayed in orange and is now displayed only for this module.

7.3.4 Adding customer-specific links

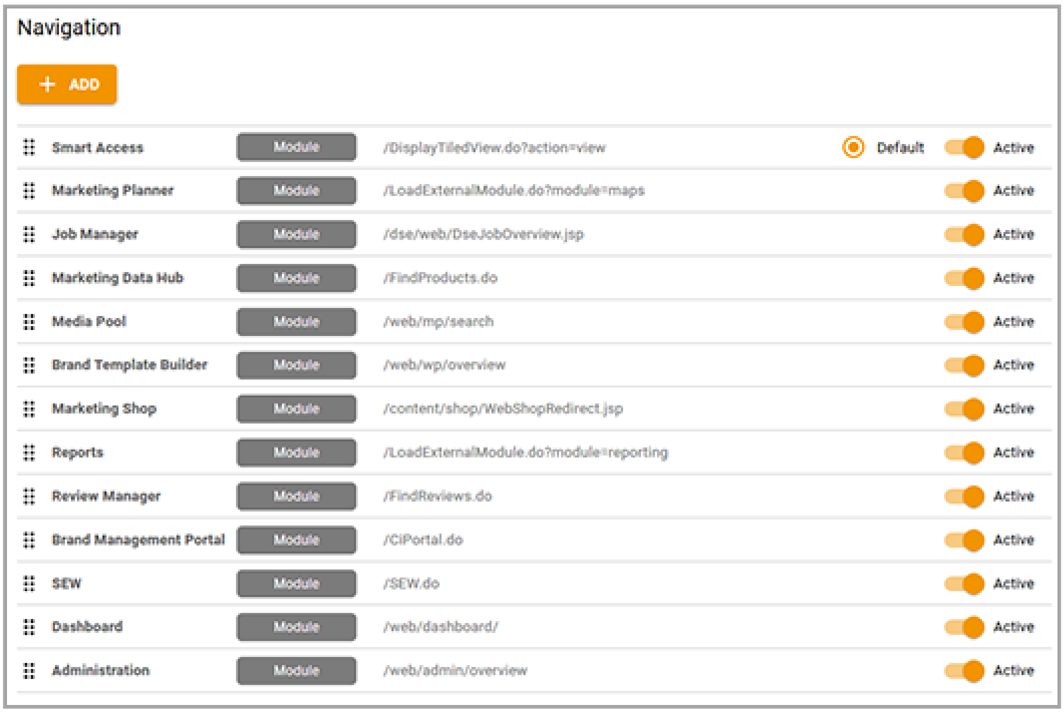
Prerequisites

- You have the right MANAGE_MODULE_NAVIGATION.
- You know the full URL of the object that you want to link.

Adding customer-specific links

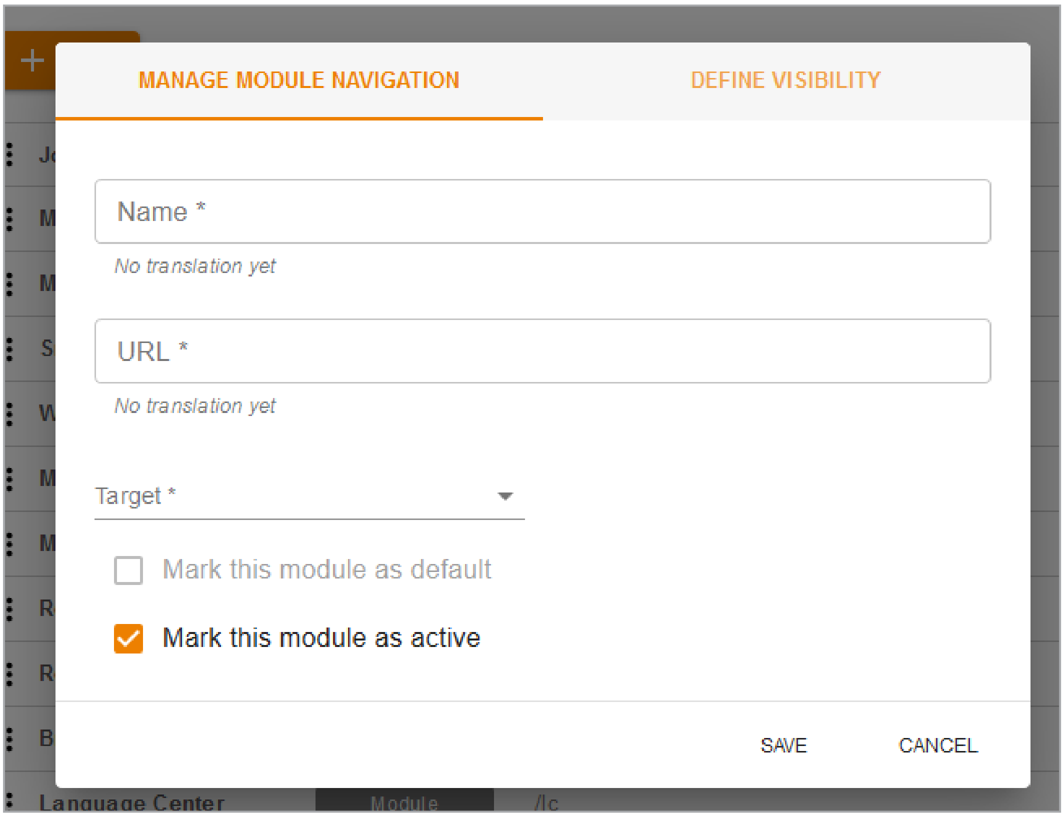
1. Choose > *Administration* > *Look & Feel* > *Navigation*.

   The following interface is displayed:



2. Choose *Add*.

   The following dialog box is displayed:



3. Edit the fields. Fields marked with * are mandatory.

   Navigation tab:

   - *Name*: Enter the name of the link. Click *Edit all languages* to add translations.
   - *URL**: Enter the full URL of the link (for example, *http://www.brandmaker.com/de.html*).
   - *Description*: Enter a short description. The description will be displayed in the top navigation under the name. Therefore we recommend a length of approx. 50 characters.
   - *Target**: Select *Whole window* if you want to display the target on the current browser tab, filling the whole screen area. Select *New window* if you want to display the target on a new tab or in a new window (depending on the browser settings). If you select *Embedded*, the target is embedded on the current tab below the module navigation.
   - *Mark this module as default*: Activate this checkbox if you want to define the link destination as the global default module.
   - *Mark this module as active*: Activate this checkbox if you want to display the link in the module navigation.

Define visibility tab:
Do not make any changes if you want all users to view the link. If you want only specific users to view the link, you can do so based on the existing BrandMaker modules and the roles they provide: In the list on the left, select a BrandMaker module and then select an appropriate role in the selection list on the right. Now choose *Apply*. The combination of the module and role is then displayed below the area. Repeat the process until all of the required roles are entered. Note that a user only has to be assigned to one of the selected roles in order to view the link.

4. Click *Save*.

You have added a link that is displayed in the list either for all the modules or for specific roles. If the link is visible in the module navigation, the user accesses the linked third-party module or website by clicking the link.

7.4 Interface text management

You can modify the texts in the user interface of the application, add your customer-specific languages, and change the names of the application and modules.

Default languages

The BrandMaker system includes interface texts in 12 default languages. You are free to decide which of the default languages you use in the system. For more information, see *Manage default languages* below.

Interface texts

BrandMaker provides a specific wording. If you want to make changes texts, for example to implement your company's terminology, you can do so for each of the 12 default languages. For more information see *Interface texts* on page 129.

Customer-specific languages

In addition to the 12 default languages, you can add up to 13 customer-specific languages. Please note that you must have the interface texts translated into the respective customer-specific language yourself. Please also note that the system only supports the depiction of so-called left-to-right languages, for example Latin or Cyrillic fonts. Asian fonts are also displayed left-to-right. You can create right-to-left, customer-specific languages, but the system displays will display them left-to-right. For more information, see *Customer-specific languages* on page 135.

Application and module names

You also have the opportunity to make changes to the names of applications and modules. The changed names are then used consistently in different locations in the system. For more information, see *Application and module names* on page 144.

7.4.1 Manage default languages

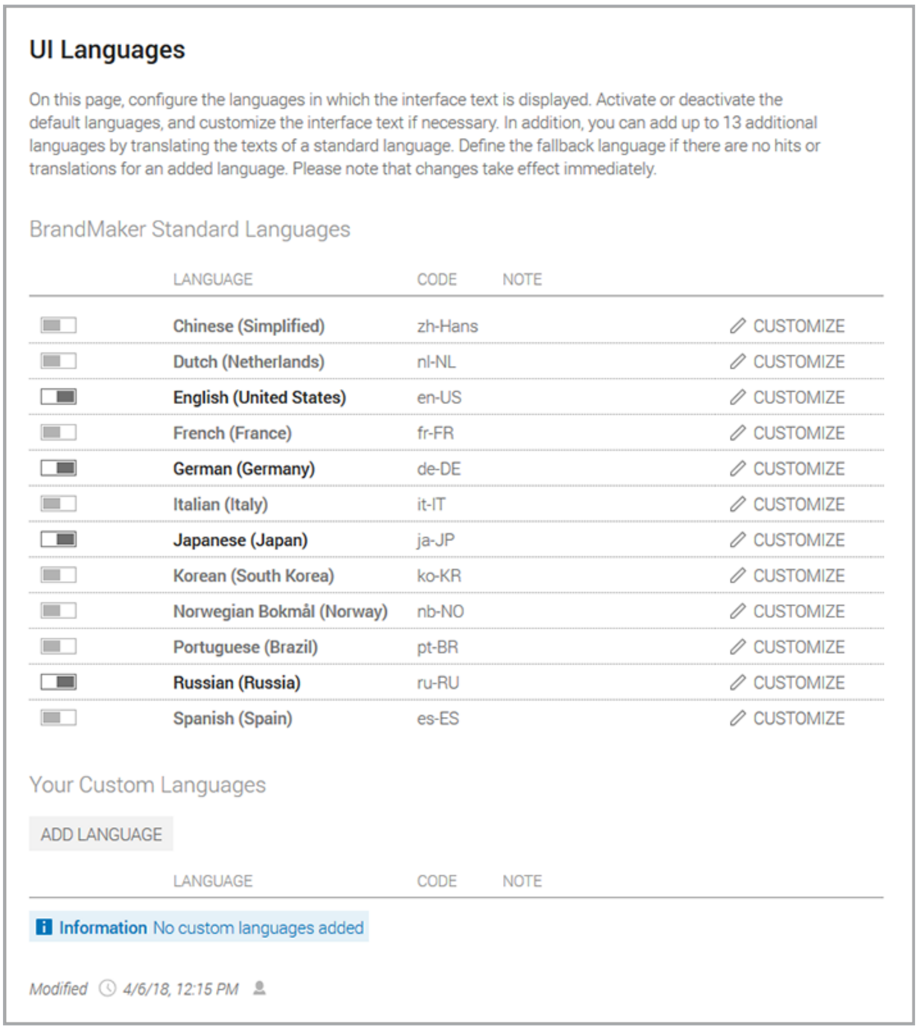
The BrandMaker system includes interface texts in 12 default languages:

- Chinese (Simplified)
- German (Germany)
- English (United States)
- French (France)

- Italian (Italy)
- Japanese (Japan)
- Korean (South Korea)
- Dutch (Netherlands)
- Norwegian Bokmål (Norway)
- Portuguese (Brazilian)
- Russian (Russia)
- Spanish (Spain)

You are free to decide which of the default languages you use in the system.

You can manage the default languages under *> Administration > Look & Feel > Interface Languages:*



The topmost table shows the 12 default languages. In the first column, decide with the switch whether the language will be used in your system:

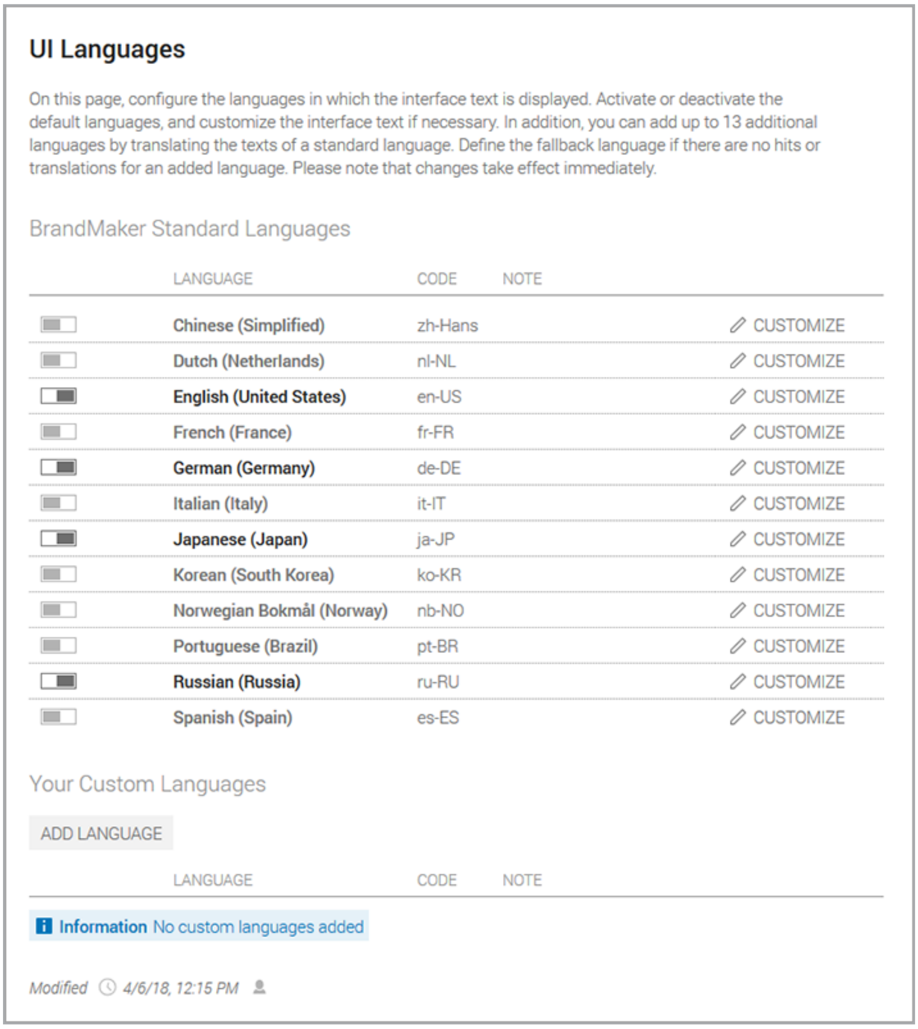
- : The language is deactivated.
- : The language is activated.

For example, the user can choose from the activated languages on the login page or under > *User name* > *Settings* > *"General Settings" area* > *Language*.

You can define the default language of your system under > *Administration* > *System Configuration* > *System Settings* in the setting *Language Default User Interface*.

7.4.2 Interface texts

BrandMaker provides a specific wording. If you want to make changes to texts, for example to implement your company's terminology, you can do so for each of the 12 default languages. You can adjust a language under > *Administration* > *Look & Feel* > *Interface Languages*:



How it works

You have the option of downloading and adapting the original interface texts and re-uploading the file with the modified texts. When downloading, the interface texts are saved in an Excel file with the XLSX format. In the Excel file, the columns A and B are filled on the first sheet. Column A contains the keys used to assign the texts to the right locations in the interface.

> Attention
>
> Do not modify the keys in column A! If the keys are incorrect or missing, the system can no longer assign the respective text correctly!

The corresponding text is entered in column B. You can make changes to this text. However, please heed the following features when doing so:

- *Tags*: The interface texts contain tags, for example <br/>, <a>, or <i>.
- *Variables*: Further variables are also entered in the form {x} or [%Description%].

> Attention
>
> Leave the tags and variables unchanged and do not add any tags or variables, as this changes the meaning and layout of the text.

Once you have adapted the texts according to your wishes, save the Excel file and upload the file. The system checks which texts have been changed and saves the changes. These changes take effect immediately.

If you want to make further changes, download the previously uploaded file, as it only contains the changed texts. You can supplement these with additional, modified interface texts. Please note *Adjusting other interface texts* on page 133. If you want to reset the changes, delete the file with the changes. The system will then use the original texts again. For more information, see *Resetting changes* on page 134.

During a system update

If your system is updated to a new version, please note the following cases for interface texts:

- *Interface texts are omitted*: If texts are no longer required, the corresponding entries in the Excel files are omitted. You do not need to do anything.

- *Interface texts are added*: If new texts are required, they are added to the original interface texts. If necessary, you can adapt the new texts as described in *Adjusting other interface texts* on page 133 and add them to existing changes.
- *Existing interface texts change, but you haven't changed these interface texts in your system*: In this case, too, there is no need for you to act; the changes will be automatically displayed in your system.
- *Existing interface texts change and you had already changed these interface texts in your system*: In this case the changes are saved in the original interface texts, but your changed texts are still used. Check your changes to determine whether you need to make any adjustments.

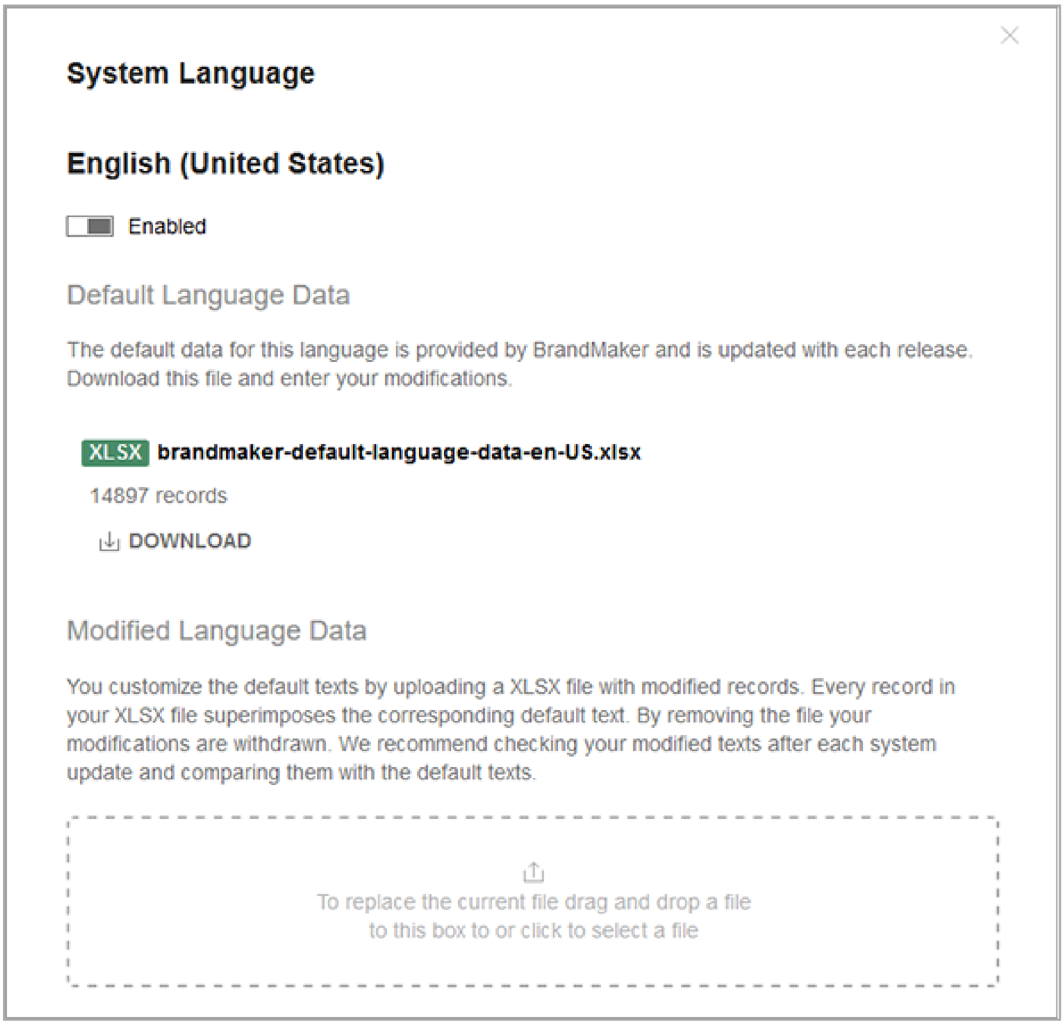
Associated Tasks

- *Adjusting interface texts* below
- *Adjusting other interface texts* on page 133
- *Resetting changes* on page 134

7.4.2.1 Adjusting interface texts

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. Click the Customize button in the line of the default language to be adjusted.

   A dialog box will open on the right side.



3. Click *Download* to download the interface texts.
4. Save and open the Excel file.
5. Search for the texts you want to adjust and change the texts accordingly.
6. Save and close the Excel file with your changes.
7. Switch back to the system. If you have closed the Customize dialog box, open it again by clicking on *Customize* in the line of the default language.
8. Upload the adjusted Excel file:
    - Drag and drop the file to the bottom area of the dialog box.

      OR
    - Click on the bottom area and select the Excel file.

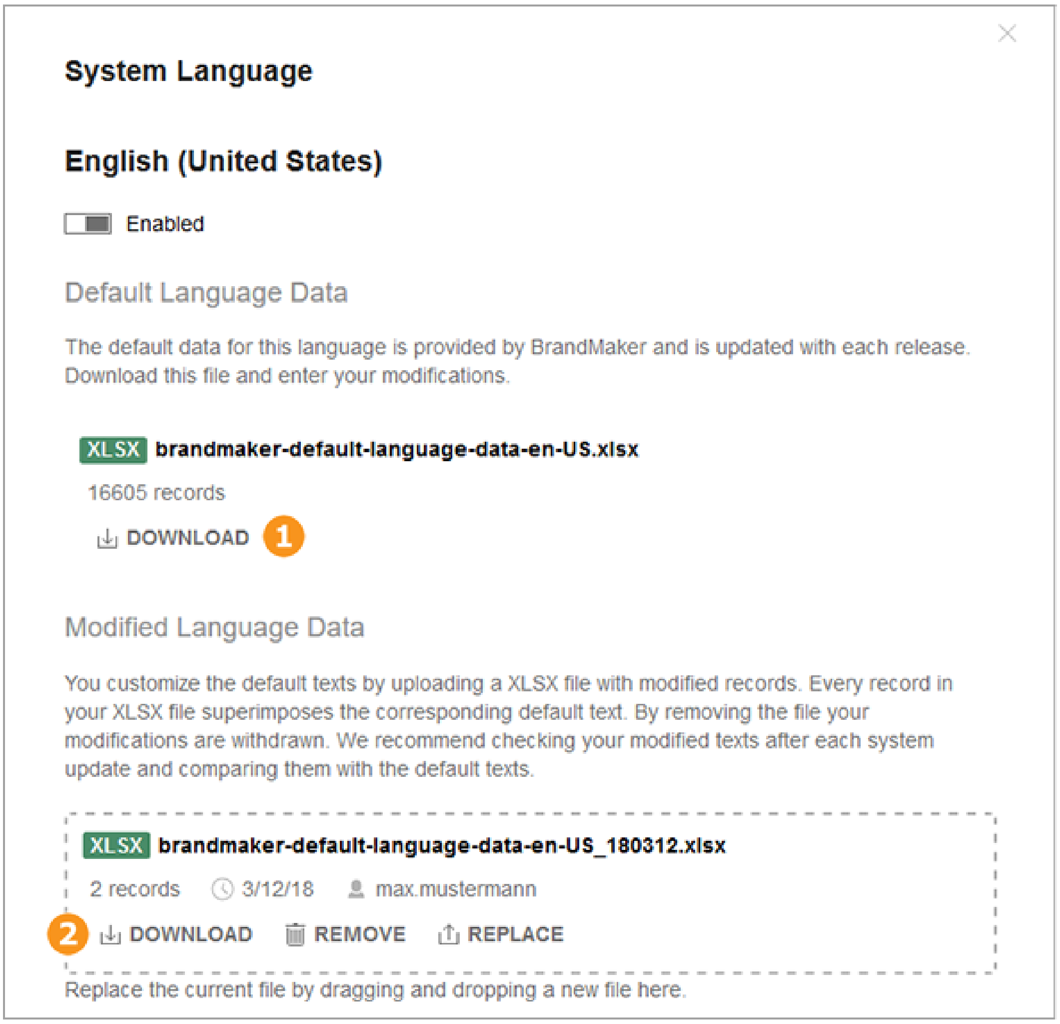
      The file is uploaded.
9. Close the dialog by clicking the *X* in the top right.

The modified texts are immediately effective and visible with the next update of your browser. The number of texts that were changed is displayed under > *Administration > Look & Feel > Interface Languages* in the default languages table for the respective language.

7.4.2.2 Adjusting other interface texts

1. Switch to the > *Administration > Look & Feel > Interface Languages* page.
2. Click the *Customize* button in the line of the default language to be adjusted.

   A dialog box will open on the right side.

3. Click *Download* in the upper area of the screen 1.

   You will download the original interface texts.
4. Save the Excel file.
5. Click *Download* in the bottom area of the screen 2.

   You will download a file that only contains modified interface texts.

6. Save the Excel file.
7. Open both Excel files.
8. Search in the original interface texts for the entries you want to adjust and change the texts accordingly.
9. Transfer the modified lines completely to the second file, which only contains the previous changes. Please note that you have to transfer the content from column A (Key) and column B (Text).
10. Save and close the Excel file with the transferred changes.
11. Switch back to the system. If you have closed the Customize dialog box, open it again by clicking on *Customize* in the line of the default language.
12. Upload the Excel file with the transferred changes:
    - Drag and drop the file to the bottom area of the dialog box (2).

      OR
    - Click *Replace* in the bottom area and select the Excel file.

      The file is uploaded.
13. Close the dialog by clicking the *X* in the top right.

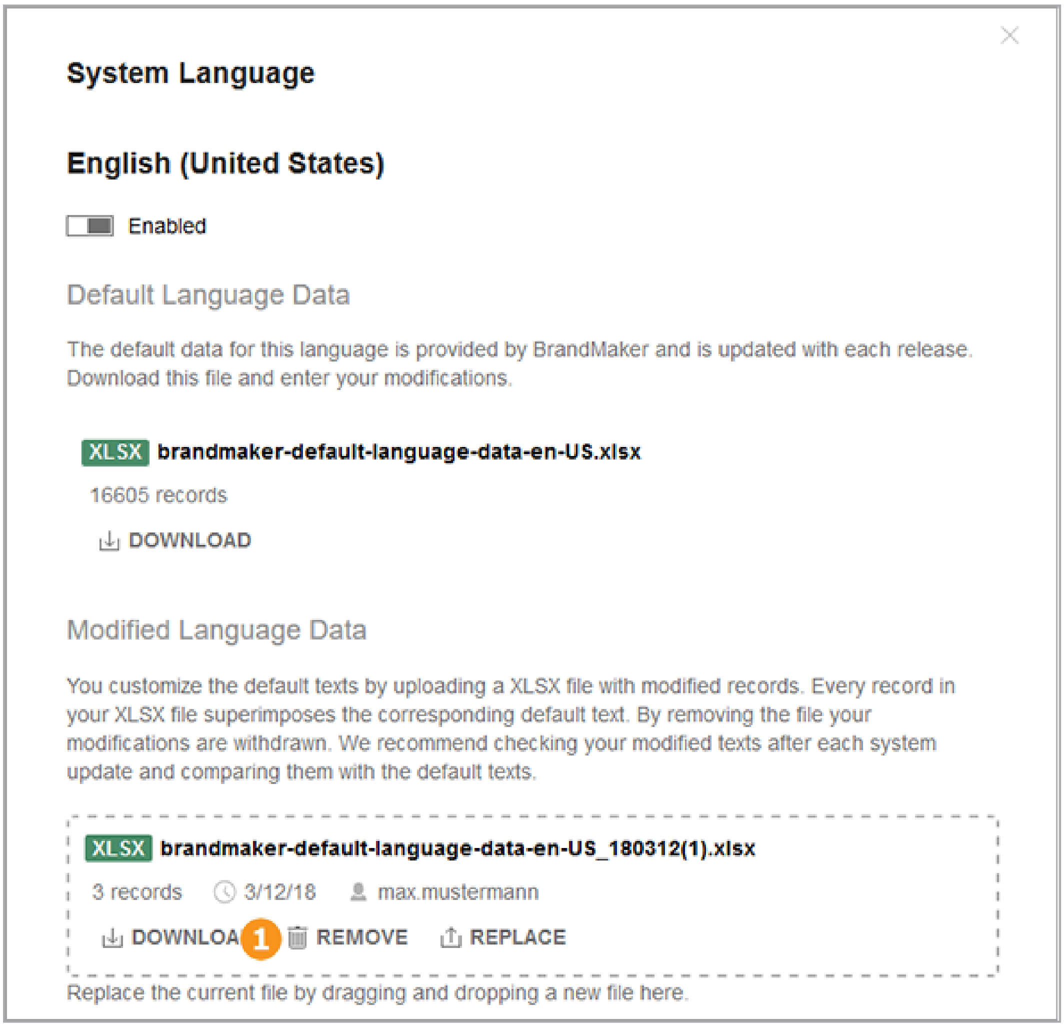
The modified texts are immediately effective and visible with the next update of your browser. The number of texts that were changed is displayed under > *Administration* > *Look & Feel* > *Interface Languages* in the default languages table for the respective language.

7.4.2.3 Resetting changes

> Attention
>
> If you reset changes, you delete all modified texts. You cannot reverse the deletion!

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. Click the *Customize* button in the line of the default language where you want to reset changes.

   A dialog box will open on the right side.



3. Click *Delete* in the bottom area of the screen 1.

The modified texts are deleted. The original texts will be displayed with the next update of your browser.

7.4.3 Customer-specific languages

In addition to the 12 default languages, you can add up to 13 customer-specific languages. Please note that you must have the interface texts translated into the respective customer-specific language yourself.

Please also note that the system only supports the depiction of so-called left-to-right languages, for example Latin or Cyrillic fonts. Asian fonts are also displayed left-to-right. You can create right-to-left, customer-specific languages, but the system displays will display them left-to-right.

Process

To create customer-specific languages in the BrandMaker system, go through the following process:

1. *Adding customer-specific language* below: Create the administration structure for the customer-specific language.
2. Define source language: Check which default language is used to translate the customer-specific language. This does not require any action in the system, but is merely a check of the source language from which your translation service provider can translate into the desired target language. If you have any questions, please contact the person responsible for translation in your company.
   Please note that the source language should always be a default language. Please also note that adjustments in the default language are only taken into account if you manually add the adjustments into the file to be translated.
3. *Defining fallback language* on page 138: Define the so-called fallback language. The fallback language is used if a text does not exist in the customer-specific language. The fallback language is always a default language.
   Ideally, the fallback language is also a source language.
4. *Downloading the source language* on page 141: Download the source language and have it be translated into the customer-specific language. The employee responsible for the translation needs the information in the *Information for the translation* on page 142 section.
5. *Uploading the translation* on page 142: Upload the translated texts.
6. *Enable customer-specific language* on page 143: Enable the now-translated language.

The users of your system can then select the customer-specific language, for example, on the login page or under *> User name > Settings > "General Settings" area > Language*.

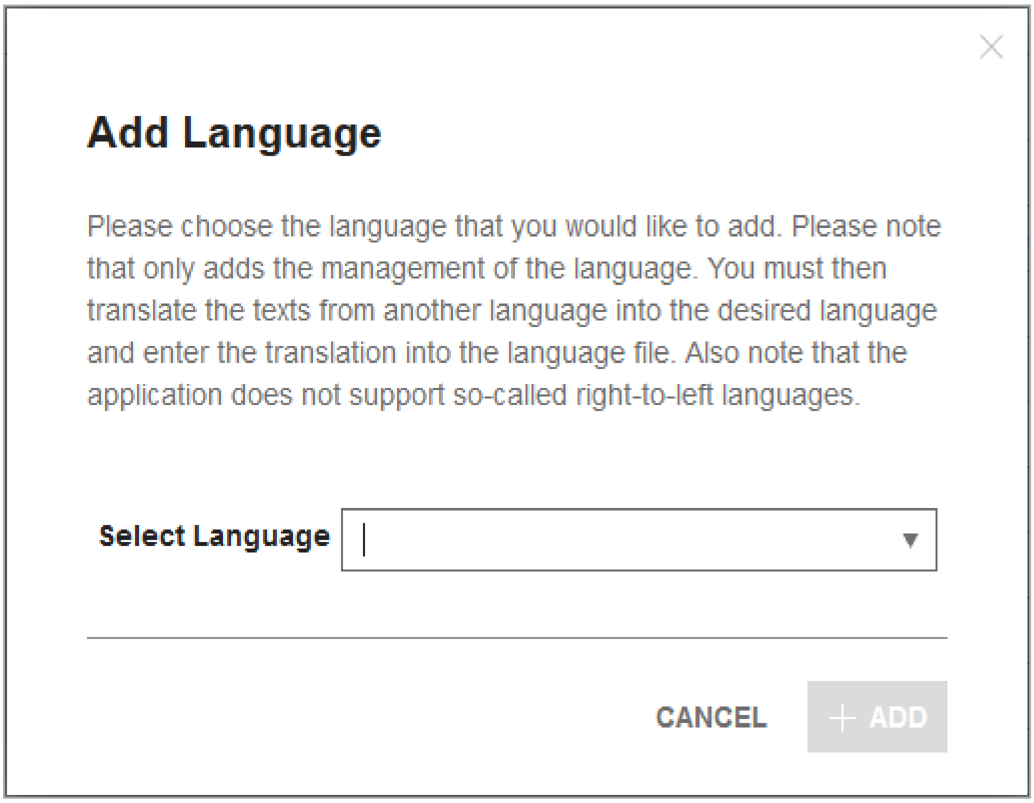
More tasks

- *Disable customer-specific language* on page 143
- *Delete customer-specific language* on page 143

7.4.3.1 Adding customer-specific language

1. Switch to the *> Administration > Look & Feel > Interface Languages* page.
2. Click the button *Add language* in the *Your customer-specific languages* area.

The *Add language* dialog box opens:



3. Select a language.

   Note: You can select right-to-left languages such as Arabic. However, the display in the system is not changed accordingly, but remains the same as for left-to-right language, for example English or German.

4. Choose *Add*.

The language is added in the *Your customer-specific languages* area. The language is not enabled, i.e. the users of the system still cannot select select the language as the interface language. The *Note* column indicates that no translated texts have yet been imported.

Next Step

Define one of the default languages as the source language for the translation with a translation manager in your company. This does not require any action in the system. The fallback language is used if a text does not exist in the customer-specific language. The fallback language is always one of the default languages. Ideally, the fallback language is also a source language. Note *Defining fallback language* on the next page.

7.4.3.2 Defining fallback language

Define the so-called fallback language. The fallback language is used if a text does not exist in the customer-specific language. The fallback language is always one of the default languages and, ideally, also a source language. The preset is the default language English (United States).

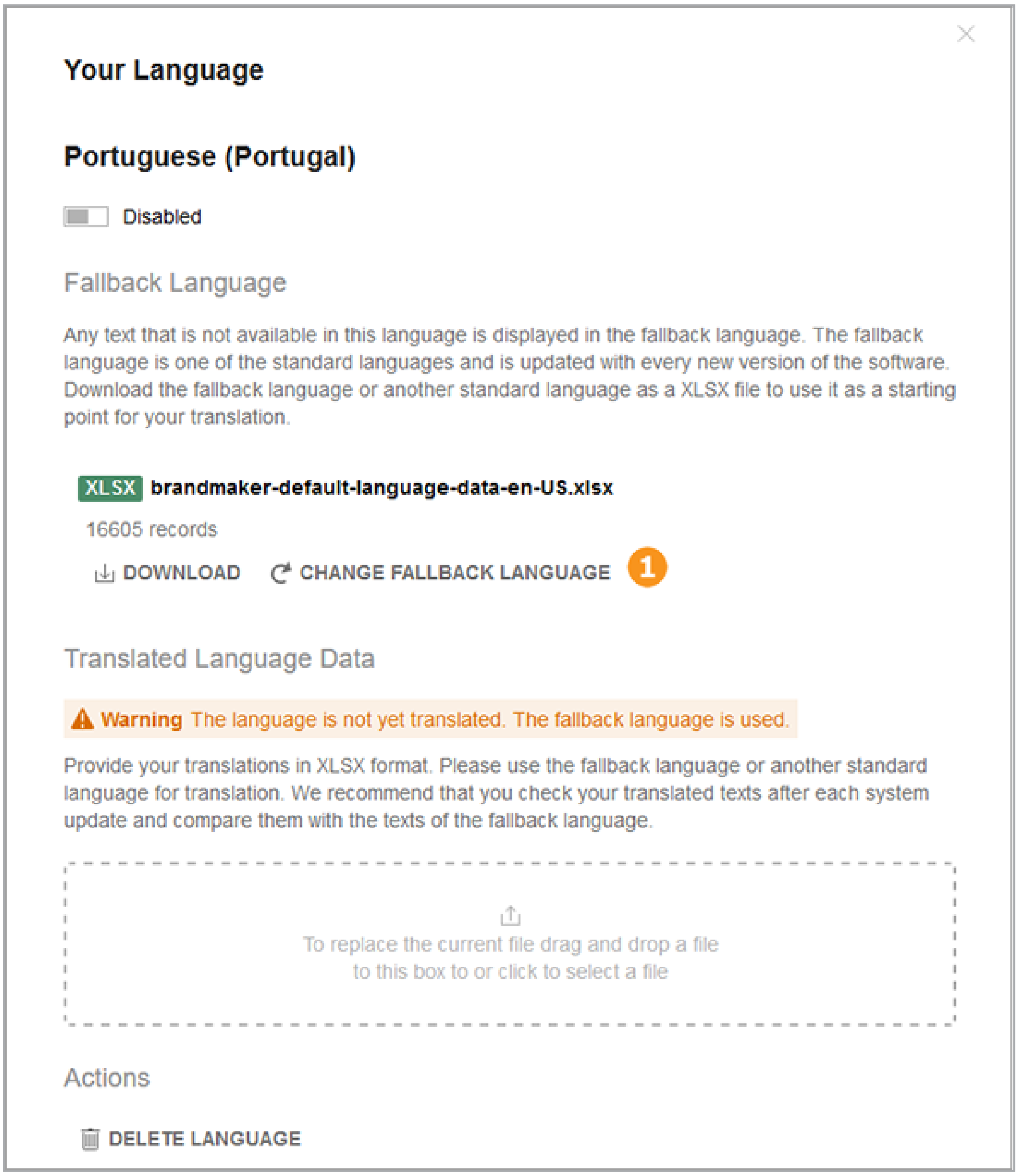
Prerequisite

You have added at least one customer-specific language. For more information, see *Adding customer-specific language* on page 136.

Defining a fallback language

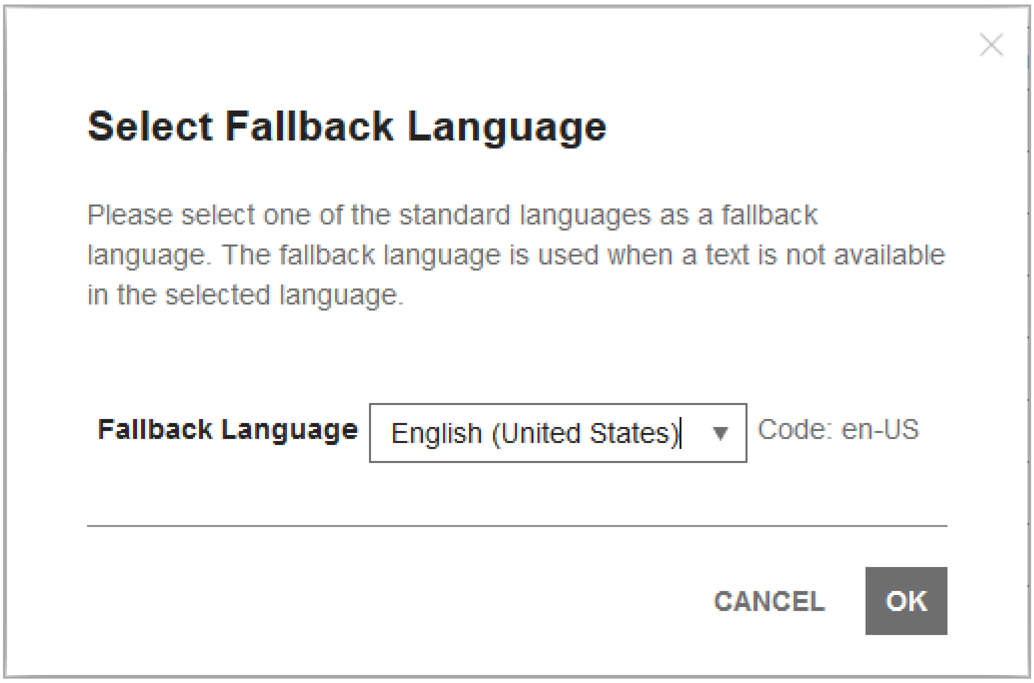
1. Switch to the *> Administration > Look & Feel > Interface Languages* page.
2. Click the *Customize* button in the *Your customer-specific languages* area for the language for which you want to define the fallback language.

   The *Your language* dialog box opens:



3. If the default fallback language of English (United States) does not match, click *Change fallback language* (1).

   The *Select fallback language* dialog box opens.



4. Select one of the default languages as a fallback language in the picklist.
5. Choose *OK*.

   The *Your language* dialog box opens again.
6. Click the *X* in the upper right corner.

   The dialog box closes.

You have changed the fallback language.

Next Step

In the next step, download the source language. For more information, see *Downloading the source language* on the facing page.

7.4.3.3 Downloading the source language

> **Note**
>
> Note that you can download the original interface texts by following the instructions below. If you want to translate from an adjusted default language, you should also download the file with the changes. Merge the two files and have the merged file translated.
> Remember that you are responsible for transferring the adjustments in the default languages into the customer-specific languages.

If the source language is not the fallback language

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. Click *Customize* in the *Default languages* area for the source language.

   The *Default language* dialog box opens.
3. Click the *Download* button in the *Default language data* area.
4. Save the file

You have downloaded the interface texts in the source language. Have the file translated. Please note that the employees responsible for the translation need the information in *Information for the translation* on the next page.

If the source language is also the fallback language

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. Click the button *Customize* in the *Your customer-specific languages* area for the language into which you want to translate.

   The *Your language* dialog box opens.
3. Click the *Download* button in the *Fallback language* area.
4. Save the file.

You have downloaded the interface texts in the source language. Have the file translated. Please note that the employees responsible for the translation need the information in *Information for the translation* on the next page.

Next Step

Upload the translated file. For more information, see *Uploading the translation* on the next page.

7.4.3.4 Information for the translation

If you are translating the interface texts of the BrandMaker application, you or the translator need the following information:

Structure of the file

When downloading, the interface texts are saved in an Excel file with the XLSX format. In the Excel file, the columns A and B are filled on the first sheet. Column A contains the keys used to assign the texts to the right locations in the interface.

> Attention
>
> Do not modify the keys in column A! If the keys are incorrect or missing, the system can no longer assign the respective text correctly!

If the translation is performed using a CAT (Computer Aided Translation) tool, such as a translation memory system, check whether you can lock the editing of column A.

The text to be translated is entered in column B.

Tags and variables

Please note the following features in the texts to be translated:

- *Tags*: The interface texts contain tags, for example <br/>, <a>, or <i>.
- *Variables*: Further variables are also entered in the form {x} or [%Description%].

> Attention
>
> Leave the tags and variables unchanged and do not add any tags or variables, as this changes the meaning and layout of the text.

7.4.3.5 Uploading the translation

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. Click the button *Customize* in the *Your customer-specific languages* area for the language into which you want to translate.

   The *Your language* dialog box opens.

3. Upload the translated Excel file:
    - Drag and drop the file to the bottom area of the dialog box.

      OR
    - Click on the bottom area and select the Excel file.

      The file is uploaded.
4. Close the dialog by clicking the *X* in the top right.

You have uploaded the translation.

Next Step

In the next - and final - step, enable the customer-specific language, see *Enable customer-specific language* below.

7.4.3.6 Enable customer-specific language

1. Go to > *Administration* > *Look & Feel* > *Interface Languages*.
2. In the *Customer-specific languages* area, click the switch in the first column of the line of the language you want to enable.

   The switch is displayed as follows: 

You have enabled the customer-specific language. For example, the user can choose from the activated languages on the login page or under > *User name* > *Settings* > *"General Settings" area* > *Language*.

7.4.3.7 Disable customer-specific language

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. In the *Customer-specific languages* area, click the switch in the first column of the line of the language you want to disable.

   The switch is displayed as follows: 

You have disabled the customer-specific language. The user can no longer select disabled languages as the interface language.

7.4.3.8 Delete customer-specific language

1. Switch to the > *Administration* > *Look & Feel* > *Interface Languages* page.
2. In the *Customer-specific languages* area, click the *Customize* button in the line of the language that you want to delete.

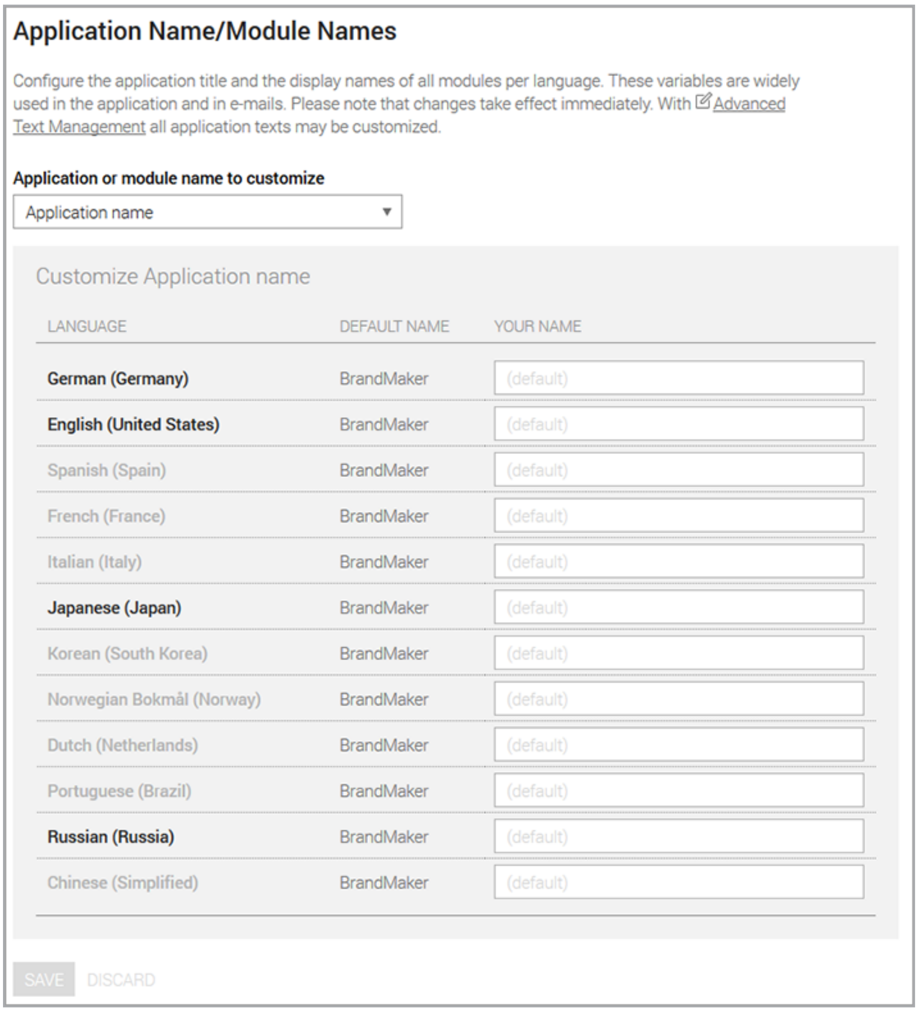
   The *Your language* dialog box opens.
3. Click *Delete language* in the bottom area of the screen.

You have deleted the customer-specific language. The interface texts are displayed in the default language.

7.4.4 Application and module names

The names of the application and modules are used in many places in the system, for example in the navigation, but also in field names such as *Usable in Brand Template Builder* (property of an asset in Media Pool). You can change these descriptions centrally and depending on the language. Your new names are then used in all interface texts, depending on the set interface language.

You can change the names under > *Administration* > *Look & Feel* > *Application and Module Names*:



The table shows the list of default languages and the customer-specific languages created in the system. Enabled languages are highlighted.

Select the application or a module in the dropdown list. Then enter the new names for the required interface languages in the table. If a field is empty, the system uses the name displayed in the *Default name* column.

Go through all required modules and the application one after the other and enter your changes. Then click *Save* below the table to save your entries. You changes are immediately effective and visible with the next update of your browser.

If you want to undo your current adjustments, click *Discard*. The system then uses the last saved status.

7.5 E-mail templates

The Marketing Efficiency Cloud sends notifications to users when various events occur. Examples of such events are requests for a password reset or warning of account deactivation in the near future. You can edit the templates for these e-mails for each language under > *Administration* > *Look & Feel* > *E-mail Templates*.

> **Note**
>
> Currently, you can only edit the e-mail templates used by the admin-istration.

Editing options

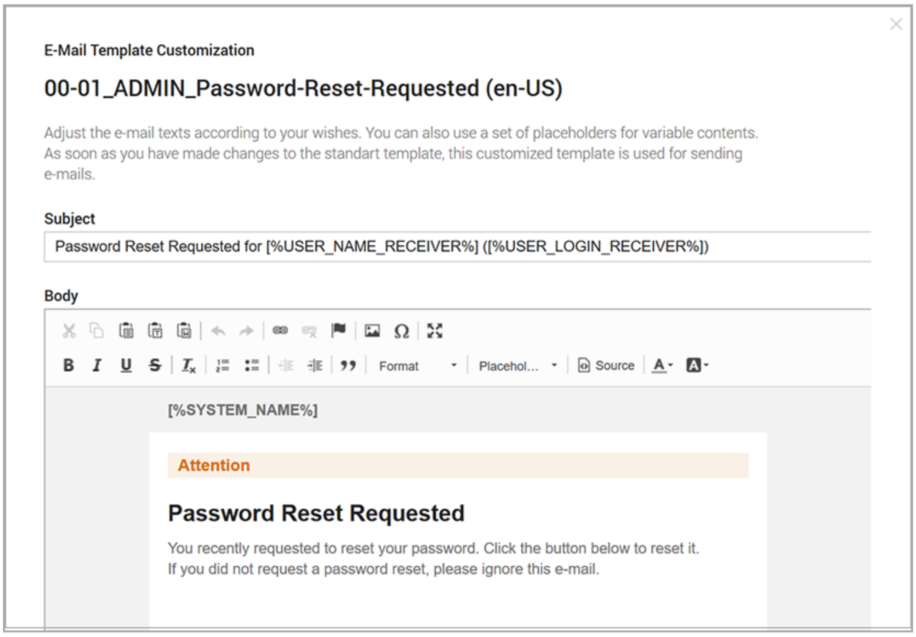
The chapter *Editing Options* below describes the options you have for customizing the e-mail templates.

Associated Tasks

- *Editing an e-mail template* on page 148
- *Reset Modified E-mail Template* on page 149

7.5.1 Editing Options

The e-mail template will open in the following dialog box:



You have the option of editing the subject under which the notification is sent and the message body.

The message body will open in an editor. The editor provides the following functions:

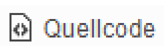
Editing

Button	Description
	Cut
	Copy
	Paste
	Insert as plain text
	Insert from Word
	Undo or redo changes

Objects

Object	Description
	Insert/Edit link
	Remove link
	Create/Edit anchor
	Insert/Edit image
	Insert special character

Display

Object	Description
	Turn full-screen display on/off
	Display e-mail in source code

Formatting

Object	Description
B	Bold
I	Italics
U	Underline
	Remove formatting
	Insert/Remove numbering
	Insert/Remove bulleted list
	Increase/Decrease indent
	Paragraph as block quotation
Format	Modify paragraph format
Placehol...	Insert variable
	Modify font color
	Modify background color

7.5.2 Editing an e-mail template

1. Choose > *Administration* > *Look & Feel* > *E-mail Templates*.
2. Select the module whose e-mail template you want to change.
3. Select the e-mail template you want to customize.

   The table shows the templates for all system languages.
4. Click the *Edit* button in the row of the language whose template you want to change.

   The e-mail template will open to the right.
5. Edit the template. Note the *Editing Options* on page 146.

6. Optional: To test your changes, click *Send test e-mail*.

   The system will send the e-mail with your modifications to your e-mail address.

7. Click *Save*.

You have modified the e-mail template. The system will now use the modified e-mail template.

7.5.3 Reset Modified E-mail Template

1. Choose > *Administration > Look & Feel > E-mail Templates*.
2. Select the module whose modified e-mail template you want to reset.
3. Select the e-mail template.

   The table shows the templates for all system languages.

4. Click the *Edit* button in the row of the language whose template you want to reset.

   The e-mail template will open to the right.

5. Click *Reset*.
6. A message is displayed.
7. Choose *OK*.

You have reset the modified e-mail template. The system will now use the standard e-mail template.

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8

System Configuration

This chapter describes how to adapt the system to your requirements (for example, configuring the login process or adjusting the module navigation).

8.1 Login configuration

You have a number of different options for configuring the login for authenticating users in the system:

- *Manual login*: The user enters a valid, active user name and the allocated password. The user logs in by clicking Login. The manual login should only be deactivated if the login for each user can be performed using SSO.
- One-click login: The user clicks *One-Click Login* and logs into the system using Single Sign-On (SSO). If you have any additional questions, contact your contact person.
- *Remember me* function: If the user activates this function when he or she logs in, the system remembers the login for a set period of time. If the user does not log out, neither a manual login or manual authentication using single sign-on are required within this time period. The user is sent directly to the start page when he or she accesses the system. See also the chapter *"Remember me" function* below.
- *Request an account* function: If people that do not have any access data visit the login page, they can use this function to request a user account. Under > *Administration > Users & Groups > User Account Registration*, you can configure which additional data is requested (see the chapter *Registration form for user account registrations* on the next page). An administrator approves the requests under > *Administration > Approvals > User Accounts*.
- *Forgot your password?* function: If users have forgotten their password, they can use this function to reset the password. The function can be switched on and off . See the chapter *"Forgot your password?" function* on page 156.

8.1.1 "Remember me" function

If the user activates this function when he or she logs in, the system remembers the login for a set period of time. If the user does not log out, neither a manual login or manual authentication using single sign-on are required within this time period. The user is sent directly to the start page when he or she accesses the system.

Prerequisites

Note: To perform this function as expected with single sign-on, you must use an identity provider with the same functionality.

Settings

The *Administration: Remember me* function has been configured. You can enter the following values:

- Enter the number of days that the system can remember the user login; for example, enter 14 for 14 days.
- 0: The logins are remembered forever.
- -1: The function is deactivated.

8.1.2 Registration form for user account registrations

Under > *Administration* > *Users & Groups* > *Account Registrations*, you can choose which additional information is requested from the user after requesting a user account. Activate the individual checkboxes to specify:

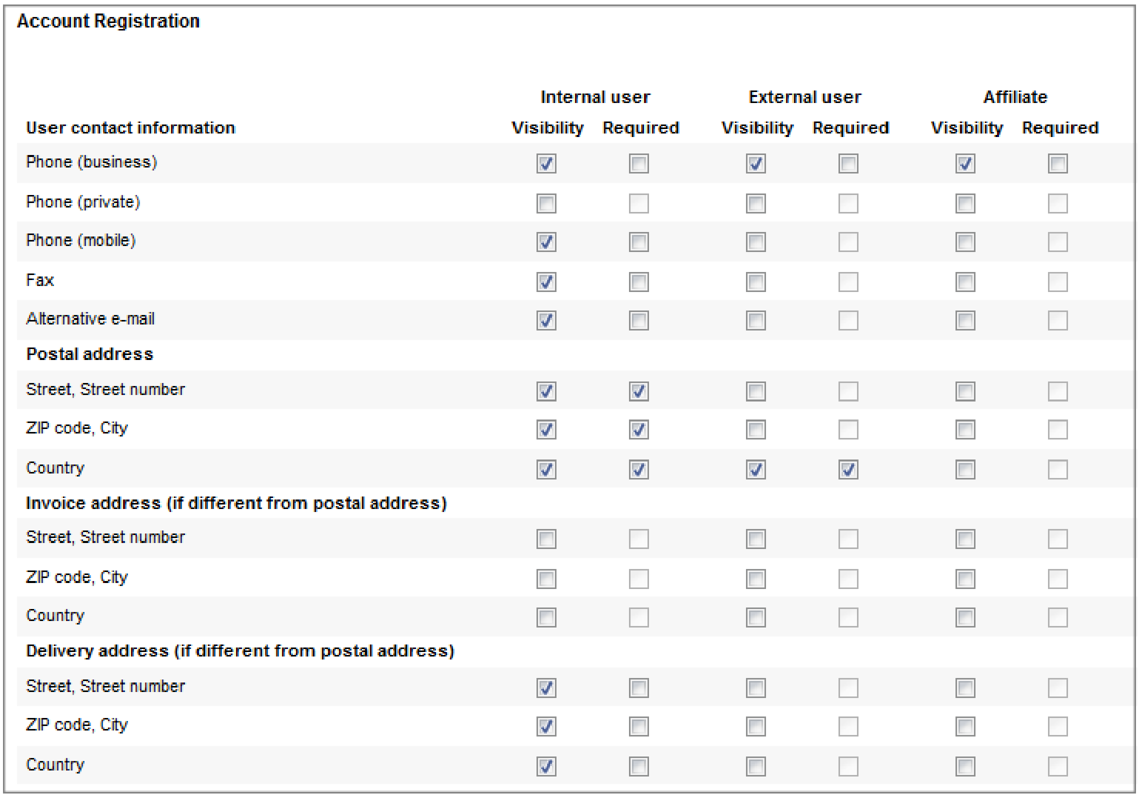
- Which contact information is requested
- which entries are mandatory fields.

You can also specify which countries can be selected from the *Country* dropdown list. The dropdown list is also displayed in the address information in the user area.

Prerequisites

You have the right MANAGE_ACCOUNT_REGISTRATION.

> **Note**
>
> The user data can be edited afterwards by the user themselves (> Your user name) or by an administrator (> Administration > Users & Groups > Manage Users).



Account Registration

User contact information	Internal user Visibility	Internal user Required	External user Visibility	External user Required	Affiliate Visibility	Affiliate Required
Phone (business)	☑	☐	☑	☐	☑	☐
Phone (private)	☐	☐	☐	☐	☐	☐
Phone (mobile)	☑	☐	☐	☐	☐	☐
Fax	☑	☐	☐	☐	☐	☐
Alternative e-mail	☑	☐	☐	☐	☐	☐
Postal address						
Street, Street number	☑	☑	☐	☐	☐	☐
ZIP code, City	☑	☑	☐	☐	☐	☐
Country	☑	☑	☑	☑	☐	☐
Invoice address (if different from postal address)						
Street, Street number	☐	☐	☐	☐	☐	☐
ZIP code, City	☐	☐	☐	☐	☐	☐
Country	☐	☐	☐	☐	☐	☐
Delivery address (if different from postal address)						
Street, Street number	☑	☐	☐	☐	☐	☐
ZIP code, City	☑	☐	☐	☐	☐	☐
Country	☑	☐	☐	☐	☐	☐

8.1.2.1 Example: Defining valid countries

You want to specify that users can only select the following countries for the *Postal address*, *Invoice address*, and *Delivery address* in the *My data > Settings* area: *Germany*, *France*, *Great Britain*, *United States*.

Prerequisites

- You have the right MANAGE_ACCOUNT_REGISTRATION for opening the area > *Administration > System Configuration > Account Registration*.
- Users must have the right EDIT_MY_DATA for calling the *My data* area using their user name.

Defining valid countries

1. Choose > *Administration* > *System Configuration* > *Account Registration*.
2. In the *Select country* dropdown list, select the entries *Germany*, *France*, *Great Britain*, and *United States* one after the other.
3. Choose *Save* to confirm your selection.

   Note: If you are defining valid countries for the first time, an info message informs you that all existing entries in the *Country* input fields in the *My data* area will be deleted after your final save. User information that is imported via the SSO interface is not affected by this.

In the *My data* > *Settings* area, you have specified the valid countries that the users can select for the *Postal address*, *Invoice address*, and *Delivery address* and when requesting an account.

8.1.3 "Forgot your password?" function

If you want to allow users to reset their password, change the system setting *Administration: Password button login page*. If this system setting is activated, the function can be accessed by users.

8.2 Password security

To increase the security for the passwords that are in use, you have the following options:

- You can add simple passwords such as admin or 12345 on the password blacklist. Passwords entered here cannot be used (*Password blacklist* below).
- You can define rules for valid passwords in the system settings (*Rules for valid passwords* below).

8.2.1 Password blacklist

To prevent unauthorized access to your system, you can create a password blacklist. Passwords that are entered in the blacklist cannot be used when a password is being created or changed. Examples:

- 12345
- abcdef
- admin

Prerequisites

You have the right MANAGE_ACCOUNT_REGISTRATION.

Locking a password

1. Choose > *Administration* > *Users & Groups* > *Password blacklist*.
2. In the field *Add password to blacklist*, enter the password that is not permitted for use.
3. Click the plus sign on the right-hand margin of the field.

The password is entered on the blacklist below the field.

If you want to delete the password from the blacklist, click the icon .

8.2.2 Rules for valid passwords

In the following system settings, you can define the rules for valid passwords.

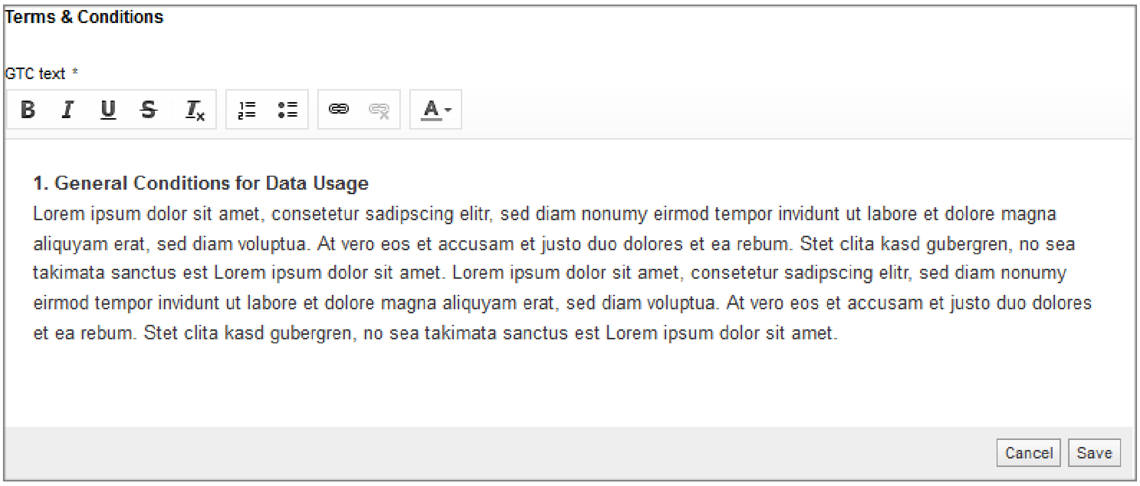
System setting	Description
Password Number of old passwords	Enter the number of old passwords that may not be reused. The value 0 means that there are no restrictions.
Password AutoCom-plete function	Switch the AutoComplete function for password fields on and off.
Password Validity	Enter the validity period of the password in days. The value 0 means that the password is valid for an unlimited period.
Password Maximum number of password changes	Enter the maximum number of password changes permitted per day. The value 0 means that there are no restrictions.
Password Minimum number of uppercase letters	Enter the minimum number of uppercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0. Default: 1
Password Minimum number of lowercase letters	Enter the minimum number of lowercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password Minimum number of special characters	Enter the minimum number of special characters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0. Default: 1
Password Minimum number of digits	Enter the minimum number of digits in the password. The value 0 means that there are no restrictions. Negative values or blank entries are inter-preted as 0. Default: 1
Password Minimum length	Enter the minimum length of the password. The value 0 means that there are no restrictions. Negative values or blank entries are inter-preted as 0. Default: 8

8.3 Activating general terms and conditions

The general terms and conditions (GTC) state the conditions that users must accept in order to use content and information provided in the Marketing Efficiency Cloud. Choose > *Administration* > *Users & Groups* > *GTC settings* to create and edit the text of the GTC in the required language versions.

Prerequisites

- You have the right MANAGE_GENERAL_TERMS_AND_CONDITIONS.
- The system setting *Administration: General terms and conditions* is set to the value "true".



8.3.1 Example: Creating GTCs

You want to create the GTC in the system languages German, English, and French. When someone registers with the Marketing Efficiency Cloud, the GTC must be accepted once.

Prerequisites

- You have the right MANAGE_GENERAL_TERMS_AND_CONDITIONS.
- The system setting Administration: General terms and conditions is set to the value "true".

Creating GTCs

1. Choose > *Administration* > *Users & Groups* > *GTC settings*.
2. From the dropdown list in the area on the right, select the entry DE.

3. Click *Edit*.

   This opens an editor.

4. Enter the text for the German GTC.
5. Click *Save*.
6. From the dropdown list in the area on the right, select the entry EN.
7. Repeat steps 3 to 5.
8. From the dropdown list in the area on the right, select the entry FR.
9. Repeat steps 3 to 5.
10. Choose *Request acceptance*.

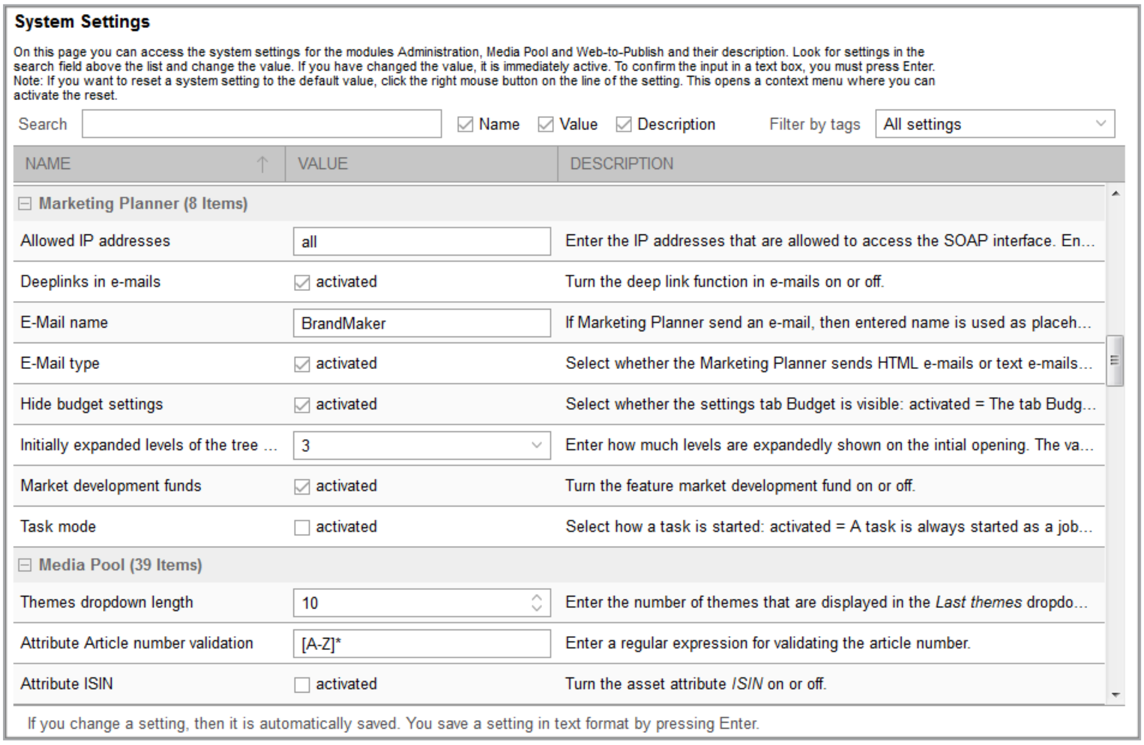
You have created the GTC in the selected system languages. Each user must accept the GTC once after registering.

> **Note**
>
> If you change and edit the saved GTC and choose *Request acceptance*, then each user must accept the GTC again.

8.4 System settings

On the > *Administration* > *System Configuration* > *System Settings* page, you can mange the settings for the following modules:

- Administration
- Brand Management Portal
- Job Manager
- Marketing Data Hub
- Marketing Planner
- Marketing Shop
- Media Pool
- Reporting Center
- Review Manager
- Smart Access
- Brand Template Builder



The table displays the name, value, and a description of the settings. If the description cannot be displayed in full in a line, set the mouse pointer on the description. The complete description is then displayed in a tooltip.

You can use the search field above the list to search for specific settings. Use the checkboxes above the list to switch the search on or off in the relevant column. Use the *Filter by tags* list to limit the settings displayed to predefined thematic key areas.

If you change a setting in the text style, press Enter to apply the change. Changes in other style are applied immediately. To undo a setting, right-click the setting and choose either *Set default value* or *Undo*. If you choose *Set default value*, the system setting is set to the default value. If you choose *Undo*, the last saved value is set.

Note

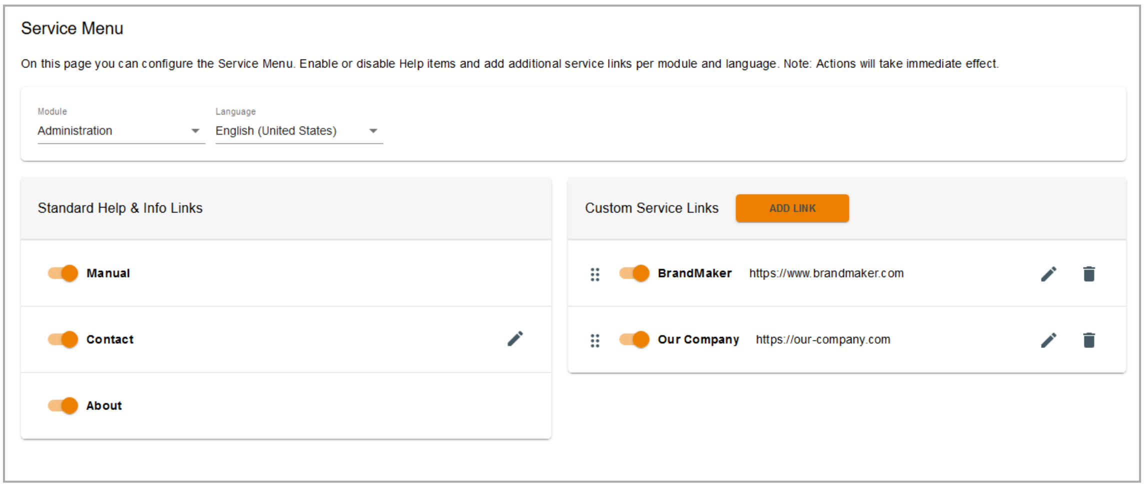
Note that a changed setting comes into effect immediately. A system restart is no longer required.

For a complete list of all of the available system settings, see the chapter *System Settings* on page 244.

8.5 Service menu

Each module has a service menu that provides various service links for the user, such as the user guides for the module or a contact for further questions. The service menu consists of two sections: the top section lets you activate up to three standard links. In the lower section, you can add up to ten custom links.

You configure the service menu for each module and each language by choosing > *Administration > System Configuration > Service Menu*.



Module and language

In the top area, first select the module and interface language for which you want to edit the service menu.

Standard links

On the left, you can find the standard links for the top section of the service menu. The following standard links are available:

- Manual: The user can access the user guide in the service menu (exception: Smart Access). If the interface language *German* is set, the German manual is displayed. For all other interface languages, the English manual is opened (exception: the Digital Marketing Center has the German manual only).
  The link to the user guide is activated by default.
- Contact: The user can use this link to open a dialog box where you can list the internal contact persons for your company to answer further questions, including their phone numbers and e-mail addresses, for example. Click the pen icon in the line. A dialog box then opens where you can enter the internal contact persons.
  The link is deactivated by default.

- About BrandMaker: This link leads to the About Brandmaker dialog box. It provides users with information about the version of the BrandMaker system that they are using, for example.

Custom links

In the area on the right, you can add up to ten custom links per module. Choose Add Link to open the corresponding editing dialog box. Choose whether you want the link to be added in the service menu for the selected module only or for all the modules. In addition, choose whether you want to display the link in the service menu for the selected interface language only or for all the interface languages. Then enter a display name and the destination URL and choose Add. The links are listed one below the other. You can change the order of the display using drag and drop.

If you edit the link (pen icon), you can do so only for the selected module and interface language, and not for all the modules and languages at the same time.

8.6 E-mail service

You can manage the SMTP server and basic e-mail settings under > *Administration* > *System Configuration* > *E-mail Service*.

Edit your settings on the page > *Administration* > *System Configuration* > *E-mail Service* and save your entries with Save. If you click *Restore*, settings are reset back to their default values.

E-mail service settings area

Setting	Description
Default setting for the sender's e-mail address	Enter the e-mail address under which the e-mails will be sent, e.g. a noreply@ address.
Maximum attachment size (MB)	Enter the maximum size of attachments in MB. Attachments that exceed the allowed size are removed before sending.

The Settings area of the SMTP server

Setting	Description
Server address	Enter the host name of the SMTP server that will be used by the application.
SSL/TLS	If activated, the connection to the e-mail server is secured by TLS encryption. If the e-mail server STARTTLS is not supported, the connection is kept without TLS encryption.
SMTP authentication	Turn authentication for the SMTP server on or off.
Username for SMTP authentication	Note: Only if authentication is enabled on the SMTP server. Enter the username for authentication on the SMTP server.
Password for SMTP authentication	Note: Only if authentication is enabled on the SMTP server. Enter the password for authentication on the SMTP server.

Sending a test e-mail

If you want to test whether your entries are correct, click the *Send test e-mail* button in the lower *Test settings* area.

8.7 Rich text editor

The Marketing Efficiency Cloud uses a rich-text editor at various points. You can configure the editor for use at the following points:

- In templates in *Brand Template Builder* module
- In custom structures for *Rich text*-type attributes.
- In Marketing Data Hub and Job Manager for *Multiline input area*-type variables.

The following sections describe which configurations you can set.

8.7.1 Configuration

The following handling instructions describe how to create a new configuration for the rich text editor.

Prerequisites

You have the right MANAGE_EDITOR_CONFIGURATION.

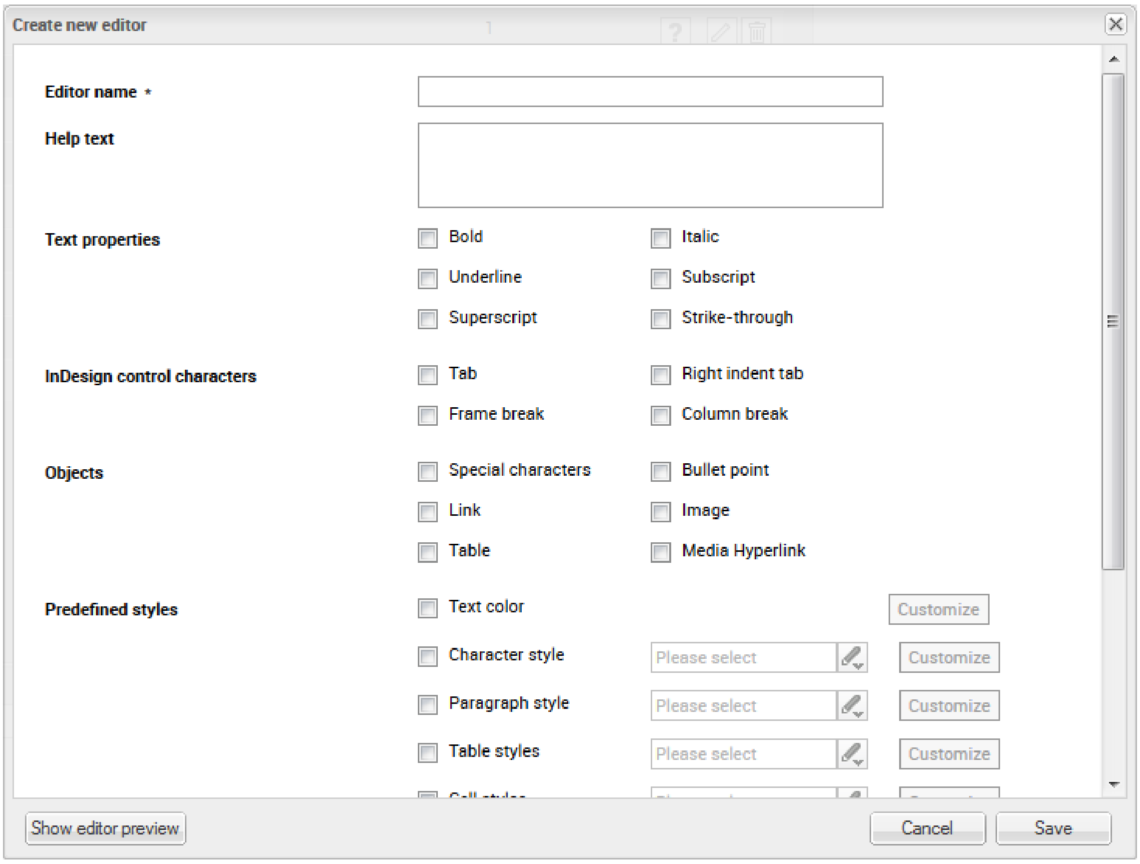
Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Configuration*.

   The list of configurations opens.
2. Choose *Create new editor configuration* below the list.

   The *Create new editor* dialog box opens.
3. Enter a name in the *Editor name* field.
4. Enter a help text if required.
5. Activate the checkboxes to create the editor configuration. Note the descriptions in the tables below.
6. Click the editor preview to check your settings.
7. Choose *Cancel* to exit the editor preview.
8. Click *Save*.

You have created a new editor configuration that is displayed in the list of editor configurations. You can edit the configuration at any time by clicking the button in the list line. Click the button to delete the editor configuration. If the editor configuration is already in use, a dialog box opens in which you can select a different editor configuration to replace the one to be deleted. In the *Used in Brand Template Builder* column, click the ? button to open a preview of the templates in *Brand Template Builder* module that use the rich text editor with this configuration.



> **Note**
>
> The overview of available editor configurations displays the number of templates in *Brand Template Builder* module in which the editor configuration is used.

Name	Description
Editor name	Enter the name used to display the editor configuration.
Help text	Enter additional information (about using the item, for example).
Text properties	Activate the checkboxes to permit text formatting.
Insert objects	Activate the checkboxes to allow objects such as tables, hyperlinks, or special characters to be added in the text editor.

Name	Description
Predefined styles	Define the text color. For the paragraph, character, table, and cell formats, select from the following dropdown lists: • *Custom selection*: Select the character and paragraph formats that can be used in the text editor. • *Predefined styles*: You can use all of the existing formats in the text editor. • *Document styles*: If you use the configuration in *Brand Template Builder* module, you can use the styles that are created in the InDesign document. If you use the configuration in a different BrandMaker module, you can use predefined styles. • *Textbox styles:* If you use the configuration in *Brand Template Builder* module, you can use the styles of the active textbox. If you use the configuration in a different BrandMaker module, you can use predefined styles.
View options	Activate the checkboxes to allow the source text to be displayed and the text editor to be maximized.
Search	Activate the checkbox to enable the search and replace function in the editor.
Show editor preview	The preview is generated in accordance with the configured settings.

> **Note**
>
> Note that in the rich text editor, regardless of the editor configuration, users can use the common key combination to insert text: CTRL + V / CMD + V. When inserting texts from Word, any formatting that is also created for the rich text editor is transferred.
> This also includes content from Excel tables. Please note that, when you insert from Excel, the table is transferred without formatting.

8.7.2 Styles

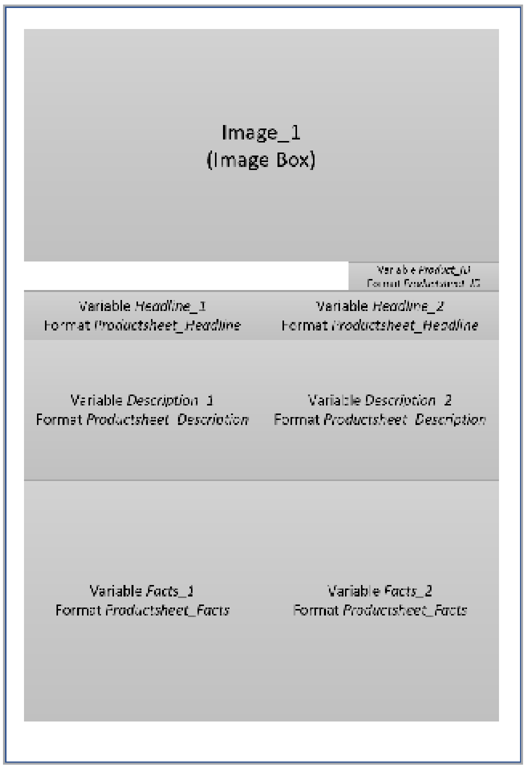
> **Note**
>
> Note that the styles of the rich-text editor are only used to display texts in the rich-text editor. Text that is entered in documents in *Brand Template Builder* module is also displayed in these styles when it is entered using the rich-text editor. However, the text is displayed in the template styles in the completed document.

Replacement styles

Fonts generally do not cover the entire Unicode character set. To ensure that the correct character set is used for each locale, you can define replacement styles. Replacement styles are always applied within the context of one or more locales defined by the administrator.

> **Note**
>
> Please note that replacement styles are currently used only in the *Brand Template Builder* module.

The following example shows a multilingual document in *Brand Template Builder* module that lists a product and image along with textual, language-dependent information displayed as the headline, description and facts. The headline, description and facts all have the same styles in the two columns:



If, for example, a font containing Latin characters but no Cyrillic or Chinese characters is assigned to this style, language combinations such as en-US and de-DE can be displayed without any errors in this document. To ensure that combinations such as en-US and zh-Hans or ru-RU can also be displayed, the administrator creates replacement styles for the languages and locales required.

If the creator of the document now selects the combination en-US and zh-Hans, the *Brand Template Builder* module automatically uses the configured replacement styles:

Replacement styles are created under > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles*. When creating or editing a style, the administrator can define a list of the locales in which other styles are used.

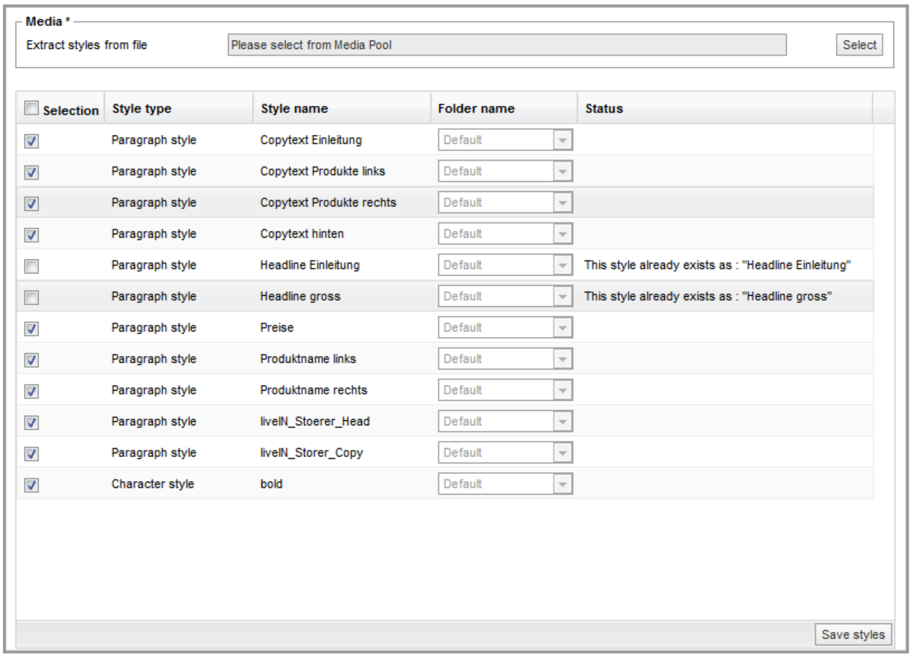
Styles can also be created purely as replacement styles. In this case, the styles are available only in the dropdown list for replacement styles and cannot be selected anywhere else.

8.7.2.1 Creating formats automatically

On the page > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Extract Styles*, you can access an extraction function that automates the transfer of existing formats from InDesign documents.

Selecting and analyzing a file

When you select a file from the Media Pool, the system analyses the document. The result shows the formats found, grouped by, for example, paragraph style. If you do not have authorization to manage specific format types because your role does not, for instance, have the right MANAGE_CHARACTER_STYLES the formats for this type are not displayed in the list.



Formats that have not been created yet are preselected in the first column. If a format has already been created, you are given appropriate notification in the *Status* column. You can still select the format to create format changes in a new format, for example. Note that existing formats are not overwritten.

Formats with the same type and same name that have been created in different groups may exist in the InDesign file. In this case, appropriate notification is displayed in the *Group name* and *Status* columns. Choose which format you want to adopt.

The names of the formats are also checked in the InDesign file during the analysis. If format names do not comply with the provisions, the formats cannot be created. These formats are displayed in gray in the list. For more information about the provisions, see the descriptions in the chapters below.

Creating formats

Select the required formats in the first column and choose *Save*. The system creates the formats and adopts the as much of the formatting as possible. You must then check whether the formatting was created correctly.

8.7.2.2 Character style

So that you can work with a document that is as true to the original as possible when customizing advertising material, you can create the corresponding character styles for the text editor.

Prerequisites

You have the right MANAGE_CHARACTER_STYLES.

Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Character Styles*.

   The list of character styles is displayed.

2. Choose *New character style* below the list.

   The *Create style* dialog box opens.

3. Edit the fields. Mandatory fields are marked with *. Note the description of the fields in the table below.

4. Click *Save*.

You have created a character style. To change an existing character style, go to the list line for the character style and choose . Use the button to delete the character style.

Name	Description
Name	Enter the name with which the style is to be displayed.
INDD-Name	Enter the name with which the style is created in the InDesign document. Use the following characters only: a-z, A-Z, 0-9, underscore (_), and hyphen (-). The name must be unique within the INDD file.
Only replacement style	If you activate this checkbox, the style can be used only as a replacement style for other styles (see *Styles* on page 169). All the settings described below are then inapplicable.
Font type	Select the font type from the dropdown list.
Font weight	Select the font weight from the dropdown list (for example, normal or bold).
Font size	Select the font size from the dropdown list (in pt).
Font style	Select the inclination of the font from the selection list.
Text decoration	From the selection list, choose whether the text is to be displayed with underline, line through, or overline.
Vertical align	From the selection list, select the vertical alignment of the text (for example, with sub super)
Font color	Define the font color. Use the color picker to make it easier to select the color value or enter it in different color systems.

Name	Description
Margin top	Define the upper gap.
Bottom margin	Define the lower gap.
Locale	In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 169). If the style that you are creating or editing contains only Latin characters, for example, you can define one style with a Chinese font for the locale zh-Hans and one style with Cyrillic font for the locale ru-RU. 1. Click *New Replacement*. 2. A dialog box opens. 3. In the dropdown lists, select a locale and style. 4. Click *Save*. You have created a replacement style. If you want to edit the replacement style, click the pencil icon in the table. If you want to delete the replacement style, click the recycle bin icon. Note that you can delete a replacement style only if it is not in use.

Note

The names of styles must exactly match the names of styles (*INDD name* field) used in the template in *Brand Template Builder* module. The actual formatting for the texts is carried out with the linked styles in the InDesign document.

8.7.2.3 Paragraph style

So that you can work with a document that is as "true to the original" as possible when customizing advertising material, you can create the corresponding paragraph styles for the text editor.

Prerequisites

You have the right MANAGE_PARAGRAPH_STYLES.

Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Paragraph Styles*.

   The list of paragraph styles is displayed.

2. Choose *New paragraph style* below the list.

   The *Create style* dialog box opens.

3. Edit the fields. Mandatory fields are marked with *. Note the description of the fields in the table below.

4. Click *Save*.

You have created a paragraph style. To change an existing paragraph style, go to the list line for the paragraph style and choose . Use the button to delete the paragraph style.

Name	Description
Name	Enter the name with which the style is to be displayed.
INDD-Name	Enter the name with which the style is created in the InDesign document. Use the following characters only: a-z, A-Z, 0-9, underscore (_), and hyphen (-). The name must be unique within the INDD file.
Only replace-ment style	If you activate this checkbox, the style can be used only as a replacement style for other styles (see *Styles* on page 169). All the settings described below are then inapplicable.
Font type	Select the font type from the dropdown list.
Font weight	Select the font weight from the dropdown list (for example, normal or bold).
Font size	Select the font size from the dropdown list.
Font style	Select the inclination of the font from the selection list.
Text decor-ation	From the selection list, choose whether the text is to be displayed with under-line, line through, or overline.
Alignment	Select the alignment of the text from the selection list (for example, left-aligned).
Font color	Define the font color. Use the color picker to make it easier to select the color value or enter it in different color systems.

Name	Description
Margin top	Define the upper gap.
Bottom margin	Define the lower gap.
Margin left	Define the gap on the left.
Number	If necessary, activate a bulleted list. You can choose between lists (radio button *Characters*) and numbered itemizations (radio button *Numbered*). Select an itemization character or numbering as required. Use the color picker to set the color.
Locale	In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section Replacement styles in the chapter *Styles* on page 169). If the style that you are creating or editing contains only Latin characters, for example, you can define one style with a Chinese font for the locale zh-Hans and one style with Cyrillic font for the locale ru-RU. 1. Click *New Replacement*. A dialog box opens. 2. In the dropdown lists, select a locale and style. 3. Click *Save*. You have created a replacement style. If you want to edit the replacement style, click the pencil icon in the table. If you want to delete the replacement style, click the recycle bin icon. Note that you can delete a replacement style only if it is not in use.

> **Note**
>
> The names of styles must exactly match the names of styles (*INDD name* field) used in the template (in *Brand Template Builder* module). The actual formatting for the texts is carried out with the linked styles in the InDesign document.

8.7.2.4 Table styles

So that you can work with a document that is as "true to the original" as possible when customizing advertising material, you can create the corresponding table styles for the text editor.

Prerequisites

You have the right MANAGE_TABLE_STYLES.

Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Table Styles*.

   The list of table styles is displayed.

2. Choose *New table style* below the list.

   The *Create style* dialog box opens.

3. Enter the name with which the style is to be displayed.
4. Enter the name with which the style is created in the InDesign document.
5. Activate the *Only replacement style* checkbox if the style is used only as a replacement style for other styles (see the section *Replacement styles* in the chapter *Styles* on page 169).
6. In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 169):
   1. Click *New Replacement*.

      A dialog box opens.

   2. In the dropdown lists, select a locale and style.
   3. Click *Save*.

   The dialog box closes.

7. Click *Save*.

You have created a table style. To change an existing table style, go to the list line for the table style and choose ✎. Use the 🗑 button to delete the table style.

> **Note**
>
> The names of styles must exactly match the names of styles (*INDD name* field) used in the template in *Brand Template Builder* module. The actual formatting for the texts is carried out with the linked styles in the InDesign document.

8.7.2.5 Cell styles

So that you can work with a document that is as "true to the original" as possible when customizing advertising material, you can create the corresponding cell styles for the text editor.

Prerequisites

You have the right MANAGE_CELL_STYLES.

Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Cell Styles*.

   The list of cell styles is displayed.

2. Choose *New cell style* below the list.

   The *Create style* dialog box opens.

3. Enter the name with which the style is to be displayed.
4. Enter the name with which the style is created in the InDesign document.
5. Activate the *Only replacement style* checkbox if the style is used only as a replacement style for other styles (see the section *Replacement styles* in the chapter *Styles* on page 169).
6. In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 169):
   1. Click *New Replacement*.

      A dialog box opens.

   2. In the dropdown lists, select a locale and style.
   3. Click *Save*.

   The dialog box closes.

7. Click *Save*.

You have created a cell style. To change an existing cell style, go to the list line for the cell style and choose to edit the cell style. Use the button to delete the cell style.

> **Note**
>
> The names of styles must exactly match the names of styles (*INDD name* field) used in the template in *Brand Template Builder* module. The actual formatting for the texts is carried out with the linked styles in the InDesign document.

8.7.3 Creating colors

To work with the correct color values while individualizing an advertising material, you can create colors for the editor configuration.

Prerequisites

You have the right MANAGE_COLORS.

Step by step

1. Choose > *Administration* > *System Configuration* > *Rich Text Editor* > *Colors*.

   The list of colors is displayed.
2. Choose *Create color* below the list.

   The *Create color* dialog box opens.
3. Edit the fields. Mandatory fields are marked with *. Note the description of the fields in the table below.
4. Click *Save*.

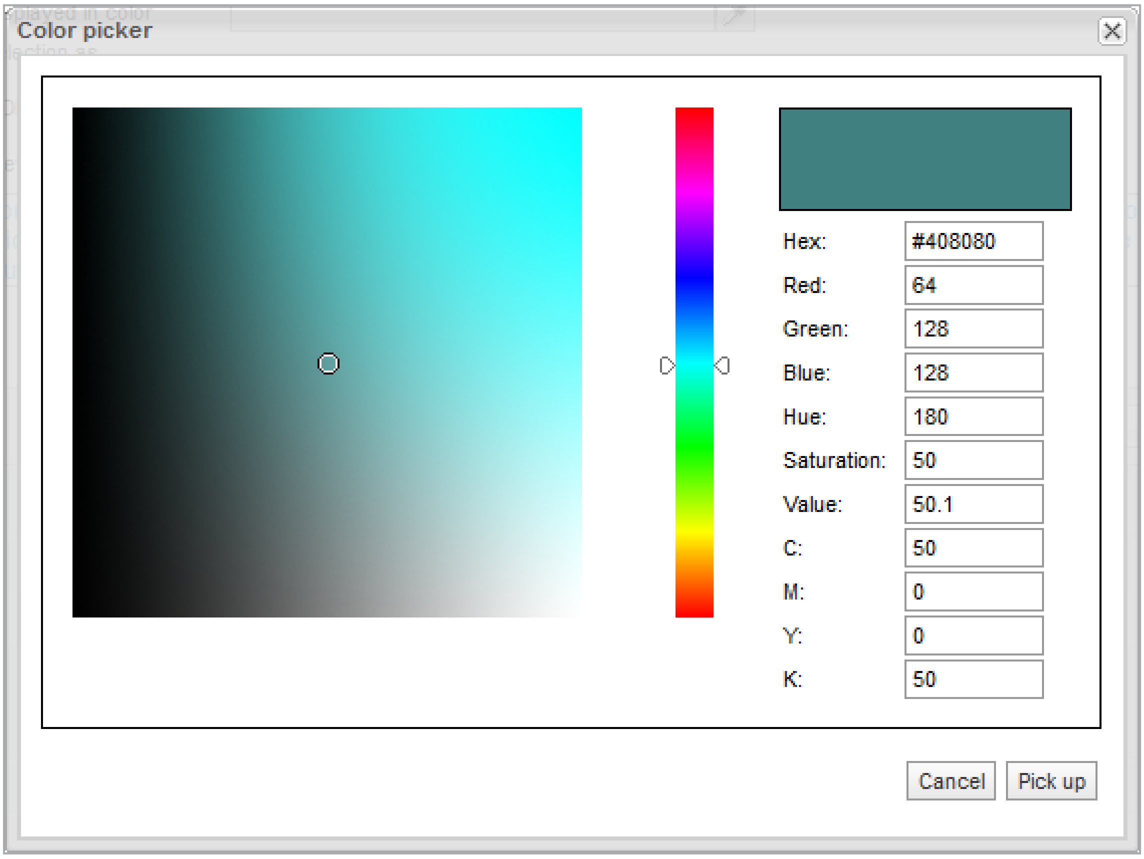
You have created a color. To change an existing color, go to the list line for the color and choose . Use the button to delete the color.

Name	Description
Name	Enter the name with which the color is to be displayed.
INDD color name	Enter the name with which the style is created in the InDesign document. Use the following characters only: a-z, A-Z, 0-9, underscore (_), and hyphen (-). The name must be unique within the INDD file.

Name	Description
Central color chooser	The selected color value is entered in the *Editor text color* field and a preview is generated automatically.
Editor text color	Define the text color. The selected global color value is predefined as the value.
Displayed in color selection as	Specify which color value is displayed in the color selection.
INDD-CMYK	Enter the CMYK value from the InDesign document. This value is used if the INDD file does not contain a color with a name that matches the entry in *INDD color name*.
Preview	The preview is displayed in accordance with the configured settings.

Note

Use the color picker to select the color value. In the dialog box that opens, you can also enter color values in the fields directly.



9

System Maintenance

9.1 System messages and maintenance messages

You can send important news or information as a user message. Depending on the individual user setting, the user message is sent by e-mail and can be accessed in the Media Pool under > *Messages*. You can also send user messages specifically:

- To selected users
- To all users to whom a specific role is assigned in a module
- To all users in a selected organizational unit
- To all users that are assigned to a selected VDB group
- To all users that are logged in at the time that the system message is sent

To inform users about pending maintenance work, you can configure and publish suitable maintenance messages. A maintenance message can be displayed in the upper navigation pane or directly on the login screen. Among other things, you can define whether or not it is possible to log into the Marketing Efficiency Cloud during the maintenance work.

9.1.1 Example: Sending a user message to an organizational unit

You want to send a system message to all users in the *Marketing* organizational unit.

Prerequisites

You have the right MANAGE_SYSTEM_MESSAGES.

Step by step

1. Choose > *Administration* > *System Maintenance* > *User Messages*.
2. From the *Language* dropdown list, select the entry *Any available language*.

   Note: You can select one language so that the system message is sent only to users who use the selected language.
3. From the *Recipient* dropdown list, select the entry *Select by organizational unit*.

   This expands the input screen.
4. Activate the checkbox for the *Marketing* organizational unit.
5. Choose *Add organizational units*.

6. Enter the date until which the system message is valid.
7. Enter the *subject* of the system message.
8. Enter the text for the system message in the *Message* input field.
9. Choose *Send message*.

The system message has been sent to all users in the *Marketing* organizational unit.

9.1.2 Example: Configuring a maintenance message

You want to configure a maintenance message due to *system maintenance*. You want to display the message on the login page, but not in the application header, from 18:00 on March 13, 2023 to midday on March 14, 2023. You do not want users to be able to log into the Marketing Efficiency Cloud during the system maintenance. You also want to send the maintenance message by e-mail at midday on March 12, 2023.

Prerequisites

You have the right MANAGE_MAINTENANCE_MESSAGE.

Step by step

1. Choose > *Administration* > *System Maintenance* > *Maintenance Notification*.
2. Open the *Notification* area and configure the settings for displaying the message on the login page:
    1. Click the *Date* field.

       A calendar dialog box opens.
    2. Choose *From/to*.
    3. Click March 13, 2023 and March 14, 2023.
    4. In the *From* area, click the *Select time* field and choose 18:00.
    5. In the *To* field, click the *Select time* field and choose midday.
    6. Choose *Apply*.

       The calendar dialog box closes.
    7. In the *Notification* area, enter your text for the maintenance message.
    8. Ensure that the *Header of the application* checkbox is deactivated.
    9. Activate the *Login screen* checkbox.
    10. Click *Save*.

11. Choose *Schedule*.

    The time control for automatically displaying the message is started. The message is created and will be displayed in the desired time period.

3. Open the *Login lock* area and configure the settings for locking the login in the desired time period:
    1. Click the *Date* field.

       A calendar dialog box opens.
    2. Choose *From/to*.
    3. Click March 13, 2023 and March 14, 2023.
    4. In the *From* area, click the *Select time* field and choose 18:00.
    5. In the *To* field, click the *Select time* field and choose midday.
    6. Choose *Apply*.

       The calendar dialog box closes.
    7. Choose *Schedule*.

       The time control for automatically locking the login is started.
4. Open the *E-mail* area and configure the settings for sending an e-mail at the desired time.
    a. Click the *Date* field.

       A calendar dialog box opens.

    b. Click March 12, 2023.

    c. In the *From* area, click the *Select time* field and choose midday.

    d. Click *Apply*.

       The calendar dialog box closes.

    e. Enter your text in the *E-mail message* field.

    f. Click *Save*.

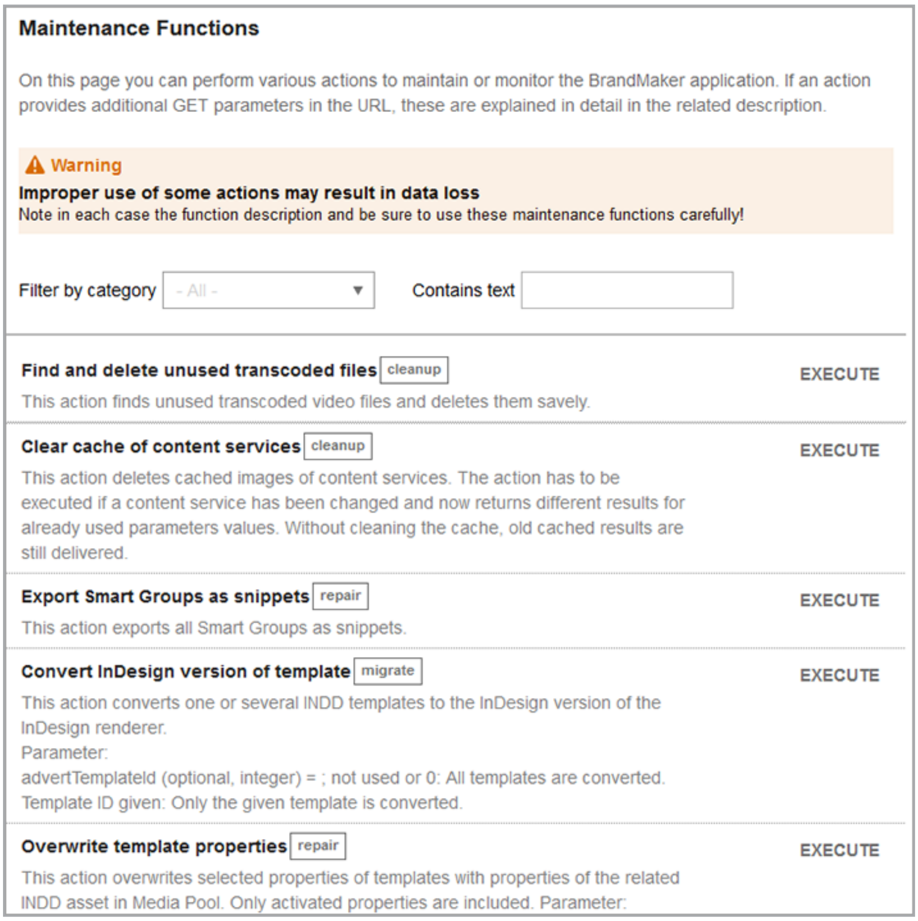
    g. Choose *Schedule*.

       The time control for automatically sending the e-mail is started. The e-mail is created and will be sent at the specified time.

The maintenance message has been created: at midday on March 12, 2023, the message will by sent to all the system users by e-mail. From 18:00 on March 13, 2023, an appropriate message will be displayed on the login page but not in the header. A login lock will begin at the same time. The login page will stop displaying the message at midday on March 14, 2023.

9.2 Maintenance Functions

You can execute predefined actions by default to safeguard, improve, or monitor the functionality of the Marketing Efficiency Cloud. You can access the maintenance functions under > Administration > System Maintenance > Maintenance Functions:



Prerequisites

You have the right MANAGE_DATABASE_ADMINISTRATION.

Functions

> Attention
>
> Improper use of some actions can result in data loss! Always heed the functional description and use the maintenance functions carefully!

For a detailed description of the available functions, please note the description on the page > *Administration* > *System Maintenance* > *Maintenance Functions*.

To search for a specific function in the list, use the filter by category and the search field above the list.

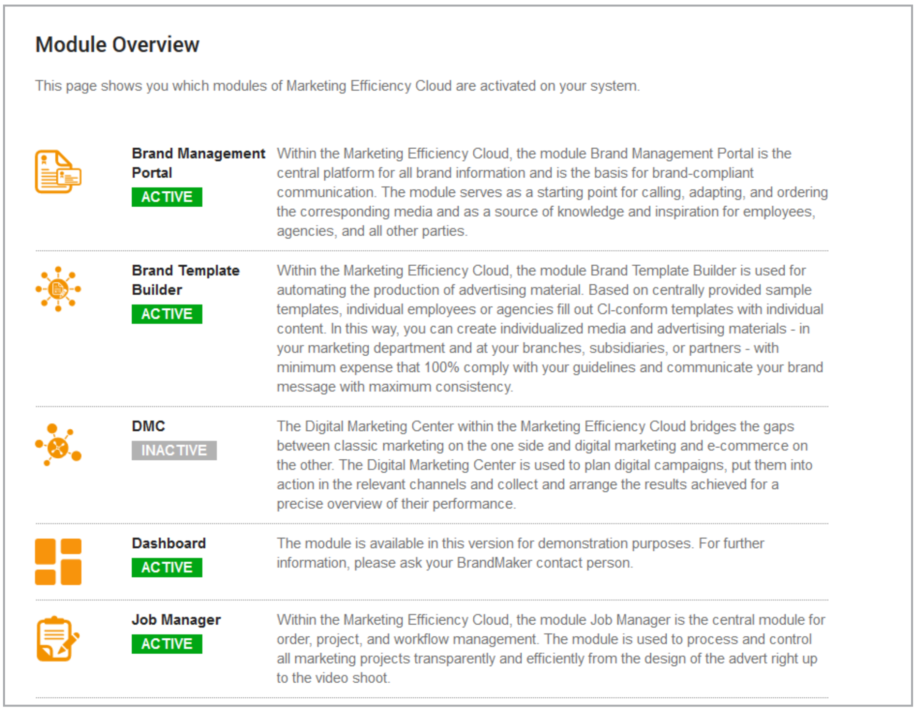
This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

10

System information

10.1 Module overview

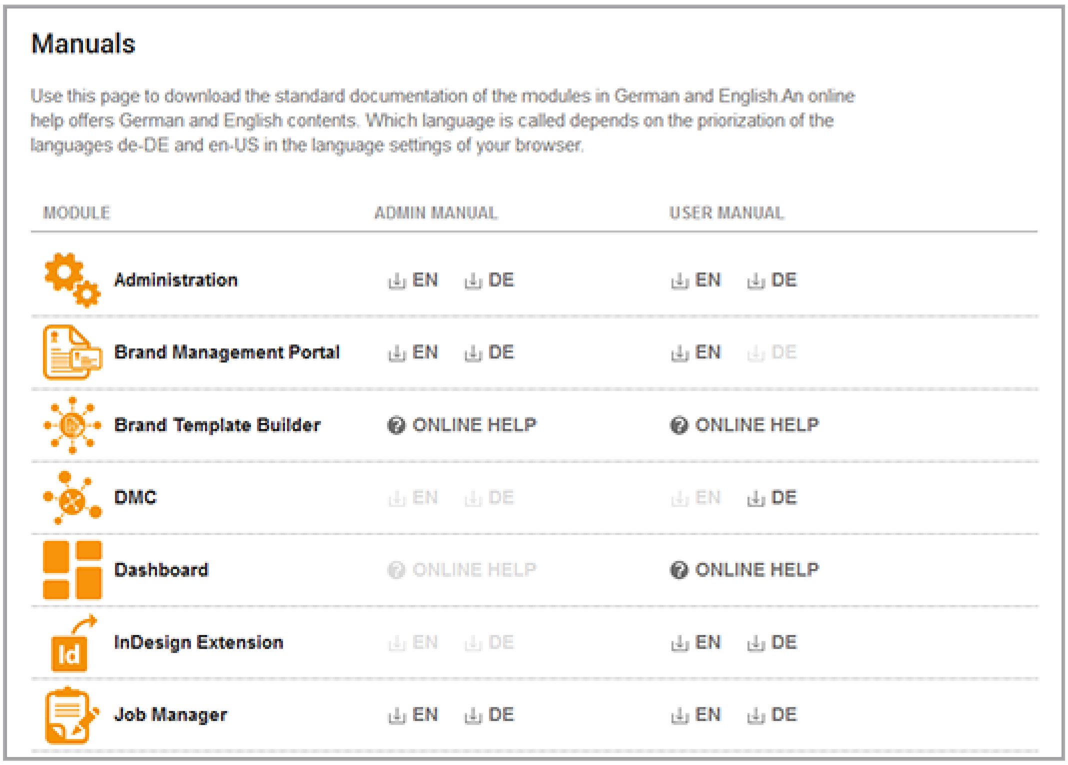
The page > *Administration* > *System Info* > *Module Overview* displays which Marketing Efficiency Cloud modules are activated in your system. Note that the activation of the modules can only be changed by BrandMaker.



10.2 Manuals and API descriptions

From the page > *Administration* > *System Info* > *Manuals*, you can access the standard documentation for the modules in German and English. The manuals describe the modules in the your version of the system. Note that some of the links lead to external sites.

Click *EN* for the English and *DE* for the German manual in PDF format. If *Online Help* is entered in the table, you can click to access a help with German and English contents. Which language is called depends on the prioritization of the languages de-DE and en-US in the language settings of your browser.



Manuals

Use this page to download the standard documentation of the modules in German and English An online help offers German and English contents. Which language is called depends on the priorization of the languages de-DE and en-US in the language settings of your browser.

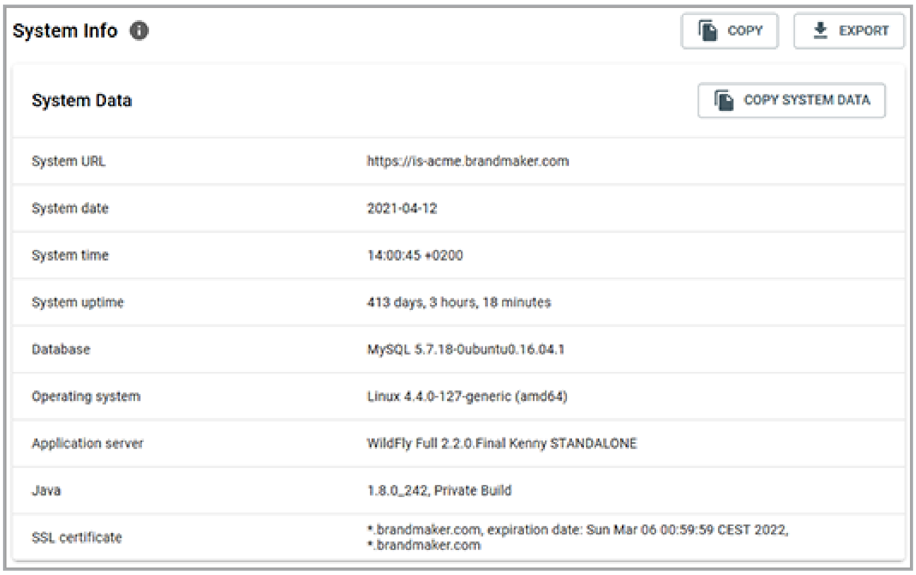
MODULE	ADMIN MANUAL	USER MANUAL
Administration	EN DE	EN DE
Brand Management Portal	EN DE	EN DE
Brand Template Builder	ONLINE HELP	ONLINE HELP
DMC	EN DE	EN DE
Dashboard	ONLINE HELP	ONLINE HELP
InDesign Extension	EN DE	EN DE
Job Manager	EN DE	EN DE

API descriptions are available on our BrandMaker developer portal.

10.3 System information

The page > *Administration* > *System Info* > *System Info* provides a list of the main data for your system. This data is required in the event of an update or an error, for example.

Choose *Export* if you want to export the information to a PDF.



10.4 Reports and statistics

You can use the functions provided under *> Administration > System Info* to create various reports and statistics. For example, you can:

- determine the number of documents created per template,
- determine the number of documents created per organizational unit,
- determine the number of uploads and downloads per organizational unit,
- create a list of all customized documents,
- create a list of the ten most frequently used assets ("Top 10") in documents,
- check the size of individual virtual databases.

10.4.1 Assessing user activity

Click > *> Administration > System Info > User Activity*, for example, to display a table overview of the number of logins based on different time intervals or of the users currently logged in.

Prerequisites

You have the right SHOW_USER_ACTIVITY.

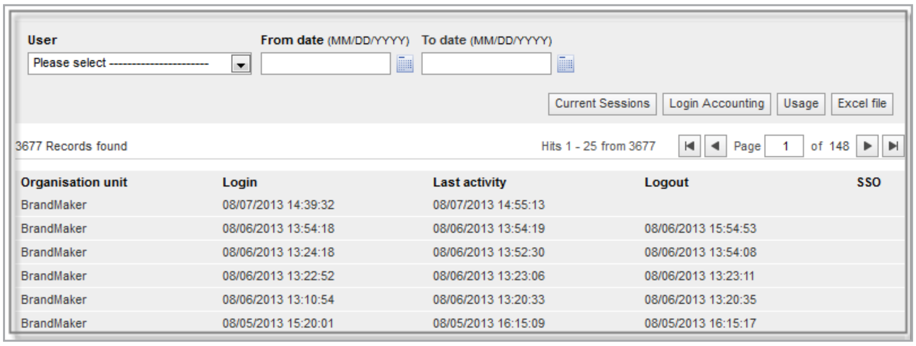
Depending on the report, the table overview of user activities consists of the following columns:

- Login (user name)
- Name (first name and last name)
- Organizational unit
- Login
- Last activity
- Logout
- SSO
- *IP*
- Time to timeout

> **Note**
>
> You can use the system setting "brandmaker.privacy_mode" to define whether the columns *Login*, *IP*, and *Name* are displayed in the table overview. Set the value to "false" to display the column in question.

You can carry out the following additional reports:

- Current Sessions: This creates an overview of all the users who are currently logged in.
- Login Accounting: This creates an overview of the total number of logins. You can restrict the hit list by selecting a user or timeline.
- Usage: This creates an overview of the total number of logins and the average login time. You can define a time period for the report.
- Excel file: This exports the report that you have just created as a CSV file.

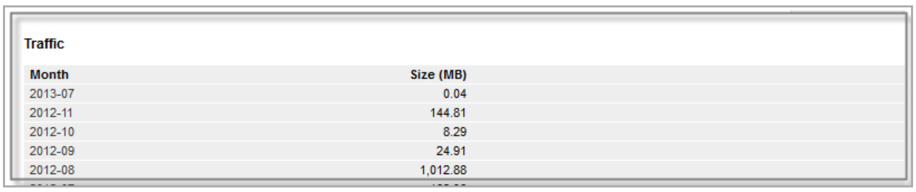


10.4.2 Assessing the monthly data traffic

You can assess the monthly data volumes in the Marketing Efficiency Cloud. Choose > Administration > System Info > Traffic to view a report about the monthly data traffic and the overall data volume. If you click a month, you can view the report for the daily data traffic and data volume. After you click a day, the actions on this day are displayed. When you choose the *Back* button, you are brought to the next level up.

Prerequisites

You have the right SHOW_TRAFFIC.



10.5 Other statistics

Choose > *Administration* > *System Info* > *Other Statistics* to generate a detailed report about typical frequently required application areas. You can produce statistics for the Media Pool, Brand Template Builder, and Marketing Shop modules and the Configuration area. You can export the created reports as CSV files.

Prerequisites

You have the right SHOW_OTHER_STATISTICS.

Note

The statistics can be modified and supplemented to suit the requirements of individual customers. If you have any additional questions, contact your BrandMaker contact person.

10.5.1 Media Pool statistics

Activate the *Media Pool* checkbox. Choose *Show list* to select from the available reports. After selecting a statistic, choose *Show selected statistics*.

Note

Choose *Show list* to update the list of reports that can be selected after activating an additional checkbox.

- *Size of all VDBs*: The table overview displays the VDBs and their size (MB).
- *List of all media objects with at least one ISIN*: The table overview displays asset IDs and ISINs.
- *Number of downloads per organization unit*: The table overview displays the organizational units and number of downloads.
- *Number of uploads per organization unit*: The table overview displays the organizational units and number of uploads.
- *Number of downloads per media object*: The table overview displays the asset, asset ID, and number of downloads.
- *List of all DTP files (qxp, indd, doc, and pdf)*: The table overview displays fields for the asset ID, title, item number, category, configurable text field 1, configurable text field 2, last uploaded, last changed, and file type.

- *List of all non-DTP files (not qxp, indd, doc, or pdf)*: The table overview displays fields for the asset ID, title, item number, category, configurable text field 1, configurable text field 2, last uploaded, last changed, and file type.
- *List of all downloads*: The table overview displays the asset ID, title, item number, file type, organizational unit, login, and date. You can restrict the report by selecting a time range or by entering a time period (date).

10.5.2 Brand Template Builder statistics

Activate the *Brand Template Builder* checkbox. Choose *Show list* to select from the available reports. After selecting a statistic, choose *Show selected statistics*.

> **Note**
>
> Choose *Show list* to update the list of reports that can be selected after activating an additional checkbox.

- *Number of print orders per engagement number*: The table overview displays the internal engagement numbers and number of print orders. Only approved and finalized documents are counted. Note that each document is only counted once, even if multiple orders have been sent for each document.
- *Number of printed copies per engagement number*: The table overview displays the internal engagement numbers and number of printed copies. Only approved and finalized documents are counted. Note only the last number sent for each document is counted, even if multiple orders have been sent for each document.
- *Number of documents created per organizational unit*: The table overview displays the organizational units and number of documents created. Only approved and finalized documents are counted.
- *Number of documents created per template*: The table overview displays the templates and number of documents created. Approved and finalized documents and documents that are still in progress and in the approval stage are included. Test documents that have been created in the template wizard are not included.
- *Number of print orders per organizational unit*: The table overview displays the organizational units and number of print orders. Only approved and finalized documents are counted. Note that each document is only counted once, even if multiple orders have been sent for each document.

- *Number of printed copies per organizational unit*: The table overview displays the organizational units and number of printed copies. Only approved and finalized documents are counted. Note only the last number sent for each document is counted, even if multiple orders have been sent for each document.
- *Number of print orders per printing agency*: The table overview displays the print agencies and number of print jobs. Only approved and finalized documents are counted. Note that each document is only counted once, even if multiple orders have been sent for each document.
- *Number of printed copies per printing agency*: The table overview displays the print agencies and number of print orders. Only approved and finalized documents are counted. Note only the last number sent for each document is counted, even if multiple orders have been sent for each document.
- *List of all personalized documents*: The table overview displays the title, affiliate ID, and document ID. You can restrict the report by selecting a time range or by entering a time period (date). Documents that are in progress and in the approval stage are not taken into account.
- *List of all finalized templates*: The table overview displays the title, template ID, the asset ID used as a basis, the category, the format, and the type. Documents that are in progress and in the approval stage and HTML templates are not taken into account.
- *10 topmost used media in documents*: The table overview displays the asset ID, asset version, asset title, and number of usages.
- *10 topmost used media in templates*: The table overview displays the asset ID, asset version, asset title, and number of usages.
- *Number of templates using the FCK editor*: The table shows all of the editor configurations and the number of templates that use these configurations in at least one variable.
- *Templates using the FCK editor*: For each editor configuration, the table displays a list of the template IDs that use this configuration in at least one variable.

10.5.3 Administration statistics

Activate the *Configuration* checkbox. Choose *Show list* to select from the available reports. After selecting a statistic, choose *Show selected statistics*.

> Note
>
> Choose *Show list* to update the list of reports that can be selected after activating an additional checkbox.

- *Number of logins per organization unit*: The table overview displays the organizational units and number of logins.

10.5.4 Marketing Shop statistics

Activate the *Shop* checkbox. Choose *Show list* to select from the available reports. After selecting a statistic, choose *Show selected statistics*.

> Note
>
> Choose *Show list* to update the list of reports that can be selected after activating an additional checkbox.

- *List of all Shop users* The table overview displays the user ID, login, name, e-mail, gender, role, and title.
- *List of all Shop orders*: The table overview displays the order ID and order number.
- *List of all conflicting Shop items*: The table overview displays the item ID, item description, item number, and created-on date.
- *Number of Shop orders*: The table overview displays the print agency and number of Shop orders.

Appendix 11

11.1 Rights

This chapter provides descriptions of the relevant rights.

11.1.1 Administration

11.1.1.1 User area

Name	Description	Notes
EDIT_MY_DATA	Users can call and change the > *Your user name* > *Settings* area by clicking the user name.	
MANAGE_OWN_START_ MODULE	The user can define the start module that is launched automatically after logging on in the *Your user name* > *Settings* area.	The user also requires the rights *EDIT_MY_ DATA*.
MANAGE_OWN_ AFFILIATE	From the *Your user name* > *Edit affiliate* area, the user can change the assignment to an affiliate if several affiliates are assigned to the user.	
PUBLISH_DISTRIBUTION_ LISTS	The user can share his or her distribution list.	
DELETE_ANY_ DISTRIBUTION_LIST	The user can also delete third-party distribution lists.	Note that each user can delete their own distribution lists.

Rights for substitutes

Note that users who are selected as substitutes must have the appropriate authorizations in the *Media Pool* and *Brand Template Builder* modules:

- Media Pool: MODULE_ACCESS, APPROVE_MEDIA
- Brand Template Builder: MODULE_ACCESS, APPROVE_ADVERT_INSTANCES, APPROVE_ADVERT_TEMPLATES

11.1.1.2 Administration area

Name	Description	Notes
ADD_THEME	The user can create new themes.	The right *MANAGE_ THEME_TREE* is also required to access the theme tree.
APPLICATION_CONFIGURATION_BASIC	The user can call and view the following menu items: *> Administration > System Configuration > System Settings*: The user can change the system settings. *> Administration > System Info > Module Overview* *> Administration > System Info > System Info*	The user can only see rights that are assigned to the setting BASIC.
ASSIGN_USER_GROUPS	The user can call the *> Administration > Users & Groups > Manage User Assignment* menu item and assign users to a user group or remove them from a user group.	

Name	Description	Notes
CREATE_USER_GROUPS	The user can call the *> Administration > Users & Groups > Manage User Groups* menu item and create a new user group and rename or delete an existing user group.	
IN_LOGIN_APPROVER_LIST	Users with this right are listed as internal contact persons when an account is requested by an external user.	The right *MANAGE_ LOGIN_REQUESTS* is required to edit user requests.
LOGIN_AS_USER	Users with this right can call the *Login as this user* function from *> Administration > Users & Groups > Users*. If the checkbox *Login as this user* is activated for a user profile, users with the right LOGIN_AS_USER can log in as this user without being prompted for a password.	
MANAGE_ACCOUNT_APPROVALS	The user can call the *> Administration > Approvals > User Accounts* menu item and edit, approve, and manage user requests.	

Name	Description	Notes
MANAGE_ACCOUNT_APPROVALS_OWN_ORG	The user can call the > *Administration > Approvals > User Accounts* menu item and edit, approve, and manage user account requests in his or her own organizational units and lower-level organizational units.	
MANAGE_ACCOUNT_REGISTRATION	The user can call the > *Administration> Users & Groups > Account Registration* menu item and manage the account registration forms. The user can call and edit the menu item > *Administration > Users & Groups > Password Blacklist*.	
MANAGE_AFFILIATES	The user can call the > *Administration > Data Structures & Workflows > Custom Objects & Structures > Affiliate Structures* menu item and edit objects with a custom structure that is assigned to an affiliate structure.	

Name	Description	Notes
MANAGE_CELL_STYLES	The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Cell Styles* menu item and manage and create cell styles. The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Extract Styles* menu item and extract styles.	
MANAGE_CHARACTER_STYLES	The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Character Styles* menu item and manage and create character styles. The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Extract Styles* menu item and extract styles.	
MANAGE_COLORS	The user can call the > *Administration > System Configuration > Rich Text Editor > Colors* menu item and manage colors.	

Name	Description	Notes
MANAGE_COMPANY_CALENDAR	The user can access the menu item > *Administration* > *Users & Groups* > *Company Vacations and Public Holidays* and is allowed to create, import and manage calendars on that page.	
MANAGE_CONTACT_INFO	The user can create the contact page for the first time by clicking > *Support* in the top information area. To change an existing contact page, you have to go to > *Administration* > *System Configuration* > *Text Changes*, export and edit it, and then import it back into the system.	
MANAGE_CONTEXT_HELP	The user can edit context help.	The right *MANAGE_RELATED_LINKS* is also required.
MANAGE_CUSTOM_OBJECTS	The user can open the > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects* menu item. The user can create new objects and edit existing ones.	

Name	Description	Notes
MANAGE_CUSTOM_STRUCTURES	The user can open the > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Structures* menu item. The user can create new structures and edit existing ones.	
MANAGE_CUSTOM_TEMPLATE_PROPERTIES	The user reaches > *Administration* > *Brand Templates* > *Custom Properties* and can edit the page.	
MANAGE_CUSTOM_WATERMARK	The user can access the area > *Administration* > *Assets* > *Download* > *Visual Watermark* and use all of the functions on this page.	
MANAGE_DATABASE_ADMINISTRATION	The user can call the > *Administration* > *System Maintenance* > *Maintenance Functions* menu item and correct asset versions or update PDF links, for example.	
MANAGE_DATASHEET_LAYOUT	The user can call the > *Administration* > *Data-sheet Engine* > *Datasheet Layout* menu item and place or edit variables on a datasheet.	

Name	Description	Notes
MANAGE_DEFAULT_TYPES	The user can call the > *Administration* > *Data-sheet Engine* > *Default Type* menu item and specify the types that are predefined as the default for new data objects and jobs for Marketing Data Hub and Job Manager.	
MANAGE_DETAILED_VIEW	The user can call the > *Administration* > *Assets* > *Detailed View* menu item and configure the detailed views for assets.	
MANAGE_DOCUMENT_CREATION_PROPERTIES	The user reaches > *Administration* > *Brand Templates* > *Document creation* and can edit the page.	
MANAGE_DOCUMENT_SIZES	The user can access > *Administration* > *Brand Templates* > *Document Formats* and create, change, and delete document formats.	
MANAGE_DOWNLOAD_SCHEMES	The user can call the > *Administration* > *Assets* > *Download* > *Download Schemes* menu item and edit existing download schemes or create new ones.	

Name	Description	Notes
MANAGE_CONTENT_SERVICES	The user can call the > *Administration > Brand Templates > Content Services* menu item and edit existing content services or create new ones.	
MANAGE_EDITOR_CONFIGURATION	The user can open the > *Administration > System Configuration > Rich Text Editor > Configuration* menu item and create and edit editor configurations.	
MANAGE_EDITOR_PRESETS	The user can open the > *Administration > Brand Templates > Editor Settings* menu item and edit the settings made in Brand Template Builder for the document editor and custom-izing wizard, as well as create new editor settings.	
MANAGE_EMAIL_NOTIFICATION	The user can call the > *Administration > Data-sheet Engine > Workflow Messages* menu item and select variables with values that are to be sent automatically via e-mail when there is a workflow change.	
MANAGE_EMAIL_SERVICE	The user can call and edit the > *Administration > System Configuration > E-mail Service* page.	

Name	Description	Notes
MANAGE_EMAIL_TEMPLATES	The user can call and edit the > *Administration > Look & Feel > E-MailTemplates* page.	
MANAGE_FILE_EXTENSIONS	The user can call the > *Administration > Assets > File Formats* menu item and edit the list of supported file extensions.	
MANAGE_FREE_TEXT_FIELDS	The user can call the > *Administration > Assets > Custom Text Fields* menu item and create and edit free text fields. With free text fields, you can create and display additional inform-ation for the detailed view of an asset.	
MANAGE_FUSION_APPS	The user can call and edit the pages under > *Administration > Fusion > UX Logic*.	
MANAGE_GENERAL_TERMS_AND_CONDITIONS	The user can call the > *Administration > Users & Groups > GTC Settings* menu item and create and edit the general terms and conditions for various languages.	The system setting General terms and condi-tions must be set to activ-ated for the path > *Terms & Conditions* to be visible.
MANAGE_JOBS	The user can call the > *Administration > Data-sheet Engine > Other Settings > Job Manager* menu item and edit the page.	

Name	Description	Notes
MANAGE_IMPORT_EXPORT_CS_CO	The user can export and import custom objects and structures.	
MANAGE_KEYWORDS_APPROVALS	The user can open the > *Administration > Approvals > Keywords* menu item and manage keywords.	
MANAGE_LICENSES	The user can call the > *Administration > Assets > Asset Licenses* menu item and create and edit licenses.	
MANAGE_MAINTENANCE_MESSAGE	The user can call the > *Administration > System Maintenance > Maintenance Notification* menu item and create and edit maintenance notifications.	
MANAGE_MANUALS	The user can call the *Administration > System Info > Manuals* menu item and download documentation.	
MANAGE_MEDIA_LIST_VIEW	The user can open and use the > *Administration > Assets > List View* menu item.	The configured settings are applied to all users.
MANAGE_MODULE_NAMES	The user can call and edit the page > *Administration > Look & Feel > Application and Module Names.*	

Name	Description	Notes
MANAGE_OBJECT_NUMBERS	The user can call the > *Administration* > *Data-sheet Engine* > *Object ID* menu item and edit the object ID formats.	
MANAGE_MODULE_NAVIGATION	The user can call the > *Administration* > *Look & Feel* > *Navigation* menu item and define the order of and links to modules in the top navigation, among other things.	
MANAGE_MP_SEARCH_CONFIGURATON	The user can access the > *Administration* > *Assets* > *Search Configuration* > *Search Index* and > *Default Views* and configure and manage the search function in the Media Pool.	
MANAGE_ORGANIZATIONAL_UNIT	The user can open the > *Administration* > *Users & Groups* > *Organizational Units* menu item and create and edit organizational units.	
MANAGE_OUTPUT_METHODS	The user can call the > *Administration* > *Brand Templates* > *Output Methods* menu item and rename the output methods created in the system.	

Name	Description	Notes
MANAGE_OWN_ORG	The user can open the > *Administration > Users & Groups > Organizational Units* menu item and edit his or her own organizational units and lower-level organizational units.	
MANAGE_PARAGRAPH_STYLES	The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Paragraph Styles* menu item and manage and create paragraph styles. The user can call the > *Administration > System Configuration > Rich Text Editor > Styles > Extract Styles* menu item and extract styles.	
MANAGE_PASSWORD_BLACKLIST	The user can call the > *Administration > Users & Groups > Password Blacklist* menu item and edit the blacklist (by adding or removing pass-words).	
MANAGE_PRICE_LISTS	The user can call the > *Administration > Data Structures & Workflows > Price Lists* menu item and manage price lists for advertising material production or for Shop items.	

Name	Description	Notes
MANAGE_PRINT_AGENCIES	The user can call the > *Administration > Brand Templates > Printers* menu item and manage the print agencies stored in the system or create new ones.	
MANAGE_PRODUCTS	The user can call the > *Administration > Data-sheet Engine > Other Settings > Data Hub* menu item and edit the page.	
MANAGE_RELATED_LINKS	The user can call and edit the functions that can be accessed with the *Service* button. For example, the right lets you switch to edit mode in the *Smart Access* module and edit the service links and the links for the context help.	
MANAGE_ROLES	The user can call the > *Administration > Users & Groups > Rights & Roles* menu item and create a new role, add rights to a role, or remove rights.	
MANAGE_SAML_CONFIGURATION	The user can call the > *Administration > System Configuration > Single Sign-On / SAML* menu item and edit the SAML configurations.	
MANAGE_SERVICE_MENU	The user can access > *Administration > System Configuration > Service Menu*.	

Name	Description	Notes
MANAGE_SKIN	The user can call the > *Administration* > *Look & Feel* > *Skinning* menu item and edit the skinning on this page.	
MANAGE_SSO_GROUPS	The user can call the > *Administration* > *Users & Groups* > *Single Sign-On Groups* menu item and edit and create SSO groups.	
MANAGE_SYSTEM_MESSAGES	The user can call the > *Administration* > *System Maintenance* > *User Messages* menu item and create and send system messages.	
MANAGE_TABLE_STYLES	The user can call the > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Table Styles* menu item and manage and create table styles. The user can call the > *Administration* > *System Configuration* > *Rich Text Editor* > *Styles* > *Extract Styles* menu item and extract styles.	
MANAGE_TASK_TEMPLATES	Users can call and use the > *Administration* > *Datasheet Engine* > *Task Templates* function in the administration area.	

Name	Description	Notes
MANAGE_THEMES_APPROVALS	The user can call the > *Administration > Approvals > Themes* menu item and manage theme requests.	To create new themes, the user also requires the right *ADD_THEME*.
MANAGE_THEME_TREE	The user can call the > *Administration > Data Structures & Workflows > Theme Tree* menu item and manage existing themes.	To create new themes, the user also requires the right *ADD_THEME*.
MANAGE_TYPE_CATEGORIES	The user can call the > *Administration > Data-sheet Engine > Type Categories* menu item and use existing types.	
MANAGE_TYPE_CONFIGURATION	The user can call the > *Administration > Data-sheet Engine > Assign Workflows* menu item and link types to workflows.	
MANAGE_TYPES	The user can call the > *Administration > Data-sheet Engine > Types* menu item to create new types and edit existing types.	
MANAGE_UI_LANGUAGES	The user can call and edit the > *Administration > Look & Feel > Interface Languages* page.	

Name	Description	Notes
MANAGE_USER	The user can call the > *Administration* > *Users & Groups* > *Users* menu item and access the user administration. He or she can create new users and edit existing users. The user can edit responsibility areas.	
MANAGE_USER_OWN_ORG	The user can call the > *Administration* > *Users & Groups* > *Users* menu item and access the user administration. The right allows the user only to edit users from their own organ-izational unit. New users cannot be created with this right.	
MANAGE_VALID_FONTS	The user can call the > *Administration* > *Assets* > *Manage Font Whitelist* menu item and edit the list of valid fonts.	
MANAGE_VARIABLE_ACCESS_AND_RIGHTS	The user can access the > *Administration* > *Datasheet Engine* > *Variables Access Rights* menu item and define the access for each workflow step.	

Name	Description	Notes
MANAGE_VARIABLES	The user can call the > *Administration > Data-sheet Engine > Variables* menu item and edit the variables created for a type or create new variables.	
MANAGE_VDB_GROUPS	The user can call the > *Administration > Data Structures & Workflows > Virtual Database Groups* menu item and create new VDB groups or edit existing ones.	
MANAGE_VIDEO_TRANSCODING	The user can call the > *Administration > System Maintenance > Video Transcoding* menu item. The user can cancel active transcodings, restart failed transcodings and download the asset of a successfully completed transcoding.	
MANAGE_VIRTUAL_DATABASES	The user can call the > *Administration > Data Structures & Workflows > Virtual Databases* menu item and create a new VDB or delete existing VDBs.	
MANAGE_W2P_SEARCH_CONFIGURATION	The user reaches > *Administration > Brand Templates > Search Configuration* and can edit the page.	

Name	Description	Notes
MANAGE_WEB_PUBLISHING	The user can call the > *Administration* > *Assets* > *External Service* menu item and configure the publication of the asset types that exist in the system.	
MANAGE_WELCOME_PAGE	If you have any questions about this right, please contact your system administrator.	
MANAGE_WORKFLOWS	The user can call the > *Administration* > *Data Structures & Workflows* > *Workflows* menu item and create new workflows and edit existing ones.	
MIGRATE_TYPES	Due to numerous changes in Types, administrators are required to migrate Types for each system upgraded to 7.3. The page > *Administration* > *Datasheet Engine* > *Maintenance* > *Migrate Types* displays the list of types and configurations that need to be migrated.	New administration page: *Datasheet Engine*> *Maintenance*. Mandatory type migration after an update. See Job Manager Administration Guide for details.
MODULE_ACCESS	The user can access > *Administration*.	The user always requires this right to access a module.

Name	Description	Notes
PUBLISH_DSE_CHANGES	The user can call the > *Administration > Data-sheet Engine > Publish Changes* menu item and publish changes.	
SEE_MODULE_NAVIGATION	The navigation bar is displayed for the user.	
SEE_ALL_PERSONAL_DATA	The user sees not only the first and last names of other users, but also other personal data, for example e-mail address or organizational unit	This right facilitates the visibility of personal data. Therefore, only assign it to the necessary and appropriately trained users.
SHOW_OTHER_STATISTICS	The user can call the > *Administration > System Info > Other Statistics* menu item and produce reports for the different modules.	
SELECT_COMPANY_CALENDAR	In *User Settings*, users can view the *Absences* page and access calendars that are displayed company-wide or for specific user groups only.	
SHOW_TRAFFIC	The user can call the > *Administration > System Info > Traffic* menu item and view the monthly data volume for the system.	
SHOW_USER_ACTIVITY	The user can call the > *Administration > System Info > User Activity* menu item.	

The following right is visible under > *Administration* > *Users & Groups* > *Rights & Roles*, but its assignment to a role has no functional effect:

- MANAGE_TEXT_ADAPTATIONS

11.1.2 Media Pool

The rights are listed and explained in the module administration manual.

11.1.3 Smart Access

<table>
<tr><th>Name</th><th>Description</th><th>Notes</th></tr>
<tr><td>MANAGE_ALL</td><td>The user can edit all times, regardless of their visibility.</td><td rowspan="2">Users with the rights MANAGE_ALL and MANAGE_OWN cannot maintain
Smart Access from the Service menu:
• Deactivate edit mode
• Import and Export
• Go to page
• Create new page
• Edit page options
• Copy current page
• Delete current page</td></tr>
<tr><td>MANAGE_OWN</td><td>The user can edit all visible tiles.</td></tr>
</table>

Name	Description	Notes
SEE_TILE_VIEW	The user can view the tiles on the Media Pool/Brand Template Builder start page and the navigation for Smart Access in the module navigation. A user who does not have this right cannot see Smart Access in the module navigation but can call Smart Access using a link.	There is no MODULE_ACCESS right for Smart Access. To be able to access Smart Access, the user must have all three rights.
SEE_MEDIA_POOL_TILE_VIEW	The user can see the tiles on the Media Pool start page.	
SEE_WEB_2_PRINT_TILE_VIEW	The user can see the tiles on the Brand Template Builder start page.	

11.1.4 Brand Template Builder

The rights are listed and explained in the module administration manual.

11.1.5 Marketing Shop

Name	Description	Notes
SHOP_ADVANCED_SEARCH	The user can see the *Advanced search* tab and can access it.	
SHOP_BROWSE	The user can access the start page of the Shop module on the navigation bars, the teasers and the search function.	

Name	Description	Notes
SHOP_CATALOGUE_MANAGE	Under > *Shop* > *Content*, the user can access the > *Catalog* and > *Catalog groups* areas.	The URL of the item becomes visible.
SHOP_CHOOSE_LATER_W2P_INDIVIDUALIZATION	The user can decide whether a template in *Brand Template Builder* module that is placed in the shopping cart will be customized immediately or later. Without this right, the item is opened directly in the customizing wizard without further prompts.	
SHOP_CMS_CONTENT	A menu button is displayed for the user. The user can add CMS content, edit content, and delete content.	
SHOP_CONTENT_MANAGE	Under > *Shop* > *Content*, the user can call and use the > *Teaser*, > *Theme page*, > *Order lists*, > *Categories*, and > *Filters* areas.	The URL of the item becomes visible.
SHOP_EDIT_PRINT_TEXT	The user can change the name of a PDF export schema if the *Editable headline text* checkbox is enabled for the selected PDF export schema.	
SHOP_EQUIPMENT_REPORTS	From the > *Shop* > *Statistics* area, the user can create a report about the maintenance and reservation of equipment and download it as a CSV file.	
SHOP_EVENT_BOOK_FOR_AFFILIATE	The user can make bookings (or view and cancel bookings) for other users that belong to the affiliate that is currently active for him or her.	
SHOP_EVENT_BOOK_FOR_ORG_UNIT	The user can make bookings (or view and cancel bookings) for other users that belong to the same organizational unit.	
SHOP_EVENT_BOOK_FOR_INTERNAL	This right contains the two rights above in full. The user can make bookings (or view and cancel bookings) for all system users, regardless of whether they are flagged as internal or external.	

Name	Description	Notes
SHOP_EVENT_BOOK_FOR_EXTERNAL	The user can make bookings (or view and cancel bookings) for other people that are not registered as users in the system by specifying their name and e-mail address.	
SHOP_GLOBAL_SETTINGS_MANAGE	The user can call the *> Shop > Settings* area and use the functions grouped under it (e.g. *> Custom Fields*, *> Item types*, *> Delivery states*, or *> Statistics mailing*).	
SHOP_INTERFACE_EMAILS_RECEIVER	The user receives the e-mails sent via the Marketing Shop module concerning the interface.	
SHOP_LOGIN	The user can log into the Marketing Shop module and access the module.	Each user that is to use the Marketing Shop module requires this right.
SHOP_MANAGE_CONFIG_ITEM_EDITOR_PAGE	The user can access *> Shop > Settings > Item administration* and add new entries or edit existing entries.	
SHOP_MANAGE_COUNTRIES	The user can call *> Shop > Settings > Countries* and add new entries or edit existing entries.	
SHOP_MANAGE_CURRENCIES	The user can call *> Shop > Settings > Currencies* and add new entries or edit existing entries.	
SHOP_ORDER_ARCHIVE	The user can archive orders.	One of the following rights is also required: SHOP_ORDER_MANAGE_XXX

Name	Description	Notes
SHOP_ORDER_ HAPTIC_ANY_QTY	The user can order haptic items in one piece or in a quantity independent of the package size and packing unit.	This is used only if the system setting order_in_ pieces = true is set. For more information, please contact your system administrator. The user also requires a right for ordering (shopping cart).
SHOP_ORDER_ MANAGE_ALL	The user can call the order history and edit orders of all ordering parties and all vendors.	This right overwrites other SHOP_ORDER_ MANAGE rights.
SHOP_ORDER_ MANAGE_AFFILIATE	The user can call the order history and edit all orders of his own affiliate.	This right enhances other SHOP_ORDER_ MANAGE rights.
SHOP_ORDER_ MANAGE_OWN	The user can display his or her own orders in the order overview. The status cannot be edited.	This right enhances other SHOP_ORDER_ MANAGE rights.
SHOP_ORDER_ MANAGE_SUPPLIER	The user can call the order overview and see all the orders that have gone to the user's own supplier. If a supplier is not assigned to his or her user account, the user does not see any orders.	This right enhances other SHOP_ORDER_ MANAGE rights.
SHOP_ORDER_ MANAGE_ORGUNIT	If the shopping cart is configured so that a user on a higher level in the hierarchy has to approve the shopping cart, the user on the higher level in the hierarchy must have this right. With this right, the user can call the order history and edit all orders in his or her own organizational unit.	This right enhances other SHOP_ORDER_ MANAGE rights.
SHOP_PRINTING_ SCHEMA_MANAGE	The user can call the function > *Shop* > *Content* > *PDF export schema* function and define how and with what attributes an item list can be printed.	

Name	Description	Notes
SHOP_PRODUCT_ APPROVE	The user can approve an item for the Marketing Shop module.	The user also requires one of the SHOP_ PRODUCT_ MANAGE_XXX rights.
SHOP_PRODUCT_ DELETE	The user can delete all items that he can access.	Deleting means archiving here. Items are not deleted. The user has read-access to archived items through *> Shop > Items > Administration filter > Archive*.
SHOP_PRODUCT_ MANAGE_ALL	The user can call *> Shop > Items* and access the item conflict list from there. The user can create new items.	
SHOP_PRODUCT_ MANAGE_OWN	The user can call *> Shop > Items* and access the item conflict list from there. Users can edit items in their catalog list. If the user is assigned to a supplier, the user can only edit the data of this supplier for the item.	If an item is delivered by multiple suppliers, users with this right can view only the supplier fields for their own supplier and the general system fields. Furthermore, only their own items are visible.
SHOP_PRODUCT_ STATISTIC_VIEW	Under *> Shop > Statistics*, the user has access to the reports *> Download*, *> Search*, *> Synchronization*, and *> Orders*.	
SHOP_RATING_ MANAGE_OWN	The user can rate an item.	To rate an item, the rating function must be activ- ated for the item.
SHOP_RATING_ STATISTIC	The user can see the available item ratings under *> Shop > Statistics*.	

Name	Description	Notes
SHOP_RECEIPT_ MANAGE	From the > *Shop* > *Items* area, the user can call the > *Goods receipt* > *Expected items* menu item. Items that will be delivered soon are displayed.	The user requires one of the SHOP_PRODUCT_ MANAGE_XXX rights.
SHOP_SEE_ACCOUNT_ INFO_ORDER	The user can view payment and billing information (e.g. the account number or bank code) for the orders that he or she can access.	
SHOP_ SHOPPINGCART_ APPROVE	The user can approve an order.	The user also requires the right SHOP_ SHOPPINGCART_ SEE_PENDING.
SHOP_ SHOPPINGCART_ ORDER	The user can submit their own orders.	This right overrides the right SHOPPINGCART_ REQUEST.
SHOP_ SHOPPINGCART_ REQUEST	The user can request an order for approval, but cannot approve it himself.	This right is overridden by the right SHOP_ SHOPPINGCART_ ORDER.

Name	Description	Notes
SHOP_ SHOPPINGCART_SEE_ PENDING	The user can view orders or shopping carts that have been requested or rejected via the order archive. Users with this right cannot order shopping carts (the right SHOPPING_CART_ORDER is required to order them). To call other functions from the overview (for example, to approve orders from the overview or change an order status), additional rights are required. The right SHOP_SHOPPINGCART_ SEE_PENDING can be combined with other rights as follows: • With SHOP_SHOPPINGCART_ REQUEST, without SHOPPINGCART_ORDER: Users can view their own requests that have not been approved and rejected yet. • With SHOP_SHOPPINGCART_ APPROVE: Users can view requests that they are to approve.	This right is recommended for the following roles: Administrators, approvers, requestors.
SHOP_ SHOPPINGCART_ TRANSFER	The user can use the *Transfer cart* function to transfer full shopping carts (including all of the necessary items) to other users.	
SHOP_SHOW_ ASSIGNED_SUPPLIER_ DETAILS	The user can call the *> Shop > Supplier* menu item. The user cannot create or edit a supplier; instead he or she can only call the detailed view of the existing suppliers that supply the items for the catalog group to whom the user is assigned.	
SHOP_STOCK_ MANAGE_ALL	The assignee can adjust the item stocks. To edit other item information, the SHOP_PRODUCT_MANAGE_ ALL right is required.	This right is overridden by the right SHOP_ PRODUCT_ MANAGE_ALL.

Name	Description	Notes
SHOP_STOCK_ MANAGE_OWN	The assignee can adjust the stocks of items of his own supplier.	This right is overridden by the right SHOP_ PRODUCT_ MANAGE_ALL.
SHOP_SUPPLIER_ MANAGE	The user can view and edit suppliers and add new suppliers.	
SHOP_ UNDERDELIVERY	The user can call the *Underdelivered* item conflict list via > *Shop* > *Items* in the left-hand navigation pane.	The user also requires one of the rights SHOP_ STOCK_ MANAGE_XXX or SHOP_PRODUCT_ MANAGE_XXX.
SHOP_USE_ NAVIGATION_TREE	In the Shop module, the user can see the left navigation bar, from which he or she can call items arranged by defined categories, for example.	This right has no effect on the left-hand navigation pane in > *Shop* > *Items*.
SHOP_WATCHLIST	The user can call the > *Shop* > *Favorites* area and use the functions displayed there.	

11.1.6 Marketing Planner

General rights

Name	Description	Notes
MODULE_ACCESS	The user can call the Marketing Planner module.	

Rights for the detailed view

Name	Description	Notes
MAPS_GENERAL_READ	The user can view the *General* tab but not edit it.	
MAPS_GENERAL_WRITE	The user can edit the *General* tab (that is, (add, change, or delete objects there) and comment the planning element.	
MAPS_TARGET_READ	The user can see the *Target Budget* tab, but cannot edit it.	
MAPS_TARGET_WRITE	The user can edit (add, modify or delete) the *Target Budget* tab.	
MAPS_MARKER_READ	The user can view markers but not edit them.	
MAPS_MARKER_WRITE	The user can edit markers (that is, add, change, or delete markers).	
MAPS_ELEMENT_ACTIVITY_STREAM	The user can access the activity stream in the detailed view on the *General* tab.	

Name	Description	Notes
MAPS_ELEMENT_ MANAGE_ WATCHER	The user can manage (add/remove) elements' watch-ers.	
MAPS_ ATTACHMENT_ READ	The user can view the *Attachments* tab but not edit it.	
MAPS_ ATTACHMENT_ WRITE	The user can edit the *Attachments* tab (that is, add, change, or delete attachments).	
MAPS_ SUNKCOST_READ	The user can view the *POs* tab but not edit it.	
MAPS_ SUNKCOST_ WRITE	The user can edit the *POs* tab (that is, add, change, or delete orders).	
MAPS_BILL_READ	The user can view the *Invoices* tab but not edit it.	
MAPS_BILL_ WRITE	The user can edit the *Invoices* tab (that is, add, change, or delete invoices).	

Name	Description	Notes
MAPS_MDF_ READ	The user can view the *MDF* tab but not edit it.	The system setting *enabledMDF = true* must also be set. For more information, please contact your system administrator.
MAPS_MDF_ WRITE	The user can edit the *MDF* tab (that is, add and request MDFs).	
MAPS_FEES_ READ	The user can see the *Fees* tab, but cannot edit it.	
MAPS_FEES_ WRITE	The user can edit the tab *Fees* (assign fees to the plan-ning element, edit or delete fees).	
MAPS_FEES_ OVERWRITE_ GLOBAL	The user can override globally set fees on an planning element.	
MAPS_TASK_ READ	The user can view the *Tasks* tab but not edit it.	
MAPS_TASK_ WRITE	The user can edit the *Tasks* tab (that is, add, change, or delete tasks).	
MAPS_JOB_ WRITE	The user can add jobs on the *Tasks* tab.	The user also requires the following rights in the Job Manager module: DSE_MODULE_ACCESS DSE_CREATE_JOB

Name	Description	Notes
MAPS_ DIMENSIONS_ READ	The user can view the *Dimensions* tab but not edit it.	
MAPS_ DIMENSIONS_ WRITE	The user can edit the *Dimensions* tab (that is, open or edit dimensions).	
MAPS_KPIS_ READ	The user can view the *KPIs* tab but not edit it.	
MAPS_KPIS_ WRITE	The user can edit the *KPIs* tab (that is, add, change, or delete KPIs).	

Rights for the calendar

Name	Description	Notes
MAPS_ELEMENT_ WRITE	The user can create the elements in the tree structure in the calendar.	
MAPS_ELEMENT_ COPY	The user can copy elements.	
MAPS_ELEMENT_ RELOCATE	The user can cut out and move elements.	

Name	Description	Notes
MAPS_ELEMENT_ DELETE	The user can delete elements.	Users that have the right MAPS_YEAR_WRITE can delete years and the elements that they contain.
MAPS_ELEMENT_ EXTERNAL_ RESOURCES	The user accesses the *Assign External Resource* function in the context menu of a planning element if a system whose resources are to be synchronized with the Marketing Planner has been specified in the system settings.	
MAPS_PERIOD_ READ	The user can view and copy timelines.	
MAPS_PERIOD_ WRITE	The user can create timelines, insert copied timelines and edit timelines.	

Rights for the budget

Name	Description	Notes
MAPS_BUDGET_READ	The user reaches the sub-area > *Planner* > *Budget* and can view values from the budget view.	
MAPS_BUDGET_WRITE	The user can add or change values in the budget.	To reach the sub-area > *Planner* > *Budget*, the user needs the right MAPS_ BUDGET_READ.

Name	Description	Notes
MAPS_MANAGE_LOCK_BUDGETS	The user can enable *Locking of Budgets* on the > *Planner* > *Settings* > *Budget Settings* page.	Furthermore, the user can edit the lock-ing of past periods.
MAPS_MANAGE_BUDGET_DEFAULT_VIEW	The user can define a default budget view for all users on the > *Planner* > *Settings* > *Budget Settings*page.	

Rights for tools

Name	Description	Notes
MAPS_IMPORT_ BUDGETRELEVANT_DATA	The user can import budget-related data under *Marketing Planner* > *Tools*.	
MAPS_CHANGE_LOG	The user can access > *Tools* > *Change log*.	This right should be reserved for administrators.

Global settings

The user reaches the *Settings* area as soon as the user role has at least one of the following rights. In this case, the user sees all subpages, but can edit only those for which the corresponding user role has been assigned the appropriate rights.

Bezeichnung	Description	Notes
MAPS_MANAGE_CATEGORIES	The user can edit the area > *Marketing Planner > Settings > Categories*.	
MAPS_MANAGE_CALENDAR_STRUCTURE	The user can edit the area > *Planner > Settings > Calendar*.	
MAPS_MANAGE_ELEMENT_TYPE	The user can edit the area > *Planner > Settings > Element Types.*	
MAPS_MANAGE_MARKER	The user can edit the area > *Planner > Settings > Markers*.	
MAPS_MANAGE_YEAR	The user can edit the area > *Marketing Planner > Settings > Years*.	
MAPS_MANAGE_KPIS	The user can edit the area > *Marketing Planner > Settings > KPIs*.	
MAPS_MANAGE_DIMENSIONS	The user can edit the area > *Marketing Planner > Settings > Dimensions*.	
MAPS_MANDATOR_SETTINGS_GENERAL	The user can change settings for the "bottom-up/top-down" functions.	
MAPS_MANAGE_EXCHANGE_RATES	The user can edit the area *Marketing Planner > Settings > Exchange Rate & Currencies*.	
MAPS_MANAGE_FEES	The user can edit the area > *Planner > Settings > Fees*.	

Rights for the My Account area

Name	Description	Notes
MAPS_MANAGE_GROUPS_WRITE	The user can create, edit, or delete user groups on the sub-pages from > *Planner > Users*.	
MAPS_MANAGE_GROUPS_TO_ USERS	The user can edit the assignment of users to groups under > *Planner > Users > Groups and Roles*.	

Name	Description	Notes
MAPS_MANAGE_GROUPS_TO_DIMENSIONS	The user can edit groups' access to dimensions: • Under > *Planner* > *Settings* > *Dimensions* in the dialogs *Add dimension* and *Edit dimension* in the *Access Rights* area • Under > *Planner* > *Users* > *Dimension Access*	This right includes the right MAPS_MANAGE_DIMENSIONS_WRITE.
MAPS_MANAGE_GROUPS_TO_NODE	The user can edit groups' access to planning elements: • In the detailed view of the *General* tab in the *Group* area • Under > *Planner* > *Users* > *Element Access*	
MAPS_MANAGE_APPROVERS	The user can edit the area > *Marketing Planner* > *My Account* > *Approvers*.	The system setting *enabledMDF* = *true* must also be set.

Rights for sub-areas

Name	Description	Notes
MAPS_MODULE_DASHBOARD_VISIBLE	The user can view *Marketing Planner* > *Dashboard*.	
MAPS_MODULE_CALENDAR_VISIBLE	The user can view *Marketing Planner* > *Calendar*.	
MAPS_MODULE_REPORTS_VISIBLE	The user can view *Marketing Planner* > *Reports*.	
MAPS_MODULE_TOOLS_VISIBLE	The user can view *Marketing Planner* > *Tools*.	
MAPS_EXPORTS_VISIBLE	The user can use all export functions in the Marketing Planner, e.g. in the dashboard, the calendar or the budget view.	

Name	Description	Notes
MAPS_SAVE_VIEWS_VISIBLE	The user can save views.	
MAPS_PUBLISH_VIEWS_VISIBLE	The user can publish saved views.	

Note

The sub-area > *Planner* > *Budget* is visible when the user has the right MAPS_BUDGET_READ.

11.1.7 Job Manager

Name	Description	Notes
ACT_LIKE_ASSIGNEE	The user can act like an assignee, regardless of whether the user is assigned to a job as a processor.	This right should only be granted to administrators.
ACT_LIKE_CREATOR	The user can act like a creator, regardless of whether the user is assigned to a job as a creator.	This right should only be granted to administrators.
ACT_LIKE_PARTICIPANT	The user can act like a participant, regardless of whether the user is assigned to a job as a participant.	This right should only be granted to administrators.
ACCESS_WORKFLOW_ TAB_BPMN	The user sees the Workflow tab in the data sheet for jobs with BPMN workflow. The right has no influence on jobs with the previous workflow function.	

Name	Description	Notes
ADMIN_JM_REQUEST	The user can access job details even if the user has not been assigned as the Creator, Assignee or Participant.	
CREATE_JM_REQUEST	The user can create a new job, copy an existing job and change the owner of a job.	
EDIT_JM_REQUEST	The user can forward or reject jobs in a workflow, add comments, and enter variables based on access rights.	In addition to MODULE_ACCESS, this is a core right that the user requires to carry out tasks in the Job Manager module.
EDIT_ALL_WORKLOGS	The user can enter and change time expenditures for other users, assign time expenditures to other jobs and tasks, as well as delete their own and others' time expenditures.	Users without this right can only create and change their own time expenditures.
FINISH_JM_REQUEST	The user can finish jobs.	The job will then be flagged as *Finished* and can be found using the standard filter *Finished Jobs*.
CLOSE_JM_REQUEST	The user can cancel jobs.	
CHANGE_JM_REQUEST	The user can change the creator of a job.	
MODULE_ACCESS	The user can call the Job Manager module.	

Name	Description	Notes
COPY_JOB	The user can copy a job.	The user also requires the right CREATE_ JM_ REQUEST.
SKIP_WORKFLOW_STEPS	The user can "move" a job backwards and forwards through a workflow regardless of its actual status.	
PUBLISH_FILTER	The user can publish his or her own saved filters.	
DE_ARCHIVE	The user can restore canceled or finished jobs in order to reactivate them.	
EXPORT_TO_XML	The user can export jobs. The export is based on the selected filter and is saved as an XML file.	
SEE_ALL_EXPORTS	The user can download the XML exports of all users.	
SELECT_TYPE	The user can select a job type.	Without this right, the user can only select the standard type and the briefing.
MANAGE_FILTERS	The user is authorized to use the advanced search to search for specific jobs or to permanently save the search as a custom filter.	
MANAGE_REVIEW	The user can start a review of an asset in a job using a variable of the type *Asset Selection* and use a quick decision to approve or reject the asset. Only users whose role has the right view the review information in the right pane of a data sheet.	

Name	Description	Notes
MANAGE_VIEWS	The user can change the columns and views in the search and filter results.	Without this right, the user can only view the default settings or the settings of shared views.
VIEW_LOG	The user can view the processing history of a job and download it as an Excel list.	
DELETE_JM_REQUEST	The user can delete jobs; that is, the job is flagged as deleted and can then only be accessed using the Deleted Jobs filter.	
UNDELETE	The user can restore jobs that have been flagged as deleted.	
SEE_ALL_MODULE_THEMES	The user can view the entire theme tree, regardless of the visibility settings configured under > *Administration* > *Data Structures & Workflows* > *Theme Tree* for the Job Manager module.	
SEE_ALL_WORKLOGS	The user can view the worklogs of other users.	
ACCESS_ALL_ORGS	The user can view and access the objects of all of the organizational units.	Users that do not have this right can view only the objects in their own organizational unit and lower-level organizational units.
SEE_ANY_ORG_GRID_ROWS	When accessing tables, the user can view all of the lines, regardless of the organizational unit assignments.	Users that do not have this right can view only lines that are assigned to their own organizational unit.

Name	Description	Notes
EDIT_ANY_ORG_GRID_ROWS	When accessing tables, the user can edit all of the lines, regardless of the organizational units to which the lines are assigned.	
CREATE_TASK_TEMPLATES	The user can save the current task plan as a template for later use.	

The following rights are displayed under > *Administration* > *Users & Groups* > *Rights & Roles* but assigning them to a role has no functional effect:

- COMSUME_JMS_MESSAGES
- SHOW_BLUEPRINT_JOBS

11.1.8 Marketing Data Hub

Name	Description	Notes
ACT_LIKE_ASSIGNEE	The user can act like an assignee, regardless of whether the user is assigned to a data object as an assignee.	This right should only be granted to administrators.
ACT_LIKE_CREATOR	The user can act like a creator, regardless of whether the user is assigned to a data object as a creator.	This right should only be granted to administrators.
ACT_LIKE_PARTICIPANT	The user can act like a participant, regardless of whether the user is assigned to a data object as a participant.	This right should only be granted to administrators.
ACCESS_WORKFLOW_TAB_BPMN	The user sees the Workflow tab in the data sheet for data objects with BPMN workflow. The right has no influence on data objects with the previous workflow function.	

Name	Description	Notes
ADMIN_RM_ REQUEST	The user can access data object details even if the user has not been assigned to the data object as the Creator, Assignee or Participant.	
CHANGE_RM_ REQUEST	The user can change the creator of a data object.	
CLOSE_RM_ REQUEST	The user can cancel the workflow of a data object. Canceled data objects are displayed in the standard filter *Canceled Products*.	
COPY_ PRODUCT	The user can copy a data object.	The user also requires the right CREATE_RM_ REQUEST.
CREATE_RM_ REQUEST	The user can create a new data object and copy existing data objects. The user can also select a new owner.	
SKIP_ WORKFLOW_ STEPS	The user can "move" a data object backwards and forwards through a workflow regardless of its actual status.	
DE_ARCHIVE	The user can restore canceled or finished data objects in order to reactivate them.	
EDIT_RM_ REQUEST	The user can forward or reject data objects in a workflow, add comments, and enter variables based on access rights.	In addition to MODULE_ACCESS, this is a core right that the user requires to carry out tasks in the Marketing Data Hub module.

Name	Description	Notes
EXPORT_TO_ XML	The user can export data objects. The export is based on the selected filter and is saved as an XML file.	
FINISH_RM_ REQUEST	The user can finish data objects.	The data object will then be flagged as *Finished* and can be found using the standard *Finished Products* filter.
IMPORT_ FROM_XML	The user can import an item in XML format. Existing items are updated and new items are created.	
SEE_ALL_ EXPORTS	The user can download the XML exports of all users.	This right should only be granted to administrators.
MANAGE_ FILTERS	The user is authorized to use the advanced search to search for specific data objects or to permanently save the search as a custom filter.	
MANAGE_ VIEWS	The user can change the columns and views in the search and filter results.	Without this right, the user can only view the default settings or the settings of shared views.
MODULE_ ACCESS	The user can call the Marketing Data Hub module.	
PUBLISH_ FILTER	The user can publish his or her own saved filters.	
SELECT_TYPE	The user can select an item type.	Without this right, the user can only select the standard type and the briefing.

Name	Description	Notes
VIEW_LOG	The user can view the processing history of an item and download it as an Excel file.	
DELETE_RM_ REQUEST	The user can delete items; that is, the item is flagged as deleted and can then only be accessed using the *Deleted Products* filter.	
UNDELETE	The user can restore deleted items.	
SEE_ALL_ MODULE_ THEMES	The user can view the entire theme tree, regardless of the visibility settings configured under > *Administration* > *Data Structures & Workflows* > *Theme Tree* for the Marketing Data Hub module.	This right should only be granted to administrators.
SEE_ALL_ WORKLOGS	The user can view the worklogs of other users.	
ACCESS_ALL_ ORGS	The user can view and access the objects of all of the organizational units.	Users that do not have this right can view only the objects in their own organizational unit and lower-level organizational units.
SEE_ANY_ORG_ GRID_ROWS	When accessing tables, the user can view all of the lines, regardless of the organizational unit assignments.	Users that do not have this right can view only lines that are assigned to their own organizational unit.
EDIT_ANY_ ORG_GRID_ ROWS	When accessing tables, the user can edit all of the lines, regardless of the organizational units to which the lines are assigned.	
CREATE_TASK_ TEMPLATES	The user can save the current task plan as a template for later use.	

11.1.9 Review Manager

The rights are listed and explained in the manual.

11.1.10 Brand Management Portal

Attention

Please note that all rights must be maintained separately in the Brand Management Portal.

Name	Description	Notes
MODULE_ACCESS	The user can call the Brand Management Portal.	
AUTHORING_ACCESS	The user can call the service link for Magnolia Admin Central for the author instance.	
EDITORS	This right does not have any effect.	
PUBLISHERS	This right does not have any effect.	

11.1.11 Reporting Center

Note that the assignment of authorizations in the Reporting Center is different from the assignment of rights in other modules. Assign a role with the right MODULE_ACCESS for the Reporting Center to each user. The user will be created as a user in the Reporting Center when they open the Reporting Center for the first time. You will then be able to manage users and roles in the Reporting Center.

Please refer to the documentation for the Reporting Center for more information.

11.2 System Settings

This chapter provides a description of the system settings that you can access on the interface as an administrator.

Please note that more system settings exist. Contact your contact person for more information.

11.2.1 Administration

Name	Description
Account deac-tivation	Enter the number of days after which an unused account is deactivated. A value of 0 means an account is always active. Note that deactivation does not apply to accounts of external users.
Account deac-tivation respite	Enter the number of days that the user is warned prior to the deactivation of his account via e-mail. If the value 0 is entered, then no notification is sent.
Account requests selection of contact person	Select whether the user selects the contact person via a dropdown or an input field: • true = dropdown • false = input field
Account request user type mandatory	Select whether the User type field is mandatory in the account request.

Name	Description
Account request telephone number mandatory	Select whether the Telephone number field is mandatory in the account request.
Account requests extended user properties	Select whether the extended user properties (user type, company, job position, phone number) are shown or hidden in the account request.
Account requests external	Turn the login request mechanism for external users on or off.
Account requests external e-mail domains	Enter the e-mail domains from which the user can select for an external account request, separated by commas.
Account requests external SSO group IDs	Enter the IDs of the SSO group from which the user can select at an external account request, separated by commas. The list is displayed to the user as a drop-down.
Account requests external VDB group ID	Enter the ID of the VDB group that a user is assigned to for an external account request if the setting *Administration: Account requests external* is activated.
Account requests *Remarks* field	Select whether the *Remarks* field is mandatory.

Name	Description
Account requests *Function* field	Select whether the *Function* field is mandatory.
Account requests *Telephone number* field	Select whether the*Telephone number* field is mandatory.
Account requests Affiliate ID	Turn the usage of the affiliate ID on or off.
Account requests Affiliate ID default	Enter the affiliate ID that is entered as the default value when an account is requested.
Account requests *Affiliate ID* mandat-ory field	Select whether the Affiliate ID field is mandatory.
Account requests Affiliate SSO group IDs	Enter the IDs of the SSO group from which the user can select at an affiliate account request, separated by commas. The list is displayed to the user as a drop-down.
Account requests affiliate VDB group ID	Enter the ID of the VDB group that a user is assigned to for an affiliate account request.
Account requests validity	Enter the validity of the account in days. The account expires after this period.

Name	Description
Account requests external	Turn the function for internal account requests on or off.
Account requests internal automatic approval	Turn the automatic approval of internal accounts requests on or off.
Account requests internal approval	Turn the approval of internal account requests on or off.
Account requests internal e-mail domains	Enter the e-mail domains (including @) from which the user can choose for the internal account request, separated by commas.
Account requests internal SSO group IDs	Enter the IDs of the SSO group from which the user can select at an internal account request, separated by commas. The list is displayed to the user as a drop-down.
Account requests internal VDB group ID	Enter the ID of the VDB group that a user is assigned to for an internal account request if the setting *Administration: Account requests internal automatic approval* is activated.
Account requests types	Select which account requests are possible: • 0: internal login requests • 1: internal and external login requests • 2: internal, external and affiliate login requests.

Name	Description
Exclusion of users from approver list	Enter the users who should not be selected as approvers for user account requests.
Exclusion of BrandMaker employ-ees from approver list	Select whether users with an email address ending in "@brandmaker.com" are excluded from the user account request approver list. • Enabled: BrandMaker employees are excluded. • Disabled: If created, BrandMaker employees are also included in the approver list.
General terms and conditions	Select whether the user must agree to the terms and conditions in order to obtain access to the system.
Custom structure import user ID	Enter the ID of the user whose account is used to import custom structures and custom objects from an archive folder.
Custom structure import/export	Turn the import/export function for custom structures on or off.
Automatic user name generation	Turn the automatic user name generation on or off.
Switch off noti-fications during delegation	Switch the notifications on or off during a delegation. If you activate the setting, delegating users will not receive system messages. If you deactivate the setting, users can specify in their profile settings whether they want to receive system messages during their delegation.
User activity anonymization	Turn the anonymization of the user activity statistics on or off.

Name	Description
Preferred unit of length	Here, you define the unit of length that is used by default when creating a user.
Default coun-try/region	Choose the country or region that is assigned to each user as a default setting at the time that the user is created. The user can replace the default setting with a personal selection.
Default time zone	Choose the time zone that is assigned to each user as a default setting at the time that the user is created. The user can replace the default setting with a personal selection.
Reminder message for substitutes	Activate or deactivate reminder message for the users who have not defined substitutes yet.
External SSO login creating user	Select whether a user is to be created per SSO by the third-party system.
External SSO login roles	Turn on or off whether the internal role names of the user are submitted per SSO in a comma-separated list for all modules. If the user has no role in a module, then no role name is submitted for this module. If the same role name is assigned in multiple modules, then the role name is only submitted once to the external application. The role names are submitted using the parameter GroupName.
Failed logins	Enter the maximum number of failed logins. If this number is reached, the account is blocked for the period specified in *Administration: Failed logins blocking period*.
Failed logins block-ing period	Enter the blocking period of an account in minutes. An account is blocked for this period when the number entered in Administration: Failed logins is reached.
Affiliate ID valid-ation	Enter a regular expression to validate entered affiliate IDs.

Name	Description
Custom start page	Turn the custom start page that is displayed after login on or off.
Hide Contact button	Choose whether the Contact button is displayed: Activated = The Contact button is hidden. Deactivated = The Contact button is visible.
Logout button	Select whether the Logout button is shown.
Multi-lingual text input	Turn text input in multiple languages on or off.
Public Users	Switch the *Public Users* function on or off.
Online help	Turn the display of the link to the online help on or off.
Password Number of old passwords	Enter the number of old passwords that may not be reused. The value 0 means that there are no restrictions.
Password Validity	Enter the validity period of the password in days. The value 0 means that the password is valid for an unlimited period.
Password Maximum number of password changes	Enter the maximum number of password changes permitted per day. The value 0 means that there are no restrictions.
Password Minimum number of upper-case letters	Enter the minimum number of uppercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are inter-preted as 0.
Password Minimum number of lower-case letters	Enter the minimum number of lowercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are inter-preted as 0.

Name	Description
Password Minimum number of special characters	Enter the minimum number of special characters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password Minimum number of digits	Enter the minimum number of digits in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password Minimum length	Enter the minimum length of the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password button login page	Turn on/off the *Forgot password?* button on the login page.
Session timeout	Enter the session timeout in minutes. The period begins to run after the last action of the user in the system. If the time runs out without any further action by the user, the user is automatically logged out.
Language default user interface	Select the default language of the user interface.
SSO Button *SSO*	Turn the display of the SSO button on the login page on or off.
SSO e-mail update mode	Select the update mode for the e-mail address if SSO is used to update the user data: • Do not update: The e-mail address is not updated. • Fill empty: The e-mail address will be updated if no address is entered. • Overwrite - The e-mail address is always updated.

Name	Description
SSO E-Mail address syntax check	Turn the syntax check for e-mail addresses on or off for login in via SSO.
SSO e-mail veri-fication	Switch e-mail verification on or off. If verification is switched on, the user must confirm the submitted e-mail address.
SSO group match	Turn on or off whether a login per SSO is rejected if none of the submitted groups is found.
SSO group order	Enter a comma-separated list of SSO group IDs. Once an ID is entered, SSO groups are prioritized according to the IDs when logging in via SSO. If the system setting is empty, the functionality is deactivated.
SSO login form	Turn the login form on the login page on or off. The login form consists of the *User name* and *Password* fields as well as the *Login* button.
SSO service	Turn automatic forwarding to the authentication service on or off when visiting the login page. Forwarding is only executed for the IP addresses entered in *Administration: SSO service IP addresses*. The user is forwarded to the URL in *Administration: SSO service URL*.
SSO service IP addresses	Enter a comma-separated list of IP addresses to which the forwarding that is activated in *Administration: SSO service* applies. If the field is empty, then all visit-ors of the page are forwarded.
SSO service URL	Enter the URL of the authentication service.
VDB group auto-generation	Turn the auto-generation of VDB groups on or off. The auto-generation reads the VDBs that are either transmitted in the VDB groups via SSO groups or trans-ferred in the directly transmitted VDB groups. A new VDB group is generated from the read VDBs.
Define forwarder	You can define a forwarder when calling CiPortal.do.

11.2.2 Brand Management Portal

Name	Description
Magnolia author instance login mode	Select the login mode for the Magnolia author instance: • true = The login data of the currently logged-in user are used. • false = The data of the settings *Brand Management Portal: Magnolia author instance username* and *Brand Management Portal: Magnolia author instance password* are used.
Magnolia author instance user name	Enter the user name of a Magnolia administrator. Note that this setting is only used if *Brand Management Portal: Magnolia author instance login mode* is set to false. By default, the user name *superuser* is entered.
Magnolia author instance pass-word	Enter the password of a Magnolia administrator. Note that this setting is only used, if *Brand Management Portal: Magnolia author instance login mode* is set to false. By default, the password *superuser* is entered.
Magnolia page template	Enter the name of the template for the Magnolia page that is embedded in Media Pool.

11.2.3 Job Manager, Marketing Data Hub

Name	Description
Duration yellow phase	Enter the duration of the yellow phase of a workflow step in days. The yellow phase is the period directly before the due date of a workflow step. The workflow step has to be finished until the due date, otherwise the workflow step changes to the red phase. At the beginning of the yellow phase a reminder is sent by e-mail to the assignee of the workflow step.
Automatic administration of sub-objects	Specify how sub-jobs or sub data objects are managed: *Enabled*: When the parent job or parent data object is aborted, terminated, or deleted, all associated sub-jobs or sub-data objects are also aborted, terminated, or deleted. *Disabled*: When the parent job or parent data object is aborted, terminated, or deleted, it does not affect the sub-jobs or sub-data objects.

11.2.4 Marketing Planner

Name	Description
Task mode	Select how a task is started: • activated = A task is always started as a job in the module Job Manager. • deactivated = The user decides whether he starts a task in the Marketing Planner or a job in the Job Manager.
Task Reminder	Switch the notification function for tasks on or off.
Task Reminder days before due date	Specify how many days before the due date of a task the notification will be sent.

Name	Description
Task Reminder time	Specify the time of day at which the notification about the due date of a task will be sent. The time refers to the server time.
Deeplinks in e-mails	Turn the deeplink function in e-mails on or off.
Market development funds	Turn the feature *market development fund* on or off.
Initially expanded levels of the tree structure	Enter how many levels are displayed as expanded when opened initially. The value is applied for the calendar view and the budget view. If you enter the value 1, then only the root level is displayed.
E-Mail type	Select whether the Marketing Planner sends HTML e-mails or text e-mails: • activated = Marketing Planner sends HTML e-mails. • deactivated = Marketing Planner sends text e-mails.
E-Mail name	If the Marketing Planner sends a message, then the entered name is used as a placeholder.
External resources URL of system	Enter the URL of the DMC system whose resources are to be assigned to the planning elements in the Marketing Planner.
Hide budget settings	Select whether the settings tab *Budget* is visible: • activated = The tab *Budget* is hidden. • deactivated = The tab *Budget* is visible. A user can switch on or off the limitation of budget editing to the lowest level on the tab.
Display timeline name in calen-dar view	Select whether the name of the timeline should be displayed in the calendar view and within the PDF export.
Import available options	Decide whether the user can perform a full import, a delta import, or both when importing budget data.

11.2.5 Marketing Shop

Name	Description
Custom structure invoice address	Enter the name of the custom structure that contains the invoice address data.
Default country ID	Enter the ID of the country that is shown as default at entering addressing.
Custom structure delivery address	Enter the name of the custom structure that contains the delivery address data.
Custom structure order address	Enter the name of the custom structure that contains the address data of the orderer.
Affiliate groups custom structure	Enter the name of the custom structure that contains the affiliate groups.
Contact form recipient	Enter the e-mail address to which requests via the contact form are sent.
Validation cost centers	Enter a regular expression for validating the cost center.
Direct order item number validation	Enter a regular expression for validating the item number at direct order.
E-Mail BCC address	Enter, if required, a blind carbon copy address for all e-mails that the system sends.
Delete file after sending	Select whether the order XML file is deleted after it has been sent to the supplier. • activated = The XML file is deleted. • deactivated = The XML file is stored.
Custom fields display	Choose whether or not custom fields 1 and 2 are displayed in the left navigation in the Marketing Shop.
Addresses mandatory field Company	Select whether the field *Company* is a mandatory field for address inputs.

Name	Description
Addresses mandatory field Country	Select whether the field *Country* is a mandatory field for address inputs.
Addresses mandatory field First name	Select whether the field *First name* is a mandatory field for address inputs.
Media Pool Sync Items Validity	Turn on or off, whether items are invalidated when linked assets become invalid.
Media Pool Sync Item description automatic update	Turn on or off, whether the description of the following item types is automatically updated: • Download item • Digital Media • Brand Template Builder (all steps) • Brand Template Builder (step 3 only) If the setting is active, then the description is transferred from the meta data of the objects in the *Media Pool* and *Brand Template Builder* modules.
Media Pool Sync Item name automatic update	Turn on or off, whether the name of the following item types is automatically updated: • Download item • Digital Media • Brand Template Builder (all steps) • Brand Template Builder (step 3 only) If the setting is active, then the name is transferred from the meta data of the objects in the *Media Pool* and *Brand Template Builder* modules.
Media Pool Sync Virtual Database	Enter the comma separated list of VDBs whose assets are automatically updated.

Name	Description
Order approver structure	Select which requirement an approver has to fulfill: • Affiliate = The approver belongs to the same affiliate like the requesting user. • ORG_Unit = The approver must be on a higher level than the requesting user in the organizational structure. Enter in the system setting *Marketing Shop: Approver Number of levels*, how many levels above the user the approver has to be.
Order approver Number levels	Enter the number of levels above the requesting user that the approver has to be in the organizational structure. This system setting is only used, if *Marketing Shop: Approver requirement* is set to ORG_Unit.
Display terms of service on top	Shows confirmation of the Terms & Conditions on top of page.
Order in pieces	Turn on or off, whether items can be ordered in pieces, when the user has not the right SHOP_ORDER_HAPTIC_ANY_QTY: • activated = Users can order items in pieces, even if they do not have the right SHOP_ORDER_HAPTIC_ANY_QTY. • Deactivated = Users can only order in packaging units, if they do not have the right SHOP_ORDER_HAPTIC_ANY_QTY.
Order ID display	Turn the display of the order ID in the shopping cart, the order details and the order list on or off.
Order history time range	Select from which time range the user sees orders in the order history: • ALL = The user sees all orders. • YEAR = The user sees the orders of the last year. • MONTH = The user sees the orders of the last month.
Organizational units validation	Enter a regular expression for validating the ORG unit.
Third address in shopping cart	Select whether the third address is displayed in the shopping cart.

Name	Description
Unique name of cost center at the generic user attributes	Enter the name of the attribute used to assign a cost center to each user.
Cost Center Owner	Turn the usage of the information *Cost Center Owner* on or off.
Division for Cost Center	Turn the usage of the information *Division for Cost Center* on or off.
Additional Payment Information	Turn the usage of *Additional Payment Information* on or off.
Item description mandatory	Turn on or off whether the item description is a mandatory field. • Activated = The item description is mandatory. • Deactivated = The item description is optional.
Validation item number	Enter a regular expression for validating the item number.
Packaging unit size	Select the mode for entering the size of packaging unit: • activated = The size of packaging units can be entered as free text. • deactivated = The packaging unit is a defined size, for example piece.
Amount of items per page	Enter the number of items that are displayed in an item list on the first visit of a user.
Active XML interface	Turn the XML interface off or on. Item and order data is transferred via the XML interface.
XML interface multilanguage item names	Turn on or off the import of mulitilanguage item names in the format ~{XX}.

Name	Description
XML interface interval	Enter the interval in minutes in which the export and import are performed via the XML interface. The first interval starts at the time in *Marketing Shop: XML interface start time*.
XML interface interval supplier item export	Enter in minutes how often the supplier items export is done.
XML interface version	Select the version of the XML file.
XML interface FTP/S access host name	Enter the host name for the FTP/S access for exchanging the data via XML interface.
XML interface FTP/S access password	Enter the password for the FTP/S access for exchanging the data via an XML interface.
XML interface FTP/S access port	Enter the port for the FTP/S access for exchanging the data via XML interface.
XML interface FTP/S access user	Enter the user for the FTP/S access for exchanging the data via XML interface.
XML interface start time	Enter the start time for the first interval in format HH:MM. HH can be replaced by XX, if the indication of the hour is not important.
Terms & Conditions confirmation mandatory	Turn the mandatory confirmation of the Terms & Conditions on or off.
Shipping cost show note	Turn the display of the note text on or off, that is displayed in the shopping cart. The note informs the user that the shipping costs may still change during the course of order.
Activate direct order	Turn the function *Direct order* on or off.
Fields Show field event ID	Turn the display of the field on or off that is used for entering the event ID during the order process.

Name	Description
Behavior for items with zero stocks	Turn on or off for items with zero stock whether a descriptive message is shown when clicking the order button or the order button is deactivated: • activated = If an item's stock is run out, then the order button can be clicked, but only an descriptive message is shown. The item cannot be ordered. • deactivated = If an item's stock is run out, then the order button is deactivated.
Order status via e-mail	Turn on or off whether e-mails are sent when the order status is changed.
Show confirmation dialog	Turn the display of the dialog on or off that is displayed when a user has added an item to the shopping cart. In the dialog, the user can decide whether he/her would like to continue shopping or go to the shopping cart.
Show default supplier	Turn on or off whether the default supplier is displayed in item lists.
Show template parameters from Brand Template Builder	Turn the display of parameters of templates in *Brand Template Builder* module in the item data on or off.
Supplier e-mail - Standard delivery time	Select for the order e-mail to the supplier whether a standard delivery time is displayed or hidden, if the items don't contain a delivery time.
Supplier e-mail - Delivery address city	Select for the order e-mail to the supplier whether the field *City* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address company	Select for the order e-mail to the supplier whether the field *Company* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address country	Select for the order e-mail to the supplier whether the field *Country* of the delivery address is displayed or hidden.

Name	Description
Supplier e-mail - Delivery address department	Select for the order e-mail to the supplier whether the field *Department* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address e-mail address	Select for the order e-mail to the supplier whether the field *E-mail address* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address fax number	Select for the order e-mail to the supplier whether the field *Fax number* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address name	Select for the order e-mail to the supplier whether the field *Name* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address optional address information	Select for the order e-mail to the supplier whether the field *Optional address information* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address telephone number	Select for the order e-mail to the supplier whether the field *Telephone number* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address postbox	Select for the order e-mail to the supplier whether the field *Postbox* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address state	Select for the order e-mail to the supplier whether the field *State* of the delivery address is displayed or hidden.
Supplier e-mail - Delivery address street address	Select for the order e-mail to the supplier whether the field *Street address* of the delivery address is displayed or hidden.

Name	Description
Supplier e-mail - Delivery address number	Select for the order e-mail to the supplier whether the *Number* field in the delivery address is displayed or hidden.
Supplier e-mail - Delivery address post code	Select for the order e-mail to the supplier whether the field *Post code* of the delivery address is displayed or hidden.
Supplier e-mail - Display invoice address	Turn the display of the invoice address on or off: • activated = Invoice and delivery address are both displayed. • deactivated = The invoice address is only displayed it is different to the delivery address.
Supplier e-mail - Invoice address city	Select for the order e-mail to the supplier whether the field *City* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address company	Select for the order e-mail to the supplier whether the field *Company* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address country	Select for the order e-mail to the supplier whether the field *Country* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address department	Select for the order e-mail to the supplier whether the field *Department* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address e-mail address	Select for the order e-mail to the supplier whether the field *E-mail address* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address fax number	Select for the order e-mail to the supplier whether the field *Fax number* of the invoice address is displayed or hidden.

Name	Description
Supplier e-mail - Invoice address name	Select for the order e-mail to the supplier whether the field *Name* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address optional address information	Select for the order e-mail to the supplier whether the field *Optional address information* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address tele-phone number	Select for the order e-mail to the supplier whether the field *Telephone number* of the invoice address is displayed or hidden.
Suppler e-mail - Invoice address post-box	Select for the order e-mail to the supplier whether the field *Postbox* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address state	Select for the order e-mail to the supplier whether the field *State* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address street	Select for the order e-mail to the supplier whether the field *Street address* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address number	Select for the order e-mail to the supplier whether the field *Number* of the invoice address is displayed or hidden.
Supplier e-mail - Invoice address post code	Select for the order e-mail to the supplier whether the field *Post code* of the invoice address is displayed or hidden.
Supplier e-mail - Order ID	Turn the display of the order ID in the order e-mail for the supplier on or off.
Supplier e-mail - Order number	Turn the display of the order number in the order e-mail for the supplier on or off.

Name	Description
Supplier e-mail - Supplier address City	Select for the order e-mail to the supplier whether the field *City* of the address is displayed or hidden.
Supplier e-mail - Supplier address company	Select for the order e-mail to the supplier whether the field *Company* of the address is displayed or hidden.
Supplier e-mail - Supplier address country	Select for the order e-mail to the supplier whether the field *Country* of the address is displayed or hidden.
Supplier e-mail - Supplier address department	Select for the order e-mail to the supplier whether the field *Department* of the address is displayed or hidden.
Supplier e-mail - Supplier address e-mail address	Select for the order e-mail to the supplier whether the field *E-mail address* of the address is displayed or hidden.
Supplier e-mail - Supplier address fax number	Select for the order e-mail to the supplier whether the field *Fax number* of the address is displayed or hidden.
Supplier e-mail - Supplier address name	Select for the order e-mail to the supplier whether the field *Name* of the address is displayed or hidden.
Supplier e-mail - Supplier address optional address information	Select for the order e-mail to the supplier whether the field *Optional address information* of the address is displayed or hidden.
Supplier e-mail - Supplier address telephone number	Select for the order e-mail to the supplier whether the field *Telephone number* of the address is displayed or hidden.

Name	Description
Supplier e-mail - Supplier address postbox	Select for the order e-mail to the supplier whether the field *Postbox* of the address is displayed or hidden.
Supplier e-mail - Supplier address state	Select for the order e-mail to the supplier whether the field *State* of the address is displayed or hidden.
Supplier e-mail - Supplier address street address	Select for the order e-mail to the supplier whether the field *Street address* of the address is displayed or hidden.
Supplier e-mail - Supplier address number	Select for the order e-mail to the supplier whether the *Number* field in the address is displayed or hidden.
Supplier e-mail - Supplier address post code	Select for the order e-mail to the supplier whether the field *Post code* of the address is displayed or hidden.
Display terms of service	Turn the agreement with the terms of services on or off: • true = The user must agree to the Terms of Service to be able to order. • false = The user orders without agreement to the terms of services.
Use price lists from Brand Template Builder	Turn the usage of price lists from *Brand Template Builder* module in Marketing Shop on or off.
Delivery Time: Delivery time default	Enter the default delivery time in days. This delivery time is used for items where no delivery time has been assigned.
Orderer e-mail - Delivery address city	Select for the confirmation e-mail to the orderer whether the field *City* of the delivery address is displayed or hidden.

Name	Description
Orderer e-mail - Delivery address company	Select for the confirmation e-mail to the orderer whether the field *Company* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address country	Select for the confirmation e-mail to the orderer whether the field *Country* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address department	Select for the confirmation e-mail to the orderer whether the field *Department* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address e-mail address	For the confirmation e-mail to the orderer, choose whether the *E-mail address* field in the delivery address is displayed or hidden.
Orderer e-mail - Delivery address fax number	Select for the confirmation e-mail to the orderer whether the field *Fax number* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address name	Select for the confirmation e-mail to the orderer whether the field *Name* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery optional address information	Select for the confirmation e-mail to the orderer whether the field *Optional address information* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery telephone number	Select for the confirmation e-mail to the orderer whether the field *Telephone number* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address postbox	Select for the confirmation e-mail to the orderer whether the field *Postbox* of the delivery address is displayed or hidden.

Name	Description
Orderer e-mail - Delivery address state	Select for the confirmation e-mail to the orderer whether the field *State* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address street address	Select for the confirmation e-mail to the orderer whether the field *Street address* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address number	Select for the confirmation e-mail to the orderer whether the field *Number* of the delivery address is displayed or hidden.
Orderer e-mail - Delivery address post code	Select for the confirmation e-mail to the orderer whether the field *Post code* of the delivery address is displayed or hidden.
Orderer e-mail - Show identical addresses	Choose how addresses are displayed in the order: • true = The postal address, delivery address and invoice address are always displayed. • false = Delivery address and invoice address are only displayed when entries differ.
Orderer e-mail - Invoice address city	Select for the confirmation e-mail to the orderer whether the field *City* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address company	Select for the confirmation e-mail to the orderer whether the field *Company* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address country	Select for the confirmation e-mail to the orderer whether the field *Country* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address department	Select for the confirmation e-mail to the orderer whether the field *Department* of the invoice address is displayed or hidden.

Name	Description
Orderer e-mail - Invoice address e-mail address	Select for the confirmation e-mail to the orderer whether the field *E-mail address* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address fax number	Select for the confirmation e-mail to the orderer whether the field *Fax number* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address name	Select for the confirmation e-mail to the orderer whether the field *Name* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address optional address information	Select for the confirmation e-mail to the orderer whether the field *Optional address information* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address tele-phone number	For the confirmation e-mail to the orderer, choose whether the *Telephone number* field in the invoice address is displayed or hidden.
Orderer e-mail - Invoice address post-box	Select for the confirmation e-mail to the orderer whether the field *Postbox* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address State	Select for the confirmation e-mail to the orderer whether the field *Country* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address street	Select for the confirmation e-mail to the orderer whether the field *Street address* of the invoice address is displayed or hidden.
Orderer e-mail - Invoice address number	Select for the confirmation e-mail to the orderer whether the field *Number* of the invoice address is displayed or hidden.

Name	Description
Orderer e-mail - Invoice address post code	Select for the confirmation e-mail to the orderer whether the field *Post code* of the invoice address is displayed or hidden.
Orderer e-mail - Order ID	Select for the confirmation e-mail to the orderer whether the field *Order ID* is displayed or hidden.
Orderer e-mail - Order number	Select for the confirmation e-mail to the orderer whether the field *Order Number* is displayed or hidden.
Order e-mail - Orderer address city	Select for the confirmation e-mail to the orderer whether the field *City* of the address is displayed or hidden.
Order e-mail - Orderer address company	Select for the confirmation e-mail to the orderer whether the field *Company* of the address is displayed or hidden.
Order e-mail - Orderer address coun-try	Select for the confirmation e-mail to the orderer whether the field *Country* of the address is displayed or hidden.
Order e-mail - Orderer address department	Select for the confirmation e-mail to the orderer whether the field *Department* of the address is displayed or hidden.
Order e-mail - Orderer address e-mail address	Select for the confirmation e-mail to the orderer whether the field *E-mail address* of the address is displayed or hidden.
Order e-mail - Orderer address fax number	Select for the confirmation e-mail to the orderer whether the field *Fax number* of the address is displayed or hidden.
Order e-mail - Orderer address name	Select for the confirmation e-mail to the orderer whether the field *Name* of the address is displayed or hidden.
Order e-mail - Orderer address optional address information	Select for the confirmation e-mail to the orderer whether the field *Optional address information* of the address is displayed or hidden.

Name	Description
Order e-mail - Orderer address telephone number	Select for the confirmation e-mail to the orderer whether the field *Telephone number* of the address is displayed or hidden.
Order e-mail - Orderer address postbox	Select for the confirmation e-mail to the orderer whether the field *Postbox* of the address is displayed or hidden.
Order e-mail - Orderer address state	Select for the confirmation e-mail to the orderer whether the field *State* of the address is displayed or hidden.
Order e-mail - Orderer address street address	Select for the confirmation e-mail to the orderer whether the field *Street address* of the address is displayed or hidden.
Order e-mail - Orderer address number	Select for the confirmation e-mail to the orderer whether the field *Number* of the address is displayed or hidden.
Order e-mail - Orderer address post code	Select for the confirmation e-mail to the orderer whether the field *Post code* of the address is displayed or hidden.
Order Confirmation - Display additional e-mail address field	Select whether the field for an e-mail address is shown. The order confirmation is also sent to this e-mail address.
Order Confirmation - E-mail field mandatory	Select whether the field is mandatory in which an e-mail address is entered. The order confirmation is also sent to this e-mail address.
Order Confirmation - E-Mail field default	Enter a part of the e-mail address as pre-fill. The order confirmation is also sent to this e-mail address.

11.2.6 Media Pool

Name	Description
Maximum number of system messages	Enter the maximum number of system messages that are shown in the Media Pool.

For a description of other system settings, see the Media Pool administration manual.

11.2.7 Reporting Center

Name	Description
Dashboard - Default dashboard	Enter the path to the dashboard to be displayed by default in the Reporting Center. Please note that the dashboard must be saved under Forgan-izations/Forganization/Reporting_Center/Dashboards.

11.2.8 Review Manager

The system settings are listed and explained in the manual.

11.2.9 Smart Access

Name	Description
Activation start page	Turn the activation of the Smart Access start page on a recall of Smart Access on or off. If the function is switched on, the user is always redirected to the Smart Access start page when recalling Smart Access. If the function is switched off, then the system stores the last visited Smart Access page of the current session. When recalling Smart Access, then the user is redirected to the last visited Smart Access page.

11.2.10 Brand Template Builder

For system settings for *Brand Template Builder* module, see the administration manual of the module.