Uptempo GmbH

Job Manager

User Manual

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Uptempo GmbH

An der Raumfabrik, Amalienbadstraße 41a

76227 Karlsruhe, Germany
+49 721 97791-000

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1

First steps

Job Manager is the module for order, project and workflow management that allows you to map and control workflows, tasks, resources, and processes in an efficient and comprehensible way. A marketing campaign in large companies requires the collaboration of different teams and roles that follow a well-defined and purposeful workflow.

You can use the *Job Manager* to map the campaign as a job or process, for example. By defining specific workflows, you can create project templates and use them to map the individual phases and the schedule.In addition, frequently recurring activities can be created as tasks and automatically assigned to a Work-flow Step. All information required for the campaign, such as quotations, respons-ibilities, concepts, or layouts, can be stored and managed directly in the job.

This way, each process flow can be modeled in a need-based and detailed way.

Target group

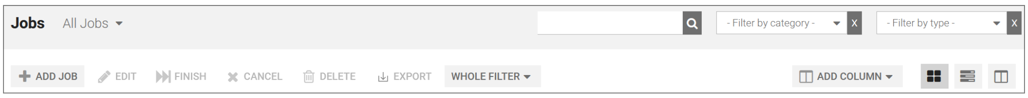
is intended for all users who want to plan marketing campaigns with the *Job Manager* module and map their content.

> **Note**
>
> It may happen that you cannot access functions or areas described in this manual. This may be because your user role does not have the appro-priate rights, or because these functions are not used in your marketing department.
>
> If you have any additional questions, please contact your administrator.

User roles and rights

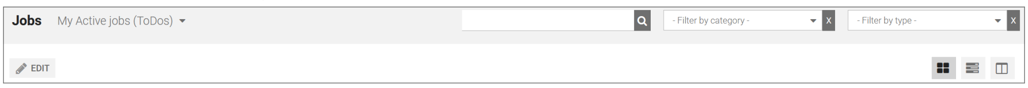
You have different rights and permissions depending on your user role. Most of the illustrations in this manual are shown from the point of view of a user for whom almost all rights are enabled in the user role for the Job Manager.

- Job overview when all rights are assigned

  This user role has all the functions of an administrator or power user.

- Same view, with highly restricted access

  This user role can only edit and forward existing jobs, but cannot create any new jobs.

Therefore, the tabs and fields that are visible or can be edited depends on the role you belong to. If you as a user have only a limited range of available functions, this is generally the situation desired by your organization, so you can fully concentrate on your role, activity, and tasks in the Job Manager.

> Note
>
> It is common practice that, as a person moves up in the organization, more administrative tasks are taken on with the new area of responsibility. If you have any questions about your user role, please contact your administrator.

Some steps and functions described in this manual require advanced permissions in your user role for Job Manager.

Recommended for new users

If you have never worked with the Job Manager before, we recommend that you first familiarize yourself with the following topics to get started:

- Calling up the Job Manager module
- General information
- Structure of the module
- Searching jobs and filtering results
- Creating jobs
- Editing a job
- Finishing a job

Interaction with other modules and functions

The *Job Manager* module allows you to access data from other modules of the system and the processing results in the Job Manager can be made available there:

- You can start a review for a stored asset. This allows you to make coordination processes transparent. You can select an asset from the Media Pool and add it to the job.
- In the Marketing Planner, you have the option of starting jobs for planning elements. Refer also to the interfaces in General information .
- Resource Management provides an overview of the workload of users who are processing tasks and jobs and allows optimized task distribution.

- You can edit a Brand Template Builder document stored for the job and adapt it to your own requirements.

1.1 General information

In large companies, there are often complex processes that have to be coordinated across departmental boundaries and locations of the company. Moreover, many people are entrusted with different tasks. To complete a task, i.e. creating a new marketing campaign, all relevant information must be available in one place.

In the past, you may have relied on different software applications or even just Excel to achieve this, and those involved not always had the most up-to-date data. This information is now collected in the job data sheet of the *Job Manager* module.

The *Job Manager* module is a powerful application that helps you organize and control complex processes in your company. To simplify and standardize these processes, they are mapped in the form of jobs or processes. The various employees involved in a job or process are informed and involved through the Job Manager. This software assigns upcoming workflow steps and notifies colleagues by e-mail. In addition, the participants can exchange information about a job and clarify questions in the comment area. This improves cooperation and increases efficiency.

In this chapter, you will learn about the key terms and functions of the Job Manager.

What is a job or process?

A job or process is a defined workflow that can be performed multiple times in order to achieve the desired work result. The process is represented by a workflow.Jobs and processes differ in the respective workflows on which they are based. A job has a linear workflow that cannot be changed. Depending on the decisions made by the assignee, a process workflow can also contain parallel or alternative paths.

> **Note**
>
> Processes can be displayed in the Kanban view but cannot be edited.

Additional required tasks can be mapped by means of sub-jobs. A sub-job can use a different workflow that is independent of the parent element. Sub-jobs allow you to structure workflows and make dependencies between different workflows recognizable. See *Sub-jobs or processes* on page 54.

What is a workflow?

A workflow is a process that defines the steps of a job or process. Workflows standardize work processes and ensure that everyone involved has the same instructions and expectations for how to perform a particular activity. A workflow helps you organize, prioritize, and track work more efficiently. This helps marketing teams achieve a specific goal, as workflows ensure the timely provision of the necessary staff, the relevant data, and the required resources.

Example

One example of a workflow is the creation of a marketing campaign from conception to publication. A workflow for such a campaign may be as follows:

1. Create job: A marketing manager creates a new job. When creating the job, the marketing manager uses a suitable job or process template with tasks that represent the individual steps of the workflow, e.g. *Research*, *Draft*, *Review*, *Release*, and *Publication*.
2. Idea generation and information gathering: The marketing manager compiles information about the target group, the market, and the competition. Then a list of possible topics and content for the campaign is created. The marketing manager adds all relevant information and requirements to the data sheet. At all stages, the marketing manager can view the progress of the job at any time and intervene in the event of impending timeouts.
3. Prioritization and resources: The marketing manager assigns the job to a user or user group, e.g. the creative team. The team or responsible managers are notified by e-mail and in the software. The marketing manager sets start and end dates and a budget for the job.
4. Creation and review: The creative team creates the content (assets) for the campaign and uploads the data in the job. A team member marks the content as ready for review and the job is routed to the next step and reassigned to the marketing manager. If the review is negative and a new version is needed, the workflow step can be returned.
5. Follow-up on progress: The marketing manager reviews the content and provides feedback or requests changes. The creative team makes the changes and marks the task as complete.
6. Approval: When all tasks are complete, a responsible person approves or rejects the job and its assets.
7. Publication and metrics: Once approved, the creative team publishes the content to the desired channels. The creative team measures the results of

the campaign and produces a report on the KPIs. The report is presented to the management.

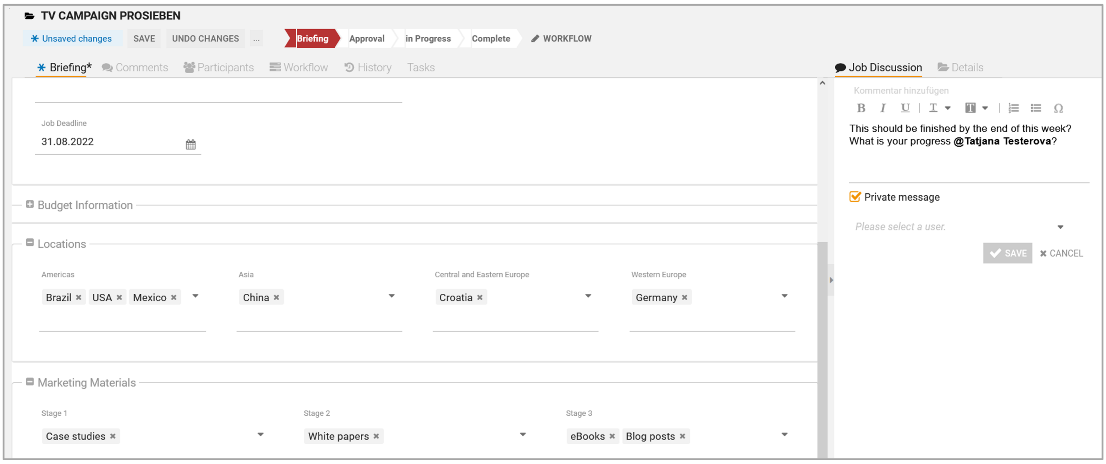
A workflow can be assigned to an assignee or a group of assignees who are responsible for completing the step in question. After processing, the assignee forwards the workflow to the next step.

Workflow step

What are workflow steps in a workflow? A workflow consists of various workflow steps, and each workflow step is assigned to a user group. A person can be selected from the members of the user group as the person responsible for a certain workflow step. In addition, tasks can be added to each workflow step to automatically create the typical tasks for the step when a job is created. See *Workflows* on page 47, Assigning a task to a workflow step.

Data sheet

The data sheet contains all important information about a job or process. The required information and input fields are arranged on different tabs. Data sheets can vary greatly depending on the company and the process, but they always have the same goal: to collect and provide data for all participants.



The content, layout, and design of the data sheet are defined in advance by an administrator according to the specifications of your organization. See *Data sheet* on page 35.

> **Note**
>
> The data sheets for jobs and processes in the Job Manager are always individually tailored to the needs and processes of a company. For this reason, we cannot show you specific use cases from your company, but rather only demonstrate all the functions of the Job Manager using general examples. Please contact your system administrator if required.

User categories

In a job/process, users have different responsibilities. The following user categories are available depending on the responsibility. We distinguish four categories.These are described in the following table:

User category	Description
Creator	You are the creator (owner) of a job or process if you have created the job or process. Note: The creator can only be changed subsequently for the *job* type. You cannot retroactively adjust the creator for a process type (BPMN workflow).
Assignee	You are the (current) assignee of a job or process if you are responsible for the current workflow step. The step has been assigned to you, e.g. a translation or a review. You can also be a member of an assigned group in which each person has the same rights, but you choose the workflow step to be processed, enter the data, and forward it to the next step.
Participants	You are a participant if you are invited to the job or process as a participant. As a participant, you are not responsible for the current workflow step, but you can follow the progress of the job or process. Participants can be added to a discussion.
Anonymous	Anonymous users are any users who are not the creator, an assignee, or a participant, but who can still access a job or process. In general, anonymous users only have read access to variables.

In order to make it easier for the users to process their respective tasks, access within the data sheet is controlled on the basis of the respective user category. For this reason, the tabs and fields that are visible or can be edited on the data sheet depends on the category you belong to.

Interfaces

- The *Marketing Planner* module lets you digitally manage your marketing planning and marketing calendar. You can create jobs in the *Job Manager* module and link them to planning elements that are displayed in the calendar and the budget view. If no suitable planning element exists, you can create a new one. This allows you to track how successful your marketing actions and campaigns are at any time. See *Interaction with the Marketing Planner* on page 61.
- Assets, e.g. for use in a campaign, are uploaded in the Media Pool module. If the job is configured accordingly, you can start the review of assets with the Review Manager directly from the data sheet. See *Asset Selector* on page 120.
- Another option is to use templates and document selection on the job data sheet when using the Brand Template Builder module. See *Example of use for the variable Template* on page 131 and *Example of use for the variable Document Selector* on page 132.

1.2 Additional Documentation

In the following list, you will find links to the documentation for the other modules that you will use regularly in your daily work with the Job Manager:

- Media Pool User Help 7.4
- Review Manager User Help 7.4
- Brand Template Builder User Help 7.4
- Marketing Planner User Help 7.4

1.3 Writing conventions

Notes are displayed in a gray box with a purple border.

Warnings are displayed in a gray box with a red border.

Breadcrumb trails can be recognized by the notation and format > *click here* > and then *here*.

Diese Seite wurde absichtlich leer gelassen, um sicherzustellen,

dass neue Kapitel auf einer rechten (ungeraden) Seite beginnen.

2

Structure of the module

This section explains the structure of the Job Manager module and the data sheet.

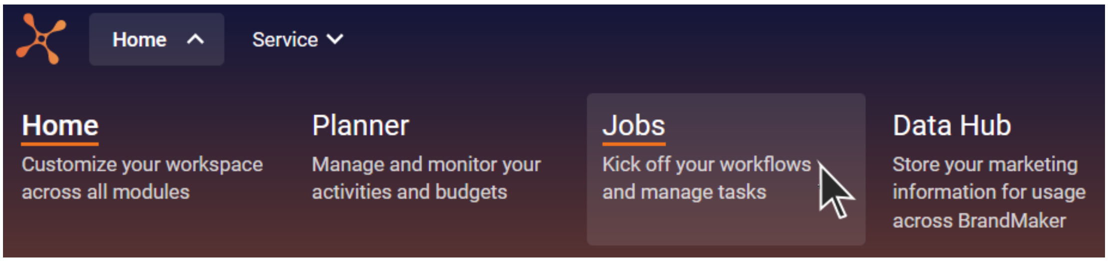
You will learn how to navigate the module and how the pages are structured. We will also show you what activities you can perform and where. You will also learn what’s behind the subheadings Resources and Tasks.

In addition, please read the following sections. You can also navigate using . There you will find the fine subdivision of the table of contents.

- *Navigation in the module* on page 24
- *Dashboard* on page 25
- *Data sheet* on page 35

2.1 Calling up the Job Manager module

If you click on > *Jobs* in the top navigation, the start page of the Job Manager module is displayed.



This takes you to the *Job overview* on page 27 with all relevant jobs and processes.

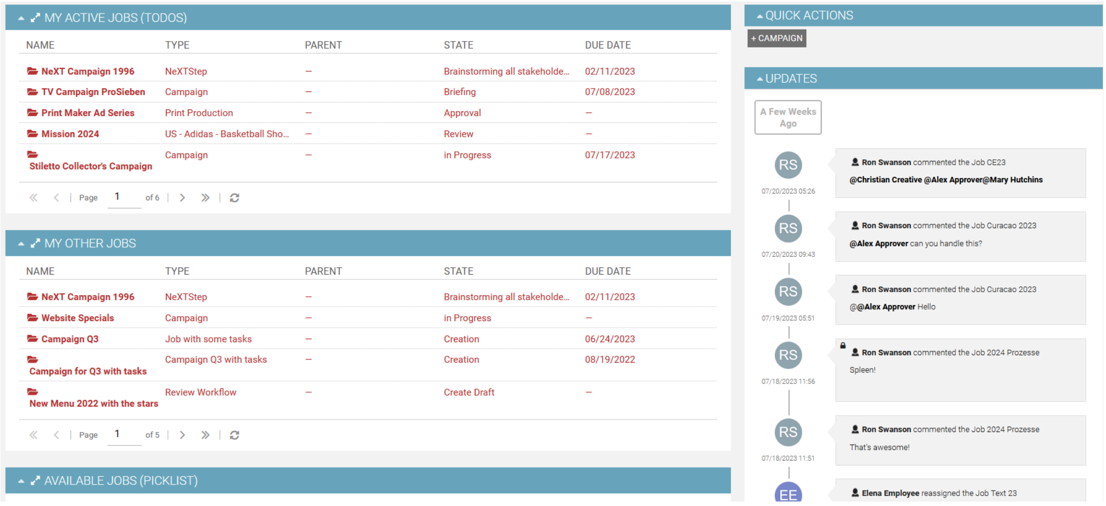
The first time you call up the overview, your active jobs are automatically displayed. This page may still be empty for you. You can adjust the content of the list using various filters or limit it using saved searches. See *Searching jobs and filtering results* on page 94.

2.2 Navigation in the module

In the navigation of the module, you will find the following elements.

2.3 Dashboard

You can access the dashboard via the entry of the same name in the main navigation in the Job Manager module. The dashboard provides you with an overview of your tasks to be completed. Just like in the job overview, you can open jobs for editing by double-clicking on the name. The content mainly consists of the following six relevant areas:



- *My Active jobs (ToDos)* : This area lists all the jobs, tasks, and processes that you must actively process and to which you are assigned as an assignee.
- *My other jobs* : This list shows all jobs and processes that you are involved in as a participant. A single job or process is only displayed in one of the two views – *My Active jobs (ToDos)* and tasks or *My other jobs* – at a time.
- *Available Jobs (PickList)* : Jobs and processes are listed here to which no assignees are currently assigned. When you accept a job or process, a dialog box opens in which you can assign the job or process either to yourself or to a member of your group. The job or process will then be displayed to the selected member under *My Active jobs (ToDos)*. The *Picklist* option in the standard filters is comparable to this, but has the advantage that it is always available in the job overview.
- *Available Tasks (PickList)* : This area lists the tasks to which no assignees are currently assigned. You can click on a pushbutton to accept the tasks directly; you are then automatically entered as the assignee. The task is then displayed at the top of the list under *My Active jobs (ToDos)*.

- *Jobs delegated to me* : This area displays jobs, tasks, and processes for which you are the registered substitute of the absent assignee. In these jobs and processes, you take over the tasks for the delegating user that result from the role as assignee of a job or process. You receive the rights of the delegating user for this purpose.
- *Quick actions* : The user can use the quick actions to create jobs or processes of a specific type directly, provided this type has been configured accordingly. Press the *Campaign* button to quickly create a frequently needed job based on a campaign template that has been defined accordingly by the administrator.
- *Updates* : This area lists all the notifications and discussion points for the jobs and processes that are relevant to the user. Changes to reviews that were started in the job or process are also displayed here.

Note

Please note that this seventh dashlet is not visible if there are no delegated jobs or processes.

Sort view

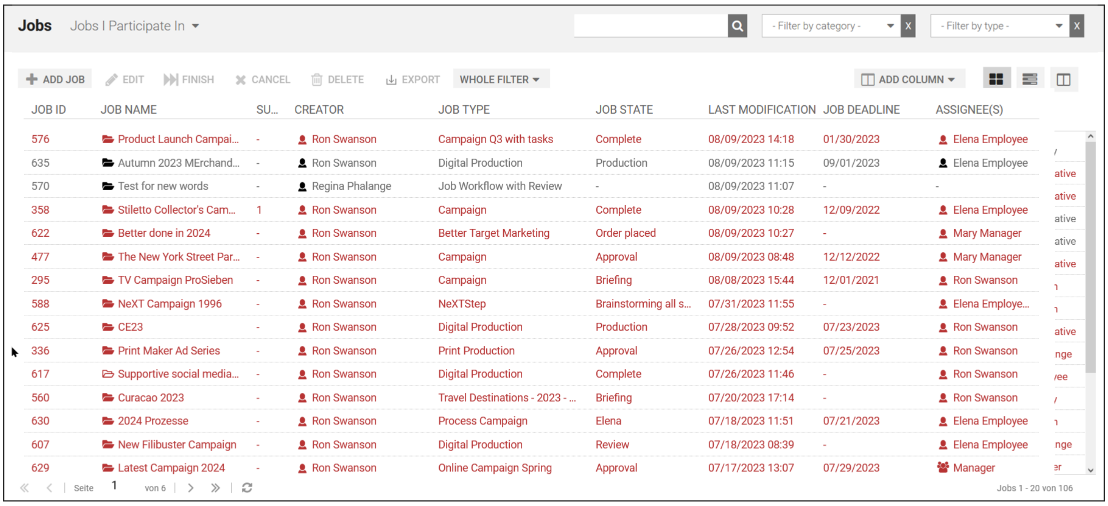
1. If you move the mouse over a column title, a ▾ menu appears.

   In this menu, you can show or hide the individual dashboard columns and sort them in ascending or descending order.
2. To exit the dashboard, click on *Search* in the title bar.

This will return you to the usual job overview.

2.4 Job overview

When you call up the Job Manager module, the job overview is opened as the start page.



The figure above shows the job overview for a user who is allowed to see all jobs.

It is possible to display jobs as a table, a Gantt chart or a Kanban board. When you call up the Job Manager module, you always see the tabular overview first, even if you prefer Gantt or Kanban.The overview shows all jobs and processes that you can edit. You can filter, search, and view jobs according to different criteria. You can configure the columns individually to display important information such as job status, due date, total delay or assignee. Jobs whose current workflow step is overdue are displayed in red font in the list of jobs.

When you call the module for the first time, your active jobs and tasks are displayed by default. You can also display the result of another filter instead. Please also note *My filters* on page 98.

For a detailed description of the different views, see *Display formats in the job overview* on the next page.

If you happen to be on one of the following subpages in the Job Manager: *Dashboard*, *Resources*, *Tasks*, *Time Recording*, or *Exports*, click on *Search* in the module navigation to return to the job overview. See *Navigation in the module* on page 24

Associated actions

- *Searching jobs and filtering results* on page 94
- *Opening a job* on page 110

2.4.1 Display formats in the job overview

The job overview gives you an overview of current jobs. You can monitor the status and progress of these jobs and make adjustments where necessary. Double-click to open a job in the list view.

The jobs can be displayed in a table, a Gantt chart, and a Kanban view. You can switch between the views using the following icons:

- Table
- Gantt chart
- Kanban view

See *Display formats in the job overview* above

Table: Quick access and comparison of details

The table overview table allows you to view the most important information (such as the name, creator, state, and completion date) at a glance. You can display additional required columns or hide columns that are not required. The table gives you quick access to individual details of the jobs and processes, allowing you to compare them. Double-click on an entry or click on the *Edit* button to open the selected job/process and view and edit the data sheet.

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

- Click while holding down the CTRL or CMD key: The clicked job or process is selected.
- Click while holding down the SHIFT key: The first and last clicked job or process and all in between will be selected.

For information on how to change the table view, see *Customizing the table view* on page 31.

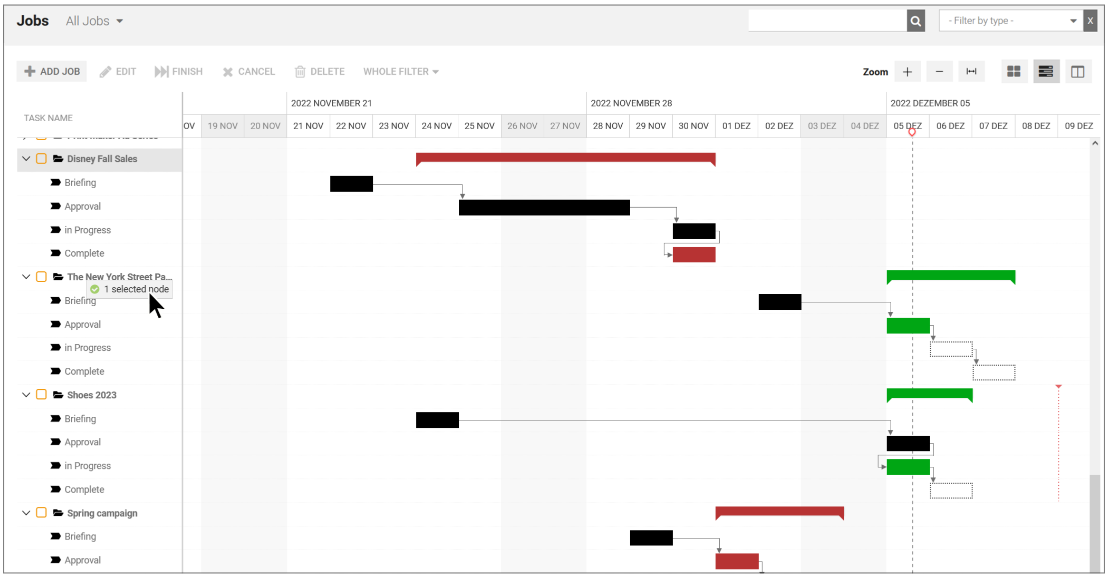
Gantt chart: Chronological progress and dependencies

The Gantt view can be used for conventional workflows (linear, non-branching). The Gantt chart allows you to visually analyze the chronological progress and dependencies between workflow steps and tasks. The chart displays the individual workflow steps in the form of bars; for processes, an aggregated bar is displayed across all workflow steps. The length of the bars is based on the plan entered on the *Workflow* tab in the data sheet. If there is no predefined time schedule, an across-the-board rate of one day per workflow step is assumed.

Different colors indicate the current status of the workflow steps:

- Workflow steps that have not yet been started are displayed in white with a dotted border. Those that have already been completed are solid black.
- As long as the current workflow step is still on schedule, it is displayed as a green bar.
- A workflow step is highlighted in red if it is not completed on time.

> **Note**
>
> Unlike the table view and the Kanban view, only active jobs can be displayed in the Gantt chart. It is not possible to display jobs with the status *finished*, *deleted*, or *canceled*.
>
> Your organization may have disabled the button to switch to Gantt mode because the complex workflows (process type) used do not support this view due to the branching capabilities.



- For an optimal view, use the zoom elements:

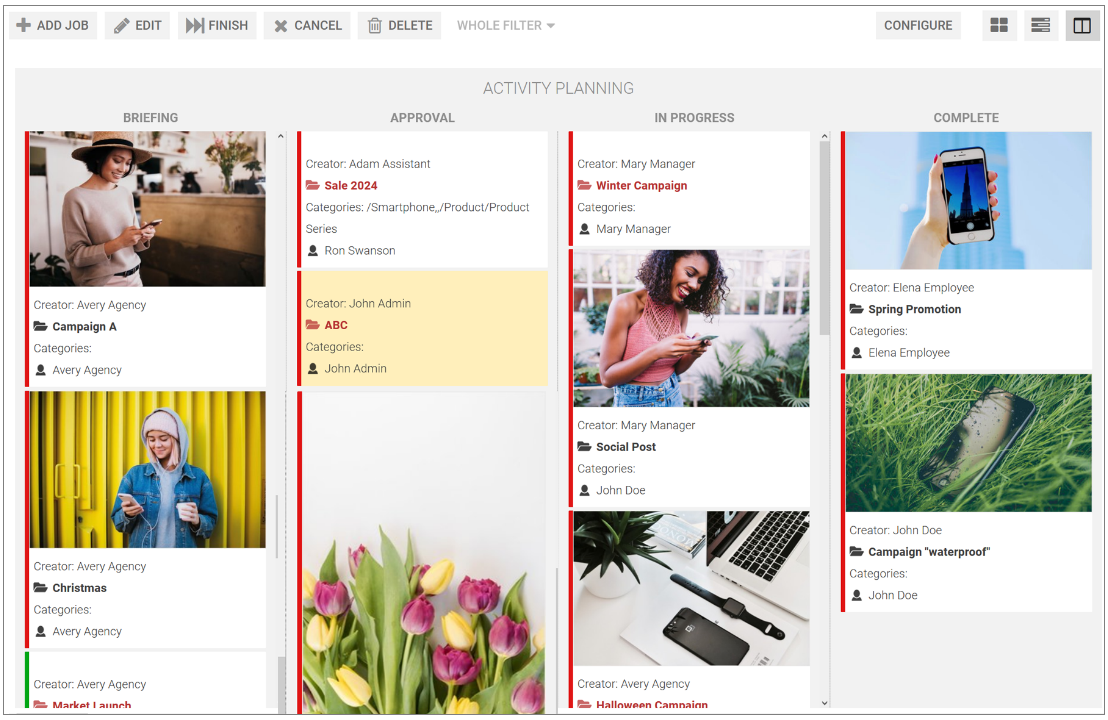
  Use the button on the far right to adjust the view to make the best possible use of the overall width.
- The desired job completion date, if available, is shown using the following marker:

Kanban view: Pending tasks

The Kanban view allows you to quickly find out in which workflow step jobs or processes are located. Each workflow step is represented by a column. The jobs can be moved here simply by dragging and dropping them into the next workflow step. Please note that, in the Kanban view, processes are shown but cannot be edited. You can recognize a process by the ⓘ following its name in the header. If you hover the mouse over the ⓘ icon, a tooltip with a detailed explanation will appear.

> **Note**
>
> If you cannot see the button to switch to the Kanban view, your organization may have disabled it to avoid problems due to the fact that it is read-only for processes.

Click on the tile of a workflow step to open the job in the Kanban view for editing.



If the current view displays jobs or processes with different workflows, a separate Kanban board is displayed for each workflow and multiple boards are arranged next to one another.

You can configure the information displayed for the jobs or processes.

Associated tasks

- *Customizing the table view* below
- *Customizing the Kanban view* on page 34

2.4.2 Customizing the table view

Ron is not satisfied with the default setting of the columns displayed in the job overview. He wants to add more columns to the view and delete a little-needed column.

Filter-dependent effects

If you want to change the columns of the tabular view in the job overview, please note that doing so may have different effects on the display with other filters depending on the filter type:

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

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

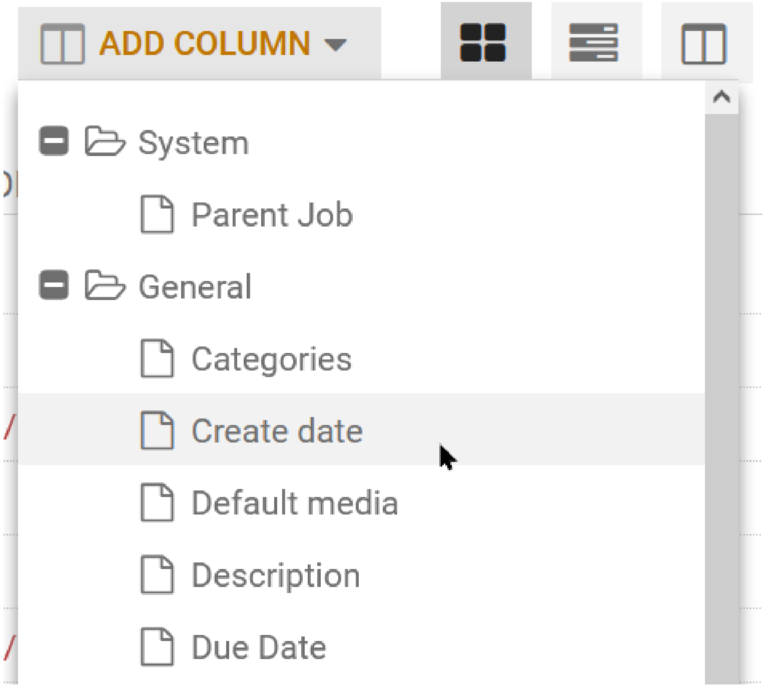
Add column

1. Select the filter function you want to use for the table.

   The overview is reloaded.
2. Note the explanations in the table above.
3. In the header area of the overview, click on *Add column*.

A drop-down list appears in which you can access all the variables used:

- *System*: You can select the number of sub-jobs belonging to the job or process or the name of the parent job or process.
- *General* : You can select any of the variables that have been flagged as “for all types.”



> **Note**
>
> Selectable variables must have been defined during the type configuration by the responsible person (key user or administrator) with the checkbox *For all types* activated.

- You will find all other existing job types listed below *General*. These can also be expanded individually to gain access to the job variables. You can select the information (variables) belonging to the job or process by selecting and expanding a type.

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

The new columns are displayed in the table.

Remove column

1. Select the filter for which you want to change the table.
2. Note the explanations in the table above.

The overview is reloaded.

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

   A down arrow will now appear in the cell on the right.

4. Navigate to ▾ > *Columns*.

   A drop-down list with all the columns in the table is displayed.

5. Deactivate the checkboxes at the columns that you want to remove.

The columns are removed.

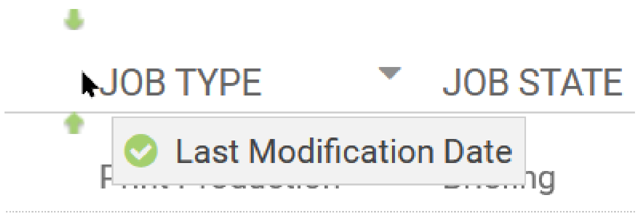
Reordering columns

You can also change the order of individual columns by moving individual columns to the left or right.

1. Use the mouse to click on and hold the column header of the column you want to reorder.

2. Drag and drop the column to the left or right.

   A green indicator shows where you can release the column.



3. Release the mouse button and the column will snap to the new position.

You have reordered the column view.

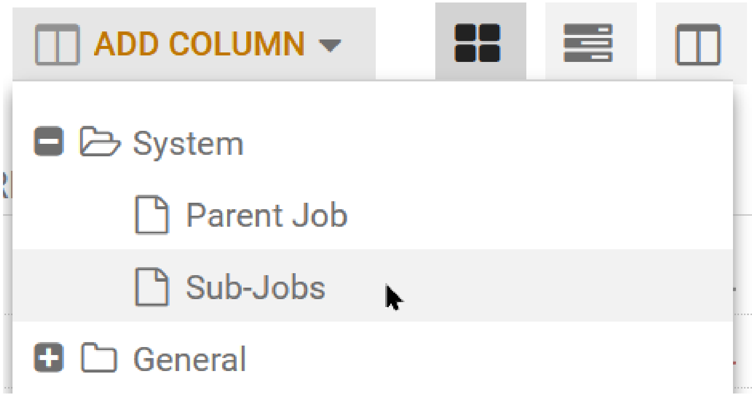
2.4.2.1 Adjusting the view

Ron is not satisfied with the default setting of the columns displayed in the job overview. He wants to add more to the view.

To customize the job overview to his needs, he wants to add two columns. This is because he is particularly interested in the sub-jobs and their parent job.

Highlighting the sub-jobs

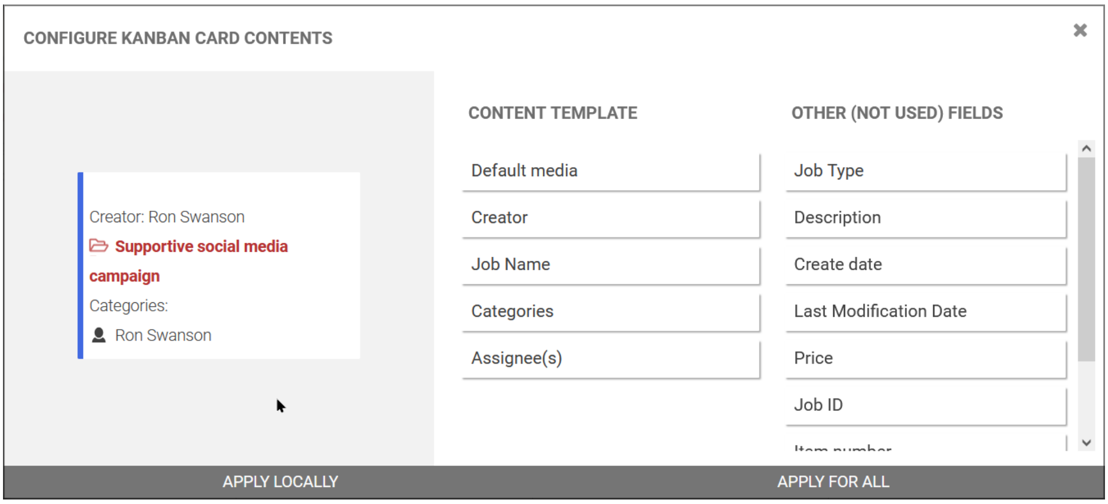
Click on *Add Column* to select the *System* columns *Sub-Jobs* and *Parent Job* from the menu. If you show these columns, you can better identify sub-jobs and their parent jobs.



See *Customizing the table view* on page 31.

2.4.3 Customizing the Kanban view

In the Kanban view, you have the option of configuring which data of the jobs or processes is displayed. To do this, click on the *Configure* button in the Kanban view. The *Configure Kanban Card Contents* dialog box opens.



The variables that are currently displayed on the Kanban cards are listed on the left side. On the right are the variables that are not currently in use. You can grab the variables with the mouse and drag and drop between the lists to define which data should be displayed. You can also define the order of the data on the Kanban cards. Choose whether the change should be valid for all users or only for you.

- *Assign locally* - view valid for you only
- *Assign for all* - change is visible for all users

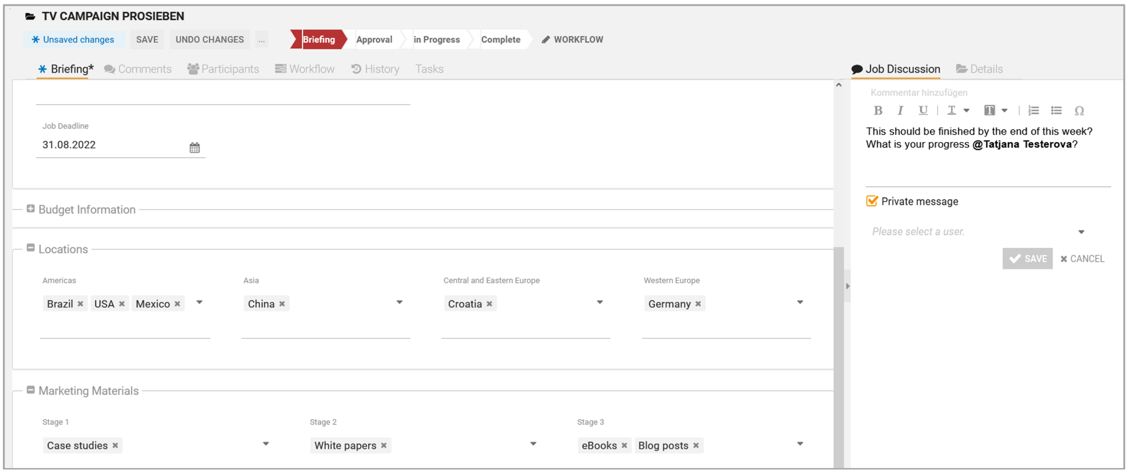
2.5 Data sheet

The data sheet is the core of your work in the Job Manager module. Here you enter data, add assets, and forward the job to the next assignee. All of the information about a job or process is collected and mapped on a data sheet. The wealth of information can be displayed so that it is clearly organized by topics on various tabs.

The data sheet contains, among other things:

- The users who are involved/participating in the job or process
- The current status (the current workflow step or the job manager status, e.g. deleted, finished, or active)
- The creator and the current assignee
- The predefined project workflow for the job or process, including the associated tasks
- The relevant information for the job or process.

To open the data sheet, double-click on the job name in the overview or in the dashboard. The data sheet is displayed full screen and can be closed using the close field in the top right-hand corner.



> **Note**
>
> The appearance and layout of the data sheet are tailored to the specific needs of the customer. Among other things, the appearance is determined by the number of tabs created, their names, and the field functions that are used on them. The tabs *Basic Data*, *Comments*, *Participants*, *Workflow*, and *History* are created automatically. The User can change the names of these tabs, but cannot remove them. Individual tabs and fields can also be hidden by the administrator for certain user groups by changing the visibility settings under the configuration of access rights in the data sheet.

There are various functions in the upper area:

Above the data sheet, you can see which workflow step the job is currently in. In the example below, it is already the last step (*Complete*).

- *Forward job* : This forwards the job to the next workflow step. See .Forwarding a job.
- … menu: You can access functions such as *Pass back*, *Clone*, *Link*, *Delete*, *Cancel*, *Change assignee*, and *Link Planning Element*.
- Displays the current Workflow-Status
- *Workflow* : Clicking on this button for the *job* type opens the *Workflow* tab where you can maintain the Workflow-Status as well as the assignment to assignees.

  Note: For the *process* type, this is not possible for the end user.

Below that, you can access the various tabs. If the icon is displayed on a tab for a variable and you click on it, a help text is displayed as a tooltip.

The default tabs *Job Discussion* and *Details* are in the right-hand area of the data sheet. The comments of the main job discussion are displayed under *Job Discussion*. You can add a new comment or open a thread to an existing comment by clicking on *Reply*. The main job discussion can also be found under the tab *Comments*. On this tab, you can also add an asset and open additional discussions and add discussion participants.

The basic data of the job is displayed on the *Details* tab. If there is a variable is available on the data sheet for asset selection and you click on it, the tab displays detailed information about the asset and – if a review was created for the asset –

the details of the review. You can also find detailed review details in this tab, such as review started, approved, rejected, new version requested or new version uploaded.

If you see a (-) before the name of a line title, you can click on it and the corresponding area of the data sheet will be collapsed. This gives you a better overview of large data sheets. Conversely, you can expand collapsed lines of the data sheet by clicking on the (+) before the name. This option must be set up by the administrator when the data sheet is set up, otherwise it will not be available to users.

You close the data sheet and return to the overview by clicking on the close field ✕ in the upper right-hand corner.

Associated tasks

- *Overview of data sheet variables* on page 112
- *Managing participants* on page 44
- *Viewing workflows* on page 52
- *Scheduling a workflow* on page 48
- *Asset Selector* on page 120
- *Sub-jobs or processes* on page 54
- *Sending messages to participants* on page 142
- *Interacting with colleagues* on page 136
- *Forwarding a job* on page 80
- *Copying a job* on page 43
- *Task Manager* on page 71

Diese Seite wurde absichtlich leer gelassen, um sicherzustellen,

dass neue Kapitel auf einer rechten (ungeraden) Seite beginnen.

3

Creating jobs

Ron is planning a new marketing campaign. To create it in the Job Manager module, he needs to create a job (see *Adding a job* on the facing page). Sometimes a similar campaign already exists, so he can copy the existing job and adjust the data as needed. This means that Ron does not need to re-enter some of the data, which saves time. See *Copying a job* on page 43.

To plan and execute the job, Ron needs the help of colleagues with different functions. For this reason, he will invite them to the job, e.g. as participants, see *Managing participants* on page 44. If necessary, he can assign workflow steps to them directly for processing, see *Changing the assignee for workflow steps* on page 49.

Ron cannot manage the campaign alone and wants to discuss the job with his team colleagues as it progresses. He can add them to the job by sending them an invitation from the job data sheet. In the process, he can classify them as participants who can see and comment on the job. To find out how to do this, see *Managing participants* on page 44. He can also assign workflow steps for participants to process. Note *Changing the assignee for workflow steps* on page 49.

Finally, Ron must define the individual workflow steps required to run the campaign. He assigns each step to a responsible person or group. Optionally, he adds a deadline. Ron saves the job and starts it. See *Scheduling a workflow* on page 48.

Ron wants to plan not only the workflow steps of the job, but also individual tasks and working times that belong to a workflow step. He can do this with the Task Manager (see *Task Manager* on page 71).

3.1 Adding a job

Ron wants to create the next image flyer for his company. To do this, he uses a job type that provides him with the necessary steps and tasks. A job type is a template provided by the company that describes the requirements and goals of a particular project.

Ron customizes the details of the new job, such as the name, budget, schedule, assignees, and target audience for the flyer. Then he sends the job to the first assignee, who handles the design. He can check the progress of the job at any time in the job overview.

1. In the overview, click on the *Add Job* button.

   The *Add Job* dialog box opens.

2. Enter the name of the job in the *Title* field.
3. In the *Job Type* field, select the type that suits your purposes.
4. If the area *Workflow* with different workflows is displayed below this: Select an appropriate workflow.

   Note: The area is only displayed if it is a classic workflow.

5. Click on *Add*.

   The data sheet opens.

6. Optional: Enter all relevant information about the campaign in the job, e.g.:
   - A briefing text to pass on the required briefing information.
   - An asset, e.g. to provide images as a pre-selection.
   - Use the appropriate variables / field functions to select a document in the *Brand Template Builder* module, e.g. to specify the template to be used for the flyer.

     Select the required boilerplate texts for creating a document.

   - Add additional required tasks to a workflow step. If available in the data sheet, see *Task Manager* on page 71.

     All fields marked with an asterisk (*) must be filled in. You cannot submit and close the job until these mandatory fields are filled in.

   Note: Data sheets may differ in appearance. This depends on the configuration of the particular job type and the requirements of your company.

7. Once you have entered all the information, click on *Save*.

8. Your details are saved.
9. If you have made a mistake, you can press the *Undo changes* button to restore the original state.
10. Optional: Press *Forward job* in the upper left-hand corner of the data sheet to forward the job to the next workflow step.
11. Click on ×.

This closes the data sheet. You have created the job or process with all the necessary information. You are back in the job overview.

Note

Your user role may be set so that you cannot choose from different job types when creating jobs. You can then create new jobs or processes based only on a preset default type. You can customize the job title and description, but you cannot choose the job type. This makes your job easier and prevents you from accidentally creating the wrong jobs or processes.

With the optional job type *Only Briefing*, the assignee initially only needs to enter basic data, can access the *Comments* and *Participants* tabs, and can invite people to the job discussion. The final job type can then be selected from the list of available types before forwarding.

Next steps

You may want to add participants (see *Managing participants* on page 44). Other steps and options include:

- *Forwarding a job* on page 80
- *Changing the assignee for workflow steps* on page 49
- Optional: *Scheduling a workflow* on page 48

3.2 Copying a job

Ron was commissioned to create an image flyer for his company. At the time, he created a job or process of the type *Advertising Material Production* containing all the necessary information. Now a new similar campaign is set to begin soon, and he also has to create a flyer for this campaign. To save time and effort, he decides to copy the existing job or process and use the information and data already entered as the basis for the next flyer.

Prerequisites For users without the necessary rights, the menu command is hidden.

1. Open the data sheet.
2. In the upper area of the data sheet, click on … > *Clone*.

   A new dialog box *Create job copy* opens.
3. Enter the name in the upper input field.

   Note: The name field is pre-filled with the entry *Copy of <job name>* by default.
4. Optional: Deactivate the checkboxes on the data sheet tabs whose contents you do not want to take over for the new job or process.

5. Click on *Clone*.

The job or process is copied.

Note

For field functions with *single select*, the copy does not contain the entire drop-down list, only the selected entry. When copying a job or process that contains a BTB template, a full copy is also made of the BTB template.

3.3 Managing participants

Ron is responsible for creating a brochure. He works with several colleagues who help him with the design, text, and legal review of the brochure. To complete the brochure, he must also seek advice from team members who are not directly involved in the workflow steps. In order to show these people the job and the results, Ron can add them as participants who don’t have workflow tasks but can open the job and attached assets.

Who is allowed to manage participants?

The creator of the job or users with appropriate permissions may manage participants. In order to add additional participants to a job, the *Participants* tab must be visible to you in the data sheet.

How does a user become a participant in a job?

Users automatically become participants if they created the job or previously processed a workflow step. Also, users can be invited to participate in a job.

The list of possible participants does not list all the names of your organization. You can only add people who are allowed to access the Job Manager module.

When a user group or organizational unit is selected, all of the users in the user group or organizational unit are added. Through a direct @-mention of other users in a discussion with @ in front of their name, they can be added to a job/-process and to the discussion as participants without going through the *Participants* tab. For more information, see the chapter *Interacting with colleagues* on page 136.

What is a participant allowed to do?

A participant has no responsibility for the current workflow step, but can track its progress. Participants can view the data sheet to get an overview of the project, open attached assets, ask questions in the job discussion, or provide feedback. Participants can also make changes to individual entries – if this is provided for. And finally, all participants can join a discussion.

There are two main mechanisms for access jobs in which users are participating:

- Participants can use the standard filter *Jobs I Participate In* to see all jobs/-processes they are participating in and follow the progress of the job.
- Invited participants receive an e-mail with a deep link to the job. Double-clicking on the name opens the job.

Associated actions

- Adding participants
- Removing participants

3.3.1 Removing participants

You can also remove participants from a job at any time.

1. Open the job data sheet.
2. Go to the *Participants* tab.
3. Click on the trash can icon to the right of the envelope icon in the line of the participant you want to remove.

The participant will be removed without a confirmation prompt.

3.3.2 Adding participants

Ron has created a new job in the system based on the type *Advertising Material Production* and has entered all the relevant information for the design of the brochure. Now he wants to add two team members as participants so that they can access the job at any time using the standard filter *Jobs I Participate In*. One participant is a PR manager who is to approve the advertising material, and the other is the account manager who communicates with the customer. Both of them are only supposed to make comments and do not provide any content for the data sheet. They also do not have to complete any workflow steps and are therefore to be understood as guests in their participant role.

1. Open the job data sheet.
2. Switch to the *Participants* tab.
3. Use the search field to search for a user. To do this, enter the first three letters of the name.
4. Select the desired user from the list of suggestions.

   The user is displayed in the tabular overview of participants.
5. Repeat steps 3 and 4 for each additional user that you want to add or remove.

The will be notified and will receive an e-mail with the subject *Job: Added as participant*. The new participant can access the job by clicking on the link in the e-mail.

3.4 Workflows

A workflow is a process that defines the steps of a job or process. Workflows standardize work processes and ensure that everyone involved has the same instructions and expectations for how to perform a particular activity. A workflow helps you organize, prioritize, and track work more efficiently. This helps marketing teams achieve a specific goal, as workflows ensure the timely provision of the necessary staff, the relevant data, and the required resources.

Workflow scheduling

The planning of the workflow steps consists of two important aspects: defining the start and end date for each step and assigning assignees to each step.

- Specify the start and end dates of the workflow steps (see *Scheduling a workflow* on the next page). Note: After you create a job/process, it is automatically in the initial workflow step. You cannot plan this step; the step starts when you create the job/process and ends when you forward the job/process to the first work step. Therefore, you can set the start and end date for subsequent steps only.
- Specify the assignees for the workflow steps. This is a temporary assignment that can be changed at a later date. You can find more information under *Changing the assignee for workflow steps* on page 49.

The user that creates the job/process is the creator and is therefore entered as the assignee for the initial workflow step. The creator is responsible for ensuring that the job/process is fully executed.

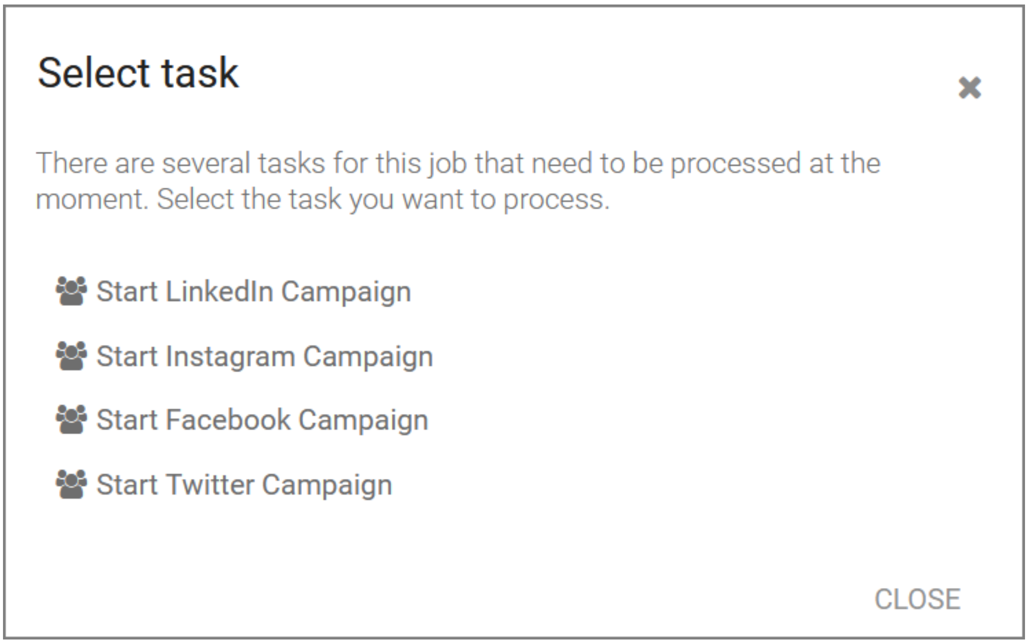
If a conventional job must be delegated to another user, who will then take responsibility for this job, enter the other user as the creator of the job. You can find more information under *Changing the creator* on page 59.

Special features for processes

With processes, multiple workflow steps can be active at the same time and assigned to individual assignees or user groups.

If a workflow step is now assigned to a user in a process, the following rule applies:

- A workflow step has been assigned to the user: The data sheet of the process is opened directly for the processing of this step.
- The user or the user group has multiple workflow steps assigned in parallel: Before opening the data sheet, a selection dialog box opens first.



Users can select one of the steps assigned to them or their group for processing.

Associated tasks

- *Scheduling a workflow* below
- *Changing the assignee for workflow steps* on the facing page
- *Checking the workload* on page 51

3.4.1 Scheduling a workflow

Ron has created a job. This job comprises several phases, which are represented by workflow steps. He can set a deadline for each step. He can also select an assignee or group that is responsible for executing the step. As the workflow progresses, Ron can adjust the details of the steps or change assignees if the original assignee is no longer available.

The planning of the workflow steps consists of two important aspects: defining the start and end date for each step and assigning assignees to each step.

- Specify the start and end dates of the workflow steps (see *Scheduling a workflow* above). Note: After you create a job/process, it is automatically in the initial workflow step. You cannot plan this step; the step starts when you create the job/process and ends when you forward the job/process to the first work step. Therefore, you can set the start and end date for subsequent steps only.

- Specify the assignees for the workflow steps. This is a temporary assignment that can be changed at a later date. You can find more information under *Changing the assignee for workflow steps* below.

The user that creates the job/process is the creator and is therefore entered as the assignee for the initial workflow step. The creator is responsible for ensuring that the job/process is fully executed.

Associated tasks

- *Changing the assignee for workflow steps* below
- *Checking the workload* on page 51

3.4.2 Changing the assignee for workflow steps

Ron has created a new job. Now he must specify the assignees for each step of the workflow. Assignees are the people responsible for executing the individual steps. The assigned assignee will optionally receive an e-mail notification, but will always receive a system notification about the assignment or change of assignment.

PrerequisitesYou are the creator of a job or have corresponding permissions. If there is a pencil icon with the text Workflow to the right of the workflow breadcrumb navigation in the open job data sheet, you are allowed to assign or change assignees.

For process types, the assignment is not carried out in the data sheet. Instead, this is determined by the administrator at the time the process is created. This approach ensures a clear definition of responsibilities.

Specifying an assignee

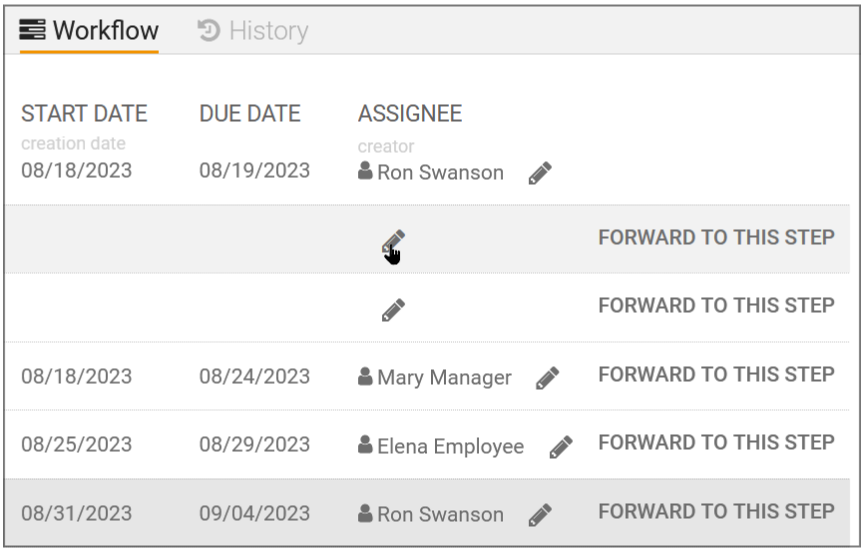
1. Open the data sheet.
2. Switch to the *Workflow* tab.

   Note: Carry out the following instructions for the first work step and the subsequent work steps. As the initial step, the first work step can only be assigned to the creator. You can find more information under *Changing the creator* on page 59.
3. For the workflow step for which you want to specify an assignee, click the pencil icon in the *Assignee(s)* column.

A drop-down list is displayed.

4. Select a user.
5. Optional: Check the workload of the user before assigning them (*Checking the workload* on the facing page).
6. Optional: Use the date selector to enter the *Start date* and *Due date* for the workflow step.
7. Optional: Repeat steps 3 and 4 for all the workflow steps for which you want to specify an assignee in advance.

You have specified the assignees for the workflow steps. The assigned persons are responsible for completing and forwarding the workflow step.



In the figure, two workflow steps do not have fixed assignees assigned.

In this case, when forwarding to the next step, the current assignee must then select an assignee for the next step from a predefined group in the Forward dialog box.

Note

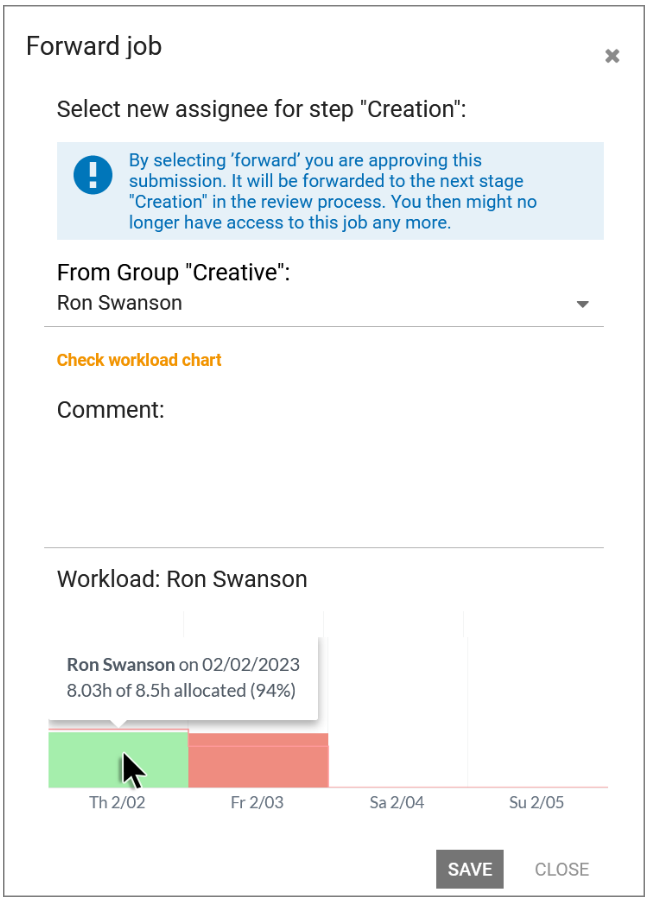
If the workflow step has not started yet, the assignment is a pre-assignment. The entered assignees are not informed about the pre-assignment.

As soon as the workflow step is started, the assignee is informed by e-mail about the assignment or any change made to it (cancellation). Assignees can also find an overview of the system notifications and the notification text of the e-mail by clicking on the bell icon next to the user initials.

3.4.3 Checking the workload

If you want to assign a user to a workflow step on the data sheet, you can check beforehand what the current workload of the user looks like.

1. In an open job with classic workflows, navigate to the *Workflow* tab.
2. In the *Assignee* column, select a workflow for which no assignee has been selected yet.
3. Use the pencil icon to open the participant assignment dialog box.
4. Select an assignee for the workflow step.
5. Select *Check workload chart*.



The workload is calculated and displayed in the dialog box, as shown in the figure. In the assignment dialog box, you can see the workload of the selected users compared to the working hours (from the user settings). In the figure above, only little can still be assigned on Thursday and, on Friday, the person's work time account is already more than exhausted (red).

6. Optional: If it becomes apparent that the selected assignee has an excessive workload or is absent, you can decide whether another user should be considered as a substitute or plan the task for yourself by pressing *Assign to me*.
7. Repeat steps 2 to 6 until all of the workflow steps have been assigned.

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

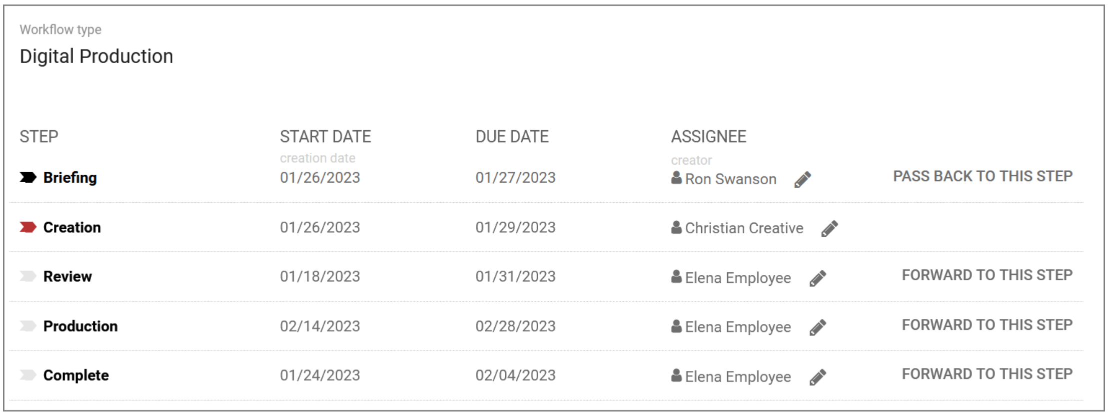
Refer also to *Scheduling a workflow* on page 48.

3.4.4 Viewing workflows

The workflow tab of the data sheet gives you an overview of the workflow steps into which the job is divided. It shows the individual steps of jobs and processes and, in the case of jobs, their deadlines, assignees, and completion status.

Viewing job workflows

Prerequisites Job creators can access the workflow view on the corresponding tab in the job data sheet. For other users, visibility is likewise rights-dependent.



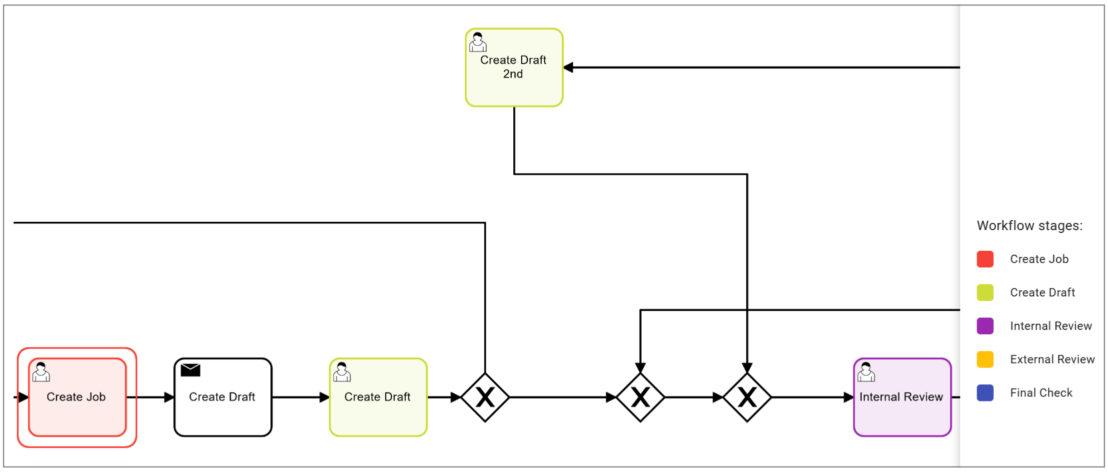
You can see the current workflow step, *Creation*, in the figure. The red arrow in front of it indicates that the workflow step is already overdue. The following steps remain unprocessed, so the arrows are gray.

In the *Assignee* column, you as the creator can change the assignee with the pencil icon. Refer also to *Changing the creator* on page 59.

Viewing a process workflow

Prerequisites Users need the additional right in their user role to be able to see the BPMN-specific workflow tab.

You can access the tab in the open process data sheet. The view of the process workflow is read-only.



The workflow task that is currently being processed is indicated by a double border. If the simplified view is configured, colors are assigned to the workflow step names.

> **Note**
>
> Due to the system architecture, you cannot change or define the assignee or adapt the creator in the process data sheet on the Workflow tab, as is still possible for simple jobs.
>
> The administrator must take this into account when creating processes in the workflow modeler.

3.5 Sub-jobs or processes

You can add additional sub-jobs to a job or process to map other related activities that are not directly part of the campaign and to track the interdependencies between them.

Sub-jobs are a useful function for dividing complex jobs or processes into smaller and more manageable units. They allow you to edit different aspects of a job or process individually and manage and control them separately. After you create a sub-job, you can edit it as you would a regular job or process.

A sub-job is linked directly on the data sheet of the parent job or process. In the interest of readability, the term “sub-job” will be used synonymously with “sub-process” in the following and the term “sub-process” will be omitted.

> EXAMPLE
> Ron needs to run a campaign for a fashion collection. Parallel to but independently of this, the fees are contractually agreed with the models or their agencies. Ron also needs an on-site caterer. He can organize these two processes through the use of sub-jobs.

Prerequisites Adding sub-jobs is only possible if the underlying parent job type allows it and if the user has the appropriate permissions.

Properties of a sub-job

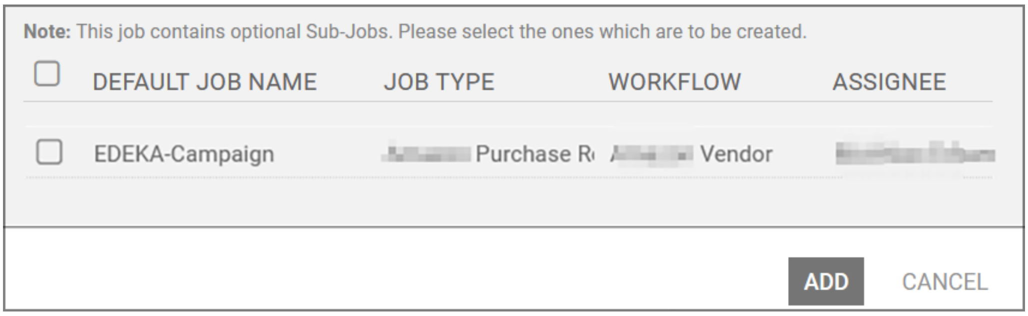
- A sub-job can use a different workflow from the parent job.
- A sub-job uses its own separate data sheet.
- The information and variables required for a sub-job are stored on the data sheet of that sub-job.
- A sub-job can inherit and adopt values from the parent job/process.
- The icon of a sub-job in the overview is 🗁. The icon of a job or process, on the other hand, is 📂.
- A sub-job appears in the job overview and in the dashboard. Except for the easily overlooked icon, it is not externally identified as a sub-job. You can customize the column view for better identification (see *Adjusting the view on page 33*).

- You can open the data sheet of the sub-job like other jobs/processes either directly in the job overview or in the open data sheet of the parent job in the *Sub Jobs* tab.

Creating sub-jobs

There are several options for creating sub-jobs:

- With automatic sub-job creation, the sub-jobs that belong to a job/process are defined in advance and added automatically when the parent job is created. Users do not need to make any further settings, but can simply view and edit the sub-jobs directly in the *Sub-Jobs* tab.
- Sub-jobs can also be created with a job/process. Users are then asked when creating a job whether they want to create optional sub-jobs. They can use a checkbox to select which sub-jobs they need and which they do not need.



- Additional sub-jobs are those that are not fixed to the job or process, but can be added if needed. After clicking on the *ADD SUB-JOB* button in the *Sub-Jobs* tab, users can select from all types that have been defined as permissible sub-jobs for this job type. See *Creating a sub-job* on page 57
- Optional sub-jobs are those that belong to the job or process type by default, but do not always have to be executed. If you are allowed to manually add sub-jobs, you can add optional sub-jobs if the parent job/process is already running. Users can use the *Add Preconfigured Sub-Job* button on the *Sub-Jobs* tab to add one of the sub-jobs stored for this job type with the attribute *Optional Sub-Job*.

Detect inherited content and adjust inheritance

Variables and their contents can be pre-filled by inheritance in the sub-job, i.e. the contents are taken from the parent job. This is defined by the administrator when a job or process type is created.

When opening sub-jobs, you can recognize variable contents inherited from the parent job by the icon after the variable name in the data sheet. While editing the data sheet, you can adjust the inheritance from the parent job type to the inheriting variable.

- Click on after the variable name to finish the inheritance. The last inherited or changed value in the sub-job is thereby retained, even if the value is changed again in the parent job or process.
- Click on to restore the inheritance. However, the entries you made while the inheritance was finished can be overwritten again if they are changed in the parent job.

Navigate between parent jobs and sub-jobs

Use the breadcrumb trail displayed in the upper area of an open sub-job data sheet to open the parent job data sheet.

In our example, the data sheet for the *Supportive Social Media Campaign* sub-job is open and above it, in small font, is the name of the parent job, *Stiletto Collector's Campaign*.

Click on *Stiletto Collector's Campaign* to close the sub-job and return to the data sheet of the parent job.

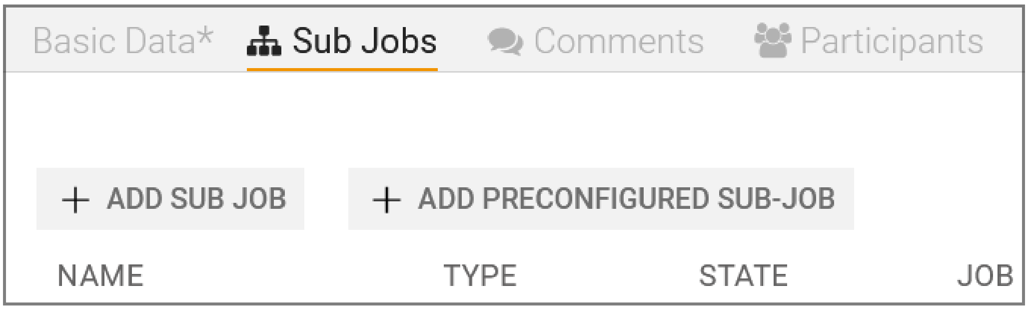
Conversely, you can reach the sub-jobs from the parent job by navigating to the *Sub-Jobs* tab. There you will find a tabular overview of the sub-jobs that is similar in structure and function to the start page of the Job Manager module.

Associated tasks

- *Creating a sub-job* on the facing page
- *Managing sub-jobs* on the facing page

3.5.1 Creating a sub-job

1. Open the Data sheet of the desired parent job.
2. Switch to the *Sub Jobs* tab
3. Click on the *ADD SUB JOB* button to select yourself from a list of given sub-job types.



You have created a sub-job. You now continue in the same way as you created the job. See *Adding a job* on page 41.

Optionally, a second button, *Add preconfigured Sub-job*, is available on the *Sub-Jobs* tab if this is set up in the job type. After clicking on the button, sub-job(s) are automatically created from the selection made.

3.5.2 Managing sub-jobs

Ron has created two sub-jobs and noticed that he no longer needs one of them after all. In the *Actions* column, there is a … menu for each sub-job. There the commands *Edit*, *Delete*, and *Cancel* are available for selection.

- *Edit* : The sub-job is opened for editing.
- *Delete*: The sub-job is deleted from the data sheet of the parent job and is stored under *Deleted Jobs*.
- *Cancel*: The sub-job is not to be finished and the editing is thereby canceled.

EXAMPLE: DELETING A SUB-JOB

1. Open the job data sheet and activate the *Sub-Jobs* tab.
2. Select the sub-job to be deleted.
3. Under the *Actions* column, call up the menu item… > *Delete*.

You have deleted the sub-job from the parent job.

Back to overview:

Sub-jobs or processes on page 54

3.6 Changing the creator

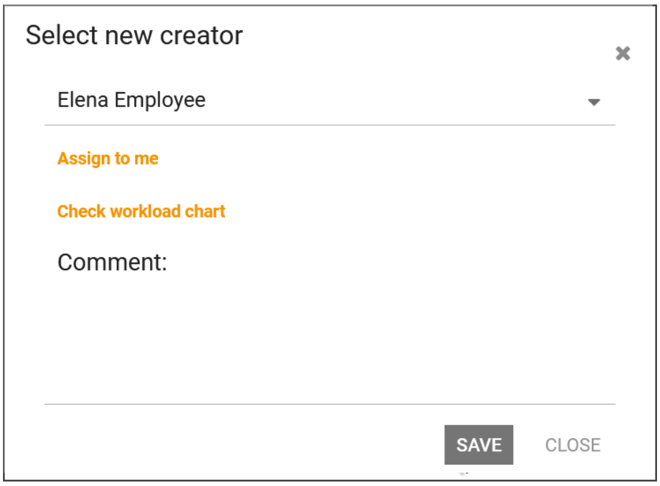
Sometimes it is necessary to change the creator of a job, e.g. if the previous creator is no longer affiliated with the company.

> **Note**
>
> For processes with BPMN workflows, this function is not available due to the predefined process architecture. For processes, only the assignee of the current workflow step can be changed via the … menu > *Change assignee* in the data sheet.

Prerequisites: You are the creator of the job or have corresponding permissions. If you see a pencil icon in the Assignee column in the workflow view in the first step, you are authorized to change the creator.

1. Open the data sheet.
2. Switch to the *Workflow* tab.
3. Click on the pencil icon in the *Assignee* column for the initial workflow step.

   A drop-down list is displayed.
4. In the drop-down list, select another user with the appropriate permission to assume the function of the creator.

5. Optional: Enter a comment.
6. Click on *Save* to confirm your change.

7. Note the security prompt and confirm with *Yes*.

You have changed the creator. The original creator may lose access as a result and is also no longer a participant in the job.

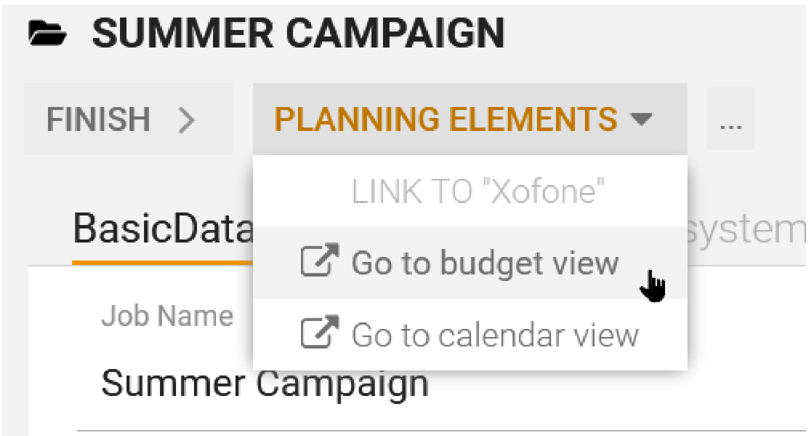
3.7 Interaction with the Marketing Planner

Ron links a job to a planning element in order to connect the strategic planning of a marketing activity with its operational planning. The planning element shows him when and how much budget he needs for a particular campaign. The job shows him how to create and execute the campaign. This is also called “execution planning.” Ron can create or link a job in the Marketing Planner module by selecting or creating a planning element. He will then see a link to the element in the calendar and budget view. If there is no matching sub-element, Ron can create a new sub-element.

PrerequisitesUsers need the appropriate rights and access to planning elements in the Marketing Planner. Only then is it possible to create planning elements, link them to a job, or display a linked planning element in the calendar or budget view.

View in the data sheet

If a job/process is linked to a planning element, this is shown on the open data sheet in the header by means of the *Planning Elements* button of the same name. Below this, you will find a menu.



Click on *Planning elements* and select *Go to calendar view* or *Go to budget view* in the drop-down list shown to display the planning element in the respective view.

For better orientation, you will find the name of the linked planning element in the top line of the menu.

When is synchronization carried out?

As part of the synchronization of planning elements with jobs or processes, the Planner updates timelines and budgets. Budgets and timelines in the planning module are continuously adjusted to the actual costs and times of the job.

Changes to the planning element data are adjusted even if the process data sheet is still open or is being saved. The data is written to the target fields without buffering.

Associated tasks

- *Linking to a planning element in the Marketing Planner* below

3.7.1 Linking to a planning element in the Marketing Planner

Ron wants to align the goals and activities of a job with the marketing strategy. Linking to a planning element in the Marketing Planner module is a function that allows him to link a job to a specific element of the marketing plan. This allows the effectiveness and success of the job to be measured and optimized based on KPIs.

When a link is created, the job is added in the Marketing Planner in the detailed view of the element on the *Tasks* tab.

> Note
>
> There are two different options for linking a job to a planning element: manually via the *Link Planning Element* function or automatically via the configuration *Synchronize with Marketing Planner* in the workflow configuration of the job type by the administrator.
>
> Please note that the manual function is technically always available in the job data sheet menu, even if it is not necessary or desired. This requires careful handling in order to avoid errors or inconsistencies when manually unlinking an automatic link or creating a manual link that does not match the automatic synchronization.
>
> If you are not sure whether manual linking is allowed or not for a particular job type, please contact your administrator.

Transferred data

When a link is created, the following data is transferred:

In the Job Manager on the data sheet	In the Marketing Planner on the *Tasks* tab Column
The *Job Name* field on the *Basic Data* tab	Name
If filled in: the *Due Date* field on the *Basic Data* tab If Due Date is not filled in: current date	Date
User that created the link	Responsible person
Current workflow step	Status
The *Description* field on the *Basic Data* tab	Notes
Selected job type	Type
Selected workflow	Workflow

Associated tasks

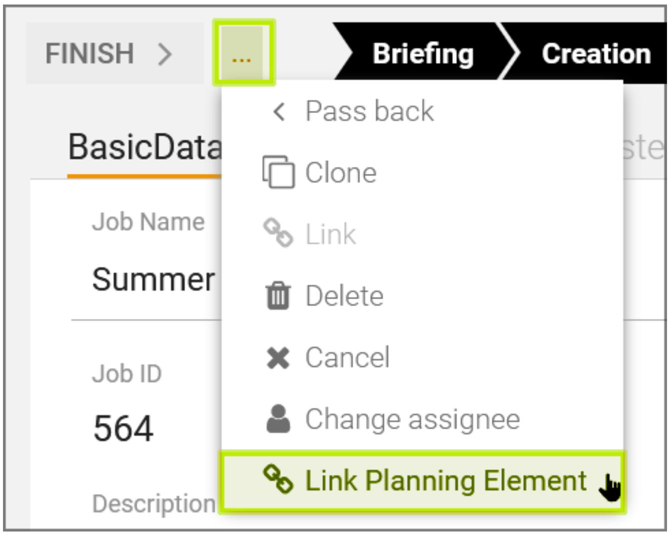
- *Creating and linking a sub-element* below
- *Creating a link to an existing planning element* on page 66
- *Using linked planning elements* on page 68

3.7.1.1 Creating and linking a sub-element

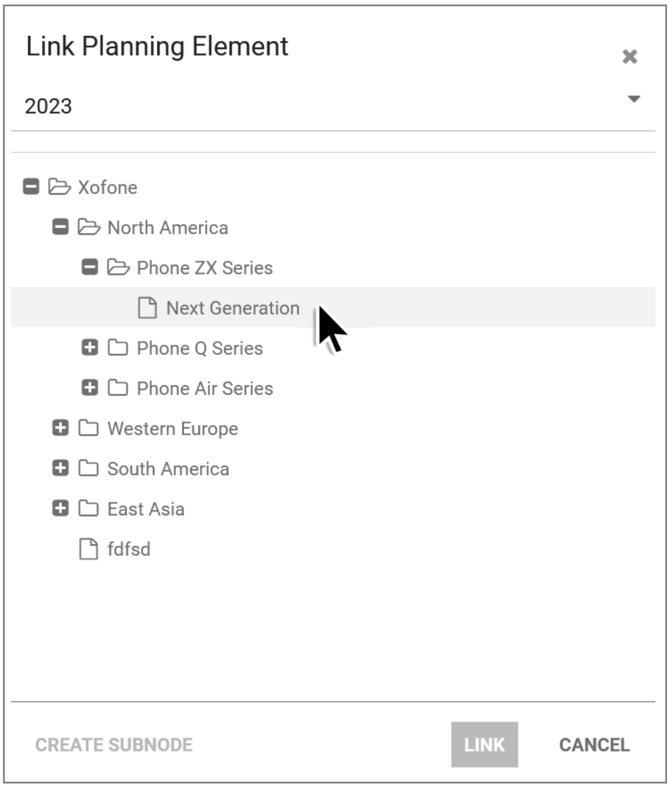
If there is no suitable planning element that you can link to the job/process, create a suitable new sub-element.

The *Create Subnode* button is located at the bottom left of the dialog box *Link Planning Element*.

1. First, open the desired job to create a link to a new sub-element in the Marketing Planner.
2. Click on ··· above the data sheet to open the function menu.
3. Select the menu item *Link Planning Element*.



This opens the dialog box *Link Planning Element*.



4. Click on the triangular arrow ▾ to open the menu and select a year there with which you want to link the job/process to the planning element.

   Below you will find the expandable folder structure of the planning elements and the folders contain the planning elements. The planning elements of the selected year are displayed.

5. Select the parent element.
6. Click on the *Create Subnode* button.

The *Create Subnode* dialog box opens.

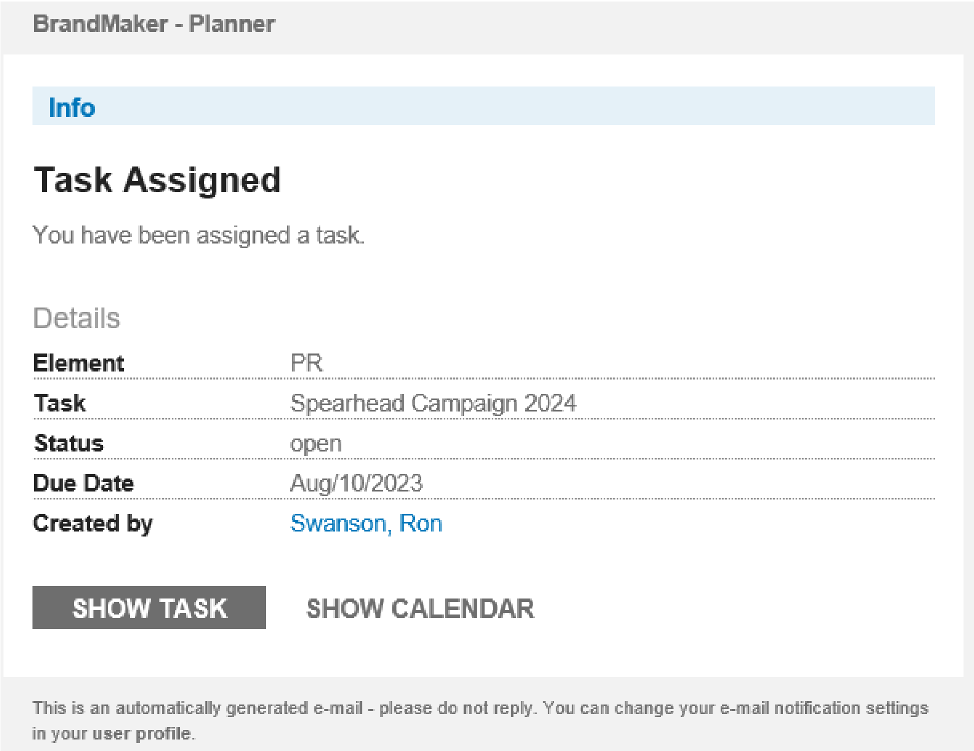
7. Enter a name for the new planning element and confirm your entry by clicking on *OK*.

   The new planning element will be created as a sub-element.

   If you need additional sub-elements, repeat steps 5 to 7 until all of the required planning elements have been created.

8. In the tree structure, select the newly created planning element to which you would like to link the job/process.
9. Click on *Link*.

You have made a link to a newly created sub-element. The entry *Planning elements* is now available in the button bar above the job data sheet. You will be notified that a new task has been assigned to you in the Marketing Planner.



Note

The following should be noted when creating sub-elements:

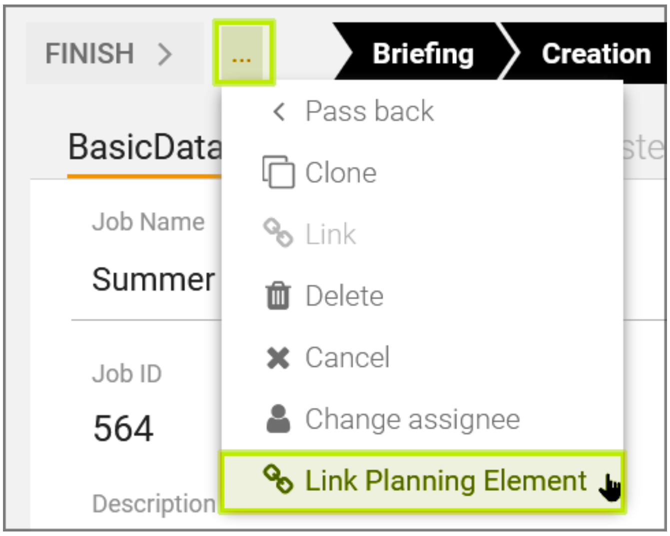
- The name of the element is entered in the Job Manager module when the link is created.
- In the Marketing Planner, the person who created the link in the Job Manager is entered as the *Responsible person* under *General*.
- The runtime of the created planning element starts with the year of its creation and ends with the runtime of the parent element.
- The working currency and user groups with access rights are taken from the parent element.
- Dimensions and key figures are taken from the parent element.
- The associated job/process is automatically listed as a task in the newly created element under the *Tasks tab* in the Marketing Planner. Click on *Edit details* to open the job data sheet from here.
- Other properties such as external ID, time periods, etc. remain unfilled.

If these properties need to be added, you will need to edit the planning element in the Marketing Planner.

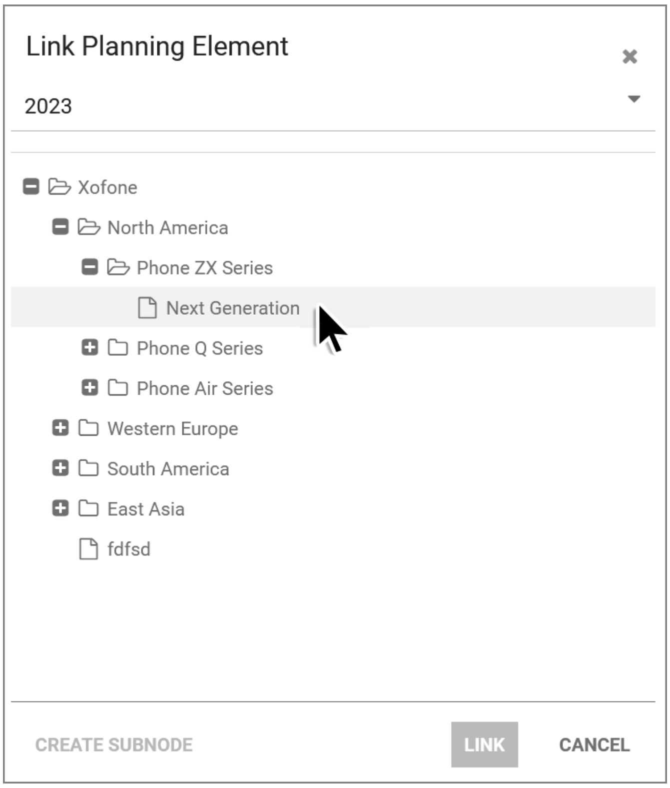
3.7.1.2 Creating a link to an existing planning element

Existing planning elements can be located in the dialog box in an expandable folder structure and linked to the job.

1. First, open the desired job to create a link to an element in Marketing Planner.
2. Click on ⋯ above the data sheet to open the function menu.
3. Select the menu item *Link Planning Element*.



This opens the dialog box *Link Planning Element*.

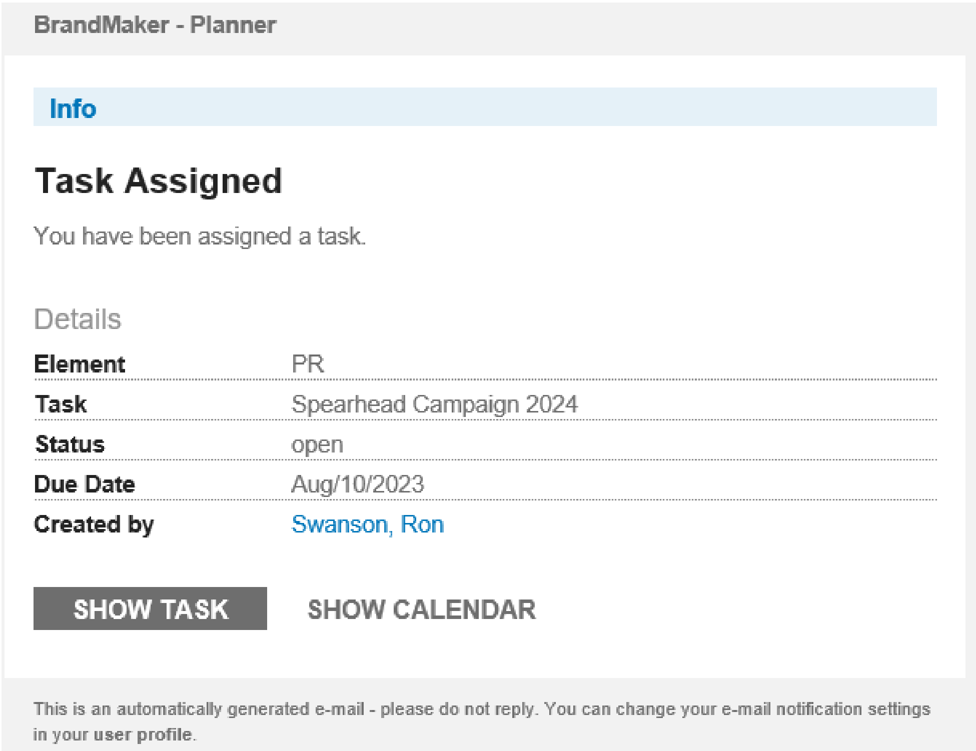


4. Click on the triangular arrow ▼ to open the menu and select a year there with which you want to link the job/process to the planning element.

   Below you will find the expandable folder structure of the planning elements and the folders contain the planning elements. The planning elements of the selected year are displayed.

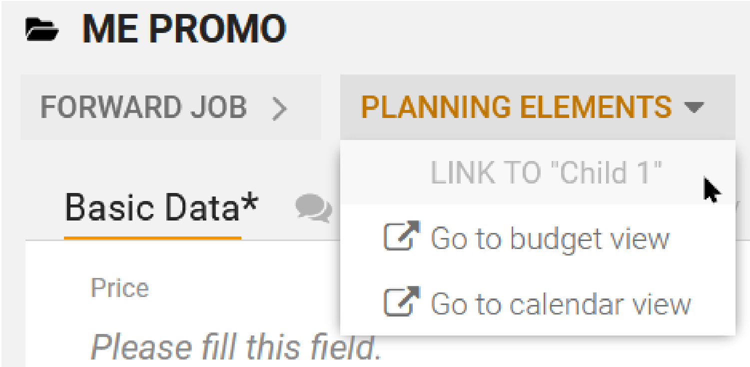
5. If the planning element has already been created in the Marketing Planner: Find the desired entry in the drop-down list by expanding the parent elements and select this entry.
6. Select an existing planning element.
7. Optional: In the open folder for a campaign, you can also use the *Create Subnode* button to create a new planning element at this hierarchy level. See *Creating and linking a sub-element* on page 63.
8. Click on *Link*.

You have created a link to an existing planning element. The entry *Planning elements* is now available in the button bar above the job data sheet. You will be notified that a new task has been assigned to you in the Marketing Planner.



3.7.2 Using linked planning elements

After linking, you can switch to one of the two views of the Marketing Planner with the planning element with one click in the job data sheet:



1. At the top of the job data sheet, click on *Planning elements*. In the menu title, you will find the name of the linked element and below it the menu commands to display the element in the budget view and the planning view of Marketing Planner.

The desired *Budget* or *Calendar* view will be opened in the Marketing Planner.

Conversely, you can also access the data sheet in the budget and calendar views of the Marketing Planner:

1. Right-click on the linked planning element.

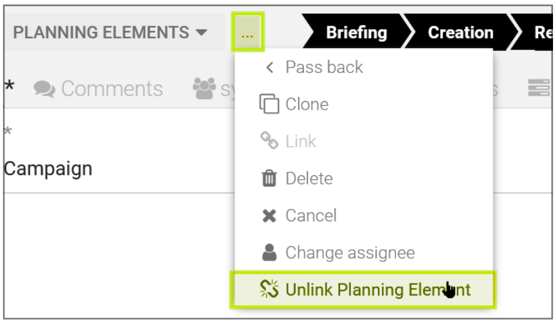
   This will open the *Edit Element* context menu.
2. Select *Edit Job* to open the job data sheet.
3. Make changes.
4. Close the data sheet by clicking on the close field ✕ .

You have opened the job from the Marketing Planner and will then return to the previous view in the Marketing Planner. For a complete description, please refer to the Marketing Planner User Help 7.4.

3.7.3 Removing a link to a planning element

Ron has realized that he accidentally selected and linked the wrong planning element. He wants to manually remove the incorrect link to a planning element in the Marketing Planner in the open data sheet of the job. To do this, he needs to perform the following steps:

1. Open the data sheet of the job/process whose link you would like to remove.
2. Open the ... menu at the top of the data sheet.
3. Click on *Unlink Planning Element*.



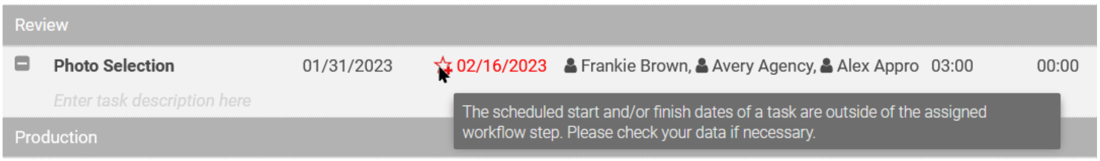
The link will be removed. Only now can you link the correct planning element. The job/process is then no longer entered as a task in the Marketing Planner in the detailed view of the originally linked element.

3.8 Task Manager

Whenever Ron knows he can better break a workflow step into smaller individual tasks that are processed by different people, he uses the Task Manager in the Job Data Sheet. The Task Manager can help him structure and prioritize work, while sub-jobs can help Ron optimize how workflows are executed by having jobs run in parallel. He can also use the Task Manager in sub-jobs to assign tasks to workflow steps.

How the Task Manager works

The individual workflow steps are clearly displayed in the Task Manager in tabular form.



Depending on the configuration of the type, tasks are either created automatically from a template together with the job/process or later created manually by an assignee and assigned to the relevant workflow steps. In addition, tasks can be added in the *General* area independently of a workflow step.

> **Note**
>
> The Task Manager is not available by default on the data sheet or on a data sheet tab. It must be created as a field function when creating the job or process type.
>
> Prerequisite: The *Task Manager* field is used on a tab in the data sheet. The Task Manager can be identified via a large table of workflow steps on a tab of the data sheet (see *Layout* on the next page).

The Task Manager can be used to complete the following actions:

- Automatically create tasks for each workflow step through the use of task templates
- Record the planned and actual work time required for each task
- Set start and end dates for the tasks and the corresponding workflow steps
- Assign tasks to users for processing

EXAMPLE

One example of a workflow step with multiple tasks is *Creation*. This workflow step includes the tasks *Image Editing*, *Image Selection*, *Layout* and *Editing*. These tasks have been assigned to individual teams through a task template and can be viewed in the dashboard. Team members in the graphics department see an open *Image Editing* task in the dashboard and can take it on independently if the team member who would otherwise complete the task is unavailable.

Layout

The following table describes the information available in each column of the Task Manager.

In addition, you can specify a task description under the entries in each column.

Column title	Description
Name	This displays the name of the workflow step and the name of the corresponding task.
Start	This displays the start date on which you want the task to begin. Note: A warning appears if the start date is before the start date entered for the corresponding workflow step. However, you can edit the job/process and the task as required despite the warning.

Finish	This displays the planned completion date. Note: A warning is displayed in red if the *Finish* date is after the end date of the corres-ponding workflow step or if a workflow is forwarded to the next step before the task is completed. However, you can edit the job/process and the task as required despite the warning. Example of a warning: 01.02.2023
Assignee	This displays the user selected as the Assignee.
Planned	This displays the estimated required work time (in hours) that is scheduled for the completion of the task.
Actual	This displays the actual work time required for the task. Note: The value is transferred from the time recording of the responsible assignee. However, you can also enter it yourself on the data sheet.
Remaining	You can calculate the differ-ence between *Planned* and *Actual* and enter it in this field.

Status(icon)	The status of the task selected by the assignee is displayed (*Paused*, *Done*, *Open*, *Cancelled*, *In progress*, *Planned*). Move the mouse pointer over the respective colored icon to see the detailed status.

Button bar and menu ▾

The drop-down menu *Menu* ▾ at the end of the button bar in the Task Manager allows you to access these commands:

Button or menu command	Description
Add Tasks	This creates a new task below the task that is currently selected. If no task is selected or if the workflow step does not contain a task, then the task is created below the last workflow step. Tasks can be assigned to a different workflow step by dragging and dropping them.
Delete Tasks	This deletes the task that is currently selected.
Change Status ▾	This allows you to assign a new status to the selected task (*Paused*, *Completed*, *Open*, *Canceled*, *In Progress*, *Planned*). Please note that time recording is no longer possible with the statuses *Done* and *Canceled*.
Menu ▾	You can access the following functions using the menu commands:
Expand all	Any existing tasks below the workflow steps are shown.
Collapse all	The tasks displayed below the workflow steps are hidden.
Insert from Template	This opens the *Import Task Template* dialog box, in which you can select a new task template from saved task templates. When you insert tasks from a template, the existing tasks are retained and the new tasks are added. If the tasks are not added to the desired workflow steps, sort the tasks by drag-and-drop.
Save as Template	You can save the tasks you added to the workflow steps as a template and reuse them in the future.

Scheduling	You can use this function as a convenient way to move all the start and end deadlines that have already been entered, e.g. if the start date has been postponed. To do this, the workflow must not have started yet. Select the start date or end date of a task as the reference date and move it to a new date. All entered dates will then be shifted by the same period as the reference date. Weekends are taken into account when shifting.
Time Tracking period Lock Date	If time recording must be locked for a job/process, e.g. for the creation of a report or for billing, use this function to set a date from which time recording is no longer possible. This date can be changed.

Note

You need the corresponding right in your user role to be able to save tasks as task templates.

Associated tasks

- *Creating a task* below
  - *Changing the assignee of a task* on page 77
  - *Deleting the assignee of a task* on page 77
  - *Saving a task as a template* on page 78
- *Importing tasks from a template* on page 78
- *Assigning a task to a workflow step* on page 79
- *Rescheduling tasks* on page 145
- *Changing the task status* on page 146

3.8.1 Creating a task

Some workflow steps can be handled better and faster if they are split into multiple subtasks. Ron uses tasks for this purpose.

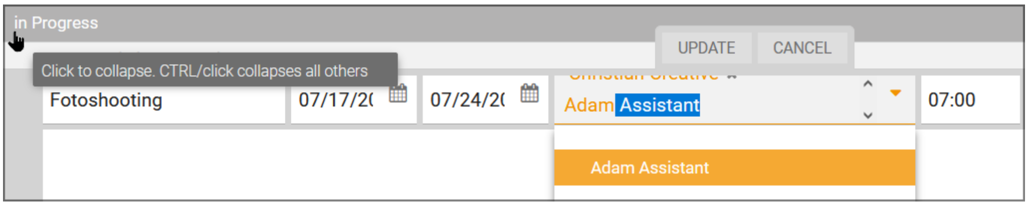
Creating a task

In a job, you want to add the new task *Photo Selection* to the workflow step *Review*. You estimate the work time required to complete the task to be 2 hours. You want to assign the task to a group of four selected users.

Prerequisite: You are currently on the Task Manager data sheet.

1. Click on *Add Tasks*.

   A new line with the entry is created in the Task Manager at the end of the list.
2. Enter *Photo Selection* as the name for the task.
3. Drag and drop the task onto the workflow step *Review*.

4. Use the input field in the *Assignee* column to search for the four users to be entered and add them one by one.
5. In the *Start* and *Finish* columns, enter the start and completion dates using the date picker or enter them in DD.MM.YYYY format.
6. In the *Planned* column, enter the value *2* for the work time.
7. Click on *Update*.
8. Optional: If you do not want to permanently assign the new task to a workflow step, leave it where it is. It can still be taken on by the assignee.

The new task is created according to your entries. All users entered for the task will be informed by notification or e-mail and can call it up in the job overview under *Tasks*.

> Note
>
> If you select a task already assigned to a workflow step, the next new task you create with *Add Tasks* will automatically be linked to this workflow step.
> Tasks can be moved and assigned to a workflow step by dragging and dropping them. Information is displayed next to the mouse pointer during the task and you can release the Task over the bar of the desired workflow step. Hold the SHIFT key down to select and move multiple tasks.
> You can use the ESC key to undo the last entry in a field of the Task Manager as long as the field is active.

Associated tasks

- *Changing the assignee of a task* on the facing page
- *Deleting the assignee of a task* on the facing page

- *Saving a task as a template* on the next page

3.8.1.1 Changing the assignee of a task

Assignees have already been assigned in the Task Manager, but Ron would like to adjust that assignment. Ron Swanson wants to take over the *Upload Images* task himself and enter himself as the assignee.

1. Open the data sheet and switch to the tab for task management.
2. Click on the bar of the workflow step that contains the task.

   The task is shown.
3. Double-click on the line of the task.

   This activates edit mode for the task.
4. Click on the input field in the *Assignee* column.
5. Type the first few letters of the name of the user who is to take over the task.
6. As soon as the desired user is shown, press ⏎.
7. Click on *Update*.

The selected user is entered as the assignee.

The user is notified by the system about his new task.

3.8.1.2 Deleting the assignee of a task

An assignee must be deleted because they are currently unavailable.

1. Open the data sheet and switch to the tab for task management.
2. Click on the bar of the workflow step that contains the task.

   The task is shown.
3. Double-click on the line of the task.

   This activates edit mode for the task.
4. Click on the × icon after the user name.

   The user is removed from the task.
5. Click on *Update*.

You have deleted the user from the task. The user will be notified about this by the system.

3.8.1.3 Saving a task as a template

Ron has chosen to save elaborately created tasks for later use so that they can be reused for similar workflows by all fellow employees who create and configure jobs.

1. Open the data sheet and switch to the tab for task management.
2. Select *Menu* ▾ > *Save as Template*.

   The *Modify Template* dialog box opens.
3. Enter a name and optionally a description of the task template you wish to save.
4. Click on *Save*.

You have saved the tasks of this job as a template for future reuse.

3.8.2 Importing tasks from a template

Ron often uses tasks from a previous campaign, so he has saved them as a task template. This allows him to configure a newly created job more quickly.

> Note
>
> If a corresponding template has not yet been stored, an alternative is to copy an existing job and thereby transfer the tasks to the copy.

1. Navigate to the Task Planner in the job data sheet.
2. Select > *Menu* ▾ > .*Insert from Template*.

   The *Import Task Template* dialog box opens.
3. Select a template from the drop-down list and confirm with *Load*.

   Note: To use a task template with a workflow, the number of task steps and workflow steps must match.

   The *Scheduling and Shifting* dialog box opens.
4. Select the first task of the import from the drop-down list *Reference Point* .
5. From the drop-down list *Date*, select the entry *starts at*.
6. Select a date using the date picker.
7. Confirm by pressing the button *Calculate*.

8. Optional: Select the entry *ends at* to schedule the tasks backwards from the specified date.

   The imported tasks are placed below the respective workflow steps.
9. Click in the *Assignee* column of each task, use the search function, and add the desired people as assignees.
10. Optional: Enter the estimated work time required under the *Planned* column.

You have imported a saved task template and distributed it to the workflow steps of the open job.

3.8.3 Assigning a task to a workflow step

A newly created task is initially located at the bottom of the Task Manager. You have to assign it to the workflow step where it belongs.

1. In the open job data sheet, open the tab for task management.
2. You have several options to customize the view and select tasks:
   - Click on *Menu* ▾ > *Expand all* to show the tasks already assigned to all workflow steps.
   - If you click on the gray bar of a workflow step instead, you can show the tasks for that workflow step only.
   - Hold down CTRL or CMD while clicking on the bar of a workflow step to show the associated tasks for this workflow step while minimizing all other expanded workflow steps.
   - Hold down CTRL or CMD while clicking on the plus in front of an entry to show or hide the task description line.

You have assigned a task to a workflow step.

3.9 Forwarding a job

In the Job Manager, users can assign and forward the workflow step to others after completing their tasks. For example, Ron has just completed the first workflow step and now needs to forward the job/process to the next person responsible. To do this, he must first fill in all the mandatory fields, such as the deadline, campaign description, and item number. The application checks that all mandatory fields are filled in before Ron can complete the workflow step and forward it.

Who do I forward to?

Depending on the workflow configuration, a job/process can be forwarded to either a user or a group.

- You can assign a job/process to a user. This user is then responsible for the next workflow step as the assignee.
- You can assign the job/process to a group. In this case, the job/process is displayed for all the members of the group in the *Available Jobs (PickList)* or *Available Tasks (PickList)* dashlet. Any member of the group can accept the job/process as an assignee or assign it to a different member. You can find more information under *Dashboard* on page 25.

How do I forward?

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

- In the data sheet in the header with the *Forward job* button. Regardless of which tab you are working on, this option is available everywhere while editing the data sheet. See Forwarding a job/process in the data sheet via the header
- On the *Workflow* tab in the data sheet. If you want to forward over several steps, see *Forwarding a job on the Workflow tab* on page 83
- Using drag-and-drop in the Kanban view. If you prefer Kanban for displaying the workflow, see *Forwarding jobs by drag-and-drop* on the facing page

> Note
>
> Note that you may lose access to the job/process when you forward and return it.

Next steps

After you have created the job/process and forwarded it to the next workflow step, another user usually takes over the processing. The new assignee is notified by the system via e-mail. There is also a system notification with the content of the e-mail under the bell icon in the module navigation at the top right.

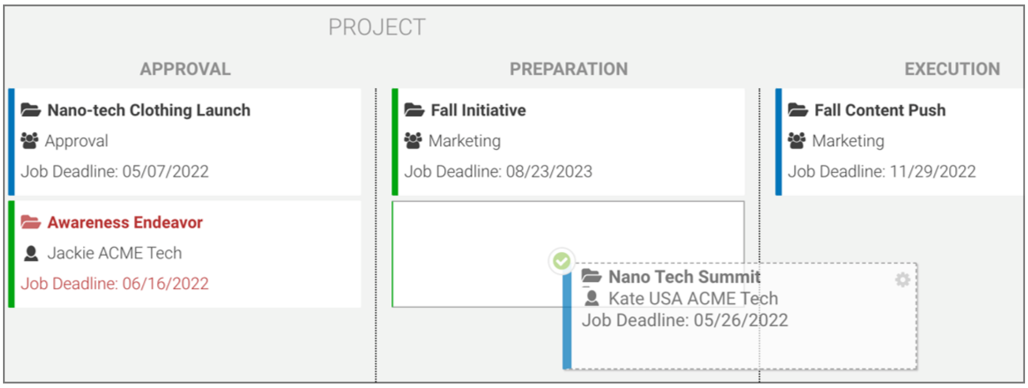
3.9.1 Forwarding jobs by drag-and-drop

Ron uses the Kanban view to track the progress of his jobs. Here, the jobs are arranged by workflow. This view allows him to graphically display the workflow steps in the form of tiles and shows him what status the jobs are in. For example, he can use this view to see all the jobs in the workflow step *Creation* arranged vertically in a column and drag and drop them upwards or downwards to prioritize them accordingly. Ron can drag tiles from one column to another to forward them to the next workflow step without having to open the job. He does this when he completes a workflow step or when he needs to return the assigned job. If necessary, he can also forward more than one step if needed.

> Note
>
> Processes are shown in the module's Kanban representation in read-only mode. This means that processes cannot be dragged and dropped into another workflow step. You can recognize processes by the ⓘ following the process name in the header. Instead, open the data sheet in the Kanban view by double-clicking on the tile and follow the following description Forwarding a job/process in the data sheet via the header.

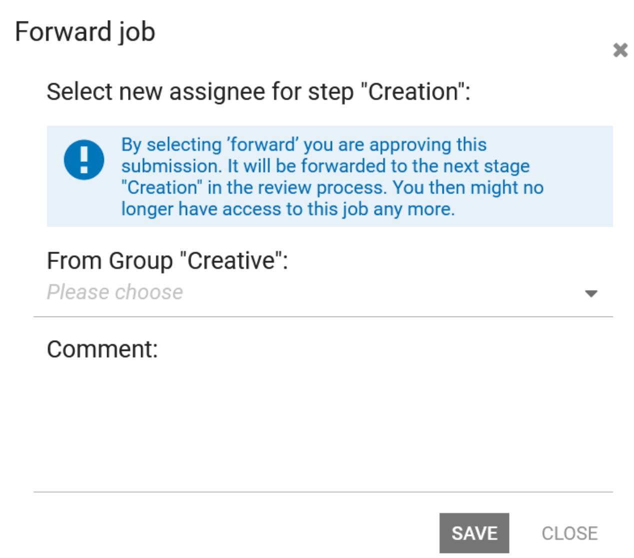
Prerequisite: You have saved your entries by clicking on Save. Note that forwarding over multiple steps requires the appropriate right for your user role. If you are not allowed to move the workflow step, or not allowed to move it as far as you want, a red indicator will appear in the upper left-hand corner of the tile when you start with a drag-and-drop operation.

1. In the job overview, open the Kanban view.
2. Go to the board where the job that you want to forward is displayed.
3. Use the drag-and-drop function to drag the job to the step to which you want to forward it.



The green visual indicator in the upper left-hand corner shows whether it is possible to forward to the step below.

The *Forward job* dialog box opens.



The *Assignee* field is pre-filled if an assignee was entered for the next work-flow step during planning.

4. Keep the pre-filled assignee or select a different user or group from the drop-down list. To open the drop-down list, click on ▾ at the end of the field.
5. Optional: By *Checking the workload* on page 51, you can determine if the user has enough time.
6. Optional: Enter a comment for the assignee.

   The comment is displayed on the data sheet in the *Comments* tab in the main job discussion and in the sidebar.
7. Click on *Save*.

You have forwarded the job to the next workflow step. The assignee(s) will receive a system notification and, if enabled, a notification in their e-mail inbox.

3.9.2 Forwarding a job on the *Workflow* tab

Marketing manager Ron has opened a running job in the workflow step *Creation*. As the budget has been cut, he should use the old campaign with the same images as last year. This way, he doesn't need to create or share any new images.

He therefore decides to skip the workflow steps that deal with creating and approving images and wants to forward the job directly to the workflow step *Publish* .

> Note
>
> Please note that your role may not have the permission to forward a job over multiple steps. You can only perform this action if your user role has the appropriate right.

Prerequisite: You have saved your entries by clicking on Save.

1. Switch to the *Workflow* tab or click on WORKFLOW in the navigation bar.
2. This opens an overview of all workflow steps defined for the job.
3. Click on the *Forward to this step* button in the line of the step to which you want to forward the workflow.

   The *Forward job* dialog box opens. The *Assignee(s)* field is pre-filled if an assignee was entered for the next workflow step during planning.
4. Keep the pre-filled assignee or select a different user or group from the drop-down list. To open the drop-down list, click on ▼ at the end of the field.
5. Optional: With Checking the workload, you can determine if the user has enough time.
6. Optional: Enter a comment for the assignee. When doing so, enter all relevant information, such as the reason for forwarding, the changed circumstances (workflow steps skipped), and the status.

   The comment is displayed on the data sheet in the *Comments* tab in the main job discussion and in the sidebar.
7. Click on *Save*.

You have forwarded the job to the next workflow step. The assignee for the workflow step is automatically notified of the forwarding via e-mail and system notification.

3.9.3 Returning

You can reject the processing of a workflow step and return it. This is useful if you do not have the necessary information to edit the data sheet or are prevented from doing so due to deadlines. When returning, the previous assignee is suggested as the workflow target. You can also select another recipient. To open the drop-down list, click on ▾ at the end of the field.

1. In the opened Data sheet, call up the …Menu.

   If configured accordingly, the menu command *Pass back* appears.

2. Click on *Pass back*.

   A dialog box opens.

3. Enter the assignee and optionally enter a comment to explain the reason why the workflow step is being returned.

4. Click on *Save*.

   The workflow step is returned and the previous workflow step is now the current one again.

5. Optional: Switch to the *Workflow* tab to go back multiple workflow steps.

6. Click on the *Pass back to this step* button in the line of the step to which you want to forward the workflow.

   A dialog box opens.

7. Enter the assignee and optionally enter a comment to explain the reason why the workflow step is being returned.

8. Click on *Save*.

   The workflow step is returned over more than one step.

9. Optional: In the Kanban view, drag the tile of the workflow step in question over the column of a previous step.

10. Release the tile in the desired step. The *Pass back* dialog box opens and you proceed as in steps 3–4.

The workflow step is returned and the previous workflow step is now the current one again.

Note

In the *Workflow* tab of the data sheet and in the Kanban view, you can skip several steps at once when returning if the required right is enabled for your user role.

Diese Seite wurde absichtlich leer gelassen, um sicherzustellen,

dass neue Kapitel auf einer rechten (ungeraden) Seite beginnen.

4

Editing a job

Ron has finished the initial step and forwarded the job to Elena. Elena receives a notification via e-mail and in the application. She thereby finds out that she is the next assignee for the job. To complete the job, she completes a sequence of activities. The activities and tasks are described in this chapter:

- Elena sorts by criteria such as name, status, due date, or priority. This helps her find the job faster. She also applies filters to list which jobs she currently has to complete. See *Searching jobs and filtering results* on page 94.
- She opens the job by clicking on the job name or the *Edit* button. She thereby opens the data sheet, in which she can find all the important information about the job, such as the customer, requirements, attachments, or comments. See *Opening a job* on page 110.
- Elena edits the content of the data sheet by clicking on the available tabs, fields, and buttons. She then enters the relevant data or edits existing entries. If necessary, images or documents can be attached to the job. See *Editing a data sheet* on page 111.
- Elena communicates with her colleagues by adding comments to the job or answering questions. She can ask questions or give feedback. She can see who else is involved in the job or who has already worked on it. See *Interacting with colleagues* on page 136.
- When she completes the workflow step, Elena forwards the job. In so doing, she hands it over to another colleague or a supervisor. She returns it if she received it by mistake or if she is unable to process it. See *Forward or return?* on page 157.

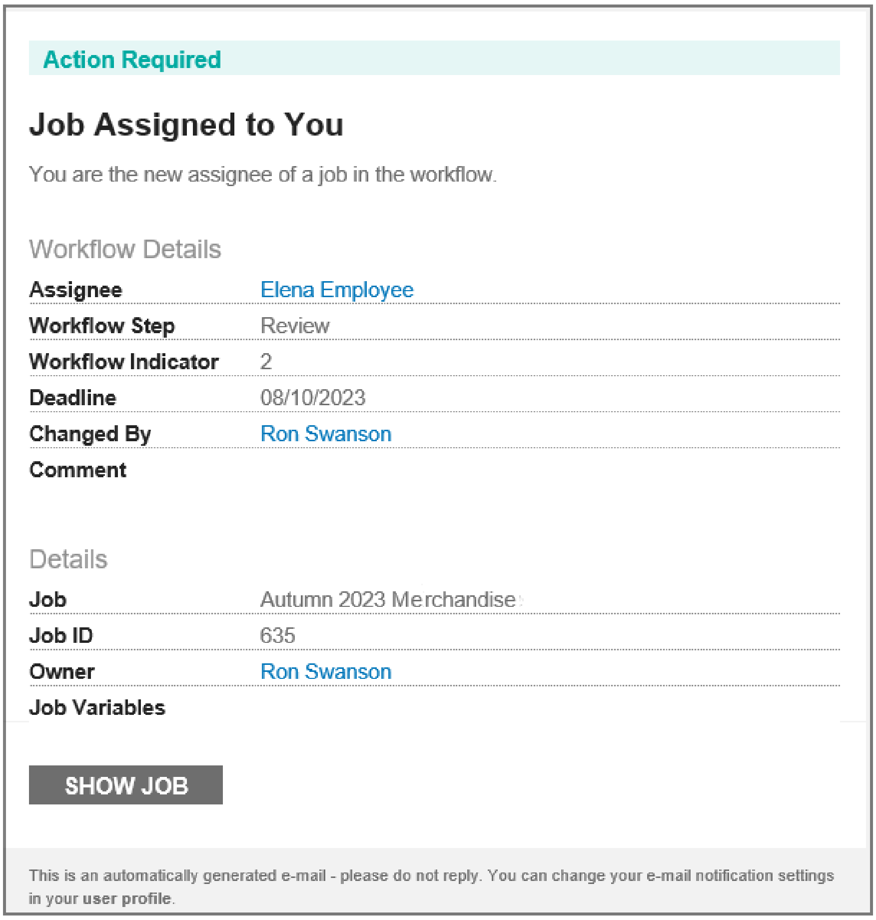
4.1 How do I know when a job has been assigned to me?

Elena works as an art director at an advertising agency. She is responsible for various projects that she carries out in collaboration with other colleagues. Elena is assigned jobs through the Job Manager. This way, she knows which jobs she has to do next and which deadlines she has to meet. Whenever Elena is assigned a new job, she receives a notification via e-mail. She can then view the details of the job, such as the client’s name, the purpose of the design, the format requirements, and the content. Elena can also see which other designers are involved in the project and the workflow step she should do the groundwork for.

For example, Elena may be asked to design a brochure that was drawn up by another colleague. Or that she may be asked to edit a graphic that was created by another colleague. This chapter describes how Elena can find out which jobs have been assigned to her for processing the current workflow step or as a participant.

How to open a job from an e-mail

Once a workflow step of a job is assigned to you for processing, the system usually automatically sends an e-mail with a link that takes you directly to the job and opens the data sheet:



Click on the *View Job* button at the bottom of the e-mail.

The Job Manager module will load and you will then see the open job data sheet. You do not need to know the name of the job to be processed or where it is located.

E-mail deleted or not received?

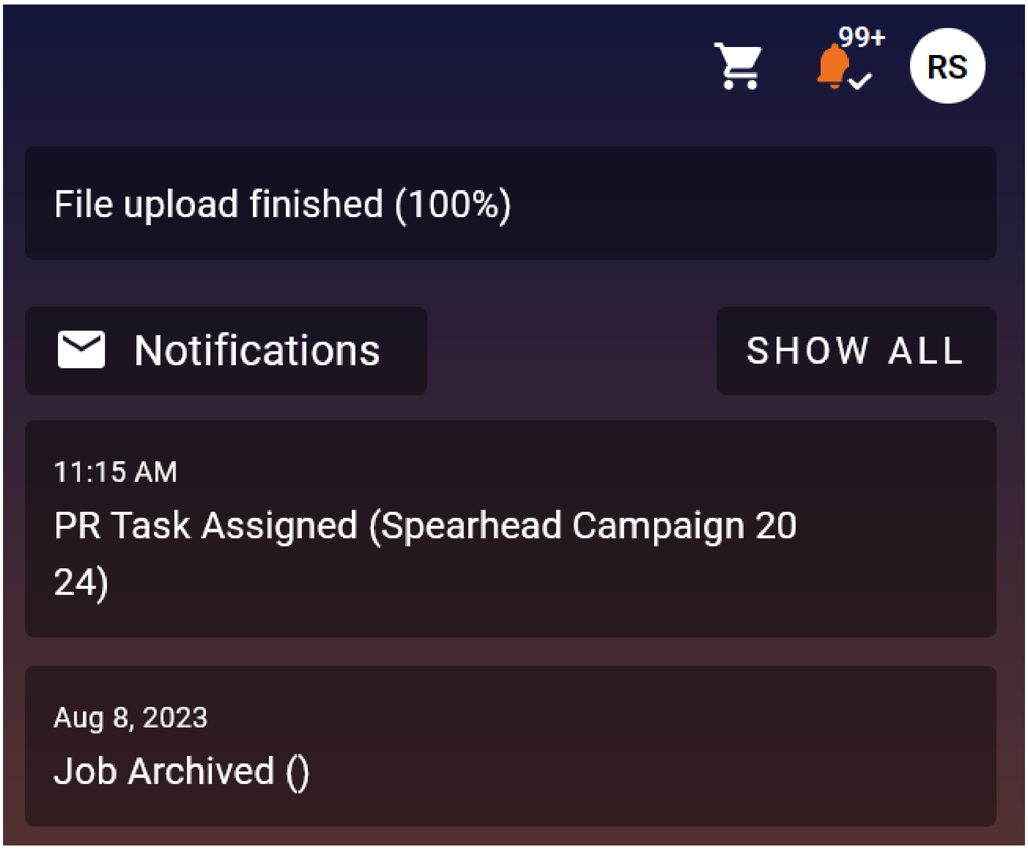
> **Note**
>
> The system usually informs you about important events by e-mail. It may be that your organization has completely disabled the e-mail service. In this case, no notification e-mails will be sent on behalf of the Job Manager module either. However, if the e-mail notifications flood your inbox, you can decide whether or not you want to continue receiving these notifications in the main navigation of the system by clicking on your initials in the upper right corner under *User Settings* > *Settings* > *Notifications*.

If you have already deleted the notification e-mail, did not find it, or did not receive it for the reasons mentioned above:

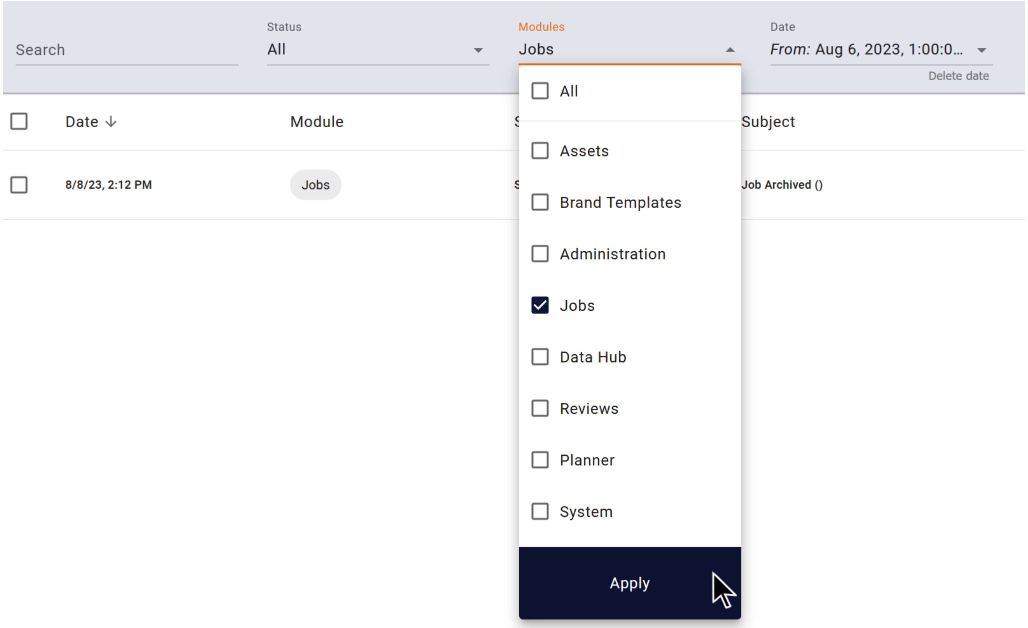
1. In the system, click on the bell icon next to your initials in the top right corner of the main navigation.

   The sidebar with notifications will appear.

2. Then click on the *Show All*button in the upper right-hand corner.



3. In the search and filter bar at the top click the column *Modules* and set the filter to *Jobs* in the drop-down menu.
4. Click *Apply*.



This way, only notifications for jobs will be displayed. You can recognize a newly assigned or previously unprocessed job or task in the overview of notifications if *Task assigned* or *User task active* is indicated in the *Subject* column. You can also sort the notifications by date or narrow down the date range using the date picker under *Date*.

Double-click on an entry in the notifications to see the same content as in a notification e-mail and click directly on the link to the job.

Filtering in the job overview

To see the jobs assigned to you, you can use the filter menu in the job overview. In the filter menu at the top left, select the standard filter *My Active jobs (ToDos).*

This will only show the jobs for which you are the assignee of the current workflow step.

Using the dashboard

In the dashboard, you can also find all jobs for which you are entered as the assignee of the current workflow step.

1. In the module navigation, click on *Dashboard*.

   The dashboard is loaded.

2. If the heading is collapsed, click on the downward-pointing triangle ▾ in the *My Active jobs (ToDos)* bar.
3. Click on an entry to open the job data sheet.

You have searched for and opened an assigned job in the dashboard.

Searching for jobs

You may need to do a little more work to find the job you need. The chapter *Searching jobs and filtering results* on the next page explains the search functions of the *Job Manager* module.

4.2 Searching jobs and filtering results

Ron is responsible for planning and executing campaigns for various products and services at his company. To keep an overview of what's going on, he uses Job Manager. Ron has opened the job overview. There he finds a list with information about all the jobs he has created or been assigned and can filter and sort them according to various criteria.

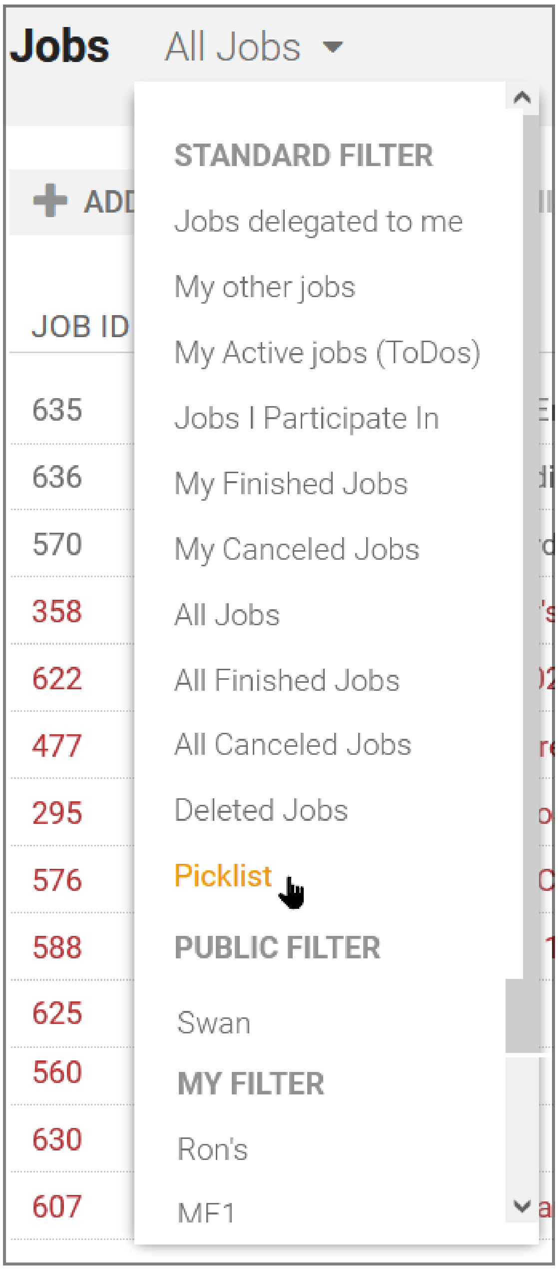
Using filters and the search functions, Ron can narrow down the listed jobs.

- Ron selects a filter to narrow down the overview based on predefined criteria or criteria he has saved after an advanced search. The filter menu allows him to display only jobs in a certain processing status or, if he has previously saved his own filter for this purpose, only jobs that belong to a specific customer. See *Filtering jobs* on the facing page.
- Ron uses the simple search as a quick way to search for a specific term or combination of terms in the current filter view. See *Simple search* on page 108.
- Ron uses the advanced search to define complex search requests based on a combination of multiple search criteria, which he can save and reuse as a filter. He can use the filter for himself only or make it available under *Public Filters*, thereby making it accessible to other users. See *Advanced search* on page 105.
- To organize his work, Ron has assigned different categories to his jobs and processes on the data sheet. *Filter by Category* allows him to filter in an existing filter view or based on the result of a search for jobs and processes to which the selected category is assigned. See *Filtering by category* on page 102.
- Ron needs a list of all jobs based on the type *Online Campaign*. To view only specific job/process types, he uses the menu *Filter by Type*. See *Filtering by type* on page 101.

4.2.1 Filtering jobs

Ron selects a filter to narrow down the overview based on predefined criteria or criteria he has saved after an advanced search. The filter menu allows him to display only jobs in a certain processing status or, if he has previously saved his own filter for this purpose, only jobs that belong to a specific customer.

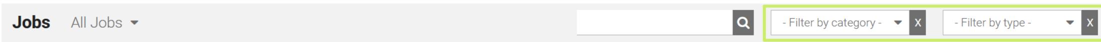
In the Jobs drop-down list at the top left, you can access various filters for restricting the job overview according to predefined criteria.



Three groups of filters are available in the menu for selection:

- *Standard Filter* : The search criteria of the Standard Filter, e.g. *Jobs I Participate In* or *My Finished Jobs*, are predefined automatically and cannot be edited. For more information, see *Standard filter* below.
- *Public Filter* : This allows you to save an advanced search and publish it to everyone. This gives other users the possibility to use the same filter as you. For more information, see *Public Filter* on the facing page.
- *My Filter* : This allows you to save your search results from an advanced search and store them as your own filter, so that you can access them quickly in the future and do not have to re-enter complex search queries. For more information, see *My filters* on page 98.

To the right of the search field are additional filters that can be used in combination with a filter view or the result of a simple search.



- If the system variable *Categories* is present and maintained on the data sheet, you can filter for jobs with specific categories. For more information, see *Filtering by category* on page 102
- To display only specific job/process types, the filter menu *Filter by type* is available on the far right. For more information, see *Filtering by type* on page 101

4.2.1.1 Standard filter

The search criteria of the standard filters are predefined by the system and cannot be edited.

1. Open the overview with > *Jobs* or by clicking on *Search* if you are already in the Job Manager module.
2. You can open the filter menu directly next to the title *Jobs* marked in bold by clicking on the triangular arrow ▾ after the current setting.

The menu is divided into individual sections. In the upper section, you will find the following Standard Filter under the heading of the same name:

- *Jobs delegated to me*: This filter lists jobs or processes that have been delegated to you by other users.
- *My other jobs* This filter lists jobs or processes for which you are a participant.

- *My Active jobs (ToDos)*: This filter lists jobs or processes for which you are the current assignee.
- *Jobs I Participate In*: This filter lists all active (not yet completed or canceled) jobs or processes for which:
    - You are entered as a participant.
    - You are or were the assignee of a workflow step.
    - You created the job/process yourself.
- *My Finished Jobs*: This filter lists jobs or processes that you have created and finished. To finish a job or process, click on the *Finish* button in the last step of the workflow.
- *My Canceled Jobs*: This filter lists jobs or processes that you have created and canceled.

  Note: Filters that start with *All* can only be seen by users whose role has the correct right in the Job Manager.
- *All Jobs*: This allows you to find all jobs or processes that are neither finished nor canceled. It also shows jobs or processes that you are not involved in.
- *All Finished Jobs*: This filter lists all jobs or processes in the database that have been finished.
- *All Canceled Jobs*: This filter lists all jobs or processes in the database that have been canceled.
- *Deleted Jobs*: This filter lists all jobs or processes in the database that have been deleted.
- *Picklist*: This filter lists all jobs that are assigned to you or to a group that you belong to. Simply select the job you would like to work on by clicking on the list entry, and the job will be assigned to you and removed from the *Picklist* filter.

If you select one of the standard filters, only jobs matching this filter will be displayed. If the number of results is high, the list of jobs will cover multiple pages. You can scroll back and forth using the arrows below the job overview.

4.2.1.2 Public Filter

Ron manages a large marketing team that is responsible for many campaigns at once. Because the use of home offices means that not everyone is on the company premises at all times, he wants to make sure that everyone knows what to do next. For this reason, he uses the *Public Filters* function. With the advanced search, he can create drop-down lists that show only open or incomplete jobs for each campaign. This way, with one call to the menu items under *Public Filters*, any employee can quickly see what remains to be done for any ongoing campaign and make arrangements accordingly.

Under the standard filters, the Filter menu section is followed by *Public filters*. The entries below this have been created either by you or other users in your organization.

All users can use these provided filters to list jobs that match the filter criteria. To publish a filter under *Public Filter*, you must activate the *Set as public filter* checkbox when saving an advanced search. You can find more information under *Saving and publishing a search as a filter* on the facing page.

4.2.1.3 My filters

Ron is a marketing manager and uses the *My Filter* feature to save complex advanced searches he creates for himself to reuse at any time. With a single click in the filter menu, he can find the relevant jobs. This works in a similar way to a bookmark in a browser. This way, he saves time and reduces the effort required for searching.

*Prerequisite**To use this function, your user role must have the rights to call up the advanced search and save the result as a filter.*

1. Open the overview with > *Jobs* or by clicking on *Search* if you are already in the Job Manager module.
2. You can open the filter menu directly next to the title *Jobs* marked in bold by clicking on the triangular arrow ▾ after the current setting.

The entries below the section *My Filter* are the result of an advanced search. Here you will find all advanced searches that you have saved as filters that are not public.

As the last entry at the end of the filter menu, you will find the menu item *Advanced Search*.

For the creation process, see *Advanced search* on page 105 and *Saving and publishing a search as a filter* on the facing page.

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

4.2.1.3.1 Saving and publishing a search as a filter

You have carried out an advanced search (search criteria: all jobs or processes that were created from *11/23/2022* and that are related to the item number *12345678*). You want to save the search request as a filter and use it again. The filter is to be called *Promotion 12345678*. You want to make this filter available to other users and publish it.

Prerequisite: You have carried out the search request and the search hits are listed in the job overview. Please also note *Advanced search on page 105**.*

1. In the area next to the drop-down list, click on the *Edit* button.

   The editing dialog box for the advanced search opens. The last entered criteria are displayed.

2. Click on *Search*.

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

3. Enter *Promotion 12345678* in the Filter Name input field.

4. Activate the checkbox at *Set as public filter*.

   Note: It is not possible to activate both checkboxes at the same time.

5. Click on *Save as filter*.

The filter *Promotion 12345678* is created in the drop-down list under *Public Filter*.

> Note
>
> You have the option of deleting a saved filter or editing it at a later stage as well as saving it under a new name. To do so, click on *Edit*.

4.2.1.3.2 Editing saved filters

> Note
>
> Only with the appropriate permissions in your role are you allowed to perform an advanced search and thus also edit existing filters.

1. Select a filter in the drop-down list under *My Filters* or *Public Filters* to edit the search.
2. Click on *Edit*.

   This opens the *Advanced Search* with the saved search criteria.
3. Customize the search query according to your criteria and then click on *Save* to overwrite your own filter or *Save as* for a customized search query under a new name. If you click on *Save As*, *Copy of* is written by default in front of the name of the customized filter to be saved.
4. Optional: Click on *Cancel* if you only wanted to see how the search query is structured and if it is correct.
5. Optional: A customized public filter can also be stored under *My Filters*. To do this, remove the checkmark in front of *Set as public filter*.

   Note: When editing a public filter, only the *Save as* button is available so as to prevent an accidental overwrite.
6. Optional: In the *Save the search as filter* dialog box, select the *Continue without saving* button if you decide otherwise and do not want to save after all. The modified search will still be executed once.

You have adjusted and saved the search stored in a filter.

4.2.1.3.3 Deleting a filter

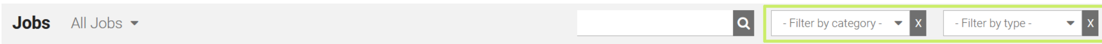
1. Select the filter in the drop-down list to run the search.
2. Click on *Edit*.
3. In the lower left-hand corner, click on *Clear*.

The saved filter has been deleted. When you delete a public filter, it is also deleted for all other users.

4.2.1.4 Filtering by type

Ron needs a list of all jobs based on the type *Online Campaign*. To view only specific job/process types, he uses the menu *Filter by Type*.

The types (and categories, if available) are displayed as a drop-down list to the right of the simple search in the overview. If you select a type in this drop-down list, you will only see jobs or processes that match the currently selected filter and are based on that job/process type.



To empty the set filter under *Filter by Type* and reset the field to its initial state, click on the white X next to the drop-down list.

Note

It is possible that this filter option is not enabled in your system. If you have any questions, please contact your administrator.

EXAMPLE

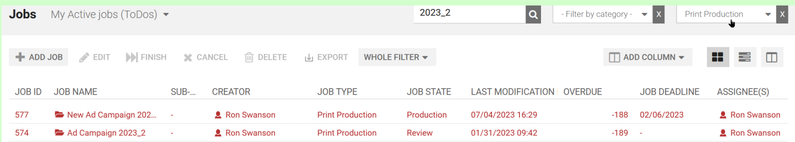
You want to edit a job for a print campaign and cannot find it immediately in the overview because there are a large number of new entries that differ only slightly in the job name. Since it is not an online campaign, you want to narrow down the search further using the filter menu *Filter by Type*.

You are in the job overview with the *Involved Jobs* filter.

1. On the far right of the filter and search bar, click on the field *Filter by Type*.

   A drop-down list with all job types used opens.

2. Select *Print Production*.



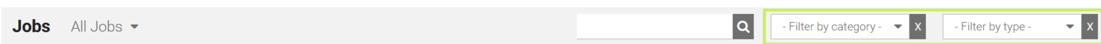
With this filter, the overview now only shows jobs based on this job type.

To cancel the set filter under *Filter by Type* and reset the field to its initial state, click on the white X next to the drop-down list.

4.2.1.5 Filtering by category

To organize his work, Ron has assigned different categories to his jobs and processes on the data sheet. *Filter by Category* allows him to filter in an existing filter view or based on the result of a search for jobs and processes to which the selected category is assigned.

Before using categories to find jobs or processes in an existing filter view, a number of precautions must be taken. To filter by category, the system variable *Categories* must be placed on the job data sheet and populated for at least one existing job or process. The categories are displayed as a drop-down list to the right of the simple search in the overview.

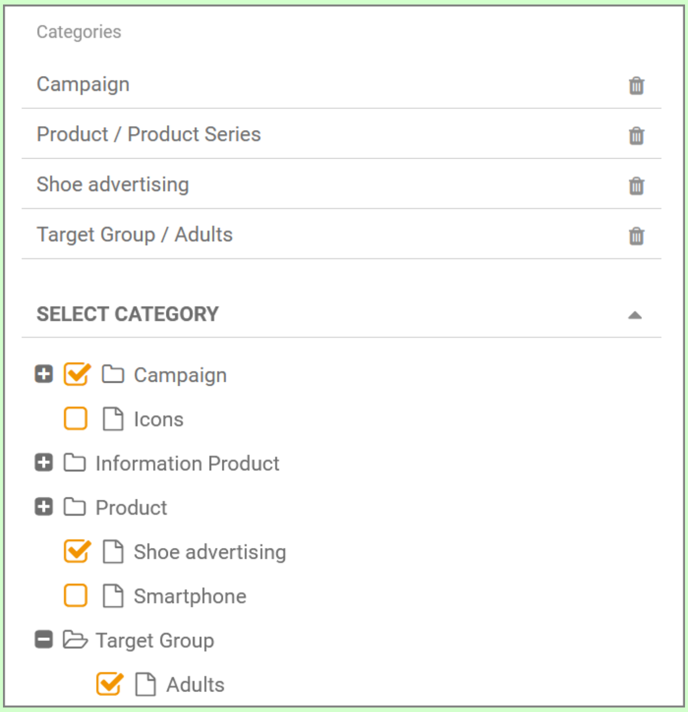


Note

It is possible that this filter option is not enabled in your system. If you have any questions, please contact your administrator.

EXAMPLE

You have assigned your jobs to categories in the data sheet and want to use these when searching.



You are in the job overview with the filter *Involved Jobs* and have already performed a quick search using the keyword *Sale*.

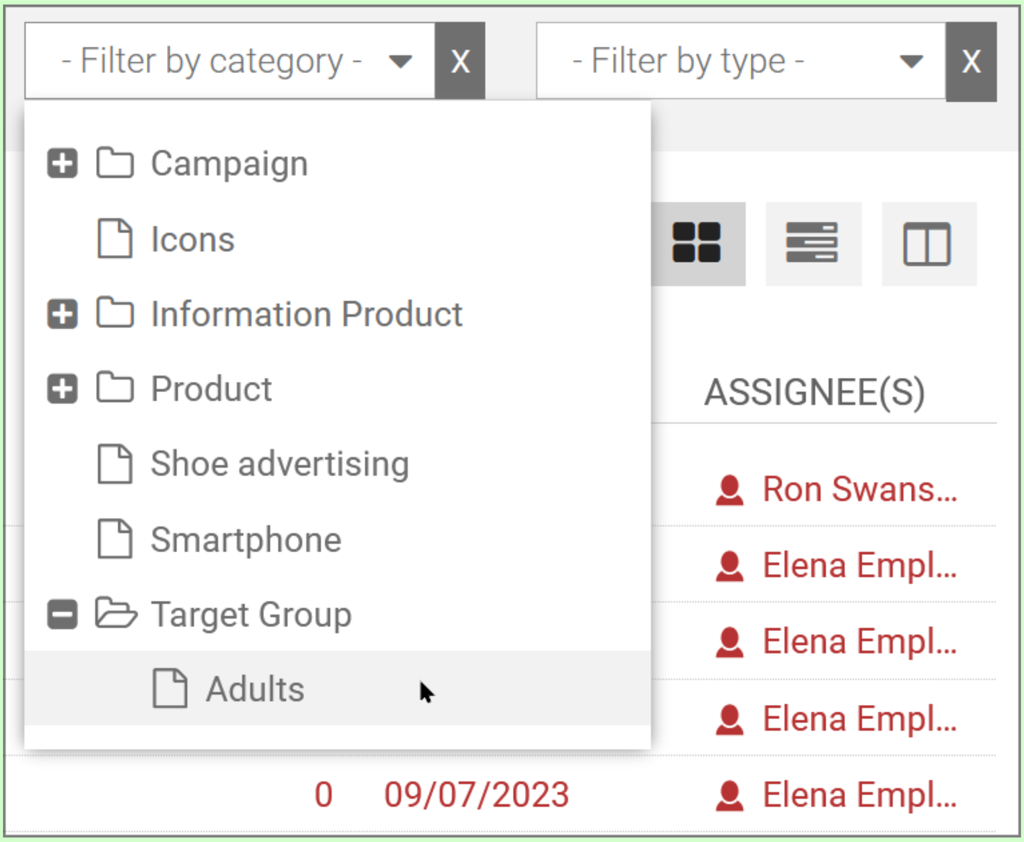
1. Click on the *Filter by Category* field.

   A drop-down list with all assigned categories opens.

2. Select the entry *Smartphone*.

   When you click on a category, only jobs or processes that match the current selected filter and that are assigned with this category are displayed.

With the category filter set, the table now only lists sales campaigns from the *Smartphone* category.



To cancel the set filter under *Filter by Category* and reset the field to its initial state, click on the white X next to the drop-down list.

4.2.2 Advanced search

Ron uses the advanced search to define complex search requests based on a combination of multiple search criteria, which he can save and reuse as a filter. He can use the filter for himself only or make it available under *Public Filters*, thereby making it accessible to other users.

Criteria

In the advanced search, you can restrict the jobs or processes displayed using the criteria below.

Criteria	Description
Job Type	This option allows you to narrow the search to a specific type.

Criteria	Description
Field name	Select the variable field on the data sheet in which you want to search. Note: The selection depends on the job type that is selected.
Restriction	Specify which condition must be fulfilled when searching according to the search criterion. You can specify whether the search term should match the content of the selected field, the search term should simply be included in the field, or whether the search term should be excluded from the field. The criteria for date fields can be defined precisely.
Search Criterion	Select the search term that you want to use to search the selected field using the specified restrictions.
+ −	You can add additional search criteria (plus sign) or remove search criteria that have already been created (minus sign). You can link multiple search criteria using an AND or OR operation.

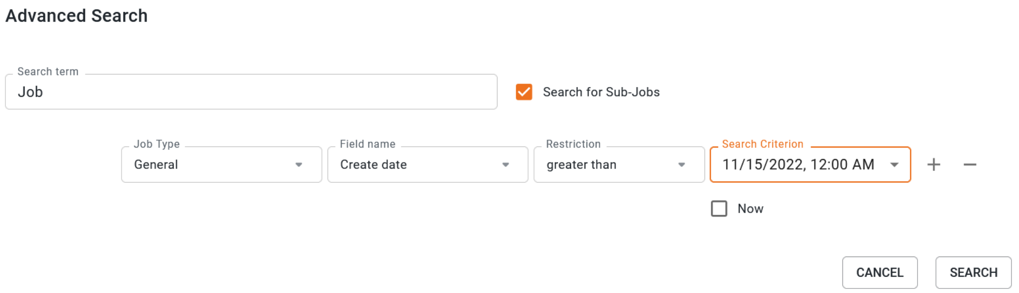
Executing an advanced search

You want to find all orders or processes created since 11/15/2022 that relate to item number *2022_132367*. To perform such a query, you must used the advanced search.

1. Navigate to the overview page of the module Job Manager > *Jobs*.
2. In the job filter drop-down list at the top left, select the last menu item, *Advanced Search*.

   The overview displays all the jobs or processes that are currently being processed. The *Edit* button now appears next to the drop-down list.
3. Click on *Edit*.

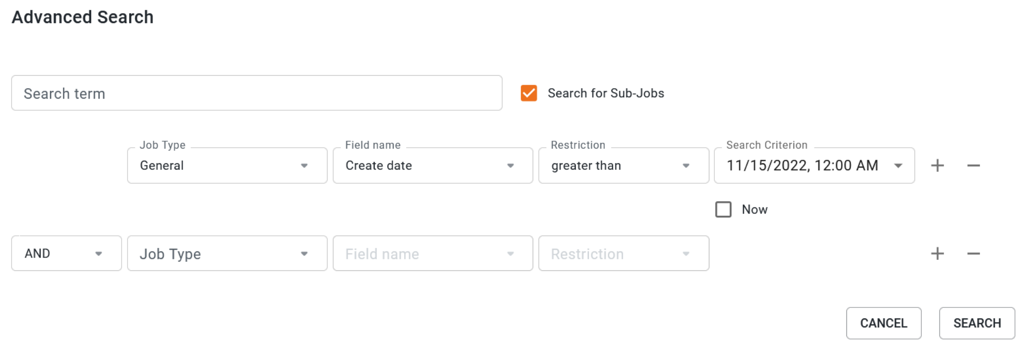
   The editing dialog box *Advanced Search* opens.



4. From the drop-down list *General*, select the entry *Job Type*.
5. From the drop-down list *Field name*, select the entry *Create date*.

6. From the drop-down list *Restriction*, select the entry *greater than*.
7. Click in the *Search Criterion* field to expand the date picker. Use the date picker to set the date *15.11.2022* and *00:00* as the time in the *Search Criterion* field.
8. Click on the plus sign.

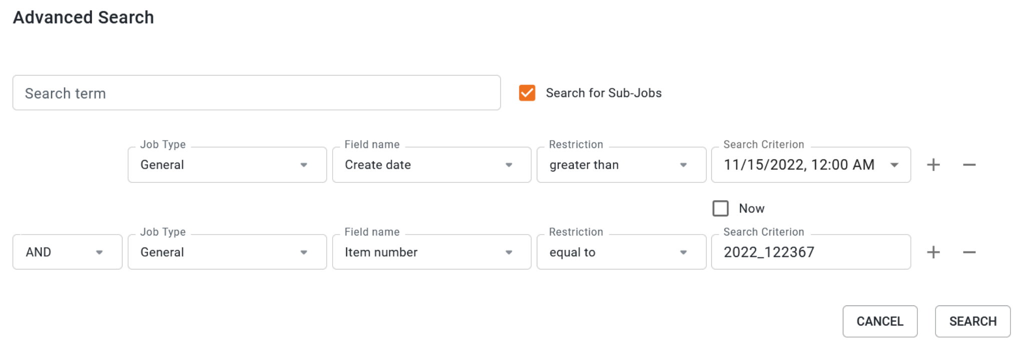
   This adds a new line to your search request for another restrictive search criterion.



9. Select the entry *AND* from the drop-down list.
10. From the drop-down list *Job Type*, select the entry *General*.

    The *Search Criterion* field is displayed after the selection.
11. From the drop-down list *Field name*, select the entry *Item number*.
12. From the drop-down list *Restriction*, select the entry *matches*.
13. Enter the item number *2022_132367* in the input field *Search Criterion*.

    The dialog box is displayed as follows:



14. Click on *Search*.

    The dialog box *Save the search as filter* opens.
15. Click on *Continue without saving*.

    The search is carried out and the search hits are listed.

16. To adjust the previously defined search criteria, click on the *Edit* button again.

You have performed an advanced search combining two search criteria.

> **Note**
>
> In the advanced search, you can also query the field names *Creator* and *Assignee* using the *Current User* search criterion to be checked. This option makes it easier to create filters to search only for objects for the currently logged-in current user (with the restriction: *matches*) or vice versa to exclude them from the search.

4.2.3 Simple search

Ron uses the simple search as a quick way to search for a specific term or combination of terms in the current filter view. The simple search is quickly accessible and is a handy function when users have a rough idea of what they are looking for. For example, a search can be made for *Newsletter* in order to find jobs and processes related to creating or sending newsletters.

You will find the search field above the job overview. You can recognize it by the magnifying glass. You can use the simple search to further restrict an existing filter view. If you set the filter on the top left of the job overview to *My Active jobs (ToDos)*, you will not find completed jobs or ongoing jobs that have other assignees. To search all jobs, the standard filter *All Jobs* must be selected beforehand. The entered keyword is searched for in the *Job Name*, *Creator*, *Assignee*, *Job ID* and *Description* fields. Other criteria are not possible.

Your situation	Input	Description	Examples: Search result
You have one or more keywords, but you don't know if all keywords are included.	*Summer Campaign Review*	Multiple keywords are OR-linked in the search. You will get search results if at least one of the entered keywords is found.	• Summer Tradeshow • Winter Campaign • Review Summer Campaign • Review Adverts for Christmas • Campaign Review
You have an exact sequence of keywords.	*"Campaign Summer"*	In a search phrase, all the keywords entered must be found in the exact sequence specified.	• Campaign Summer • Campaign Summer 2023 • Shoes Campaign Summer
You know only a part of a name or a specific keyword to be found.	*Camp**	You can use a wildcard * to search for substrings. Note: The wildcard search only returns substrings to the right of *. A construct like *campaign is therefore not possible.	• Campaign Summer • Campaign 2023 • Camping Advert

Note that the search does not begin until you enter four characters. Entering fewer characters will not yield a search result without an error message.

4.3 Opening a job

To edit the fields in a job data sheet, you must open the job. There are several ways to do this.

Via an e-mail link

The easiest way is to click on the link in the notification e-mail you received when you were assigned the job or sub-job. This will take you directly to the job without a search query or filter. If you no longer have the e-mail or want to open the job later, look under the bell icon next to your initials for the notification and click on the link in it to open it.

In the dashboard

You can also use the dashboard as a starting point for your activities in the Job Manager module. In the dashboard, at a prominent location at the top of the *My Active jobs (ToDos)* heading, you will find a list of all the jobs that are currently assigned to you. Click on the job you want to process next and you will be taken to the job page with the data sheet. See *Dashboard* on page 25.

In the job overview

To filter and sort the list in the job overview, you can use the filter and search functions. You can filter by type, category, or other criteria and sort by individual columns. This way you can find and prioritize the jobs that are important to you.

To open a job or sub-job, double-click on its name. Alternatively, select it in the job overview and then click on *Edit* in the action bar. After you open the job or sub-job, you will see the job page with the data sheet.

Opening a sub-job in the data sheet

In the data sheet of a parent job that is already open, switch to the *Sub Jobs* tab. Here you will find all sub-jobs that belong to this job. To open a sub-job, double-click on its name. The sub-job will open in a new window, where you can edit or execute it. To open the parent job or sub-job from an open sub-job, click on the job name above the sub-job name in the title of the data sheet at the top.

Associated tasks

- *Editing a data sheet* on the facing page
- *Sub-jobs or processes* on page 54

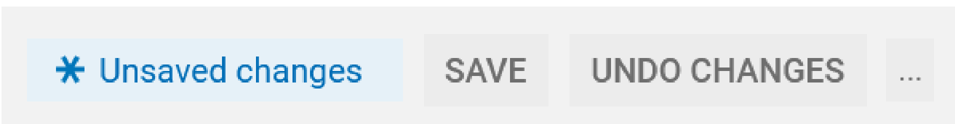
4.4 Editing a data sheet

The data sheet is the heart of a job. The data sheet is where the job is edited. For an introduction, see *Data sheet* on page 35

Elena is an experienced agency employee who has worked on many jobs. She knows that she always has to read the instructions left for her by the previous assignee first. She can find them in the e-mail that she automatically received when the job was forwarded or in the associated system notification. There it says what she has to do in the current workflow step on the data sheet and what special considerations there are. An important source of information is the description text in the *Briefing* tab on the data sheet, which was entered by Ron upon creation of the job. A third possible point of orientation is the name of the workflow step and the current progress of the job. If this is *Review*, for example, she knows that she needs to review the assets in the data sheet, while if it is the much later step *Publishing*, she knows that her job is to publish an approved asset to the output channels defined for the campaign.

To edit the data sheet, Elena must open the job in the job overview or dashboard. See *Opening a job* on the previous page. The appearance of the data sheet may vary depending on the job type, as Elena's organization has created different templates for different campaigns and projects. The data sheet contains all the important information and field variables for that job. She can then modify or add to the data sheet fields that have been approved for editing, such as the job's start and end dates, the assets to be used for the campaign, or the texts to write or review. See *Asset Selector* on page 120. She can also fill in tables with numbers or other values. When she is finished, she must save the data sheet and forward it to the next assignee. When doing this, she can also store descriptive texts or work instructions for the subsequent assignee. See *Forward or return?* on page 157

As soon as she makes changes to the data sheet, Elena is notified of the following directly above the data sheet:



Before she can forward the job, she must save her changes. If she decides otherwise, Elena can undo the changes with the same button.

Associated tasks

- *Opening a job* on page 110
- *Asset Selector* on page 120
- *Tables* on page 128
- *Customizing the table view* on page 31
- *Example of use for the variable Template* on page 131
- *Example of use for the variable Document Selector* on page 132
- *Forwarding a job* on page 80

4.4.1 Visibility of tabs and variables

Elena is currently processing the workflow step assigned to her for a campaign. In a second campaign, she is invited as a participant in the same workflow step to comment on the work results and progress. Elena notices that, in the job that she is only invited to as a participant, she cannot see all the tabs and variables in the data sheet. She wonders why this is and whether she has done something wrong. She contacts her system administrator and asks for an explanation.

The system administrator informs her that this is the desired configuration. He explains to Elena that he can customize the visibility of the tabs and variables for each campaign. This allows a company to specify the roles for which certain tabs and variables are visible on the data sheet. The purpose of this is to prevent sensitive or irrelevant information from being visible to all users or overwhelming participants with too many options.

4.4.2 Overview of data sheet variables

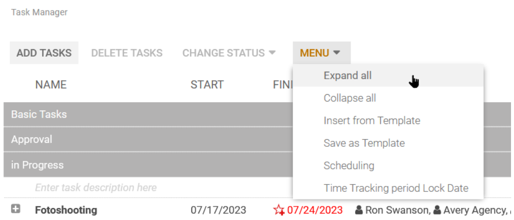
To ensure that all of the necessary information (for campaign planning, for example) can be entered, Ron and his team have numerous variables (field functions) available for the data sheet layout. The following is a tabular list of variables used that are specific to the *Job Manager* module and that you will encounter in your daily work with job data sheets.

Variable types

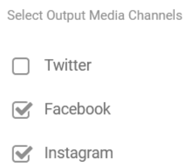
The following table shows an overview of the variable types used that you may encounter on a data sheet. To provide a better overview, they are sorted alphabetically and explained here briefly.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Action</td><td>This variable represents a button on the data sheet. Clicking on it opens the stored URL.</td></tr>
<tr><td>Asset Selector</td><td>You can use this to add assets from the Media Pool or locally saved image files (see Asset Selector on page 120).

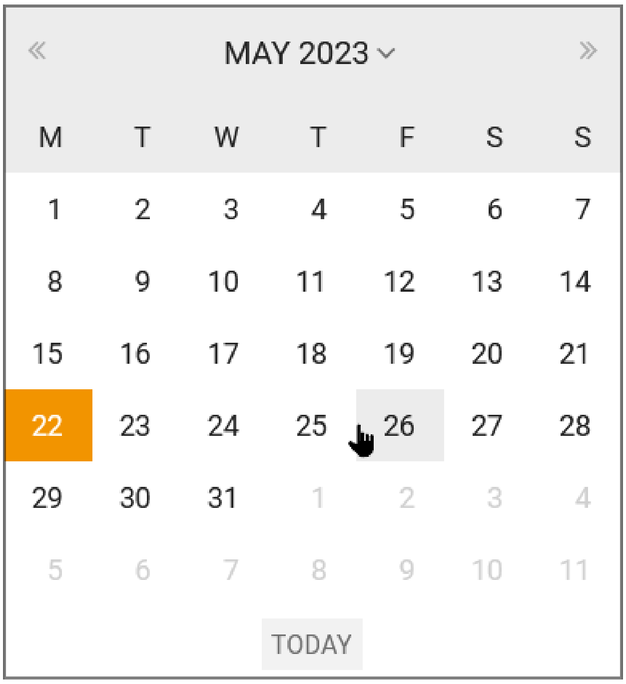
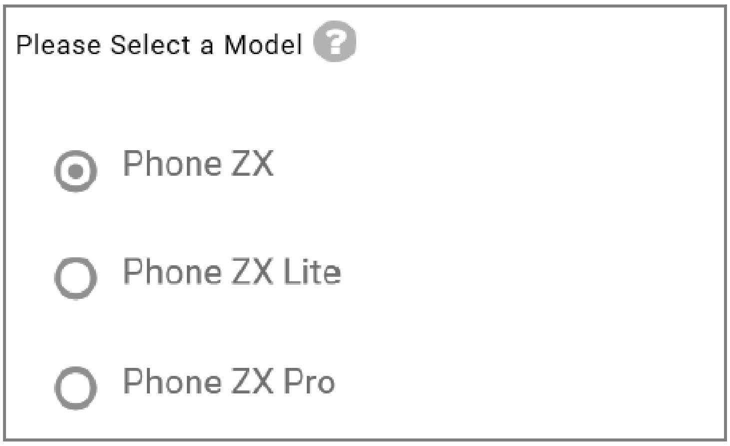
</td></tr>
<tr><td>Task Manager</td><td>In this area, you can view and edit the tasks assigned to individual workflow steps and post expenses. For all the details, see the chapter Task Manager on page 71.

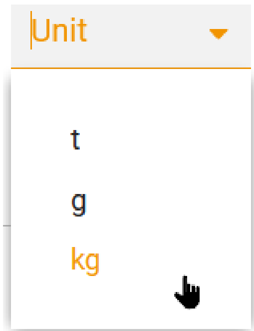
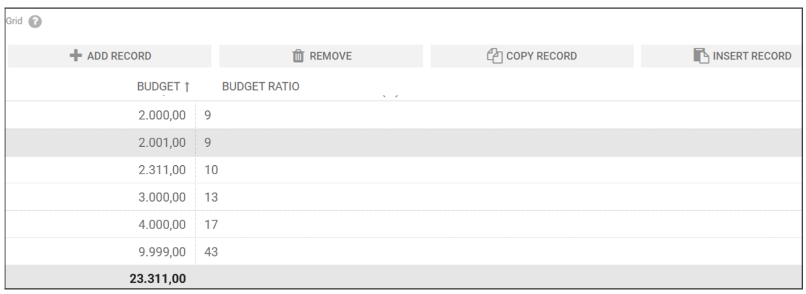


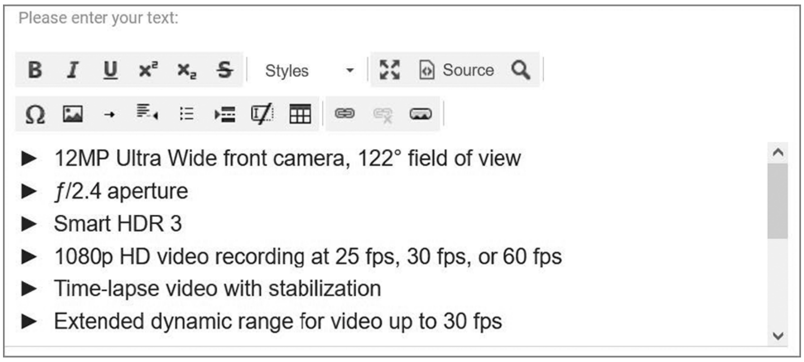
</td></tr>
<tr><td>Selection field (single or multi-select)</td><td>Here you will find a selection of predefined entries. Both drop-down lists and radio buttons are possible. Selection fields can be linked to custom objects so that, for example, centrally defined boilerplate texts can be selected.

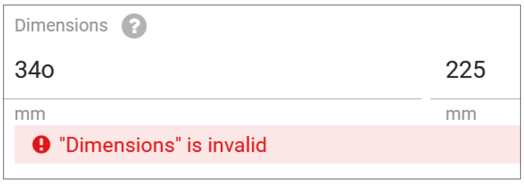
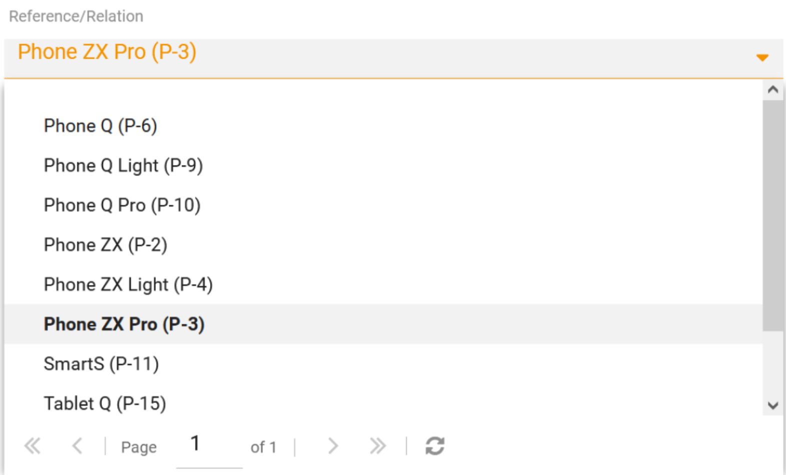


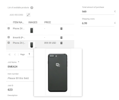
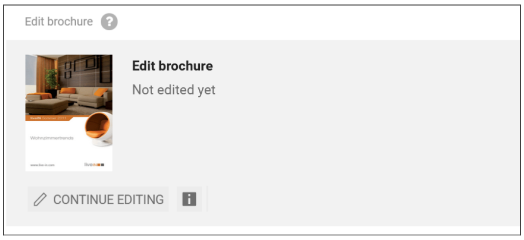
</td></tr>
<tr><td>User</td><td>This function is responsible for searching and selecting users on the data sheet.</td></tr>
</table>

Function	Description
Date selection field and date picker	Here, you can enter a date in the format *DD.MM.YYYY*or select one using a date picker. Another option is to use a date picker with an additional time selection. 
Document Selector	The *Add Document* button opens the search in the *Brand Template Builder* module and allows you to add a document to the data sheet. See *Example of use for the variable Document Selector* on page 132
Single-select	This allows you to select a single stored value. 

Function	Description
Combo box	A combo box contains a list of elements from which you can choose. It consists of a text field at the top and a drop-down list. Users can either select a stored value from the drop-down list or enter their own value in the text field. 
Multi-select	This type of field allows you to make a selection from multiple stored values. 
Table	To enter and display required information in a tabular view, two different table types can be set up on the data sheet. For more information, see the section *Tables* on page 128. 

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Text fields (single or multi-line)</td><td>These are fields in which you can enter a text that can consists of one or more lines. The maximum number of characters allowed may be limited.


Rules can be stored in advance to ensure that only valid entries are made.

</td></tr>
<tr><td>Reference/Relation</td><td>In extended tables: A Reference/Relation field allows information from other data sheets to be used, e.g. to display product information from the Marketing Data Hub module. As a field on the data sheet: If you select a job from a drop-down list in a field of this type in a workflow step, for example, later assignees can click on a link in the data sheet to open that job or select a job again.

</td></tr>
</table>

Function	Description
Reference/Property	In extended tables: This allows variables from another data sheet (such as Asset Selector) to be displayed in their own table column. In the figure, the reference to the image asset has been added to the product name. 
Template	Here you can create and edit a document directly from the data sheet in the *Brand Template Builder* module. See *Example of use for the variable Template* on page 131. 

4.4.3 Adding assets

Single or multiple local files or assets already in the system can be selected and added to the job data sheet as an asset.

PrerequisiteIf the Image variable is present in the form of the Add Asset button on the data sheet, authorized users can use it to add locally stored files or existing assets from the Media Pool to the data sheet.

Note

Multiple use of the same asset in the Image of the open job data sheet is not possible.

You have three options for adding one or more assets to the job data sheet:

- *Uploading a file from the computer* on page 121

  If you want to attach one or more files to the data sheet that are stored locally on your computer or on a server, use the function *Upload new assets*.

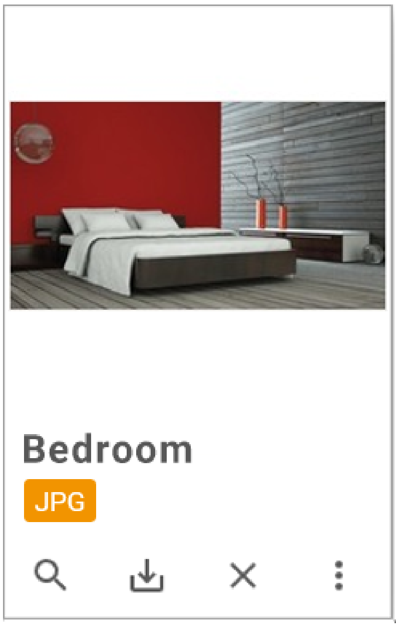
- *Adding from own collection* on page 124

  The assets are already in the system and have been preselected by you after the upload and stored in a collection. You use the command to add an asset from your Media Pool collection *Own DSE images* to the data sheet.

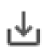
- *Selecting an existing asset* on page 123

  For the purpose of creating a new image flyer, you want to find an asset in the Media Pool, select it, and place it on the data sheet. The Image is located on its own tab.

Functions on the added asset



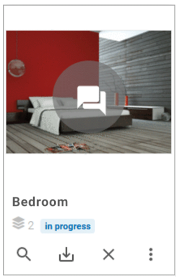
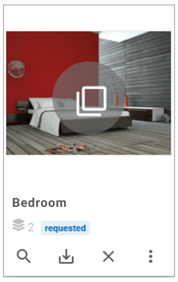
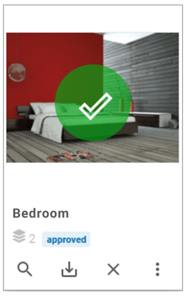
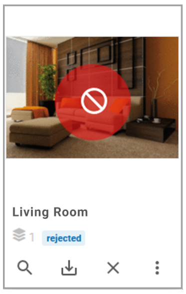
Once you have added an asset, it will be displayed as a tile on the data sheet with the corresponding information and a function bar. The original file name is displayed as the title without the suffix. The file format is indicated below this. The buttons in the bottom line of the tile provide the following functions:

Function	Description
	This opens the detailed view of the asset with metadata and a large preview.
	This downloads the asset.

Function	Description
×	This removes the asset from the data sheet.
⋮	This opens the ⋮ menu with the functions listed below.
Open	This opens the detailed view of the asset.
Start Review	Note: Available only if the *Review Manager* module is activated and you have the appropriate permission. In the case of a review in progress, the details are displayed on both the asset tile and on the *Details* tab on the right-hand side of the data sheet. The comments area of a data sheet shows whether a user edited a review that was started in the job or process. Additionally, you can see the status of the review after clicking on the tile. Refer to the section below for information about the progress indicators for a review.
Open Review	Note: Available only if there is an ongoing review for the asset and you have the appropriate permission.
Decide	Note: Available only if you have the appropriate permission to agree on assets. Here you can immediately decide whether you want to approve or reject the asset on the data sheet without starting a review.
Large Preview	A large preview image of the asset is displayed.
Remove	The asset is removed from the data sheet.
Send As Email	This sends the asset by e-mail.
Download	This downloads the asset and saves it locally.

Status indicators of a review in the data sheet

If the asset is under review, an overlay indicates this along with the current review status by means of four different icons.

Function	Description
	The review has been started and is underway. Version 2 is currently in progress.
	The review is currently paused and a new version has been requested.
	The review process is complete and the asset is thereby approved.
	The review is permanently finished and the asset was rejected.

For more information on the review process, please refer to the Review Manager User Help.

4.4.3.1 Asset Selector

Ron is responsible for coordinating many jobs or processes related to the creation of advertising materials. To make his job easier, he uses the Asset Selector when setting up job data sheets.

Files that are needed for a project can be managed in the form of assets. Assets can have different formats, such as images, documents, audio files, or videos. Ron and other people involved can add all relevant files belonging to a project to a job or process as assets for sharing, editing, or review. This simplifies communication, collaboration, and quality assurance between those involved in a project.

CASE EXAMPLE

Ron has organized a photo shoot for a new campaign. He uploads a selection of images that he has coordinated with the photo editor. These images are assets that belong to the job.

Ron's next workflow step is to hire a graphic designer from the creative team to design the brochure for the campaign. The graphic designer uses the image assets from the job for the layout of the brochure. He adds his design to the job as a PDF using the Asset Selector on the data sheet.

Ron starts a review and invited review participants are informed about it by the system and can view the PDF, comment on it, and also reject or approve it using the Reviewer role.

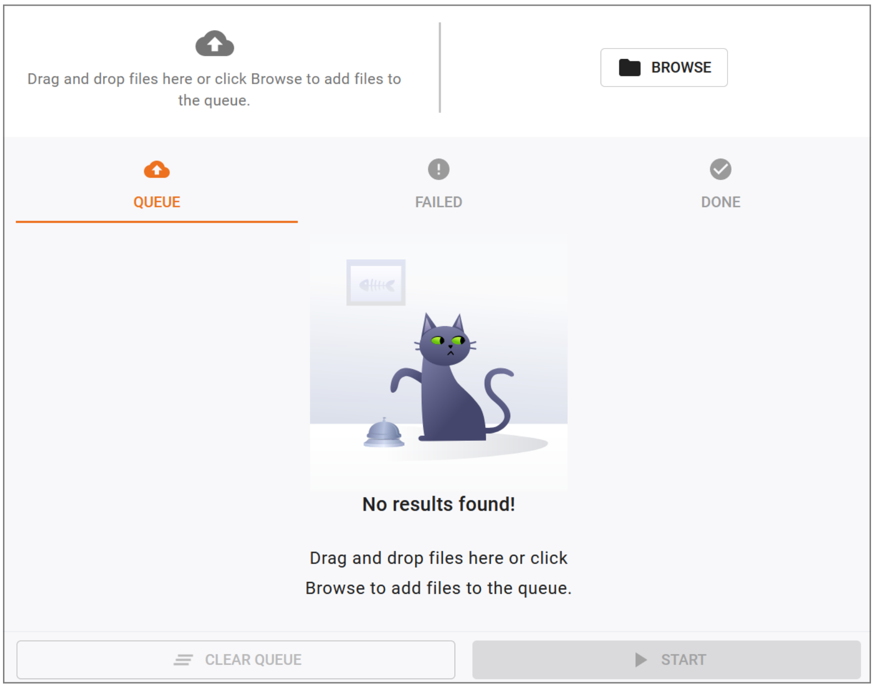
Associated tasks

- *Adding assets* on page 117
- *Downloading assets* on page 126
- *How to send assets by e-mail* on page 124

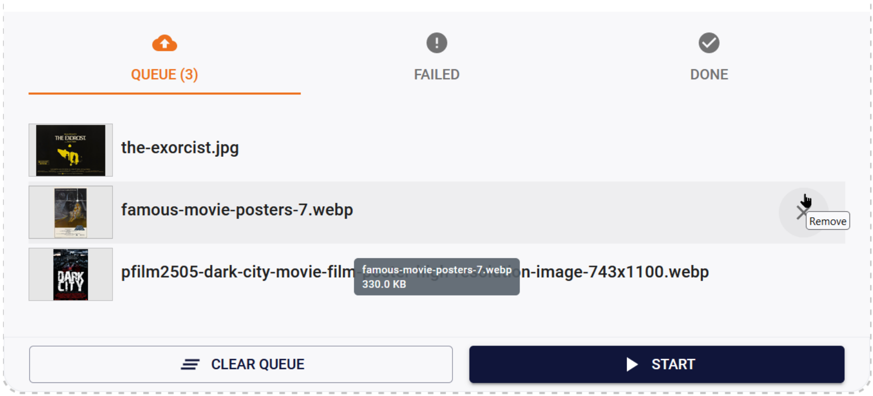
4.4.3.2 Uploading a file from the computer

1. Open the job data sheet and switch to the tab with the Image.
2. Click on the *Add Asset* button on the data sheet or, to the side of that, select ▾ menu > *Upload new assets*.

   The file upload window opens.
3. Add your desired files to the upload window by drag-and-drop. Alternatively, click on *Browse* and select individual files or a folder.



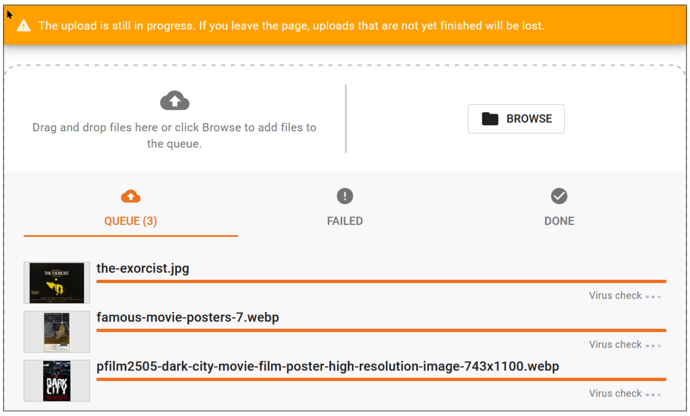
4. Optional: To remove individual accidentally placed files from the queue, move the mouse pointer over the item and click on ╳ .



   To remove all files from the queue, the *Clear queue* button is available.

   For PNG, JPEG, BMP or GIF files, a preview image is already displayed immediately after adding. For multi-page documents, preview generation takes more time and is only visible on the data sheet after a little delay.

5. Click on *Start*.
6. The files are uploaded and subjected to a check.



Note

The separate upload window must not be closed before the process is complete. While uploading large files or a large number of files, you can continue working in the system without interruption.

If an upload fails, you will get more information in a tooltip by moving the mouse pointer over the corresponding file in the list. Often the file is already in the Media Pool as an identical duplicate, which is why the upload is aborted.

Assets are displayed as tiles on the data sheet once the file upload is complete.

4.4.3.3 Selecting an existing asset

1. Open the job data sheet and switch to the tab with the Image.
2. At the *Add Asset* button on the data sheet, click on ▼ menu *Select asset*.

   This opens the asset search in the Media Pool.

3. Search for an existing asset in the Media Pool: Enter your search terms and press ⏎.
   For information about searching in the Media Pool, please see the Media Pool User Help 7.4.

4. In the search results, activate the checkbox for the asset that you want to select in the bottom right corner of the asset tile by clicking on the circled plus sign.

   The checkbox will be highlighted in the selection color if you have activated the asset.

   Note: You can select multiple assets at once and place them on the data sheet.

5. Click on *Apply*.

   The search window closes and the selection made is placed on the data sheet. The assets appear as tiles on the data sheet.

6. In the upper area of the data sheet, click on *Save* to save your changes to the data sheet.

   The data sheet remains open for further processing.

7. In the upper area of the data sheet, click on the close field ×.

You have placed the selected asset(s) on the data sheet. The data sheet displays the assets as tiles.

4.4.3.4 Adding from own collection

1. Open the job data sheet and switch to the tab with the Image.
2. At the *Add Asset* button on the data sheet, click on ▾ menu *Add from Own collection*.

   The *Manage own assets* dialog box opens.

3. Check the checkmark at the bottom right of the selected assets to be included in the job data sheet.
4. Click on *Use Selected Assets*.

The dialog box closes and you return to the job data sheet. You have added assets from your own collection. The data sheet displays the assets as tiles.

4.4.3.5 How to send assets by e-mail

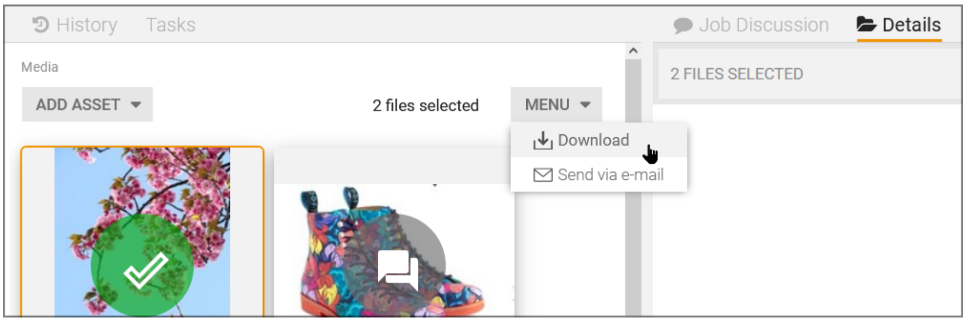
For a job/process to which multiple assets have been added via the Asset Selector (e.g. for review), you can flag a selection. You can send multiple assets at once as a ZIP archive or as a link.

If there is more than one asset on the data sheet, you can make multiple selections by holding down the SHIFT key and clicking on the beginning and end of the desired selection. You can also hold down the CTRL or CMD key and select specific individual assets.

A *MENU* ▾ button is displayed for the selection made:

There you can access the menu commands *Download* or *Send via e-mail*.

1. In the asset overview on the data sheet, select the assets you want.
    a. While holding down the SHIFT key, click on the first and last asset preview for a range selection.
    b. Optional: While holding down the CTRL / CMD key, click successively on all single assets you want to select.
2. A *MENU* button appears above the asset heading.



3. Click on the triangle arrow ▾ to open the menu and select the entry *Send via e-mail*.

    The *Send by e-mail* dialog box opens. If you want to send the PDFs, everything is preset and you do not need to change anything in the selection. Other options to choose from are *Presentation*, *Print*, *Web*, and *Original*.
4. Select an option or leave everything as default.
5. Enter the address(es) for one or more e-mail recipients in the search field or select the recipient(s) by scrolling down the drop-down list and using the arrows to scroll through the entries.
6. Adjust the text of the e-mail message.
7. Select a send option:
    - *As link*
    - *As attachment*
8. Click on the *Send via e-mail* button.

    Multiple assets are sent as a ZIP archive to the default download folder of your web browser. A message appears indicating that the e-mail was sent successfully.
9. Click on *Close*.

You have sent one or more assets from the job via e-mail.

Refer also to *Downloading assets* on the next page.

4.4.3.6 Downloading assets

For a job/process to which multiple assets have been added via the Asset Selector (e.g. for review), you can flag a selection. It is possible to download multiple assets at once in the form of a ZIP archive.

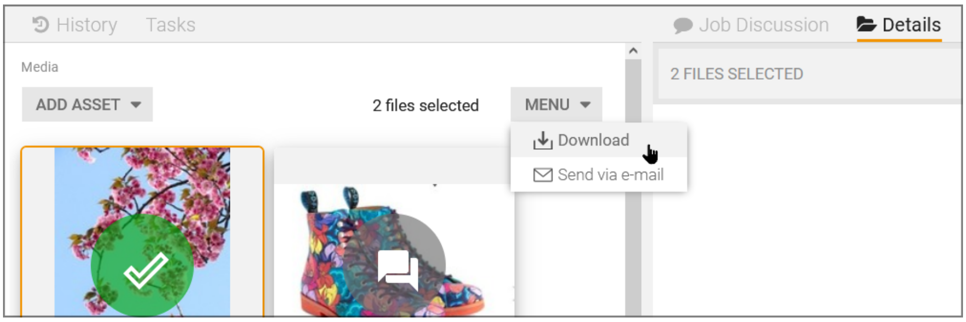
If there is more than one asset on the data sheet, you can make multiple selections by holding down the SHIFT key and clicking on the beginning and end of the desired selection. You can also hold down the CTRL or CMD key and select specific individual assets.

A *MENU* ▾ button is displayed for the selection made:

There you can access the menu commands *Download* or *Send via e-mail*.

1. In the asset overview on the data sheet, select the elements you want.
   a. While holding down the SHIFT key, click on the first and last elements for a range selection.
   b. Optional: While holding down the CTRL / CMD key, click successively on all single elements you want to select.

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

2. Select *MENU* > *Download*.

   A download dialog box opens. If you want to download the originals, everything is preset and you do not need to change anything in the selection.
3. Click on the *Download* button.

   The download will go to the default download folder of your web browser.
4. Close the window with the download dialog box.

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

Refer also to *How to send assets by e-mail* on page 124.

4.4.4 Tables

Elena needs to collect data regularly in the workflow steps assigned to her. She noticed that sometimes the table doesn't look like a classic Excel data sheet, but it does with other data sheet layouts.

Depending on the data to be collected and displayed, the users of the Job Manager module can work with two types of tables. The available tables allow an efficient and clearly organized entry of data.

Tables are needed to capture and display a wealth of interrelated data in a structured, clear way. Both advanced grid and comfort grid tables can be used on the job data sheet. In the following section, you will find out how the two differ.

Advanced grid

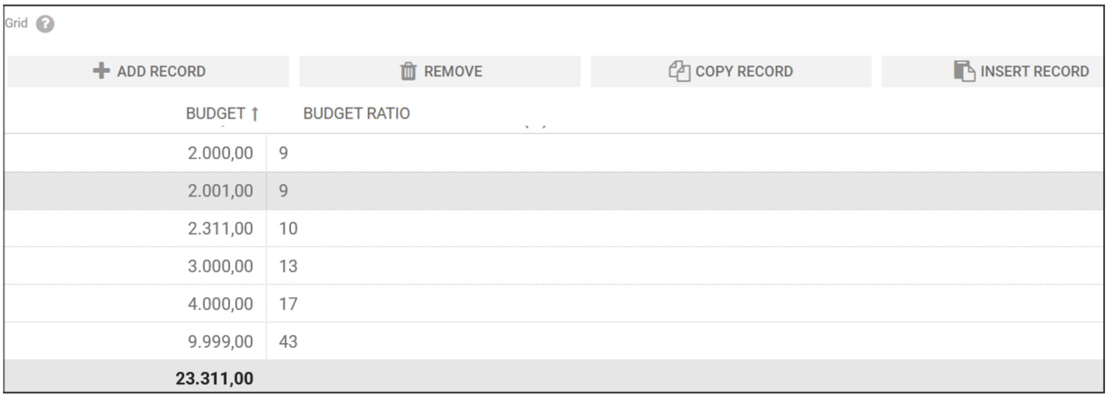
This type of table allows for a highly differentiated collection of data and data types. These include text, assets, dates, relations, and multi-select. You can also display extensive tables of this type with pagination.

Unlike Excel, the initial table does not display an empty workbook. You can recognize the extended table by clicking on *Add Entry*: In an extended table, the fields to be edited open one after the other. Only after you have saved your entries will the data be displayed in a table.

If an advanced grid is added to the data sheet of a sub-job, it can be configured to be pre-filled by a table from the parent job. In the sub-job, you can edit the pre-filled table and delete and add records. If this child table differs from the parent table, you will see a refresh button. If you click on the refresh button, the table is overwritten again with the current values from the parent table; your unsaved changes are permanently lost.

Comfort grid

A comfort grid allows you to enter fewer types of data than the extended table: text, number, date, and single-selects. This type of table still remains visible while entering or editing an entry. Date and number values can be displayed and entered according to the selected interface language. Predefined formulas can be processed by filling in the fields, with the calculated result displayed in a result column or in the footer.


Grid

ADD RECORD | REMOVE | COPY RECORD | INSERT RECORD

BUDGET ↑	BUDGET RATIO
2.000,00	9
2.001,00	9
2.311,00	10
3.000,00	13
4.000,00	17
9.999,00	43
23.311,00	

There are numerous keyboard shortcuts to aid in the editing process:

- Use the *Add Record* button above the table to add as many lines as you want. Selected lines can also be removed by clicking on the *Remove* button with the trash icon.
  Note: The lines are removed immediately with no confirmation dialog box.
- You can activate edit mode by double-clicking on a cell.
- If a cell is in edit mode, you can use the ↹ (Tab) key to move to the next cell – then also in edit mode. Press the ↹ key in the last cell of the table to add a new line.
- Numeric fields: The value is increased by pressing the ↑-/↓ keys. In addition, numbers can also be entered via the numeric field.
- Date fields: Press the ↓ key in edit mode to open a date picker. Use the ↑-/↓ and →-/← keys to select a date. Press the ↵ key to adopt the date.

A date can also be entered via the text field.

- Use the *Copy record* button or the keyboard shortcut CTRL+C / CMD+C to copy the contents of the selected line.
- Use the *Insert record* button or the keyboard shortcut CTRL+V / CMD+V to paste the previously copied content back into the line below the selected data record.
- Hold down the SHIFT key and click on the first and last line to select a range of data records that you can then remove or copy using the corresponding buttons. By holding down the CTRL or CMD key, you can selectively click on several individual records and select them for further editing.
- Clicking on a column header will sort the contents of that column. Click again to sort in reverse order.

You can use the button to activate the view of the table in full-screen mode. In this mode, you will only see the table on the data sheet and will rarely have to scroll through the data. If the content of a cell cannot be displayed completely, move the cursor to the cell. All the content is then displayed in a tooltip. This also applies to cells in the header.

4.4.5 Example of use for the variable *Template*

You can skip this section if you do not use the module *Brand Template Builder* (BTB for short) in your organization.

For the planned production of a new image flyer, you are editing a job that has the *Template* variable. This variable was used to automatically assign a template from the *Brand Template Builder* module to the job or process. The variable is on the *Flyer* tab on the data sheet created for this purpose. You wish to create a new document from this template.

Prerequisite The Template variable was stored on the data sheet of the type used and you are the creator of the job or authorized to edit the variable.

1. Open the data sheet and go to the *Flyer* tab.
2. Click on *Edit document*.

   This creates a new BTB document. The document opens in a new dialog box in the document wizard.
3. Edit the document.

   Note: The content and functions enabled for editing are defined in the template.
4. To finish editing, click on *Close Document*.

   After creating and editing the document, a new icon appears above the preview screen. Click on it to open the detailed view of the element.
5. To continue editing a document that is not yet complete, click again on *Edit document*.

   Note: You can download the completed BTB document or also send it Send by E-Mail.

4.4.6 Example of use for the variable *Document Selector*

You can skip this section if you do not use the module *Brand Template Builder* (BTB for short) in your organization.

For the planned production of a new image flyer, you are processing a job that has the *Select document* variable. The variable is on the *Flyer* tab on the data sheet created for this purpose. You want to use the variable to select an existing document in the *Brand Template Builder* module and add it to the data sheet.

PrerequisiteThe Select document variable is stored on the data sheet of the type used and you are the creator of the job or authorized to edit the document selection.

1. Open the data sheet and go to the *Flyer* tab.
2. Click on the *Add Document* button.

   The *Search documents* selection dialog box opens. You are in the search function for the *Brand Template Builder* module.
3. Search for a document.
4. In the hit list, select the desired document and click on *Use selected documents*.

   Note: You can select multiple documents.

   The document is inserted on the data sheet. Below the preview image, you can open a menu with the following functions:

   - *Edit* : The document wizard opens in a pop-up window.
   - *Delete* : This removes the document from the data sheet.
5. In the upper area of the data sheet, click on *Save* to save your selection.

   The data sheet remains open for further editing.

   Note: You must have the relevant permissions to edit the document.
6. Close the data sheet by clicking in the close field ×.

The selected documents have been successfully placed on the data sheet.

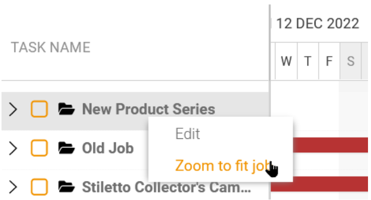
4.5 Editing jobs in Gantt mode

The option of working in Gantt mode allows Ron to view and manage his marketing campaigns in chart form. In Gantt mode, workflows and workflow steps are displayed as bar charts on a timeline, making it easy to see duration, progress, and interdependencies.

1. Expand the desired job or process by clicking on the right arrow > in front of the checkbox and in front of the job name in the left-hand column *Task Name*.

   You will now see the names of all workflow steps.

2. Right-click on the name of the job or process to show the options menu. There you can use the menu command *Zoom to fit job* to display the view optimally over the whole width and height. From here, use *Edit* to open the data sheet in the current workflow step for editing.

3. Move the mouse over the chart to get information about the job or process or an individual workflow step.

4. Click on one of the Gantt bar charts on the timeline to open the job's data sheet in the *Workflow* tab. The relevant assignees and the start and end dates of the workflow steps can be entered or adjusted here. See *Scheduling a workflow* on page 48

   Note: You cannot use the mouse to move the bar graphs in order to change the start or the end.

5. Optional: Double-click on the job name in the left-hand column to open the job data sheet in the current workflow step.

6. Make your changes and entries in the data sheet.

7. Save the changes, forward the workflow step, and close the data sheet by clicking on the close field ✕ .

You have edited the job in Gantt mode.

4.6 Changing the assignee of a current workflow step

A job is in the *Create* step and Ron has assigned the job in this step to the user Peter. However, Peter is sick and, in order not to lose time, Ron wants Alex to take over the job.

Prerequisites

- The job/process must not be in the initial workflow step.
- You have the appropriate permissions in your user role for the Job Manager module. If there is a pencil icon with the text *Workflow* to the right of the workflow breadcrumb navigation in the open job data sheet, you are allowed to change the assignee.
- Special feature for processes: Changing the user for a process is not possible if a user was selected directly during forwarding. Here it is assumed that the correct user was selected at this point. If the workflow step is forwarded to a group, there are two possibilities: The workflow step has not yet been accepted by a user. In this case, the user who is to take over can accept the work package directly (see *Dashboard* on page 25). Only after the workflow step has been accepted by a user is the Change assignee function is also available.

1. Open the data sheet.
2. Click on the … menu in the header of the data sheet.
3. Click on *Change assignee*.

   The *Participants* dialog box is displayed.
4. Select a user.
5. Optional: Check the workload of the selected user:
   a. Click on *Check workload chart*:

      The workload of the user is displayed.
   b. If the selected user is already working at full capacity, you may select another user.
   c. In the *Participants* dialog box, assign yourself as the assignee by clicking on *Assign to me*.
6. Optional: Enter a comment.
7. Click on *Save*.

A confirmation prompt is displayed.

8. Click on *Yes*.

You have changed the assignee of the current workflow step.

Provided you have the proper permissions, you can also go via the *Details* tab in the sidebar instead of the … menu in steps 2 and 3. Then click on the icon after the current Assignee(s) in the *Assignee(s)* line or on the colored text *Assign to me* below it.

4.7 Interacting with colleagues

Ron is a marketing operations manager who is aware of the importance of interacting regularly with his colleagues. For him, using the appropriate function for different communication situations is the key to success. He uses the job discussion to quickly and easily talk to his colleagues about ongoing tasks or projects. He uses the e-mail function to send or receive formal or confidential messages. Ron provides constructive feedback to those involved and asks for advice himself when needed.

> Note
>
> If you don't find your way around immediately: The *Comments* tab above the data sheet may have been renamed for specific customers. The tabs of a data sheet can also be customized for creators, assignees, and participants when configuring and creating a type. They can also be shown or hidden individually for each workflow step.

Associated tasks

- *Job discussions under the Comments tab* below
- *Job discussion in the sidebar* on page 140
- *Sending messages to participants* on page 142
- *@-mention* on page 143

4.7.1 Job discussions under the *Comments* tab

Each data sheet has the general job discussion preconfigured under the *Comments* tab. This discussion can also be found in the sidebar of the data sheet.

Functions of the Job Discussion

The following table lists all the functions available to you on the *Comments* tab. Not all of them are available to you in the Job Discussion sidebar. For example, the option *Add Asset* is missing there.

Button/Function	Description
Add Discussion	Use this button to create a new discussion in the *Comments* tab in the data sheet. Enter a name for the discussion and save the entry. You can then write comments. This discussion may have fewer and different participants than the standard job discussion. To configure the discussion, see "..." at the bottom of the table. You can add assets to the discussion. To open the drop-down menu, do not click the *Add Asset* button directly. Instead click on the downward triangle arrow ▾ . This opens a menu: • *Upload new assets* : This adds a locally saved image file to the data sheet • *Add from Own collection* : This adds an asset from your Media Pool collection *Own DSE Pictures* to the data sheet. • *Select asset* : This opens a search in the Media Pool to select an existing asset to attach to the discussion. The added asset can be the subject of a general comment or a discussion in the scope of a review.
Add comment	In this text field in the sidebar of the data sheet, you can directly create a new comment in the job discussion without having to switch to the *Comments* tab. Note: Writing comments in the comments area of the right sidebar and on the *Comments* tab on the data sheet is synchronous in both directions. The sidebar content is not fully updated until you close the data sheet.
Private message	After you have activated the checkbox, you will be asked to select a user or user group as the exclusive recipient for the discussion post or comment. If you post a reply in response to another comment, you cannot mark it as private. For users who are neither writers nor recipients, private messages do not appear in the message history.

Button/Function	Description
Reply	If you click *Reply* at a post entry, you can reply to it directly and your reply will initially appear immediately below collapsed under *N more comments*. Users can reply directly to comments in the job discussion in the sidebar or under the *Comments* tab. Replies are shown indented next to the comment and can only ever be created at the first level. This excludes replying to replies. Replies are initially hidden in the display. Click on *N more comments* to show all existing replies to an entry. Click on *N more comments again* to hide the reply history again.
...	In the **...** menu at the top right of the discussion, you can access the following functions: *Print as PDF* : This creates a PDF file of the discussion. *Configure Discussion* : In the discussion configuration, you can change the name of and participants in the discussion. This only applies to new discussions you create. Note: Participants must have appropriate rights in their user role to be invited to an asset review under *Comments*.
	Use the pencil icon to open the selected (own) comment for editing to make adjustments to the content.

Button/Function	Description
... (on the asset)	You can use the following functions for the assets added to a comment: • *Open* : This opens the detailed view of the asset in a pop-up window. • *Open Review* : This allows you to load the asset to the Review Manager module and start a new review. • *Large Preview* : This opens a large preview image in a pop-up window. You can call the detailed view of the asset from the dialog box. • *Remove* : This removes the asset from the data sheet. • Send As Email: This opens a new dialog box where you can send the asset by e-mail. • *Download* : This opens a new dialog window where you can download the asset and save it locally. Note: The available functions depend on the permissions of your user role.

You can find more information at:

- *Job discussion in the sidebar* on the next page
- *@-mention* on page 143

Setting up your own discussion

Here you will find out how to set up your own discussion. This may have a different topic and different participants than the standard job discussion.

1. Open the job and go to the *Comments* tab, where you can manage your discussions.
2. Click on ... > *Configure Discussion*.
3. Select the discussion that you want to configure and then click on ... > *Configure Discussion*.
4. Optional: Create a new discussion by clicking the *New Discussion* button.
5. Enter a name for your discussion or change the existing name.

   The name should be meaningful so that other participants know what the discussion is about.

6. Click on *Save*.
7. Click on … > *Configure Discussion*.

   Now you can add participants to your discussion.
8. To invite participants to the discussion:
   a. Click on the down arrow ▾ at the end of the *Add participant* field.

      The list of possible participants are users who have already been added to the job under the *Participants* tab or per @-mention as participants.
   b. Select the users you want to participate in the discussion.
   c. Optional: Delete participants from your discussion by clicking the trash icon after a name in the list.

Your discussion is now configured and ready to share messages, files, or other content.

Writing a comment

1. Open the job and switch to the *Comments* tab.
2. Click on ▾ at the desired discussion.

   The comment field opens.
3. Write your comment. Optionally, format the text using the editing tools above the comment field.
4. Optionally, mark the comment as *Private message* and select a user or group as the addressee of the private message.
5. Click on *Save*.

The comment is saved.

4.7.2 Job discussion in the sidebar

The job discussion is a preconfigured function on the *Comments* tab that is used to facilitate communication with other participants in a job. Here you can write comments about the job and read the feedback received.

To use the full range of functions, you must switch from the job discussion in the sidebar to the *Comments* tab. There you can then upload assets to the discussion, for example. See the chapter *Job discussions under the Comments tab* on page 136

View

You can reach the job discussion at any time in the sidebar of the job data sheet, regardless of which tab you are currently on. In addition to the actual comments, a chronological overview of the system events relevant to this job is also displayed there, such as the forwarding of a job/process in the job workflow.

In addition to your comment, you will see the following information:

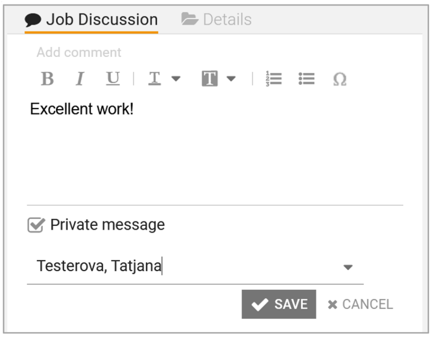
- The name of the user who wrote the comment.
- The date and time the comment was created under the writer’s initials.

If the discussion area takes up too much space when you are editing a data sheet, you can hide the right sidebar completely by clicking the right arrow ▸ in the center of the separator bar. This will display the data sheet tabs and field variables in full screen width.

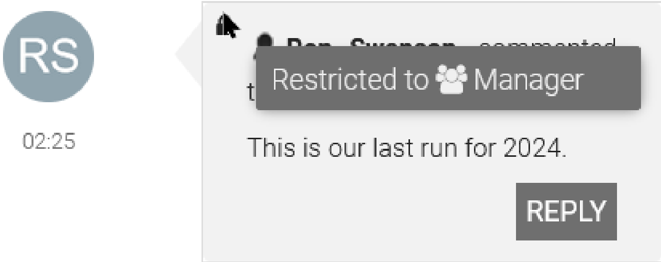
Click on the left arrow ◂ while the right sidebar is hidden to show the sidebar again.

To write a comment in job discussion in the sidebar:

1. Open the data sheet of the job you want to write a comment about.
2. If the *Job Details* are displayed, click on the title to activate the *Job Discussion* tab in the right sidebar.
3. Click in the text field *Add comment* below the toolbar and enter your comment.
4. Optional: You can format your comment with the text tools in the toolbar, e.g. bold, italic, or underlined, adjust the color, and create lists.
5. If you wish, you can mark your comment as confidential by checking the box next to *Private message*.



Confidential comments are restricted to selected participants or user groups of the job and are marked with a lock icon.



6. Click on *Save*.

Your comment will be added to the discussion chronologically.

4.7.3 Sending messages to participants

You want to send a message by e-mail to multiple participants or just one participant of a job/process.

Prerequisite *You are the creator of the job or have corresponding permissions.*

Sending a message to all participants

1. Open the data sheet.
2. Go to the *Participants* tab.
3. Click on *Message to All*.
4. This opens the *Message* dialog box. The participants are already entered as recipients.

   Note: Click on the × symbol after the name to remove a participant from the recipient list.
5. Optional: You can add additional recipients by searching for users using the input field. If the user is not a participant, you are asked whether you want to add this user as a participant. Note that you can still send the message to the user even if you do not enter the user as a participant.
6. Enter the subject and the message in the input fields.
7. Choose *Send*.

The message is sent to all the recipients.

The recipients will receive an e-mail with the subject *Job: Added as participant*.

Sending a message to individual participants

You do not want to include all participants and only want to send a message specifically to one person.

1. Open the data sheet.
2. Go to the *Participants* tab.
3. Click on the letter icon next to any participant to whom you want to send the message.

4. Enter the subject and the message in the input fields.
5. Choose *Send*.

The message is sent to the selected recipient.

4.7.4 @-mention

With an @-mention in the comment, Ron as the responsible person can invite a user as a participant or directly address an existing participant. The @-mention is a quick way to invite colleagues to a discussion without having to go through the *Participant* tab. An @-mention includes *@username* anywhere in the post. Ron can mention a user in a post or comment with the @ symbol to address them directly or invite them as a participant.

> Note
>
> The users you see in the drop-down list depend on your user role in the *Job Manager* module:
>
> - If your role does not have the permission to invite other users as participants to the job/process, you will only be shown users who are already participants in the job or process.
> - If your role has the right, users who are not yet participants in the job or process will also be displayed.
>
> If you add them, these users will become participants.

These are the steps for creating an @-mention:

1. Type @ in the comment field.

   A list of authorized users is automatically displayed.

2. Type the first characters of the name.

   A list of matching users is displayed.

3. Navigate to the required entry in the user list using the arrow keys and on the keyboard.

4. Press to accept the selected user.

   A confirmation dialog box opens if the user is not a participant in the current job.

5. Click on *YES* to grant the user access and add that user as a participant to the job.

The mentioned and thus invited participants will appear in the *Participants* tab and will be notified via system notification and/or e-mail, and will be able to open and respond to the job data sheet in the *Comments* tab in the message using the *View Discussion* button.

4.8 Managing tasks

For Marketing Manager Ron and his team, it is important to have an overview of the individual tasks of a job. The Task Manager allows him to efficiently manage tasks that belong to a job.

The management of tasks in workflows that have already been started includes the following functions: *Reschedule*, *Change Status*, and *Time Recording*. This allows Ron to react flexibly to changes and document work progress.

When rescheduling, he can change or adjust the user, date and time of a task if, for example, requirements or priorities change.

By regularly updating the status, everyone involved can track the progress of the task and identify possible delays. By recording the required working hours, it is possible to measure productivity, calculate costs, and plan resources.

Associated tasks

- *Rescheduling tasks* below
- *Changing the task status* on the next page
- *Recording the work time required* on page 149
- *Assigning a task to a workflow step* on page 79

Back to *Editing a job* on page 87.

4.8.1 Rescheduling tasks

Ron has created a job in the *Digital Production* category. The task *Photo Shoot* is assigned to the workflow step *Creation*. There, the start date is set to 27.01.2023 and the end date is set to 01.02.2023.

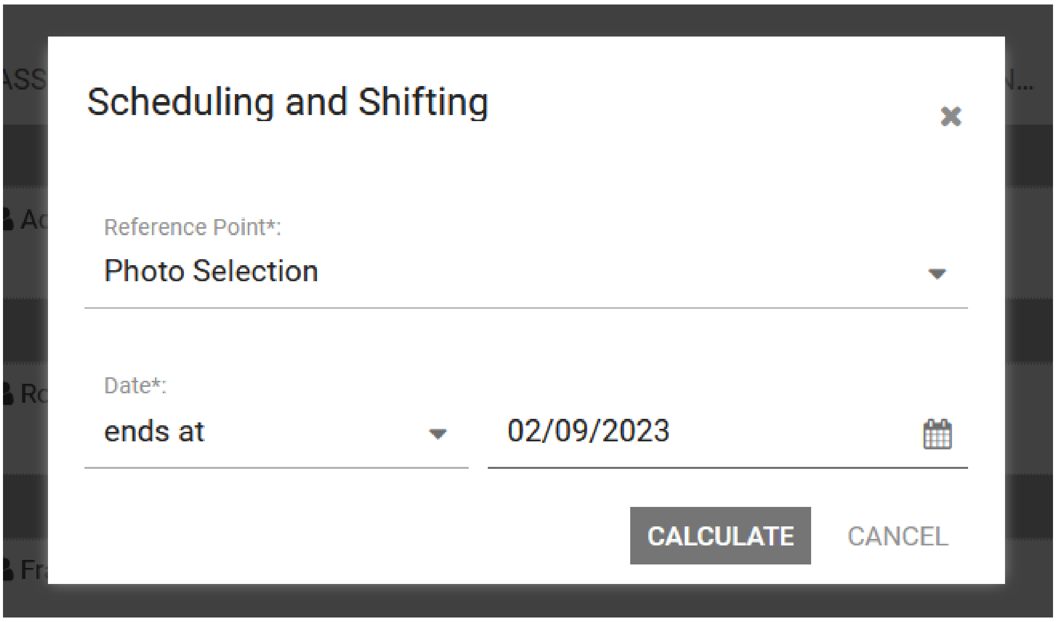
Because the deadline for the photo shoot cannot be met, he now wants to adjust the deadlines for the tasks in this workflow step and in the subsequent tasks. To do this, he must first agree on a new date with the photographer and the model agency. He also has to make sure that the quality of the photos and the final product is not compromised due to the deadline pressure.

In accordance with these requirements, Ron, starting from the *Photo Shoot* task, would like to postpone this task and the tasks in the *Creation*, *Review*, and *Production* workflow steps by three days. The new start date for the *Photo Shoot* task is to be 30.01.2023.

Scheduling and postponing

1. Open the data sheet and switch to the tab with the *Task Manager*.
2. Click on *Menu*▼ > *Scheduling*.

   This opens the dialog window *Scheduling and Shifting*.
3. From the drop-down list *Reference Point*, select the task *Photo Shoot*.
4. From the drop-down list Date, select the entry *starts at*.
5. Optional: Select the entry *ends at* to schedule the tasks backwards from the specified Date.
6. Use the date picker to select the date *30.01.2023* as the new Start date. You can also enter the new Start date manually in the format TT.MM.YYYY.
7. Click on *Calculate*.



The start and end dates of all tasks are recalculated and accepted. This means that the start and end dates of the other tasks and the end date of the entire job (*Finish* column) are postponed according to the recalculation in the schedule.

Weekends are automatically left out of the recalculation.

4.8.2 Changing the task status

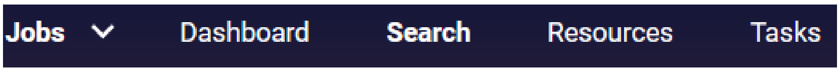
Ron has assigned you the task *Photo Shoot* for a new campaign. The photo shoot is finished and you now want to change the status of the task from *In progress* to *Done*. You can access the Status menu both directly in the open job in the Task Manager or in the module navigation under *Tasks*.

Prerequisites Navigation for tasks and time recording has been enabled by the administrator.

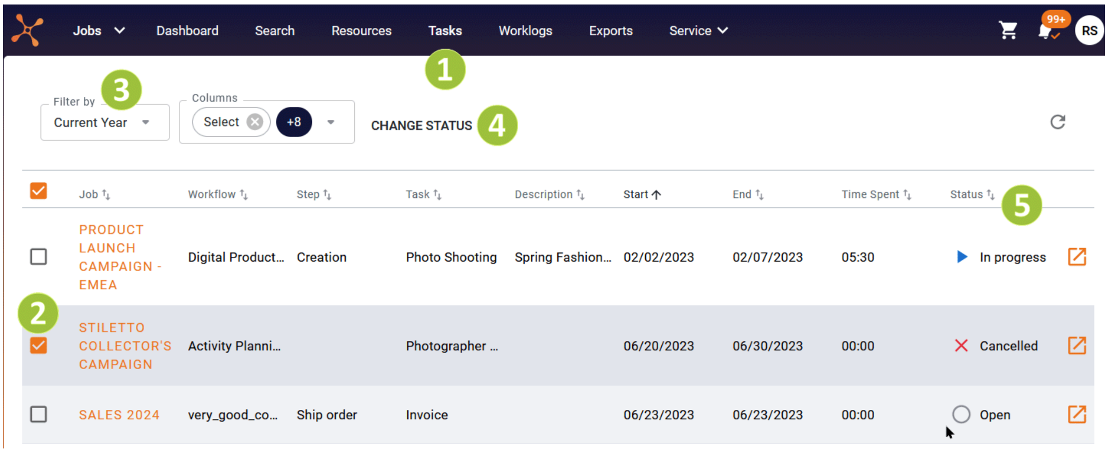
Tasks page

On this subpage in the Job Manager module, you will find an overview of all tasks assigned to you without having to open the associated job.

You can access the page in the Job Manager module in the module navigation under *Tasks* 1 .



Similar to the job overview, you can filter here to find tasks that have already been completed, paused, and canceled, for example, or search in specific time periods. You can also make a (multiple) selection and change the status. You can sort each column in ascending and descending order by clicking on the column header.



Function/Name	Description
Multi select 2	Check the column header to select all or check individual tasks.
Filter by 3	Allows filtering by time period or status to narrow the view. For example, use the option *Open* to list all tasks that have not yet been started.
Columns	Allows you to adjust the number of displayed columns by deselecting the checkboxes.
Change Status 4	The button is enabled once you select one or more tasks and opens the Status menu.
Job	The name of the job that contains the task.
Workflow	Current workflow step

Task	Displays names of the tasks assigned to you.
Description	Optional description text
Start	Entered start for the task
End	The planned end for the task
Time spent	Working hours recorded with time recording for this task
Status 5	Allows you to filter the view by the status of the tasks.
External link	Clicking on the icon opens the job containing the task to be processed.

You have called up the *Tasks* page and learned about the functions.

Changing the status on the *Tasks* page

Changing the status of a task on the *Tasks* page is always useful if you have already forwarded the associated workflow step. You may then no longer have direct access to the job and the job data sheet, but you can still update the status.

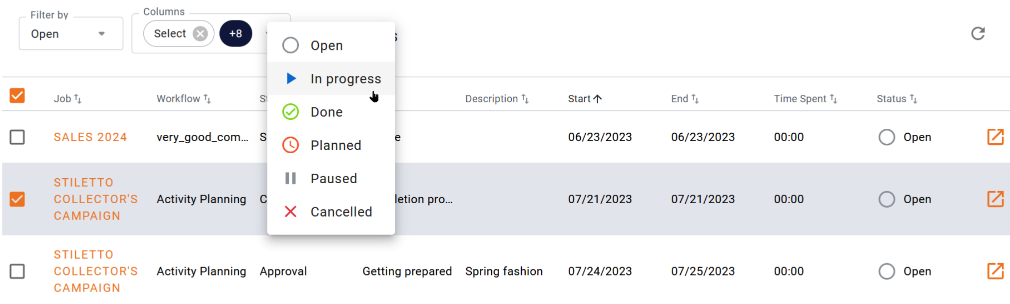
1. In the navigation bar of the Job Manager, click on *Tasks*.

   You will see an overview of your assigned tasks.

2. Select the checkbox in front of the completed *Task*.

   This enables the text button *Change Status*.

3. Click on *Change Status* to adjust the status for the selection.



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

5. Optional: In the case of a multi-select, a confirmation prompt appears, which you confirm with *YES*.

Note

By enabling the checkboxes in the left column, you can make a multiple selection of tasks and thus adjust multiple statuses in a single operation.

You have changed the status of a selected task. The new status is displayed in the overview.

Changing the status in the job data sheet

Before forwarding the job to the next workflow step, you want to update the status of the associated task and change it to *Done*.

1. In the data sheet of the job, navigate to the tab for task management.

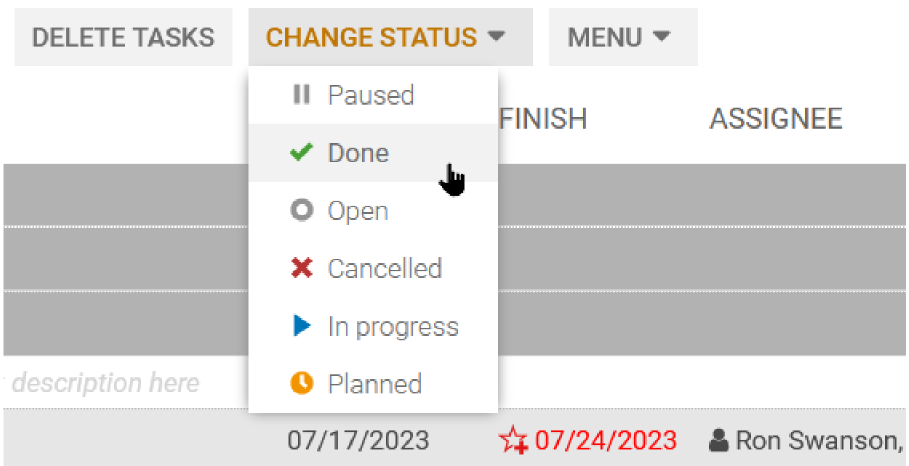
   The overview of all tasks in this job appears.

2. Click on the gray bar of the workflow step to display the associated tasks below it.

3. Optional: Select *Menu* ▾ > *Expand all*.

   This opens all workflow steps, so all assigned tasks are visible.

4. Select *Change Status* > *Done*.



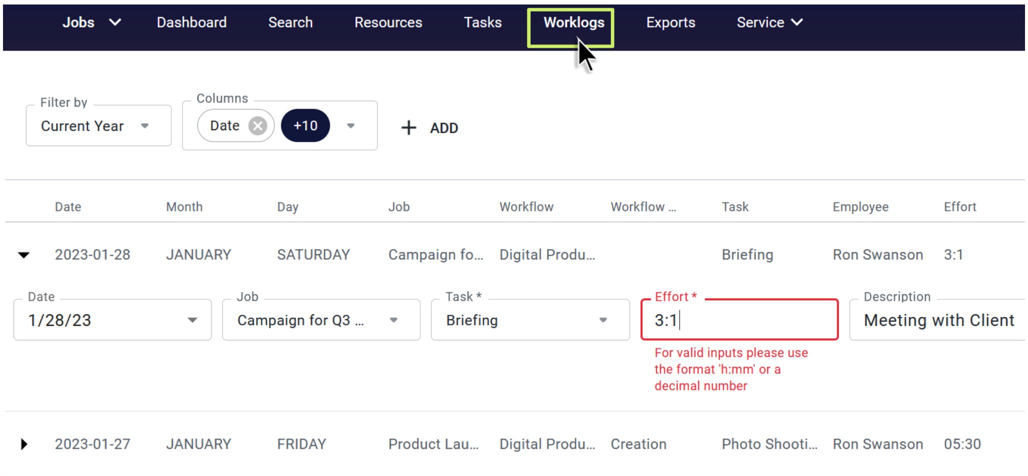
You have changed the status of the task under the current workflow step.

4.8.3 Recording the work time required

You have been assigned the *Photo Shoot* task of the job *Product Launch Campaign - EMEA*. You have completed the task and now want to record the time spent (5.5 hrs) for the task.

Prerequisites

- Navigation for tasks and time recording has been enabled by the administrator.



- The job is not completed, canceled, or deleted.
- No *Period for time recording lock* has been created for the job in the Task Manager.
- The status of the task is neither *Done* nor *Cancelled*.

Entering working hours

1. Click on *Worklogs* in the upper navigation area in the job overview.
2. Click on the *Add* button.

   This activates edit mode. The current date is automatically entered in the *Date* column.
3. You can expand the line using the right arrow ▶.
4. Click in the *Job* cell.

   This activates edit mode. The jobs assigned to you are loaded to the drop-down list automatically.
5. Select the job.
6. Click in the *Task* line.

   The Tasks assigned to you for the selected job are loaded to the list automatically.
7. Select the task for which you want to record time.
8. Click in the *Effort* line.

   This activates edit mode.

9. In the cell, enter your work time required as a value, e.g. *5:30*.

   All of the remaining cells, e.g. *Workflow* and *Workflow Step*, are filled automatically.

10. Optional: Click in the *Description* cell to enter further information about the task.

The times stored in the Task Manager (*Planned*, *Actual*, *Remaining*) are updated.

> Note
>
> Time entries in the time recording function are automatically formatted and saved according to the default format *hh:mm*. "." or "," (period, comma) can be used as a decimal separator for floating point numbers. The times entered are converted to the default format and rounded.

4.8.4 Setting up a time recording lock

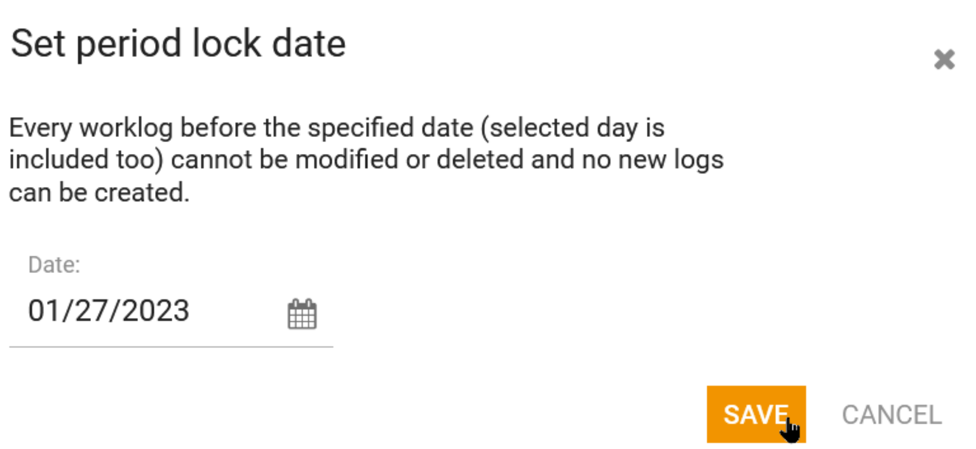
Ron is instructed by Accounting on January 27 to lock time recording for all jobs in the month of January due to the internal accounting close. This is a security measure to ensure that time recording is only carried out for authorized jobs. If conditions change, he can also re-enable time recording.

1. In the data sheet of the job, navigate to the tab for task management.

   The overview of all tasks in this job appears.

2. Select *Menu* ▾ > *Time Tracking period Lock Date*.

   The dialog box below opens.



3. Use the date picker and select January 27.

This will lock time recording and prevent editing for all tasks in the job before and including 01/27.

Note

The time recording lock must be set individually in the Task Manager of each running job in question. Batch processing is not possible.

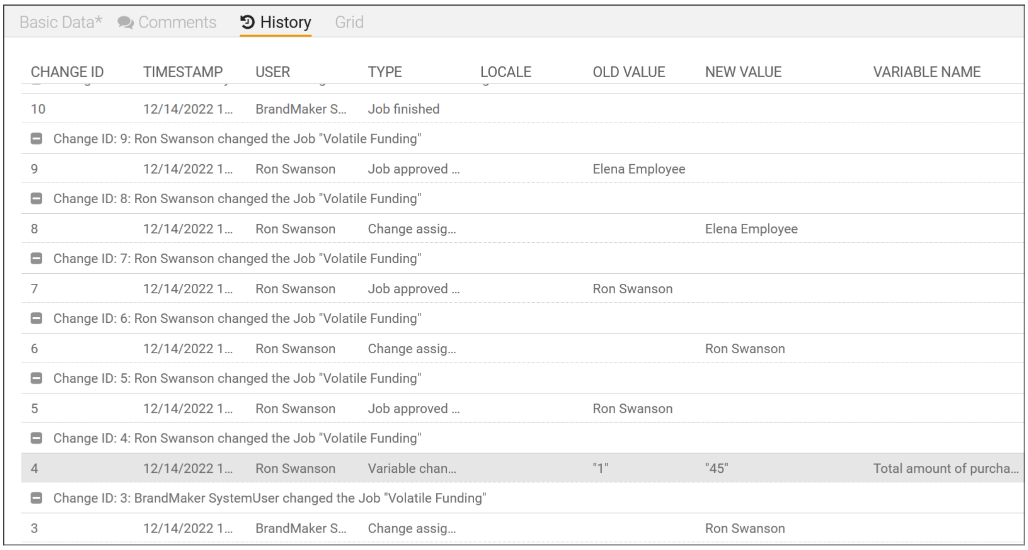
4.9 Change history

Ron has created or edited a job or process in the Job Manager. After the completion of the job, he wants to know how the job has changed over time. He wants to find out who changed what and why. To do this, he opens the change history and finds all the information he needs. He can filter the changes by date, author, or reason. He can also view the details of each change. Ron uses this function for analysis and saves the history as a file for third parties for documentation purposes. The time required is also logged.

Information in the change history

This information is displayed in a tabular overview:

- *Change ID*: Sequential numbering of changes (Job Manager only)
- *Timestamp*: The date and time when the change was made.
- *User*: Name of the user who added or edited a comment or discussion.
- *Type*: The type of editing or change, e.g. the addition of a new comment.
- *Locale*: This column has no meaning in the Job Manager module.
- *Old value*: The original value of an edited variable.
- *New value*: The new value of an edited variable.
- *Variable name* : The name of the variable or discussion that was changed. Select the line to display the old value on the left and the new value on the right in the lower part of the dialog box.



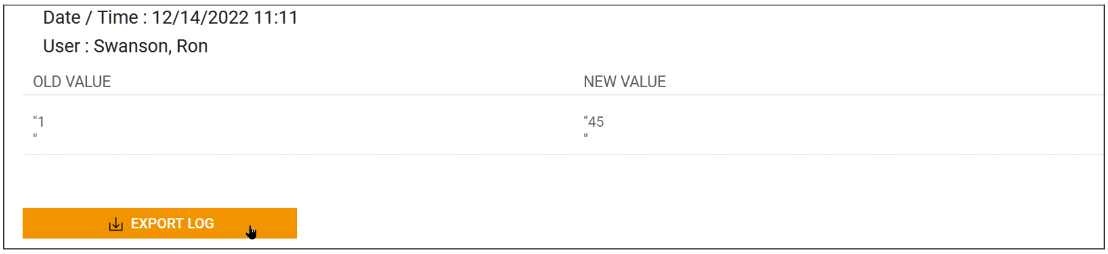
CHANGE ID	TIMESTAMP	USER	TYPE	LOCALE	OLD VALUE	NEW VALUE	VARIABLE NAME
10	12/14/2022 1...	BrandMaker S...	Job finished				
Change ID: 9: Ron Swanson changed the Job "Volatile Funding"							
9	12/14/2022 1...	Ron Swanson	Job approved ...		Elena Employee		
Change ID: 8: Ron Swanson changed the Job "Volatile Funding"							
8	12/14/2022 1...	Ron Swanson	Change assig...			Elena Employee	
Change ID: 7: Ron Swanson changed the Job "Volatile Funding"							
7	12/14/2022 1...	Ron Swanson	Job approved ...		Ron Swanson		
Change ID: 6: Ron Swanson changed the Job "Volatile Funding"							
6	12/14/2022 1...	Ron Swanson	Change assig...			Ron Swanson	
Change ID: 5: Ron Swanson changed the Job "Volatile Funding"							
5	12/14/2022 1...	Ron Swanson	Job approved ...		Ron Swanson		
Change ID: 4: Ron Swanson changed the Job "Volatile Funding"							
4	12/14/2022 1...	Ron Swanson	Variable chan...		"1"	"45"	Total amount of purcha...
Change ID: 3: BrandMaker SystemUser changed the Job "Volatile Funding"							
3	12/14/2022 1...	BrandMaker S...	Change assig...			Ron Swanson	

Functions

In the upper area of the open data sheet, click on the *History* tab to open the change history in a new dialog box.

If you click on an individual event, a comparison between the old value and the new value is displayed below the table.

To export the complete change history of the job/process as a table in XLSX format, click on the button *Export Log*.



The Excel export can be useful if you want to share the history with others or you want to archive it.

> **Note**
>
> The change history does not show every system event and does not fully map the process, but rather only provides the before/after status to provide a general overview.

4.10 Prioritizing elements

Ron often uses the Gantt mode in the job overview. This mode does not allow him to sort by columns and prioritize this way. He can nevertheless prioritize individual elements (jobs) in the Gantt chart by moving them up or down. The higher a job is in the Gantt chart, the higher its priority. Ron does this to ensure that the most important jobs are processed first.

To highlight jobs or processes that need to be processed urgently, you can prioritize the jobs or processes in the Gantt view. The prioritization is available to all users.

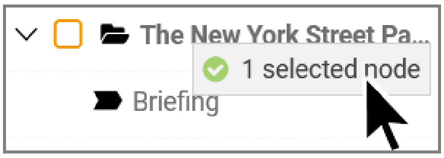
> **Note**
>
> It is not possible to move individual workflow steps with the mouse, only the entire job/process.

Using the following steps, you can drag and drop jobs or processes with a higher priority further up the list.

1. Hover the mouse pointer over a job entry (folder icon) in the column on the left entitled *Task Name* so that the mouse pointer changes its appearance to move mode:

2. Hold down the mouse button and drag the job or process upwards in the list to the desired position.

   Only one job can be moved at a time.

   The green checkmark on the mouse pointer indicates whether insertion points are possible.

3. Release the job at the desired position.

4. Optional: You can also move a job or process down in the list to reduce its urgency.

The prioritization is saved and is also applied to the Kanban view. All users using the same filter in Gantt mode will see this modified order.

Note

Since the calculation of the charts requires computing time, it is recommended to set a filter to as few types as possible or to *My Active jobs (ToDos)*, for example, before using Gantt mode. Without a restriction, leaving an open job or process until returning to the Gantt view would take an unusually long time.

4.11 Forward or return?

Elena opens a job with a workflow step to which she is assigned as the assignee. Before she starts with processing, she checks that all the required information is there. If she finds it inconsistent or incomplete, she must decide whether or not she wants to return the job. She will return the job if she finds content errors, if data or assets are missing or out of date, or if she does not have time to process it. She will forward it if she has completed and closed all her tasks associated with that step. When she forwards or returns a workflow step, the recipient receives an e-mail and a system notification.

Associated tasks

- *Forwarding a job* on page 80
- *Returning* on page 84

Diese Seite wurde absichtlich leer gelassen, um sicherzustellen,

dass neue Kapitel auf einer rechten (ungeraden) Seite beginnen.

Archiving jobs 5

Ron is a campaign and marketing manager and has many jobs and processes to manage. He wants to keep his job overview clearly organized and up to date. There are several ways Ron can remove a job from the job overview. For this reason, his choice of functions offered by the system depends on the specific context. He can finish a job if it has been brought to completion, delete a job if it is no longer relevant, or cancel a job if there is something wrong with it or the campaign has been postponed. This way, he can ensure that he only sees the jobs and processes that are important to him.

The term “Archive” is used as a generic term for three specific actions: *Finish/Complete*, *Cancel*, and *Delete*. These have different effects on the data and on whether the job can be reactivated. “Finish” means that the job has been completely processed and the data has been saved. The job/process can be reactivated. “Delete” means that the job is no longer relevant and the data is deleted. In this case, the job can only be reactivated if it is not a process type. “Cancel” means that the job was canceled during processing and the entered data is retained. The job/process can be reactivated.

Associated tasks

- *Finishing a job* on the facing page
- *Canceling a job* on page 164
- *Deleting a job* on page 168
- *Reactivating jobs* on page 172

5.1 Finishing a job

Now that all employees have completed their alloted tasks according to the work-flow steps and ensured the quality of the data, the job is ready for completion after final review by Ron.

Complete / Finish

To finish a job/process, you can do this in two different places in the module: Use the *Complete* buttons in the job overview toolbar or *Finish* or Complete in the open data sheet to finish and archive a job or process and remove it from the list of jobs/processes to be processed. It makes no difference which option you choose.

The prerequisite is that you are the creator of the job/process or have the appropriate permissions in your role in the Job Manager. If the *Complete* button is missing in the job overview, you cannot finish jobs.

Note

This action does not permanently delete the job. Completed jobs disappear from the view with the tasks to be done. The job remains archived for future reference.

DIFFERENCES BETWEEN A JOB AND A PROCESS

Ron opens the data sheet of the job and clicks on the *Finish* button in the upper left corner, which is located in the last workflow step there instead of *Forward*. He enters a comment, presses *Save* to complete the job, and flags it as finished.

If Ron wants to finish a process instead, he has to click on the *Complete* button in the last workflow step of the process in the data sheet, which is located in the function bar below the job overview. This ends the entire process and archives it.

Completing in the job overview

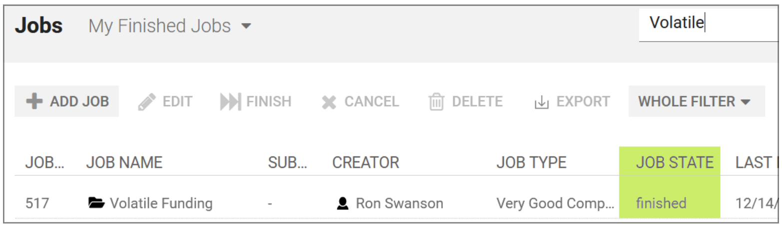
> **Note**
>
> You can only select one job at a time to Finish. In case of a multi-select, the *Complete* button remains disabled to prevent operating errors.

1. Open the job overview > *Jobs* > *Search* and filter by the job.
2. Select the entry.
3. In the button bar above the job overview, click on *Complete*.

   This opens a new dialog box entitled *Finish Jobs*.

4. Optional: Enter a comment if required.
5. Click on *Save*.

The job disappears from the current job list and the job status is set to *finished*. The creator can still find it under *My Finished Jobs*. Other users with the appropriate permission can check under *All Finished Jobs*.

Finishing in an open data sheet

1. Select the entry in the overview and open the job/process.

   In the open data sheet, the *Finish* button is displayed for jobs or the *Complete* button for processes in the last workflow step.

   .

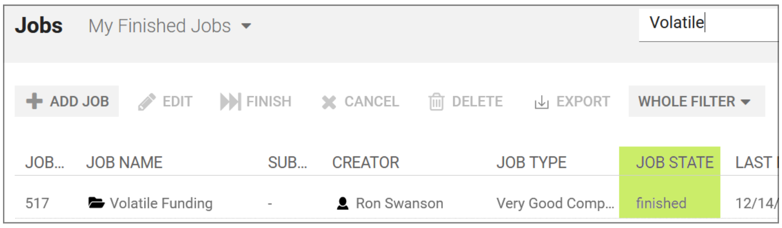
2. In the upper area of the data sheet, click on *Finish* or *Complete*.

   This opens a dialog box entitled *Finish Jobs*.

3. Optional: Enter a comment if required.

4. Click on *Save*.

The job disappears from the current filter list and the job status is set to *finished*. The creator can still find it in the filter heading *My Finished Jobs*. Other users with the appropriate permission can check under *All Finished Jobs*.

5.2 Canceling a job

Ron is responsible for creating an image flyer. He created a job for the planned production of the flyer, but now he has found out that the flyer won't be needed until a few months later. He wants to cancel the job so that it disappears from the list of jobs to be processed for everyone.

The *Cancel* function in the button bar of the job overview is available for this purpose.

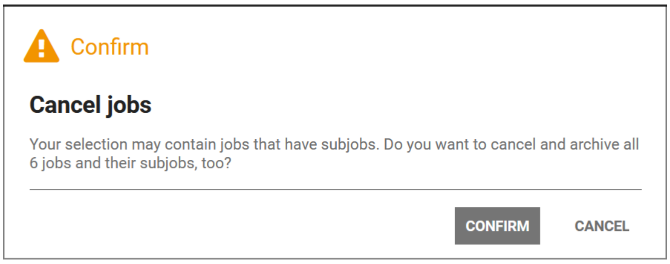
> **Note**
>
> This action does not make the job disappear permanently. Canceled jobs disappear from the filter view with the to-dos. The job is archived for future reference and possible reactivation.

Prerequisite If the Cancel button is missing in the job overview, you cannot use this function.

Canceling in the job overview

1. Open the job overview > *Jobs* > *Search* and filter by the job.
   - One job: Click on the line of the job that you want to cancel.
   - Multiple jobs: Use CTRL-click or CMD-click to make individual selections or SHIFT-click on start and end element for the entire range.
2. Click on *Cancel*.

   This opens the confirmation dialog box.

   > **Note**
   >
   > Please note the difference between the buttons in the confirmation dialog box in order to avoid unwanted results. The *Confirm* button completes the cancel operation, while the *Cancel* button cancels the operation and the jobs/processes remain in their current status.

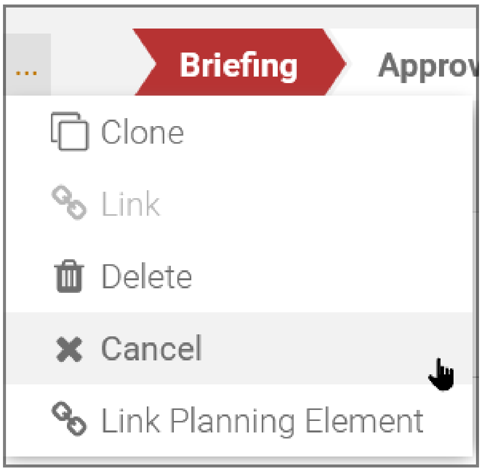
3. Click on *Confirm*.

You have canceled the job/process. The job disappears from the current filter list and the job status is set to *Canceled*. All participants are notified by the system. The creator can still find it through the *My Canceled Jobs* filter. Other users with the appropriate permission can find these jobs under the filter option *All Canceled Jobs*.

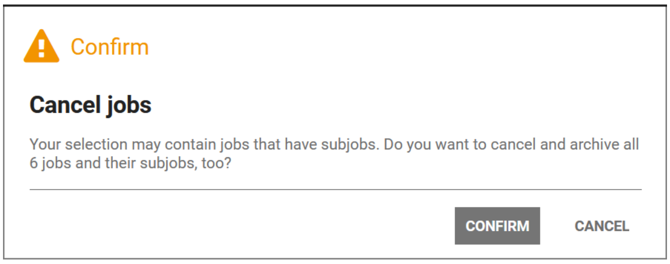
Optional: You can use a filter operation to cancel all filtered jobs/processes at once by calling the menu command *Cancel jobs* in the *Whole filter* menu and confirming the dialog.

Canceling in a data sheet

1. Open the job.
2. In the open data sheet of a job/process, open the … menu and select the menu item *Cancel*.



3. This opens the confirmation dialog box.

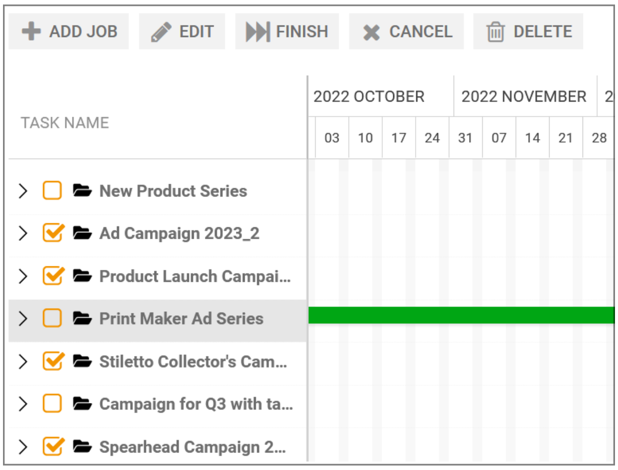


4. Click on *Confirm*.

You have canceled the job/process. The job disappears from the current filter list and the job Status is set to *Canceled*. All participants are notified by the system. The creator can still find it in the filter heading *My Finished Jobs*. Other users with the appropriate permission can check under *All Finished Jobs*.

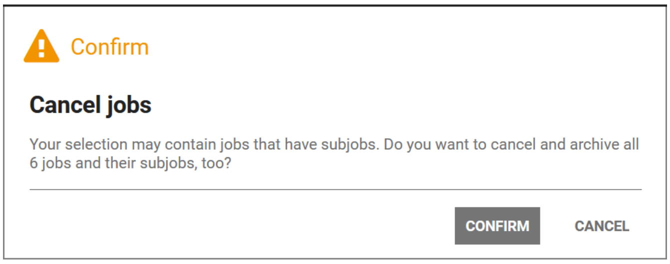
Canceling in a Gantt chart

1. On the left-hand side under *Task Name*, activate the checkboxes of the jobs/processes.



2. In the button bar, click on Cancel.

   This opens the confirmation dialog box.



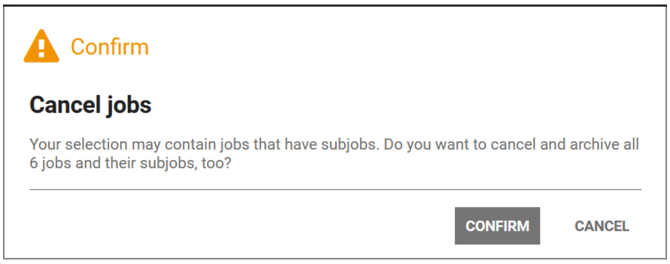
3. Click on *Confirm* to delete the selected jobs/processes or sub-jobs.

You have canceled the selection and the job disappears from the current view. All participants are notified by the system.

Canceling in the Kanban view

1. Click on a free area of the Kanban card to select it.
   - One job: Click on the card of the job that you want to cancel.
   - Multiple jobs: Use CTRL-click or CMD-click to make individual selections or SHIFT-click on start and end element for the entire range.
2. In the toolbar above the Kanban overview, click on *Cancel*.

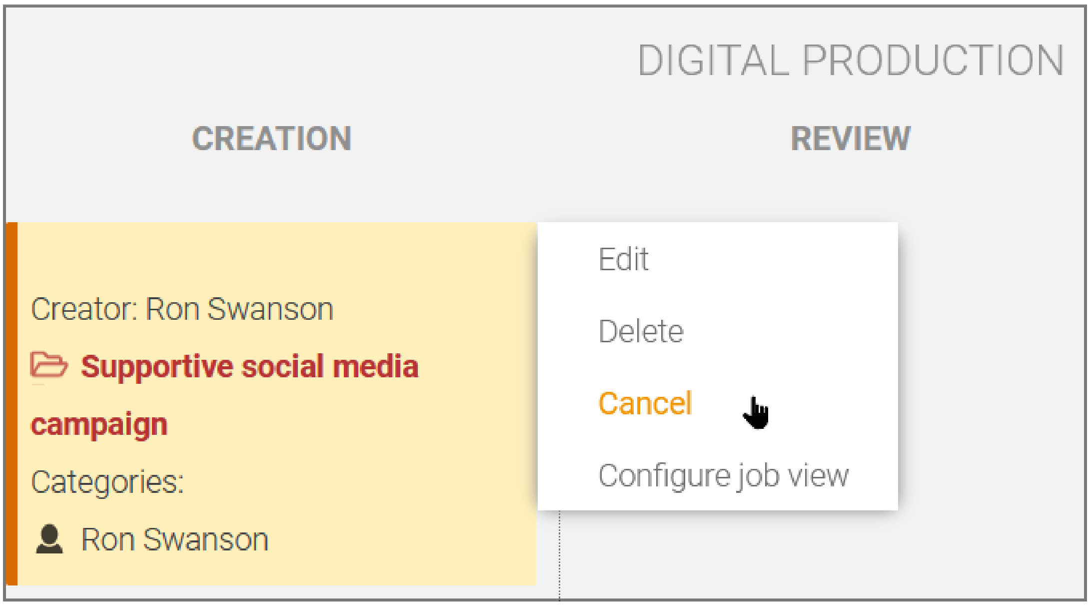
   This opens the confirmation dialog box.



3. Click on *Confirm*.

You have canceled the selection and the job disappears from the current view. All participants are notified by the system. You have canceled the job.

Optional: Move the mouse pointer over the Kanban card. A small gear wheel appears in the upper right-hand corner. In the context menu of the Kanban card, select the menu command *Cancel*.



> Caution
>
> If you select *Cancel* in the context menu under the gearwheel on a Kanban card, there is no confirmation prompt and the job is immediately canceled and removed from the Kanban view.

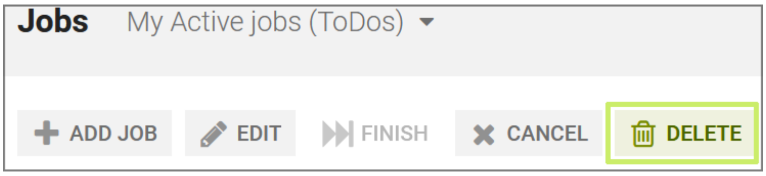
5.3 Deleting a job

Ron sees that he has a job in progress that he started a long time ago but never finished. He knows he doesn't need this job anymore. He doesn't want to simply cancel it, but rather remove it for everyone if possible.

The job or process should not be canceled, but just removed from processing and deleted due to a detected error. The *Delete* function is available in the button bar of the job overview under the trash icon or in the open data sheet under the … menu.

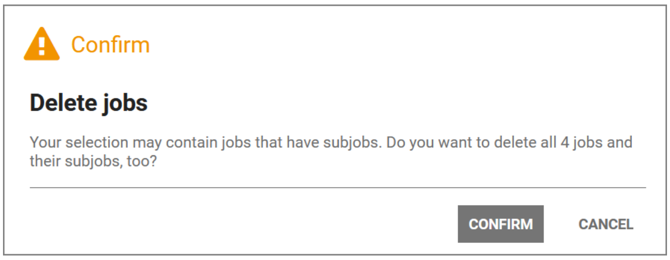
Prerequisite If the Delete button is missing in the job overview, you cannot use this function.

Deleting in the job overview



1. Open the job overview > *Jobs* > *Search* and filter by the job.
    - One job: Click on the line of the job that you want to delete.
    - Multiple jobs: Use CTRL-click or CMD-click to make individual selections or SHIFT-click on start and end element for the entire range.
2. In the button bar, click on *Delete*.

    This opens the confirmation dialog box.

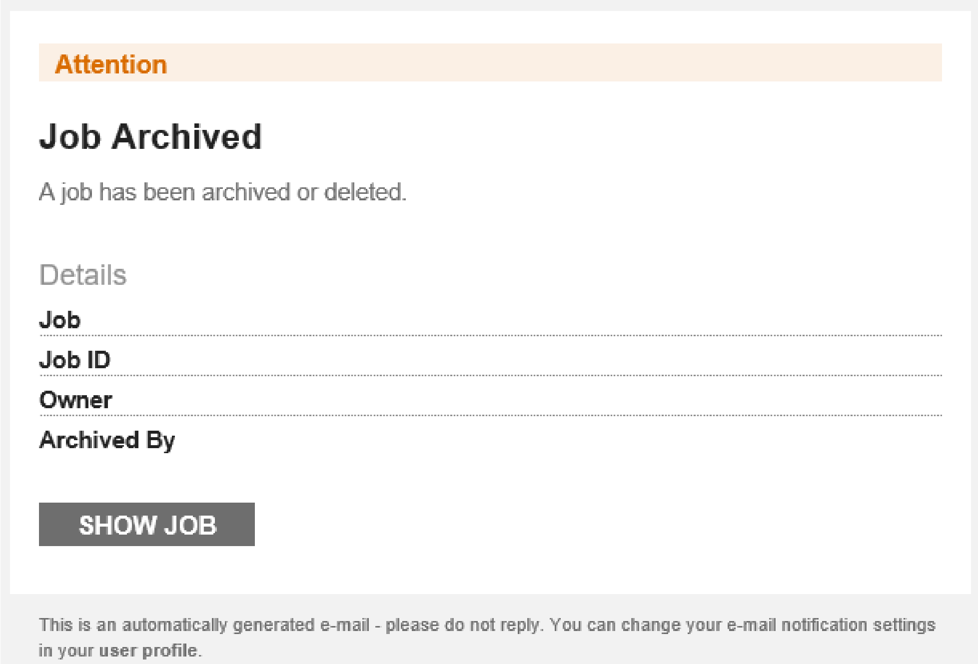
    

3. Click on *Confirm*.

    The selected jobs/processes or sub-jobs are deleted.

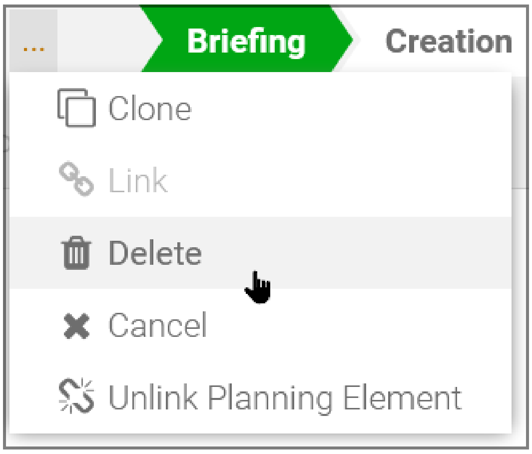
    Optional: You can use a filter operation to delete all filtered jobs/processes at once by calling the menu command *Delete jobs* in the *Whole filter* menu and confirming the dialog.

You have deleted the job/process. The job disappears from the current filter list and the job status is set to *Deleted*. All participants are notified by the system. If your user role allows it, you can call up deleted jobs/processes via the *Deleted Jobs* filter.



Deleting in a data sheet

1. Open the job.
2. In the open data sheet of a job/process, open the … menu and select the menu item *Delete*.



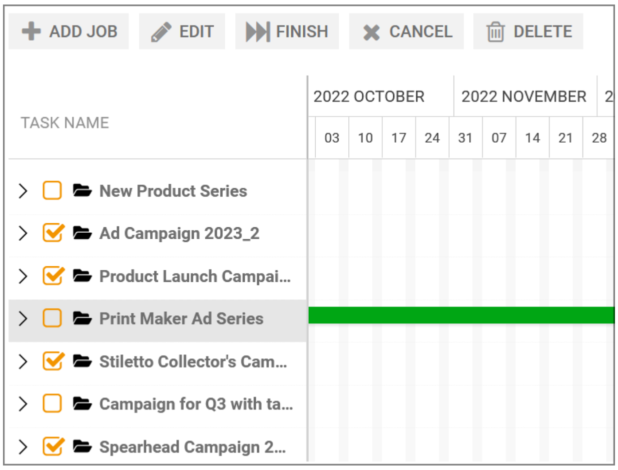
   This opens the confirmation dialog box.

3. Click on *Confirm*.

You have deleted the open job/process and the job status is set to *deleted*. All participants are notified by the system. If your user role allows it, you can call up deleted jobs/processes via the *Deleted Jobs* filter.

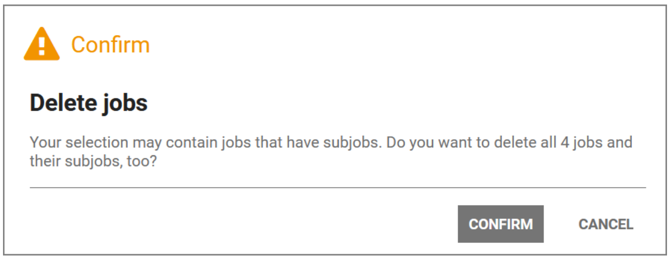
Deleting in a Gantt chart

1. On the left-hand side under *Task Name*, activate the checkboxes of the jobs/processes to be deleted.



2. In the button bar, click on *Delete*.

   This opens the confirmation dialog box.



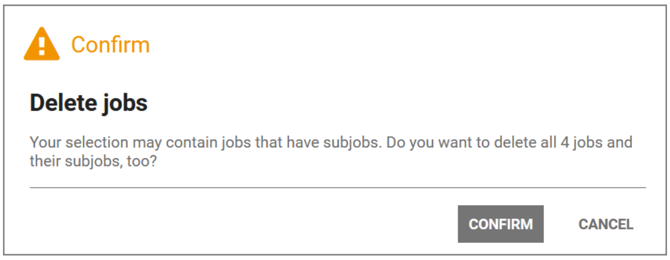
3. Click on *Confirm* to delete the selected jobs/processes or sub-jobs.

You have deleted one or multiple jobs/processes and the job status is set to *deleted*. All participants are notified by the system. If your user role allows it, you can call up deleted jobs/processes via the *Deleted Jobs* filter.

Deleting in the Kanban view

1. Click on a free area of the Kanban card to select it.
   - One job: Click on the card of the job that you want to delete.
   - Multiple jobs: Use CTRL-click or CMD-click to make individual selections or SHIFT-click on start and end element for the entire range.
2. In the toolbar above the Kanban overview, click on *Delete*.

This opens the confirmation dialog box.

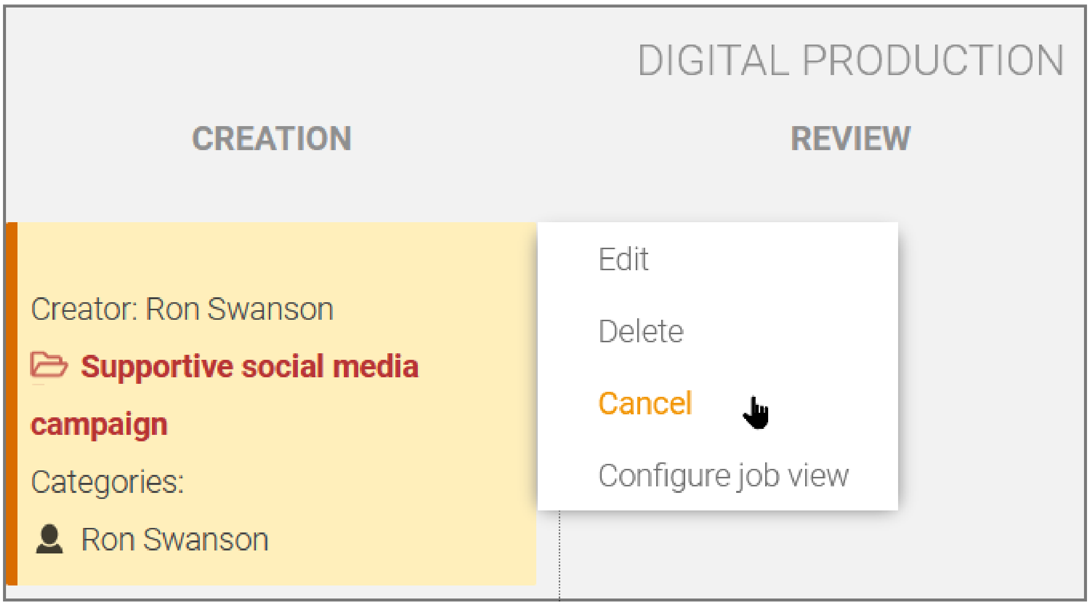


3. Click on *Confirm*.

   This deletes the selected jobs or sub-jobs.

You have deleted the selection and the job status is set to *Deleted*. All participants are notified by the system.

Optional: Move the mouse pointer over the Kanban card. A small gear wheel appears in the upper right-hand corner. In the context menu of the Kanban card, select the menu command *Cancel*.



Caution

If you select *Delete* in the context menu under the gearwheel on a Kanban card, there is no confirmation prompt and the job is immediately removed from the Kanban view.

You have deleted the selection and the job status is set to *deleted*. All participants are notified by the system. If your user role allows it, you can call up deleted jobs/processes via the *Deleted Jobs* filter.

5.4 Reactivating jobs

As a campaign manager, Ron had to quit a job in the Job Manager a while ago because the campaign was put on hold because it was exceeding the budget. Now, months later, the campaign is to be continued and the job completed. Ron uses the *My Canceled Jobs* filter to search for the job. He wants to reactivate it so that it is once again available for everyone to edit. He can use the same procedure to reactivate completed jobs if he is planning a new campaign with the same parameters. Reactivating jobs instead of reconfiguring them saves him time and effort.

Prerequisite Your user role in the Job Manager module must have the appropriate rights. Otherwise, the buttons for reactivating or restoring canceled and deleted jobs will not be available on the data sheet.

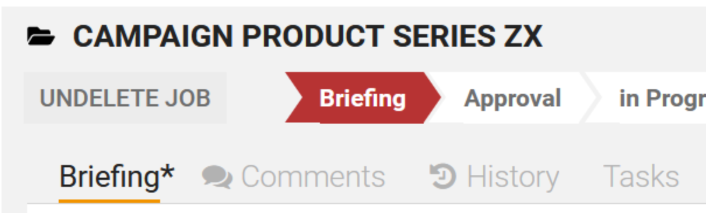
How and in which workflow step can I reactivate?

Reactivation makes it possible to resume jobs. Reactivated jobs can be continued or restarted depending on how they were finished. The data sheet of a reactivated canceled or finished job is reopened in the first workflow step. Jobs that have already been deleted are restored in the last active workflow step. If you wish to resume work on a job or process that has been finished or canceled, this only requires a few mouse clicks. This also applies to classic job types that have been deleted. However, deleted processes cannot be reactivated.

Jobs

You can access the function at the top left of the data sheet after clicking on the job to be reactivated and pressing *Edit* to open it.

1. Search under canceled, finished, or completed jobs.
2. Select and open the data sheet of the job/process.
3. Click on *Reactivate Job* for jobs that have been finished or canceled, or *Restore Job* for jobs that have been deleted.



4. Make the necessary entries to be able to work with this job/process again.

The job appears again in the job overview under the jobs in which you are participating.

Processes

> Note
>
> In the case of canceled and finished BPMN jobs, the button is not displayed if the underlying BPMN type has already been deleted by the administrator. Reactivation is then strictly excluded.
>
> Deleted processes can never be reactivated, even if they were previously properly finished or canceled.

Prerequisite In the process type, the administrator has defined the workflow steps for which the job can be reactivated.

If multiple reactivation options are available, a selection dialog box is displayed instead of the simple confirmation dialog box. You can then select from a list of possible workflow steps to reactivate the process at the selected restore point.

Screenshot with four workflow steps as restore points:

1. Open a finished or canceled process.
2. On the top left, click on the button *De-archive job*.

   A *Confirm* dialog box opens with a list of possible restore points.
3. Click on the respective list item to select the corresponding workflow at this point for reactivation.
4. Click on *Confirm*.

This closes the data sheet and the reactivated process appears again in the job overview under the jobs in which you are participating. After opening, the process can be edited again from the reactivated workflow step.

You have reactivated a finished or canceled process in the selected workflow step for editing.

6

Further functions

In addition to the frequently used functions that you learned how to use above, there are also a number of functions that are only used in special situations or by certain organizations.

- *XML-Export* on the facing page

6.1 XML-Export

The export function is intended for power users and administrators. Ron must have this function enabled in his user role first if he wants to use it.

Prerequisite The user role must have the appropriate permission to initiate exports in the Job Manager module. For users without this right, the Export button and the Export page are hidden.

The export function allows Ron to export all jobs/processes matching a filter to a file at one time. However, he must bear in mind that jobs/processes that do not appear in the list will also be exported if they match the selected filter and search criteria.

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

The system does not export metadata for the type definition. Instead, it only exports a reference to the relevant type used.

If you trigger multiple exports, the export jobs are added to a queue. You can view the queue in the job overview via *Exports* and cancel requested exports or exports in progress if necessary. Completed exports are available for download.

To exit the export page, click on *Search* in the title bar. This will take you back to the job overview.

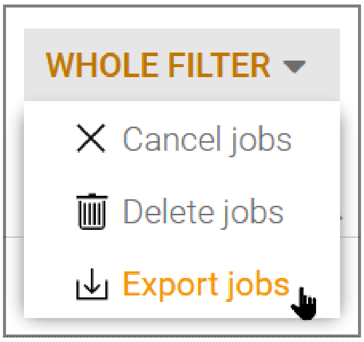
> Note
>
> The *Import* function and the associated right, which were still available in previous versions, have been removed from the user interface and the system.

Associated tasks

- *Exporting Jobs* on the next page
- *Downloading an export* on the next page
- *Canceling an export* on page 179
- *Deleting an export* on page 179

6.1.1 Exporting Jobs

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

   An info message appears.
3. Confirm the message by pressing *OK*.

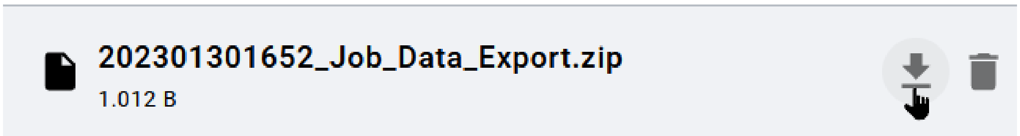
The export is performed in the background. When the export is finished, you will be notified by e-mail and you can then download it from the *Exports* subpage of the Job Manager overview page.

6.1.2 Downloading an export

To download a completed export in the system:

1. On the Job Manager overview page, navigate to the *Exports* subpage.
2. Hover the mouse pointer over the export in the *Available for download* area.

   A download icon will appear to the left of the trash icon.

3. Click on the download icon.

   The export will be saved as a ZIP archive in the download folder of your web browser.

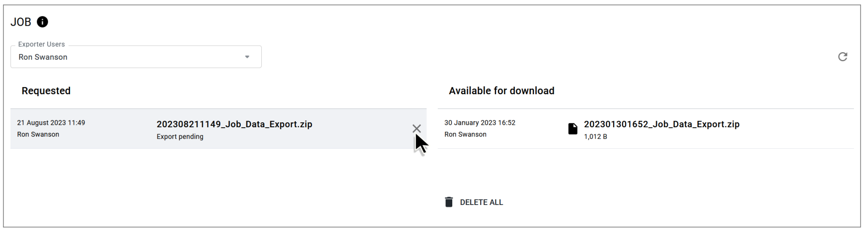
You have downloaded the export.

6.1.3 Canceling an export

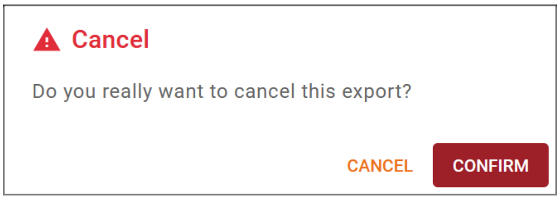
To cancel a requested export:

1. On the Job Manager overview page, navigate to the subpage *Exports*.
2. Search for the export in the *Requested* area and move the mouse pointer over it.

   An ✕ icon becomes visible.
3. To cancel, click on ✕ after the export in question.

   The *Cancel* dialog box opens.

4. Click on *Confirm*.

You have canceled the export.

> **Note**
>
> Please note that the screenshot above shows the export area for users that are allowed to view the exports of all users. If you only have access to your own exports, the user name and the filter option will not be displayed above the *Requested* area.

6.1.4 Deleting an export

To delete a completed export in the system:

1. On the Job Manager overview page, navigate to the *Exports* subpage.
2. Hover the mouse pointer over the export in the *Available for download* area.

   A trash icon will appear next to the download icon.

3. Click on the trash icon.

   The *Delete* dialog box opens.

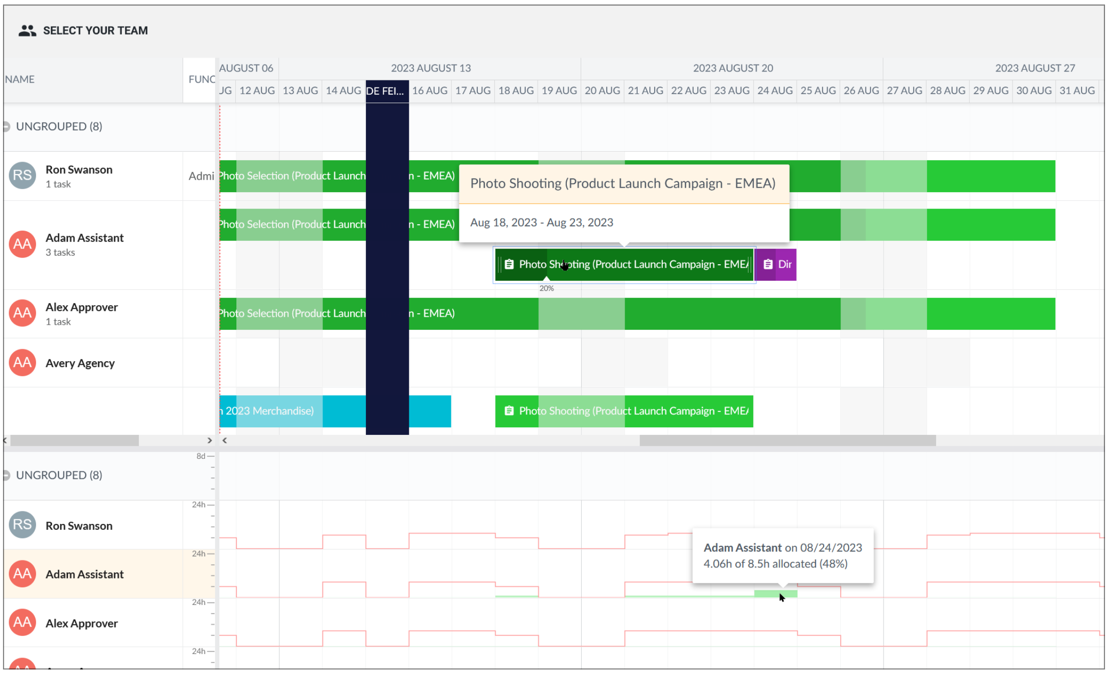
4. Click on *Confirm*.

You have deleted the export.

7

Resource Management

Resource Management is a useful tool for marketing managers. It provides a real-time overview of the ongoing work of a team's users. It helps to track the work-load of employees and optimally distribute workflows among team resources. When Resource Management is activated, users in the Job Manager can access the entry *Resources* in the module navigation. They no longer need to leave the resource view to assign and adjust start and end times and assignees for work-flow steps and tasks.



Associated topics

- *Submodule: Resources* on the facing page
- *Task Manager* on page 71

7.1 Submodule: Resources

Alice is a project manager and manages the jobs and tasks for her team. Resource Management gives her another way to get an overview of the current status and progress of the individual jobs and tasks as well as the availability and workload of the individual team members.

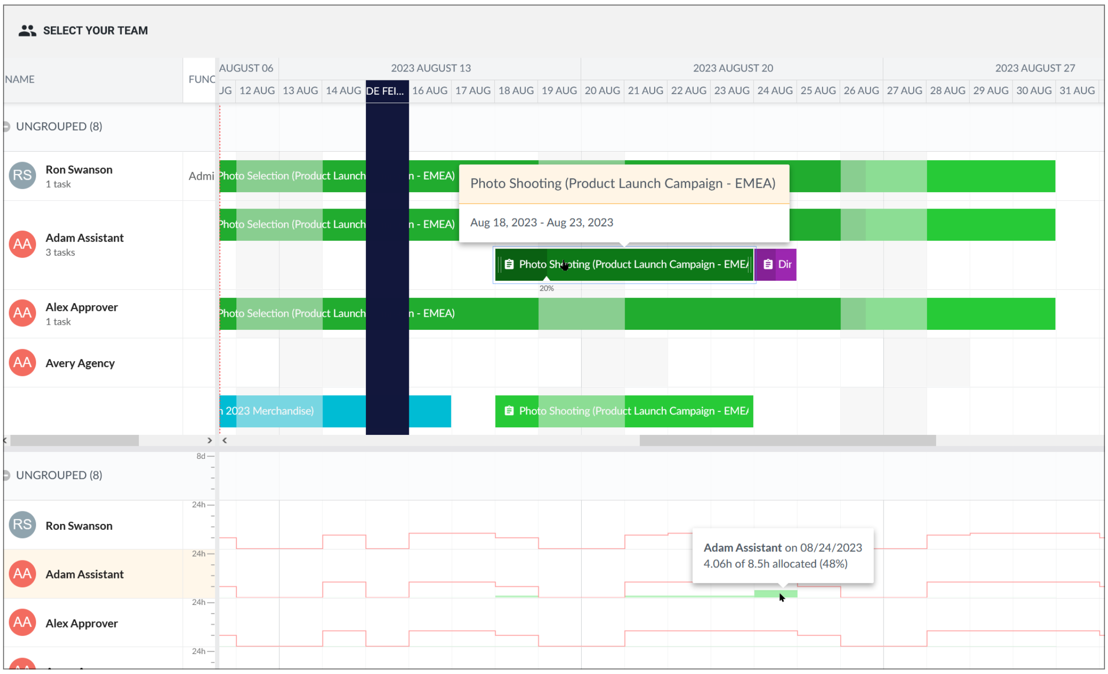
This sub-module of Job Manager allows her to assign unassigned tasks and workflow steps, adjust or transfer existing tasks and workflow steps, and set or change the due date or duration of tasks. This can be done without having to open the associated job data sheets. Alice and her team can view the status and progress of each task and workflow step in the form of bar charts in a calendar view. Alice can use this to better plan and manage projects, optimize work distribution, and ensure transparent communication with her team and stakeholders.

Prerequisite Resource Management must first be enabled by an administrator before it can be used.

For users with access to the *Job Manager* module, the entry *Resources* in the module navigation can be directly accessed as a separate component of the module in the main navigation under the entry *Resources*.

Screen layout and basics

For the defined team, all assigned tasks and workflow steps are displayed and distributed over the days the user is working. A vertical dividing line marks the beginning/end of a working week. You can use the three zoom buttons to enlarge or reduce the view step by step (+/-) or fit it to the window width with the  button. The top half of the resource view contains the team members on the left and then a calendar timeline on the right, including assigned tasks, workflow steps, and calendar events. The length of the bars corresponds to the scheduled duration in days.



Feature overview in video:

Weekends and days off without working hours have a light gray background.

The upper area shows upcoming absences, ongoing tasks, and workflow steps per user line by line. Below the gray separator bar, the respective workload of the users is displayed. You can move the horizontal and vertical separator bars. When you position the mouse exactly over the separator, the mouse pointer changes into a double arrow. Drag the mouse up or down to adjust the split view as desired.

The color bars are labeled in front of the actual name with the same icons as the filter buttons for task or workflow step. The bars representing the tasks are labeled with name of the task (name of the job/process) for better orientation.

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

- The vertical red dotted line shows the current date and, depending on the zoom level, a simple clock indicating how much time has already elapsed on the current date.
- For processes, the start and end date should already be entered by the administrator in the workflow modeler in the *User Task* properties under Standard Runtime in Days.
- The duration of a task or a job corresponds to the difference between the start and end date.

- The work time for jobs and processes is defined in Resource Management. For tasks, the work time required can be defined both in Resource Management or on the data sheet in the Task Manager Variable.
- For jobs with classic workflows, all workflow steps are displayed in the calendar view. For processes with BPMN workflows, you only see the active workflow step here. This is due to the fact that, with branching workflows, it is almost impossible to predict whether all workflow steps will be executed at the end. Classic workflows that do not represent the active workflow step, but are only planned, are shown shaded.

Associated tasks

- *Selecting a team* below
- *Assigning tasks* on page 187
- *Assigning a workflow step* on page 191
- *Adjusting the start and end date* on page 200
- *Absences* on page 196
- *Company vacations and public holidays* on page 195
- *Working hours and user workload* on page 197
- *Recording the planned work time* on page 198

7.1.1 Selecting a team

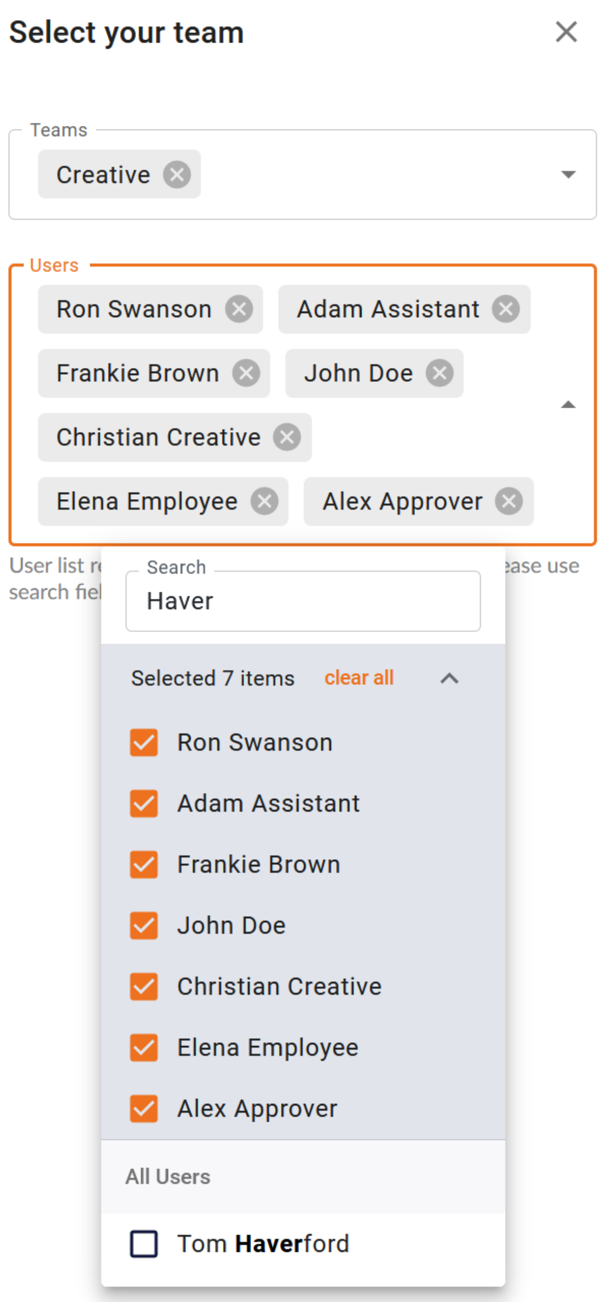
Alice wants to effectively manage the workload of her marketing team. To create the team, she needs the function *Select your team*. This allows her to create an individual combination of users in order to compare their workloads and optimize them as required.

You can select different teams (user groups) that have been predefined by the administrator from a drop-down menu or select the users individually to display them in the resource overview.

1. Open Resource Management via > *Jobs* > *Resources*.

   When you first open it, the view is empty because there is no team yet.
2. Click on the *Select your team* button to assemble your team.

   The selection dialog box appears from the right.
3. Select a team or multiple teams or add individual users.



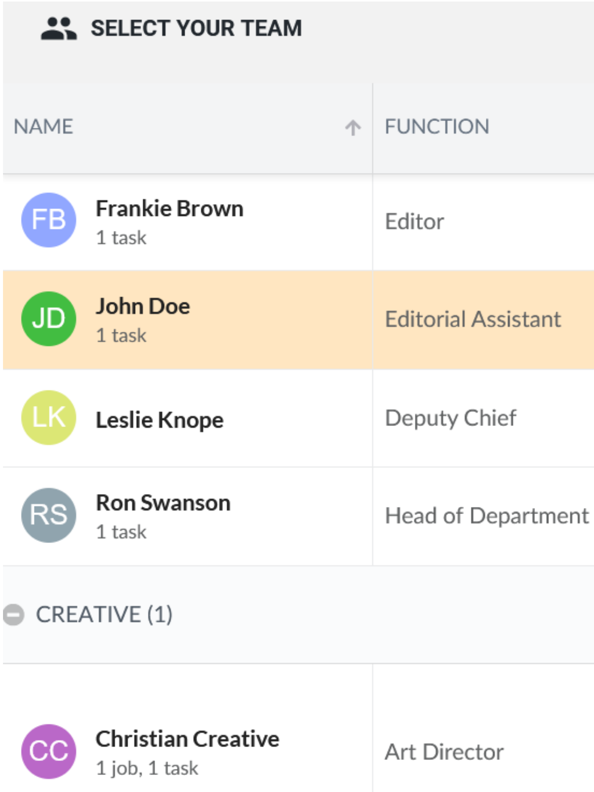
4. Press *Save*.

   The users and user groups you added appear in the resource overview on the left side. Multiple teams can be displayed. The team members are displayed grouped into teams.

You have created your team. This view of your team is saved in the system and will be used the next time you open the Resource Manager.

You can use the following options to complete or customize the view:

1. Optional: Double-click in the initially empty cells in the *Function* column to enter the job title / function of the team members within the organization.



2. Optional: Press -/+ in front of the team name to selectively expand and collapse the view of each team.

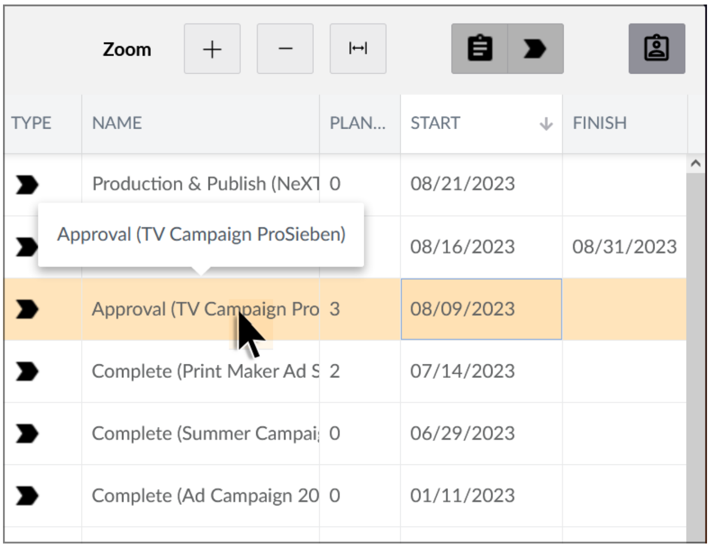
7.1.2 Assigning tasks

Tasks that have not been pre-assigned can be conveniently assigned in Resource Management.

> **Note**
>
> Please note that tasks that have been pre-assigned to assignees remain in the list of unassigned tasks until a start and end date have also been entered. Only when all fields are filled in does the entry disappear. It then appears as a color bar in the calendar view.

Filtering by tasks

Press the button on the Resource Management page to display and manage a list of all unassigned workflow steps and tasks on the side. The unassigned tasks and steps are listed there with their respective icons. Use the (tasks) and (workflow steps) buttons to filter the display. After loading the Resource Management screen, both filters are initially active.



1. Click on in the upper right-hand corner to show the sidebar.
2. Optional: The individual columns can be sorted in ascending and descending order by clicking on the column header, and you can also adjust the column width.
3. For a better overview, click on to hide the workflows.

Then only the unassigned tasks will be shown in the list. Workflow steps that have already been assigned are also hidden in the calendar view.

Assigning by drag-and-drop

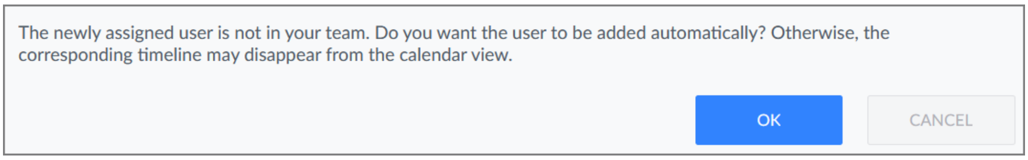
> **Note**
>
> If a pre-assignment has been carried out, you cannot drop a task on any user you want. The drag-and-drop item turns red if it is not allowed to be placed and is green if the assignment is allowed.

1. Drag a task over a user's timeline and release it over the desired start date.

The task is then assigned and appears on the timeline. The assignees will receive a notification in the system or an e-mail with a link to the job to which they have been added with the task as a participant.

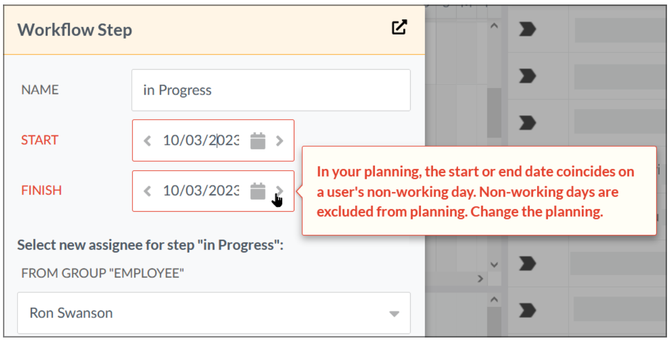
Assigning by direct input

You can specify the name, resources (assignees), start and end date, and the scheduled duration, and add users from the assigned user groups.

1. Double-click on a list entry in the list of unassigned tasks.
2. In the *Resources* field, add one or more assignees. To do this, either type the first letters of a user's name to select from the list of suggestions or first display the entire list of users by clicking on ▾ to select a user.
3. Confirm with *OK* if the user is not yet on your team.
4. 

5. Click on the calendar icon in the *Start* or *Complete* field to select a date using the date picker.

   When entering or changing the start and end dates of tasks, you will be directly notified of an absence conflict by a red border.

6. Optional: Use the left and right arrows to move the entry forward or back by one day.
7. Click on *Save*.

The task is then assigned and appears on the timeline. The assignees will receive a notification in the system or an e-mail with a link to the job to which they have been added with the task as a participant.

1. Optional: To adjust an already assigned task, double-click on this task in the sidebar or on the color bar in the calendar view.
2. Edit the fields to make adjustments to the scheduled duration, to reassign the task, or to split the task among multiple assignees.

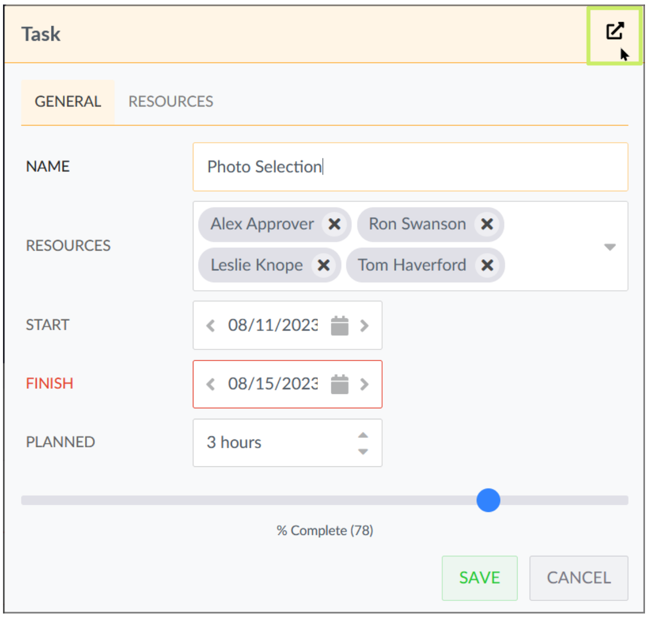
You have adjusted the task.

Switching to the job data sheet

You can switch directly to the job data sheet from the task assignment dialog box at any time.

1. Open the workflow step by double-clicking on the bar in the timeline.
2. Optional: Open the unassigned workflow step in the list on the right.

   Use the icon at the top right to open the job data sheet.

3. Switch to the tab with the *Tasks*.

You have left Resource Management and are working directly on the data sheet.

Adjusting a task

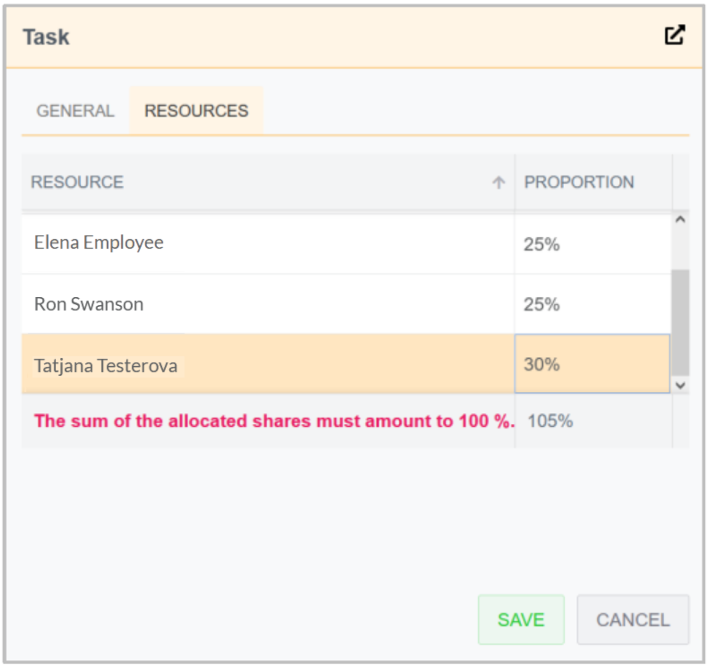
1. Optional: Double-click on a task in the sidebar or on the color bar in the calendar view.
2. Edit the fields to make adjustments to the scheduled duration, to reassign the task, or to split the task among multiple assignees.

You have adjusted the task.

Allocating resources

If you want to assign a task to multiple users, the distribution of resources among the users is identical by default. However, you can also adjust the distribution individually.

1. Double-click on a task that is assigned to multiple users to open the dialog box for allocation.
2. Switch to the *Resources* tab to make adjustments to the allocation.



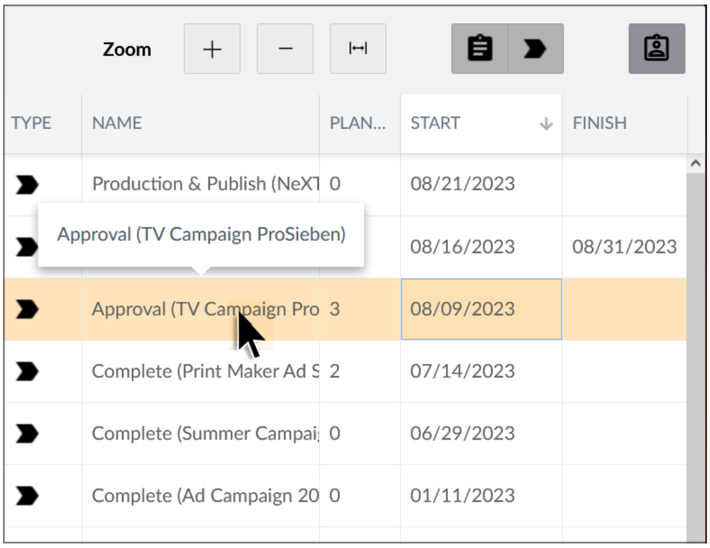
For example, if user A is to take on 20% of the task and user B 35%, user C will be left with 45%. This is because the percentages must always add up to 100%, otherwise the task allocation cannot be saved.

7.1.3 Assigning a workflow step

Workflow steps that have not been pre-assigned can be conveniently assigned in Resource Management.

Filtering by workflow steps

Press the button on the Resource Management page to display and manage a list of all unassigned workflow steps and tasks on the side. The unassigned tasks and steps are listed there with their respective icons. Use the (tasks) and (workflow steps) buttons to filter the display. After loading the page, both filters are initially active.



Click on the icon (tasks). Then only the unassigned workflow steps will be shown in the list. Tasks that have already been assigned are also hidden in the calendar view.

Assigning by drag-and-drop

1. Drag a workflow step over a user's timeline in Resource Management and release the step over the desired start date.

   Note: Since workflow steps in the job type are usually permanently assigned to a user group, the assignment cannot be done arbitrarily.

The workflow step is then assigned and appears on the timeline. The assignee will receive a notification in the system or an e-mail with a direct link to the job.

Assigning by direct input

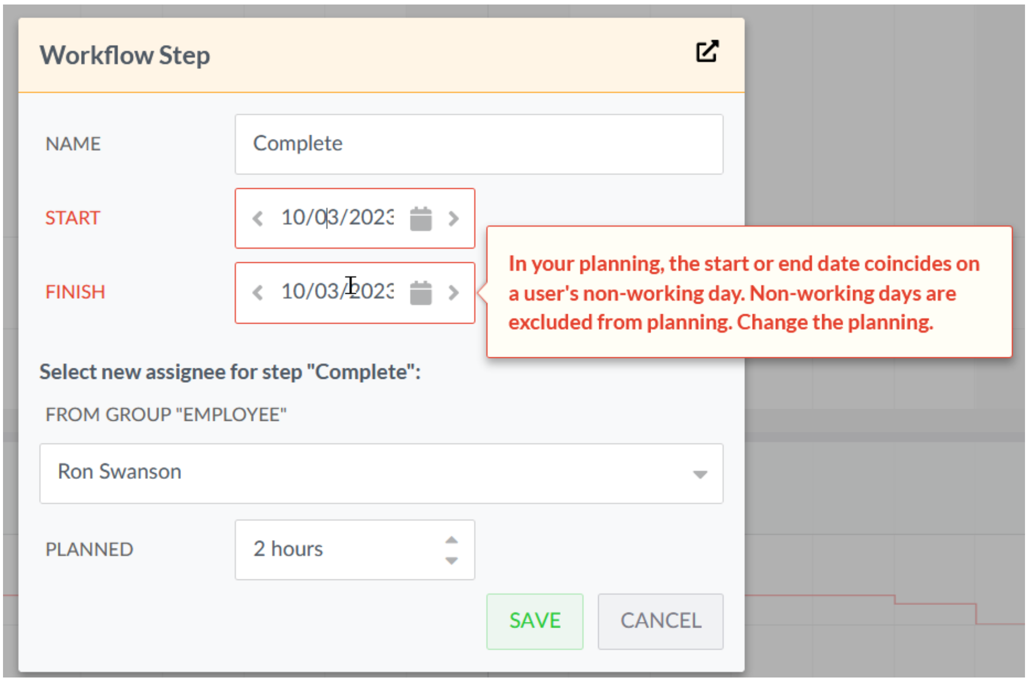
> Note
>
> Unlike tasks, it is not possible to allocate workflow steps to multiple users.

You can set start and end dates and the scheduled duration and add users.

1. In Resource Management, double-click on a workflow step on the right in the list of unassigned workflow steps.
2. In the field *Select new assignee for step*, either type the first letters of a user's name to select from the list of suggestions or first display the entire list of users by clicking on ▾ to select a user.

3. Click on the calendar icon in the *Start* or *Complete* field to select a date using the date picker.

   When entering or changing the start and end dates of a workflow step, you will be directly notified of an absence conflict.

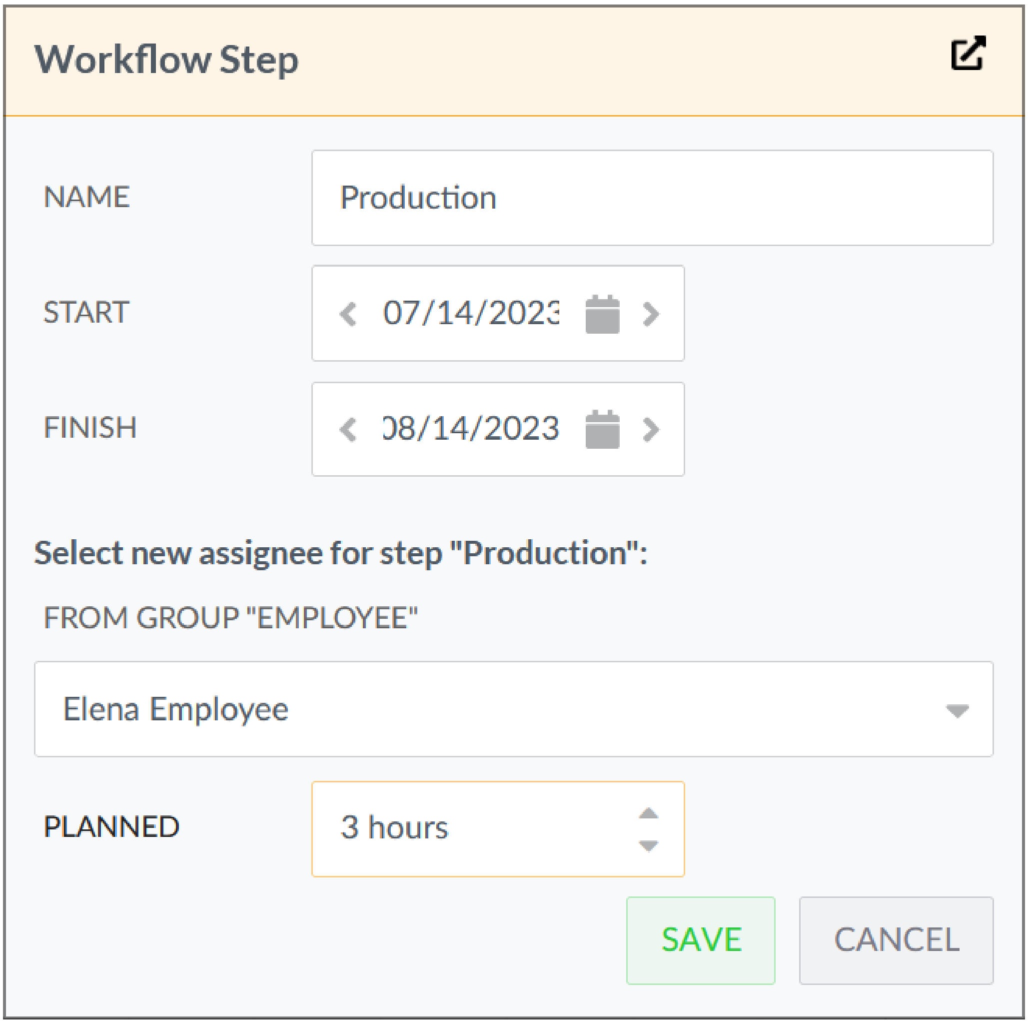
4. Optional: Use the left and right arrows to move the entry forward or back by one day.
5. Click on *Save*.

The workflow step is then assigned and appears on the timeline. The assignee will receive a notification in the system or an e-mail with a direct link to the job.

Adjusting a workflow step

Prerequisite As the creator of a job, you can still subsequently adjust the information in the fields Start, Complete, and Planned. Other users must have the appropriate right in their user role.

1. Open the workflow step by double-clicking on the color bar in Resource Management to make adjustments.



2. Revise the content of the fields *Select new assignee for step*, *Start*, *Complete*, and *Planned* as desired.
3. Click on *Save*.

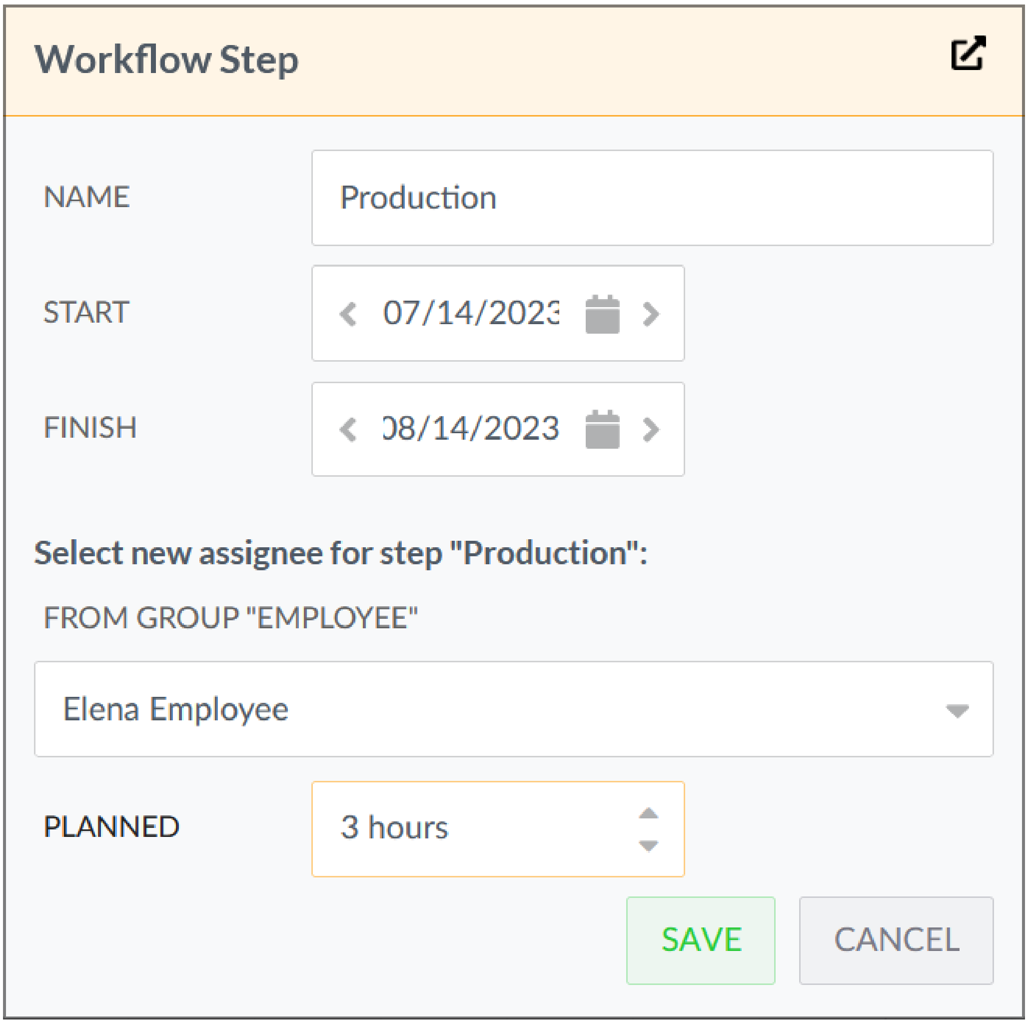
The changes are accepted.

Switching to the job data sheet

You can switch directly from the dialog box in Resource Management for assigning a workflow step to the data sheet of the job at any time.

1. Open the workflow step by double-clicking on the bar in the timeline.
2. Optional: Open the unassigned workflow step in the list on the right.

Use the icon at the top right to open the job data sheet.



You have left Resource Management and are working directly on the data sheet.

7.1.4 Company vacations and public holidays

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

Proceed as follows to view the calendar with company vacations and public holidays.

1. Click on your initials in the upper right-hand corner and navigate to*User settings> Absences*.

   Calendars of user groups can be displayed with your individual absences (vacations) superimposed on the *Absences* page in the user settings.

2. Click on *Select Calendar* in the upper right-hand menu to select one or more calendars to display.

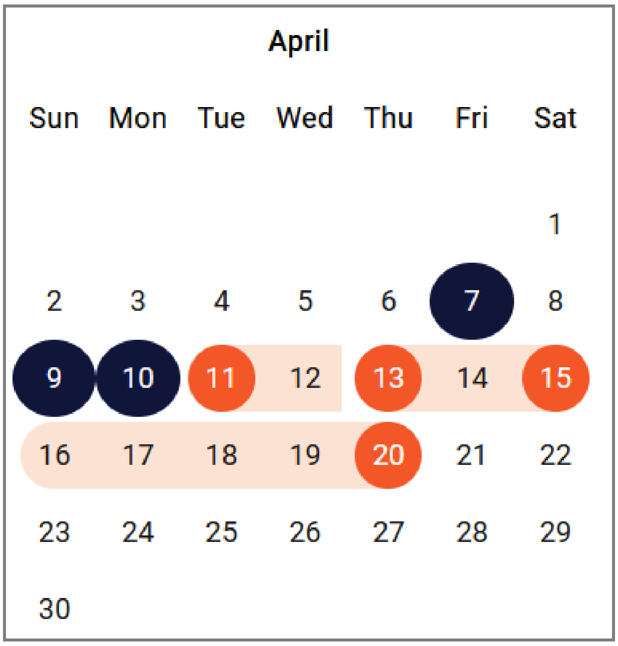
Days with stored company vacations and public holidays are automatically blocked in Resource Management for users of the relevant user group and are not available for editing tasks and workflow steps.

7.1.5 Absences

Users who are not available cannot be assigned a task.

In order for the assignment process to work properly, each team member to whom tasks are to be assigned must go to the calendar under > *Users* > *User Settings* > *Absences* and mark the days and time periods when they are not available to work.

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



As a rule, it is not only vacation time but also training days or events that should be taken into account in Resource Management.

APPLICATION EXAMPLE

The following screen lists a team of five users.

Adam Assistant, Elena Employee, and Frankie Brown have not entered any personal working hours and work during the usual working hours. The working hours of Jason Appleby and Ron Swanson have been customized using personal settings. For example, Jason works on Saturdays, but not on Mondays. Ron works fewer hours on Fridays and has entered an absence starting on April 1st.

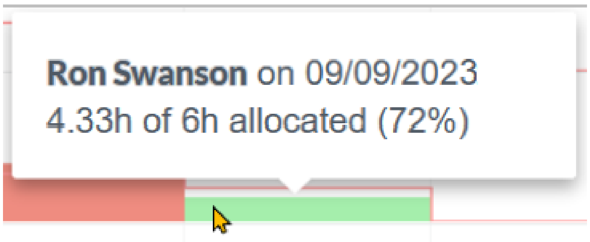
7.1.6 Working hours and user workload

Resource Management provides an overview of the workload of users working on tasks and jobs/processes and enables a user-friendly optimization of work distribution. The calendar view is divided into two parts. At the top is the timeline with workflow steps and tasks. The bottom half of the screen shows the workload of the team members in terms of time. In order to calculate the workload of the users, the working hours for which the users are available must first be recorded.

Each user can manage their work and absence times individually in the user settings. You can find out exactly how to do this in the Basic User Guide. If working hours are stored for both the company and a user, the working hours of the users are taken into account for the calculation of the workload. For newly created users or if a user does not enter individual working hours, therefore, the working hours of the company are used.

The lower half of the view shows the daily available working hours with the aid of a red line. This line can vary, for example, if someone works only half the day on some days.

A color bar indicates how many working hours are scheduled for the user. As long as the daily maximum working hours are not exceeded, the bar is light green. The user still has available capacity. If the daily working hours are exceeded, the bar is light red. You can't reassign anything to this user for that day until you reallocate resources and relieve that user of less urgent tasks, for example.



Place the mouse pointer in the line of a team member over the color bar of a tag in the workload diagram. A tooltip appears showing the user's workload and availability for that day.

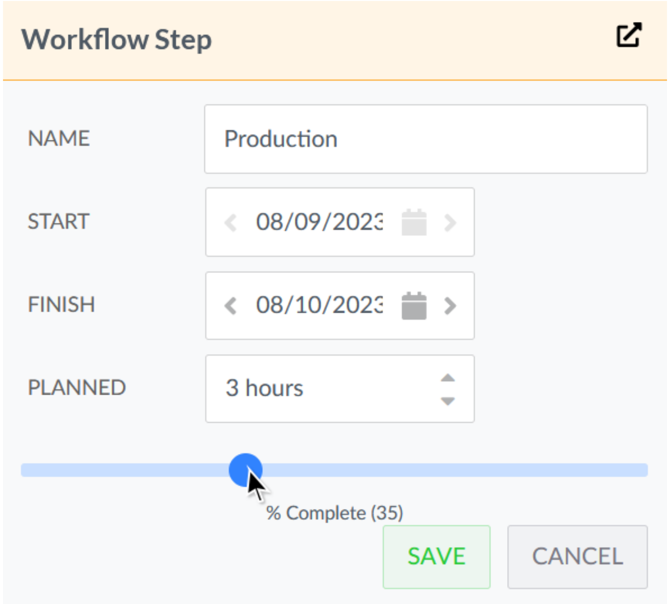
7.1.7 Recording the planned work time

You can enter and maintain the planned work time in hours. Number entries are accepted in both German and international decimal format, such as *2,25* or *2.25*. Internally, the software uses the period as the decimal separator, so an entry with a comma will be converted to this format.

To adjust the planned work time directly in Resource Management:

1. Open the dialog box by double-clicking on the entry in the list of unassigned tasks or workflow steps.
2. Optional: To open the task or workflow step, double-click on the bar chart in the calendar view.
3. For each task, enter your new estimate for the required work time in the *Planned* field.
4. Choose *Save*.

   As an assignee, you may not be allowed to change anything in the *Planned* field. However, you are expected to manually adjust the progress. This way, the manager can determine if you are making good progress with your work.



5. Optional: Assignees can use the blue slider to indicate what percentage of the task / an ongoing workflow step has already been completed. This progress is then displayed in color in the bar chart and the exact percentage appears when you hover your mouse over it.

You have changed and saved the work time and the progress.

In the job data sheet

To adjust the planned work time for tasks in the data sheet of the job, proceed as follows:

1. Open the job in the overview or click on the icon in the open task in the Resource Manager.
2. Switch to the *Tasks* tab or look for the field variable *Task Planner* on another tab.

   You will see a table of the individual tasks with the planned times.
3. For each task, enter your adjusted work time estimate in the *Planned* field.
4. Click on *Update*.

You have changed and saved the work time for the task.

Topics

- *Task Manager* on page 71
- *Changing the task status* on page 146
- *Recording the work time required* on page 149

7.1.8 Adjusting the start and end date

> **Note**
>
> If the rights check shows that you do not have sufficient rights, the drag-and-drop action is canceled or the details dialog box is closed again.

Rescheduling by drag-and-drop

An intuitive way to change the duration is to drag the left or right edge of the color bar with the mouse.

1. Click and hold the color bar of the task or workflow step to drag and drop it to a new start date.
2. Release it over the desired new start date.

   The scheduled duration remains unchanged.
3. The mouse pointer changes its appearance to a double arrow ⇔ and the bar is superimposed with a drag icon at the beginning or end.
4. Click and hold down the left mouse button and now drag the end of the bar left or right to the desired date.

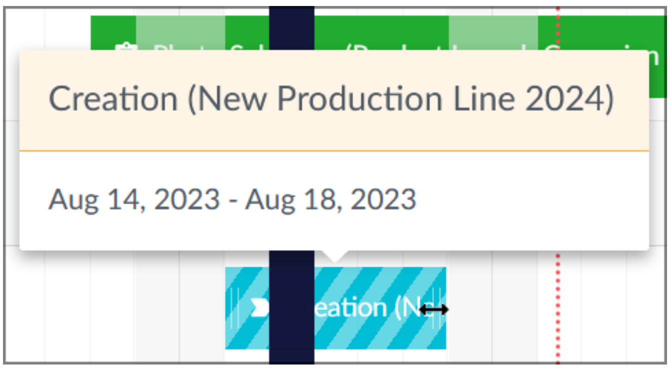
You have readjusted the duration.

Adjusting the start, end, and duration interactively

You can use the mouse to change the start and end of a task or workflow step.

1. Navigate the mouse pointer over the start or end of the color bar to make adjustments.

   The mouse pointer changes its appearance to a double arrow ⇔ and a pop-up displays the task or workflow step information.

2. Press and drag in one direction.

a. Drag to the left to move the start date forward to extend the duration of the task.

b. Drag to the right to move the end date forward to extend the duration of the task.

The changes are accepted.

Note

Only for jobs with classic workflows and for tasks can you change the start and end dates by dragging with the mouse. With processes, only the end can be adjusted. Therefore, no drag icon appears at the start of the workflow step.