Marketing Data Hub

User Manual

Version 7.4

EN

9 September 2022

100800000002

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1 About the Marketing Data Hub

The Marketing Data Hub is the module for planning and managing data objects. As a central database, Data Hub manages all the content required for your communication - in particular, the related advertising texts and graphics material. The customizable workflow steps help you to carry out the work steps efficiently and transparently.

The Marketing Data Hub module allows you to access other modules in the Marketing Efficiency Cloud:

- You can select an asset from the Media Pool for a data object and add it to the data object.
- You can start a review for a stored asset to carry out your discussion processes transparently.
- You can edit a Brand Template Builder document that is stored for the data object and adapt it to your own requirements.

1.1 Useful information for getting started

Here you can find some tips and information that help you to efficiently carry out tasks related to the Marketing Data Hub.

User categories

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

User	Description
Assignee/Processor	You are the (current) assignee/processor of the data object if you are responsible for the current workflow step.
Creator	You are the creator (owner) of the data object if you have created the data object. The creator can be changed at a later stage.
Participant	You are a participant if you were once the processor of the data object or if you are invited to be a participant in the data object. As a participant, you are not responsible for the current workflow step, but you can follow the progress of the data object. Participants can be added to a discussion.
Anonymous	Anonymous users are any users who are not the creator, assignee/processor, or participant, but who can still access a data object. In general, anonymous users only have read access to variables.

Data objects and sub data objects

A *data object* combines all of the information required to plan and manage a data object (for example, a brochure). You can use *sub data objects* to map the inner structure of a data object. A sub data object can use a different workflow that is independent of the data object. Sub data objects allow you to structure workflows and make dependencies between different workflows recognizable.

Localization

To adjust a data object to the requirements of different local markets, you can create localized data object variants.

Workflows and tasks

Each data object is assigned to one or more *workflows*. A workflow consists of various *workflow steps*, and each workflow step is assigned to a user group. The user group members can be selected as the person responsible for the workflow step. In addition, *tasks* can be added to each workflow step so that typical activities are created automatically when the data object is created.

Data sheet

All of the information about a data object is collected and mapped on a *data sheet*. Various information can be grouped together and displayed clearly on a number of tabs.

> **Note:** After you create a new data object, you must save the data sheet before you can use all of the functions.

Variables

To ensure that all of the necessary information (for campaign planning, for example) can be entered on the data sheet, a large number of *variables* (field functions) are available. The variables are defined and placed on the data sheet in the type configuration.

2 Overview

When you call up the Marketing Data Hub module, the overview is called up as the start page. Here, data objects are listed clearly. You can display the data objects that are accessible to you by searching or filtering and in different views.

Start

When the overview is called up, your active data objects and tasks are displayed by default. You have the option of displaying the result of your own filter instead. Note as example the chapter 2.3.3.1.

The overview shows the data objects in a table. You also have the possibility to display the data objects in a Gantt chart and a kanban view.

You can find a detailed description of the different views in chapter 2.1.

Filters and searches

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

- *Filters*: You can use filters to restrict the data object overview based on predefined criteria. See chapter 2.2.
- *Search*: You can use a simple search to search for jobs in an existing filter view. For more information, see chapter 2.2.4.
- *Categories*: Instead of the simple search, you can also use categories to search for jobs in an existing filter view. See chapter 2.2.5.
- *Advanced search*: Define complex search requests that you can save and use again as a filter. You can publish the filter and make it accessible to other users. See chapter 2.3.

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.

2.1 Table, Gantt chart, and Kanban view

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

- : Table
- : Gantt chart
- : Kanban view

Table: Quick access and comparison of details

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

If you want to perform an action on multiple data objects, you can select data objects in the table using the following shortcuts:

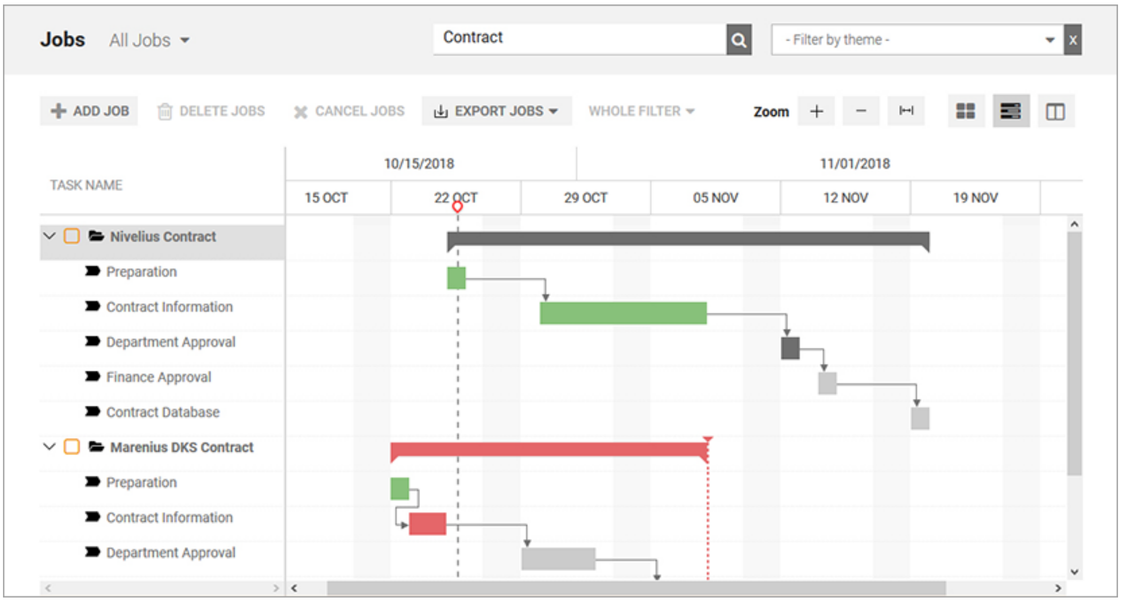
- Click while holding down the CTRL key: Clicked data object is selected.
- SHIFT-click: The first and last clicked data objects and all data objects in between are selected.

For information about changing the table display, see chapter 2.1.1.

Gantt chart: Chronological progress and interdependencies

The Gantt chart lets you record chronological progress and the interdependencies between the workflow steps and tasks. The chart displays each workflow step as a bar; an aggregated bar of all the workflow steps is displayed for the data object. The length of the bars is based on the plan that is 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.
Workflow steps that have not begun are displayed in light gray; finished workflow steps are displayed

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



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

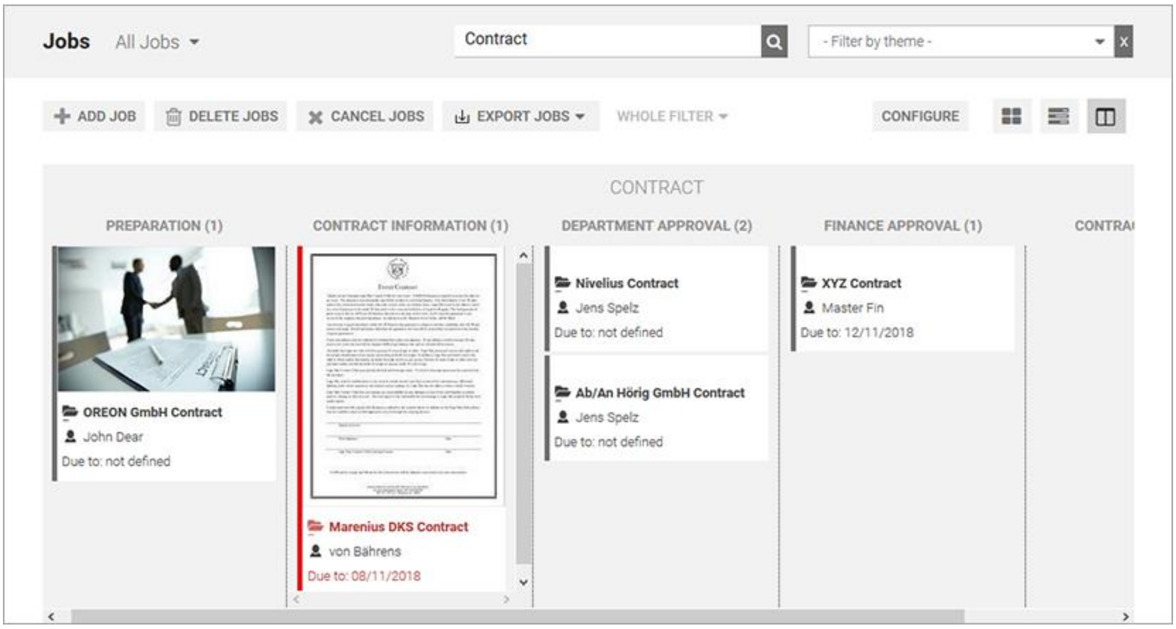
To highlight data objects that need to be processed urgently, you can prioritize the data objects. That is, you can place the data objects with the highest priority at the top of the list in this view using drag and drop. To do so, click the name in the left *Task name* column and hold down the mouse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

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

Kanban view: Pending tasks

The Kanban view lets you quickly see the workflow steps that the data objects are in. Each column corresponds to a workflow step. The data objects can simply be forwarded to the next workflow step using drag and drop. If the current view displays data objects with different workflows, a separate Kanban board is displayed for each workflow and multiple boards are arranged next to one another.

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



You can configure the information displayed for the data objects. See chapter 2.1.2.

2.1.1 Modifying a data object table

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

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

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

Adding Columns

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

The data object overview is reloaded.

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

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

- *System*: You can select from the number of sub- data objects belonging to the data object or the data object name of the parent data object.
- *General*: You can select any of the variables that have been flagged as type-independent.

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

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

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

The new columns are displayed in the data object table.

Removing columns

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

The data object overview is reloaded.

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

A downward-pointing arrow is displayed for the cell.

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

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

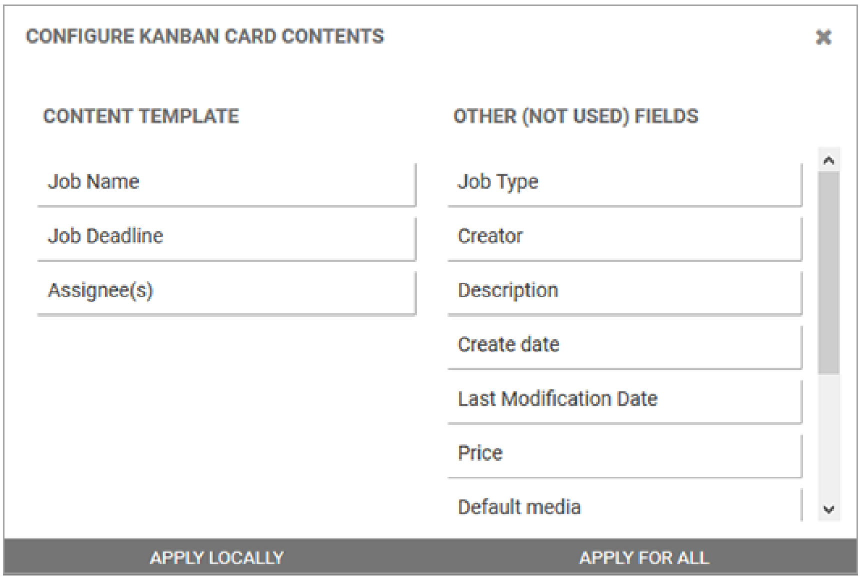
4. Deactivate the checkboxes for the columns that you want to remove.

The columns are removed.

2.1.2 Configuring the Kanban view

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

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



2.2 Filters

In the top left *Data Objects* dropdown list in the Marketing Data Hub, you can use various filters to restrict the data object overview based on predefined criteria:

- *Standard Filter*: The standard filter search criteria (for example, *Data objects I participate in* or *My Finished Data objects*) are predefined automatically and cannot be edited. See chapter 2.2.1.
- *Public Filter*: An advanced search can both be saved and flagged as public. A public filter can be used by all users. See chapter 2.2.2
- *My Filter*: You can save an advanced search and store it as your own filter to use it again. See chapter 2.2.3.

2.2.1 Standard filter

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

Data objects I participate in

You can use this filter to view all of the active data objects (data objects that are not completed or canceled yet) in which you participate.

- Data objects for which you are entered as a participant.
- Data objects for which you are or were the processor of a workflow step.
- Data objects that you created yourself.

My Finished Data objects

This displays data objects that you have created and finished. You finish a data object by clicking the *Finish* button in the last step of the workflow.

My Canceled Data objects

This displays data objects that you have created and canceled. You cancel a data object by clicking the *Cancel* button when forwarding the workflow.

My Data objects

This displays data objects for which you are the current assignee.

All Data objects

This displays all data objects that are not finished or canceled yet. Even data objects in which you are not participating are displayed.

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

All Finished Data objects

This displays a list of all data objects that have been finished.

All Canceled Data objects

This filter lists all data objects that have been canceled.

Deleted Data objects

This displays a list of all data objects that have been deleted.

2.2.2 Public Filter

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

2.2.3 My filters

Under > *My Filters*, you can find all of the advanced searches that you have saved as filters and not published yet.

> **Note:** You can define one of your own filters as your "homepage" of the Marketing Data Hub by activating the *Set as current filter* checkbox when you save an advanced search as a filter.

2.2.3.1 Saving and publishing a search as a filter

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

Prerequisites:

- You have carried out the search request and the search hits are listed in the data object overview.
- You have the right PUBLISH_FILTER.

Step by step:

1. Click *Edit* in the area next to the selection list.

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

2. Click *Search*.

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

3. Enter *Promotions 12345678* in the *Name of the filter* input field.
4. Activate the *Set as public filter* checkbox.

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

5. Choose *Save as filter*.

The filter `Promotions 12345678` is created in the navigation pane to the left under > *Public Filter*.

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

2.2.4 Simple search

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

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

2.2.5 Locales

Data objects can be assigned to locales. To find the data objects of one or more locales in an overview, activate the locales in the selection list.

To reset the filtering by locale, click the **×** in the selection list.

2.2.6 Categories

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

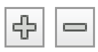
Prerequisites for displaying the selection field:

- Category navigation is activated in the module-specific administration (> *Administration* > *Datasheet Engine* > *Other Settings* > *Job Manager*).
- The *Category* system variable must have been used at least once on a data sheet.

To deselect a selected category, click the **×** next to the category dropdown list.

2.3 Advanced Search

In the advanced search, you can restrict the jobs displayed using the criteria below. You can access the advanced search at the end of the selection list. To learn how to perform an advanced search, see chapter 2.3.1.

Function	Description
Data object type	Select the data object type for which you want to search.
Field name	Select the field (the variable) that is to be searched. **Note:** The selection is dependent on the data object type that is selected.
Restriction	Define the restriction to be used to search for the search criteria. For example, you can specify whether the search term should match the content of the selected field, the search term should simply be included in the field, or whether the search term should be excluded from the field. Criteria for date fields (the creation date or desired delivery date, for example) can be precisely defined.
Search Criterion	Enter the search term that you want to use to search the selected field using the specified restriction.
	You can add additional search criteria (*Plus* sign) or remove search criteria that has already been created (*Minus* sign). You can link multiple search criteria using an AND or OR relation.

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

2.3.1 Carrying out an advanced search

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

Step by step:

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

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

2. Click *Edit*.

The editing dialog box for the advanced search is displayed.

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

This adds an additional line to your search request.

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

This creates an AND link; that is, the system searches for data objects that must relate to both criteria.

9. From the *Data object Type* dropdown list, select the entry *General*.
10. From the *Field name* dropdown list, select the entry *Item number*.
11. From the *Restriction* dropdown list, select the entry *equals*.
12. Enter the item number `12345678` in the input field *Search Criterion*.
13. Click *Search*.

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

14. Choose *Continue without saving*.

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

3 Data sheet

All of the information about a data object is collected and mapped on a *data sheet*. Various information can be grouped together and displayed clearly on a number of tabs.

You open the data sheet by double-clicking the data object in an overview or just select the data object and choose *Edit* in the upper toolbar.

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

- The users who are involved/participating in the data object
- The current data object state (the current workflow step of the data object)
- The creator and the current assignee
- The predefined project workflow for the data object, including any tasks that have been defined
- The relevant information for the data object

Data Object Discussion displays the comments in the main job discussion. You can add a new comment or open a thread to an existing comment by clicking *Reply*. You can also access the main Data Object Discussion on the *Comments* tab. Furthermore, you can add additional discussions on this tab.

> **Note:** The appearance of the data sheet can be defined to suit the purposes of individual customers. Among others, the appearance is determined by the number of tabs created, their names, and the field functions that are used on them. The *Basic Data* and *Comments* tab are created automatically; they can be renamed but *cannot* be removed.

Click ✖ in the top right corner to close the data sheet.

3.1 Variables that are used frequently

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

Variables that are used frequently

Name	Description
Text fields (single or multi-line)	Here, you can enter a single-line or multi-line text. You can predefine the maximum number of permitted characters. In multi-line input areas, a maximum of roughly 500,000 characters (of unformatted or formatted text) can be entered.

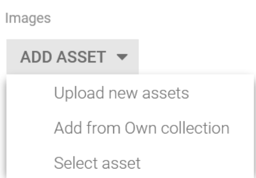
Name	Description
Selection box (single or multi-selection)	Here, you can select from predefined entries. Both dropdown lists and radio buttons are possible. Selection fields can be linked to custom objects so that, for example, centrally defined boilerplate texts can be selected.
Date picker	Here, you can enter a date or select one using a date picker.
Multimedia Selector/Upload new media	Here, you can add assets from the Media Pool or locally saved image files.
Template	Here, you can create and edit a document in *Brand Template Builder* module directly from the data sheet.
Reference/Relation *Relation*	Here, you can use data or information from different data sheets so that data object information can be displayed from the Marketing Data Hub module, for example.
Task Manager	Here, you can view the tasks assigned to the individual workflow steps, edit them, and post times required.
Grids	Here, you can list required information in a table overview. You can use two different types of grids on a data sheet. For more information see chapter 3.1.3.

3.1.1 Asset Selector

You are editing a data object that provides the *Asset Selector* variable. You want to use the variable to select an asset from the Media Pool and make it available on the data sheet. The variable is on the `Bildauswahl` tab on the data sheet.

Prerequisites:

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



Step by step:

1. Open the data sheet and go to the tab on which the variable is added.
2. Click *Add asset*.

A menu with the following items opens:

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

3. Choose *Select asset*.

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

4. Search for an asset.

In the hit list, flag the desired asset and choose *Apply*.

> **Note:** You can flag several assets.

The asset is placed on the data sheet.

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

- *Open*: This opens the detailed view of the asset in a pop-up window.
- *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 E-mail*: 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 save the asset.

> **Note:** Your authorizations determine which functions are available.

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

The data sheet remains open for further processing.

7. In the upper right area of the data sheet, click ✖.

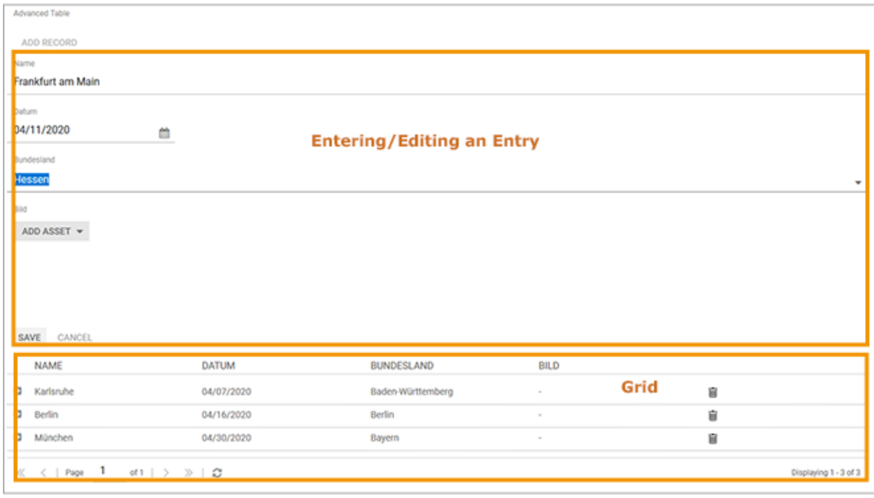
You have placed the selected assets on the data sheet.

3.1.2 Grids

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

Advanced Grid

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



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

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

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

Comfort Grid

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

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

NAME OF BROSCHURE	DATE OF PRINT	PRINT COLORS	NUMBER OF COPIES
Product X	04/16/2020	4 colours (Euro Scale)	1,000
Product Serie YY	04/21/2020	2 colours (Black + spot colour)	2,000
Service Z	04/30/2020	Black and white	500

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

3.1.3 Template

You are editing a data object that includes the *Template* variable. The variable was used to assign a template in *Brand Template Builder* module (BTB) to the data object automatically. The variable is on the `Brochure` tab on the data sheet. You want to edit the template and create a new BTB document.

Prerequisites:

- A *Template* variable has been placed on the data sheet for the data object type that you are using.
- You are authorized to edit the *TB Template* variable.

Step by step:

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

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

3. You can edit the document.

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

4. After you create and edit the document, a new icon is displayed above the preview image for the document. Click this icon to open the detailed view of the document.
5. Choose *Edit document* again to continue editing a document that has not been finalized yet.

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

3.1.4 Document Selector

You are editing a data object that provides the *Document Selector* variable. The variable is on the `Brochure` tab on the data sheet. You want to use the variable to select an existing document in *Brand Template Builder* module and add it to the data sheet.

Prerequisites:

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

Step by step:

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

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

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

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

The document has been added to the data sheet.

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

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

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

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

The data sheet remains open for further processing.

7. In the upper area of the data sheet, choose *Close*.

You have placed the selected documents on the data sheet.

3.2 Visibility of tabs and variables

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

Visibility of data sheet tabs

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

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

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

Access to variables (field functions)

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

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

4 Working with Marketing Data Hub

4.1 Creating a New Data object

You want to create a data object. To do this, you want to use a data object type from the category `Data object group A` as a template.

Prerequisites:

- You have the right CREATE_RM_REQUEST.
- You have the right SELECT_TYPE.
- The category `Data object group A` has been created.
- At least one data object type is assigned to the category `Data object group A`.

Step by step:

1. In the data object overview, select *Add data object*.
2. Enter the *Data object Name* in the input field.
3. Click into the field *Data object type*.

This opens a dropdown list.

4. Scroll to category `Data object group A`.

A list of the data object types assigned to the category is displayed below.

5. Select the desired data object type.

> **Note:** The name of the assigned workflow is displayed below the type name. If multiple workflows are assigned to a data object type, all of the workflows are listed, and you can select your required workflow.
>
> **Note:** You can use the search field located in the upper area of the dialog box to search extensive lists.

6. Choose *Add*.

The data object is now created, and the data sheet opens.

7. Enter all of the information required for the data object, such as:

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

Note: The appearance of the data sheet depends on your configuration of the data object type.

Note: If you want to connect a data object and its data in in *Brand Template Builder*t module to the *Smart Group* function, an image must be defined in the *Images* field on the data sheet and the data object must be assigned to at least one category.

8. Click *Save* to save the entered information. The data sheet remains open.
9. Click ✖ to close the data sheet and return to the data object overview.

4.1.1 Copy data object

You create a data object with the category `Data object group A`. Since you are planning an additional data object, you now want to copy the created data object, including the information and data that is already created.

Step by step:

1. Open the data sheet.
2. In the upper area of the data sheet, choose *Menu > Create data object copy*.

This opens a new dialog box.

3. Enter the name of the data object in the top input field.

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

4. *Optional*: Deactivate the checkboxes on the data sheet tab that you do not want to copy for the new data object.
5. Choose *Copy*.

The data object is now copied, and a new data object is created.

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

4.1.2 Sub data objects

You can add sub-data objects to a data object to map a child data object structure. A sub-data object is linked directly on the data sheet of the parent data object. You can open a sub-data object or its data sheet from the table overview. A sub-data object is processed in the same way as a normal data object.

Properties of a sub-data object:

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

> **Note:** Use the breadcrumb trail displayed in the upper area of an open sub-data sheet to open the parent data sheet.

To create a sub-data object, the following prerequisites must be met:

- The creation of sub-data objects is permitted in the type configuration.
- The use of a type as a sub-data object is permitted in the type configuration.

Sub-data objects can be created in a number of ways:

- Sub-data objects can be created automatically with a data object.
- In the case of optional sub-data objects, the user chooses whether the sub-data objects are created automatically while creating the parent object. The user is asked about this while first saving the parent object. The user chooses whether the sub-data object is created.
- If you are allowed to manually add sub-data objects, you can add optional sub-data objects if the parent object is already running. You can access the *Optional sub data objects* button on the *Sub data objects* tab. You can click the button to open the list of available sub-data objects.
- Sub-data objects can be created manually if required. Any data object type that can be used as a sub-data object can be selected.

4.1.3 Localized data objects

You use the *Localization* function to adapt data objects to the conditions of regional markets in the Marketing Data Hub. A localized data object contains a version that is adapted to local conditions with its own data sheet and that uses an ID for each locale. You edit each version in a separate workflow and can select different workflow types for each localized version. This is important, for instance, if there are different legal requirements in the territories and a special check or certification is required.

Fields on the data sheets are either language-dependent or language-neutral. Language-dependent fields have different values for each version. If at least two variants are created for the data object, the symbol  is displayed next to the field. If you click on the symbol, the values for all created variants are displayed. You can compare, edit, and save the values.

Language-neutral fields have the same value on each data sheet. If the value on one data sheet changes, it is also updated on all of the other versions. Examples here include international data object names or technical data in standardized measurement systems (for instance, measurements in the metric system, weight specifications in kilograms).

You can also create sub data objects for localized data objects that inherit their values. Note that inheritance is only possible between localized parent data objects and localized sub data objects: The sub data object variant for *Spain* inherits its values from the parent data object variant *Spain*.

4.1.3.1 Create

Prerequisites:

- Localization is set up in your Marketing Data Hub. If you have any questions, please contact your system administrator.

Step by step:

1. In the data object overview, click *Add data object*.

The *Add data object* dialog box opens.

2. Enter the name of the data object.
3. Select a data object type that allows for localization.

> **Note:** Note that a new localized data object is always initially created using the standard locale of your system.

4. Click *Add*. If multiple workflows are assigned to the data object type, click the radio button of a matching workflow.

The *data sheet* opens.

5. Edit the necessary fields.
6. In the upper area of the data sheet, choose *Save*.
7. In the upper area of the data sheet, click on the flag and choose *Add language* from the selection list.

The dialog *Add Locale* is opened.

8. In the selection lists, make the following settings:

- *Select a locale*: Choose a locale.
- *Assign a workflow*: Choose a workflow.
- *Data Object Name*: Enter a data object name for the local variant.

9. Choose *Save*.
10. The data sheet for the local variant opens.
11. Edit the necessary fields.
12. In the upper area of the data sheet, choose *Save*.
13. If you want to create additional local variants, repeat steps 7 to 12.
14. You close the data sheet by clicking ✖ in the upper right corner.

You have created a data object that has multiple local variants.

4.1.3.2 Delete, cancel, and finish

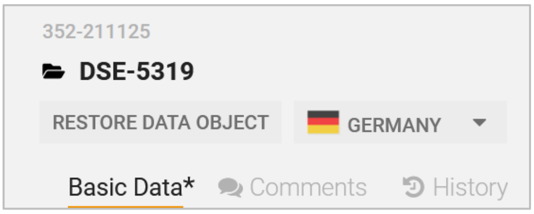
If you have deleted a data object variant, the locale entry for this data object is grayed out and separated by a horizontal separator bar. If you want to create a variant for this locale, you first have to restore the deleted variant. The reason for this is that exactly one data object variant can exist for each locale. To restore the variant, click on the grayed-out entry in the selection list. The variant is called. Then click on the data sheet *Menu > Restore Data Object*.

The behavior is similar if you cancel or finish a localized data object variant. However, the locale is displayed unchanged in the selection list.

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

4.1.3.3 Restore Data Object

It is possible to de-archive data objects that have already been completed or canceled. Use the All Finished Data Objects or *Deleted Data Objects* filters to search for data objects you want to restore.



You can access the function at the top left of the data sheet after opening the data object to be reactivated.

4.2 Participants

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

Prerequisites:

- You have the appropriate authorizations for adding additional participants to a data object.

> **Note:** When a user group or organizational unit is selected, all of the users in the user group or organizational unit are added.
>
> **Note:** Use the standard filter *Data objects I Participate In* to list all of the data objects to which you have been invited as a participant.

4.2.1 Inviting participants to a data object

You have created a new data object with the category `Produktgruppe A`. You now want to invite the users `Ralf Mustermann` and `Dennis Demo` as participants so that both users can call the job using the standard filter *Participating data objects* and can keep informed about its current status.

Prerequisites:

- You are the creator of the data object or have equivalent authorizations.
- The users that you want to add as participants can access the *Marketing Data Hub* module.

Step by step:

1. Open the data sheet.
2. Open the *Participants* tab.
3. Use the search field to search for the user `Max Mustermann`.
4. Select the user `Max Mustermann` from the suggestion list.

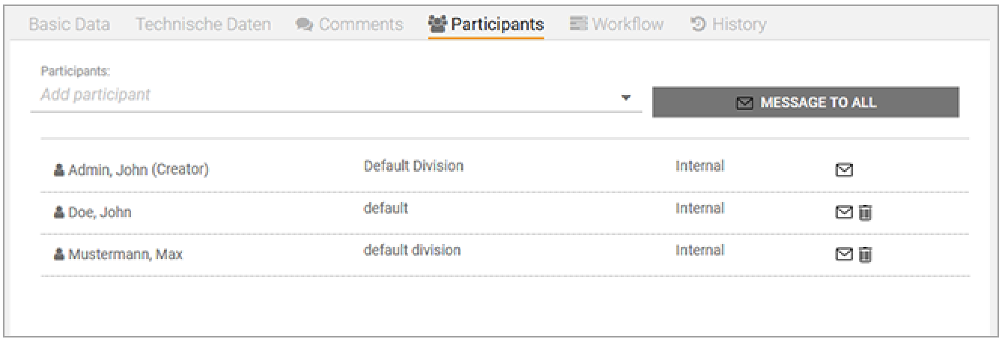
The user `Ralf Mustermann` is displayed in the table overview.

5. Use the search field to search for the user `John Doe`.
6. Select the user `John Doe` from the suggestion list.

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

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

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



4.2.2 Sending messages to participants

You want to send a message to all participants in a data object.

Prerequisites:

- You are the creator of the data object or have equivalent authorizations.

Step by step:

1. Open the data sheet.
2. Go to the *Participants* tab.
3. Choose *Message to all* at the top of the datasheet.

This opens the *Message* dialog box. The participants are already entered as recipients.

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

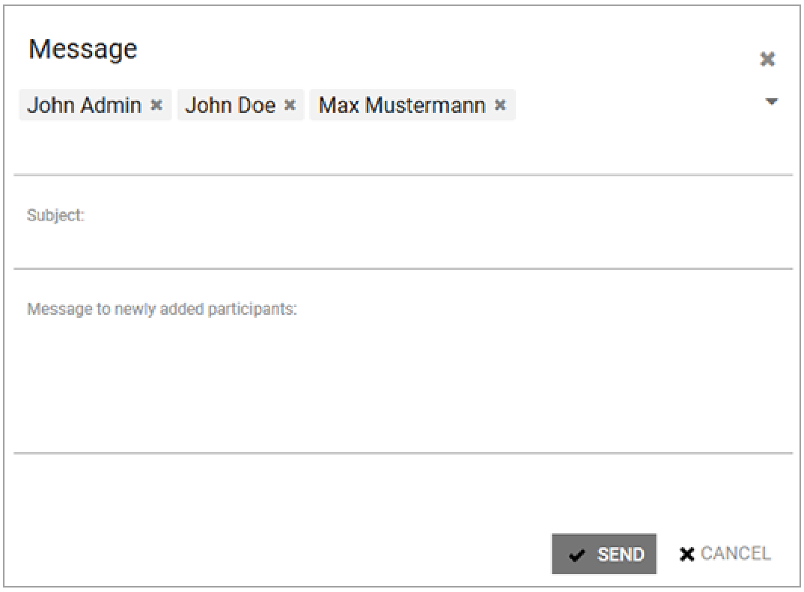
4. *Optional*: You can add additional recipients by searching for users using the input field.
5. Enter the *Subject* and the *Message* in the input fields.
6. Choose *Send*.

The message is sent to the selected recipients.

Sending a message to a selection of participants

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

The message is sent to the selected recipients.



4.3 Workflow

4.3.1 Defining the start and end date for workflow steps

You have created a new data object. The data object workflow consists of the steps `Technical data`, `Legal check`, `Technical check` and `Approval`. You are responsible for the workflow step `Technical data` and have gathered the information required for this on the data sheet. You now want to define the start and end date for the workflow steps `Legal check`, `Technical check`, and `Approval`.

> **Note:** You can only enter the start and end date for a workflow step manually if task management is not in use. If task management is activated on the data sheet, it is not possible to enter them manually for the workflow steps. The dates are then transferred from task management.

Prerequisites:

- Task management is not in use.

Step by step:

1. Open the data sheet.
2. Go to the *Workflow* tab.
3. Click the *Start date* column for the workflow step step `Legal check`.

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

An input field opens.

4. Enter the date when you want the step to start.
5. Use the date picker to select the *Due date* for the workflow step `Legal check`.
6. Use the date picker to select the start and due date for the workflow step `Technical check`.
7. Use the date picker to select the start and due date for the workflow step `Approval`.
8. *Optional*: Choose *Forward to this step* on the level of the `Legal check` workflow step to forward the data object in the workflow.

> **Note:** From the dropdown list, select the assignee responsible for the next workflow step.

9. Click *Save*.

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

4.3.2 Changing the creator

You have created a data object. The data object consists of the following workflow steps:

- `Technical data`
- `Create texts`
- `Legal check`
- `Technical check`
- `Approvals`

The data object is currently in the workflow step `Create texts`. You now want to change the creator of the data object as well as the current assignee.

Prerequisites:

- You are the creator of the data object or have corresponding authorizations.

Step by step:

The creator is reassigned in the initial workflow step.

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

A dropdown list is displayed.

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

You have changed the creator.

4.3.3 Changing the assignee

Prerequisites:

- You are the creator of the data object or have corresponding authorizations.

Step by step:

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

> **Note:** Carry out the following instructions for the first work step and the subsequent worksteps. The first workstep is the initial step and can be assigned only to the creator. See Changing the creator; see chapter 4.3.2.

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

A dropdown list is displayed.

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

You have specified the assignees for the workflow steps.

Note

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

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

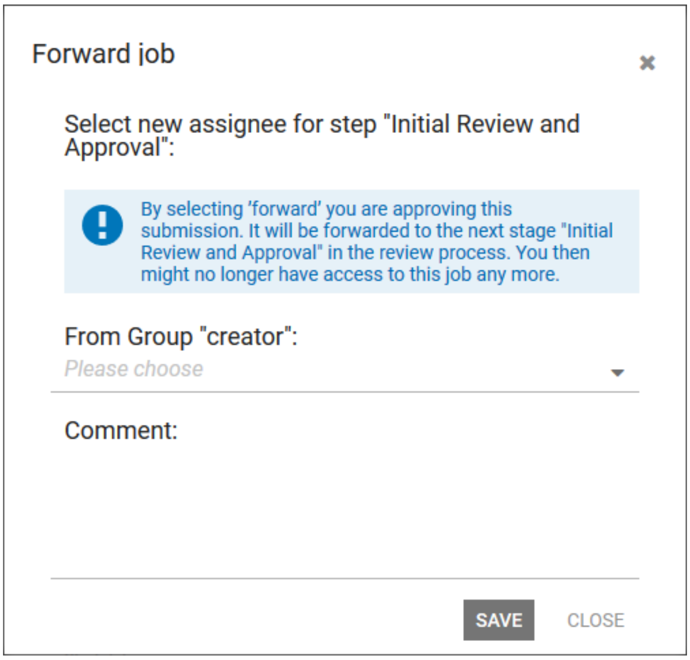
4.3.4 Forwarding a workflow step

Forwarding a job using drag and drop in the Kanban view

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

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

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



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

The comment is displayed in the main discussion on the data sheet.

6. Click *Save*.

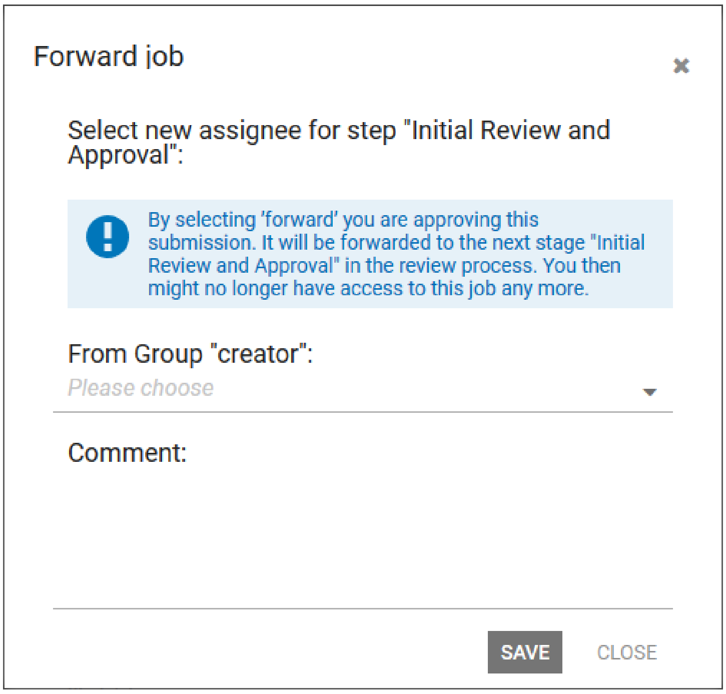
You have forwarded the data object to the workflow step.

Forwarding a data object in the header in the data sheet

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

1. In the header, choose *Forward Data Object*.

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



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

The comment is displayed in the main discussion on the data sheet.

4. Click *Save*.

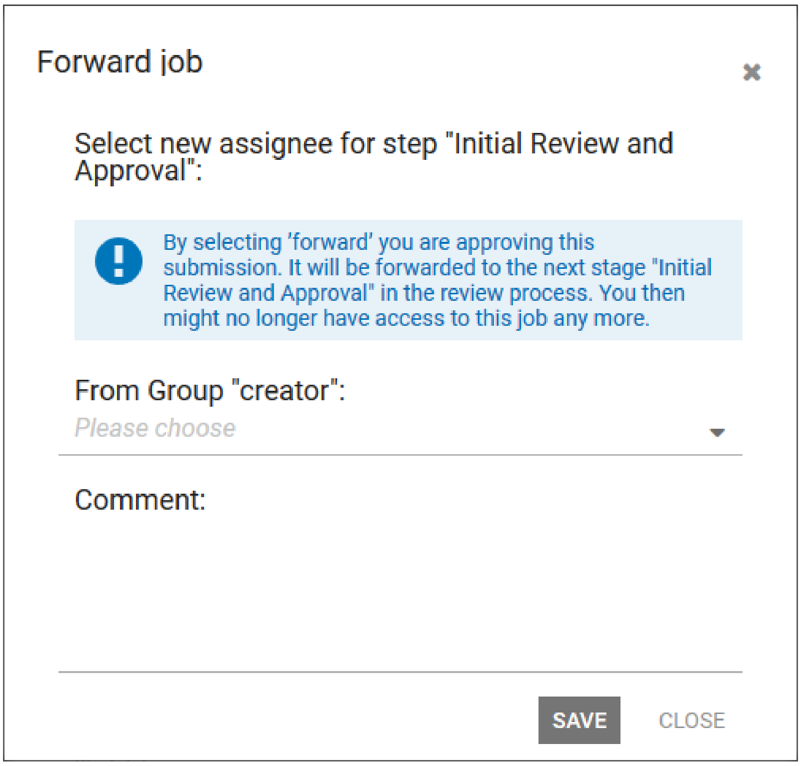
You have forwarded the data object to the next workflow step.

Forwarding a data object on the *Workflow* tab

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

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

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



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

The comment is displayed in the main discussion on the data sheet.

5. Click *Save*.

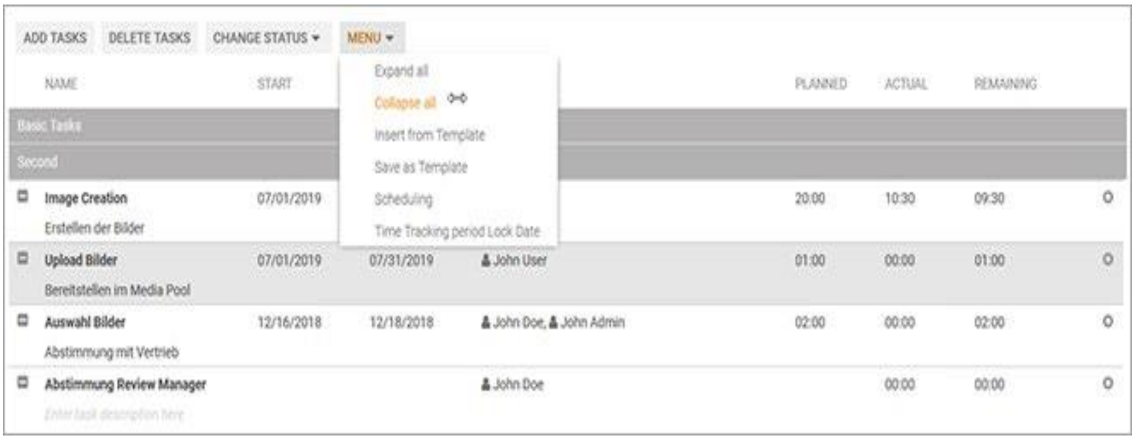
You have forwarded the data object to the workflow step.

4.4 Task Manager

You can use *tasks* to plan data objects in more detail. Depending on the configuration of the data object type, tasks are created automatically with the data object. The individual task steps defined in a *task template* are then allocated and assigned to the appropriate workflow steps. The individual task steps are displayed clearly in a table below the corresponding workflow steps on the data sheet.

Prerequisites:

- The *Task Manager* variable/field function is used on a tab on the data sheet.



Overview of the Task Manager

Column	Description
Name	This displays the name of the workflow step and the name of the corresponding task.
Start	This displays the start date on which you want the task to begin.
Finish	This displays the planned completion date.
Assignee	This displays the user selected as the assignee.
Planned	This displays the estimated required time (in hours) that is scheduled for the completion of the task.
Actual	This displays the actual time required for the task. **Note:** The value is transferred from the worklog of the responsible assignee.
Remaining	This displays the difference between the planned and actual time required.
Status	This displays the task status selected by the processor (*New*, *Work Started*, *Finished*, *Canceled*).

Overview of the Task Manager functions:

Name	Description
Add Tasks	This creates a new task below the task that is currently selected. If no task is selected or if the workflow step does not contain a task, then the task is created below the last workflow step.
Delete Tasks	This deletes the task that is currently selected.
Change status	You can assign a new status (*New*, *Work Started*, *Finished*, *Canceled*) for the selected task.
Menu	From the context menu, you can choose: • *Collapse all*: The tasks displayed below the workflow steps are hidden. • *Expand all*: Any existing tasks below the workflow steps are displayed. • *Insert from Template*: This opens the *Import Task Template* dialog box, in which you can select a new task template. When you add a new task template, the existing tasks are deleted. **Note:** You can use this function only if at least one task template that is suitable for the workflow is available (the number of individual tasks must match the workflow steps). • *Save as Template*: You can save tasks that you have added to the workflow steps as a task template. **Note:** You must have the right CREATE_TASK_TEMPLATES to save tasks as task templates. • *Scheduling*: The scheduling function makes it easy for you to move all start and end dates that have been entered already (if the start is moved, for instance). A condition for doing this is that the workflow must not have started yet. You select the start date or end date of a task as the reference data and move it to a new date. All of the entered dates are then moved with the same time span as the reference date.

4.4.1 Assigning a task and creating a new task

You have created a data object group with the category `Data object group A`. The data object has the following workflow steps:

- `Technical data`
- `Create texts`
- `Legal check`
- `Technical check`
- `Approvals`

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

Step by step:

1. Open the data sheet and switch to the *Task management* tab.

> **Note:** If you have created a new data object, you must first save it before you can enter new tasks in the Task Manager.

2. Click the *Plus* sign for the workflow step `Create texts` to display the existing tasks.

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

3. Select the task `Make available in the Media Pool`.
4. Double-click the cell in the *Assignee* column.

This activates edit mode for the cell.

5. Use the input field to search for the user `Ralf Demo`.
6. Press ENTER to confirm your selection.

The user `Ralf Demo` is entered as the assignee. The task `Make available in the Media Pool` remains selected.

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

7. Choose *Add Tasks*.

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

8. Enter `Review Manager discussion` as the name for the task.
9. Press ENTER to confirm your entry.

The task `Review Manager discussion` has been created.

10. Double-click the cell in the *Assignee* column.

This activates edit mode for the cell.

11. Use the input field to search for the user `Ralf Demo`.
12. Press ENTER to confirm your selection.

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

13. In the *Start* and *Finish* column, enter the start and desired delivery date.
14. In the *Planned* column, enter `2` for the time required.
15. Press ENTER to confirm your entry.

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

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

4.4.2 Rescheduling tasks

You have created a data object group with the category `Data object group A`. The data object consists of the following workflow steps:

- `Technical data`
- `Create texts`
- `Legal check`
- `Technical check`
- `Approvals`

The tasks `Make available in the Media Pool` and `Review Manager discussion` are also assigned to the `Create texts` workflow step. The dates `October 10, 2013` and `October 12, 2013` are defined as the start dates and `October 11, 2013` and `October 14, 2013` are defined as the desired delivery dates. Since dates have changed, you want to reschedule both tasks starting from the task `Upload images` and move the defined dates by `3 days`. You want the new start date for the task `Make available in Media Pool` to be `October 13, 2013`.

Step by step:

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

This opens the *Scheduling and Shifting* dialog box.

3. From the dropdown list, select the task `Upload images` as the *reference point*.
4. From the *Date* dropdown list, select the entry *starts at*.

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

5. Use the date picker to select the date `October 13, 2013` as the new start date. Alternatively, you can enter the new start date manually.
6. Choose *Calculate*.

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

4.4.3 Entering the time required

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

Prerequisites:

- Tasks and worklogs navigation is activated (> *Administration* > *Datasheet Engine* > *Other Settings* > *Marketing Data Hub*). Expand the *Other settings* section and check the *Enable tasks and worklogs* option.

Step by step:

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

   This activates edit mode. The current date is entered automatically (*Date* column).
3. Expand the row by pressing the right arrow ▶.
4. Select the *data object* field.

   This activates edit mode. The data objects assigned to you are loaded to the selection list automatically.
5. Double click the top cell in the *Task* column.

   The tasks assigned to you for the selected data object are loaded to the list automatically.
6. Choose the task `Make available in the Media Pool`.
7. Double click the top cell in the *Effort* column.

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

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

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

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

4.4.4 Changing the status of a task

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

Prerequisites:

- Tasks and worklogs navigation is activated (> *Administration* > *Datasheet Engine* > *Other Settings* > *Marketing Data Hub*).

Step by step:

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

   This opens an overview of your assigned tasks.

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

   The *Change status* button is active.

3. Choose *Change status*.
4. Select the status *Done*.

The new status is displayed in the overview.

4.5 Tracking changes

To follow the processing of a data object, you can track and display the following changes:

- Changes made on a data sheet
- Comments entered when the workflow was changed

4.5.1 Data sheet change history

You can use the change history to track when a data object is carried out or edited. In the upper area of the open data sheet, choose *Menu* > *Show change history* to open the change history in a new dialog box. The following information is displayed in a table overview:

- *Timestamp*: This displays the time at which the change was made.
- *User*: This displays the name of the user who added or edited a comment or discussion.
- *Type*: This displays the type of editing or change (for example, the addition of a new comment).
- *Old value*: This displays the original value of the edited variable.
- *New value*: This displays the new value of the edited variable.
- *Variable name*: This displays the name of the variable or discussion that was edited. Select the line to display the new and old value in the lower area of the dialog window.

Tip: Choose *Export log* to export the change history as an XLSX file.

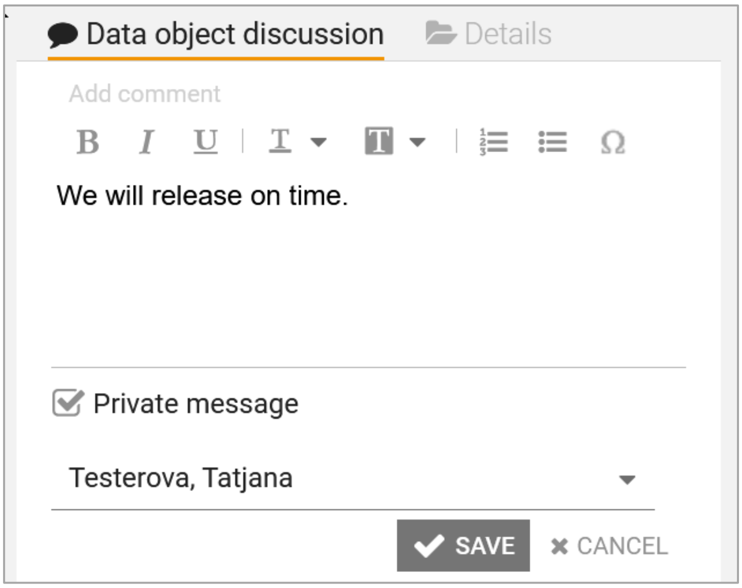
4.5.2 Comments

When forwarding a data object to the next workflow step or passing it back to the previous one, the assignee can enter a comment.

Any user with access to the data sheet can add comments in the discussion.

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

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



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

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

4.6 Data Object Discussions

You can create discussions and comment on and discuss the content for a data object. The functions required to do so are provided as standard on the *Comments* tab on a data sheet.

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

@Mentions

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

> **Note**
>
> The users displayed for you in the list depend on your Job Manager role:
>
> If your role does not have the authorization to invite users as participants to the job/process, only users who are already participants in the job/process are displayed.
>
> If your role has this authorization, the system also displays users who have not yet participated in the job/process. Adding these users makes them participants of the job/process. The participants invited in this way are notified by e-mail.

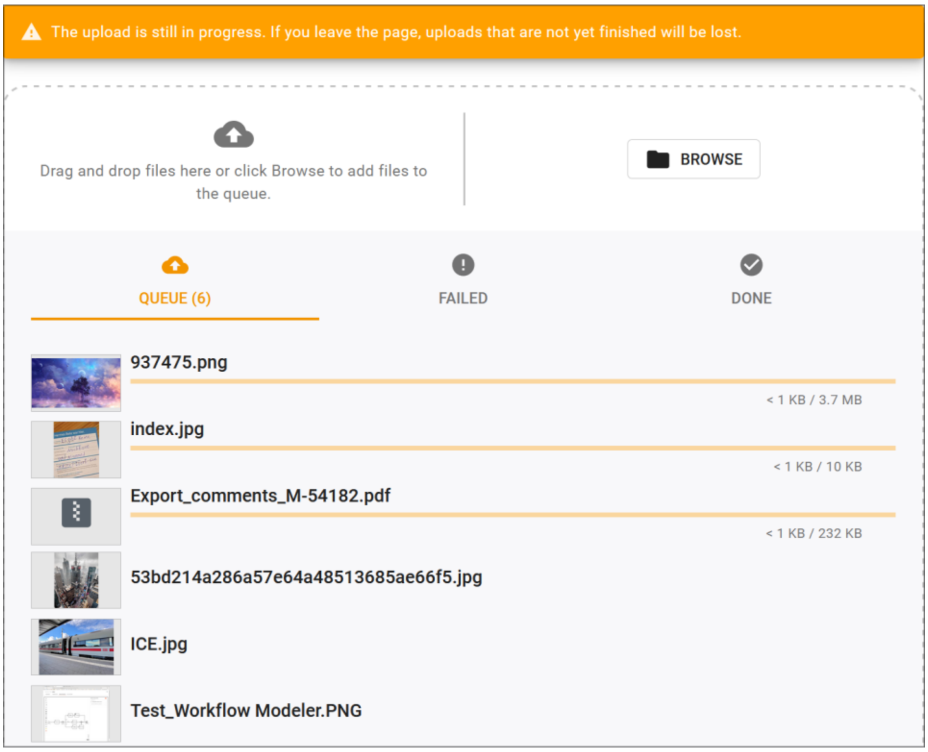
Overview of functions of the data object discussion:

Button/Function	Description
Tab *Comments* > *Add discussion*	This creates a new discussion. Enter a name for the discussion and save the name. You can then enter comments. With *Add asset you* can add assets to the discussion. • *Upload new asset:* You can add a locally saved image file • *Add from own Collection:* Add an image file from the Media Pool collection *Own DSE pictures*. • *Add website*: You add an Internet address using a URL. • *Select asset*: This opens a Media Pool search that you can use to add an asset to the data sheet.
Add comment in side panel	This also adds a comment to the product discussion.

Button/Function	Description
Replies	If you click *Reply* after a post, you can refer to it directly and your reply will initially appear immediately below collapsed under *...More comments*. Users can also reply to comments within the job discussion and in the Comments tab. Replies are displayed indented to the comment and can only ever be created at the first level. This precludes making replies to replies. Replies are initially hidden in the display. Click *N more comments* to show all existing replies to an entry. Click it again to hide the response history again.
Private message	After you have activated the checkbox, you will be asked to select a user or user group as the exclusive recipient of the discussion post or comment. When composing a reply, you cannot mark it as a private message. For users who are neither creators nor recipients, private messages do not appear in the history.
... > *Configure discussion*	In the discussion configuration, you can change the name of and participants of the discussion. **Note:** To be invited to a discussion, the users must be participants in the job/process.
... > *Print as PDF*	This creates a PDF file of the discussion.
	The pencil icon opens the selected discussion or comment for editing.
... (on the asset)	You can use the following functions for the assets added to a discussion or a comment: • *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. • *Add new version*: You can select and upload an image file as a new version of the asset. • *Open*: This opens the detailed view of the asset in a dialog box. • *Remove*: This removes the asset from the data sheet. • *Send as e-mail*: This opens a new dialog box from which you can send the asset by e-mail. • *Download:* This opens a new dialog window in which you can save the asset. **Note:** Your authorizations determine which functions are available.

4.7 Adding assets

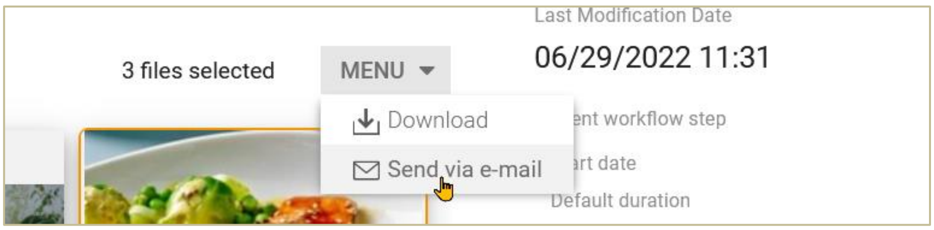
It is possible to select and attach multiple files to a job at the same time to further reduce user wait times. This feature is handled internally by the Media Pool and the new file upload service.



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

4.8 Downloading assets

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



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

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

1. Choose MENU > *Download*.

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

2. Select the *Download* button.

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

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

You have successfully downloaded one or multiple assets from a data object as a ZIP archive.

4.9 Sending assets via e-mail

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

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

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

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

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

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

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

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

You have successfully emailed one or multiple assets from a data object.

4.10 Exports

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

This exports all the data object data in XML format. In addition, the file also contains a time stamp so that you can identify when the export was carried out. When you use the *Asset selection* and *Web-to-Publish template* variable types, references to the corresponding objects are also exported.

The system does not export metadata for the data object type definition; instead, it exports just a reference to the respective data object type used.

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

4.10.1 Exporting data objects

1. Filter the data objects that you want to export.
2. Choose > *Menu* > *Export data objects*.

An info message appears.

3. Confirm the message by choosing OK.

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

4.10.2 Canceling a requested export

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

Note: If you are only allowed to view your own exports, the display of user names in the first column and the selection list above the *Requested* area are not displayed.

4.10.3 Downloading a completed export

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

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

4.10.4 Deleting a completed export

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

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

4.10.5 Import

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

4.11 Finishing or canceling a data object

4.11.1 Finish

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

Prerequisites:

- You are the creator of the data object or have corresponding authorizations.

Step by step:

1. Open the data sheet.
2. In the upper left area of the data sheet, choose *Finish*.

   This opens a new dialog box.
3. *Optional*: Enter a comment if required.
4. Click *Save*.

   The data object state switches to `Finished`. The data sheet remains open.
5. Click *Close*.

This closes the data sheet. You can access the data object using the *My Finished Data Objects* filter.

4.11.2 Cancel

You have created a project. Since the advertising brochure is not required until a later point in time, you want to cancel the data object.

Prerequisites:

- You are the creator of the data object or have corresponding authorizations.

Step by step:

1. Open the data object overview.
2. Select one or use CTRL/SHIFT key to select multiple data objects that you want to cancel.
3. Click the *Cancel* button in the button bar of data object overview.

   > **Note:** Use the *Cancel data objects* function in the *Whole filter* area to cancel all of the data objects that match the current filter, regardless of whether the data objects have been highlighted.

   A dialog box opens.
4. Choose *Confirm* to close the dialog box.

The selected data object(s) will be canceled. You can access a canceled data object using the *My Canceled Data objects* filter.