Hive9

User Guide

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EN
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Content

1 Welcome to Hive9!

Hive9 is a tool that helps you to create and manage marketing plans and calendars. It also helps you to communicate your needs to the different martech tools you use, as well as to the finance and purchasing departments. Finally, it collects performance and expense data from your martech stack and ERP systems. This data is then analyzed, predicted, and visualized to help you to understand your performance in the context of your plans and in comparison to your goals.

This user guide is designed to get you started and to provide a reference when exploring new areas. Hive9 is intuitive, and once you have been exposed to an area, it isn't likely that you will need to refer to this guide very often.

Hive9 is also very flexible and extensible and can be customized to meet your needs at several levels:

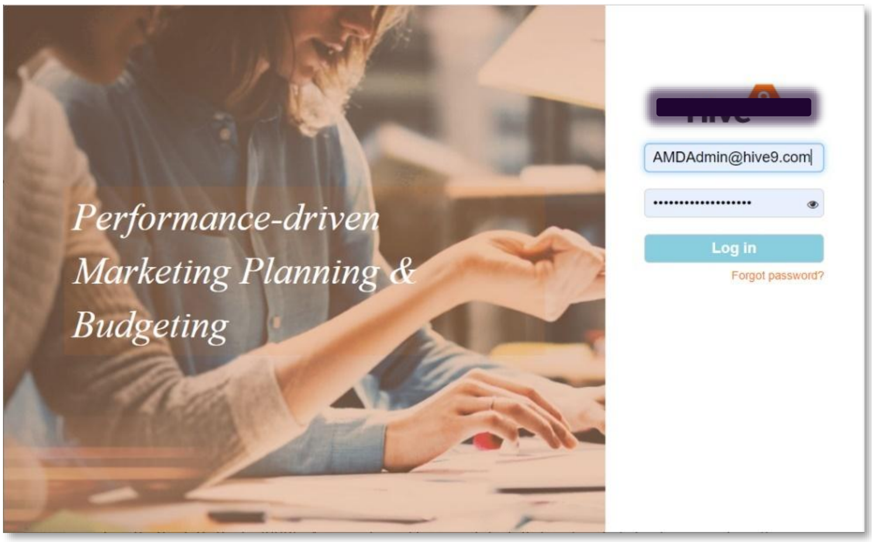
- Your organization – You can customize the number of waterfall stages and their names, as well as the names of the hierarchy levels in the plan. You'll control the names of the levels of your finance budget as well.
- Segmentation – We'll cover more on this in the guide, but you can add custom segmentation at all levels of the plan, the purchase request, the purchase request line and the imported transactions from your finance and purchasing systems
- Your models – Each model has its set of conversion rates, velocities and deal sizes, as well as its set of tactic types and integrations. Each plan is mapped to a model, so if you need it, every plan can have its model.
- Your plans – Each plan can have its budget and goals, including custom goals defined by you.
- Your teams – Users belong to one or more teams, which is how they gain access to specific plans. Certain settings can be defaulted for each user's role on each team.
- Your role – System security, set at the role, determines whether you have access to specific features. Remember, having access to a feature like budgeting does not mean you have access to every budget.
- Each User – Users can customize many aspects of their experience, from the charts that appear in their Heads-Up Display (HUD) to which

columns display in the grids and in what order. They can save custom filtered views and recall them later. They can decide which notifications they want to receive in the application and which ones they want as e-mails. They can set up their performance alerts. Users can also select the timeframe they work in from quarters down to weeks and which levels of the hierarchy they see in the grids.

With all this customization and configuration available, you should be able to set up Hive9 to look and feel like a part of your organization's fabric, using your terms and language, adapted to your specific needs.

If you need help, contact support.

1.1 Logging In

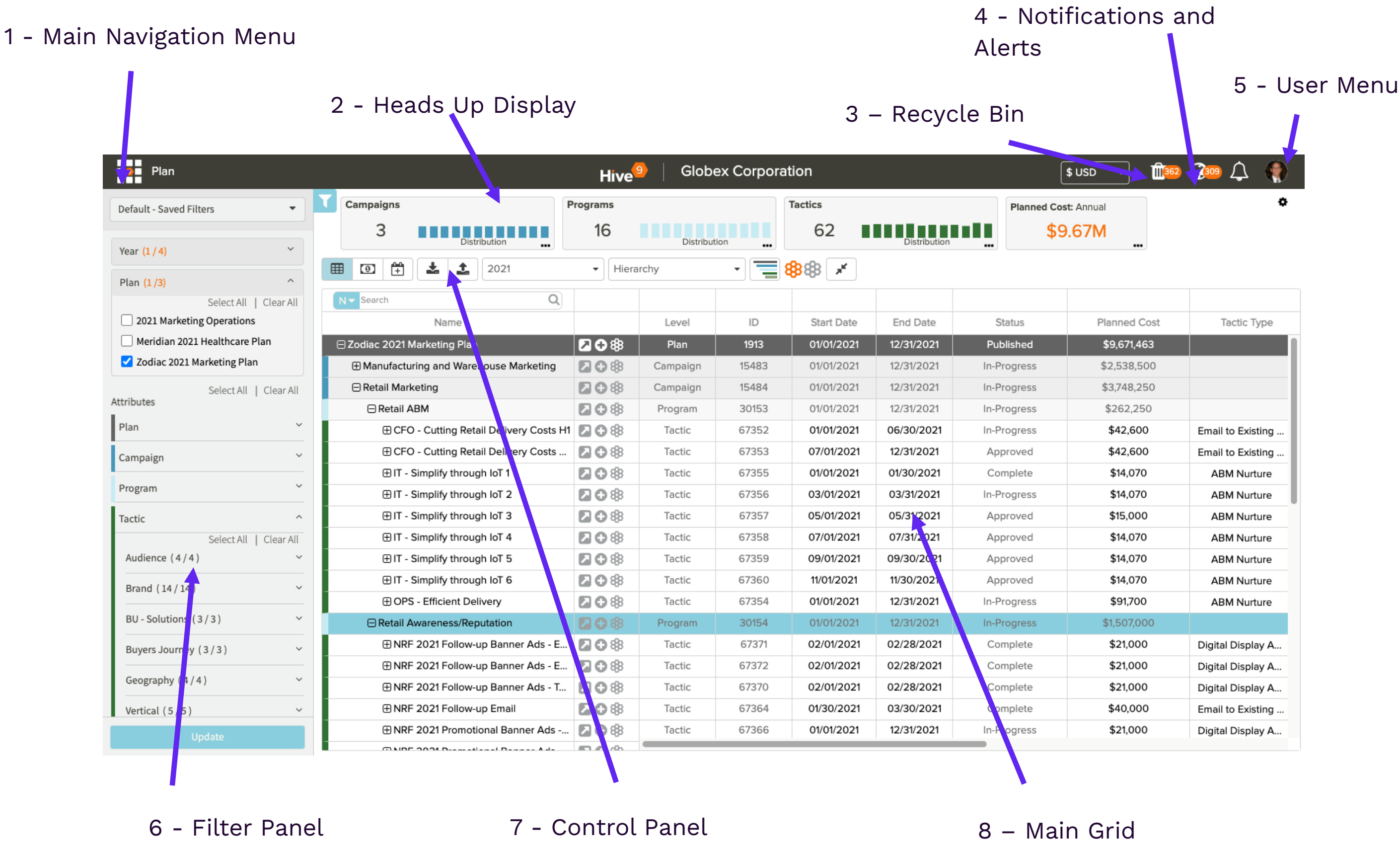


Navigate to https://plan.hive9.com/. Use the credentials you received via email.

1.2 Start Screen

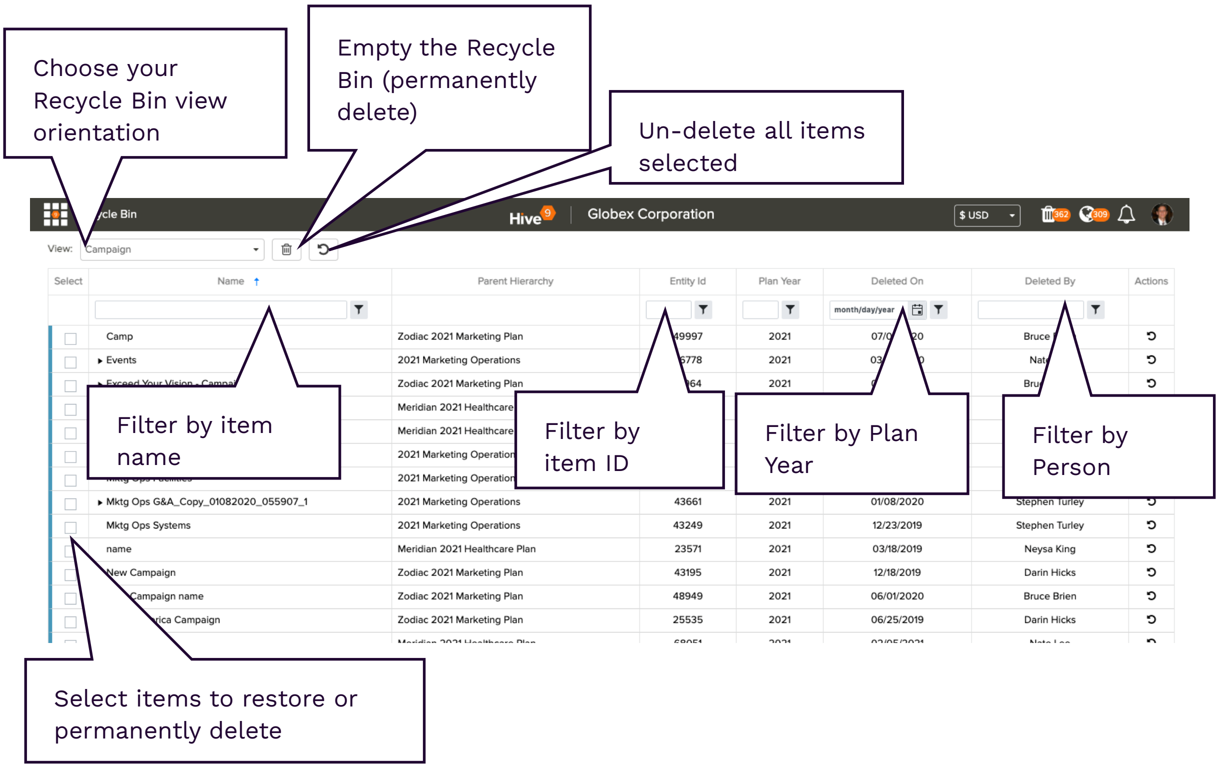
Upon logging in to Hive9, most users will first see the Plan section of the application. The screen's layout is consistently uniform, and it may resemble the following:

- *Main Navigation* – Access to all the modules of Hive9
- *Heads Up Display* – Shows relevant data on the current plan(s) that are selected (configurable)
- *Recycle Bin* – Allows users to retrieve deleted items
- *Notifications and Alerts* – Set up and view all your notifications and alerts in the platform
- *User Menu* – Administrative area of the application for user functions
- *Filter Panel* – Ability to filter your plans
- *Control Panel* – Enables you to view your plan multiple ways and Search, Import, Export, etc.
- *Main Grid* – This is where your plans are laid out in one of 3 formats, the plan grid, the calendar, or the plan budget


1 - Main Navigation Menu
2 - Heads Up Display
3 – Recycle Bin
4 - Notifications and Alerts
5 - User Menu
6 - Filter Panel
7 - Control Panel
8 – Main Grid

1.2.1 Recycle Bin

Much like a Recycle Bin in other applications, Hive9 allows users with specific permissions to restore deleted items back to the Plan Grid. The Recycle Bin is available to all Client and System Administrators. Recycle Bin may be made available by specific permission and regarding team rules for viewing and editing content. Teams and Roles are set by your System Administrators.

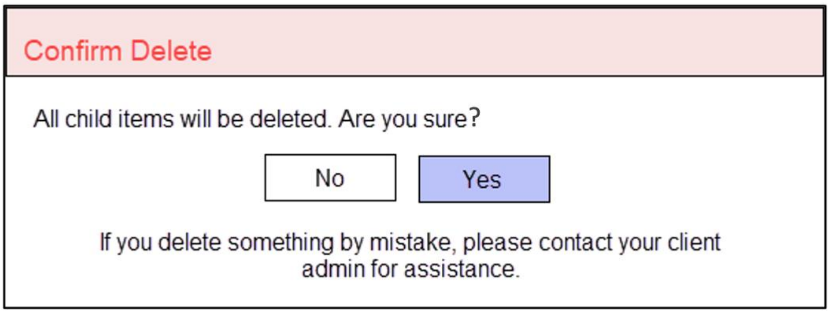


Attention

You can permanently delete or restore plans, campaigns, and programs—along with their child items, or without them.

Restored items can be moved to a different parent than where they were originally deleted.

When permanently deleting an item or items, Hive9 will ask you to confirm your deletion.



Other considerations for using the Recycle Bin:

- The parent record you are trying to recover to may have been deleted, please try another recovery option.
- Your item might have been restored, but not all attributes could be restored to their original state. You might need to edit the item before re-submitting.
- The tactic might not be recovered as the tactic type no longer exists in the plan.
- Recycle to same year only.
- Bulk un-deletes to new parents will initiate a pop-up grid to manage the assignments.
- Sys-gen balances will not be shown in the recycle bin but will be re-generated upon recycling.
- Deleted children whose parents are subsequently deleted will remain independent and must be recycled independently in reverse order to restore them.
- Children deleted with the parent can be restored with the parent if needed.
- All recycled items will return to a “created” state and must be re-submitted for any approvals.

Efficient Bulk Selection

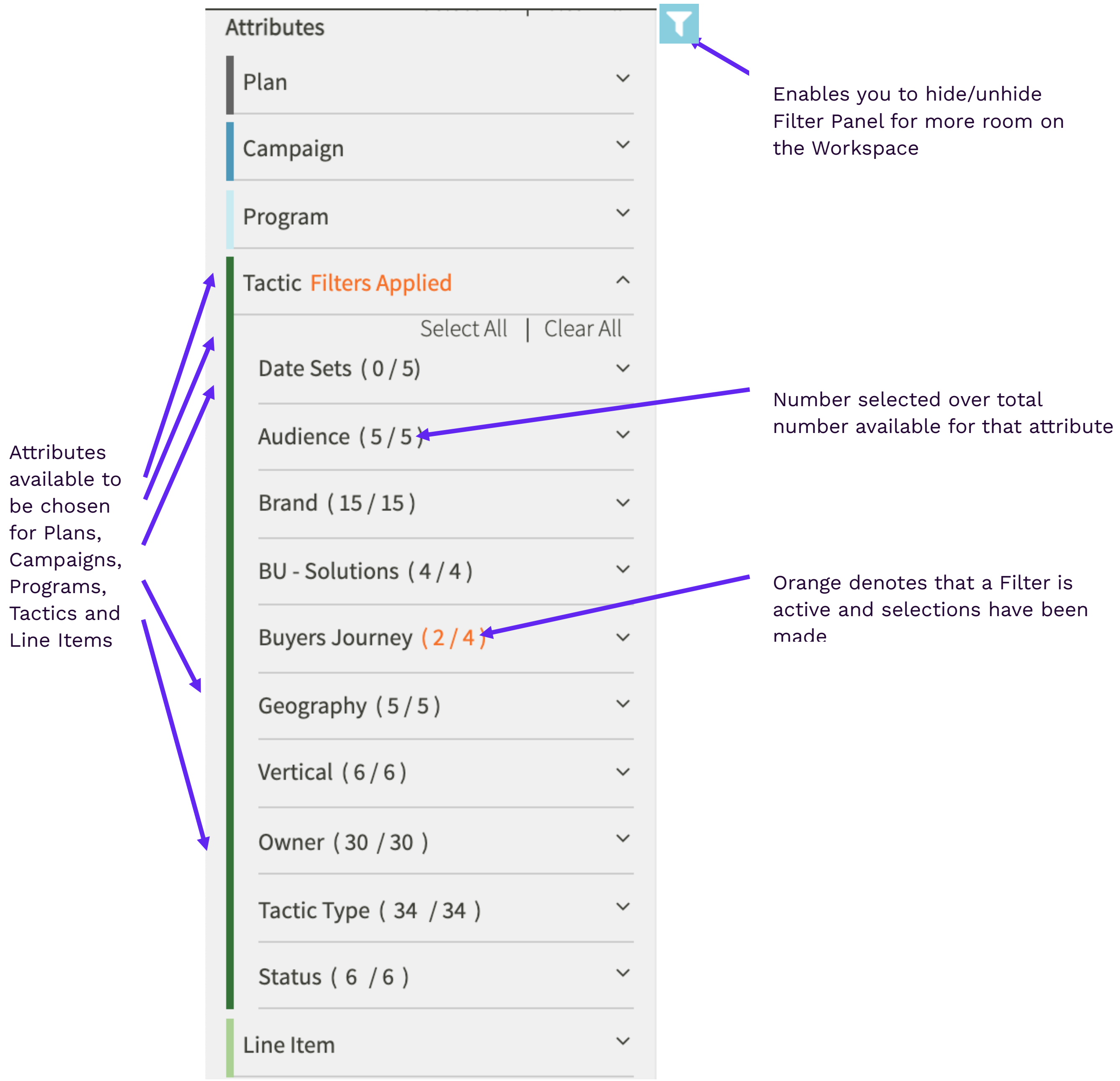
The Recycle Bin also includes a *Select All* option, allowing for more efficient management of deleted items. This feature adds a checkbox column to the Recycle Bin grid:

- Select or deselect all: A checkbox in the column header allows you to toggle the selection of all visible items.
- Individual Selection: Each row has a separate checkbox for selecting or deselecting specific items.

- This improves workflows by enabling quicker selection of multiple items for bulk restore or permanent deletion, especially when managing large sets of deleted entries.

1.2.2 Filter Panel

The Filter Panel is split into Saved Filters at the top; Year and Plan in the lower top; and Attributes for Plans, Campaigns, Programs, Tactics, and Line Items in the rest of the column.

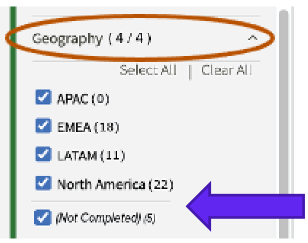


Next to each dropdown is the number of selected entries over the number of available entries. By default, all attributes will be selected when a new plan(s) is loaded.

- Year and Plan
    - The Year and the Plans dropdowns act as parents to the Attribute dropdowns
    - When a year(s) is chosen, only the plans associated with the year will be displayed in the Plan dropdown.
    - When a plan(s) is chosen, only the Owner and Tactic Type Attributes that are associated with the selected plan(s) will be available.
- Attributes
    - Owner and Tactic Type are the only tactics that are dependent on the chosen plan(s).
    - If activated in your instance, you can filter for AOP/Strategic plans, under the *Plan View* section:
        - All plans
        - Strategic/AOP Plans Only
        - Exclude Strategic/AOP Plans

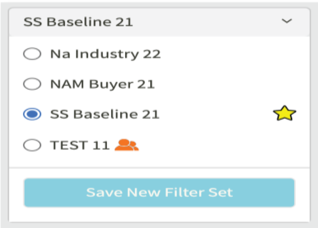
      You can activate only one of the filters at a time.
    - Attributes with more than 10 values will display a search bar in the list.
    - When you have chosen the attribute(s) that you want to display, press *Update*.

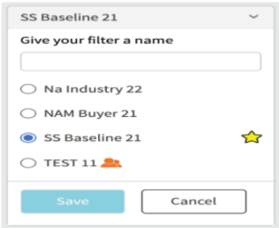
For all Attributes, Hive9 also allows users to filter by *Not Completed*, indicating no pick-list values have been selected for that Attribute. This has the same meaning as *Blank*.



1.2.3 My Saved Views – Managing Filter and Column Settings

Saved views provide you with the ability to create a personalized view of your grid data that includes both filter selections and column configurations (including which columns are displayed and their order). You can save these views for future use and set one as your default. Saving a view also saves the View By hierarchy selected on the main grid control panel. If you do not create a saved view and set it as default, then at your next login, your last used view settings will be displayed.





Save your view settings

- Select your desired filters and press Update
- Configure your columns using Column Management (select which columns to display)
- Arrange columns in your preferred order by dragging them to desired positions
- Expand My Saved Views
- Click “Save New View”
- Name your view
- Press “Save”

Your settings are now saved and can be loaded later with the exact same filters and column arrangement.

Load a saved view

- Expand “My Saved Views”
- Select the radio button next to the saved view to open
- Select the yellow star icon to set as default if applicable
- Press the trash can icon to delete a saved filter

Update a saved view

- Load the saved view you want to modify

- Adjust filters, column selections, or column order as needed
- Click the “Save” icon
- Select “Yes” from the pop-up prompt to save changes

Your saved view has been updated with the new filter settings and column configuration.

Supported Grids

The saved views functionality works across these grids:

- Plan Grid
- Budget & Cost (B&C) Grid
- Purchase Request (PR) Grid
- Accrual Request (AR) Grid

Default Behavior

Any new columns added to the system will appear at the end of your grid when using a saved view. By default, your last used view settings will be displayed when you log in, unless you've set a default view. Views can be shared with others. See chapter 1.3.

1.2.4 Reset to Default View

The *Set Default View* feature allows you to reset to your default view with a single click. Your default view can be a *Saved Preset* or another filtered/unfiltered view which you have not saved as a preset.

This enhancement adds a dedicated reset button in the “My Saved Views” section that lets you instantly clear applied filters and/or Presets and return to the default view / default Preset.

Reset to your default view

1. Navigate to any grid view where this feature is supported.
2. Expand the “My Saved Views” dropdown.
3. Click the “Set Default View” button.

Your view will immediately reset to your default state.

> Note
>
> The reset action applies only to your current session. To make this state persist across sessions, you must make sure the desired Preset has been marked as Default.

This functionality is available in the following Hive9 grids:

- Plan Grid
- Budget & Cost (B&C) Grid
- Purchase Request (PR) Grid
- Accrual Request (AR) Grid

This streamlines your workflow by eliminating the need to log out and back in when you want to reset views.

1.3 Sharing Views

You can share views that you own with other Hive9 users, as well as manage access to previously shared views. When you share a view, you're sharing your complete grid configuration including all filter selections, column choices, and column arrangements. Recipients can then load your exact view setup with a single click, ensuring everyone sees the data from the same perspective.

Sharing is based on users who have access to the plan or plans selected for the view. This means you can only share views with users who already have the required permissions to see the underlying data.

1.3.1 What Is Shared

When you share a view, the following elements are included:

- All your selected filters from the filter panel
- Your column selections from Column Management
- The exact order of your columns as you've arranged them
- Settings from both Plan Grid and Budget & Cost Grid (regardless of where you initiate the share)

1.3.2 Steps to share a view

1. Select the saved view you wish to share in the **My Saved Views** panel.
2. Click the *Share* icon next to your view name.
3. In the **Share View**: [view name]" popup, select the teams and/or users to share with.
4. Click the **Share** button to complete the sharing process.

Users will receive an email and/or in-app notification based on their settings that a view has been shared with them. The shared view will automatically appear in the recipients' "My Saved Views" panel upon the next login, ready to be loaded with all your configured settings.

1.3.3 Managing Shared Views

You can review and manage all views you've shared with others:

1. Click *User Menu* > *Settings*.
2. Navigate to the **Shared Views** tab.
3. From here you can:
    - Click the *Edit* icon to manage which teams and users have access to each shared view
    - Click the *Delete* icon to remove a shared view from all users who previously had access

1.3.4 Important considerations

Recipients must have appropriate permissions to view the underlying data in your shared view. If a recipient doesn't have access to certain plans or budgets included in your view, they won't be able to load the view at all.

Column data visibility depends on each user's permissions. While the column selection and arrangement will be preserved, the actual data displayed within those columns will reflect what each user is authorized to see based on their role and team assignments.

When team members change roles or leave the organization, remember to review your shared views and update access accordingly to maintain appropriate data governance.

1.3.5 Access Points

You can access view sharing functionality from two locations:

- **Plan Grid** - Access through "My Saved Views" in the filter panel
- **Budget & Cost Grid** - Access through "My Saved Views" in the filter panel

Regardless of where you initiate the share, your view captures settings from both grids, providing a comprehensive sharing experience.

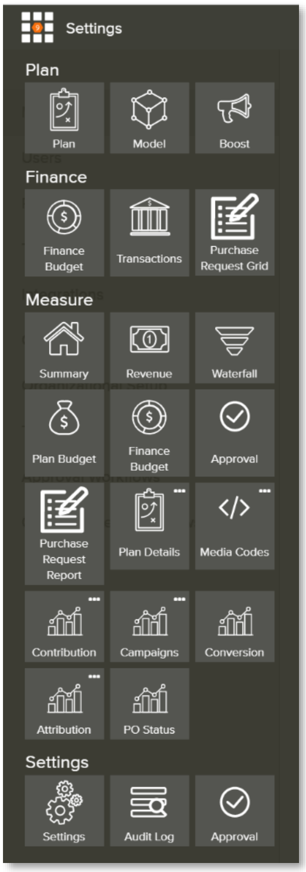
You can share views that you own with other Hive9 users, as well as manage access of previously shared views. Sharing is based on users who have access to the plan or plans selected for the view.

2 Main Navigation

The navigation menu has 4 sections that will be populated based on your role and permissions. The *Plan* section contains the components you will need to build and support your plans. The *Finance* section provides access to budgets and the purchase request grid, as well as your imported financial transactions. The *Measure* section, if enabled, will house the standard measure reports, the approvals dashboard and any custom dashboards you have deployed. Finally, the *Settings* section provides access to administrative settings, the budget audit log, and your approvals' signoff grid if you are an approver.

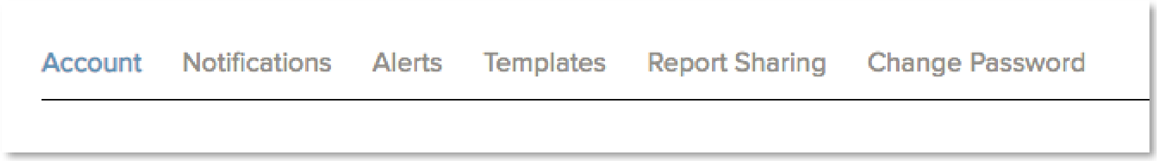
Click the Navigation Menu Icon and the Menu will expand.

The Settings menu is at the bottom of the Navigation Menu



2.1 My Account: Personal Settings

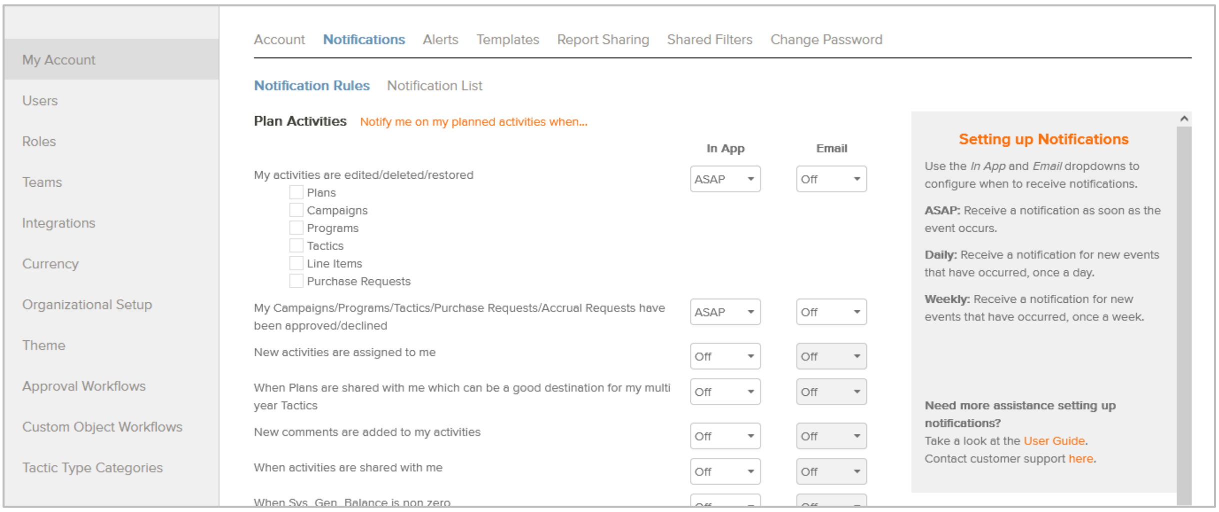
Users may edit many personal settings to better collaborate with other users in the system and access personally saved templates. These are found under *My Account* in the left navigation column, and the choices are found along the top of the browser window:



This section allows users to change various contact information, and what is editable depends on the user's permissions.

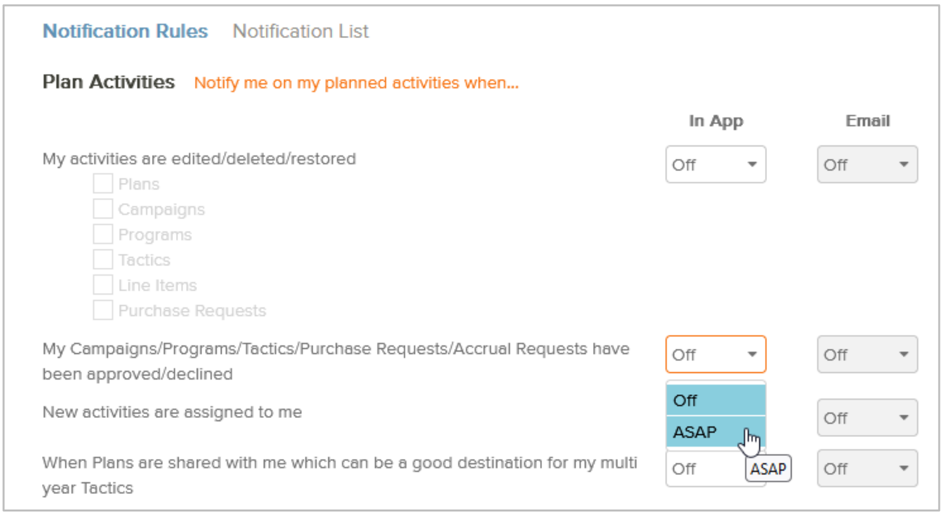
2.1.1 Notifications

You can set up notifications to inform you about various events in your Hive9 instance. Hive9 offers many standard notifications for different events, for example, when your tactics or line items are edited or deleted. Standard notifications are also available for events in finance budget, transactions, and filters. You will get an overview of the standard notifications on the *Notifications* tab.



How Do I Receive the Notifications?

You activate standard notifications by enabling it in the app. On the *Notification Rules* tab, deselect *Off* in the *In-App* column for the desired standard notification.



In this case, you will see the message about the occurrence of the event in your notification list. You can access the notification list by clicking the globe icon in the app header on the right. This will open an overview of recent notifications. If you want to see all notifications, click *See all* below the overview.

If you additionally want to receive an e-mail, turn on the sending in the *Email* column by deselecting the entry *Off*.

When deselecting *Off*, you must decide when a notification is sent:

- *ASAP*: Receive a notification as soon as the event occurs.
- *Daily*: Receive a notification for new events that have occurred, once a day.
- *Weekly*: Receive a notification for new events that have occurred, once a week.

> **Note**
>
> Not every option is available for every standard notification.

Custom Notifications

You can also set up custom notifications on the *Notifications* tab. Custom notifications inform you that a date for an object you own is coming up or has passed. You can select the following object types:

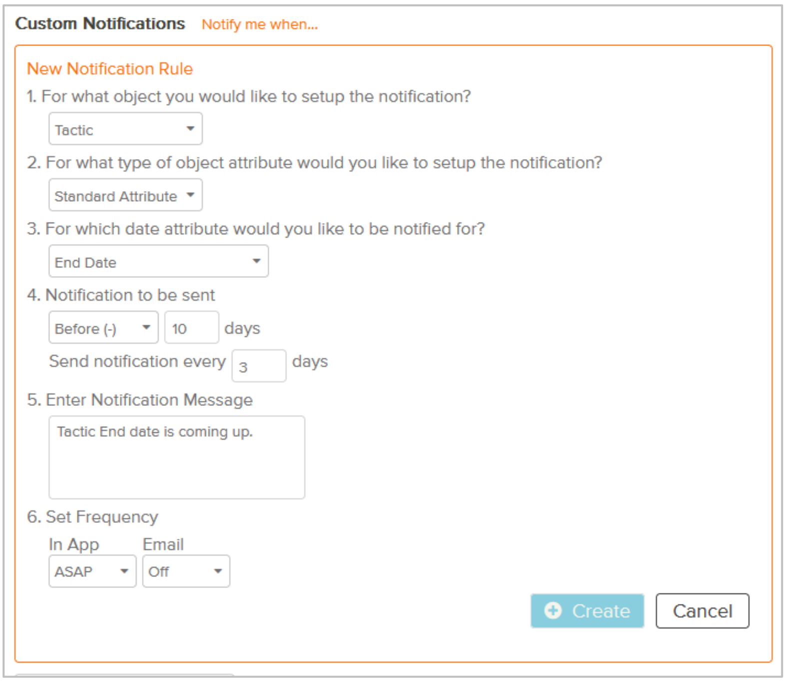
- *Plan*
- *Campaign*
- *Program*
- *Tactic*
- *Line Item*
- *Purchase Request*
- *Accrual Request*

For all object types, a notification can be triggered on a custom date attribute. For all except *Plan* it is possible to use the default date attributes *Start Date* and *End Date* as trigger.

Sending a custom notification can be triggered either before or after the selected date. The time unit is days. For example, you can set up sending 10 days before a start date or 5 days after. If you set up a sending before a date, you can choose to repeat the message, also in days, until the trigger event has passed.

> Example
>
> You want to be informed in the app when the end date of your tactics is approaching so that you can still check tactic details.
>
> You therefore set up a custom notification that informs you 10 days before the end date of each tactic in the app. The message should be repeated every three days.

The following screenshot shows how to set up a corresponding message.

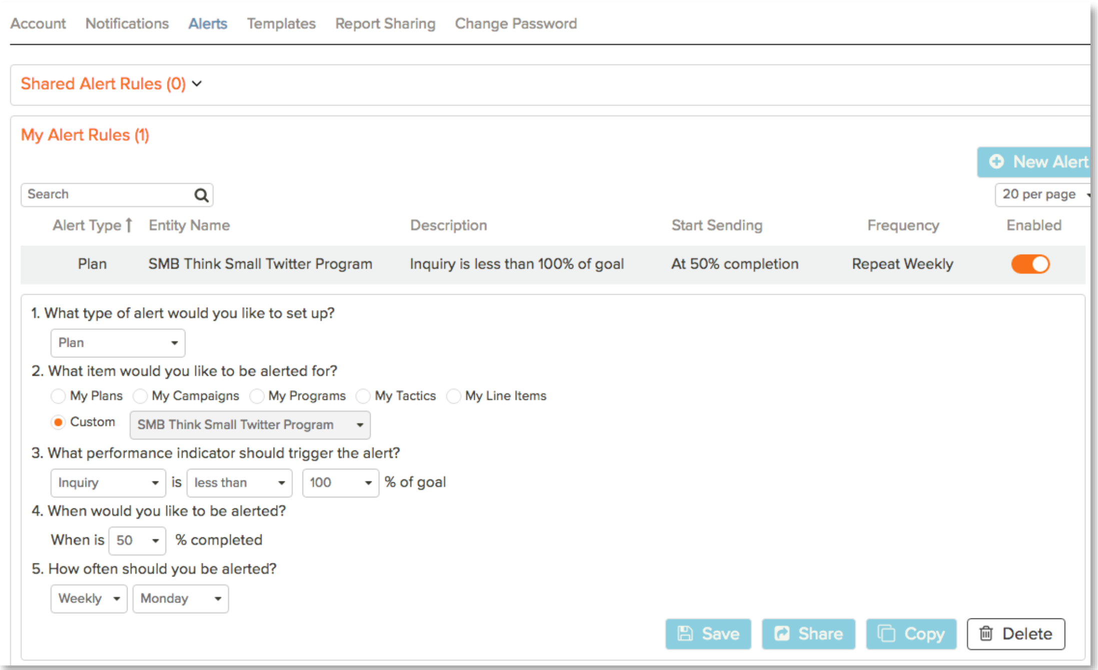


With these settings, for each tactic you own, you will receive a message 10 days before its end date. This message will be repeated 7 days, 4 days and 1 day before the end date.
You will receive the notification only in the app.

2.1.2 Alerts

Alerts are used to notify users about the performance of a specific part of their Plan activities, including Campaigns, Programs, Tactics or Line Items. Users may create any number of Alerts, and these Alerts may also be shared with other Hive9 users.

There is a wizard that walks the user through the creation of the alert to make it as painless as possible.



2.1.3 Templates and Report Sharing

Shows the list of saved templates and any reports set up to be shared on a specific schedule, such as weekly or monthly. The entries here are generated from other parts of the application. Templates are created in the Plan Grid, and Reports are shared in the Standard Reporting section of Hive9.

2.1.4 User Category

When enabled for your instance, the User Category dropdown appears in your profile settings. This mandatory field determines:

- Your classification within Hive9
- The inherited category for all content you own
- Available options for dependent attributes in your content

Your User Category automatically applies to:

- Plans you own
- Campaigns you own
- Programs you own
- Tactics you own
- Line Items you own

> **Note**
>
> Changes to your User Category automatically update all content you own. This may affect dependent attributes across multiple items.

2.1.5 Change Password

Enables the user to change his or her password at any time. Hive9 recommends changing passwords regularly and never sharing your personal password with anyone else.

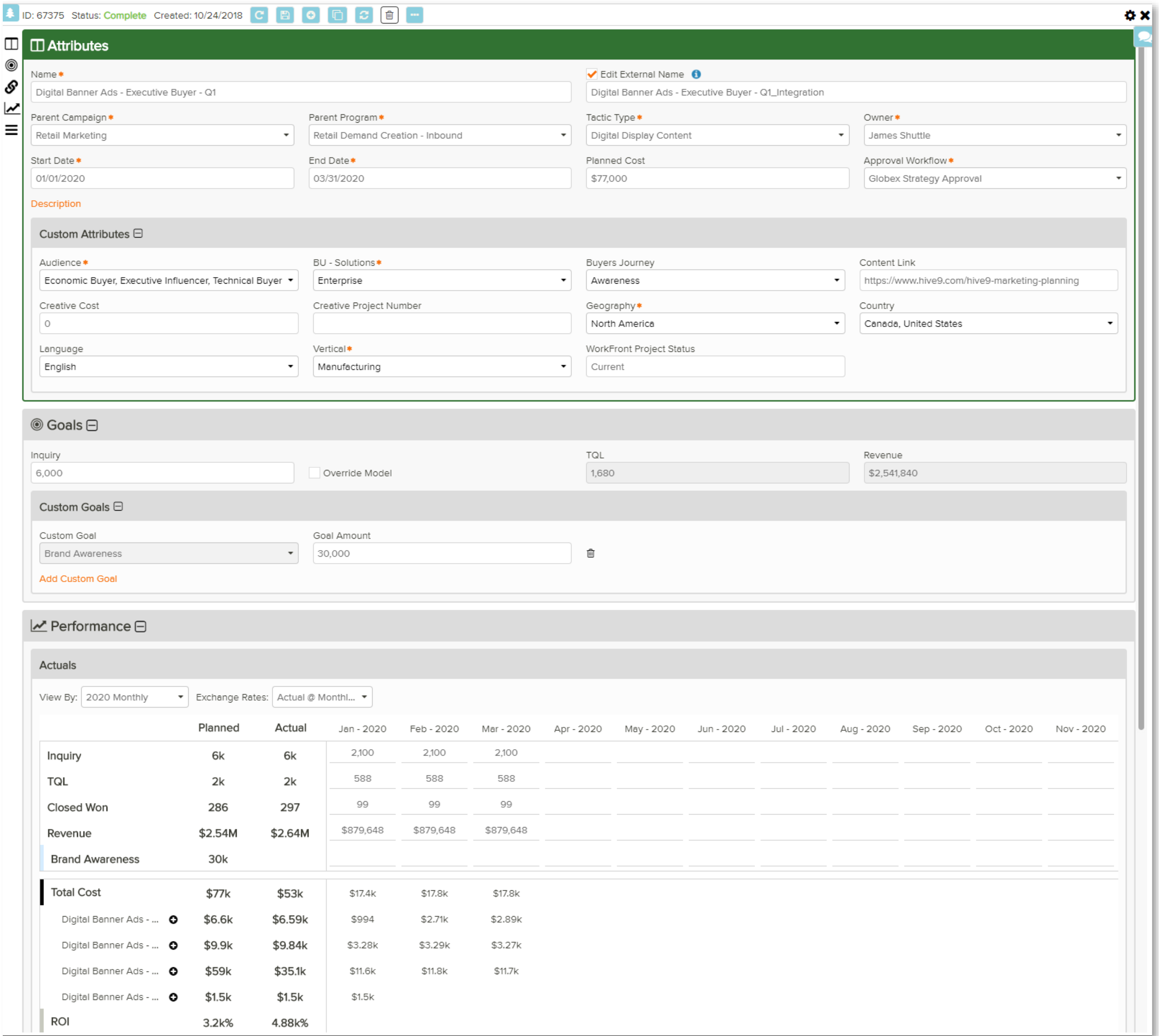
2.2 Inspection Window

The Inspection Window contains all Attributes that are associated with a marketing activity:

To open the Inspection Window:

- Grid or Plan Budget View – Single-click the View icon next to the element name
- Calendar View – Double-click the name or the colored bar associated with the activity

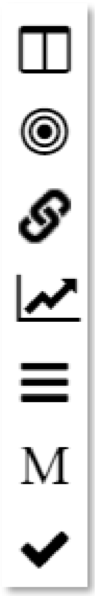
The Inspection Window will populate the screen, ready for input or edit.



Sections

The Inspection Window shows the attributes divided into sections. The sections can be re-ordered via the settings icon within the window to suit the user's needs. Each section can be collapsed as well. Optional sections only appear when needed.

To quickly switch between sections, click the icon on the left bar:



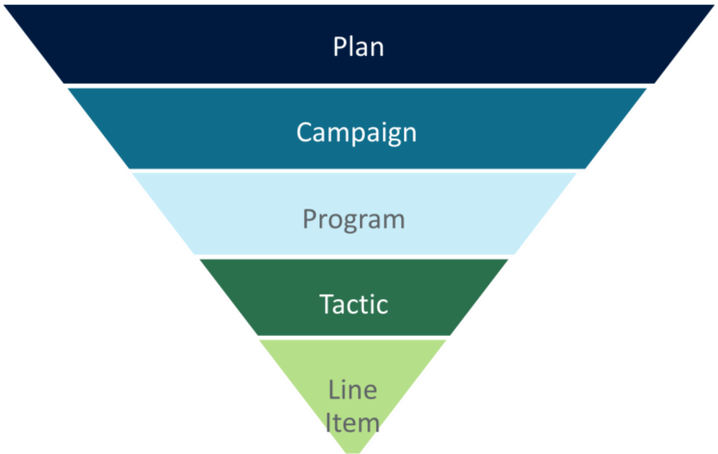
3 Plans

3.1 Basics

The first step in planning is to record how your marketing activities are structured. This structure follows the hierarchy Plan—Campaigns—Programs—Tactics—Line Items. Planning also includes financial planning and scheduling activities.

Hierarchy

This is a plan hierarchy in Hive9 with the colors you see in the system:



A plan summarizes all activities with which a specific goal is pursued. The associated measures are described in subordinate items.
A campaign consists of a theme, focused on an overarching message that houses related programs and activities and are usually longer than 9 months.
A program is a collection of similar activities like Reputation, Demand Creation, Sales Enablement, Marketing Intelligence. For example, a Social Media program is a suite of social media tactics that are executed supporting a campaign.

Tactics are tactical things that marketers do daily, for example: webinars, e-books, emails that are created and projects you manage, etc. You will likely spend most time creating and editing Tactics as they are the main objects in Hive9, and they have the most attributes and functionality.

A line item is a child object of a tactic. It's where you define and track how you'll spend your budget. You'll see planned costs and record actual spend in each line item. You'll learn more about the elements, like their attributes, your access to them, and your goals, in chapter 3.2.

3.2 Details on Hierarchy Elements

Name of a hierarchy element

The name of a plan must be unique in the system. For child elements, the name below the parent element must be unique. For example, under an *Awareness and Reputation* campaign, there can be only one *Brand Awareness* program.

Access

Access to hierarchy elements depends on your team assignments and role. When a plan is created, one or more teams are assigned to it. Users assigned to any of these teams can view the plan and its child elements. Whether you can create, edit, or delete the plan or other elements depends on your role in the team. Also note that depending on your organization's role concept, for example, you may only be able to see a plan, program, or campaign, and only edit it starting with the tactic level. Contact your administrator if you have any questions about the role concept and the assignment of teams to plans.

Time allocation

A plan is always assigned to a fiscal year. You can select the current year or up to 10 years in the future.

Campaigns and programs have a start and end date. In the settings for the system, it is decided whether this data is filled manually or automatically. You can see which option is set in your system as follows:

- *Manual*: The *Start Date* and *End Date* fields in the Inspection Window of the element are editable. At least the start date must be selected in the fiscal year.

Automatic: The *Start Date* and *End Date* fields in the Inspection Window of the element are grayed out and not editable. If no tactics exist, the start and end dates correspond to the first and last days of the fiscal year. Once tactics are added, these dates update to match the earliest start and latest end dates across all tactics.

For tactics, you usually enter the start and end dates to set the duration. With the time span thus defined, a tactic will be displayed in the calendar. However, it is not realistic to be able to assign a tactic to exactly one year. Examples include evergreen tactics. Therefore, tactics may have more than one parent program: for example, Tactic T1 may have parent P1 for year 2022 and P2 for year 2023 and P3 for year 2024.

Line items can be created outside the time span of the parent tactic. This allows you to plan costs that occur before or after the actual activity, even in preceding or subsequent years.

Owner

The creator of an element is the default owner. Subsequently, the element's ownership can be handed over to any other user who is part of a team that has access to the planning hierarchy.

Owners are usually the people responsible for the item. It may be agreed in your organization that the owner takes over process tasks such as triggering approvals or notifications.

Model

A model is assigned to each plan. A model centrally defines the criteria that will be used to measure the success of your marketing activities. The model also specifies which tactic types can be used within the plan. In addition, it defines with which third-party systems the plan exchanges data.

The models that exist in your system are managed by your administrator. Contact your administrator if you have any questions.

User Category Dependencies

When enabled, all hierarchy elements inherit their owner's User Category through a hidden system attribute. This inheritance:

- Updates automatically when changing an item's owner
- Affects dependent attributes within and across hierarchy levels
- Applies to imported content
- Cannot be modified directly (only changes through owner assignment)

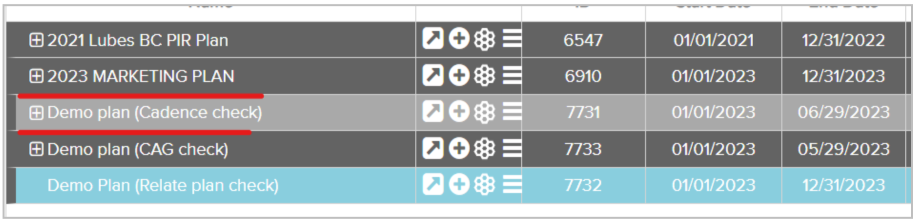
> Note
>
> You can’t edit the inherited User Category directly in the Inspection Window. To change it, update the owner’s User Category or assign the item to a different owner.

AOP/Strategic Plans

For strategic marketing, it can be helpful to mark plans as strategic. You can do this by activating the *Set plan as Strategic/AOP* checkbox in the plan's Inspection Window.

> Note
>
> This is an optional feature that might not be activated in your system. For more information, see chapter 10.8.6. or contact your system administrator.

AOP/Strategic plans are represented by the light gray color in the *Plan*, *Budget & Cost*, and the *Calendar* views:



⊞ 2021 Lubes BC PIR Plan	6547	01/01/2021	12/31/2022
⊞ 2023 MARKETING PLAN	6910	01/01/2023	12/31/2023
⊞ Demo plan (Cadence check)	7731	01/01/2023	06/29/2023
⊞ Demo plan (CAG check)	7733	01/01/2023	05/29/2023
Demo Plan (Relate plan check)	7732	01/01/2023	12/31/2023

In addition, a user can filter the AOP/Strategic Plans in the filter panel on the left-hand side.

Relate Plans

In addition to the regular marketing plan, both higher-level strategic plans and lower-level plans can exist. To be able to map the relationships, you can relate these plans. Please note that the child entities of related plans will not be related to each other.

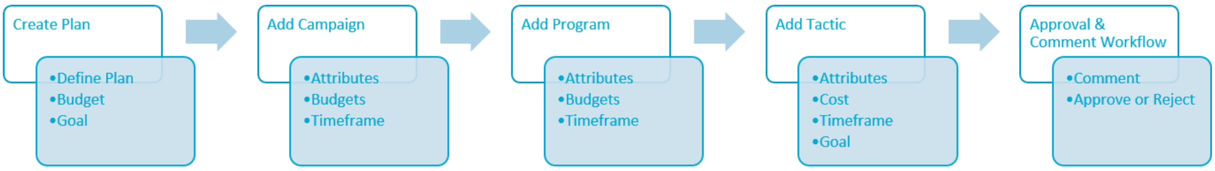
> Note
>
> This is an optional feature that might not be activated in your system. For more information, see chapter 10.8.13 or contact your system administrator.

When the feature is turned on, a *Related Plans* grid is shown in a plan's Inspection Window.

For more information, see chapter 3.9.2.

3.3 Plan Creation Workflow

Because of the hierarchy, the elements must be created in the following order. For example, you can only create a tactic under a program that already exists.



> **Note**
>
> Keep in mind that you may not be able to create all elements because your role in the system does not allow it. Contact your system administrator if you have any questions.

3.4 New Plan Creation

3.4.1 Create New Plan

- Click > Menu > Plan. Alternatively, use the Action Icon on a plan row:

- Set up the plan:

a. Choose a model.

b. Provide a descriptive name for the plan.

c. Choose a year for the plan.

d. Add a team to the plan.

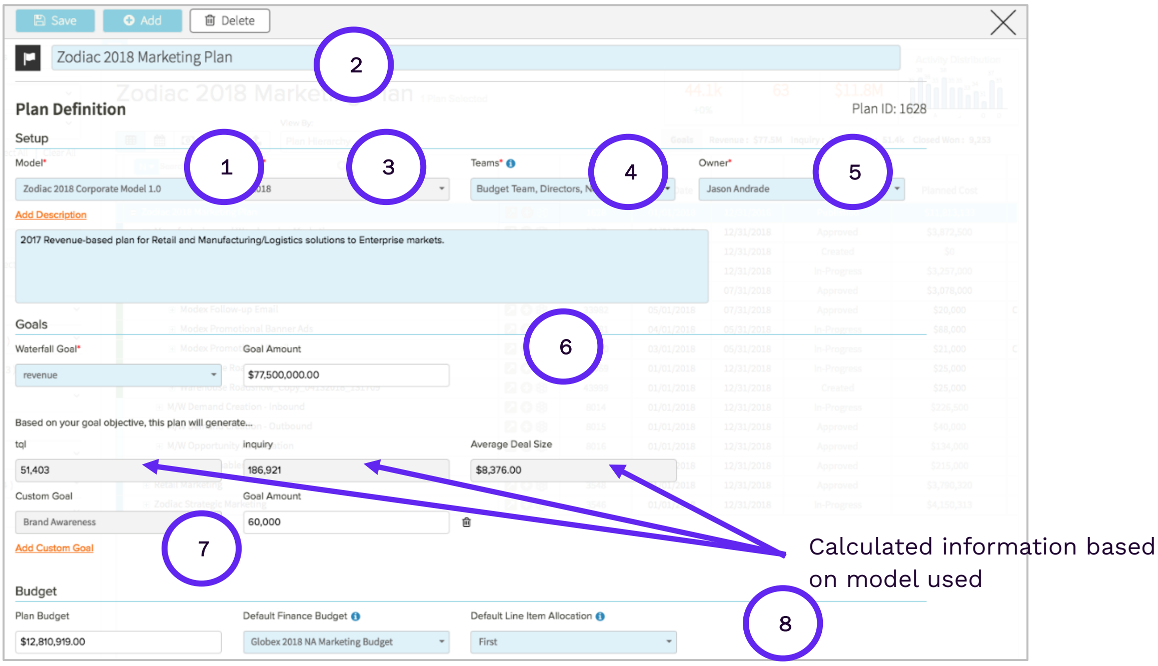
e. Choose the plan owner (if it is not you).

f. If visible and needed: Activate the *Set the plan as Strategic/AOP* checkbox.

g. Complete the goals section of the plan.

h. Add custom goals, if required.

- Complete the Budget section of the plan.

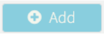


Marketing Activities

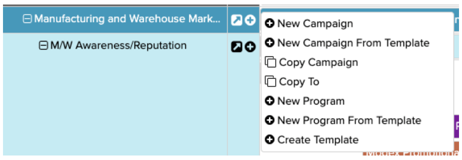
Add Campaigns, Programs, and Tactics to enter the initial plan components. At each level, you may create an item at that level, or one level (child) below that level. All Items include a Setup Tab and a Review Tab.

- Setup Tab
  - Name, Tactic Type, Start Date and End Date are needed to create a Tactic
  - Attributes with red asterisk are required. Required fields will need a value when tactic is submitted for approval and not upon creation.
- Review Tab
  - Add comments for other users
  - Submit campaign for approval. (Note: All Programs and Tactics that reside under the specific Campaign will be approved if none have been previously submitted.)
  - Share button will send a link to specified users.
  - Sync button is for manual synching of items between integrated system.

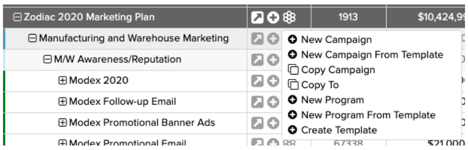
3.4.2 Add Campaigns

There are three ways to add campaigns. Click the plus icon  at the right of a Plan or Campaign, or when in a Campaign screen, click the Add button .

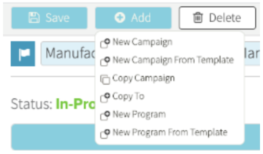
Option 1 – Calendar



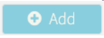
Option 2 – Grid View



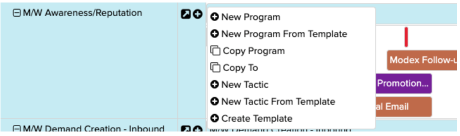
Option 3 – Inspection Window



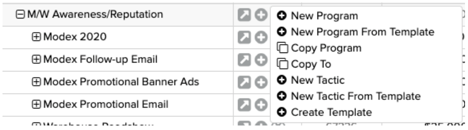
3.4.3 Add Programs

There are three ways to add programs. Click the plus icon  at the right of a Campaign or Program, or when in a Program screen, click the Add button .

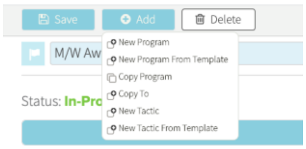
Option 1 – Calendar



Option 2 – Grid View



Option 3 – Inspection Window



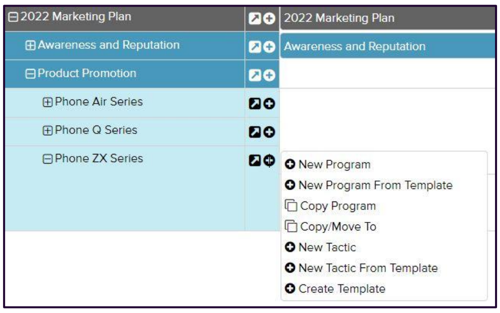
Programs work the same way as Campaigns. Differences are as follows:

- Programs can have their own set of custom attributes.
- Start and End dates must be within the confines of the respective Campaign
- Program budget cannot exceed campaign budget.

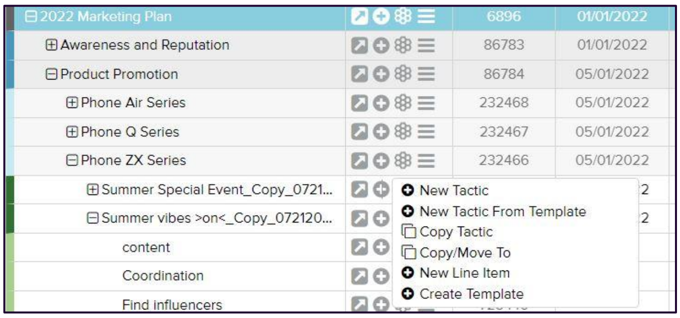
3.4.4 Add Tactics

There are three ways to add tactics. Click the caret next to the program name, click the plus icon at the far right of a highlighted tactic, or when in a program screen, click the Add button.

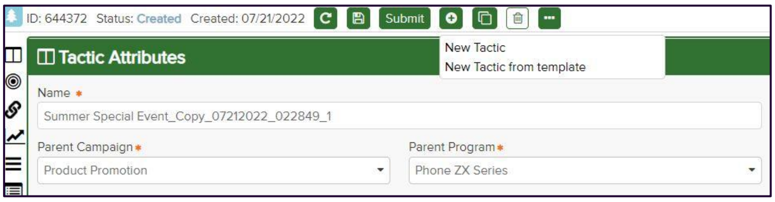
Option 1 – Calendar



Option 2 – Grid View



Option 3 – Inspection



Tactic information rolls up to Programs and Campaigns. Tactic data can be defined as a default in the Model – Planned Cost, Target Demand Waterfall Stage and Integration deployment. All default data can be changed at the time of tactic creation.

3.4.4.1 Import Tactics

You can import tactics in bulk using the *Import* button in the Workspace Control Panel. The system provides a template for importing tactics and their attributes.

When User Categories are enabled:

- Imported tactics inherit the User Category from their assigned owner
- The owner must be specified in the import file
- Attribute dependencies based on User Category are automatically applied
- If an owner's User Category changes after import, the tactic's inherited category updates automatically

3.4.4.2 Tactic Settings

The following sections describe the Tactic settings divided into the sections you will find in the Inspection window.

Tactic Attributes

The attributes section houses most of your setup choices, including an expandable custom attributes section.

Attribute	Description
Point of view	Note: Only visible for multi-year tactics that are linked with parent plans in two or more fiscal years. To learn how to link a tactic to parent plans in other fiscal years, see chapter 3.4.4.3. The selection list allows you to view a tactic and its data in different fiscal years. The fiscal year in which the tactic was created is marked with [source].
Name	Enter the name of the tactic. Be aware that the name below the parent element must be unique.
Edit External Name	Activate the checkbox if you want to edit the external name of the object. The external name is used in integrations with third-party applications. Depending on your integration changing this name may update the integrated object when synced.
Parent Campaign	Display of parent campaign
Parent Program	Display of parent program
Tactic Type	Select the type of tactic. The types available depend on the model assigned to the parent plan.
Owner	The creator of an element is the default owner. Subsequently, the element's ownership can be handed over to any other user who is part of a team that has access to the planning hierarchy.

Attribute	Description
Date Settings	Tactics need a time specification: Each tactic has a *Start Date*. By default, you will also see an *End Date*. Enter the start date and the end date of the tactic. Both dates can be in the parent plan's fiscal year or a subsequent year. Note that start date must be before the end date. If you enter start and end date in different fiscal years, then you create a multi-year tactic. Please refer to chapter 3.4.4.3 for more information. If you create an ongoing or evergreen tactic, activate the appropriate checkbox (see following description). Then the tactic will not have an end date. In this case, you create a multi-year tactic. Please refer to chapter 3.4.4.3 for more information. Depending on the settings in your system, you may see the following fields: • *Due Date:* Enter the due date of the tactic. The date is independent of the tactic's start and end date and the parent plan's fiscal year. • *Build Date* and *Completion Date*: Enter the build date and the completion date of the tactic. These specifications are independent of each other and the start and end dates. They also do not depend on the fiscal year of the parent plan. • *Start Time* and *End Time*: Enter the start and end time of the tactic. This can be useful for webinars, for example.
Ongoing Tactic / Evergreen Tactic	If you create a tactic that lasts indefinitely into the future from a certain date, activate the checkbox. Then the tactic will not have an end date. Note: Once a tactic is saved as evergreen or ongoing, this attribute cannot be edited. To unmark a tactic as evergreen, close the tactic and create a new tactic, for example, a Multi-Year Tactic with start and end dates.
Planned Cost	Enter the costs you plan to incur for the tactic. Planned cost may be mandatory, optional, or hidden based on your system's settings.
Multi-Year	If the cost of the tactic is incurred over multiple years, this is created using line items in different fiscal years. Please refer to chapter 3.4.5 for details. The Multi-Year sub-grid shows in which different years line items are created for the tactic.
Custom Attributes	The Custom Attributes area displays the attributes created for your instance. Contact your administrator if you have any questions.

Attributes of Multi-Year Tactics

Attributes of multi-year tactics will stay consistent across all years. To change the attributes of a multi-year tactic, create a new tactic with changed attributes.
Evergreen tactics are incompatible with plans that use attribute dependencies. If the dependencies change from year to year, the tactic's attributes will be based on the first year that the evergreen tactic was created in.

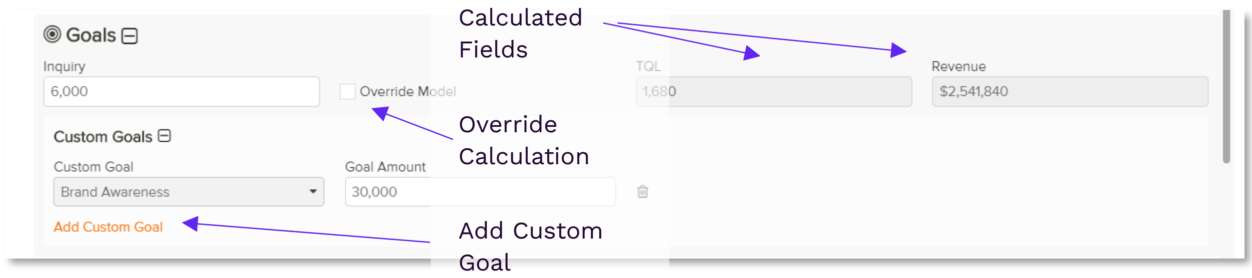
10-Year End Date Restriction

To improve system performance, particularly during cost allocation calculations, a new restriction has been implemented on setting end dates for tactics.

Area	Restriction
General Rule	End dates cannot exceed 10 years from the current plan year
Tactic Inspection Window (IW)	• Select any date up to 10 years from current plan year • Error message if date beyond limit is selected
Plan Grid and Calendar Grid	• Extend End Date up to 10 years from current plan year • Attempts to set later dates prevented
Bulk Edit	• Set End Dates up to 10 years from current plan year • System prevents setting End Dates beyond this limit
Importing Tactics	• All End Dates in import file must be within 10-year limit • Tactics exceeding limit not imported, error message displayed

Goals

The goals section will contain both your waterfall and custom goals.



Set the number of inquiries that the tactic should generate. Based on the model assigned to the parent plan, the *TQL* and *Revenue* fields will result. If you want to override the settings of the model, activate the checkbox. Then you can directly enter values for TQL and Revenue.

If you want to create your own goals, click *Add Custom Goal*. Select a Custom Goal from the drop-down list and enter a target value.

Goal horizon can be set beyond the in-market dates to allow teams to capture delayed results.

For evergreen tactics, the goal horizon will be the end date of the fiscal year furthest in the future for that tactic (start date or inserted results date).

Tactic goals are spread across the in-market months, plus the goal horizon, enabled from the tactic types within the model.

Integrations

The integrations section will show any connections this record has to other systems.

Performance

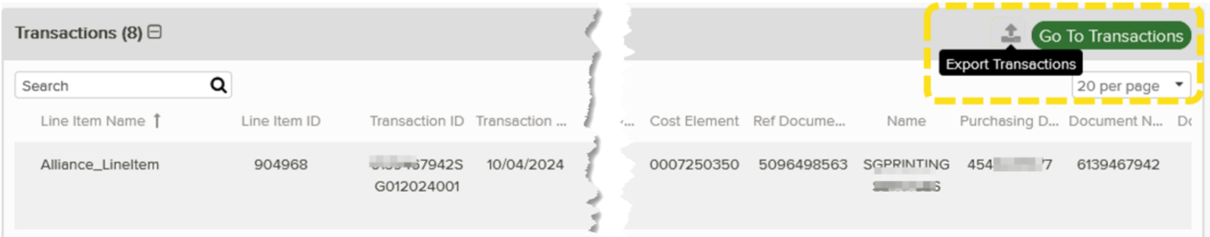
The performance section shows the waterfall performance of the tactic, as well as the costs in a summary grid. The detailed transactions appear in a collapsible list below the grid.

You can select multiple years when adding performance actuals via the *+ Year* button.

Exporting Transactions

You can export transaction details directly from the Tactic Inspection Window:

1. Locate the Export Transactions button in the Transactions section.

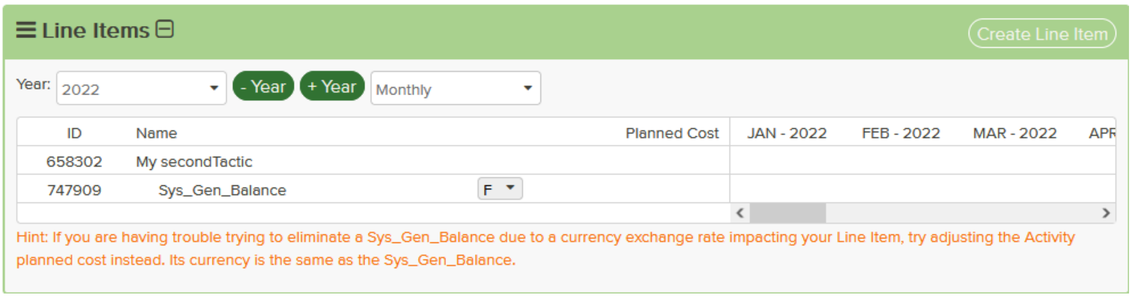


2. Click the button to download an Excel file containing all transactions for this tactic.
   - The export includes all columns shown in the Transaction grid
   - The file is named "Transactions_Tactic#[tacticID]_[date-time].xlsx"
   - The date-time stamp follows your local machine settings

> **Note**
>
> If you can view transactions in the Tactic Inspection Window, you can also export them - no additional permissions are required.

Line Items

The line items section contains the cost element breakouts and the links to the financial budgets. All purchase requisitions are also stored here.



For more details, see chapter 3.4.5.

Media Code

The media code section for creating and managing unique media codes and their segmentation are displayed here when the tactic type requires it. Note

that media codes are attached to tactics, not line items. Media codes will also be displayed as sub-grid.
For more details, see chapter 3.4.4.5.

Approval Tracker

The approval tracker appears here when active.

3.4.4.3Link Multi-Year Tactics to Different Parent Programs

When a tactic spans two or more years, you create a multi-year tactic. This occurs in two cases:

- You have placed the start and end dates of a tactic in different fiscal years.
- You have checked the *Ongoing/Evergreen Tactic* checkbox in the Inspection Window of the tactic.

For all data mapping to be performed correctly in the system, you must map the tactic to a new parent program in each required fiscal year:

- Create the multi-year tactic. Make sure that the start date is in the fiscal year of the original plan. Furthermore, you must either place the end date in a subsequent year or check the *Ongoing Tactic / Evergreen Tactic* checkbox.
- Close the Inspection Window and switch to one of the views in the Plan module.

The tactic is displayed with the symbol in front of the name. The symbol means that it is a multi-year tactic, but it is not yet linked with all required fiscal years.

- Make sure that a plan is created for each fiscal year to which you want to link the Tactic. The following conditions apply to the plan:

  - The plan must use a compatible model, ideally the same model. If it is a different model, the tactic may not be linked or data may be lost when linking.
  - The plan must have at least one program to which the multi-year tactic can be linked.

- In the multi-year tactic row, click the *Action* button and select *Link to*. Note that in the Calendar View you must first click on the tactic to reach the *Action* button.

The *Linking - Tactic Name* dialog is displayed. If several plans exist for subsequent fiscal years, they will be displayed in the selection list at the top.

- Select the desired plan.
- Select the parent program.
- Click *Confirm*.

The dialog is closed. The tactic is additionally displayed in the plan module below the newly selected parent program.

- If necessary, repeat steps 4 to 7 for each fiscal year you need for the multi-year tactic.

You have assigned the Multi-Year Tactic to a parent program in each required fiscal year.

For a Multi-Year Tactic, if you have linked each required fiscal year, the icon in front of the name will change from to . Note that this may not be possible for an ongoing/evergreen tactic because a plan with corresponding parent programs cannot yet be created for all future fiscal years. If you hover the icons and with the mouse cursor you will get details about the type of linking.

After linking a multi-year tactic to parent programs in other fiscal years, you will see in the tactic's Inspection window the *Point of View* dropdown (above the tactic's name at the top). The dropdown offers the possibility to view the tactic and its data in the corresponding fiscal years. The fiscal year in which the tactic was created is marked with [source].

3.4.4.4 Relating Tactics

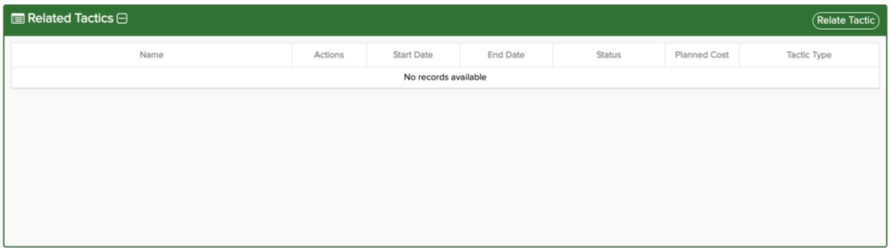
You can relate tactics to map cases where a tactic affects the return of investment of another tactic. This is the case, for example, when you reuse an e-book produced in the last fiscal year in a social media campaign in the current fiscal year.

To map such cases, administrators can create tactic types that are primary tactics (parent). In the above example, the tactic under which the e-book will be produced would be the primary tactic.
All other tactics can be related to primary tactics.

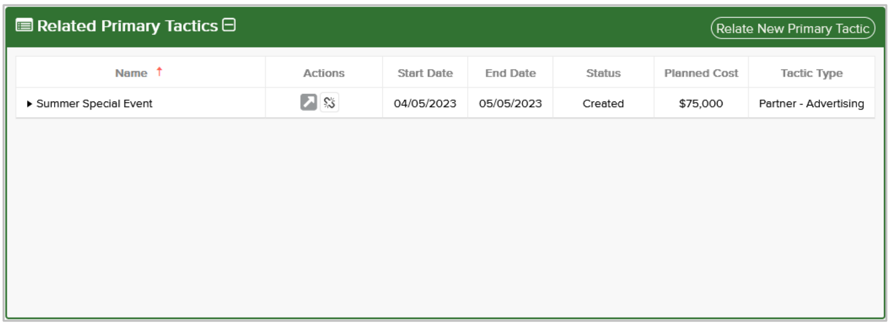
> Note
>
> Depending on your settings in tactic categories, the system may restrict you from relating tactics with incompatible start/end dates. It is not possible to relate tactics that do not occur within the same time period.

How to Recognize a Primary Tactic

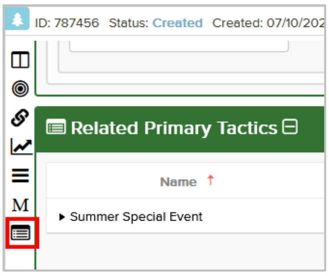
You can determine whether a tactic is a primary tactic in the Inspection Window. Primary tactics have a *Related Tactics* section:



The comparable section for other tactics is called *Related Primary Tactics*.



You can quickly navigate to these sections within the Inspection Window via the  icon in the left bar.



Relating Tactics

- Click > *Menu* > *Plan*.
- Set your filters to display the plan in which you want to relate tactics.
- Open the Inspection Window of the tactic and go to *Related Tactics* or *Related Primary Tactics* section.
- Click *Relate Tactic* or *Relate Primary Tactic*.
- A dialog is opened.

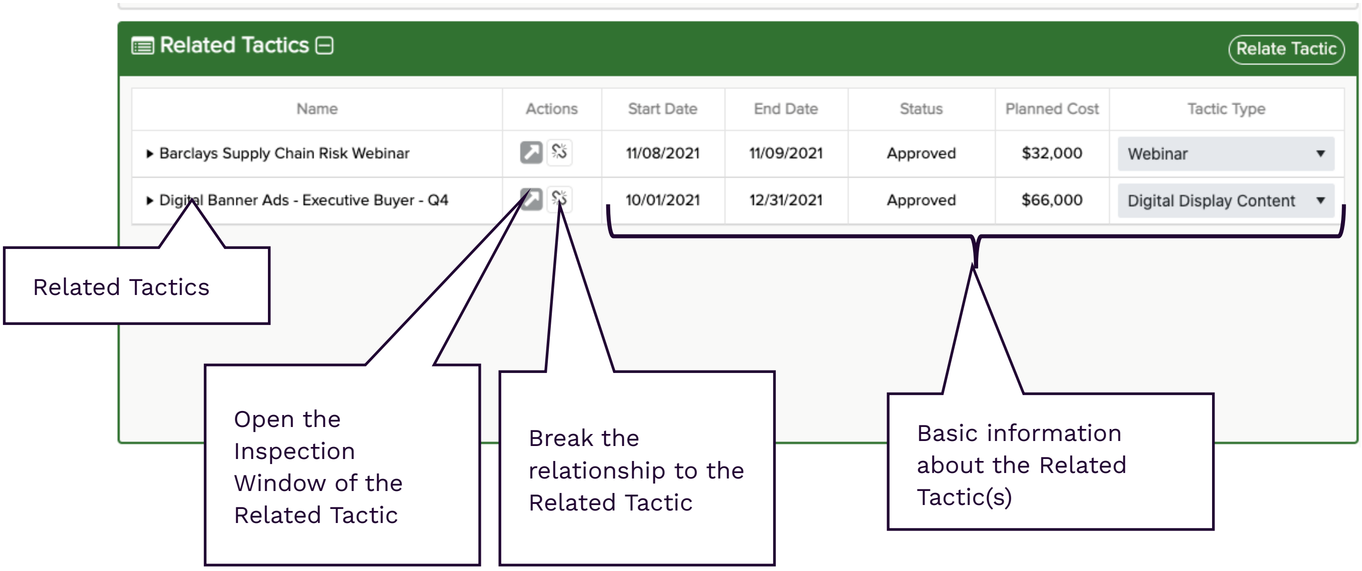
- In the *Year* dropdown, select the year to which you want to relate.
- In the *Plan* dropdown, select the parent plan of the tactic to be related.
- In the first column, select the parent campaign of the tactic to be related.
- In the second column, select the parent program.
- In the third column, select the tactic to be related.
- In case you want to relate to the tactic including all line items, click ✚ for the tactic.
- In case you want to include a selected line item, click ✚ for all line items to be included.
- Click *Save*.

You have related the tactics.

Other Actions

From the *Related (Primary) Tactics* section, the user may also:

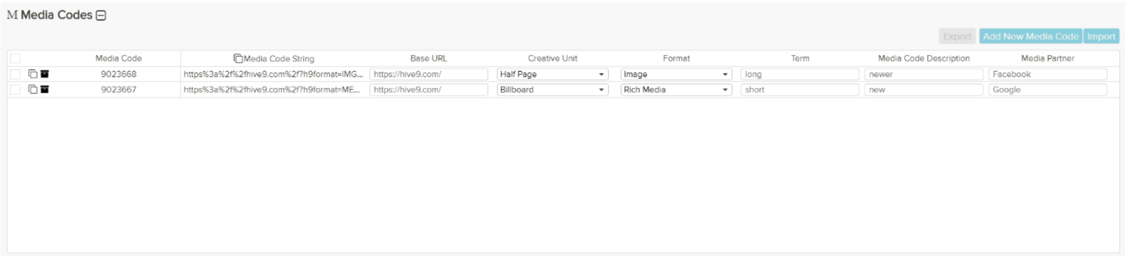
- Open the Inspection Window of the related (primary) tactic by clicking
- Break the relationship to the related (primary) tactic by clicking
- See basic information about the related (primary) tactic



3.4.4.5 Media Code Management

The ability to create a unique code(s) per promotion tactic to be used as a value in a custom URL. Example custom URL – http://mywebsite.com/?mediacode=9000036 – Note: Similar to a Google UTM

The Media Code can have custom attributes to provide reporting flexibility. Example – Creative Unit, Format, Vendor, Description, etc.



3.4.5 Line Items

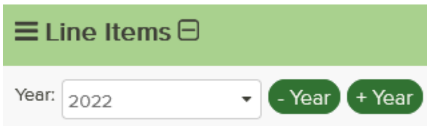
A line item is a child object of a Tactic. Line items are where you see your spend cost. It's the detail of how you're going to spend the money for your tactics. You will track your actual spend in the line item.

Total Time Period

The allocation of line item costs are not tied to the period of the parent tactic. When creating a tactic, the associated fiscal year is initially displayed in the Line Items section of the Tactic Inspection Window. However, you can append preceding or subsequent fiscal years if costs are incurred in the years before or after the parent tactic fiscal year.

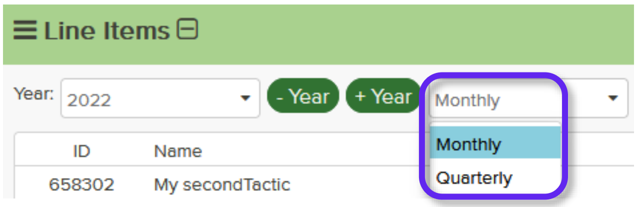
To add additional years, click on the parent tactic's Inspection Window in the *Line Item* section:

- - Year: You add a preceding year.
- + Year: You add a subsequent year.

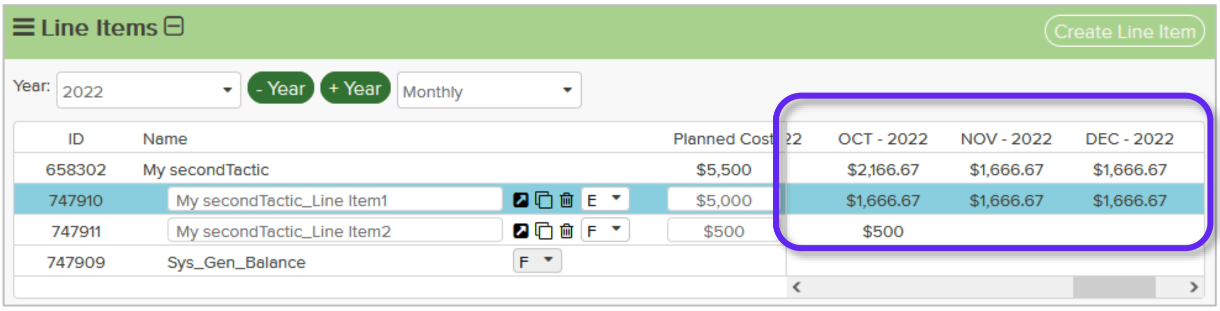


Time Segments

When creating the line items, you specify a total amount. This total amount can be allocated either monthly or quarterly. You select the time segments in the parent tactic's Inspection Window in the *Line Item* section:



Your selection sets the display of the allocation area:



Mechanisms

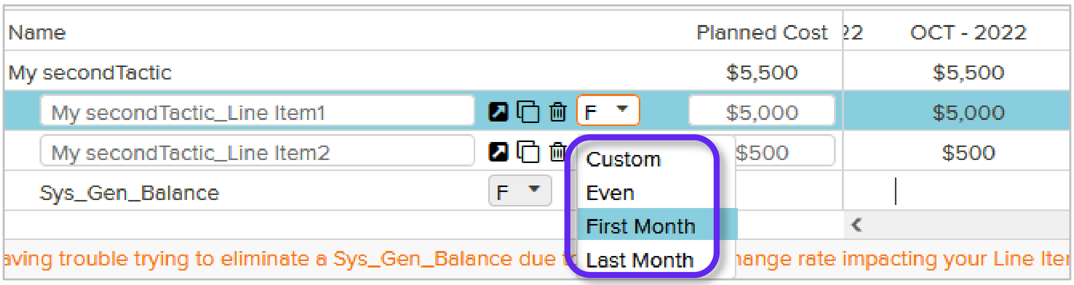
For the distribution of the total amount to the time segments, the system provides you with the following mechanisms to choose from:

- *C=Custom*; You allocate the total amount manually among the time segments. This mechanism allows you the most flexibility to allocate the costs, but it can be hard to use when there are many time periods.

> Note: You can prevent users from leaving an unallocated amount on a Line Item under "Organizational Setup".

- *F=First Month*; In default allocation, all costs will be allocated to the start month/quarter of the parent tactic. If you customize the default allocation and enable multiple years, the total cost will be written to the first month/quarter of the first year.
- *L=Last Month*; In default allocation, all costs will be allocated to the last month/quarter of the parent tactic. If you customize the default allocation and enable multiple years, the total cost will be written to the last month/quarter of the last year.

- *E=Evenly Distributed*; In default allocation, the costs are evenly allocated by month/quarter equally to the time segments within the parent tactic's duration. If multiple years are activated for the line items, then the costs are evenly allocated by month/quarter to the time segments within all years.



The default allocation mechanism is defined at plan level in the Plan Inspection Window.

> Note
>
> If the parent tactic is evergreen/ongoing, you cannot use the *Last Month* and *Evenly Distributed* mechanisms.
> If the plan specifies such a default allocation for line items of an evergreen tactic, the total amount is entered in the first month/quarter. If this does not match your plan, switch to the custom mechanism and enter the costs according to your needs.

System Generated Balance

Sys_Gen Balance means *System Generated Balance* and is there to be used as a visual cue if your line item amounts equate to tactic planned cost. If you employ line items, your goal is $0 for Sys_Gen Balance.

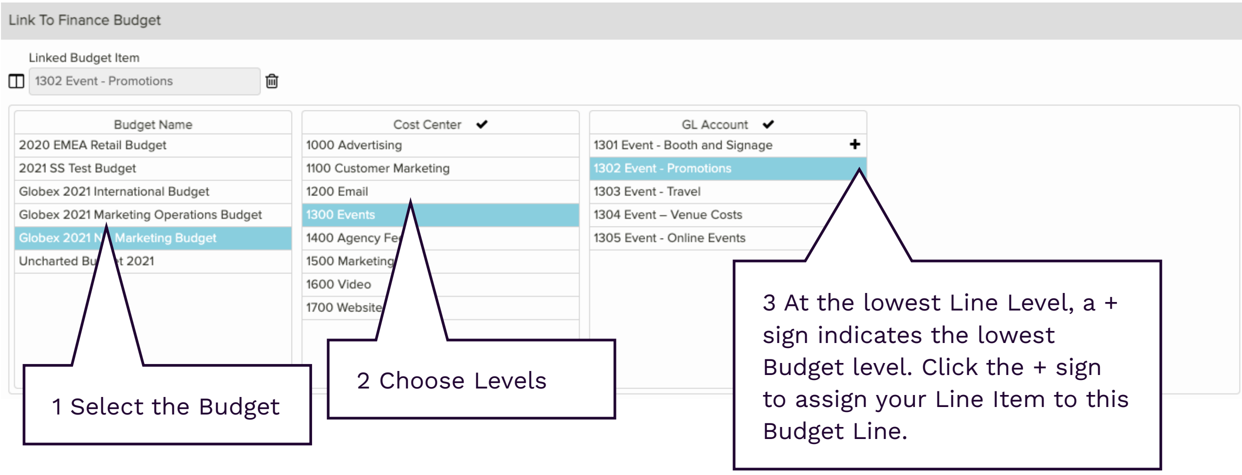
> Note
>
> A negative "Sys_Gen_Balance" can be prevented in the Model settings, see chapter 10.12.1.

Linking to Finance Budget

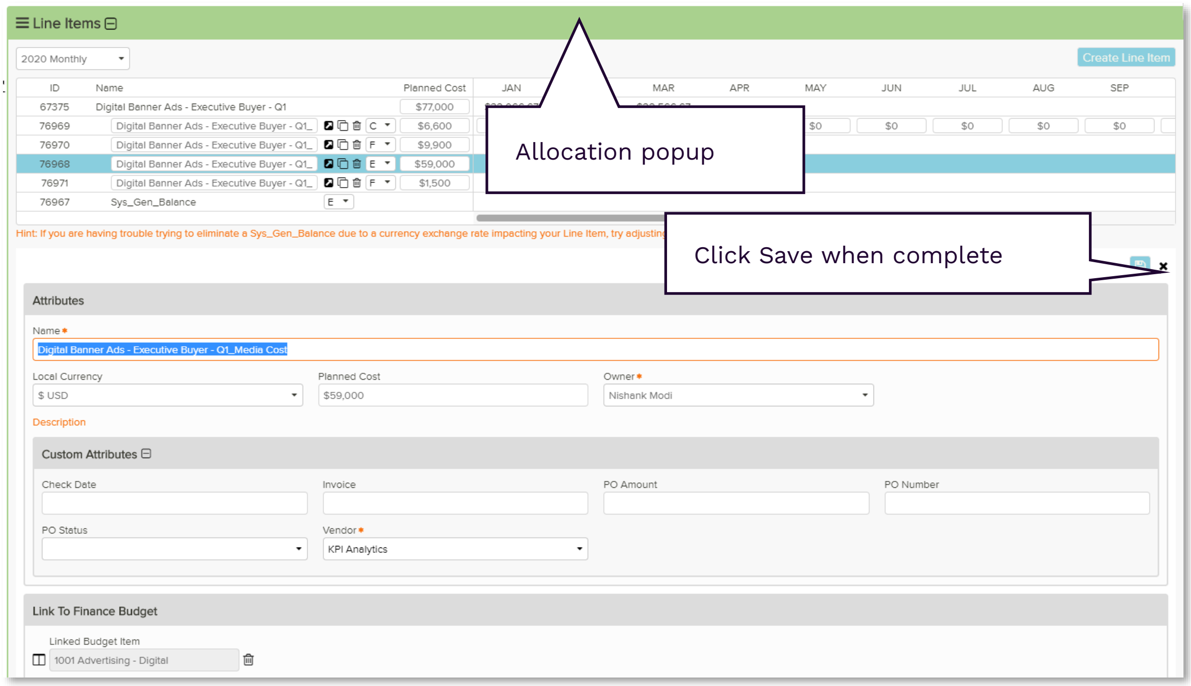
Use the *Link to Finance Budget* section to link the Line Item to the specific budget.

> **Note**
>
> If you do not link to a specific budget, then the amount of the Line Item will be shown in the Sys_Gen Balance section of the associated Finance Budget.

If planned costs are allocated for the line items of a tactic in several fiscal years, you can also link to finance budgets separately for each year. Therefore, first select the fiscal year for which you want to create a link and then the budget as described below.



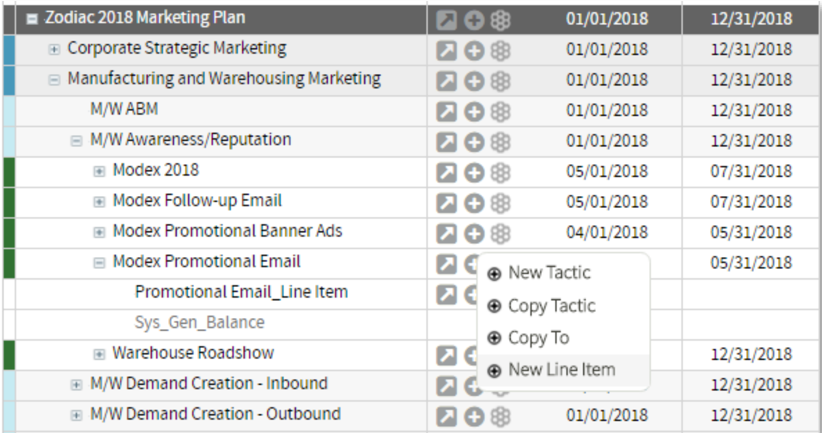
When allocating a Line item’s cost to a Budget row that has a Hard Stop Limit, the user needs to use the Allocation popup and allocate amounts in the popup window. Click Save when the user has completed the allocation.



3.4.5.1 Add Line Item

- To add a line item, select one of the following options:

- In one of the main views, click the Action Icon of the parent tactic or a sibling line item. Select *New Line Item*:



- In the parent tactic's Inspection window and in the Line Item Section, click *Create Line Item*.

The *Line Item Attributes* section is opened in the parent tactic's Inspection window.

- Edit the name.
  As default name, *Parent-Tactic-Name*_Line Item is entered.
- Set the currency.
- Enter the planned costs.
- Optional: Change the owner.
- Optional: Edit custom attributes.
- Click *Save*.

You have added a line item. The planned costs will be allocated according to the default mechanism.

3.4.5.2Allocate Costs

The default allocation is always executed based on a rule for the duration of the parent tactic, and may have to be adjusted to real conditions. This is especially true if costs are incurred in preceding or subsequent years.

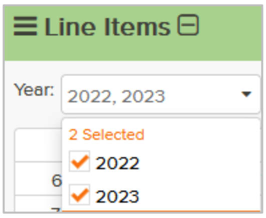
Prerequisite: You have created a line item.

- Open the parent Tactic's Inspection window and go to the *Line Item* section.
- If costs are incurred outside the parent tactic's fiscal year, select each year needed. Click:

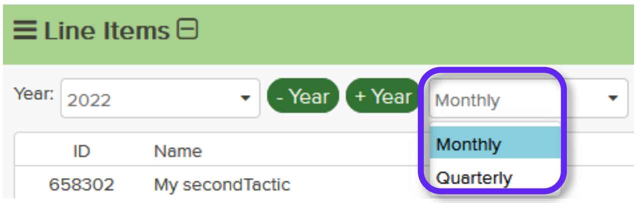
- *- Year*: You add a preceding year.
- *+ Year*: You add a subsequent year.

Note: Adding a year may convert the parent tactic to a multi-year tactic. This conversion cannot be reversed.

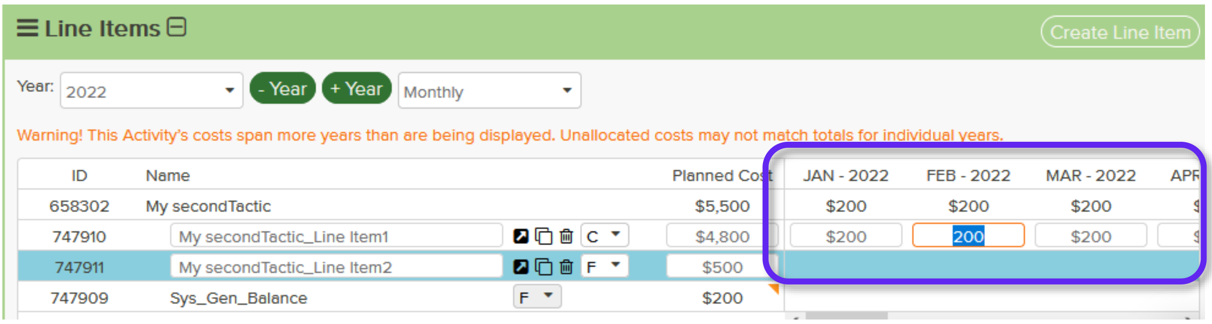
- To display all years, activate the checkboxes in the *Year* selection list.



- Decide whether you want to allocate monthly or quarterly.



- Select the mechanism you need for line item you want to adopt.
- If you want to edit the planned costs manually, enter the desired amounts:



You have allocated the costs.

3.4.6 Assigning Teams to Plans

In order for users to gain access to Plans content, users must belong to a team that is assigned to a Plan. Once a team is assigned to a Plan, a user's role will further determine the actions that the user can complete inside the Plan.

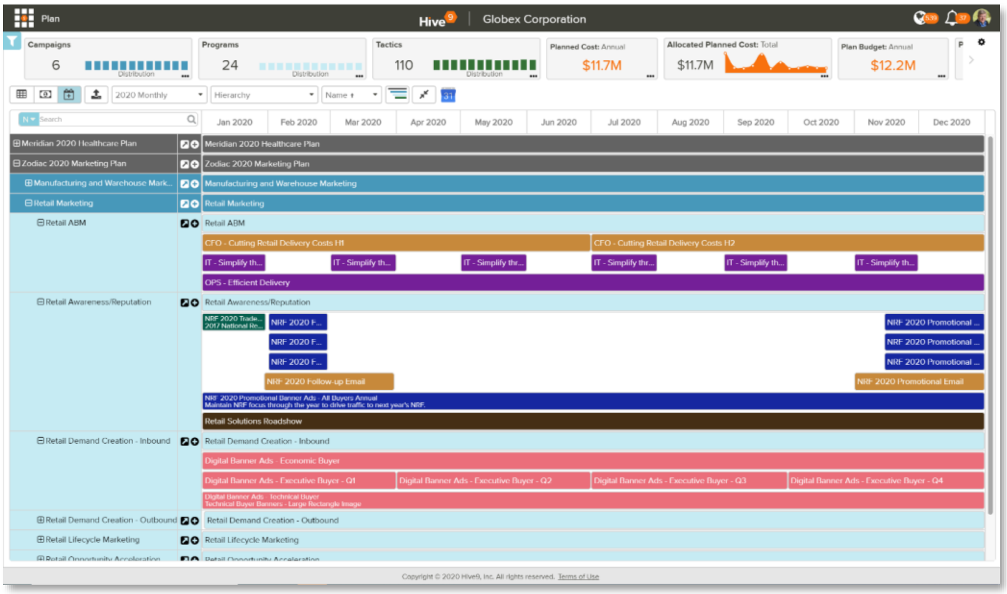
Assign team(s) to a Plan

- Open the plan *Inspection Window* to the plan that you want to assign a Team to.
- Under the *Setup* section, use the dropdown to select the Team(s) that you want to have access to the plan.
- Click *Save*.

Plans can have multiple teams assigned; however, the owner of the plan must belong to one of the teams. When multiple teams are added to a plan, Team collaboration rules and user permissions will further determine the actions that users can take inside the Plan.

3.5 Calendar View

- A visual representation of your plan
- Default view of Plan
- Bar Colors
  - Plan = Black
  - Campaign = Dark Blue
  - Program = Light Blue
  - Tactic = Multiple Colors – Client configured in Theme Settings

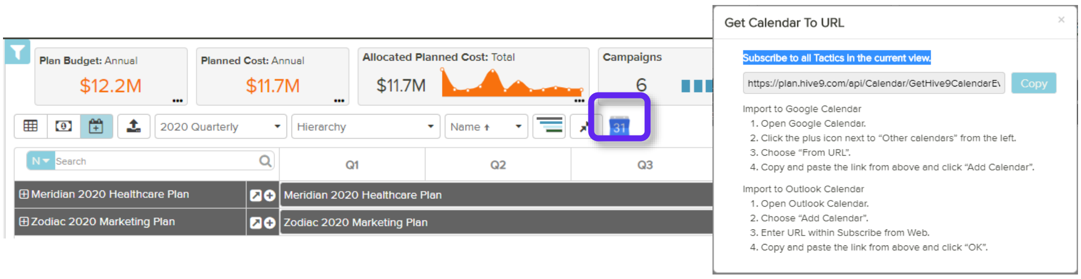


Users can drag and drop tactics from one place in the calendar to another.

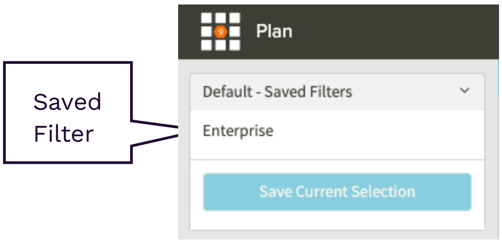
The Tactic Elements to include in the pop-up are configured in Theme Settings, see chapter 10.9.

3.5.1 Calendar Synchronization

If purchased, your customer success team will turn on calendar synchronization for you in the system settings. Once enabled, any saved calendar views that you have created will be available for sharing.



To Export to your Outlook or Google Calendar, you must first set up at least one Saved Filter in the Filter Column. Then select one of the saved filters.

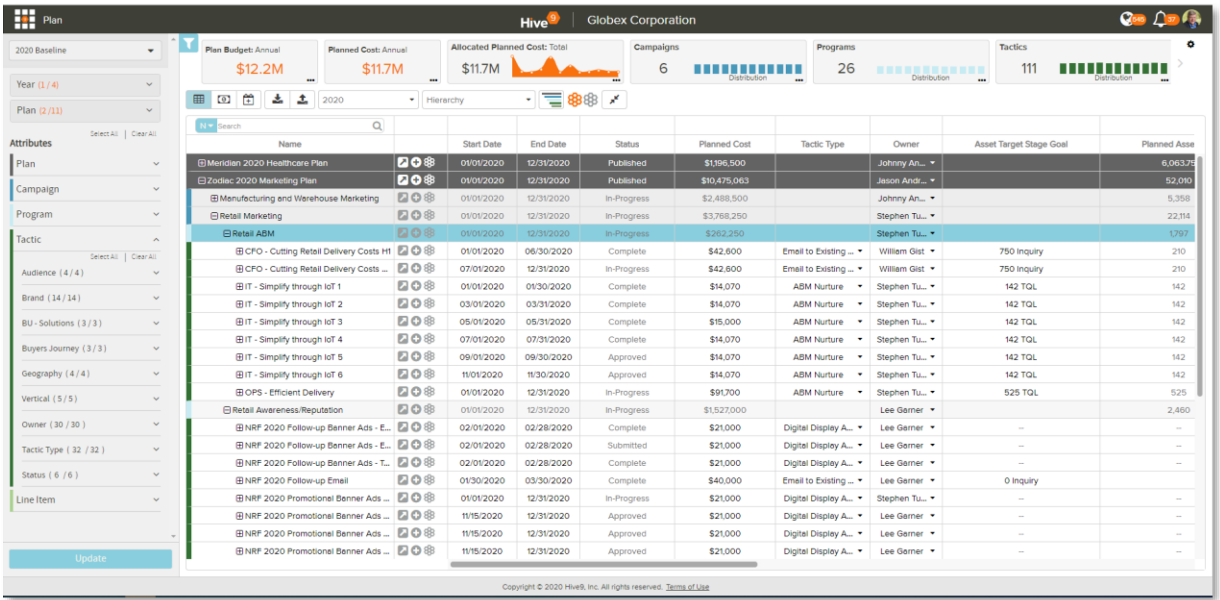


Next, simply click the calendar icon to see the link to use when subscribing to the calendar in either google or outlook. Instructions are provided. Published calendars are synchronized each night with any changes to the plan.

3.6 Grid View

- The default view of your plan
- A more data-centric view of your plan
- Allows you to sort columns by ascending or descending views. Note, that Campaign structure will be upheld in sorting.
- Numbers roll up in the hierarchy, even for custom and formula attributes
- Drag and drop columns to where you want them to be
- Some cells can be edited directly: Cells that have a darker gray font (versus light gray) can be edited.

Note: You cannot make multi-select choices in the grid view and not all dependencies will be available

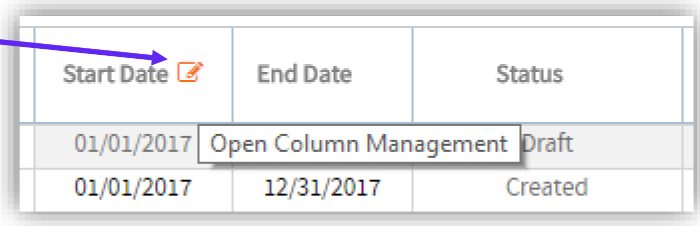


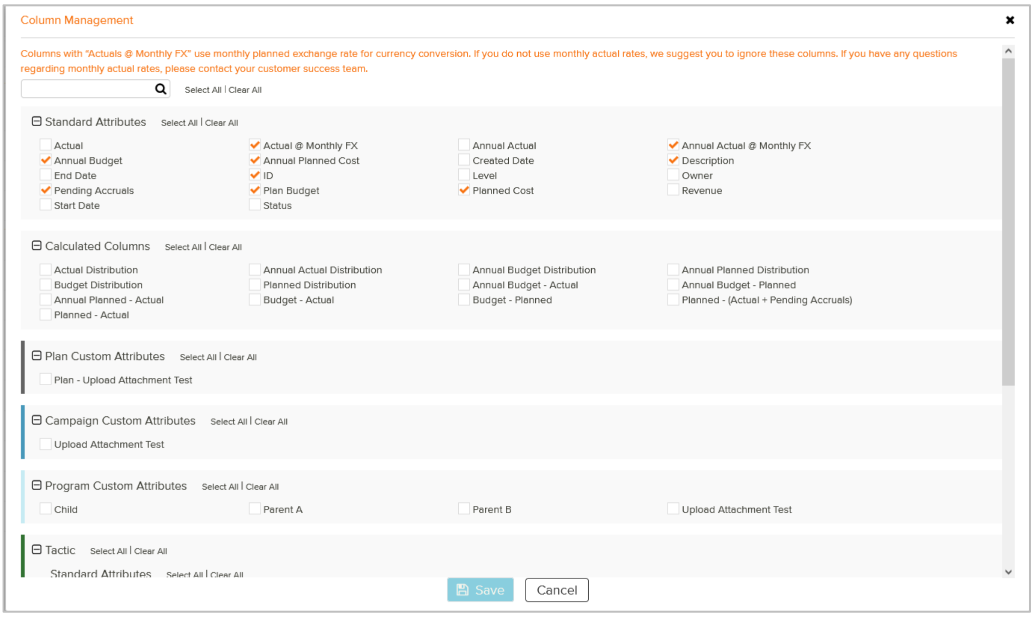
3.6.1 Column Management

You can choose which columns are shown to personalize your view.

- Changes are saved between sessions.
- Viewable Attributes are segregated by (scroll to see all Attributes):
  - Standard Attributes
  - Campaign Custom Attributes
  - Program Custom Attributes
  - Tactic Custom Attributes
  - Line Item Custom Attributes (if applicable)

Hover to reveal Column Management Icon. Click to open Column Management Window.



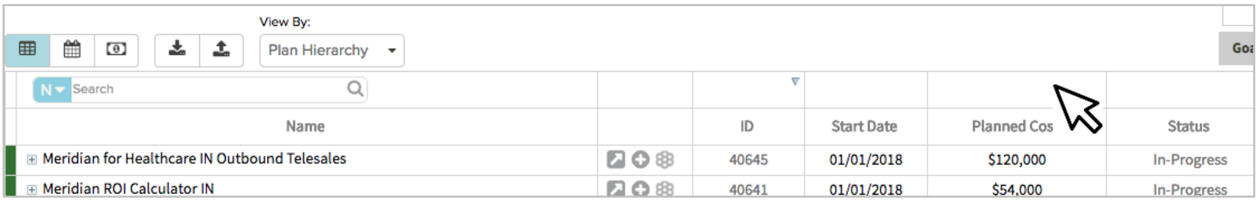


Note that the list of attributes can be very extensive and therefore may not fit on your screen. Scroll down to see all attributes.

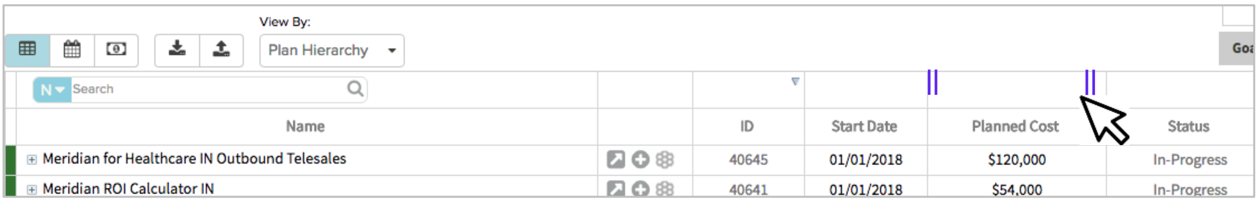
3.6.2 Arrange Columns the Way You Want

The columns selected in Column Management will display in a default order. However, you may choose to move columns around to suit your needs. To arrange column order:

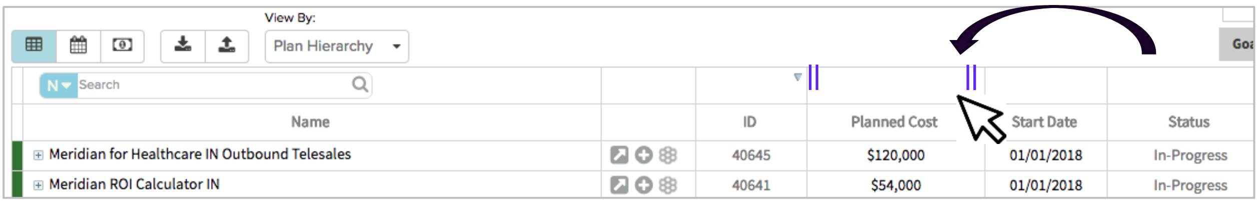
In the row above the column headers, click and hold your cursor over the empty cell.



You will notice a set of orange bars will appear at the left and right edges of the cell.



While holding down the cursor, drag the column to where you want it and release the cursor.



The column will remain in this position until you change the columns viewed or move it again.

Note

In Budget & Cost view, only custom columns can be rearranged. Standard columns such as Monthly View, Quarterly View, and other default columns remain in a fixed order. These standard columns always appear before the custom attributes' columns.

3.6.3 Line Item Selection and Display Options

The Plan Grid now offers enhanced control over line item selection and display through the “Hierarchy Viewer.” This feature helps you to focus specifically on line items while managing your plans.

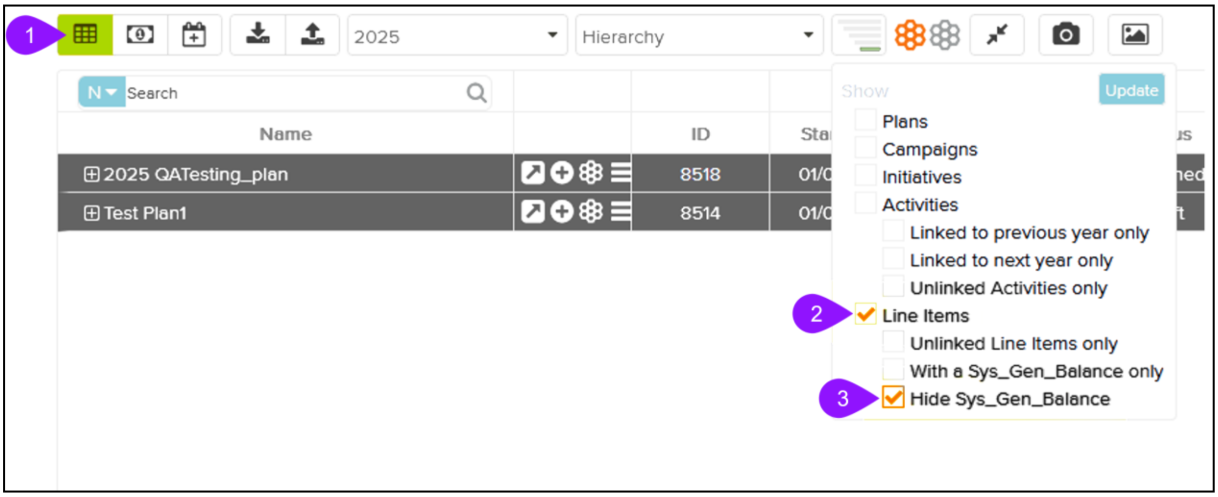
Plan Grid Options

In the Plan Grid, you can now:

- Select and view only line items and exclude all other hierarchy levels
- Choose how system-generated balance entries are displayed

To use these features:

1. Click the “Hierarchy Viewer” option in the control panel.
2. Under “Line Items,” you'll find three mutually exclusive options:
    - Show all line items (default)
    - Show line items with details
    - Hide Sys_Gen_Balance (shows only Non-Sys_Gen_Balance line items)



> **Note**
>
> These options work like radio buttons. You can only select one at a time.

Budget & Cost Grid Considerations

The Budget & Cost Grid handles line item selection differently:

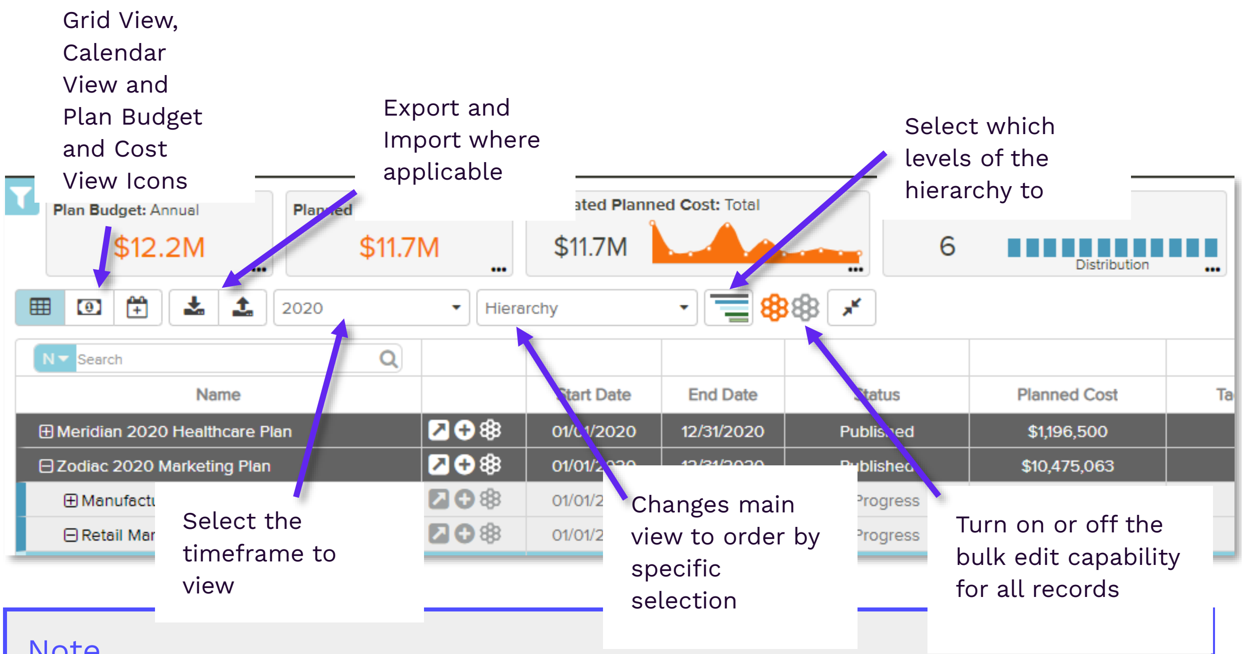
- You must select a parent object (Plan, Campaign, Initiative, or Activity) to view the grid.

- If you try to access the B&C Grid with "ONLY Line Items" selected in the Plan Grid, you'll see this message: *"In order to view the Budget & Cost Grid, you must select a Parent Object: e.g., Plans, Campaigns, Initiatives, Activities."*

Best Practices:

- Use line item-only selection in the Plan Grid when focusing on specific cost entries.
- Remember to select appropriate parent objects before switching to the B&C Grid.
- Use the "Hide Sys_Gen_Balance" option when you need to focus on manually created line items.

3.7 Workspace Control Panel



> **Note**
>
> You may also see the buttons for taking snapshot ( ) and accessing snapshot gallery ( ) if your role is eligible to perform the according actions. In case of questions contact your administrator.

Search

Search functionality can be used to find specific activity based on search parameters at the beginning of the search field: e.g.., Activity Name, External Name and Hive9 ID.

A search will also return the upper level portions of the campaign hierarchy associated with the searched activity to provide the appropriate context.

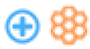
Export and Import

- The Grid View exports in XSLX format
- The Calendar View exports in PDF format
- The file will be made available via your browser’s normal download functionality
- Imports will require download and use of a template

3.8 Honeycomb – Bulk Actions

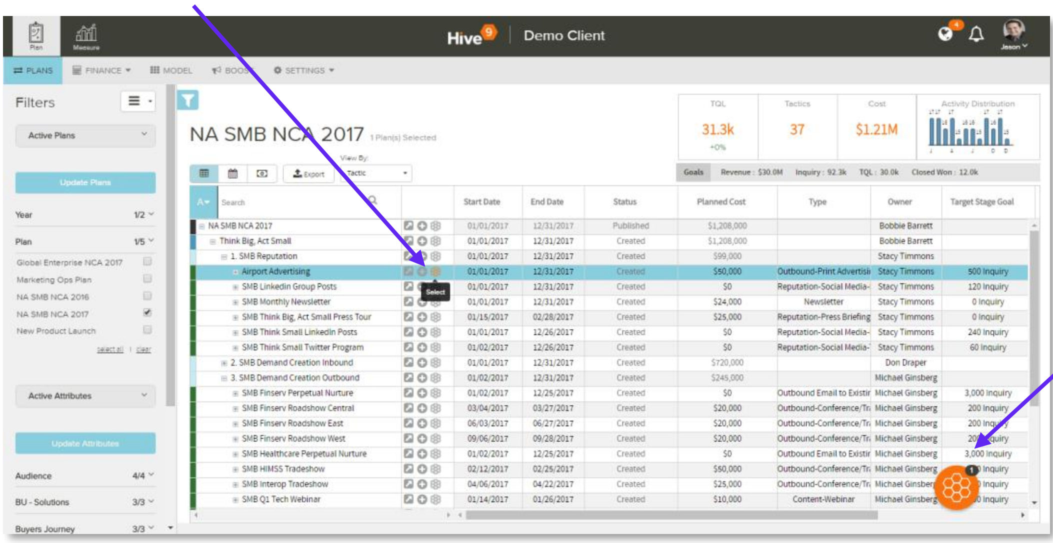
The Honeycomb enables the user to specifically choose a Campaign, Program, Tactic and/or Tactic line item from a Plan and perform a bulk action on that group.

- Click the Honeycomb icon next to the Action Icon in the Calendar and Grid

 Honeycomb off  Honeycomb on

- As soon the Honeycomb icon is pressed, a new, larger honeycomb icon will display in the lower right-hand corner of the screen.

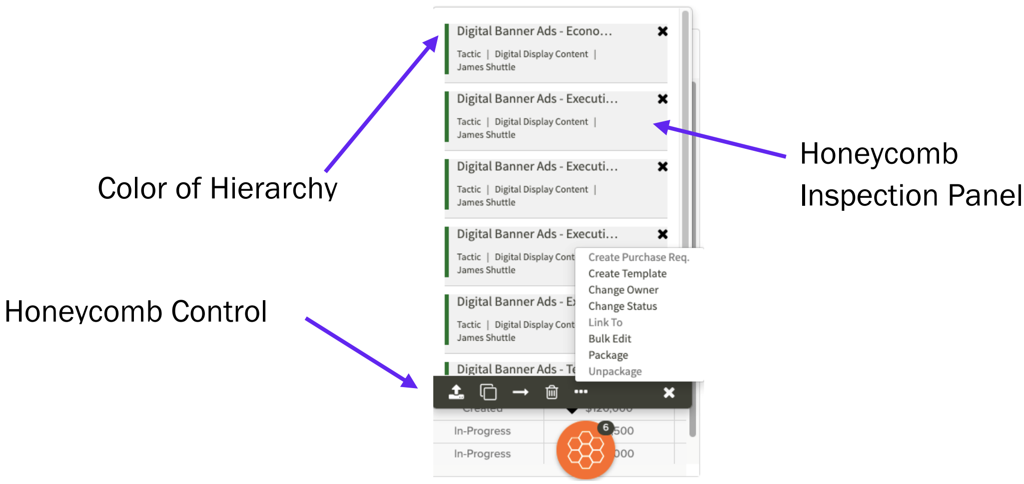
Honeycomb



Large Honeycomb with a number of selected activities

Click the large Honeycomb icon to get to the Honeycomb Inspection Panel

3.8.1 Honeycomb Panel



3.8.2 Export

The Export icon allows you to export the calendar (PDF) or grid (CSV). The activities selected will stay in the Export Inspection Panel until they are deleted with the Trash icon in the lower right of the Export Inspection Panel

> Note
>
> PDF exports may get blocked by pop-up blockers.

3.8.2.1 Copy, Move and Delete

Only like activity can be copied or moved (moves require selected items to be of the same type). Delete of a Parent item (e.g., Campaign, Program) will delete all child items.

3.8.2.2 Create Purchase Req.

Enables the user to create a single purchase requisition for a single vendor with a purchase requisition line for each line item in the Honeycomb selection. You must select at least one line item to activate this option.

3.8.2.3 Create Template

Enables the user to create a template of the selected item or items. This enables the future creation of similar items or groups of items to be streamlined using the pre-filled template. Templates may have some or all of the attributes of the template items completed. Templates are available only to the user who created them.

3.8.2.4 Change Owner or Status

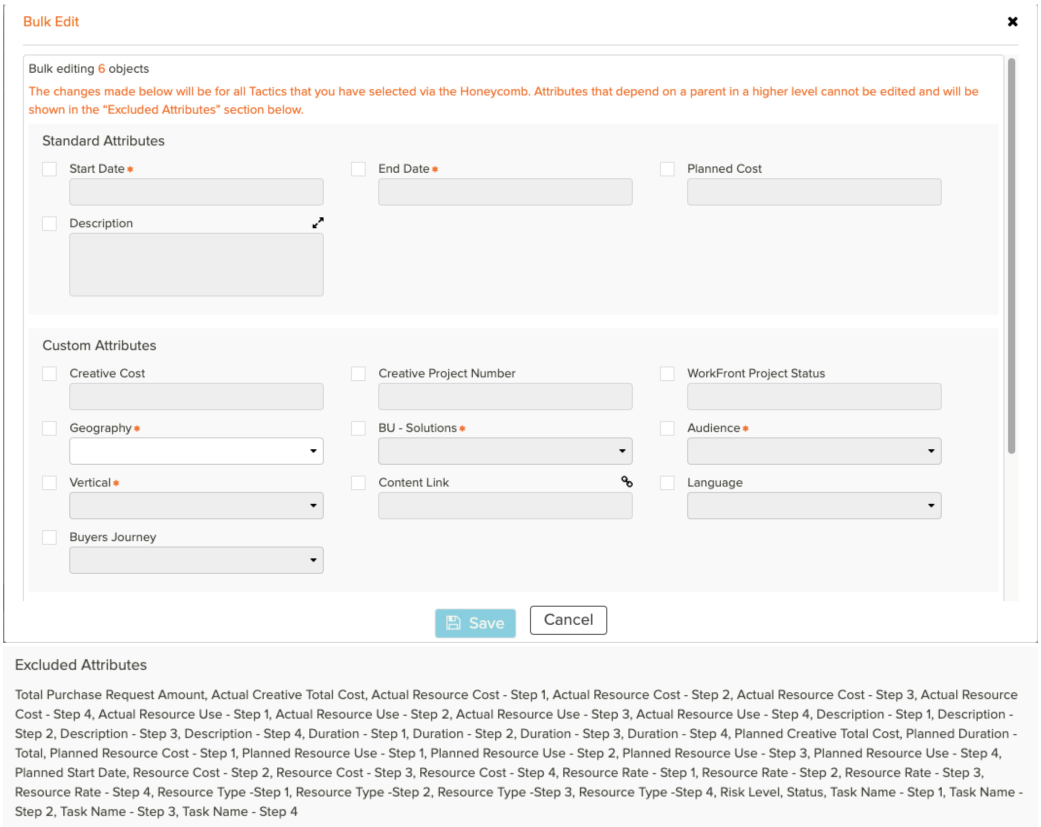
This allows for bulk changes of owner or Status, such as moving Tactics from a status to Approved. User must have permission to Approve Tactics to bulk approve them.

3.8.2.5 Link to

Allows bulk linking of Tactics across Plans of a different year. All selected Tactics should be in the same Program in both calendar year Plans.

3.8.2.6 Bulk Edit

Allows bulk editing of Tactic attributes for all Tactics selected in the Honeycomb. Tactics must be of like Tactic Type and some other conditions apply. Once selected, an Inspection Window will open, displaying all possible Attributes that may be changed. First, select the checkbox beside the Tactic. Then, edit the value to change all the selected Tactic values. For example, clicking the checkbox next to Start Date allows the user to enter a new Start Date. Note that all selected Tactics will change to the same chosen Start Date. Also note that a list of Attributes that may not be Bulk edited is listed at the bottom of the Inspection Window. Once the value(s) are selected, click Save to complete the Bulk Edit.



3.8.2.7ROI Package or Unpackage

Used to create a specific package of tactics in a Program. Unpackage reverses the packaging. See your Hive9 Customer Success Manager for more information.

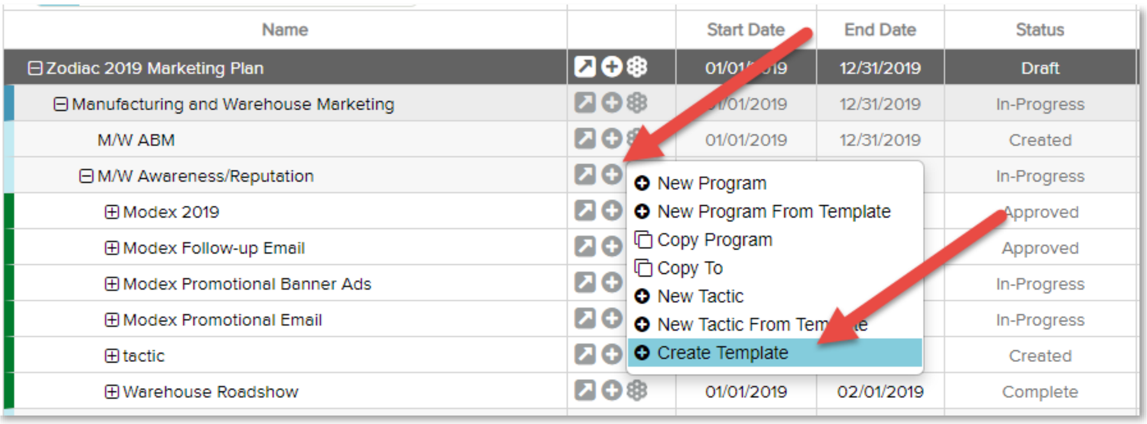
3.9 Templates

Templates are available to assist users in creating Plans, Campaigns, Program, and Tactics that are most often created by the user.

Templates reduce the time of creating these items from scratch by allowing Attributes, links to Finance Budget, Custom Goals, etc., to be saved within the defined Template.

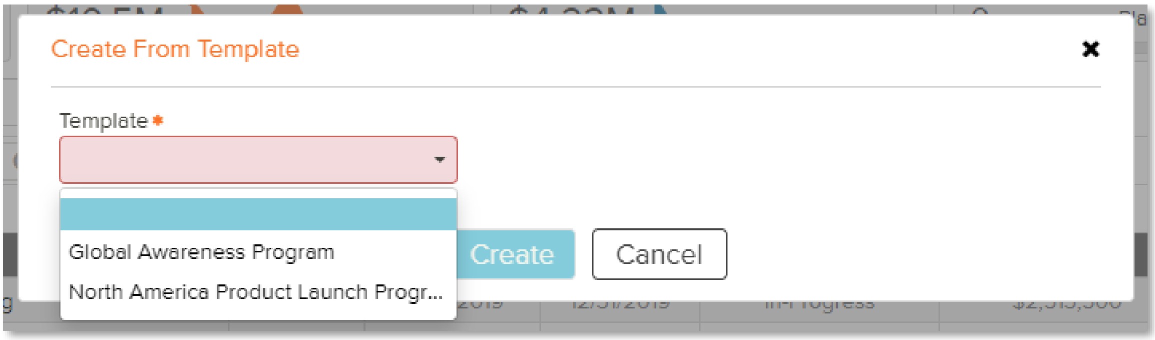
Currently, templates are created at and saved at a user level.

A template is created by using the Action icon at the level of hierarchy you want the template to exist. A template created at a parent hierarchy level will include all children objects within that template and all chosen attribute values within those objects. A template will require a name for future use. Templates can only be created from the main Grid View



3.9.1 Creating Objects from Templates

- Choose the Action icon at the level of hierarchy you want to create.
- Choose the *New XXXX From Template* option.
- Choose the template you want to deploy from the template list and press Create.

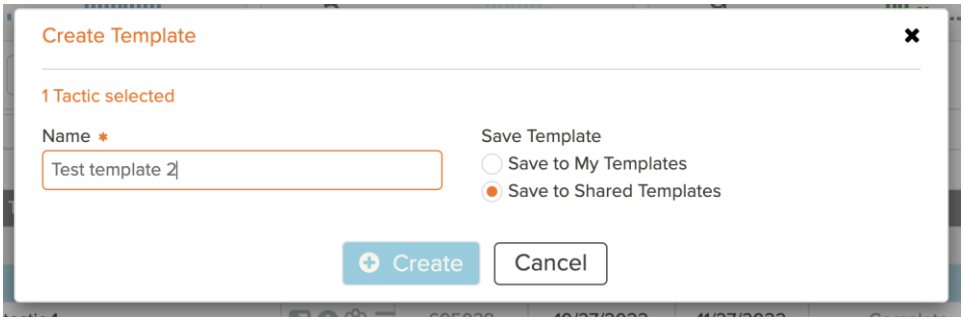


3.9.2 Sharing Templates

You can save templates as either personal ("My Templates") or “Shared Templates”, making them available to other users in your Hive9 instance.

To share a template:

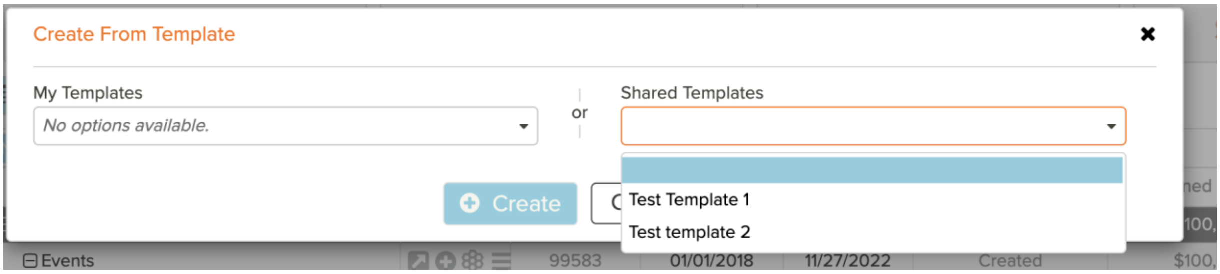
1. Create your tactic structure in the Plan Grid
2. Click the Action icon and select *Create Template*
3. In the *Create Template* dialog:
    - Enter a descriptive name for the template
    - Select *Save to Shared Templates* option (instead *of Save to My Templates*)



    - Click *Create*

To use a shared template:

1. Click the Action icon and select *New [Item] From Template*
2. In the *Create From Template* dialog, you'll see two sections:
    - *My Templates*: Your personal templates
    - *Shared Templates*: Templates shared by other users



3. Select your desired template from either section
4. Click *Create* to apply the template

> Note: You must have appropriate permissions to save Shared Templates. Contact your administrator if you don't see the sharing option.

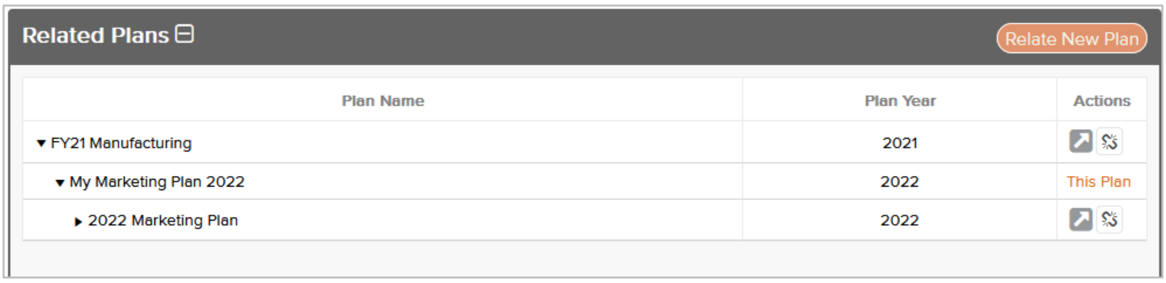
3.10 Relate Plans

Related Plans functionality allows users to relate one plan with another. This way, when a user navigates to the Inspection window of a plan, they can see in the Inspection window itself which other plans are related to the current plan. Please note that the child entities of related plans will not be related to each other.

> Note
>
> This is an optional feature that might not be activated in your system. For more information see chapter 10.8.13 or contact your system administrator.

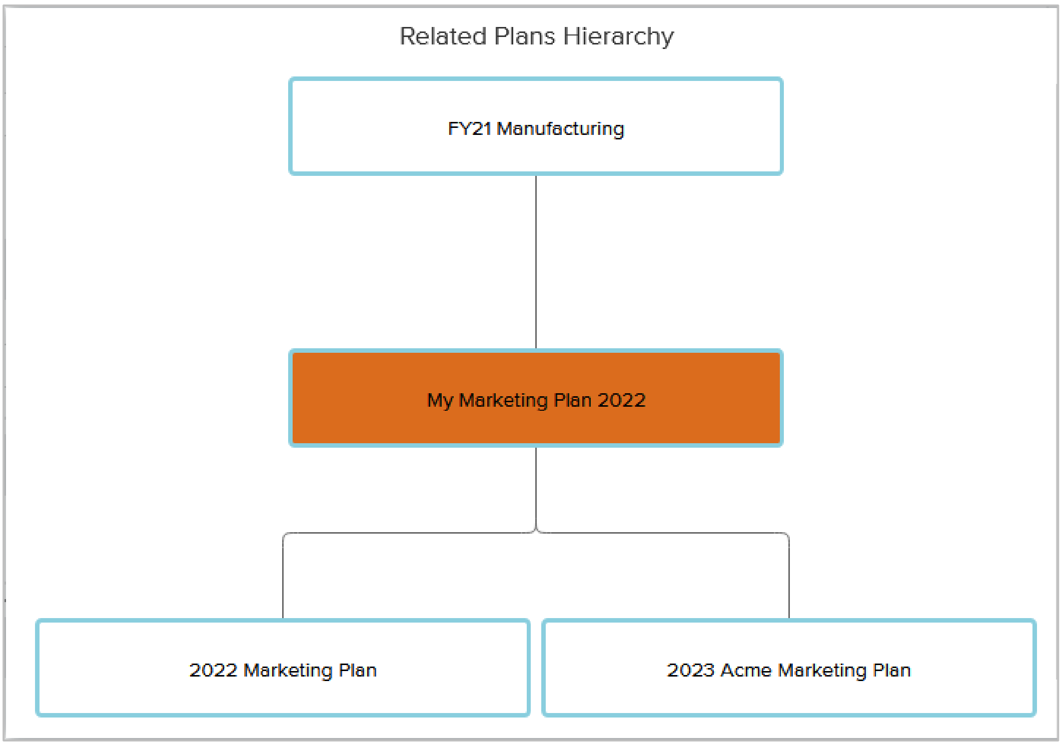
When the feature is turned on, a *Related Plans* grid is shown in a plan's Inspection Window.

In case the plan is not yet related to other plans, the grid is empty. The following screenshot shows a plan that is related to one parent and one child plan.



> Note
>
> Circular references aren't allowed. Circular reference means that a plan cannot be a child of its grandfather. Similarly, a grandfather cannot be related to any of its grandchild plans.
>
> For example: if there are 3 related plans: Plan A > Plan B > Plan C. In this case Plan A and Plan C cannot be related to each other.

To quickly understand the relationships between the plans, there is also a *Plan Relationship Visual*. In a plan's Inspection Window in the top-right corner, the user clicks to open the visual:



The orange plan is the one in which the visual is opened. By clicking on the other plans, the user jumps directly to the Inspection Window of the respective plan.

3.10.1 Relating Plans

> Note
>
> By following the action steps, you can link one or more plans to the initial plan either as children or as parents. To link the source plan in the other relationship direction, repeat the entire process with the setting changed accordingly.

- Click > *Menu* > *Plan*.
- Set your filters to display the plan you want to link to in the main grid.
- Open the Inspection Window of the plan and go to *Related Plans* section.
- Click *Relate New Plan*.

The *Relate Plan* dialog is shown.

- In the *Relate As* field, decide whether the plans to which you want to link to are parents or children of the current plan whose Inspection Window you opened.
- Select the fiscal year you want to link to.

The plans that are assigned to the fiscal year and to which you have access are displayed.

- Click ✚ for those plans you want to link.

The plans are displayed in the table in the upper part of the dialog.

- If you want to link plans in other fiscal years: Repeat steps 6 and 7 for every plan you want to link with the same relationship (child/parent).
- Click *Save*.

You have related plans, either as children or as parents.

3.10.2 Unrelating Plans

- Click > *Menu* > *Plan*.
- Set your filters to display the plan whose relation you want to unlink.
- Open the Inspection Window of the plan and go to *Related Plans* section.
- In the *Actions* column and inline with the plan you want to unlink, click .

A security prompt is displayed.

- Click *Yes*.

You have unrelated the selected plan from the current plan.

3.10.3 Navigating Related Plans

- Click > *Menu* > *Plan*.
- Set your filters to display the plan from which you want to navigate to other plans.
- Open the Inspection Window of the plan.
- If you want to navigate starting from a visual overview:

a. In the top-right corner of the Inspection Window, click .

- A visual of the related plans is displayed. The orange plan is the one whose Inspection Window is already open.

b. Click on the plan to which you want to navigate.

- The Inspection Window of the target plan opens.

- If you want to navigate starting in the overview table in the *Related Plans* section:

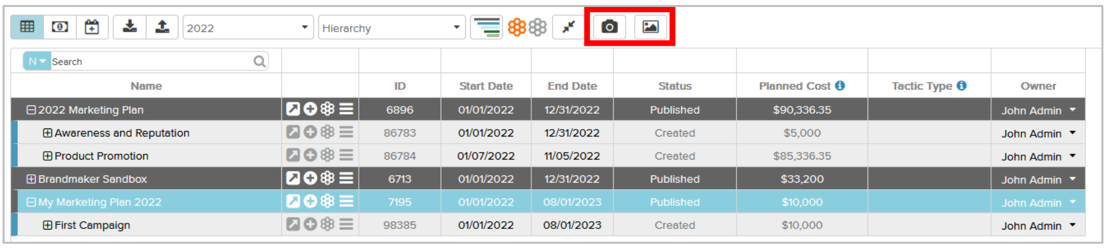
a. In the *Actions* column and inline with the plan you want to navigate to, click .

- The Inspection Window of the target plan opens.

You have navigated related plans.

3.11 Plan Snapshots

You can take snapshots of the Plan Grid, Budget & Cost Grid or Calendar View. The icons for taking snapshot ( ) and accessing snapshot gallery ( ) are now shown in the Plan view:



Name		ID	Start Date	End Date	Status	Planned Cost	Tactic Type	Owner
2022 Marketing Plan		6896	01/01/2022	12/31/2022	Published	$90,336.35		John Admin
Awareness and Reputation		86783	01/01/2022	12/31/2022	Created	$5,000		John Admin
Product Promotion		86784	01/07/2022	11/05/2022	Created	$85,336.35		John Admin
Brandmaker Sandbox		6713	01/01/2022	12/31/2022	Published	$33,200		John Admin
My Marketing Plan 2022		7195	01/01/2022	08/01/2023	Published	$10,000		John Admin
First Campaign		98385	01/01/2022	08/01/2023	Created	$10,000		John Admin

> **Note**
>
> You can only see the icons for taking snapshot ( ) and accessing the snapshot gallery ( ) if your role is eligible to perform the according actions. In case of questions, contact your administrator.

How Plan Snapshots Work

Snapshots are taken based on only *Plan Year* and *Plans* selected in the left filters. No other filters will be applied.

> Example
>
> You have selected 3 plans and each plan has 20 activities. After applying other filters in the left panel, grid loads only 10 activities under each plan. Now, you take a snapshot.
> When you load that snapshot in the gallery, all 20 activities under each plan will be displayed.

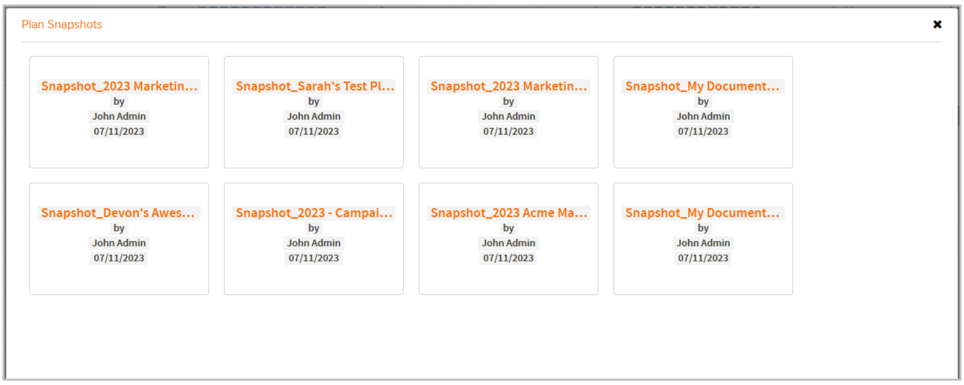
A snapshot considers the exchange rate based on the date of the snapshot, and the Heads-Up Display will not be shown when loading a snapshot from gallery.

For all plan views, a snapshot will be loaded based on the last *View By* and *Timeframe*, as well as with columns that the user had selected under *Column Management* before saving the snapshot. As the whole plan is snapshotted, a user can change the columns and *View By* and *Timeframe* settings when loading the snapshot.

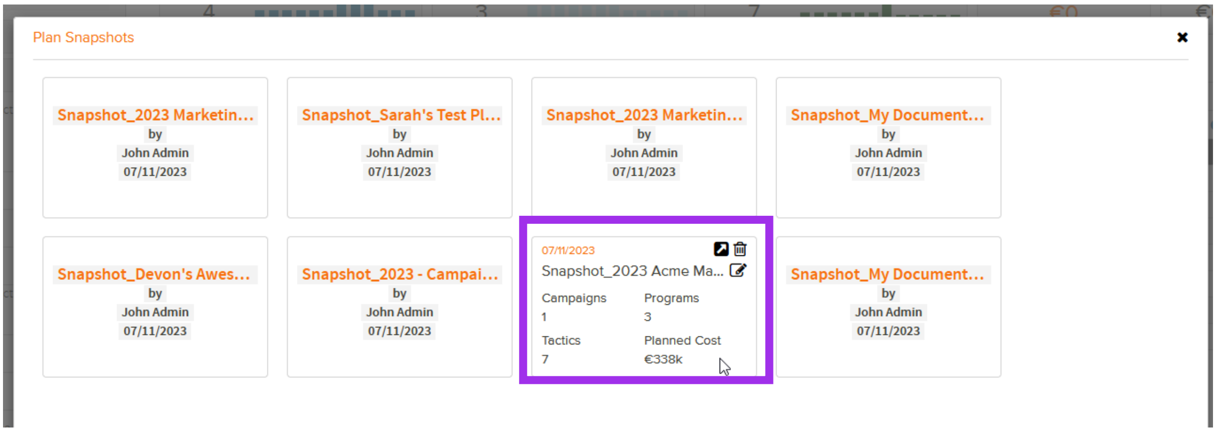
> Note
>
> A snapshot is no longer loadable if the associated model has been deleted in the meantime. In case an activity type was changed after snapshotting, the latest version of the activity type will be used when snapshot is loaded.

Snapshot Gallery

By clicking you open the snapshot gallery. The gallery displays a summary card for each snapshotted plan:



When you hover a summary card, the total numbers of campaigns, programs, and tactics as well as total planned costs are displayed. You can also access the functions for editing the snapshot name and for opening and deleting the snapshot.



3.11.1 Snapshotting Plans

- Click > *Menu* > *Plan*.
- In the filter panel on the left, select the fiscal years in which you want to snapshot plans.
- On the filter panel, select the plans you want to snapshot.
- In your workspace control panel, click .

The snapshot is created. A visual shows when the creation is complete.

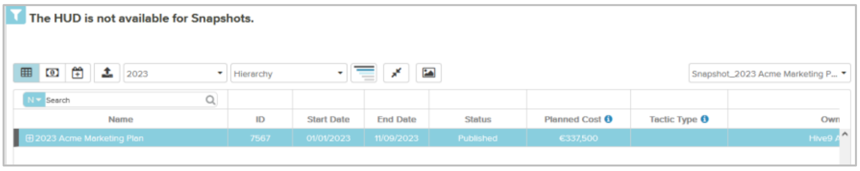
3.11.2 Opening a Plan Snapshot

- Click > *Menu* > *Plan*.
- In your workspace control panel, click .

An overview is displayed. The overview shows a summary card for each snapshotted plan.

- On the summary card of the snapshot you want to open, click .

The snapshot is opened in the plan view.



3.11.3 Editing Snapshot Name

- Click > *Menu* > *Plan*.
- In your workspace control panel, click .

An overview is displayed. The overview shows a summary card for each snapshotted plan.

- On the summary card of the snapshot whose name you want to edit, click .

The snapshot name is opened in an editable field.

- Adopt the name as wished.
- Click .

You have edited the snapshot name.

3.11.4 Deleting Snapshot

- Click > *Menu* > *Plan*.
- In your workspace control panel, click .

An overview is displayed. The overview shows a summary card for each snapshotted plan.

- On the summary card of the snapshot you want to delete, click .

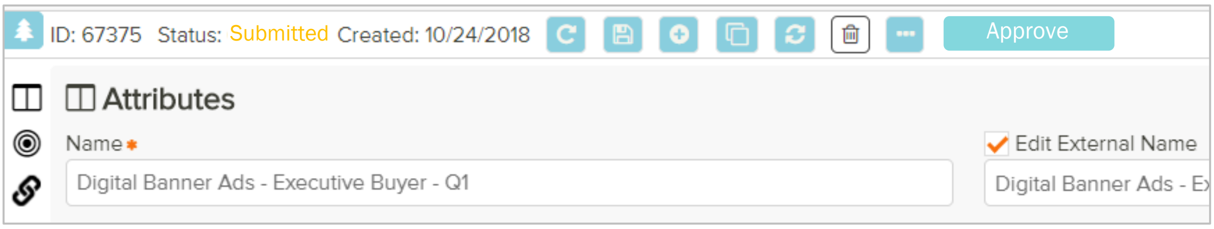
A confirmation prompt is shown.

- Click *Yes*.

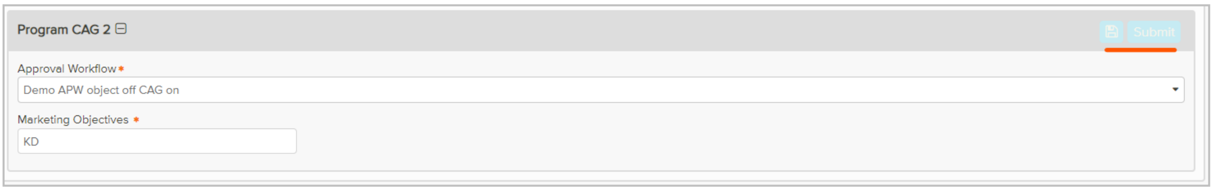
You have deleted the snapshot name.

3.12 Managing Workflow Approvals

To manage approval workflows in Hive9 you can simply enable specific users on specific teams to approve tactics on those teams. The approval is first come, first served and is accomplished by pushing a button at the top of the tactic inspection window.



In addition to object release workflows, administrators can also set up workflows for custom attribute groups, provided this feature is enabled in your instance. If appropriate workflows are set up, you will see an *Approval Workflow* dropdown and a *Submit* button in the Inspection Window in the *Custom Attributes* section. Edit the custom attribute (in the screenshot below *Marketing Objectives*) and submit it for approval.



Once submitted, you will see a list of potential approvers for each workflow step. In case you are an assigned approver, your name is marked yellow in the list.

Approvers can process the approval directly in the Inspection Window or on the *My Approval* page. Processing on the *My Approval* page allows bulk approving of several requests. When an approval request is declined, the approver must enter a comment.

Status Definitions

The statuses used in Tactic Workflow:

- *Created* – An item that has been created and has not been submitted/approved.
- *Submitted* – A Tactic that has been submitted for approval – all required fields must be filled.
- *Declined* – A Tactic that has been declined after it has been submitted for approval.
- *Approved* – A Tactic that has been approved, but the start date of the Tactic is in the future.
- *In-Progress* – A Tactic that has been approved and the start date of the Tactic has happened.
- *Complete* – A Tactic that has been approved and the end date of the Tactic has occurred.

You can create two custom statuses between the Created status and the Submit for Approval status. Please see your Customer Success Manager to employ these stages. If these custom statuses are employed, every Tactic will need to move through these statuses to get to the next.

Flow for Custom Attribute Group

In case several custom attribute groups are enabled for approval for an object, only one group is shown at a time; until and unless the approver doesn't approve the first group the next group won't be visible. Once all the custom attribute groups are approved, then the user will be able to see the *Submit* button enabled at object level (in case object is subject to approval).

If custom attribute groups need to be approved, the status of an object depends on whether the object is also subject to approval.

- Only custom attribute group approvals: Until all custom attribute group approvals are completed, object status remains *Created*. After that, the status is changed according to the hierarchy below.

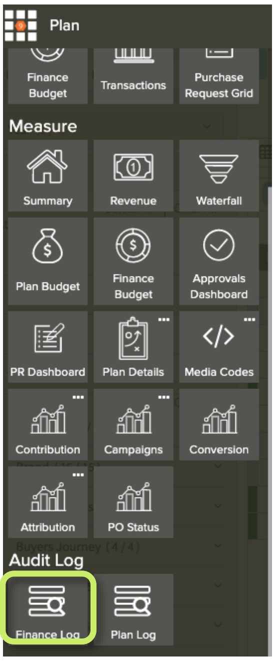
- Custom attribute group and object approval: The status is created until the object is approved.

For objects that are already approved when the feature is activated, the following applies: If custom attribute group approvals become necessary with the activation, the entire approval process must be run through again. This means that all custom attribute groups must first be approved for these objects and then the objects themselves must be approved.

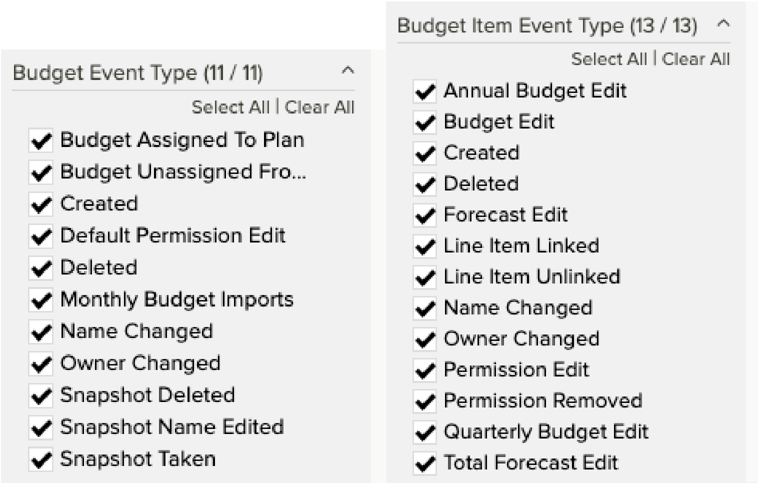
3.13 Audit Log

3.13.1Finance Log

The Finance Log allows users with permissions to view changes to any Finance Budget. To access the Finance Log, click > *Menu* > *Finance Log* in the *Audit Log* section.



Once selected, the Finance Log provides a full Filter Column of options to select the Year, Budget, User and Type of Edit to allow you to easily find the Item you are looking for. These are options available for Budget Event Type and Budget Item Event Type. As with all Filter Column choices, you can choose any or all of the possible options to filter the results displayed in the grid.



Once filter selections are made, click the 

button at the bottom of the Filter Column.

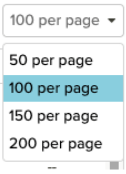
This will display the Grid containing all possible Budget edits for the selected filters. Column displayed are:

- *Date*: Date the edit was made
- *User*: The user who made the edit
- *Budget*: The name of the Budget that was edited
- *Budget Item ID*: Unique system identifier
- *Budget Item*: Name of the Row that was edited
- *Action*: The edit made to the Budget row
- *Value Prior*: The dollar value prior to the edit if the edit was an amount
- *Value After*: The dollar value after the edit if the edit was an amount
- *Difference*: The net change to the dollar amount edited if the edit was an amount

Date	User	Budget	Budget Item Id	Budget Item	Action	Value Prior	Value After	Difference
05/27/2021 07:18:42 PM	Jason Andr...	Globex 2021 NA Marketing Budget	24598	1301 Event - Booth and Signage	Jan budget allocation edited	$100,000	$215,500	+$115,500
05/27/2021 07:17:57 PM	Jason Andr...	Globex 2021 NA Marketing Budget	24598	1301 Event - Booth and Signage	Jan budget allocation edited	$215,500	$100,000	-$115,500
05/13/2021 06:49:48 AM	Nishank Modi	Globex 2021 NA Marketing Budget			fresshh, Snapshot Deleted	--	--	--
05/13/2021 06:48:56 AM	Nishank Modi	Globex 2021 NA Marketing Budget			fresshh, Snapshot Taken	--	--	--
04/26/2021 01:36:52 PM	Stephen Tur...	Globex 2021 NA Marketing Budget	24591	1002 Advertising - Search Engine M...	Dec budget allocation edited	$0	$3,500	+$3,500
04/26/2021 01:36:01 PM	Stephen Tur...	Globex 2021 NA Marketing Budget	24592	1003 Advertising – SMS	Aug budget allocation edited	$17,008	$17,010	+$2
04/02/2021 07:26:07 PM	Bruce Brien	Globex 2021 NA Marketing Budget			Budget assigned as default budget ...	--	--	--
03/01/2021 08:59:43 AM	Jason Andr...	Globex 2021 NA Marketing Budget	24600	1303 Event - Travel	Warehouse Roadshow_Line Item, Li...	--	--	--
02/26/2021 08:19:34 AM	Jason Andr...	Globex 2021 NA Marketing Budget	24590	1001 Advertising - Digital	Interstitial Social Ads_Ad Network ...	--	--	--
02/26/2021 08:19:34 AM	Jason Andr...	Globex 2021 NA Marketing Budget	24602	1401 Marketing – Agency Fees	Interstitial Social Ads_Design & Dev...	--	--	--
02/17/2021 09:27:17 AM	Bruce Brien	Globex 2021 NA Marketing Budget	24602	1401 Marketing – Agency Fees	Digital Banner Ads - Executive Buye...	--	--	--
02/17/2021 09:27:17 AM	Bruce Brien	Globex 2021 NA Marketing Budget	24607	1701 Website Development - External	Digital Banner Ads - Executive Buye...	--	--	--
02/17/2021 09:27:17 AM	Bruce Brien	Globex 2021 NA Marketing Budget	24590	1001 Advertising - Digital	Digital Banner Ads - Executive Buye...	--	--	--
02/17/2021 09:27:17 AM	Bruce Brien	Globex 2021 NA Marketing Budget	24605	1601 Video - Creation	Digital Banner Ads - Executive Buye...	--	--	--
01/21/2021 10:21:10 PM	Jason Andr...	Globex 2021 NA Marketing Budget			Snapshot 1/21/2021 4:21:08 PM, Sna...	--	--	--
01/06/2021 03:09:58 PM	Stephen Tur...	Globex 2021 NA Marketing Budget	24590	1001 Advertising - Digital	Oct budget allocation edited	$125,000	$125,500	+$500
01/06/2021 03:09:29 PM	Stephen Tur...	Globex 2021 NA Marketing Budget	24591	1002 Advertising - Search Engine M...	Dec budget allocation edited	$3,500	$0	-$3,500
01/06/2021 03:09:24 PM	Stephen Tur...	Globex 2021 NA Marketing Budget	24590	1001 Advertising - Digital	Dec budget allocation edited	$156,109	$157,110	+$1,001

There are two additional controls located directly above the Grid:

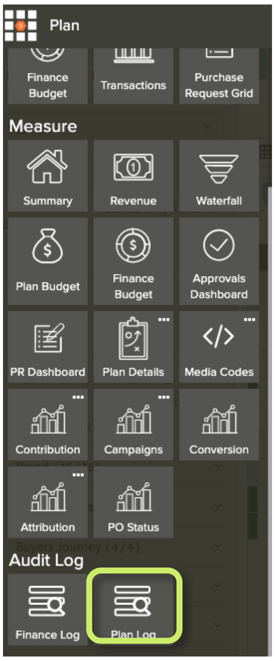
- Allows the user to determine how many grid rows to display.



- *Go To Finance Budget* – Clicking this takes the user directly to the Finance Budget section of the application.

3.13.2 Plan Log

The Plan Log allows users with permissions to view changes to any Plan. To access the Plan Log, click > *Menu* > *Plan Log* in the *Audit Log* section.

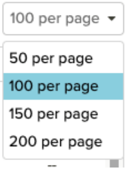


Once selected, the Plan Log provides a full Filter Column of options to select the Date Range, User (who made the edit), Owner (who owns the item that was edited) and Tactic Type to allow you to easily find the Item you are looking for. In addition, the grid allows you to filter individual columns. By simply typing in the column value you want, the grid will begin reducing the number of rows until a complete match is made. The Column values are as follows:

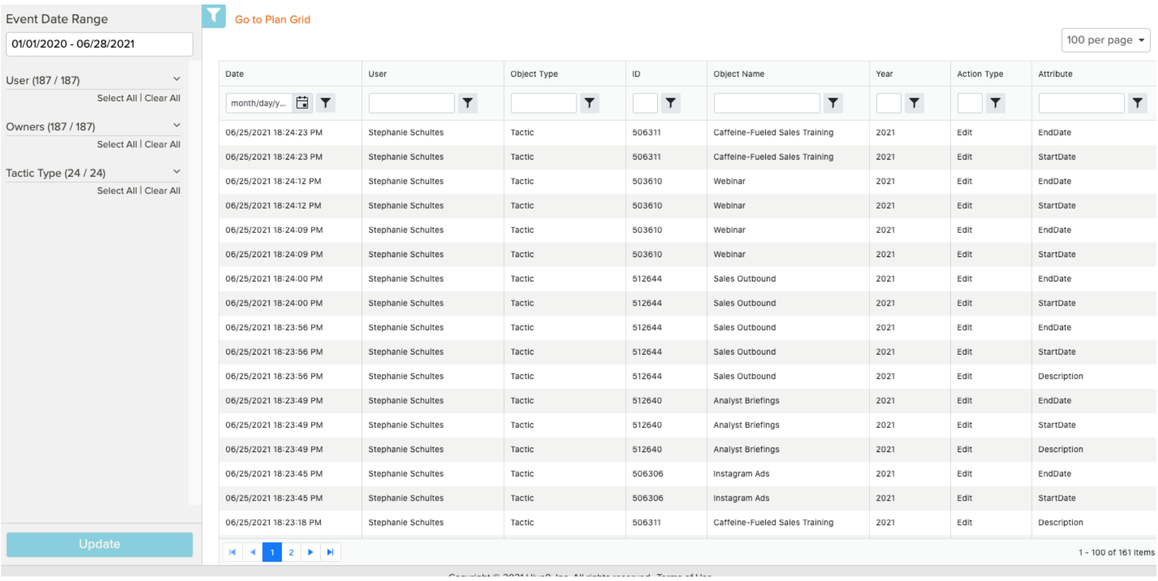
- *Date*: date of the edit
- *User*: User who made the edit
- *Object Type*: Plan objects, such as Plan, Campaign, Program, Tactic Line Item, PR and PR Line
- *ID*: Unique system ID
- *Object Name*: The name of the desired object, if known
- *Year*: Plan Year of the object
- *Action Type*: Either Create or Edit
- *Attribute*: The item attribute that was edited

There are two additional controls located directly above the Grid.

- Allows the user to determine how many Grid rows to display.



- Go To Plan Grid – Clicking this takes the user directly to the Plan Grid section of the application.

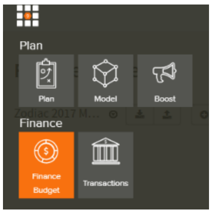


4 Budget

4.1 Finance Budget

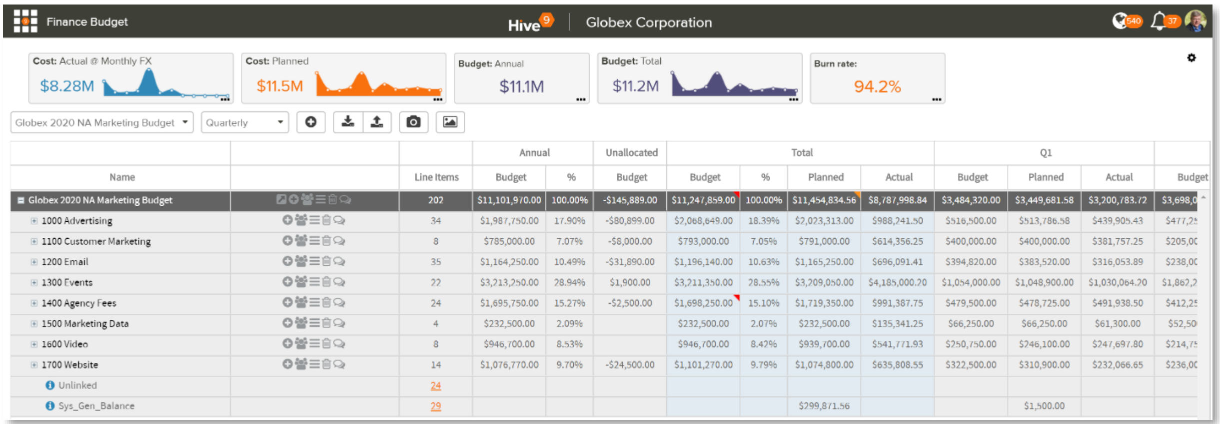
The Finance Budget provides marketers a way to manage the structure created by the Finance department.

- No limit to the levels of the hierarchy
- Ability to add custom attributes to aid in reporting
- The Finance Budget ties to Plan via the Tactic Line Item
- Ability to export and import
- Customized permissions at the budget row level
- Ability to enforce hard or soft budget limits at the budget row level
- Full audit log for all budget changes
- Budget Snapshot capability to preserve specific points



4.1.1 Columns

- *Name* – Name of the budget item
- *Budget* – The amount of budget you have for the item
- *Forecast* – A budget owner can use this column to enter what they believe they are going to spend in a time period
- *Planned* – The amount linked from a plan via a Tactic Line Item
- *Actual* – The actual amount associated with a Tactic Line Item
- *Line Items* – The total number of Tactic Line Items associated with that item
- *Owner* – The user who created the item

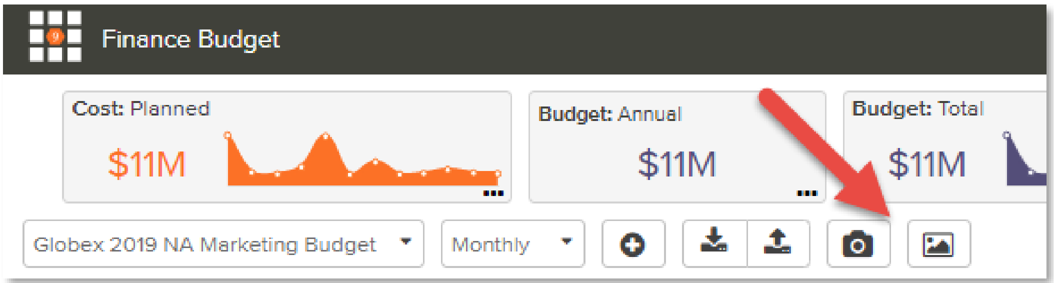


4.1.2 Snapshot and Snapshot Gallery

This function allows a user to create a snapshot of the Finance Budget at any time. Snapshots are at a user level and will include complete structure, all columns and their associated amounts/information, number of Line Items associated and Unlinked and Sys_Gen Balance rows.

All snapshots created by a user are housed in the Gallery for the users previewing. They are automatically given a name that includes a date and time stamp. The name can be edited after creation.

There is not a limit to the number of snapshots created.



4.1.3 Create Budget

- Click > *Menu > Finance Budget*.
- Click *Add New Budget button*.
- Name the budget.
- Use the Action Icon to add to budget hierarchy – New Child Item.

> Note
>
> New Item will add a hierarchy to the same level

- After a child is added, you can choose to add another child item, or you can add a new item on the same hierarchy.

> Note
>
> All branches of hierarchy must have the same number of levels.
>
> The lowest level is where the Tactic Line Item from the Plan is tied to.
>
> Typically, the lowest level is associated with General Ledger (GL Code) from the Finance department.

- After budget hierarchy is entered, you can add Budget $.
- Enter budget amounts to the correct time frame – Monthly, Quarterly or Annually.
- You can use the Filter Columns drop-down to remove/add columns to the screen
- The Unallocated column is a calculated field that compares the Annual Budget Column to Monthly allocated amounts.

4.1.4 Notes on Budget Management

You have the option to permission budgets down to the line level, ensuring that users can only see or edit the lines that are relevant to their work. Users that have "edit" permission for a budget line may also edit the permissions for that line, granting others access as needed. The "owner" of a budget line is for labeling purposes. Their actual access is "edit" access, as noted on the permissions screen.

You can further designate any budget line as a "hard limit," meaning that instead of a warning message, if the plan exceeds the budget in a specific period, the user will not be able to link the tactic line item to the budget if it is not appropriately funded. The setting for this is on the permissions screen of the budget. You may also select a timeframe for the hard limit from annual to monthly.

For hard limit lines, we keep a running total of unused budget from prior periods and store this in an "unused budget" column in the current period. We add the unused budget to the current budget for calculating the hard stop for the current period.

> **Note**
>
> The unused budget is a conservative number based on taking the cumulative YTD budget and subtracting the actual costs from closed tactics and the greater of the actual costs or the planned costs on tactics that are open or have open purchase requests (if you are using that module).

4.1.5 Link All Line Items to Finance Budgets in Multi-Year Tactics

Each line item in your multi-year strategy must now be directly linked to a financial budget. When you are either creating or modifying line items in any year of a tactic that extends over multiple years, it is important to ensure that each line item includes a budget link. This will provide complete financial accountability throughout your tactical planning processes.

Validation Rule Details

This validation is applicable only if the "Finance Budget Link Required on Line Item creation" setting is turned ON at the Organizational Setup screen (Section 10.8.5).

How It Works

When you create or edit line items in a multi-year tactic:

- The system verifies that every line item has a finance budget link for each fiscal year
- If any line item is missing a budget link for any year, you'll see a validation error:

```
Error! Finance Budget link cannot be empty for the year(s):
[YEAR].
```

You must add all missing finance budget links before you can save your changes

Where This Validation Applies

This validation is enforced in all Hive9 dialogs and windows where you can manage line items, including:

- Tactic Inspection Window
- Plan Grid and Calendar Grid
- Bulk Edit functionality
- Import Tactic functionality

Resolving the Validation Error

If you encounter the above error:

1. Navigate to the "Link To Finance Budget" section in the line item view.
2. Select the fiscal year that's missing a budget link in the "Budget Year" dropdown.

3. Choose the appropriate budget item using the picker interface.
4. Repeat for any other years that are missing budget links.
5. Save your changes.

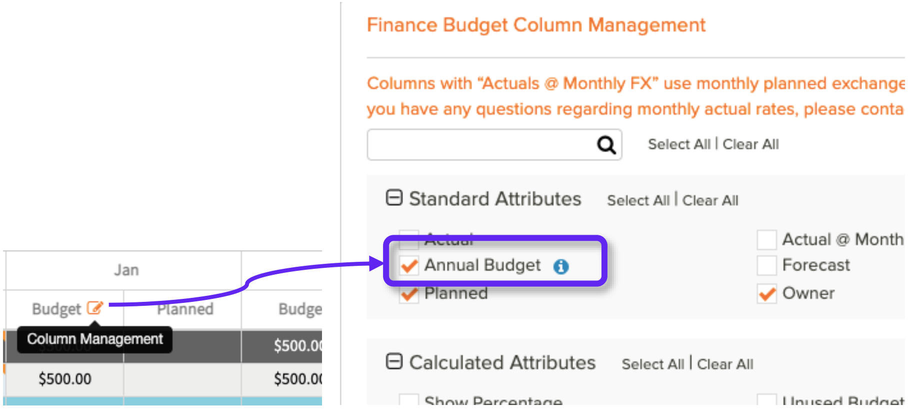
This validation ensures:

- Complete financial tracking for all line items across multi-year tactics
- Proper allocation of expenses across fiscal years
- Accurate financial reporting and forecasting
- Alignment between your tactical planning and financial budgeting

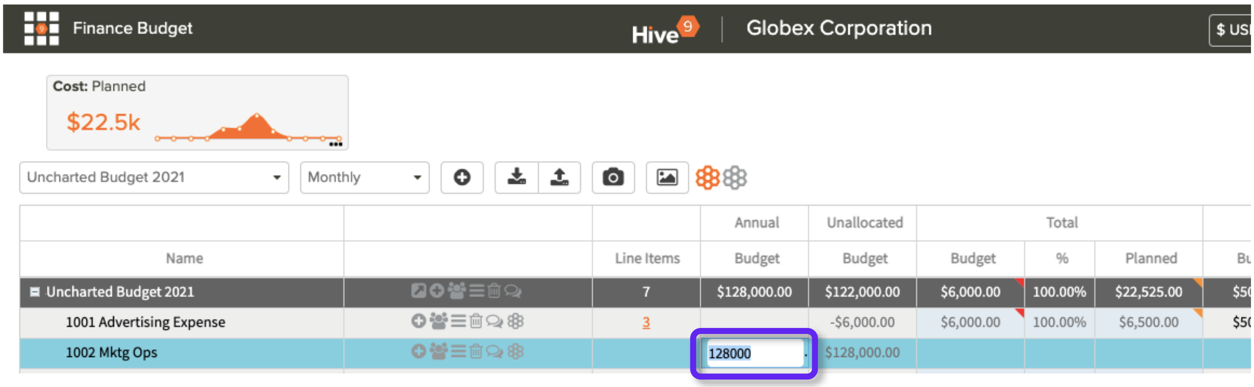
For more information on linking line items to finance budgets, see section 3.4.5 of this guide.

4.1.6 Automatic Budget Distribution

Hive9 provides a fast way to evenly distribute an Annual Budget over the Monthly or Quarterly periods, alleviating the need to manually fill in each period's allocation. To automatically distribute you Annual Budget, first make sure you have the Annual Budget column displayed in column Management. To turn on Annual Budget, click the pencil icon in any column header to open the Column Management window.



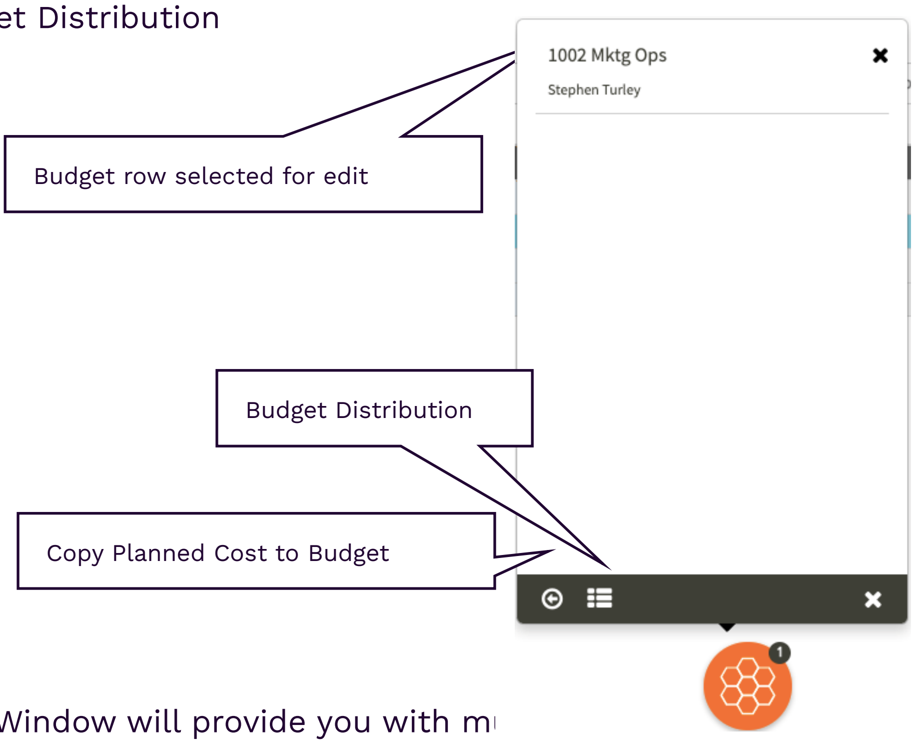
In the Budget Grid, enter an amount in the Annual Budget column for the Budget Row you want to distribute.



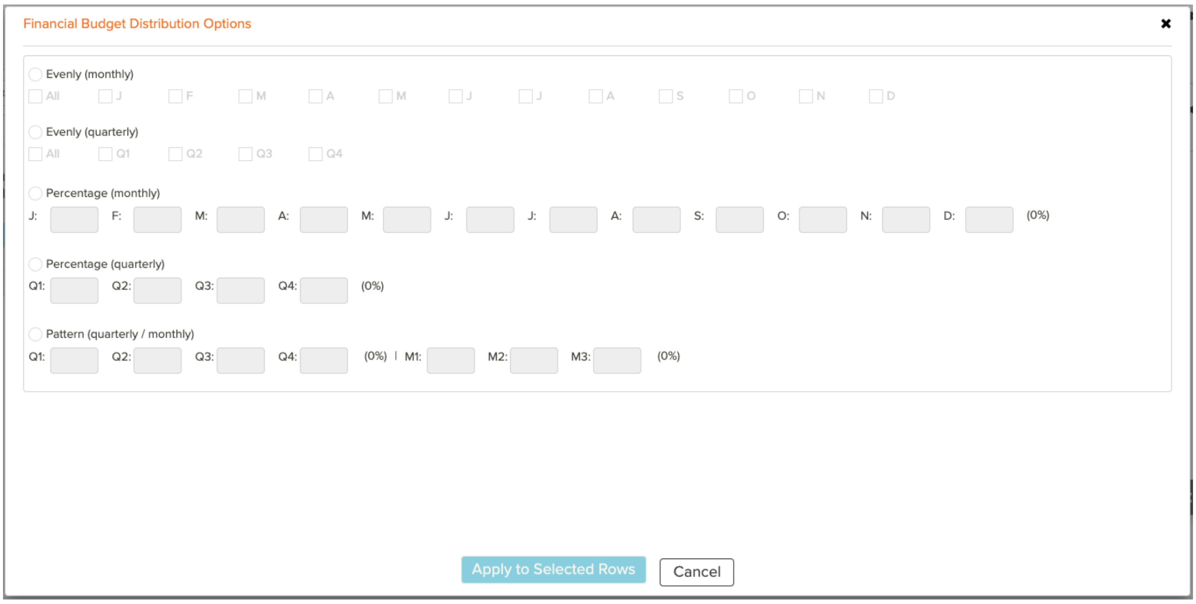
Next, click the  Icon on that row to open the bulk editor. This will display a larger Honeycomb in the lower, right-have corner of the browser. Click on that Icon to open the editor.

The editor will display the Row you have selected and provide two options at the bottom of the Editor popup:

Select Budget Distribution



The Editing Window will provide you with m
your Annual Budget. Select the distribution you wish to use. When complete, click *Apply to Selected Rows*.



To distribute evenly across all 12 Months:

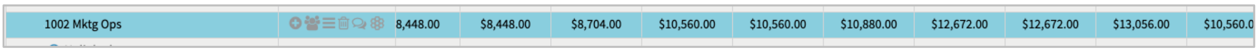
To distribute evenly across all four quarters:

To distribute monthly as a percentage by month (note the total must = 100%):

To distribute quarterly as a percentage by quarter (note the total must = 100%):

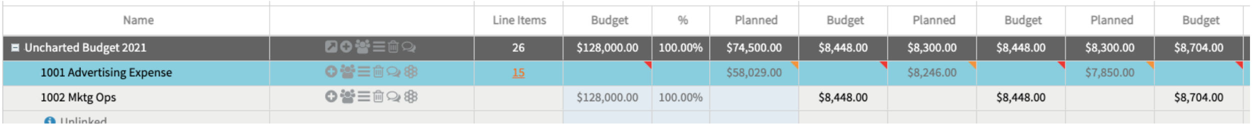
To establish a monthly or quarterly pattern, first select the distribution % by quarter, then the distribution % within each quarter. The actual dollars will be distributed within that pattern.

Once the selection has been made and applied, the total Annual Budget will be distributed accordingly:



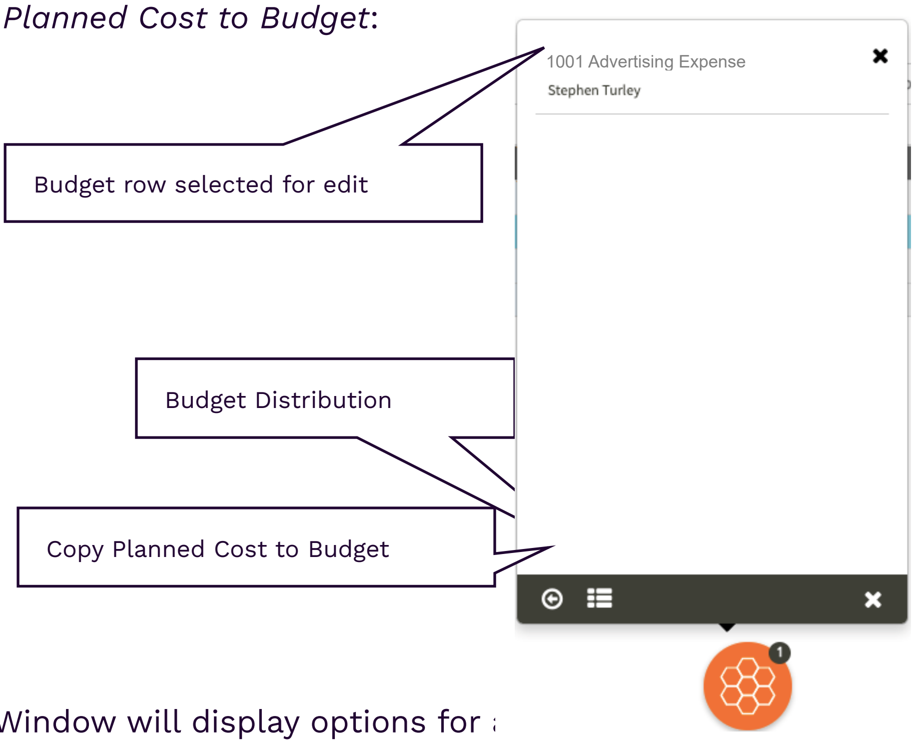
4.1.7 Make Budget Match Planned Cost

Some organizations create their budget to match the bottoms-up costs associated with all tactics planned throughout the Plan Year. In this case, Hive9 offers a quick way to transpose those summed Planned Costs directly to your budget. In this example, we have $58,029.00 Planned cost allocated to the 1001 Advertising Expense row of our Budget. To convert those Planned Costs to Budget Amount by month, click the icon on the 1001 Advertising Expense row to open the Honeycomb Bulk Editor.

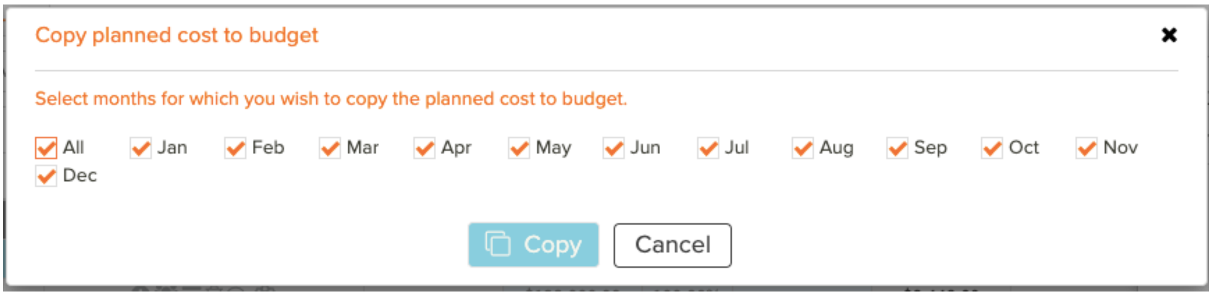


Name		Line Items	Budget	%	Planned	Budget	Planned	Budget	Planned	Budget
Uncharted Budget 2021		26	$128,000.00	100.00%	$74,500.00	$8,448.00	$8,300.00	$8,448.00	$8,300.00	$8,704.00
1001 Advertising Expense		15			$58,029.00		$8,246.00		$7,850.00	
1002 Mktg Ops			$128,000.00	100.00%		$8,448.00		$8,448.00		$8,704.00

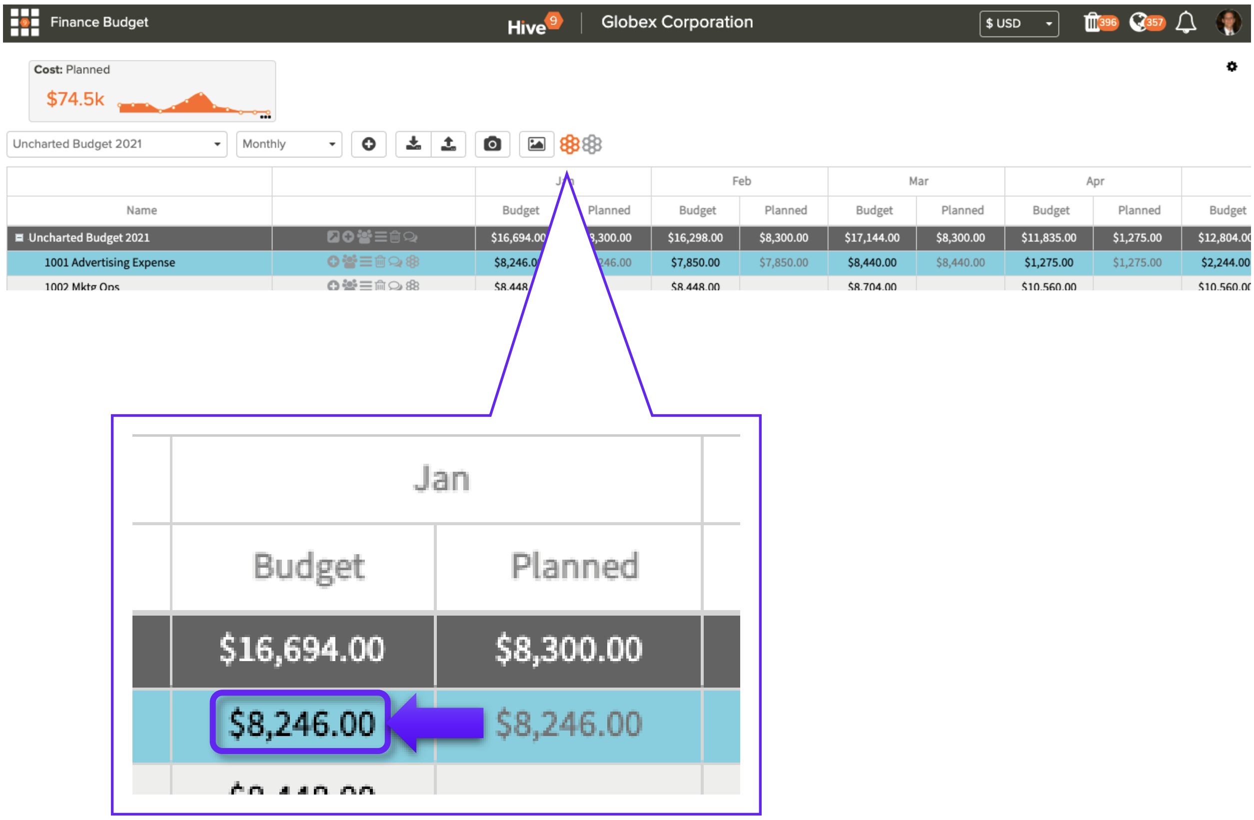
Select *Copy Planned Cost to Budget*:



The Editing Window will display options for copy Planned Cost to Budget. Select the months you wish to use or select All for all 12 months. When complete, click *Copy*.



Your Planned Costs are now copied into the Budget columns for all selected months for the selected row(s).

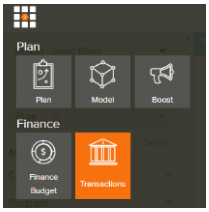


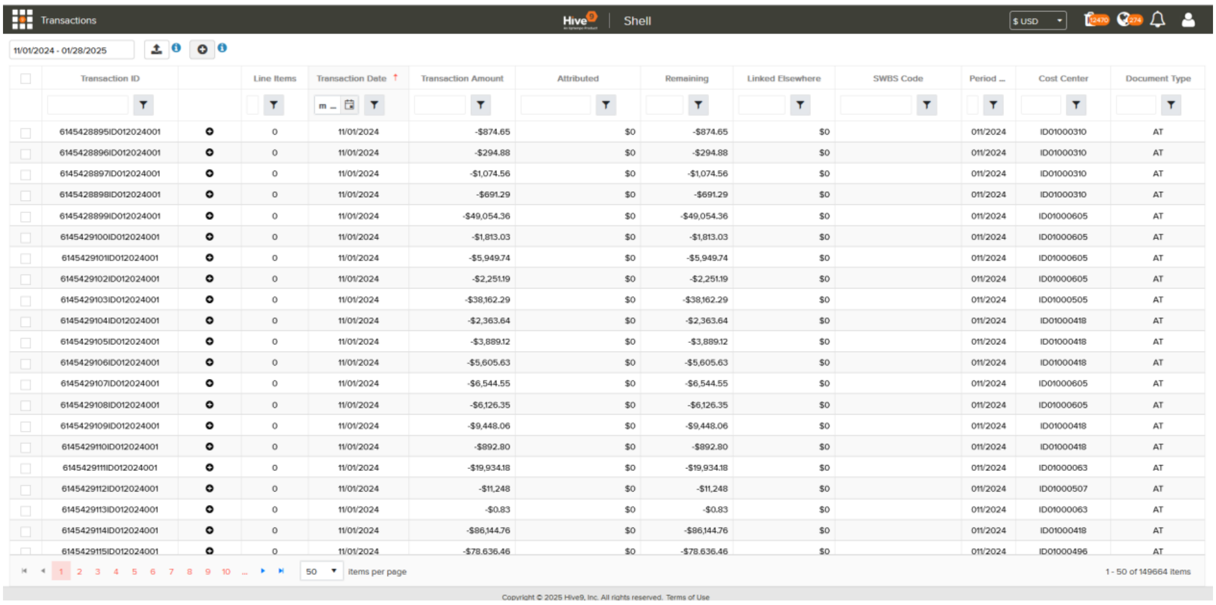
4.1.8 Transactions

Transactions is where actuals for financial integration are stored.

Grid Features:

- Sort any column by clicking the column header
- Filter data using the filter options in each column
- Select multiple transactions using checkboxes for bulk operations
- Navigate through pages of transactions using pagination controls





The Transactions grid displays:

- Transaction ID – The client's unique transaction ID from the financial system
- Date Range – Date of the transaction (typically, the date the transaction was paid)

- Action Icon – Use this to Link a transaction to one or more Line Items, Edit the amount and/or the Line Item the transaction is linked to, and/or Delete the link to a transaction.

> Note
>
> If you delete or edit an amount linked, it will not update the financial system.

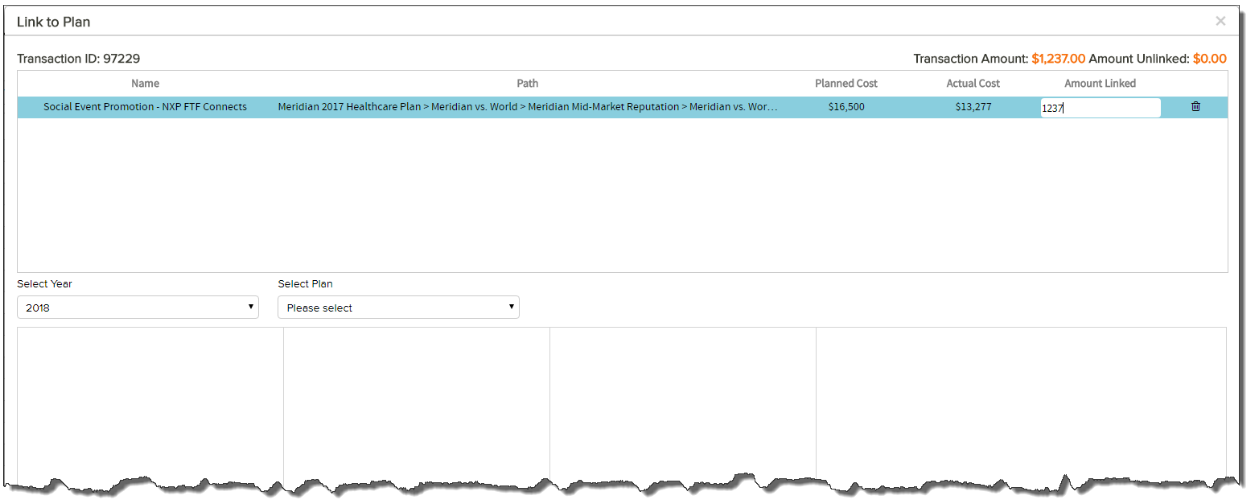
- Line Items – The number of Line Items linked to that transaction. The number can be clicked for a sub-grid of all linked Line Items.
- Transaction Amount – The amount of the transaction
- Amount Linked – The amount of the transaction linked in that transaction
- Amount Unlinked – Any amount that was not linked (balance) on that specific transaction

4.1.9 Custom Fields

There are 13 fields that can be used as attributes to a transaction to provide more information about that transaction to users of Hive9. Below are some sample field names:

- Transaction Description
- Account
- Account Description
- Sub Account
- Department
- Vendor
- Purchase Order
- Invoice Number

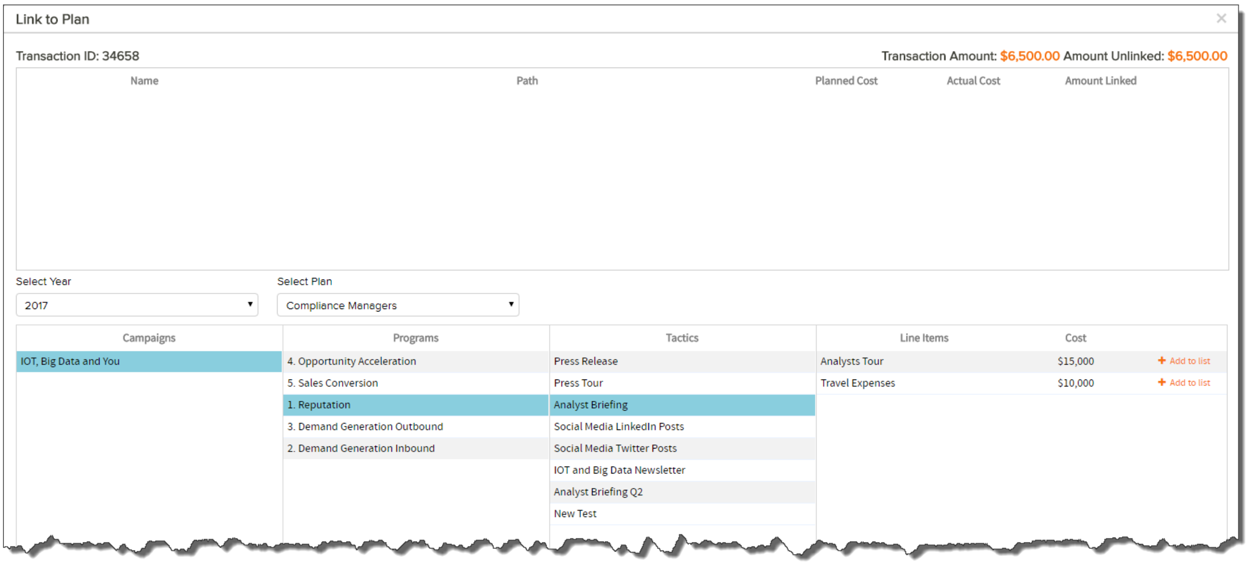
4.1.10 Edit and Delete Transaction Link



- Click the Action Icon on the Transaction list
- Choose:

* Edit *Amount Linked*. The amount linked can be edited by double-clicking that field
* Delete – Use the Delete Icon to remove the link between Transaction and Line Item.

4.1.11 Add a Transaction Link



- Click the Action Icon on the Transaction list.
- Dropdowns - Select Year and associated Plan in Select Plan.

- Choose Campaign, Program, Tactic and Line Item to Link the transaction. Child hierarchy list will be populated when parent is chosen
- Click *Add to List* Icon. When it is the Line Item, information will be added in highlight in the above section.
- Click *Save*.

4.1.12 Assigning Teams to Plans and Budgets

In order for users to gain access to Budget content, users must belong to a team that is assigned to a Budget. Once a team is assigned to a Budget, a user's role will further determine the actions that the user can complete inside the Budget.

Assign a team to a Budget

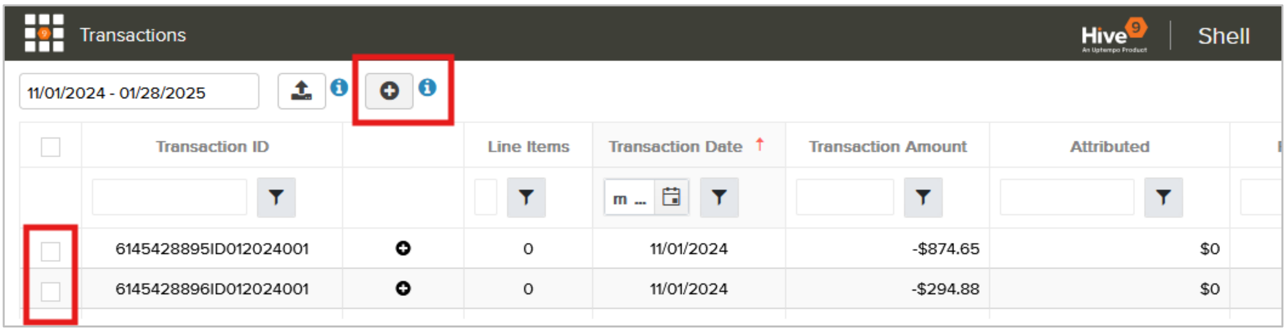
- Open the *Inspection Window* for the budget that you want to assign a Team to.
- Under the *Setup* section, use the dropdown to select the Team that you want to have access to the budget.
- Select the default level of permission you would like to grant row-level access for the members of the team.
- Click *Save*.
- Only one team can be assigned to a budget at a time; however, the same team may be assigned to multiple budgets. When assigning a team to a budget, select the default permissions that you want to grant the members of the team. Once you have saved the changes on the Budget Inspection Window, you may change the permissions at the row level to allow specific members to have editing permission per row.

4.1.13 Bulk Linking Transactions

You can link multiple transactions to a single line item simultaneously using the bulk linking feature.

Starting Bulk Linking

- In the transaction grid, select two or more transactions using the checkboxes.



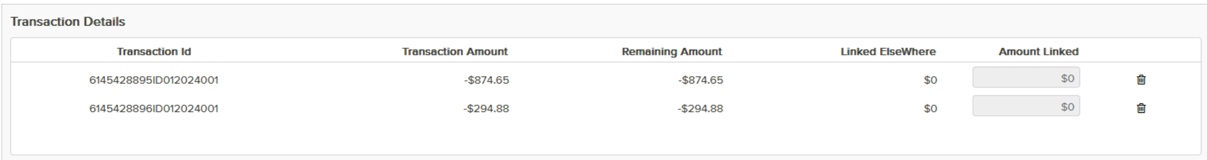
- Click the "Map Bulk Transactions" button (appears next to the Export icon)
- The button is only active when multiple transactions are selected
- The button remains disabled if one or no transactions are selected

Using the Bulk Transaction Mapping Window

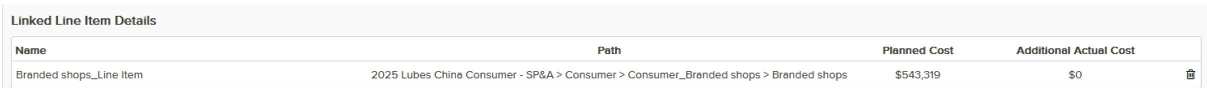
The mapping window consists of two sections:

a) Upper Section

- Selected Transactions Grid: Shows all transactions you've selected



- Selected Line Item Grid: Displays the line item you choose for linking



b) Lower Section

- Plan Picker: Use this to select the target line item

Mapping Process

Select your desired line item using the Plan Picker. The line item amount or the Transaction Remaining Amount, whichever is lower, is automatically populated in the Amount Linked text boxes against each selected transaction.

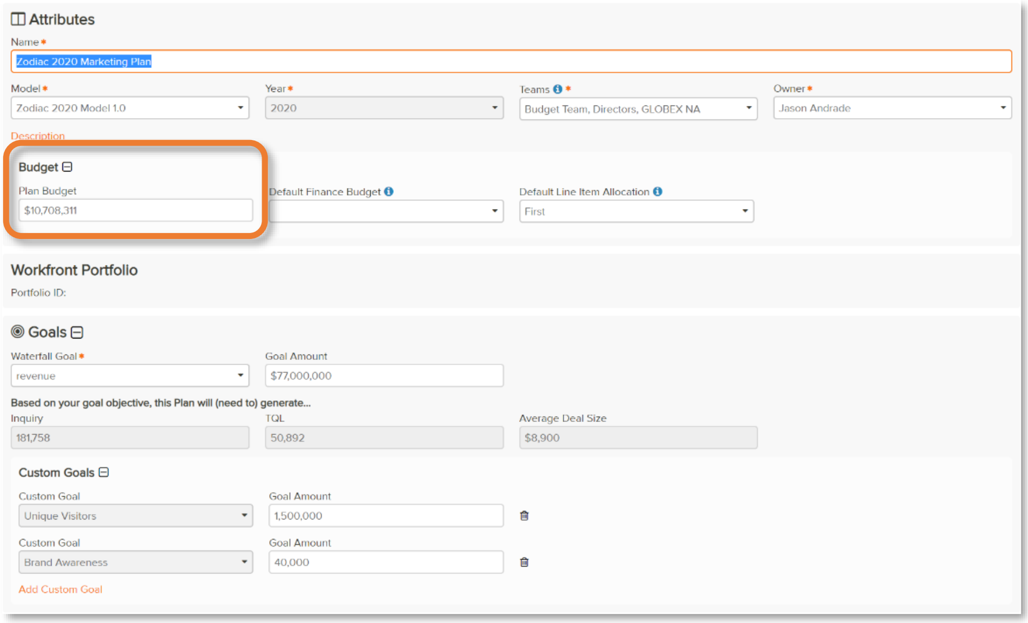
> Example
>
> For a $1,000 line item and 2 selected transactions, T1 has a remaining balance of $500 and T2 has a remaining balance of $5000, so for T1 the Amount linked will be $500 by default and for T2, the Amount linked will be $1000 by default, which can then be changed by the user.

> Note
>
> If any selected transaction is already linked to your chosen line item, you'll receive a notification to remove that transaction from your selection. The amount allocated to each transaction cannot exceed the maximum transaction amount in your selection.

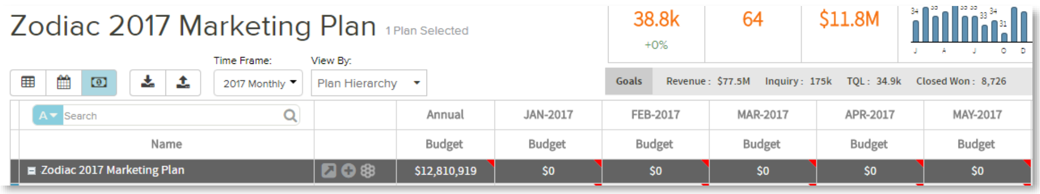
4.2 Plan Budget

The Plan Budget feature is for customers who need to manage budgets without the constraints of the Finance department.

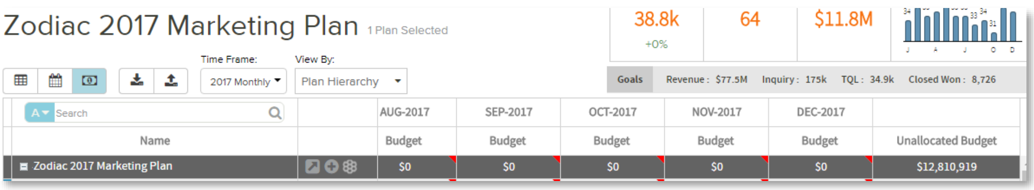
4.2.1 Allocation at Plan Level



Open the Plan Inspection Window and fill in the Plan Budget field. Campaign and Program inspection windows also have Plan Budget fields. The amount entered will display in the Annual column in the Plan Cost View. You can allocate the Annual amount to specific quarters or months

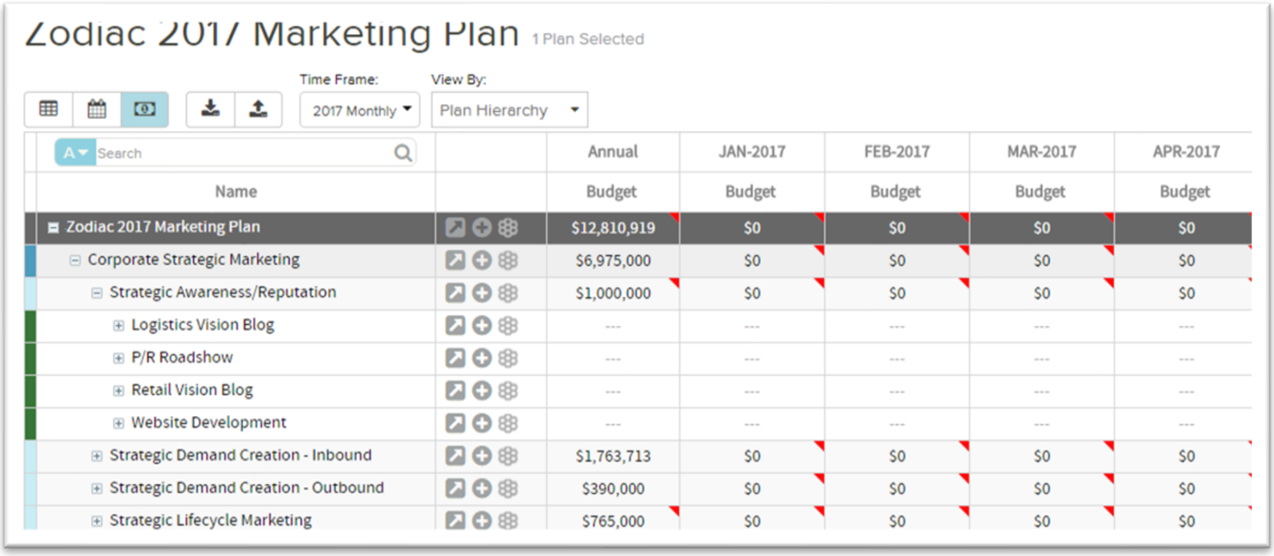


The Unallocated Budget column (below) will show the balance between the Annual column and the allocated months



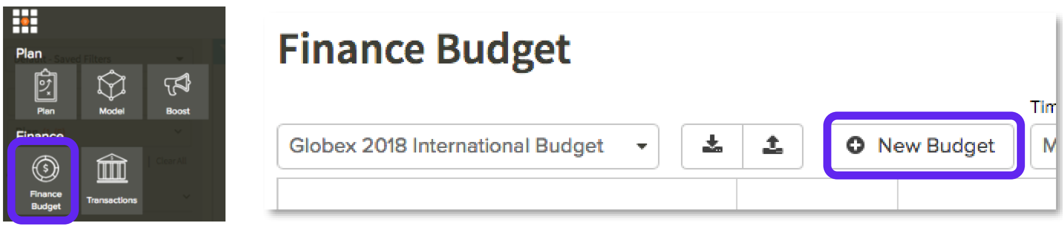
Allocation down to Campaign and Programs

- The amounts entered for Campaign and Programs budget are deducted from their Parent
- A child budget can be more than the parent budget amount
- A Tactic does not have a budget; it has Planned Costs.



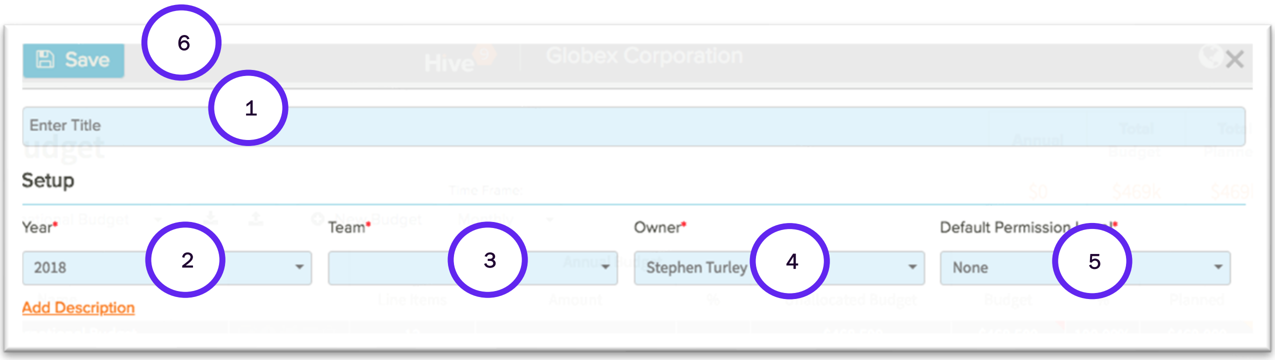
4.3 Creating a New Finance Budget

- To create a new Budget, select Finance Budget from the Navigation Menu.

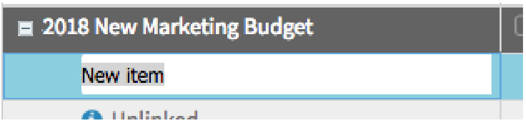


- Click *New Budget*.
- Type in a Budget Name.
- Select the Budget Year. You can select the current year or 10 years into the future, as well as into the past.
- Select the Team(s) that will be able to work on the Budget.
- Select the Budget Owner (the system defaults to the person creating the Budget).
- Select a Default Permission Level:

- None: Only the Owner can view or edit
- View: Everyone can View, but only the Owner can Edit
- View/Edit: Anyone can View and Edit
  - Click *Save*.



  - Begin adding rows to your budget by clicking the icon and Select *New Child Item*.
  - Type a name for the new row:



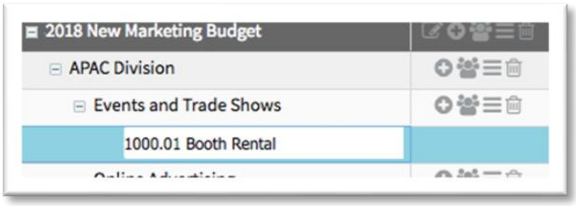
In this example, we will build out the categories for the APAC division first. The next set of rows will be child items under the APAC division.

  - On the APAC Division row, click the Icon and select *New Child Item* and type a name for the new row.
  - Repeat this process to add additional rows representing additional categories, as needed.

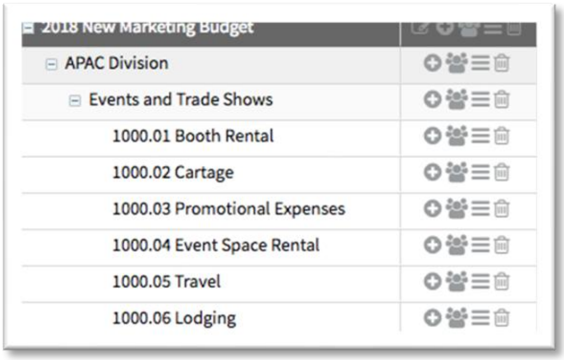
Now we will create additional Child Items, representing the GL code level of the Budget. Note that Hive9 allows any number of levels for your Budget. However, it is recommended that all sections of your

Budget maintain the same number of levels to create reporting that rolls up evenly across all budgets.

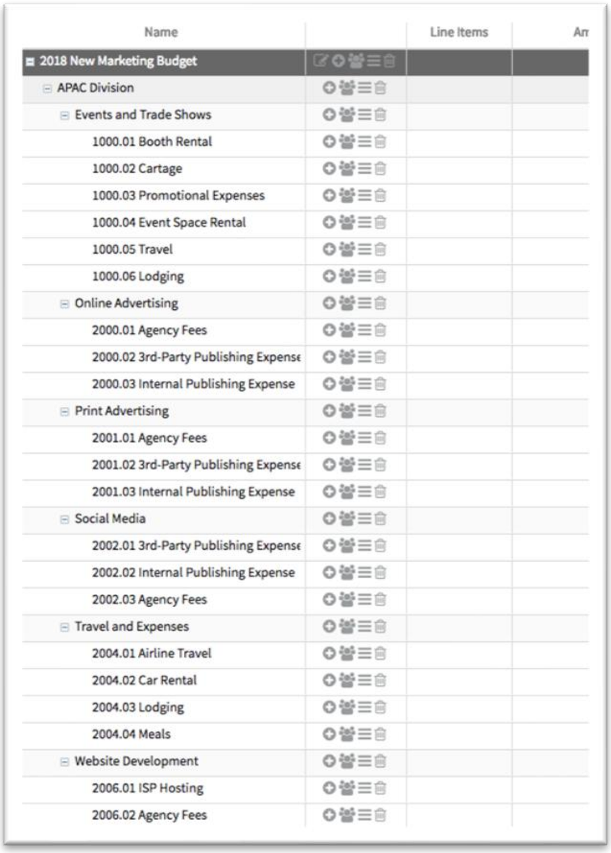
- On the Events and Trade Shows Row, click the Icon and select *New Child Item*.
- Type a Name for the new Row



- Repeat this process to add additional Rows representing additional GL-level categories, as needed.

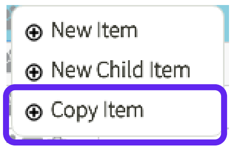


- Complete the GL-level categories for the remaining Sections in your APAC Division.

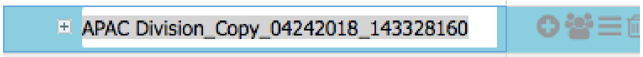


In this example, our EMEA Division uses an exact duplicate of the APAC structure for its budget. We can leverage the work already done in creating the APAC Budget by using the Copy function to duplicate the entire Budget Structure.

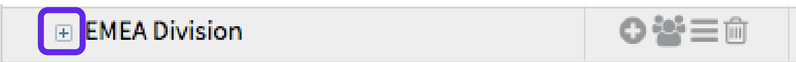
- On the APAC Division row, click the Icon and select Copy Item



- Rename the newly created copy.

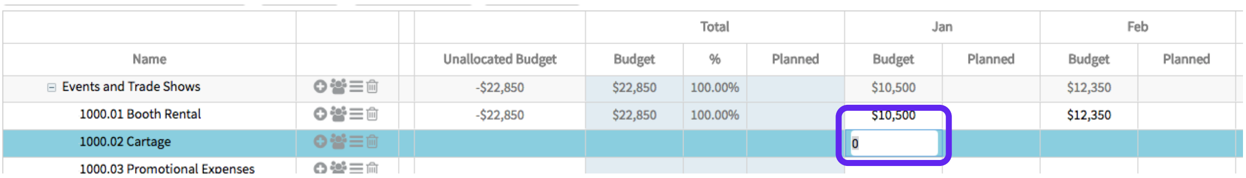


- Click the Icon next to your newly renamed Row to reveal the entire Budget Structure that has now been copied.



4.3.1 Entering Your Budget Amounts

To enter an amount in any Budget cell, simple click into the cell. Entry works much the same way as a standard spreadsheet.



Important notes to remember about Budget entry:

You may only enter amounts into the Budget and Forecast columns. Other columns are calculated by the system and cannot be entered in the Budget.

You may only enter Budget amounts on the GL-level Rows. All sections above the GL-level rows are rolled up and summed automatically.

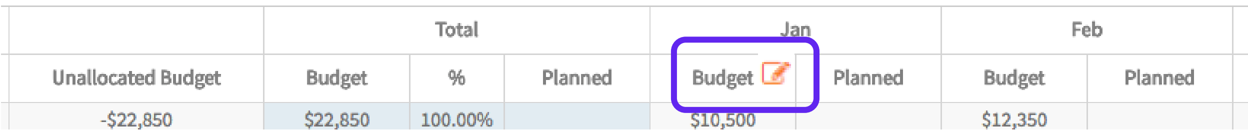
From the earlier Section (3.4.5.1, Add Line Item), the Planned column is populated with those tactic Line Items assigned to this Budget GL Code. This column may not be edited in the Budget.

The Tab key will operate to move your cursor to the next column to the right. You may find that you can tab to a non-editable column (such as 'Planned'), but that you may not be able to edit it. Press Tab to jump to the next editable column.

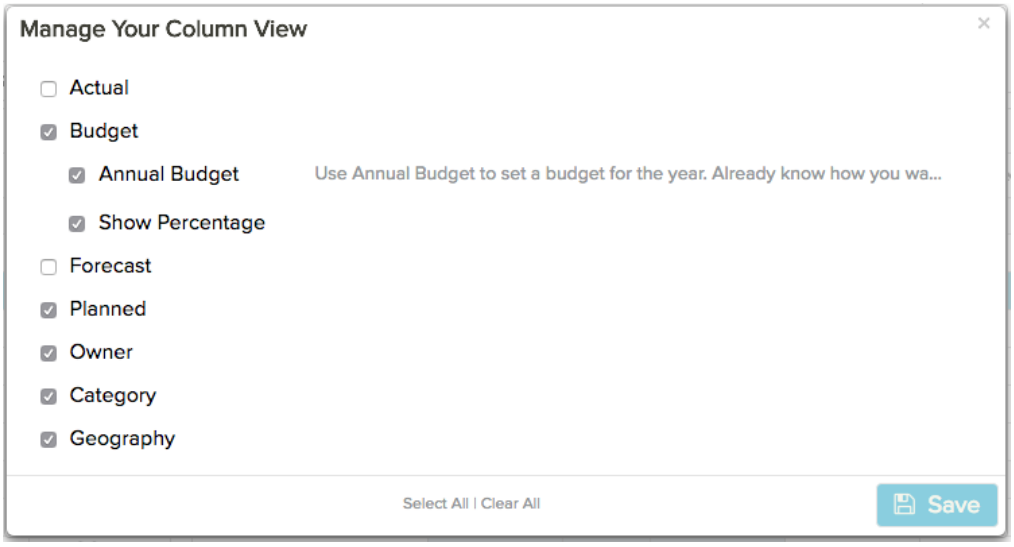
4.3.2 Budget Column Management

You may select the Columns you wish to display in your Budget. This helps when editing values because you can turn off columns that are not editable during the entry process. Your Column Views are saved until you change them.

To display Column Management, roll over any Column Header to reveal the orange pencil editing icon .



Click on the editing icon to open the Column Management Editor.

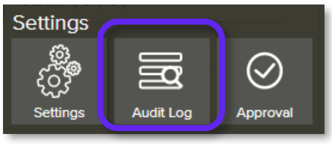


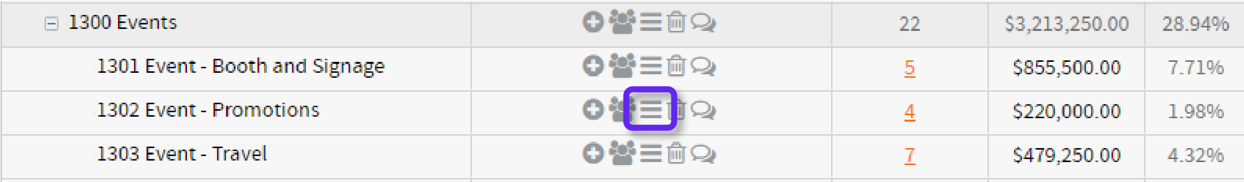
Select any or all of the available checkboxes to choose the columns you want to display.

Click Save. The Columns will update and remain until you change the settings in Column Management.

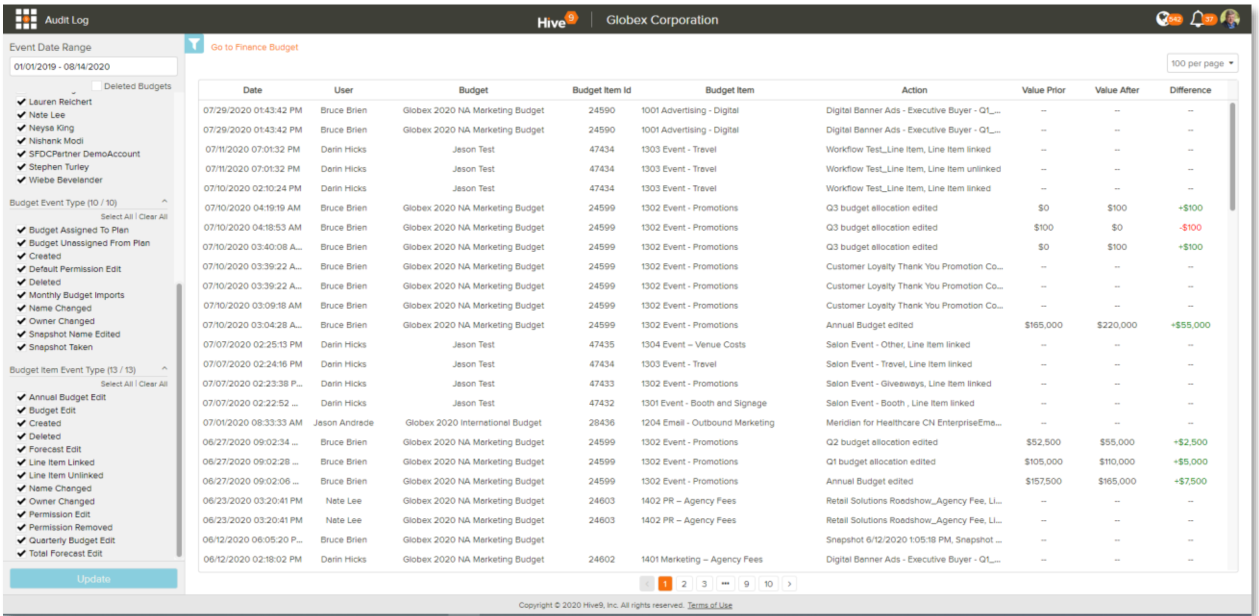
4.4 Budget Audit Log

The budget audit log contains every change that was made to your budgets, when the change was made, the name of the user who made the change, which budget was changed, which budget item and ID were changed, what action was taken, and what the value was before the change, after the change, and the difference. Users can filter by date, budget name, user, and action taken, even looking at deleted budgets if needed.





The audit log for a single budget line can also be accessed by clicking the audit log icon on the budget line in question. This will filter the audit log to that budget and only show changes to that line. See the full budget audit log below:



5 Accruals for Budget or Plan Budget Line Items

Accruals are used in accounting to charge for work that has been done but not yet invoiced, for which provision is made at the end of a financial period. This feature answers the Finance department's question whether a planned expense is real, and the money must be spent later, or whether the money is given back to be spent elsewhere.

The function automatically proposes accruals for plan or budget line items where the planned and actual costs differ by a configurable amount. This amount is calculated from planned costs minus actual costs. However, users can also request an accrual for smaller variances.

> Note
>
> The *Accrual* feature is an optional function that is not automatically enabled in every system. Contact your representative for more information.

5.1 Process

The accruals requests are managed in the Accrual Request Grid. The user can edit and request the accruals. Depending on the setup in your system, this can be done with or without an approval workflow:

- *With an approval workflow*: Once an accrual request is submitted for approval, its status is set to *Submitted*. The accrual request is processed in the workflow and is either rejected or approved on the *My Approvals* page. Once an accrual request is approved, the status will be changed to *Approved & Sent*. The accrual request is sent to the financial recipient for further processing.
- *Without an approval workflow*: If no approval workflow is applied, then in the Accrual Request Grid, user sees a *Send* button. By clicking this button, the accrual request is directly sent to the financial recipient and its status is set to *Sent*.

The financial recipient is configured by the system administrator and performs the required transactions. Afterwards, these transactions are imported to Hive9 through the standard financial import.

> Note
>
> To be able to import accrual request data, the import must be updated. Please inform your Customer Success partner which import field contains the *Accrual Request Line ID*.

After the import, the system checks whether it is a budget or plan accrual and assigns the transaction amount to the appropriate plan item line ID or budget item line ID. Subsequently, the accrual request status is changed to *Processed*.

The user sees the transaction in the relevant places in the system, for example, in the Finance Budget Grid in the *Actuals* column in the row of the budget line item linked to the accrual request.

5.2 Administrator Tasks

5.2.1 Set Up

You set up the function in the settings of the financial budget. You can find the following fields.

Field	Description
Accrual Duration	Defines whether the line items or budget items are to be considered for the previous month, previous quarter, or YTD.
Offset Date	Defines the date of the month until when accruals for the previous month will be allowed. Example: If you select 25, then any accrual entered before the 25th of a month will be considered for the previous month, while any accrual entered on or after the 25th will be considered for the current month. If no value is selected, the last date of the month is selected as offset date.
Accrual Threshold (USD)	Defines the minimum accrual amount needed for loading the default line items or budget items in the plan picker or budget picker, respectively. Any line item or budget item having accrual amount (Planned Cost – Actual Cost) less than the threshold value will not be loaded automatically in the plan picker or budget picker. However, users can still manually select such line item or budget items. If no threshold amount is specified, it will be considered as 0.

5.2.2 Grant access

Only the users belonging to a group/role that has access to the accrual request functionality can view and create/edit accrual requests. To be able to use the function, a user must always see the Accrual Request Grid. To grant access to the Accrual Request Grid, go to > *Settings* > *Roles* and activate the according view permission for the roles in need:

Finance Budget Snapshot	View	
Create/Edit/Delete Snapshots		Yes
Finance Budget Audit Log	View	
Plan Audit Log - Note: Audit Log can contain sensitive information	View	
Purchase Request Grid	View	
Accrual Request Grid	View	
Recycle Bin	View	
Custom Object Workflow	View	
Transactions	View	

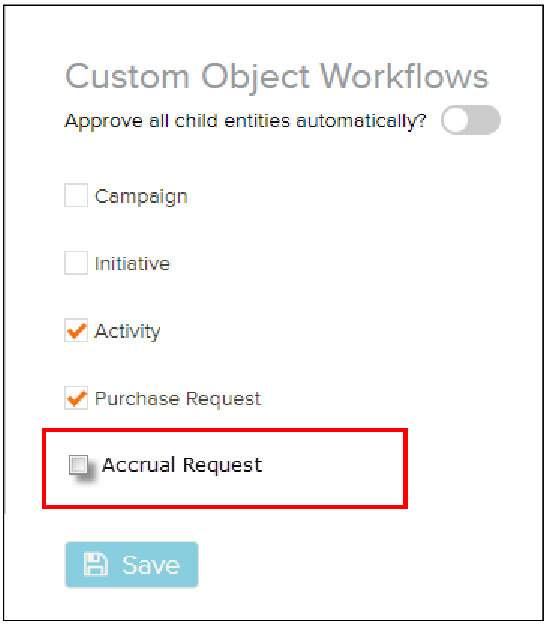
The above-mentioned permission does not guarantee users all rights to create, edit and/or delete accrual requests. These permissions are granted in *Plan* section of a role's permission list:

Plan		View	
	Create	Edit	Delete
Plans	Yes	Yes	Yes
Campaigns	Yes	Yes	Yes
Programs	Yes	Yes	Yes
Tactics	Yes	Yes	Yes
Line Items	Yes	Yes	Yes
Purchase Request	Yes	Yes	Yes
Accrual Request	Yes	Yes	Yes
Actuals		Yes	

5.2.3 Enable/Disable Accrual Request in the Advanced Approval Workflow

Administrators can select/deselect the *Accrual Request* feature at the *Advanced Approval Workflow* level. If accrual feature is selected at the *Advanced Approval Workflow* level, then accruals are submitted for approval and one or more designated users must approve/decline the accruals.

Go to > *Settings* > *Custom Object Workflows* and activate/deactivate the Accrual Request checkbox:



5.2.4 Creating Custom AR Report/Grid for PO and Invoice Details

The *AR Invoice Details* grid provides a complete view of Accrual Requests (AR), including associated Purchase Order (PO) and Invoice information.

> Note
>
> This feature is not enabled by default. Please contact Hive9 support for more information.

Accessing the Grid

1. Look for the *AR Invoice Details* icon in the left-side menu.
2. Click the icon to open the new nested grid.

Grid Structure

- Top level: Accrual Requests and AR Lines (similar to current AR Grid)
- Second level: Nested PO Numbers under each AR Line
- Third level: Nested Invoice details under each PO Number

Using Filters

Access filters on the left side of the grid. Available filters include:

- All existing AR Grid filters
- Plan Name
- Budget Name
- Finance Budget (child level)
- AR Owner

Note: Filtering by *Budget Name* or *Finance Budget* will only display AR's and AR Lines with Line Items connected to budget items.

Viewing Line Item Cost Allocation

1. Locate the "Line Item Cost Allocation" icon at the AR Line level.
2. Click the icon to open a popup showing allocated planned costs.
3. Review the read-only information, displayed as in the Activity/Tactic information window.
4. Close the popup using the provided button.

Column Management for AR Invoice Details Grid

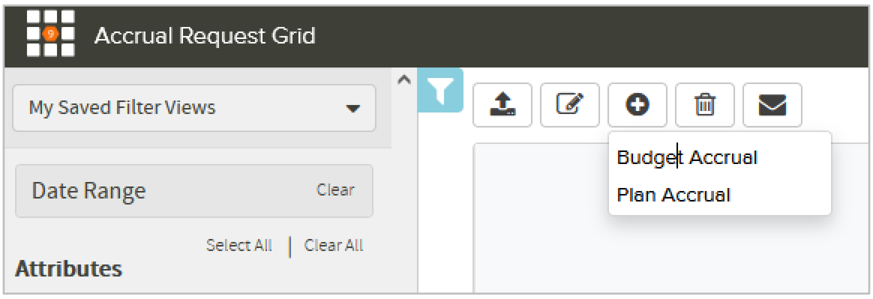
Section	Attributes
Standard Attributes	Accrual Month, Accrual Type, Actual Amount (in period), Approval Workflow, AR Date, AR line Amount, Budget ID, ID, Level, Line Item ID, Name, Owner, Planned - Actual Amount (in period), Planned Amount (in period), PO Count
PO Attributes	Invoice Count, PO Amount, PO Number
Invoice Attributes	Accruals, GR Date, Invoice Amount, Invoice Date, Invoice Number, Recommended Accrual, SE Date
Accrual Request Custom Attributes	All Custom attributes from AR level
Accrual Request Line Item Custom Attributes	All Custom attributes from AR Line level

5.3 User Tasks

To manage accrual requests, go to > *Menu* > *Accrual Request Grid*.

5.3.1 Create an Accrual Request

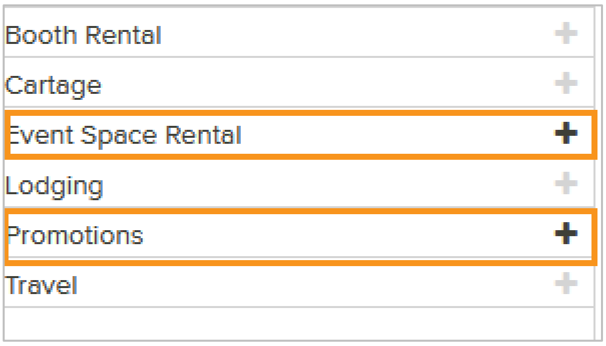
- In the Accrual Request Grid, click the *Plus* sign.
- In the menu, select whether you want to create a budget or a plan accrual:



The dialog *Link to Budget* or *Accrual Line Item* is displayed.
The upper part shows a list of eligible budget or line item(s) that you might want to select for the accrual. You'll only see items you own. In the lower section, you can quickly navigate to and select budgets or line items.

Plans and budgets will appear only if you have edit access to them. Select the budget or line items for which you want to create an accrual request:

- In the upper part, delete all items that should not be part of the accrual request. Click the recycle bin in the table header to delete all items.
- In the picker, navigate to the items you want so select. You can only choose items with a black plus sign:



  - When the upper list shows all items you want to include, click *Continue*.

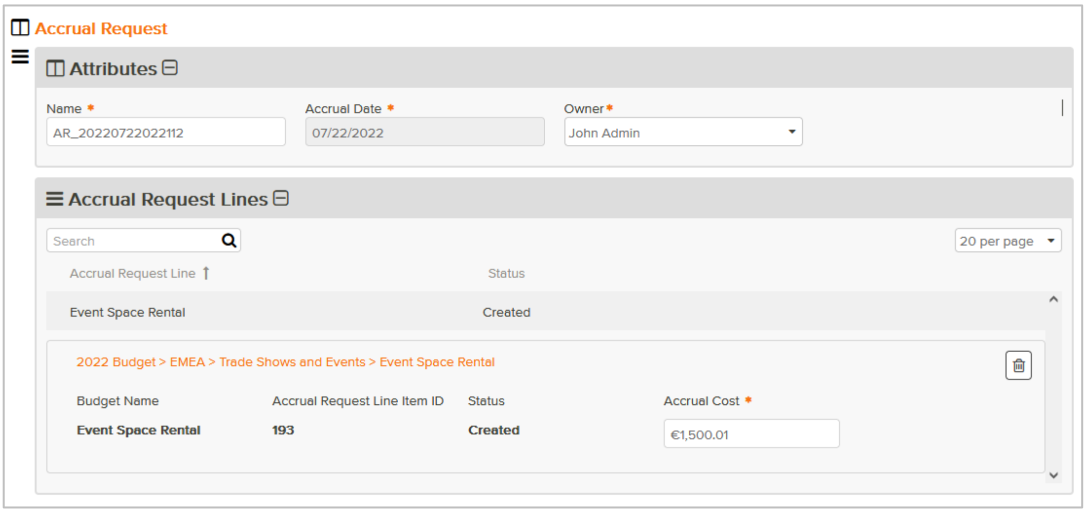
The inspection window is opened.

  - Edit the accruals properties.
  - Click *Save*.

You have created an accrual request.

5.3.2 Edit an Accrual Request

To edit an accrual request, open the inspection window.



You can change the name, owner, and workflow on the header along with any custom attributes. On the accrual request line, you can change the accrual cost and any custom attributes.

5.3.3 Request Accruals

Request an Accrual

- In the Accrual Request Grid, navigate to the accrual you want to request.
- Open its inspection window.
- In the inspection window click *Submit* or *Send*.

According to the configuration of your system, the accrual request is either submitted for approval or directly sent to the financial recipient.

Request Several Accruals

- In the Accrual Request Grid, navigate to the accruals you want to request.
- Click the Honeycomb icon for every accrual to be requested.
- Above the grid, click *Submit* or *Send*.

According to the configuration of your system, the accrual requests are either submitted for approval or sent directly to the financial recipient.

5.3.4 Approve and Reject Individual Accrual Line Items

This feature allows you to approve or reject individual Accrual Request (AR) Line Items separately, rather than approving or rejecting an entire Accrual Request at once.

Submitting an Accrual Request

1. Create your Accrual Request as usual.
2. When ready, click *Submit* at the AR level.
3. This action will submit both the AR and all its AR Lines.

Approving or Rejecting AR Lines

1. Navigate to the AR Line section within an Accrual Request.
2. For each AR Line, you'll see an approval tracking grid below the custom attributes section.

   In this grid, you'll find *Approve* and *Decline* buttons for each AR Line (if you have the necessary permissions).
3. Review each AR Line individually.
4. Click *Approve* to approve a specific AR Line, or *Decline* to reject it.
5. If you decline an AR Line, you can provide comments explaining your decision.

Checking Approval Status

The Approval tracking grid shows the following information for each AR Line:

- Approval Level
- Approver Name
- Action Date
- Status
- Comments (if any)

Re-Submitting After Changes

- If changes are made to an AR Line after approval:
    1. Update the AR Line as needed.

2. The system will prompt you to re-submit both the AR and the specific AR Line.

- If changes are made at the AR level after approval:
    1. Update the AR as needed.
    2. You'll need to re-submit the entire AR and all its AR Lines.

Viewing AR Line Approvals in *My Approvals* Screen

1. Go to the *My Approvals* screen.
2. In the *View By* dropdown, select *AR Line Approvals*.
3. You'll see a list of AR Lines submitted for your approval.

> Note
> You can approve or decline these AR Lines directly from the *My Approvals* screen. The entire Accrual Request is considered approved only when all its AR Lines have been approved. You'll receive notifications about AR Line submissions, approvals, and rejections as per your notification settings. If you're unsure about using this feature, please contact your system administrator for assistance.

5.3.5 Delete Accrual Requests or Their Items

Attention! Data Loss!

The deletion of one or several accrual requests cannot be reverted.

Deleting an accrual request has no effect on line items and budget items. After deletion, they will be eligible again for the creation of an accrual request.

Note

If you delete an accrual, then all its accrual line items will be deleted. If an accrual has one accrual line item and the accrual line item is deleted, then the accrual request will also be deleted.

Delete an Accrual Request

- In the Accrual Request Grid, navigate to the accrual you want to request.
- Open its inspection window.
- In the inspection window, click the recycle bin icon.

The accrual request is deleted.

Delete Several Accruals Requests

- In the Accrual Request Grid, navigate to those accrual requests you want to delete.
- Click the Honeycomb icon for every accrual request or their items to be deleted.
- Click the recycle bin above the grid.

A confirmation prompt is displayed.

- Click *Yes*.

The requests are deleted.

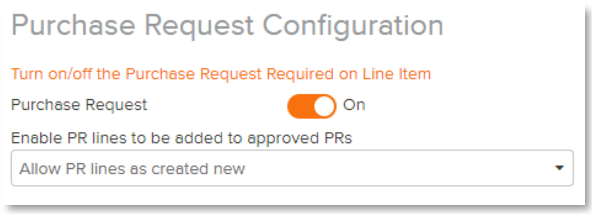
6 Purchase Support

6.1 Settings for Purchase Support

There are several settings that impact the purchase support module. It must first be turned on by your customer success team in organizational setup, where you will also need to decide if and how new PR lines can be added to already approved PRs.

The choices are to:

- Not allow it at all
- Treat new lines as “new”
- Treat them as “updates”



There are role-based security entries for editing purchase requests, access to the purchase request grid and access to the PR Dashboard in reports.

Edit access can be further restricted by denying edit access to the content of a specific team under “teams”.

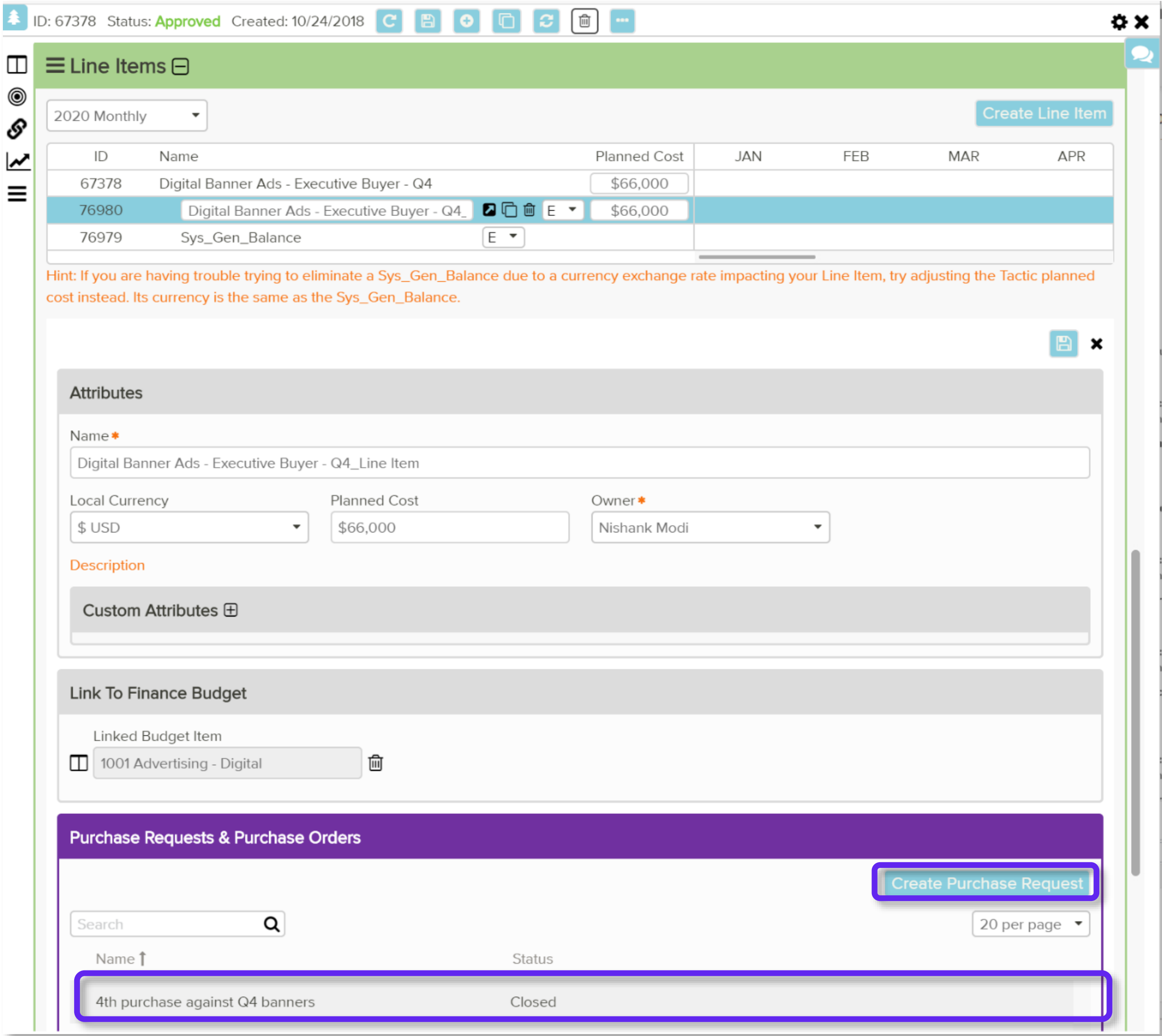
6.2 Creating Purchase Requisitions

There are some general rules for creating purchase requisitions that must be followed. While you can create PRs for any status of tactic, you can only submit PRs for approval if their parent tactics are “approved.”

A PR line’s amount cannot exceed the amount of its parent tactic line item (less any other PR line amounts already in place).

Approved PRs cannot be deleted, but they can be closed out. Closing out a PR will reduce the amount of its lines to match the invoiced amount posted to free up any remaining balance.

6.2.1 From the Tactic Inspection Window



Users can create purchase requisitions or edit them from the tactic inspection window within the line item section after selecting the tactic line item for which they want to add or edit a PR.

All the related PRs will be listed with their status. Clicking on a PR will expand it for editing or viewing, depending on the user's access. There is a "Create Purchase Request" button for creating new purchase requests.

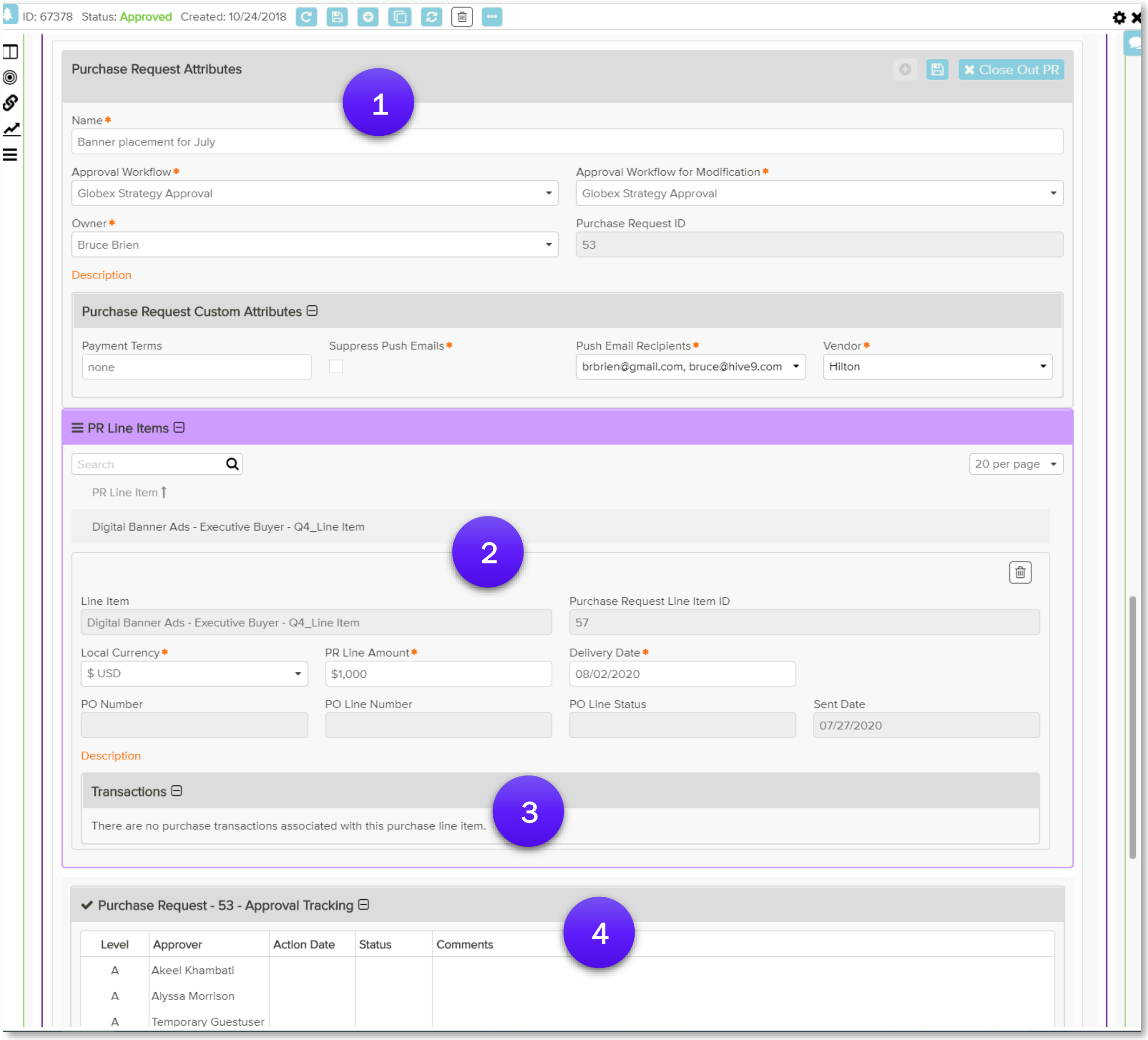
Once you are in the purchase request section, it works like any other area. You can add a name and a vendor and save the request, but you must fill in any required fields before submitting for approval.

A single PR line will be automatically created for the balance remaining on the tactic line item. This amount can be edited down if you need to split the

PR into more than 1 line. The sum of your PR lines cannot exceed the amount of your tactic line item.

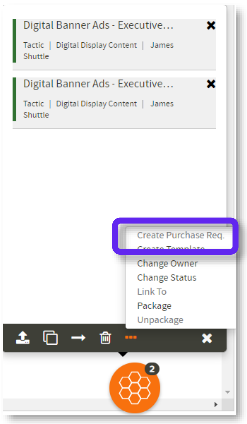
The screenshot below displays the 4 sections of a Purchase Request, as follows:

- The Purchase Request (Header) contains the vendor and any other custom attributes needed at this level
- The PR Lines contain the specific request amounts and delivery dates that goods or services are needed
- The transaction block will display any related imported transactions, like good receipts, invoices, and credits
- The approval tracker contains a record of who was asked to sign off and who actually did sign off, along with any comments that were provided.



6.2.2 From the Honeycomb

Purchase Requisitions can also be created from the honeycomb feature on the plan grid. Simply select the honeycomb on the line items in the plan from which you would like to generate the PR, and then navigate to the large honeycomb in the lower-right corner and click on it. Then click on the three dots to expand the "...additional actions" menu and choose "Purchase Request" from the list.

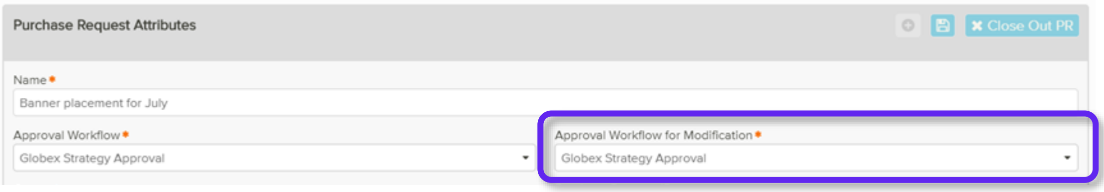


6.3 PR Approvals and Modifications

Basic PR approvals are available, and a reference to how they work can be found in chapter 10.10.

Advanced Workflow Approvals are also available, and a reference can be found in chapter 10.10.1.

Before approving a PR, all required fields or attributes (designated with an orange asterisk*) must contain a value. When a required field or attribute on a PR or PR line is modified, it must be re-submitted for approval. Modified PR approvals can have an alternate approval route designated as a default at the team and user level that is propagated to the PR.



Modified PR approval thresholds are based on the delta or change in the PR amount from the previous approved state. The amount displayed in your approvals grid for a PR Update will be the delta as well.

If a modified PR is declined, the user will have the option to “Revert” the PR to its last “approved” state.

See below for an approval tracker with signoffs:

✔ Approval Tracking ⊟

Level	Approver	Action Date	Status	Comments
A	Alyssa Morrison			
A	Darin Hicks			
A	Robert Gonzalez			
A	SFDCPartner Demo...			
A	Bruce Brien	07/29/2020	Approved	
B	Bruce Brien	07/29/2020	Approved	
B	Darin Hicks			
B	Alyssa Morrison			
B	Robert Gonzalez			
B	SFDCPartner Demo...			

6.4 PR Integrations and Transactions

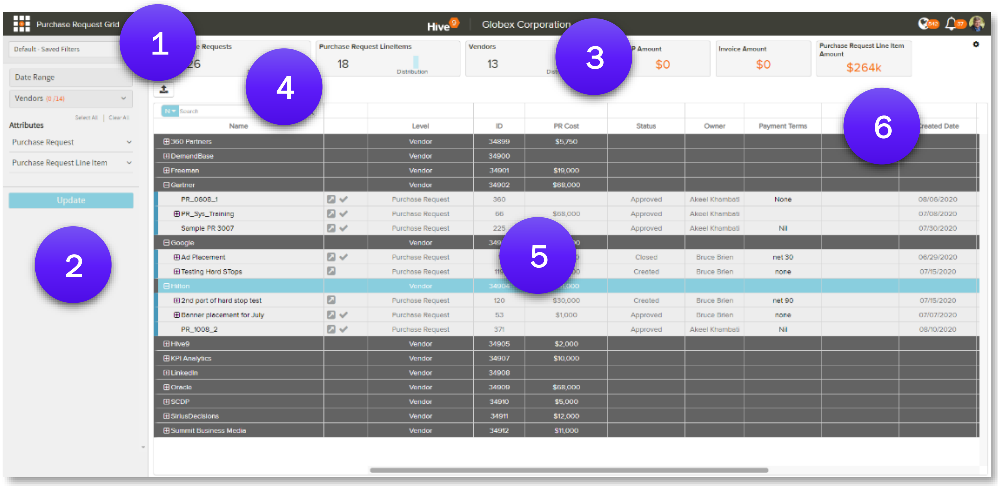
Hive9 Purchase Support can be easily integrated with purchasing systems. The integration is file-based and may be run as frequently as hourly or as drawn out as monthly.

Users can configure PRs to be sent as e-mails or via SFTP to be consumed by their Purchasing system. Users control the mapping and the order that pushed fields are sent in. Different mappings can be used for new versus modified PRs. Users can also configure a “Pull” integration to read exported files from the purchasing platform and mapping that data back to Hive9. The mapped data can update attributes directly on the PR, such as PO Number, or can post a transaction if it has one of 3 IDs associated with it: a goods received ID, a service entry ID or an invoice id.

Mapped transactions have the option to be approved (or accepted), thereby triggering another “push” to acknowledge the “acceptance.”

> **Note**
>
> When transactions are posted, Hive9 will augment existing transactions where possible before adding new ones. This enables us to match the corresponding receipt and invoice IDs to the PO on a single line. We only record multiple lines if there were multiple receipts or invoices involved.

6.5 The PR Grid



The PR Grid works similar to the Plan Grid with column management, column movement, and a configurable heads up display, and support for custom attribute filters and saved views, as well as an export feature.

- Saved Views
- Filter Panel
- Heads Up Display
- Export
- Main Grid
- Column Management

6.6 The PR Dashboard

See the [PR Dashboard] in Reports.

7 Performance and Dashboards

7.1 Integration Considerations for Performance

While plan performance can be entered manually, it makes more sense to deploy Hive9 connectors to populate the performance data needed for performance reporting to add real value.

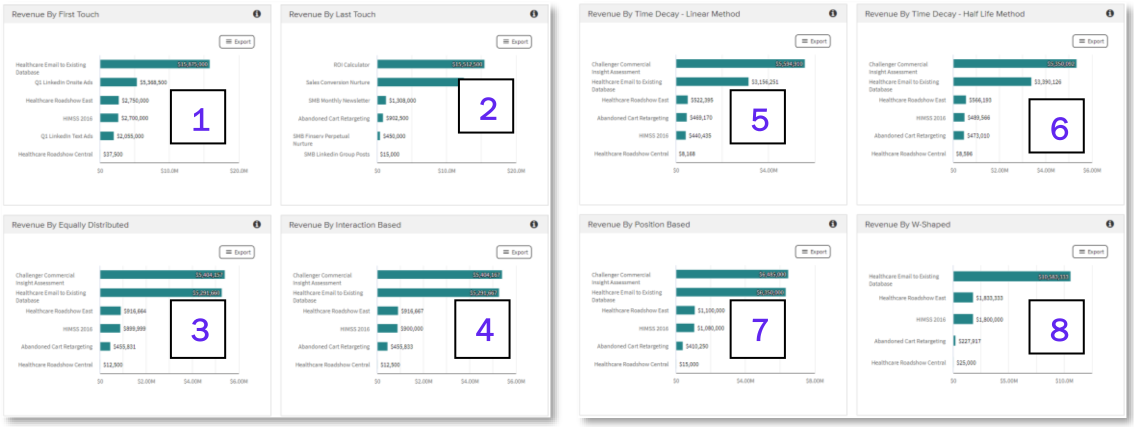
Hive9 is supported by 2 database architectures, a traditional relational structure for plans and budget, and a star schema for performance reporting. The databases are called “Plan” and “Measure.”

The star schema enables us to collect various data from different systems and relate it back to a tactic in the plan, which connects us to all the costs and segmentation needed for full analysis.

Performance data can be mapped and loaded as a “one off” for special events, or a Hive9 connector can be deployed. We support various connectors for web analytics, marketing automation, CRM and lead progression. Contact your customer success manager for an updated list of specific connectors or to discuss a new connector.

Some connectors drive the standard reports discussed below, while others drive custom dashboards developed and maintained by the Hive9 Customer Success team.

7.2 Advanced Attribution Models



Hive9 Supports the 8 attribution models above, and your customer success team can help you get them set up.

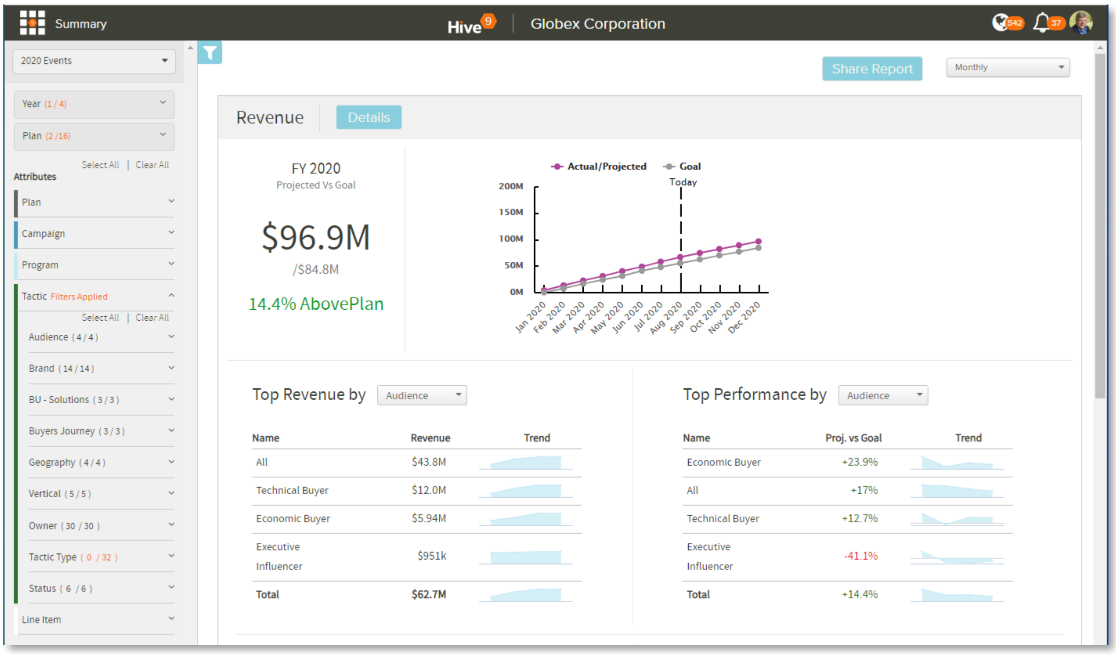
- *First Touch* – all credit goes to the first touch
- *Last Touch* – all credit goes to the last touch
- *Equally Distributed* – all touches get equal credit
- *Interaction Weighted* – Your organization can weight each interaction type, and the weighting is applied to the equal distribution
- *Linear Time Decay* – All interactions count, but newer interactions get more weight
- *½ life Time Decay* – Similar to the linear time decay, but skewed significantly in favor of more recent activity (good for shorter demand cycles)
- *U-shaped position model* – First and last touch get equal weighting
- *W-shaped position model* – First touch, last touch and the “lead” inflection point get equal credit

We also support a custom statistically inferred model that users can work with our client success team to activate.

> Note
>
> Users can choose one of these 9 models as the source for ROI calculations in the rest of the performance module.

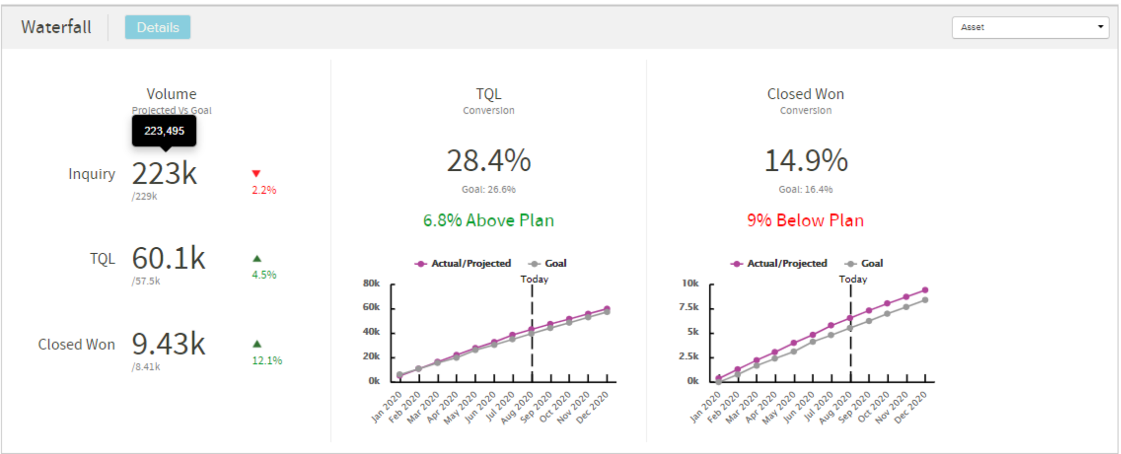
7.3 Standard Dashboards

7.3.1 Summary

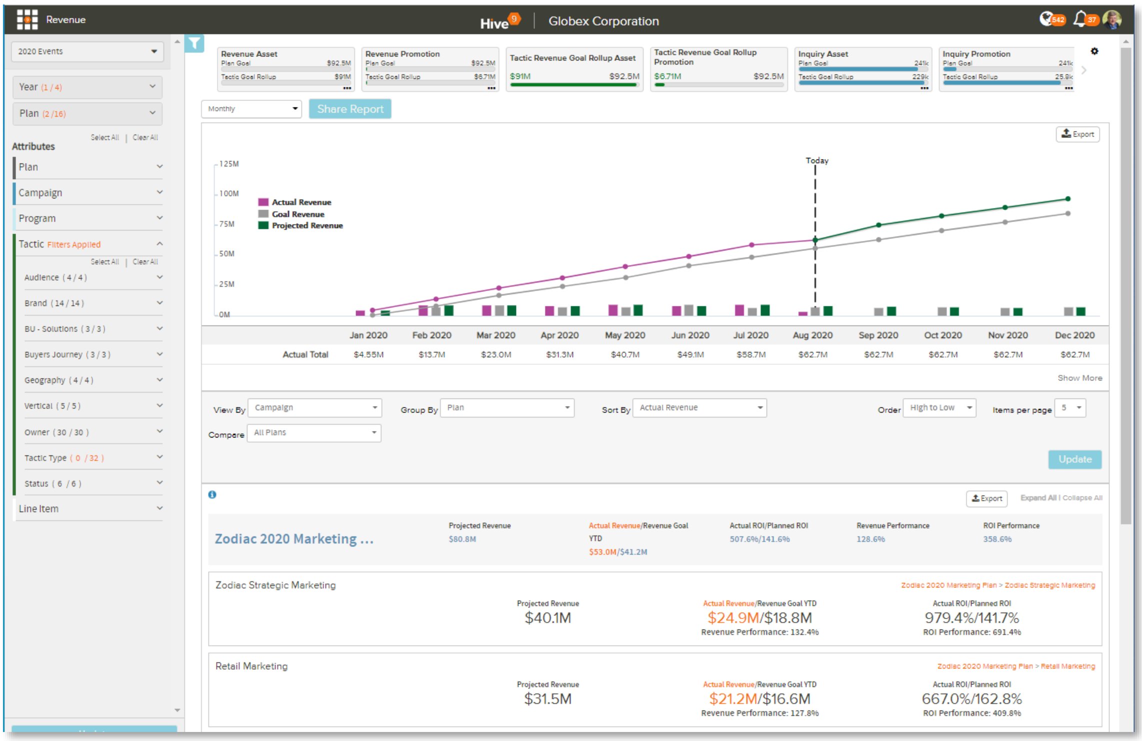


The *Summary* dashboard is broken into 2 sections. The upper section (above) contains the revenue prediction for the selected plans as well as a set of charts for the top-performing segments by Revenue, Cost, Performance to Goal, and ROI based on your designated attribution model. Users can use the drop-downs to change the segments.

The lower section (below) contains high-level waterfall statistics for volume at each stage and conversion rate performance compared to plan at each stage. Clicking "Details" brings up the Waterfall report, see chapter 7.3.3. The same filtering available on the plan grids is available here as well.



7.3.2 Revenue



This *Revenue* dashboard is one of several flavors of stack ranking dashboards. It focuses on revenue while one of the others can be configured for any stage, including revenue, and the last one focuses on the plan budget.

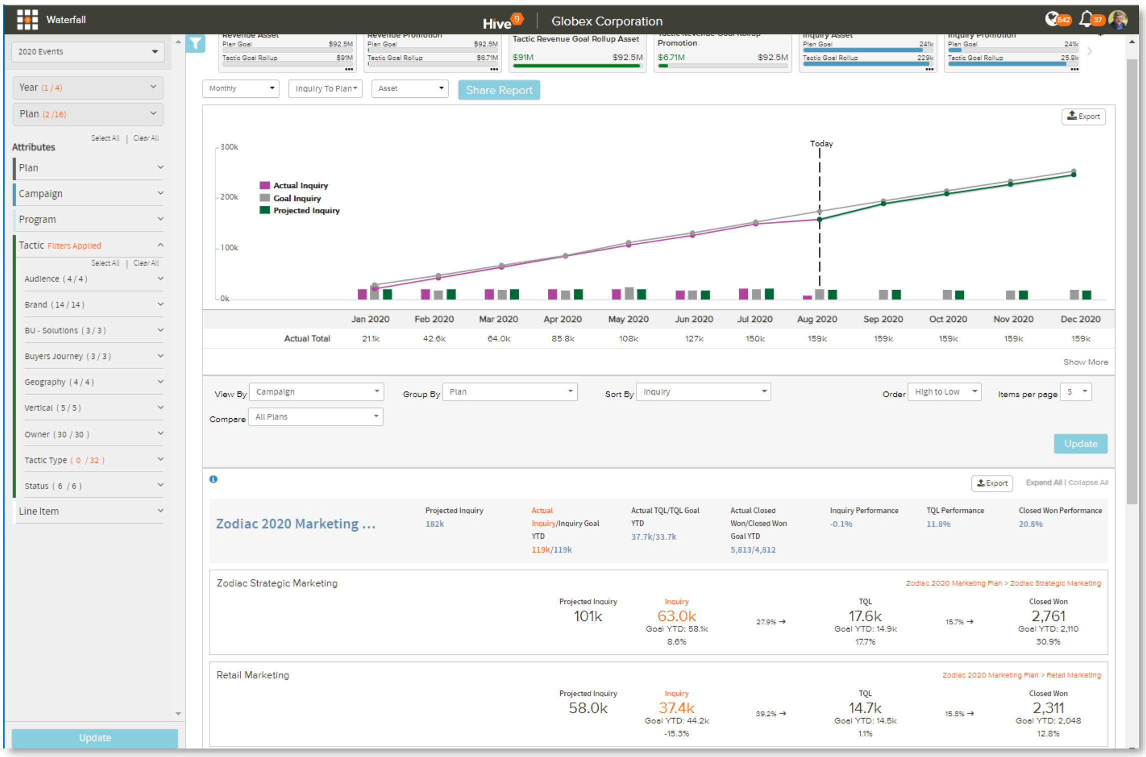
The upper part of the chart shows your performance versus your goal over the course of the plan year until today. From today forward, it shows the model's prediction of your performance compared to your goal for the remainder of the year. Any investment change impacts that are made will immediately be reflected in a "refreshed" dashboard view. The user can decide how to view and sort the ranking in the middle selection with all the dropdowns.

The lower section contains the grouped plan elements and their waterfall performance and predictions stack ranked per the user's selections. There are always 2 layers shown. Clicking on a lower level layer graduates that layer to the upper layer and displays the next level down as the lower layer.

On any lower level, users can click on the orange bread crumb trail in the upper-right corner of the entry to navigate directly to the plan object being referenced in order to take immediate action.

The same filtering available on the plan grids is available here as well.

7.3.3 Waterfall



This *Waterfall* dashboard is the second flavor of stack ranking dashboard. It can be configured for any stage, including revenue, by using the dropdown above the chart. This dashboard can be reached from the menu or from the Summary dashboard, see chapter 7.3.1

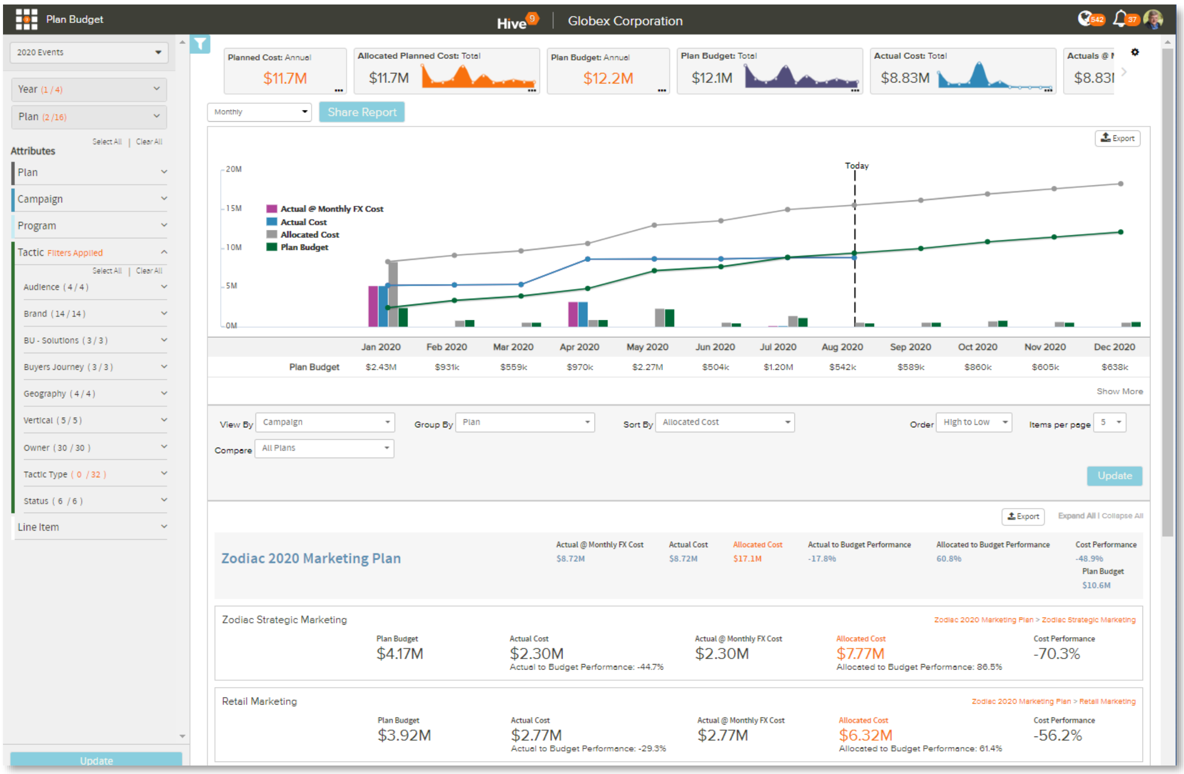
The upper part of the chart shows your performance versus your goal over the course of the plan year up until today. From today forward, it shows the model's prediction of your performance compared to your goal for the remainder of the year. Any investment change impacts that are made will immediately be reflected in a "refreshed" dashboard view. The user can decide how to view and sort the ranking in the middle selection with all the dropdowns.

The lower section contains the grouped plan elements and their waterfall performance and predictions stack ranked per the user's selections. There are always 2 layers shown. Clicking on a lower level layer graduates that layer to the upper layer and displays the next level down as the lower layer.

On any lower level, users can click on the orange bread crumb trail in the upper-right corner of the entry to navigate directly to the plan object being referenced to take immediate action.

The same filtering available on the plan grids is available here as well.

7.3.4 Plan Budget



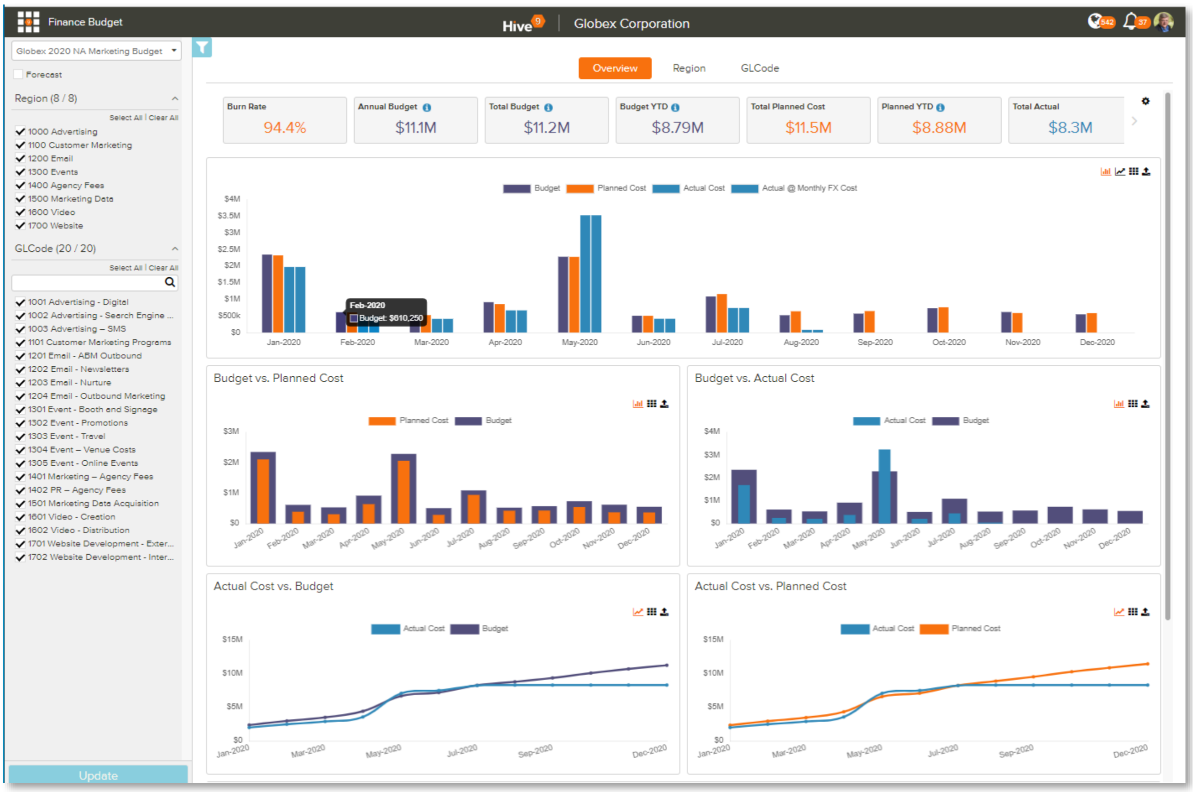
The *Plan Budget* dashboard provides a detailed visual of what is being spent from a campaign and program point of view over time.

The basis of the chart is to look at budgets, actual costs, currency converted actual costs, and allocated or planned costs over time with only the budgets and the allocated (planned) costs projecting into the future.

Users enjoy the full suite of plan filters, a separate heads-up display, control over the timeframe, the grouping and sorting, and what they want to compare.

The stack ranking and ability to navigate to the details, as well as to export, are all still available.

7.3.5 Finance Budget



The *Finance Budget* dashboard is a simple set of comparisons between your budgets, planned costs, forecasts, and actuals from the construct of your financial budget instead of your marketing plan.

It will be cost center- and GL code-focused and has its own heads-up display at the top of the screen that can, of course, be configured.

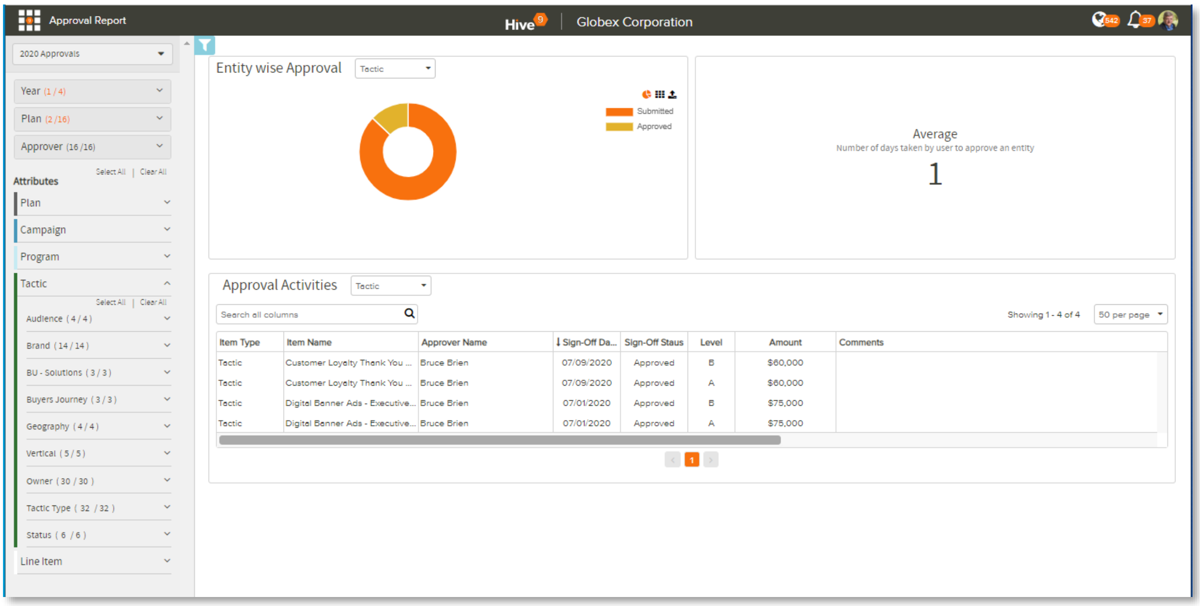
The charts can be rendered as bar charts, line charts or tables. They can also be exported at any time.

The tabs will be automatically generated based on the level depth of your financial budget and will be named based on what you set up in your organizational settings.

After the time-based charts on the first tab, you will be presented with a series of pie charts to explore the distribution of your investments. The pies are presented as donuts but offer the same capabilities, including exporting.

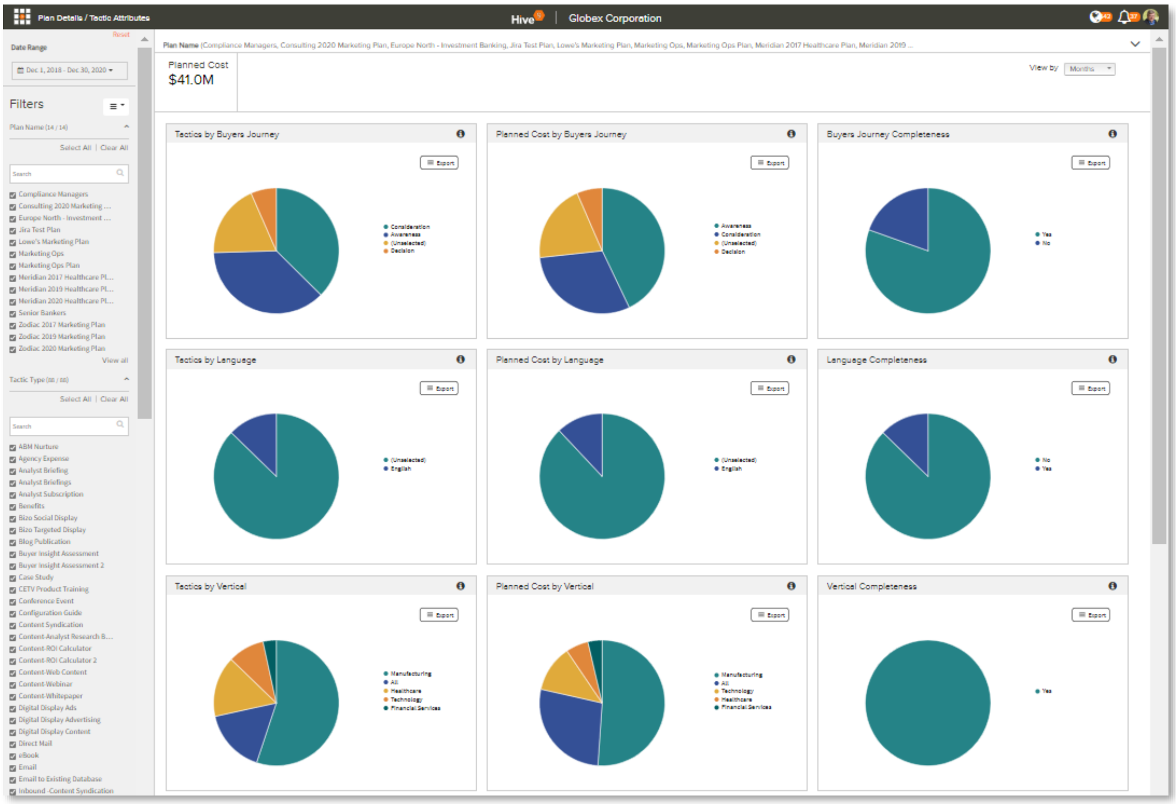
The filters are based on the elements of your budget.

7.3.6 Approvals Dashboard



The *Approvals* dashboard is a simple dashboard with full plan filtering capability that shows the current status of approvals in the upper left, the average approval time in days in the upper right, and a configurable and searchable grid of approvals at the bottom for review purposes.

7.3.7 Plan Details

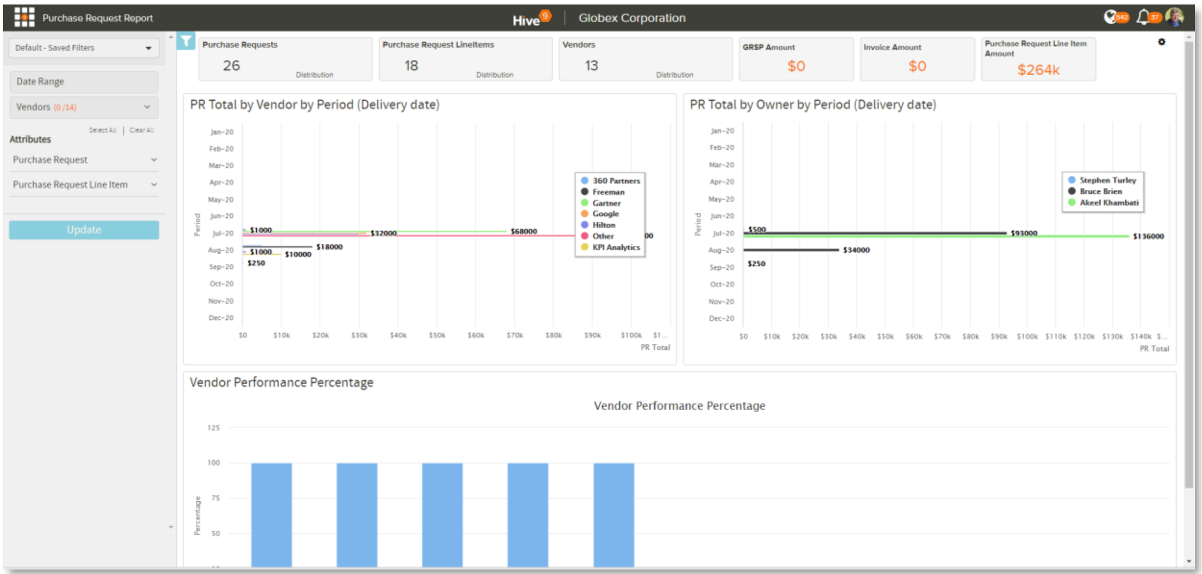


The *Plan Details* dashboard is a self-configuring dashboard designed to showcase the segmentation across your plans at any level. The tactic level is shown in the screenshot above, but it is also available for the campaign and program levels.

Each column shows one aspect of how your segmentation is balanced. At the tactic level, the first column will always show how your tactics are distributed by that element of your segmentation. The second column will re-cast the same data, but the chart will be based on the planned cost distribution and not the count. The final column will show you the completeness of the data so that you can see whether you have a compliance issue.

There will be a row for each attribute at that level of your plan. The individual charts can be exported as well.

7.3.8 PR Dashboard



The *Purchase Request* dashboard has a configurable heads up display, a set of PR related filters and 3 charts.

The first chart shows your expected commitment to each vendor bucketed by the delivery date period on the PR line. The second chart shows the same data, but instead of by vendor, the chart is grouped by the PR owner listed on the PR record.

The last chart at the bottom shows delivery performance for each vendor – provided you are importing receipt transactions.

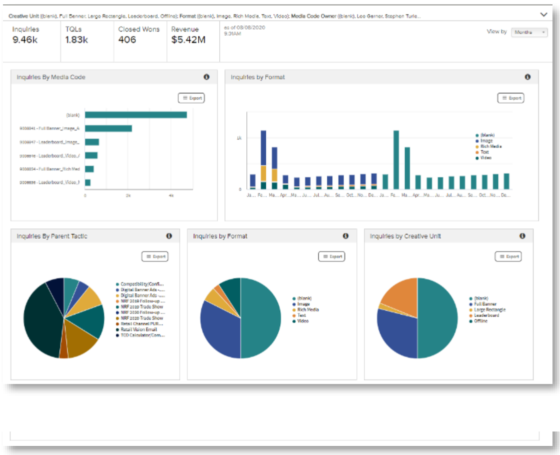
7.4 Custom Reports and Dashboards

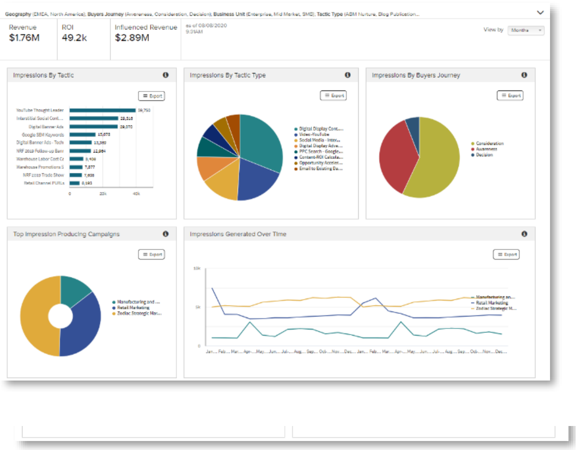
With all the data available in Hive9 and all the data being imported into Hive9, there are almost an unlimited number of reports and dashboards one could conceive of.

Our client success team stands ready to listen to your needs and develop the specific dashboards you need to drive your organization towards its goals.

Our custom dashboards are maintained for you and updated to remain consistent and functional from release to release. They can include heads up displays, left side panel filters, export features and configurable charts.

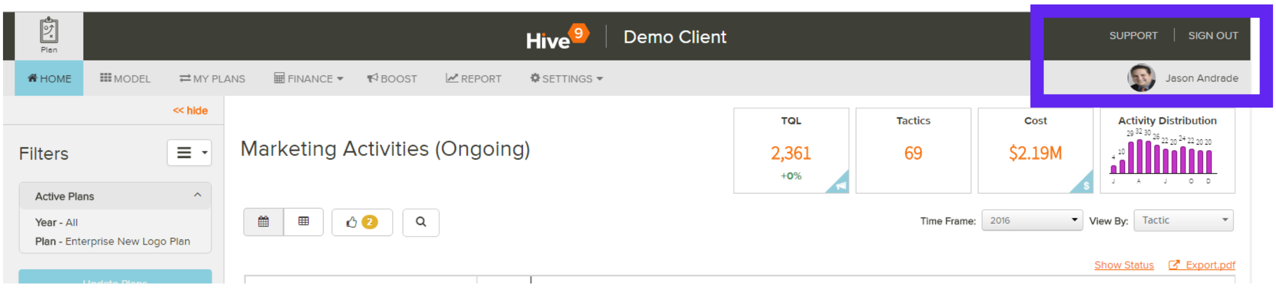
Some examples below:





8 Support – In application request

In the upper right-hand corner of the application, you can log a support request. Response times are based on support package commitment.



9 FAQs

9.1 Permission, Roles, and Teams

Can I be on multiple teams?

Yes, users may belong to multiple teams. Each team will have its own rules for collaboration, so if a user can approve for one team, they may not have the ability to approve for the other team to which they belong.

Can I have multiple roles?

No, users may only have one role.

Can I approve my own Tactics?

It is possible. This is determined by your Approval Workflows. Your system administrator can edit the Team settings to determine who has approval permissions on any Team.

I can see Programs and Campaigns within my Plan but cannot edit them. Why not?

Your Role permissions determine whether you can create, edit or delete items at Plan, Campaign, Program, and Tactic level. This is set by your system administrator.

Why can't I see Tactics assigned to another department in the Plan?

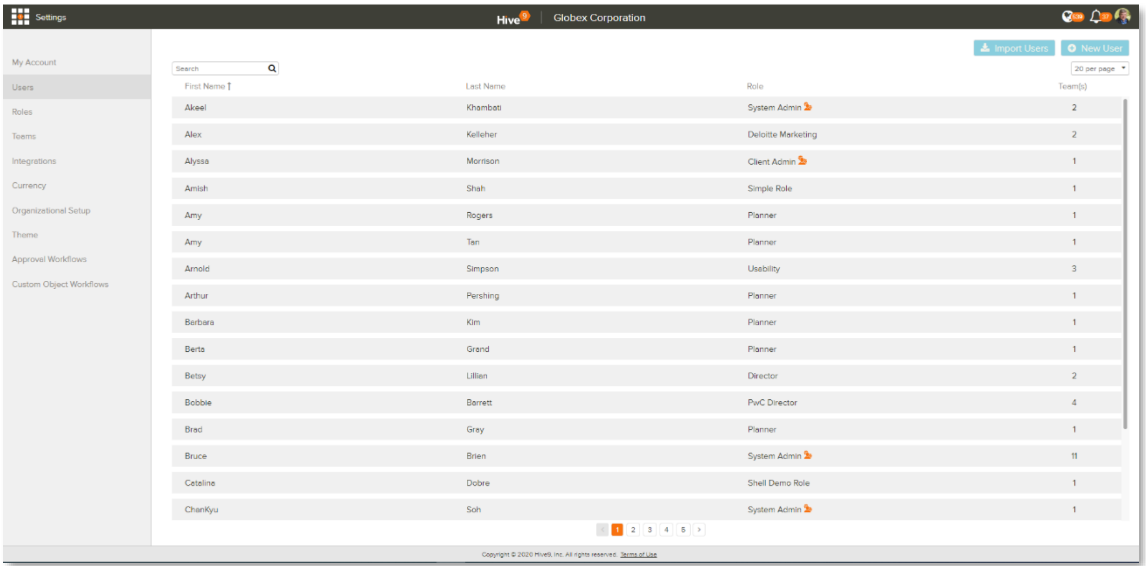
Your Role determines whether you can see content owned by members of another Team. This is set by your system administrator.

10 Administration

Note

You must have administrator permissions allowing you to execute the step-by-step procedures in this chapter. If you cannot execute but need to, contact your Client Administrator.

10.1 Users



10.1.1 Create User

- Click > *Menu* > *Settings* > *Users*.
- Click *New User* in the top-right corner.
- Edit the settings. You must fill at least the mandatory fields marked in red.
- Assign the user to at least one team. For more information, see chapter 10.4.
- Click *Save* in the top-right corner.

You have created the user.

10.1.2 Edit User

- Click > *Menu* > *Settings* > *Users*.
- If you do not see the user directly in the list, use the search bar to find the user.
- Click on the user's entry.

The user's profile opens.

- Make any edits as needed.
- Click *Save*.

You have edited the user.

10.1.3 Delete User

When deleting a user, you can reassign their owned objects to another active user to maintain data continuity:

- Click > *Menu* > *Settings* > *Users*.
- If you do not see the user directly in the list, use the search bar to find the user.
- Click on the user's entry to open their profile.
- Click *Delete* in the bottom-right corner.
- In the deletion confirmation dialog, you'll see:
- A list of all objects owned by the user (Initiatives, Activities, Line Items, Purchase Requests, etc.)
- Two ownership options
- Keep the Ownership of Hive9 objects to same user (Only editable by Admins
- Reassign Ownership of Hive9 objects to other user. Click *Yes* to confirm.
- Select your preferred ownership option.
- Click *Continue* to proceed or *Cancel* to leave.

> Note
>
> If no reassignment is made, these objects will retain ownership to the deleted user and will become Admin-editable only.

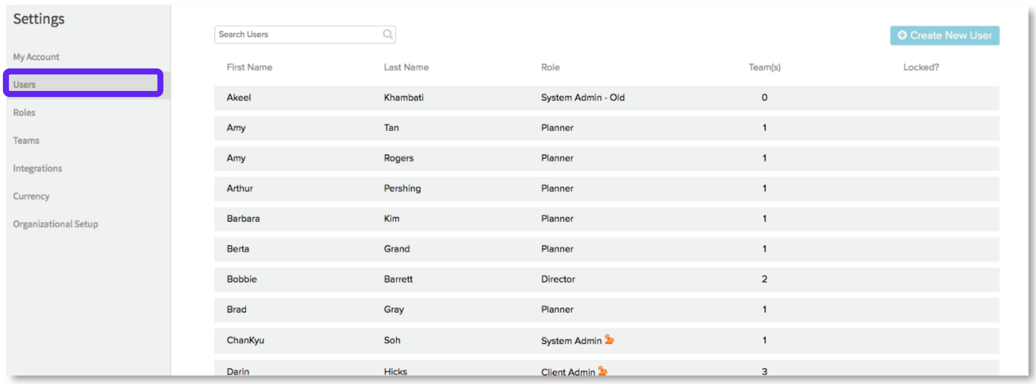
What happens next?

- If “Reassign Ownership of Hive9 objects to other user” option is selected, then all objects owned by the deleted user are automatically reassigned to the selected user
- If “Keep the Ownership of Hive9 objects to the same user (Only editable by Admins” option is selected, then all objects are still owned by the deleted user, but they become non-editable for all other users except for Admins.
- The new owner receives notifications (email and/or in-app) about their newly assigned objects
- The ownership changes are recorded in the audit trail, including:
    - Original owner
    - New owner
    - Timestamp
    - Affected objects

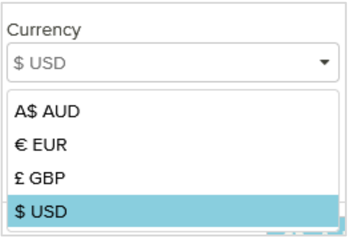
You have deleted the user.

10.1.4 Assign a Default Currency to a User

- Click > *Menu* > *Settings* > *Users*.
- Click on the user to whom you want to assign a default currency.



- In the Currency field, select the user’s default currency.



- Click *Save*.

The user's default currency is now saved.

10.1.5 Assign a Role or Team to a User

Users must be assigned a role in the application.

- Click > *Menu* > *Settings* > *Users*.
- If you do not see the user directly in the list, use the search bar to find the user.
- Click on the user's entry.

The user's profile opens.

- Use the dropdown to select the Role.
- Click *Add Team* and select the team you would like to assign the user.
- Click *Save*.

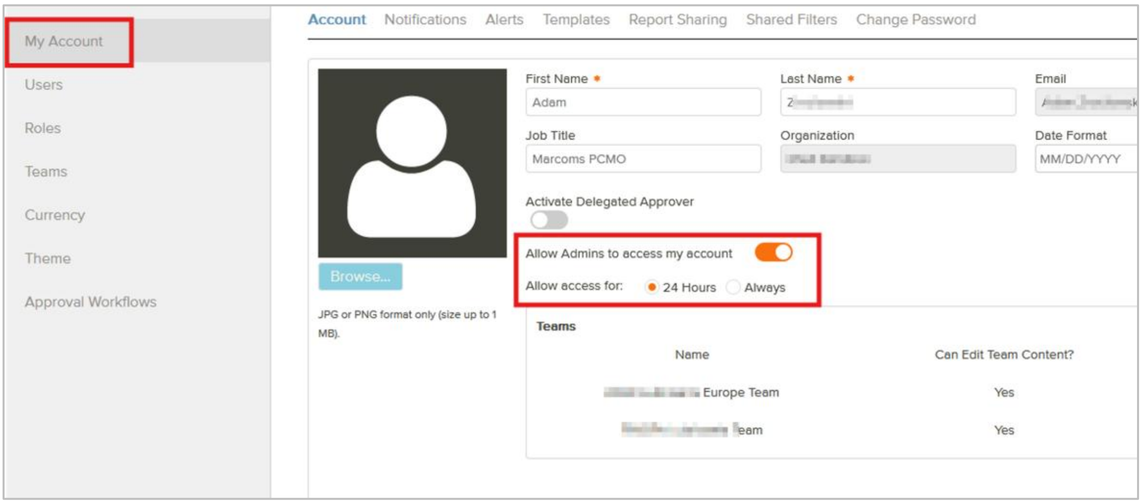
You have assigned a role or team to the user.

You can also use the Roles and Teams pages to assign users to their respective roles and teams.

10.2 Admin User Impersonation

This feature lets administrators log in as regular users to provide better support and troubleshooting. Administrators can experience exactly what users see without affecting their user session data or workflow.

10.2.1User Privacy Settings for Regular Users

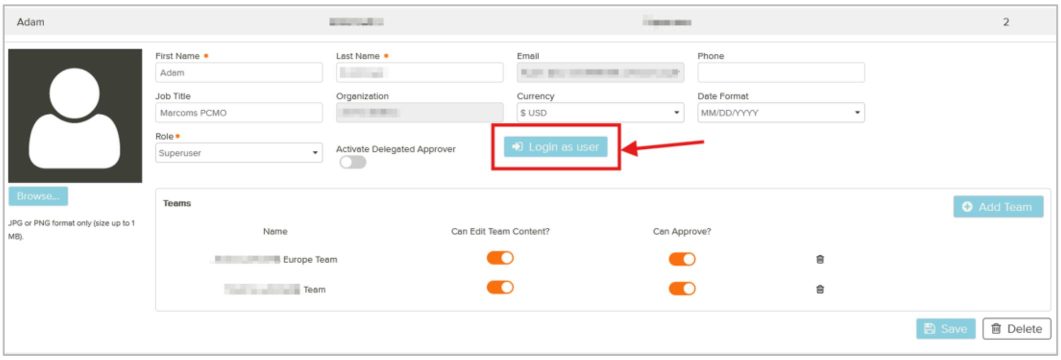


- Access your account settings through **My Account** in the left navigation.
- The **Allow Admins to access my account** toggle controls administrator access to your account:
- OFF: No administrator can access your account (default setting).
- ON: Administrators can access your account based on your time preference.
- Choose one of these options under **Allow access for**:
  - **24 hours** (default): Grants temporary access.
  - **Always**: Grants continuous access until turned OFF.

10.2.2 Administrator Access

Accessing User Accounts

- Navigate to the **Users** page
- Locate the user who has set admin access to ON



- Click the **Login as user** button in their profile
- You now see Hive9 exactly as the selected user does

While Using a Regular User's Account

- The admin's session is replaced by the user's session.
- You see exactly the same interface, permissions, and restrictions as the user.
- A banner at the top indicates you're in impersonation mode
- All your actions are logged with your admin identity. This includes admin's identity, timestamp, and actions.
- As an admin, you cannot access:
- The user's **My Account** settings
  - **Sign-out** functionality of the logged-in user

Returning to Admin View

Click **Back to Admin View** in the header section of the screen which allows you to return to your administrator account.

- The user session ends
- The admin's original session is restored
- The admin is redirected to their **My Account** page

Important Notes and Restrictions

- Administrators cannot impersonate other administrators
- User permission is required and can be revoked at any time
- Regular users cannot access other user accounts
- Cross-organization impersonation is not possible

Quick Start Guide For Users

1. Go to **My Account** page.
2. Set **Allow Admins to access my account** toggle to ON.
3. Choose your preferred access duration: **24 hours** or **Always**.
4. Save your settings.

Quick Start Guide For Administrators

1. Navigate to the **Users** page.
2. Find the user who granted admin access.
3. Click **Login as user** next to their profile.

   You are now viewing the platform as the selected regular user.
4. Complete your tasks.
5. Click **Back to Admin View** when finished.

10.3 Roles

Roles are a collective set of permissions that are assigned to users that dictate what features a user can see and use within the application. When a role's permissions are edited, those permissions changes are propagated to all the users who have that role assigned to them.

Admin Roles

Users who are assigned the *Client Admin* role in the application will have access to all the features and content inside the application; for this reason, we advise that you carefully consider any users who are given this role. The *Client Admin* role cannot be copied, edited or deleted, and at least one user must be assigned this role. All clients will have an additional *System Admin* (a Hive9 representative) assigned to their instance that will be able to assist in permissions setup and troubleshooting.

Content Settings in Roles

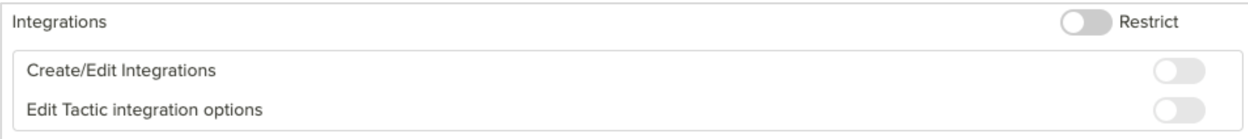
There are a couple of content settings on roles that are important to understand.

The first limits the content that a user can see to the teams that they belong to, prohibiting them from seeing the content of other teams.

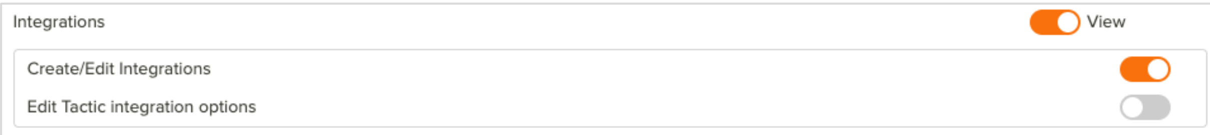
The second limits access to financial information only. This is a good way to offer agency partners access to plans but not to your financial data.

Integration Settings in Roles

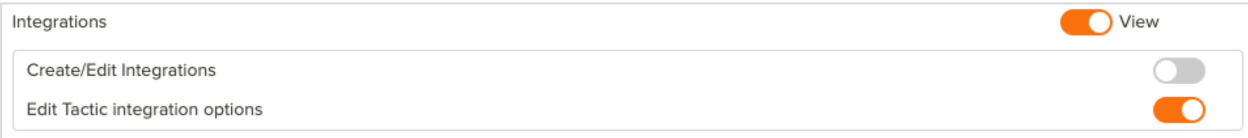
When the setting for the entire Integrations section is set to *Restrict*, users with the role will be treated as if both options are set to *OFF*, as below.

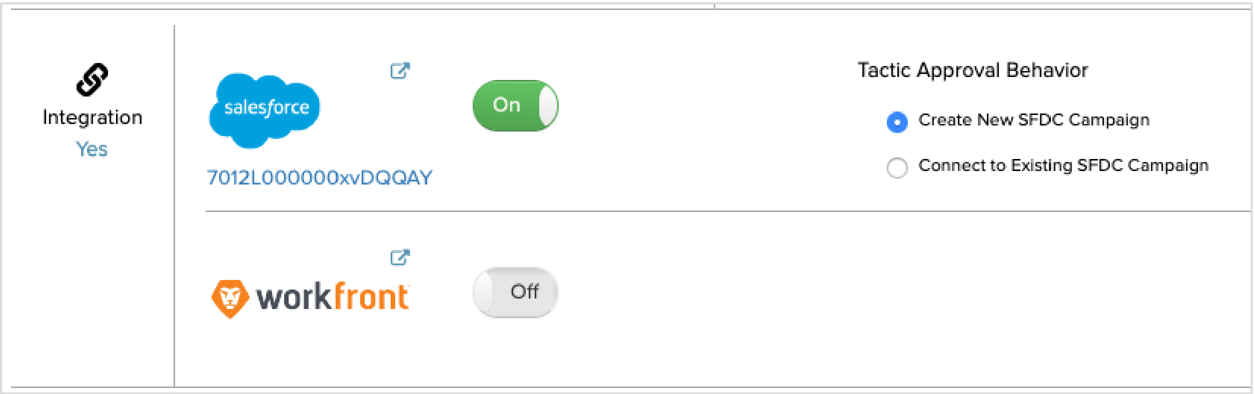


When the *Create/Edit Integrations* setting is set to the *ON* position, users with the role may see and edit anything in the *Settings > Integrations* section.

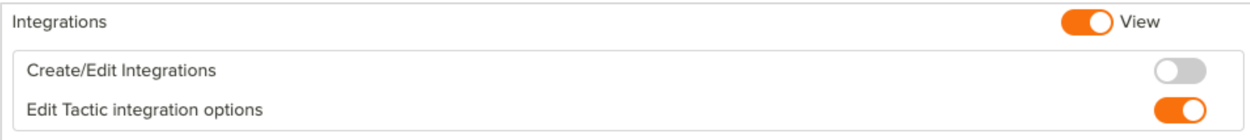


When the *Edit Tactic Integration Options* setting is set to the *ON* position, users with the role may edit anything on the Tactic Review Tab regarding integrations. All buttons will be functional.





When the *Edit Tactic Integration Options* setting is set to the *OFF* position, users with the role may not edit anything in the Integrations Section of the Tactic Inspection Window. All functional buttons will be grayed out and non-functional.



Snapshots

Taking and opening snapshots is gated by permissions for both plan and finance budget snapshots.

Name	Description
Snapshots - View	User can see the snapshots and open any snapshot from gallery.
Snapshots - Create/Edit/Delete	• User can take snapshots. • User can edit the name of the snapshot. • User can delete the snapshot.

10.3.1 Create Role

- Click > *Menu* > *Settings* > *Roles*.
- Click *New Role* in the top-right corner.

The page with the role settings is displayed.

- Edit the role's name.
- Set the permissions on Plan, Measure, and Notification tabs.
- Click *Save* in the top-right corner.

You have created the role.

10.3.2 Edit Role

- Click > *Menu* > *Settings* > *Roles*.
- If you do not see the role directly in the list, use the search bar to find the role.
- Click on the role's entry.

The role's profile opens.

- Click the *Edit* icon in the top-right corner.
- Make any edits as needed.
- Click *Save*.

You have edited the role.

10.3.3 Delete Role

- Click > *Menu* > *Settings* > *Roles*.
- If you do not see the role directly in the list, use the search bar to find the role.
- Click on the role's entry.

The role's profile opens.

- Click the *Delete* icon in the bottom-right corner.

A security prompt is displayed.

- Click *Yes*.

If the role is still assigned to at least one user, a dialogue will open.

- Select a different role for these users
- Click *Continue*.

You have deleted the role.

10.4 Teams

Teams are groups of users that collaborate on specific content and define how team members interact with each other's content. The following team rules will define who can edit any content owned by the team, and which users can approve tactics submitted by the team.

Team Collaboration Rules

Rule	Description
Can Edit Team Content	Users that are marked *Yes* under *Can Edit Team Content* will be able to edit all content owned by the members of that team. If *No* is marked, then the user will only be able to edit content that he or she owns.
Can Approve for Team	Users that are marked *Yes* under *Can Approve* will be able to approve tactics for that team. If a user is marked *No* that user will not be able to approve any tactics. At least one member of each team must be marked *Yes* for this rule. Note: If approval workflows are turned on, only users with a *Can Approve* status of *Yes* will be eligible to be included in approval workflows. Eligibility is on a team-by-team basis. For more information on approval workflows, see chapter 0.

10.4.1Create Team

- Click > *Menu* > *Settings* > *Teams*.
- Click *New Team* in the top-right corner.
- Edit the settings. You must fill at least the mandatory fields marked in red.
- Click *Save* in the top-right corner.

You have created the team.

10.4.2 Edit Team

- Click > *Menu* > *Settings* > *Teams*.
- If you do not see the team directly in the list, use the search bar to find the team.
- Click on the team's entry.

The team's profile opens.

- Click the *Edit* icon in the top-right corner.
- Make any edits as needed.
- Click *Save*.

You have edited the team.

10.4.3 Delete Team

Users who were assigned a team that is being deleted will not be able to access plans or budgets that the team was assigned to. Users who belonged to a deleted team will need to be added to a new team or a team that is already assigned to the plans or budgets they were previously.

- Click > *Menu* > *Settings* > *Teams*.
- If you do not see the team directly in the list, use the search bar to find the team.
- Click on the team's entry.

The team's profile opens.

- Click the *Delete* icon in the bottom-right corner.

A security prompt is displayed

- Click *Yes*.

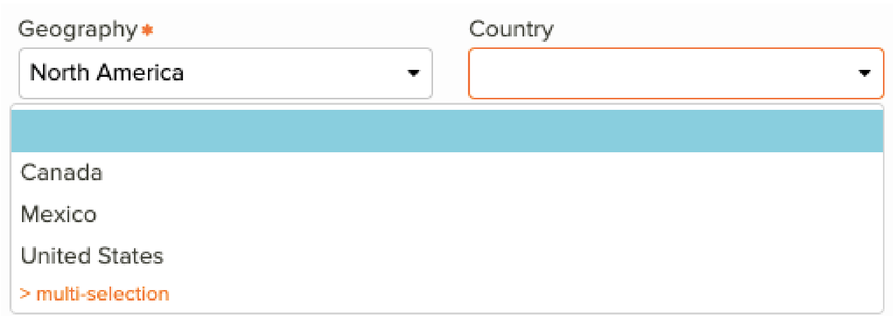
You have deleted the user.

10.5 Customer Attribute Considerations

- Attributes can be created with a dependency to other attribute fields or field values.

Dependencies allow “child” Attribute values to be limited based on the selection made on the “Parent” level. In this example, the *Region* is the Parent and the *Country* is the Child.

By Selecting North America in the Parent *Region* attribute, Child *Country* values are limited to North American Countries.



- Attributes entered at a lower level can be rolled up into the next layer above in the hierarchy on the grids.
- Attributes can be custom ordered on the screen.
- Attributes can be designated as required, meaning they are required to “submit for approval” but will not prevent records from being created. These are designated with an orange asterisk.
- Attributes can be driven by formulas, including lookups, text manipulation, numeric, and currency formulas and formulas that drive dependencies. These may be complex. Ask your CSM for details on the many possibilities here.
- Attributes are set up instance wide.
- Attributes can exist on every Plan object.

- Attributes can be text boxes, or Single-Select or Multi-Select dropdowns. Users can enter different allocations for expected performance and costs for each selected pick-list item on multi-

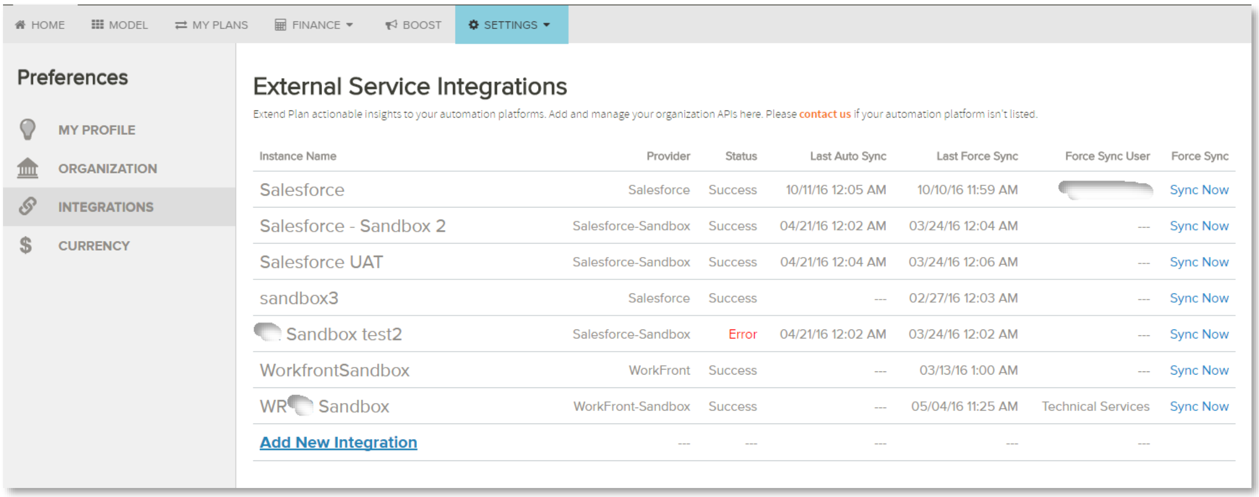
Multi-Select Attributes allow the user to assign the proportion of the Attribute's Cost and Performance (CVR) to be assigned between the selected values. In the example below, 50% of the Cost and 50% of the CVR are assigned to each of the two Countries selected. These values are automatically divided equally by Hive9, but may be manually edited, as long as the total % adds up to 100%. Cost and CVR may be assigned independently. For example, the US may be assigned 50% of the Tactic Cost but receive 75% of the CVR performance credit. The < *single-selection* link at the bottom of the window allows the user to revert to Single-Select mode. A choice will need to be made to determine which of the values is selected.

Name	CVR (%)	Cost (%)
☑ Canada	50%	50%
☐ Mexico		
☑ United States	50%	50%

  Select attributes.

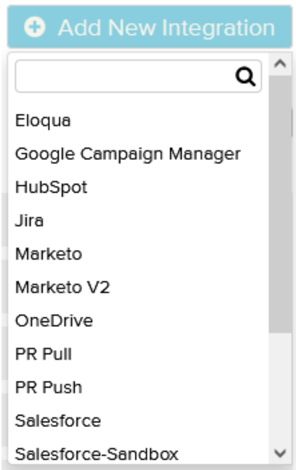
- Attributes can be mapped to integrated 3rd party systems.
- If you change a Tactic Type, Tactic Planned Cost and initial stage (typically Inquiry) will revert to the amounts listed in the Model.
- Talk to your CS team representatives to take advantage of these capabilities

10.6 Integrations

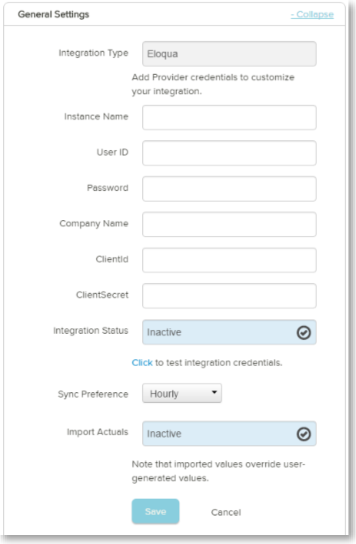


10.6.1Add Integration

- Click > Menu > Settings > Integrations.
- Click *Add Integration* in the upper-right corner.
- Choose platform:

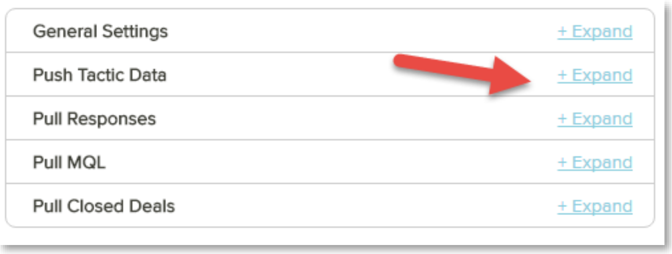


- Enter information. The required information depends on your chosen platform.



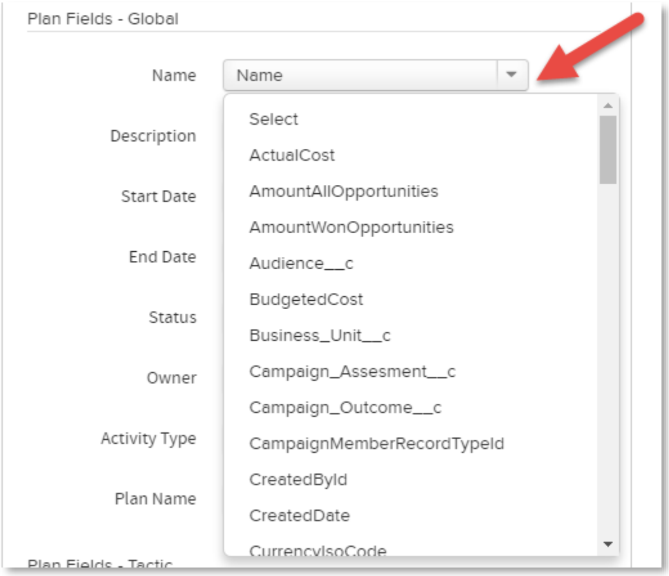
- Click test integration credentials and look for success message:

- Click *Save*.
- Expand Push and Pull sections to complete integration setup for each required area.



Note: Not all information needs to come from one system. One system may provide Responses and another MQL and Closed Deals.

- Use dropdown to expose field data from integrated system

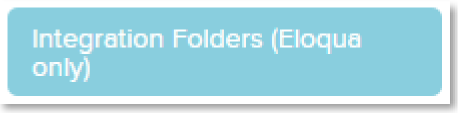


Note: Not every field needs to be integrated.

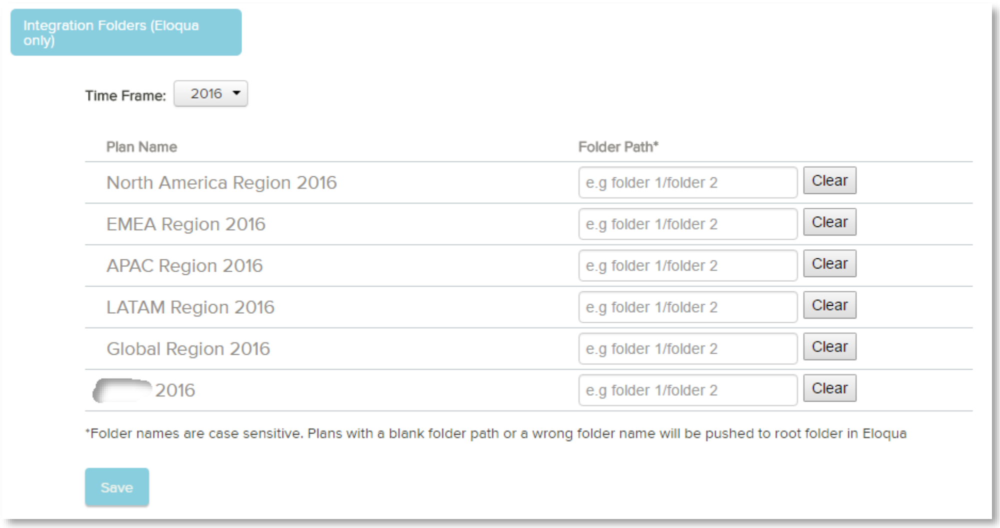
- Click *Save*.

10.6.2 Integration Folders – Eloqua and Marketo

If you Push tactics from Hive9 directly into Eloqua or Marketo, then you need to set up the destination folder.

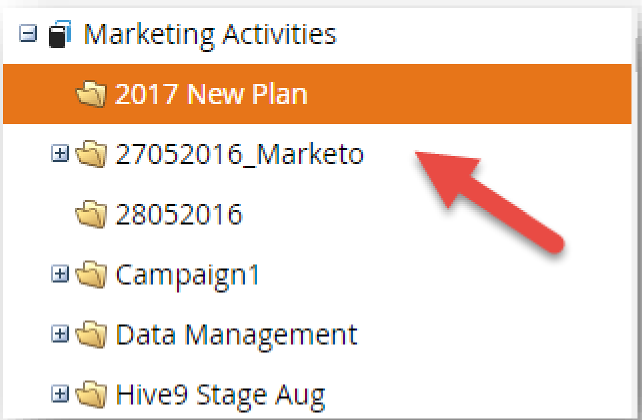


Destination folders are designated at the Plan level.



Eloqua Folder can be in hierarchy – Example – North America/Pending

Marketo Folder – Folder has to be in root Marketing Activities folder – Example 2017 New Plan



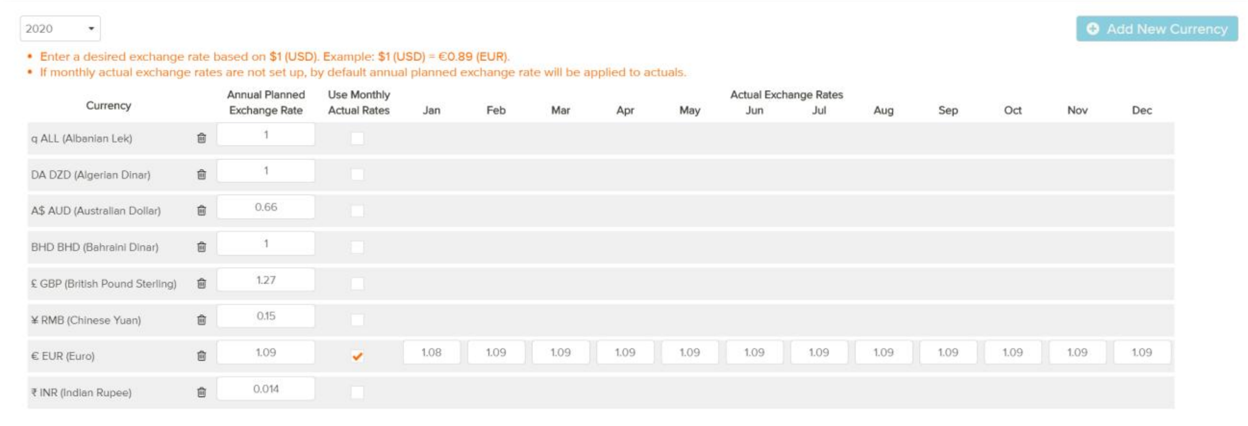
10.7 Working in Alternate Currencies

Hive9 supports multiple international currencies and can resolve transactions and budgets in foreign currencies back to US Dollars. Some key concepts about working in multiple currencies:

- You may select which currencies are valid for your instance from a currency table.
- Hive9 supports a universal conversion table that may be maintained only by users with permissions to edit that table.
- Every user can be assigned a default currency, so if a particular user works in Germany, for example, that user's default currency might be set to Euro.

Maintaining Exchange Rates

In the Currency Window, choose the currency that you wish to update and update the Exchange Rate field for that currency. You can also opt to use monthly rates for some or all currencies by clicking the checkbox and then updating the rates throughout the year.



2020

Add New Currency

- Enter a desired exchange rate based on $1 (USD). Example: $1 (USD) = €0.89 (EUR).
- If monthly actual exchange rates are not set up, by default annual planned exchange rate will be applied to actuals.

Currency	Annual Planned Exchange Rate	Use Monthly Actual Rates	Jan	Feb	Mar	Apr	May	Actual Exchange Rates Jun	Jul	Aug	Sep	Oct	Nov	Dec
q ALL (Albanian Lek)	1													
DA DZD (Algerian Dinar)	1													
A$ AUD (Australian Dollar)	0.66													
BHD BHD (Bahraini Dinar)	1													
£ GBP (British Pound Sterling)	1.27													
¥ RMB (Chinese Yuan)	0.15													
€ EUR (Euro)	1.09	✓	1.08	1.09	1.09	1.09	1.09	1.09	1.09	1.09	1.09	1.09	1.09	1.09
₹ INR (Indian Rupee)	0.014													

10.7.1 Add Currency

- Click > *Menu* > *Settings* > *Currency*.
- Click *Add New Currency* in the upper-right corner.
- Select a currency you want to add to your list of currencies.
- The currency is added to the Currency list.
- Set the Exchange Rate for the currency.

You have added a currency.

10.7.2 Delete Currency

- Click > *Menu* > *Settings* > *Currency*.
- Click Trash Can icon

A security prompt is displayed

- Click *Yes*.

The currency will be removed from the available currencies.

10.8 Organizational Setup

> Note
>
> This section is reserved for global instance settings.

10.8.1 Budget Configuration

You can turn off/on the ability to use Plan Budget in your instance.

10.8.2 User Category Attribute Options

The User Category feature allows classification of users and automatic inheritance of these categories across Hive9 entities. This enables attribute-based dependencies and filtering across your instance.

Managing User Categories

When enabled, administrators can manage User Categories under User Profile Configuration:

- Click *Add New Option* to create a new category.
- Use the *Edit* icon to modify existing categories.
- Use the *Delete* icon to remove categories.
- Click *Save* to confirm changes.

> Note
>
> User Categories automatically apply to all Plans, Campaigns, Programs, Tactics, and Line Items owned by users. This enables category-based dependencies and filtering across your instance. You can configure dependencies between User Categories and other custom attributes through your Hive9 Customer Success team. All changes to User Categories are tracked in the audit log.

To assign User Categories:

1. For your profile: Navigate to *My Account*
2. For other users: Navigate to *Users > [User Name]*
3. Select a category from the *User Category* dropdown and click *Save*.

10.8.3 Use Planned Cost as Actual Cost

If your organization does not have financial integration to pull in Actual Costs, you may elect to use Planned Cost in standard reporting to reflect calculations based on Actual Cost, such as ROI.

10.8.4 Custom Goals

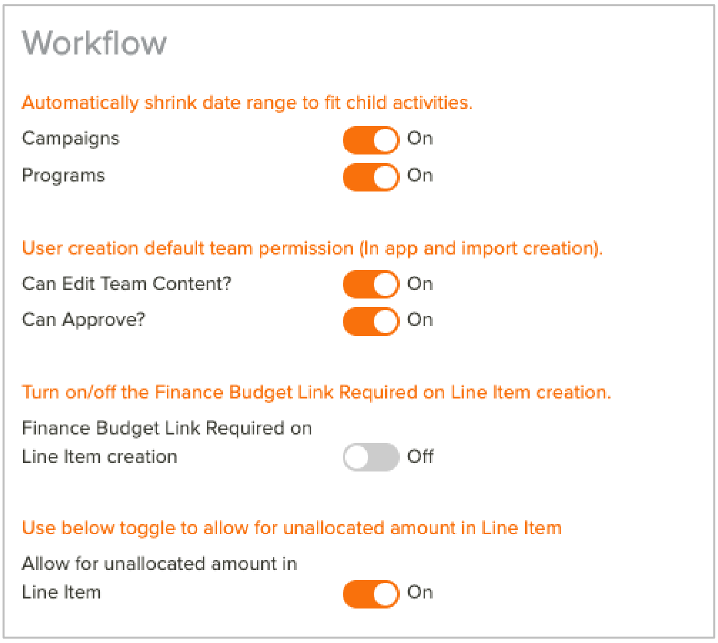
Custom Goals enable the user to create Goals for Plans and the Tactics that reside in those Plans. After a Custom Goal is created, it can be added to a Plan. If the Custom Goal resides on a Plan, it can be chosen on a Tactic within the Plan.

Use the Create Custom Goal button and complete the fields.

- Goal Code – A 4-character code that is used to identify the goal.
- Goal Type – This defines the type of entry. Percentage goals are not totaled or averaged.

10.8.5 Workflow

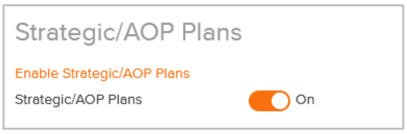
There are several workflow options available to users.



Option	Description
Automatically shrink date range to fit child activities	The option enables the Start and End Dates associated with Campaigns and/or Programs to shrink to fit to the Start and End Date associated with their child Tactics. If this is set to "on," the Campaigns and Programs dates will automatically expand to correspond to their associated child Tactics.
User creation default team permission (In app and import creation)	The option set enables the organization to set some defaults on user setup for making every user an eligible approver and authorizing them to edit their team's content.
Turn on/off the Finance Budget Link Required on Line Item creation	The option set determines whether you want to force the linking of tactic line items to the financial budget.
Use the toggle below to allow for unallocated amount in Line Item	The option determines whether users may leave unallocated amounts when creating Line Items using the Custom Allocation option.

10.8.6 AOP/Strategic Plans

In case your company wants to mark plans as AOP/Strategic Plan, turn the toggle on:



When the feature is turned on, the standard attribute *Set Plan as Strategic/AOP* is visible in the Inspection Window at plan level.

In addition, a user can filter the AOP/Strategic Plans in the filter panel on the left-hand side. Three new filters are added in the filters, under the *Plan View* section:

- All plans
- Strategic/AOP Plans Only
- Exclude Strategic/AOP Plans

10.8.7 Tactic Category Configuration

Default Tactic Category - This is used to define the default view used on the Summary, Revenue, and Waterfall reports.

Asset Caption and Promotion Caption – This allows you to change the label across the instance, where applicable.

10.8.8 Finance Budget Levels

You can create and name the levels of your finance budget as you would like them to appear in the dashboards.

10.8.9 System Admin Only Options

The Hive9 hierarchy uses a standard naming convention of Plan (highest level), Campaign, Program, and Tactic (lowest level). Line Items are a part of a Tactic allowing costs to be allocated to Budgets. In this section, Hive9 allows each organization to re-configure the naming convention to suit specific nomenclature. Your CS manager can assist with renaming these levels for you.

When enabled, the optional *User Category* attribute empowers you to efficiently categorize users and automatically assign these classifications to their content.

10.8.10 Application Timeout

The Application Timeout setting lets you control how long a user's session remains active during a given period of inactivity. After the specified time without activity, users are automatically logged out and must authenticate again to regain access.

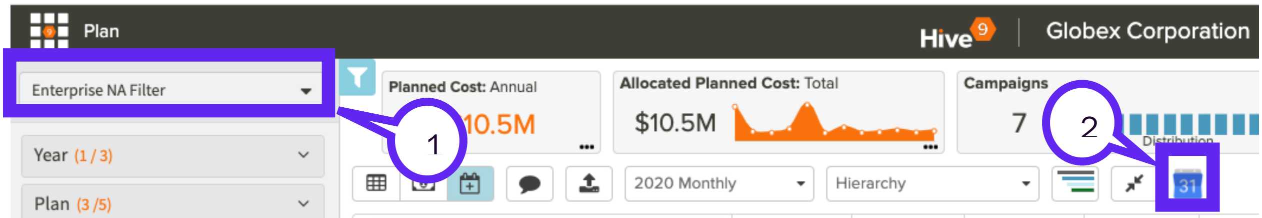
To set the Application Timeout:

- Navigate to the *App Configurations* section at the top of Organizational Setup
- Enter the desired timeout duration in minutes (10-120)
- Click *Save*

> Note
>
> Only whole numbers between 10 and 120 minutes are accepted.
>
> The default timeout is 60 minutes. Changes to timeout settings are recorded in the audit log.

10.8.11 Calendar Export Configuration

This option enables the Calendar View in your Plan Grid to be exported to an ICS file via a URL for import into calendar applications like Google and Outlook. This is accessible on the Plan grid only from saved Filters.



10.8.12 Purchase Request Configuration

If you have purchased the “Purchase Support Module,” your CS team will turn this feature on and work with you to determine if additional lines may be added to existing purchase requests.

10.8.13 Relate Plans Configuration

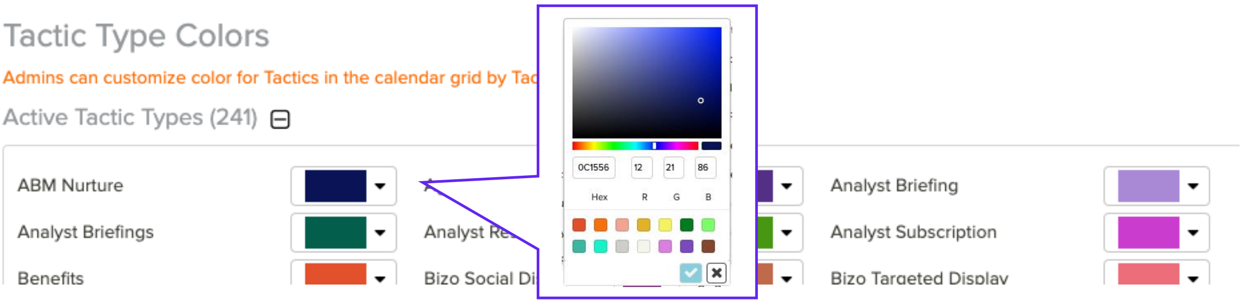
In oTo relationships between plans, turn the toggle on:

When the feature is turned on, a *Related Plans* grid is shown in a plan’s Inspection Window. This gives users the ability to relate plans as parent or child. Please note that the child entities of related plans will not be related to each other.

10.9 Theme

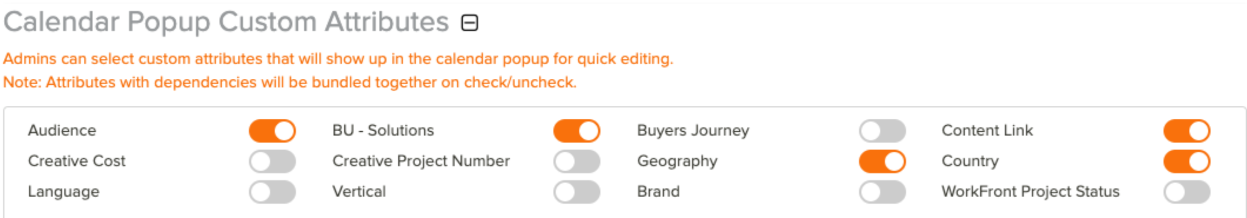
10.9.1 Tactic Type Colors

This option allows your calendar view to be color-coded by tactic type. Your administrators will be able to set these colors for display across the instance. The number of choices available depends on how many tactic types you have available in your instance. To edit a color, click the color box and an editing window will pop open. There are various pre-defined colors, plus the ability to define custom colors. When you are finished, be sure to click the checkbox in the lower right-hand corner of the popup window to save your color for that Tactic Type.



10.9.2 Calendar Popup Custom Attributes

This option allows you to determine which Custom Attributes appear in the popup Quick View window when you click on a Tactic in the calendar view. These are in addition to the five standard attributes that always appear: Name, Start Date, End Date, Planned Cost and Description. Simply click the attributes you want to appear. Hive9 recommends keeping this number to the minimum possible, since the ability to open the full Inspection Window is also available.



We recommend minimalism, since you can always open the full inspection window from the quick view popup.

10.10 Approval Workflow

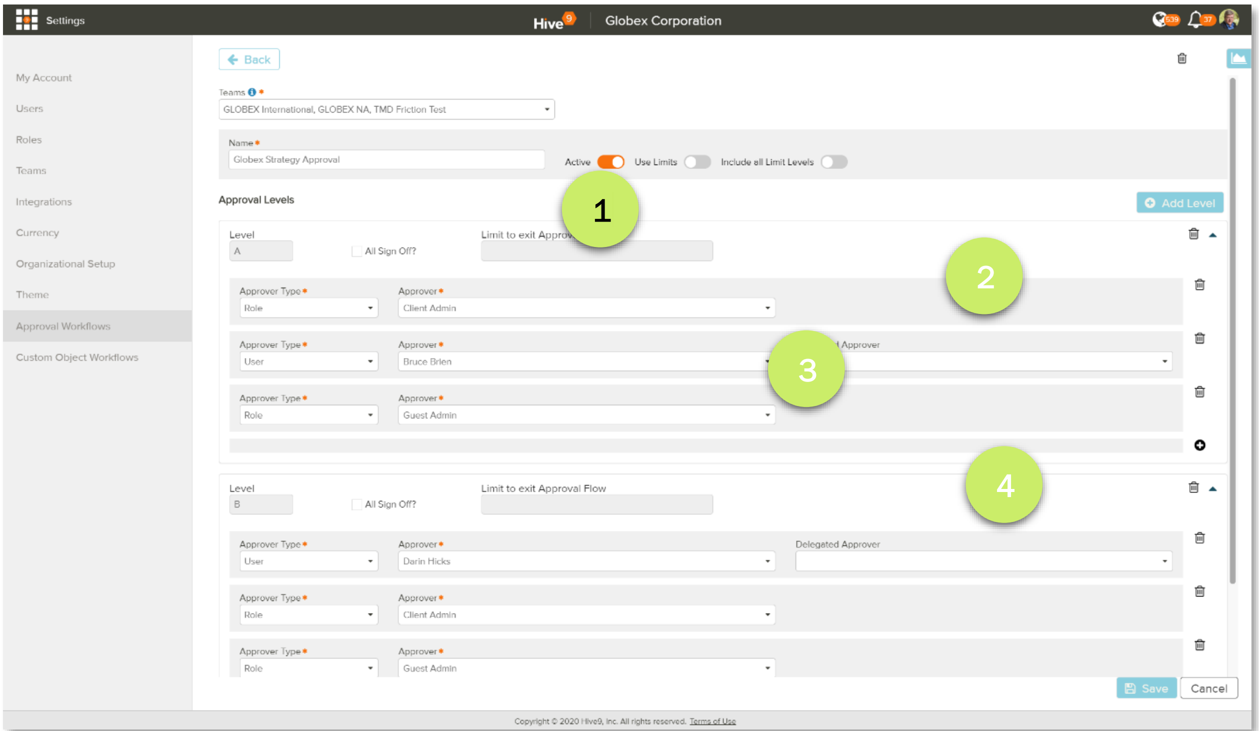
Attention!
Anything that has been submitted before turning on the Approval workflows should be either approved or declined back to Created status. Never convert with objects left in the Submitted state.
Do NOT turn on workflow for any object until all workflows are built and ready. Once created, you will need to go back into workflows and populate to which object it applies.

The approval system is designed to be flexible so that generic approvals can work across teams, ignoring roles or attributes that don't exist in some cases while still working when needed without having to change the workflow. For example, one might require the role of "gatekeeper" to sign off on PRs on any team that has a "gatekeeper". This requirement is ignored for PRs on teams with no one in that role.

Note

Once turned on for a plan object like tactics, they are on for everyone in your organization, so it is important set everything up first and communicate the cut-over.

Hive9 offers you two types of workflow:



Basic Approvals

Basic approvals are automatically available in the system for tactics and purchase requests. Any team member with them approve flag set to *Yes* can approve tactics or purchase requests on their team. When they enter records themselves, they see an “approve” button, instead of a “submit” button. All other users see a submit button.

Approval Workflows

Approval workflows are specific to teams, can call for serial or parallel signoffs, can require one or more signoffs, can incorporate limits, and can have multiple “relative” approver options to make the maintenance easy. Only users with permission can create these workflows to route specific plan objects through a more advanced approval. If activated by Uptempo these users can also create approval workflows for a custom attribute group.

In case several custom attribute groups are enabled for approval for an object, only one group is shown at a time; until and unless the approver doesn’t approve the first group, the next group won’t be visible. Once all the custom attribute groups are approved, then the user will be able to see the *Submit* button enabled at object level (in case object is subject to approval).

If custom attribute groups need to be approved, the status of an object depends on whether the object is also subject to approval.

- Only custom attribute group approvals: Until all custom attribute group approvals are completed, object status remains *Created*. Subsequently, the status is changed according to the hierarchy below.
- Custom attribute group and object approval: The status is created until the object is approved.

> Note
>
> For objects that are already approved when the *Custom Attribute Group Approvals* feature is activated, the following applies: If custom attribute group approvals become necessary with the activation, the entire approval process must be run through again. This means that all custom attribute groups must first be approved for these objects, and then the objects themselves must be approved.

10.10.1 Create Advanced Workflow

1. Click > *Menu* > *Settings* > *Approval Workflows*.
2. Click *Create New Approval Workflow*.

   The workflow settings dialog is displayed.

   a. Edit the mandatory fields:

   b. Select the teams that the workflow applies to.

   c. Select one of the following options

   d. Select objects (Tactic, Purchase Request, Modified PR Accrual Request) for which the workflow applies to.

   e. Select custom attribute group.

   f. Enter a name. Note: The name must be unique among workflows.

3. Decide on the Active status: Only turn it on when you are ready to use it.

   a. In case you selected an object: Decide whether to use monetary limits. If *Use Limits* are turned on, the workflow will stop once a level is reached that is higher than the amount on the object being approved.

   b. If you are using limits, decide whether the lower limit levels need to sign off or if the approval should jump right to the limit that would allow an exit. If the Include all Limit Levels switch is turned on, then the lower limit levels need to sign off.

   c. If you are using limits, select the *Limit Currency*.

4. Enter the Level rules:

   a. Indicate whether everyone at this level has to sign off, or if a single signoff moves the approval to the next level. If everyone at this level has to sign off, then activate the *All Sign-Off?* checkbox.

   TIP: If 2 out of 4 people need to sign off, split it into 2 levels.

   b. If you are using limits, enter the limit to allow an exit from the approval. Limits must be greater than zero, and each level's limit must be higher than the previous level. Note: Be sure to enter a very high limit for the last level.

5. Enter the approvers. Approvers can be entered as one of 4 different types:

    - *User* – This refers to a specific individual user in Hive9. The individual must be a registered Hive9 user. Simply select a specific user from the drop-down. Only "approver" eligible members of the associated teams will show up. The user may assign a delegate, who also needs to be enabled to approve. Users may assign delegates for each of the Workflows for which they are an approver. It is designed to turn on like an "OOO" in Outlook.

> Note: If a workflow is set up for multiple teams, when that workflow is applied to an object that an approver does not have access to, they will be omitted from the approval automatically. If the omission results in that level not having any approvers, it will be skipped.
> You may also select a delegated approver if the approver is sometimes unavailable. Approvers can turn their delegates on or off in their user settings, much like an Out-of-Office setting in your e-mail system.

   - *Role* – Select a role as an approver. Any team member with the selected role that also has access to the object in question will be listed as an approver on the approval tracker. Individuals in that Role must be on the same Team to which the Workflow is restricted, and Approvals must be turned on for that Team. The individuals in that Role for that Team must also have Approval authority within the Team setup page.

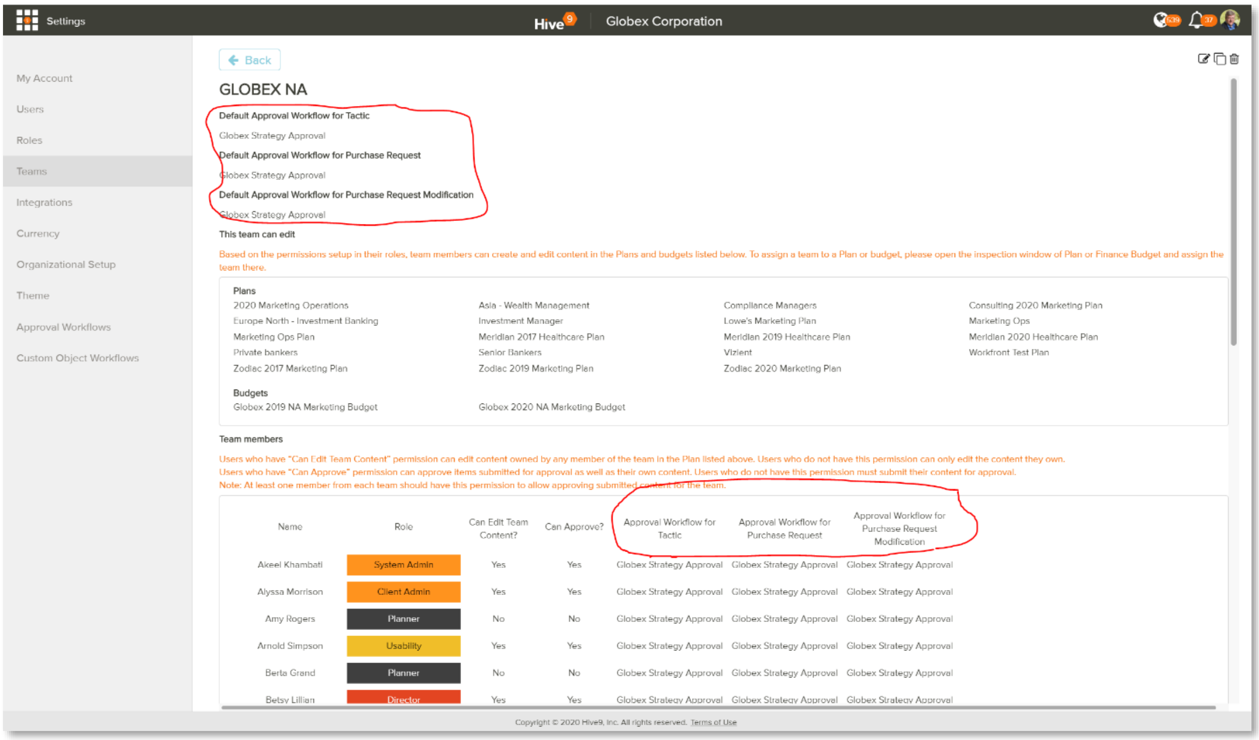
   - *Record Owner* – You may select record owners as approvers. This refers to the record related to the record being approved. Once they are selected, you must also select which record level you are referring to, such as Program, Campaign, etc. This would be a setting saying the record's owner can approve it. If the approver can "see" the record, they can approve it. This method may be used as a "self-approval" method, by allowing the owner of the record itself to approve it. Example: to create a "self-approval" for Purchase requisitions, choose record owner and choose "purchase requisition." When a user creates a purchase requisition, they are the owner, so they will also be the approver.

- *Custom Attribute* – To use this option, you must first work with your Hive9 CS team to ensure that you have a custom attribute that refers to real user records. They will help you set that up. The attribute must contain a unique value, such as an email address. Once set up, these attributes will appear in the list. Once selected, the workflow will find the related object (or objects) where the attribute resides, read the entry, and make that user an approver (if "approver" and "team" and "object" eligible).
  - In case you want a parallel sign-off, click the Plus icon to add approvers. Then repeat step 5.
  - In case you want serial levels, click *Add Level*. Levels are automatically generated using an A-Z naming convention. Repeat steps 4and 5.
  - Click *Save*.

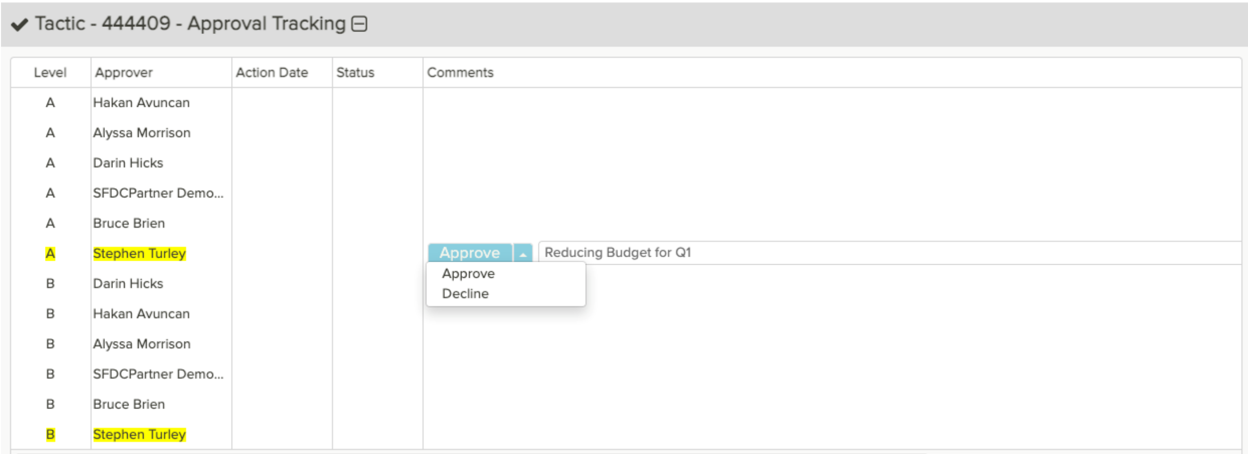
You have created the workflow.

Once you have saved the workflow, you can check its structure by clicking the icon in the upper-right corner. Then an overview chart is displayed.

Once created, different workflows can be set as the default workflow on each team for each workflow eligible object. That default cascades to the team members, where it can be overridden. The defaults show up on the plan and purchase support objects when created.



An alert will be sent to the Client Admin when there is an issue with an Approval.
Anything you are eligible to approve will is highlighted in yellow.

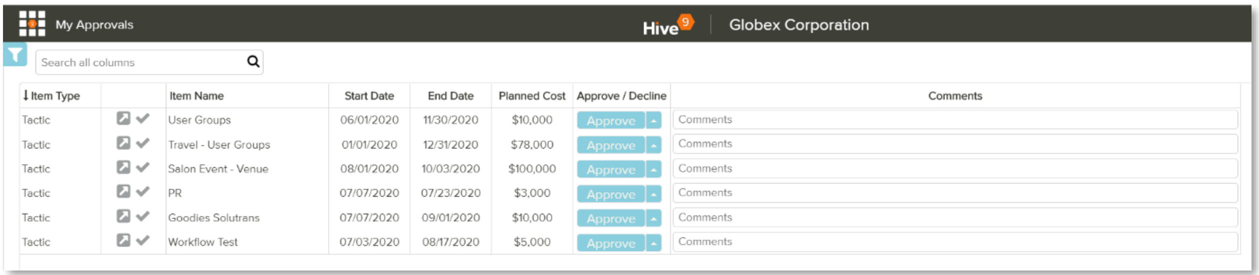


You MUST add a comment when declining an approval request, but comments are optional when approving.

Once the instance has changed to Approval Workflows, retroactive edits to earlier year plans will force approval through the CURRENT Workflow.

If the workflow on an object is changed before the object reaching an Approved status, that object will be redirected to the new Approval steps.

10.10.2 My Approvals Grid



When you have approvals, which you can set up notifications for, select the “approvals” icon under settings in the main navigation, and the grid above will be shown.

Users can see what type of approval they have, the name of the item, the associated dates, and the amount to be approved.

Clicking the boxed arrow will navigate directly to the item in question if a detailed review is needed.

Clicking the checkmark will display a pop-up of the current approval history and comments so that the approver has context if they are deeper in the workflow.

Finally, the user can approve or decline the request right from this screen. Comments are required for “decline” and optional for “approve.”

Approvals can also be made from the objects needing approval directly.

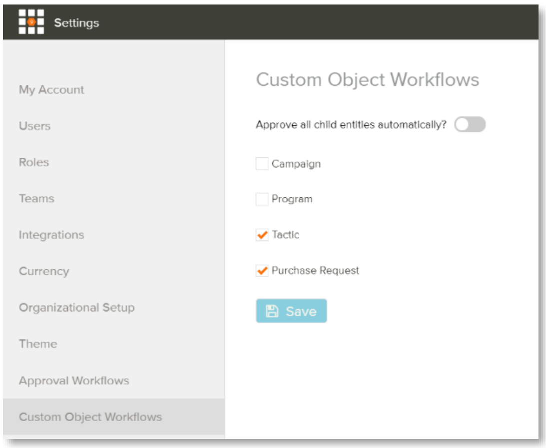
10.10.3 Approvals Dashboard

See chapter 7.4 in Reports

10.10.4 Custom Object Workflows

Your organization can choose to use the traditional approval system where any “approver” on a team can approve any tactic or purchase request that needs approval from the tactic or purchase request itself by simply not turning on workflow approvals on any object.

If you would like to use the more advanced approval workflows, once you have them set up and “active,” you need to turn them on for the objects where you want to use them:



You can also decide if you want to “auto-approve” all the child records when a parent is approved. Using approvals at the campaign or program level has no real impact apart from recording the approval tracker signoffs unless the “include children” flag is set, at which point, they have the significant impact of approving all the submitted child records.

> **Note**
>
> When using approval workflows for tactics, Tactic Types can be designated as requiring approval so that organizations can create tactic types that may or may not require any approval if needed. This designation is made in model set-up. See chapter 10.12.1.1 (Model Screens).

10.10.5 Managing Workflow Lifecycle

Managing the lifecycle of approval workflows means understanding when and how to deactivate or delete them. This section explains the system's protections and guides you through proper workflow transitions.

Workflow States and Restrictions

- Active Workflows with In-Progress Approvals:
    - When tactics are actively moving through a workflow's approval stages, Hive9 prevents you from deactivating or deleting that workflow. If you attempt either action, the system blocks it and displays an error message. This protection ensures tactics under review can complete their approval journey without interruption.
- Active Workflows without In-Progress Approvals:
    - You can deactivate or delete workflows that aren't currently processing approvals. However, tactics previously assigned to these workflows retain their assignment, creating a situation that requires your attention before those tactics can be edited or approved again.

Working with Inactive or Deleted Workflows

- Viewing Affected Tactics:
    - Tactics linked to inactive or deleted workflows continue displaying their workflow assignment in the inspection window. This visibility helps you identify which tactics need updating.
- Editing Restrictions:
    - When you edit a tactic with an inactive or deleted workflow, you can make changes but cannot save until you address the workflow issue. The system displays the following validation message:

      "Selected approval workflow is marked as inactive or deleted and should be changed."

  To proceed, you must select an active workflow from the dropdown before saving your changes.

Approval Restrictions

The system prevents further approvals of tactics linked to inactive or deleted workflows. Across all approval interfaces, you'll find:

- The Approve button is hidden
- The following notification message appears: "The Approval workflow associated with this tactic is marked as inactive or deleted, hence the tactic cannot be approved further."
- This restriction applies in:
    - Tactic Inspection Windows
    - Approval Tracking Grid
    - My Approvals page
    - Bulk Actions

Managing Workflow Transitions

Before you deactivate a workflow review all tactics using the workflow by filtering your plan grid by workflow assignment. This preparation helps you understand the scope of impact and plan your transition approach.

Recommended Transition Process

Follow these steps for smooth transitions:

1. Create and test your new workflow.
2. Allow in-progress approvals to be completed.
3. Deactivate the old workflow during low-activity periods.
4. Update affected tactics to use the new workflow.
5. Communicate changes to your team, especially approvers.

Handling Urgent Changes

If you must modify a workflow with active approvals, either wait for current approvals to be completed or work with approvers to expedite them through the system.

Common Scenarios and Solutions

- **Discovering tactics with deleted workflows:** Open each affected tactic's inspection window, select a new active workflow, and save. For multiple tactics, process them systematically as bulk workflow changes aren't available.
- **Historical reporting needs:** Workflow history remains in audit logs even after deletion, preserving your approval history for reporting purposes.
- **Team communication:** Inform users about workflow changes in advance, specifying which workflows are changing, when changes occur, and what actions they need to take.

System Safeguards

Hive9 implements these protections to maintain workflow integrity:

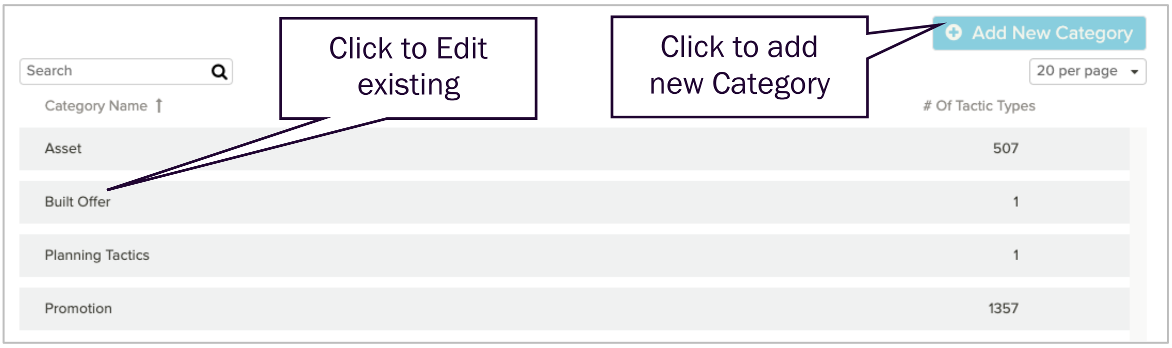
- **Deletion Prevention:** Blocks deletion of workflows with active approvals
- **Edit Validation:** Requires active workflow selection before saving tactics
- **Approval Blocking:** Hides approval actions for invalid workflows
- **Clear Messaging:** Provides consistent guidance across all interfaces

These validations protect your approval processes while allowing controlled evolution of your workflows as business needs change.

10.11 Tactic Type Categories

Tactic Type Categories setup allows Admins to configure the allowable Tactic Type Categories available to Models within the instance. Every instance is initially configured with two “standard” Tactic Types: *Asset* and *Promotion*.

These may be edited within the Tactic Type Categories editor. Existing Tactic Type Categories are displayed, showing the total number of Model Tactic Types that use the Category’s definition. From this screen, the user may also add a new Tactic Category.



To edit an existing category, click on the Category Name, then click the Edit icon in the upper-right corner. From this screen, the user may also Copy or Delete this Category.

10.12 Models

10.12.1 Create Model

- Click > Menu > Model.
- Click *New Model*.

> Note: Duplication of a model will copy all tactics and settings from the duplicated model. We find this typically works in the favor of the model creator. Further, duplicated models are found on the *All* tab and not the *Active* tab (which is the default).

Die Edit dialog for the model is opened on *Model Overview* tab.

- Enter the name in the *I'm creating a model called...* field.
- Enter the Average Deal Size (ADS) for the model.
- Enter Conversion Rates:

a. Enter in the corresponding percentages between stages.
b. For the Velocity column, enter the average calendar days between stages.
c. In the Allowed as Target Stage, choose either True or False, depending on whether tactics will be deployed that will target the specific stage.

- Set up general configurations:

a. You can set planned costs on tactics to be required so that if they are changed, a re-approval can be launched
b. You can prevent tactics from "auto-balancing" by prohibiting a negative "Sys_Gen_Balance." This will ensure that the sum of the line items cannot exceed the planned cost of the tactic.

- Click the "Save Current Version & Continue" button
- Tactic Library – Current lists of tactics
  - Target Stage – Waterfall conversion calculations will begin after this stage.
  - Projected Responses – Typical responses generated by this tactic.
  - Projected Cost – Typical cost of this tactic.

- Deploy to Model – Deploy this tactic.
- Deploy to Integration – Default integration status.

Note: A tactic can be integrated with this unchecked.

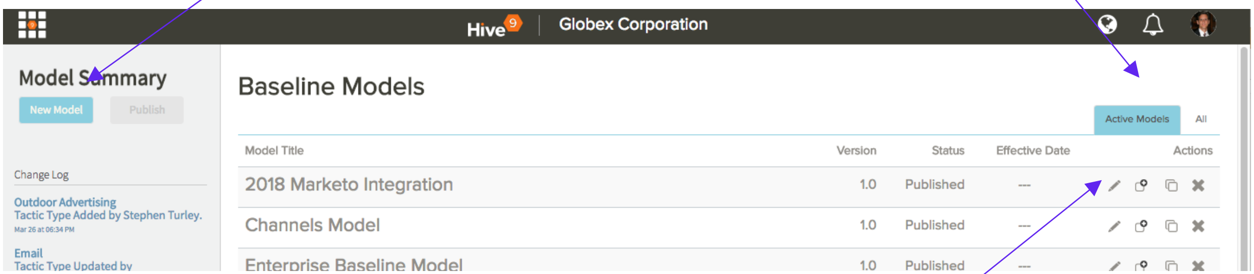
  - Click the “Save & Continue” button
  - Click the “Publish” button and choose a date.

10.12.1.1 Model Screens

Model Select Screen:

Tabs for Active and All
(inactive or draft) models

Create a new Model

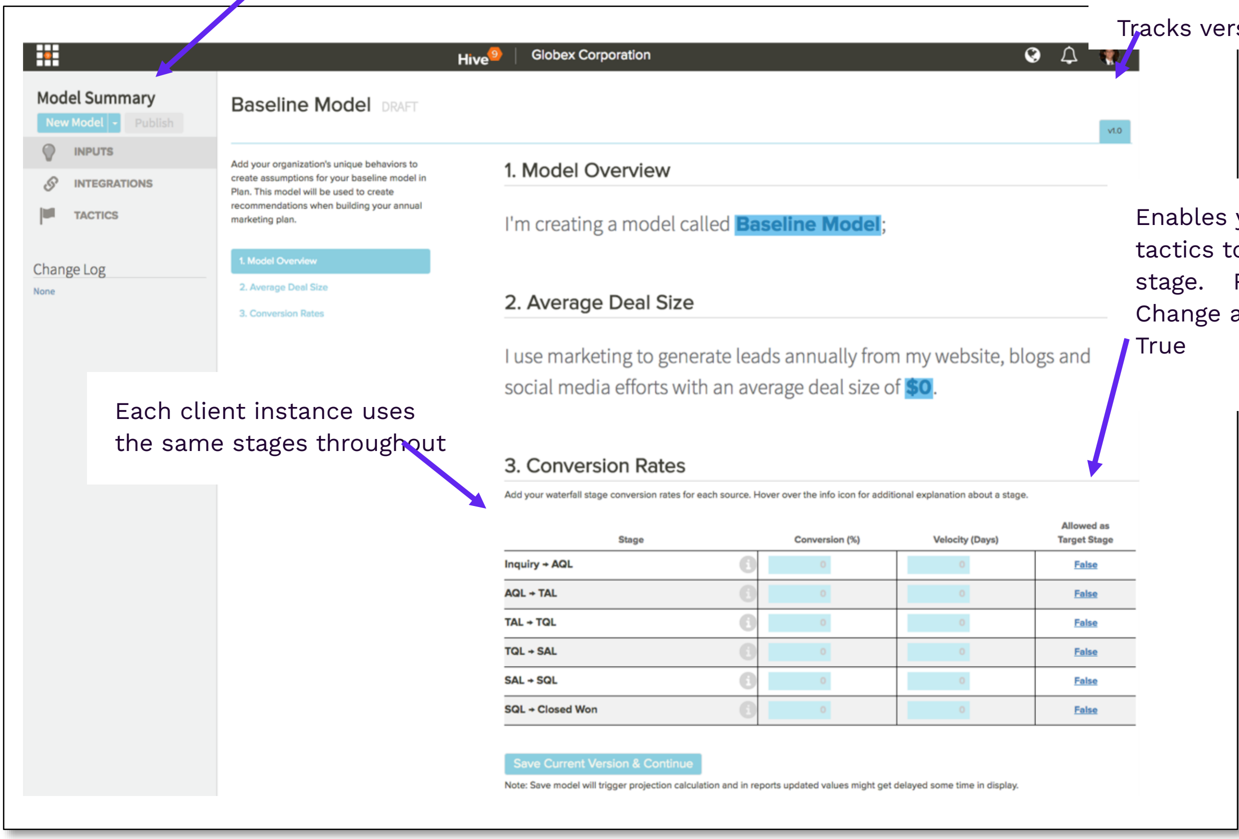


Edit, New, Copy and Delete

Model – Create Screen:

Allows you to Publish model when completed

Tracks version of Model

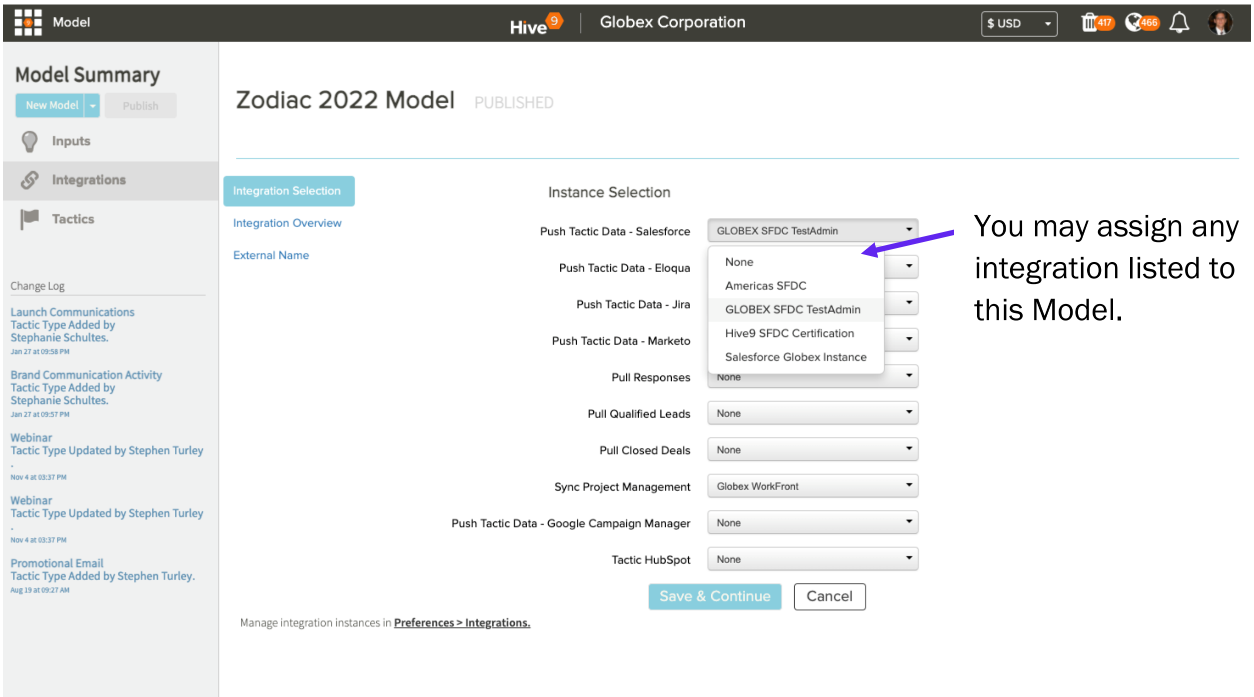


Enables you to restrict tactics to a specific stage. Recommend – Change all stages to True

Each client instance uses the same stages throughout

10.12.1.2 Model – Integrations

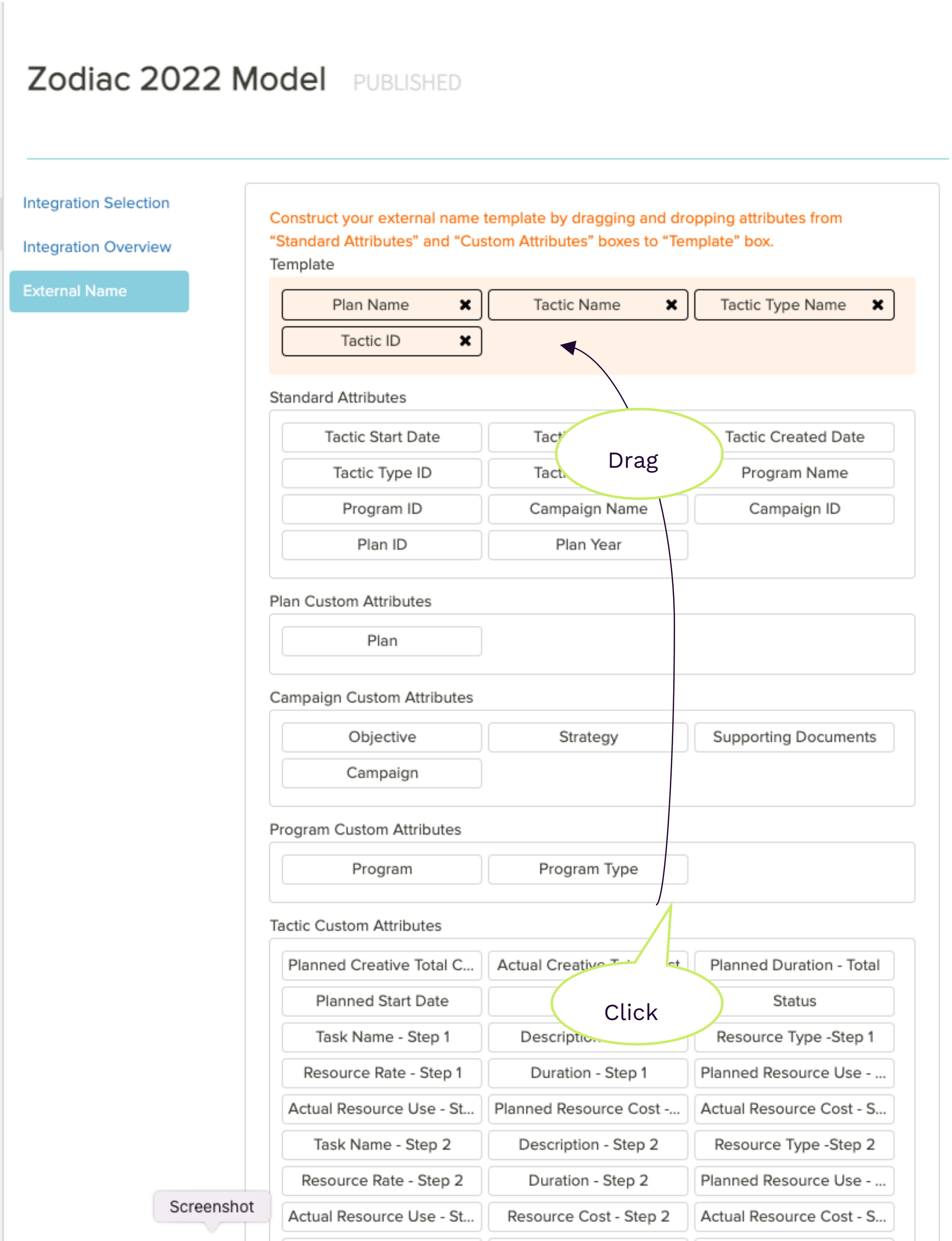
You may assign any available and configured integration to your Model. However, only one integration per type may be assigned. For example, if you have configured more than one Salesforce integration in your instance, only one of those may be assigned to a particular Model.



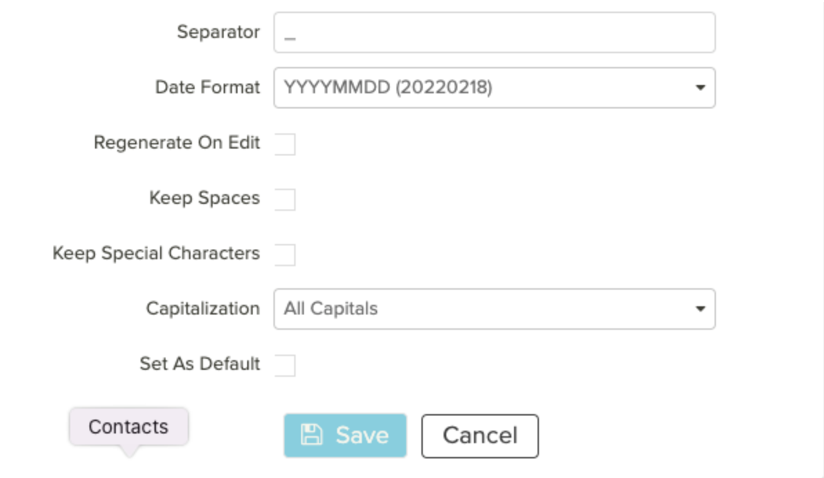
Once added to the Model, you will also need to enable each integration for each Tactic Type – this is explained in the next section.

10.12.1.3 External Name

Hive9 allows you to create a custom External Name that may be used instead of the Tactic Name in your integrations. This allows you to build a naming convention that conforms to your external, integrated platform. This real-time tool is a WYSIWYG drag-n-drop editor, allowing you to pull any standard or custom attribute into the naming convention in any order. Simply click on the attribute below and drag it into the pink Template to build your name.



Once you have assembled the list of attributes, you can use the tool to format the name using the configuration editor at the bottom of the screen. You can customize the separator, set date formats, choose whether to keep or remove spaces, and more.



Once you have configured the format of the External Name, click Save to begin generating External Names on Tactics. The External Name appears when the Tactic is Approved. If *Regenerate On Edit* is selected, for Tactics that are already approved, the name will update to reflect any edits upon saving the Tactic.

Note

If you change the *External Name* rules and have *Regenerate On Edit* selected, the new rules will apply to any approved tactic you edit afterward.

10.12.1.4 Tactic Library

Available Tactics that can be deployed:

Tactic Lists are specific to a model