BrandMaker

Release Notes

Version 8.0, October 2024

EN

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Uptempo GmbH

An der Raumfabrik, Amalienbadstraße 41a

76227 Karlsruhe, Germany
+49 721 97791-000

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Content

Release 8.0

Our Work Management 8.0 release in October 2024 is for all customers upgrading from BrandMaker 7.4 and earlier. We introduce the following features:

Global Functions

- **New Login Page:** We've introduced an updated authentication page to provide a streamlined way for accessing the platform.

  Learn more

- **New Navigation:** The new navigation features a collapsible sidebar with icons. Expand it to view page names and submenus. The header provides access to user profile options and customizable help resources.

  Learn more

- **Database Upgraded:** MySQL 8.0 now powers all our Work Management modules. This delivers enhanced performance, improved query optimization, stronger security and advanced JSON support.

  Learn more

- **Performance Improvements for Custom Structures & Custom Objects:** We have implemented various technical optimizations to improve the performance of Custom Structures and Custom Objects (CS/CO). As a result, you can now expect to see shorter load times for CS/CO data, as well as a generally smoother and more responsive user experience whenever you're working with CS/CO data. This update is also available for 7.4 customers.
- **Global Discontinuations:** Some features were part of our product offering up to Version 7.4. As we've evolved our platform, we have replaced some of these features with improved capabilities while others have been phased out.

  Learn more

Administration

- **User Management:** Discover our revamped user management system. Administrators gain a unified interface for streamlined control, while users enjoy enhanced self-service options.

  Learn more

- **Single Sign-On (SSO) Integration:** Experience simplified, secure access with our new SSO integration. Users enjoy a streamlined login process while administrators benefit from enhanced security and centralized authentication management.

  Learn more

- **Automated User Creation via SAML for SSO Integration:** Automated user creation via SAML enhances our SSO integration. This limited beta release streamlines onboarding by syncing accounts between platforms and applying permission templates automatically. Early Access

  Learn more

- **Log In As Feature:** Verified users possessing *Manage User* permissions can temporarily experience the platform through another user's perspective by accessing their view and functionality. The impersonation feature is available for Early Access. It facilitates streamlined support while maintaining security through controlled access. Early Access

  Learn more

- **User Type Field in Admin User Profile:** The restored *Type* attribute field in administrator profiles enhances Single Sign-On flexibility while enabling manual account management and specialized handling requirements. Direct integration with backend structures ensures seamless support for various authentication workflows. Early Access

  Learn more

- **Logout Redirect:** Many organizations require routing users to specific locations post-logout for continuity or security purposes. Administrators can now set a custom destination for users after logging out. Previously, all users were directed to the login page by default.

  Learn more

- **Teams Dropdown Now Alphabetically:** Improved team assignment functionality in the user account, *Membership* modal. Teams now appear alphabetically, streamlining selection for administrators managing numerous groups.

  Learn more

- **Discontinuations Administration and Attributes:** Discontinued features and legacy BrandMaker modules.

  Learn more

Job Manager

- **Dynamic Group Assignment in Workflows:** User tasks in BPMN workflows now allow groups to be assigned and modified throughout process execution via the dedicated *User Group* variable field. Group members access assignments via picklist filter, enabling collaborative work management with configurable defaults and mandatory routing options.

  Learn more

- **Former Assignees Automatically Added as Participants:** Former task assignees automatically retain visibility and access to jobs they previously managed through seamless participant status addition. The enhancement ensures continuous workflow tracking while maintaining appropriate security controls across all process types, eliminating confusing error messages when attempting to revisit past assignments.

  Learn more

- **Navigating Between Activities and Jobs:** We introduce seamless navigation between Activities and Jobs modules while maintaining synchronized data across linked items. Users can now effortlessly switch contexts, modify relevant fields, and maintain data consistency through intuitive two-way synchronization features.

  Learn more

- **Visibility and Permissions Settings:** Data sheets now have consolidated visibility controls with previews and permission distinctions, managed through a central panel. Default tabs are marked by house icons while visibility options are set via eye icons, with real-time preview capabilities.

  Learn more

- **Set Job Tabs to Be Visible to Creators Only:** When configuring job types, you can now use the new *CREATOR_ONLY* setting to control the visibility of any tab so that it can only be seen by job creators, and is hidden from job assignees.

  Learn more

- **Context Menu for Quick Access:** Save time managing jobs with a simple right-click to edit, cancel, delete or export directly from the job overview page. Open and compare multiple jobs in separate browser tabs while keeping your search filters and results exactly where you left them.

  Learn more

- **Flexible Creation of Sub-Jobs in BPMN Workflows:** We've improved the process for creating sub-jobs to make it more convenient and intuitive. You can now create sub-jobs with a single click from a job's Details view, enabling you to quickly create multiple sub-jobs without having to re-open the Details view each time. We have also added options to the job type configuration to allow sub-job creation for BPMN workflows, similar to how it works for classic job types.

  Learn more

- **Deeplink Access to Jobs:** The new functionality allows for easier sharing of job links with team members. We have also improved navigation efficiency, making it easier to work with multiple jobs across browser tabs. Links now appear in the address bar and are no longer hidden under a menu item.

  Learn more

- **Substring Search:** Select variables in job datasheets gain powerful substring matching, enabling users to search any part of display names rather than just the beginning. This enhancement simplifies option discovery within single and multi-select fields, including advanced grid implementations, by displaying matches containing search terms regardless of their position.

  Learn more

- **Type Configuration UX Improvements:** A redesigned *Properties* interface streamlines job type configuration through logically grouped settings, enhanced layouts, and clearer labels across *General Settings*, *Appearance*, *Access* control, and *Synchronization* sections. You can efficiently manage display name, technical name, descriptions, categories, JS injection, plus sub-job behaviors while publishing changes or viewing logs on the same page.

  Learn more

- **Individual Column Width within Comfort Grid**: *Comfort Grid* variables can now be customized through six predefined size options, ranging from 50px to 600px, enabling optimal data displays. Administrators can configure these dimensions in the datasheet layout, which remain consistent as users interact with layouts.

  Learn more

- **Picklist:** Job Manager introduces a default *Picklist* filter that automatically displays tasks assigned to each user or their group for processing. This streamlined approach eliminates manual filter creation, saving valuable time while providing administrators and team members a simpler overview of selectable assignments. Also available for 7.4.

- **Improved Display of Status:** Job *Details* now displays *Changes requested* instead of *Approved with changes* when decision preferences are enabled, creating clearer status communication. This terminology alignment between Job Manager and Review Manager modules helps users better understand when modifications are needed.
- **Job Manager Performance Improvements:** We have completely overhauled Job Manager to improve its performance and reliability. The system now effortlessly processes millions of jobs while guaranteeing stable, uninterrupted operations. This is also available for 7.4 customers.
- **WYSIWYG Text Editor Update:** This update adds new features to the rich text editor. You can now format text fields and job discussions more easily with new tools.

  Learn more
- **Move Workflow Instance Forward Via API:** Previous workflow transition functionality `v1/job-or-process` in the API is deprecated and has been upgraded to a new V2 version. The new endpoint is designed to provide a better way to programmatically advance workflow steps by offering greater reliability, better error handling, and improved response times. All workflow transitions now use the new versioned endpoint. Click to Discover Job Manager API.
- **Manage Job Participants Via API:** External API endpoints now enable automated participant management, empowering developers to programmatically control job access and collaboration. The feature introduces comprehensive REST operations for listing, adding, updating, and removing participants, streamlining workflow administration.

  Learn more
- **JavaScript Extension Management:** Empowering administrators with enhanced JavaScript control, you can now inject custom code through both data sheet-specific and global implementations, offering improved stability and simplified maintenance.

  Learn more
- **Substring Search in Select Variables:** Introducing substring search in select variables: Quickly find options by typing any part of a name for faster, flexible selection.

  Learn more
- **Improved Data Sheet Input Field Visibility:** Streamlined navigation and enhanced visibility define our latest data sheet interface, where refined field styling, prominent borders, and improved contrast ratios work together to reduce eye strain while accelerating form completion.

- **Terminology Alignment:** The system standardizes terminology by replacing the term *iteration* with *version* across all areas, aligning job revisions with Review Manager's established naming convention. This unified language ensures consistency and prevents potential misunderstandings for users navigating different modules.
- **Job Manager Discontinuations:** Major module updates include streamlined permissions consolidated into *Manage Jobs* and *Manage Products*, while removing legacy features like Task Manager, Resources sub-module, SOAP interface and custom Rich Text Editor configurations.

  Learn more

Marketing Planner

- **New Sorting and Filtering:** The filter functionality now combines fast search with flexible ways to organize data to support both casual and power users demanding advanced multi-criteria sort and filter with Boolean operators. The modern interface offers expanded matching options and handles existing filter settings automatically.

  Learn more

- **Budget Rollover Calculation:** Budget rollover calculations now offer flexibility to include or exclude subelement budgets, allowing organizations to choose between rolling over parent-level budgets alone or the combined total across all nested activities. Using a simple selection in *Settings*, this enhancement applies to all future rollovers while preserving existing calculations.

  Learn more

- **Parallel Export in Marketing Planner:** Export operations of the entire tree structure now run in parallel, allowing you to continue working while large tree structures are being processed in the background. Simply select your export settings, provide details, close the panel and carry on with your tasks while the system handles the heavy lifting.

  Learn more

- **Custom Menu Read Permissions:** Menu extensions are now accessible to users with read permissions, expanding functionality while maintaining robust security through granular permission checks. Administrators retain control through custom configurations, enabling them to restrict specific menu items to write-permission users if needed.

  Learn more

- **Custom Menu User Cookie:** A new cookie-based menu system personalizes options according to your role and organizational status. This ensures a streamlined interface by displaying only the authorized features keeping your workspace relevant and distraction-free. The secure authentication process happens automatically at menu access.

  Learn more

- **Copy & Paste Element Sequence:** Copy and paste operations of a multi-selection now preserve the original sequence and structure of your elements. This fix ensures hierarchies remain intact and eliminates the need for manual reordering.

  Learn more

- **Bulk Data Processing APIs:** New APIs supercharge bulk operations with powerful batch processing and deep data retrieval capabilities, enabling efficient handling of large data sets and hierarchical structures. The expanded functionality includes selective dimension updates, customizable copying rules, and comprehensive task management across multiple levels.

  Learn more

Media Pool (DAM)

- **Import Feature Overhaul:** We introduce a comprehensive overhaul of the import functionality, delivering enhanced flexibility and control.

  Learn more

- **Asset Editing Limit Removed:** The 200-asset editing limit per session has been removed. You can now edit an unlimited number of assets simultaneously, though larger batches may require additional processing time.

  Learn more

- **Better Upload Performance for Large Video Files:** Media Pool now handles gigabyte-sized video files with enhanced efficiency through optimized virus scanning protocols and refined upload mechanisms. The UI provides clear feedback during transfers, and processing times are significantly faster.

  Learn more

- **User Based Edit Template:** User role-based asset type management enables centralized control over attribute visibility and editability through user roles instead of per-asset settings. This simplifies permission administration while providing more granular control over what users can view and modify in your asset management system.

Learn more

Switch to CLDR Language Codes: The Media Pool 8.0 uses CLDR (Common Locale Data Repository) language codes instead of 2-letter language codes, implementing modern Unicode standards for improved multilingual support. During the upgrade, existing 2-letter codes are automatically mapped to their CLDR equivalents.

Learn more

Miscellaneous Changes: Version 8.0 improves asset handling with clearer removal warnings and introduces better display of complex search queries in search fields. This release also completes the transition to REST API by retiring SOAP support.

Learn more

Home (Dashboard)

- **Review Manager Widget:** Reviews are now managed via flexible Home widgets.

  Learn more

- **Reworked Grid Behavior:** Grid behavior for widgets has been refined. Dragging now features delayed movement, smoother transitions, automatic vertical alignment, and position previews, enhancing overall layout control and customization ease.

  Learn more

- **Fusion UX Logic Widget:** Introducing the *Fusion UX Logic* widget for advanced application management. The new widget enables users with proper permissions to directly edit and customize Fusion UX components from their dashboard, enhancing control and efficiency.

  Learn more

Review Manager

- **Flexible Home Widgets Replace Start Page:** A major overhaul of the interface, replacing the old static overview page with a new, customizable *Home* module featuring flexible widgets. Key enhancements include customizable widgets tailored for different user roles.

  Learn more

- **Owner-Centric Interface Updates:** We introduced significant updates to the interface, focusing on improving clarity of roles, responsibilities, and review status. Key enhancements include an owner-focused header.

  Learn more

- **Invite Multiple Users to a Review in One Step:** This release introduces a long awaited enhancement, allowing owners to invite multiple contributors to a review simultaneously. This feature simplifies the review setup process.

  Learn more

- **Enhanced File Attachment Capabilities:** We significantly expanded file attachment options in Review Manager, streamlining information exchange and improving review efficiency.

  Learn more

- **Enhanced @Mention and Direct Comment Access:** This version improves the @mention feature in Review Manager, enhancing collaboration and efficiency. Quickly understand why you've been mentioned in the notification email without opening the review, new *Show Annotation* button for immediate access.

  Learn more

  Full-Screen Mode: Version 8.0 introduces Full-Screen Mode in Review Manager, enhancing focus and maximizing screen space during review processes.

  Learn more

- **New Design of Review Status Bar:** This update introduces a redesigned review status bar, offering a new votes overview, a streamlined interface for owners, and a hover effect showing more details. Review Overview Widget for Administrators

  Learn more

- **Review Overview Widget for Administrators:** Administrators with *Access All Reviews* permission can now view all system reviews, regardless of participation status. New *Admin* persona option.

  Learn more

- **Filter Configuration Improvements:** The improved filter configuration process for Review Manager widgets provides greater clarity and accuracy. Administrators now choose a user role (*Owner*, *Reviewer*, *Guest*, *Uploader*, or *Admin*) before configuring filters.

  Learn more

- **Additional Enhancements and Changes:** This upgrade introduces a multitude of small improvements. Key changes include a new confirmation dialog for review approvals, refined administrator permissions, API modernization, performance optimizations, terminology updates, and tweaks to the @mention system.

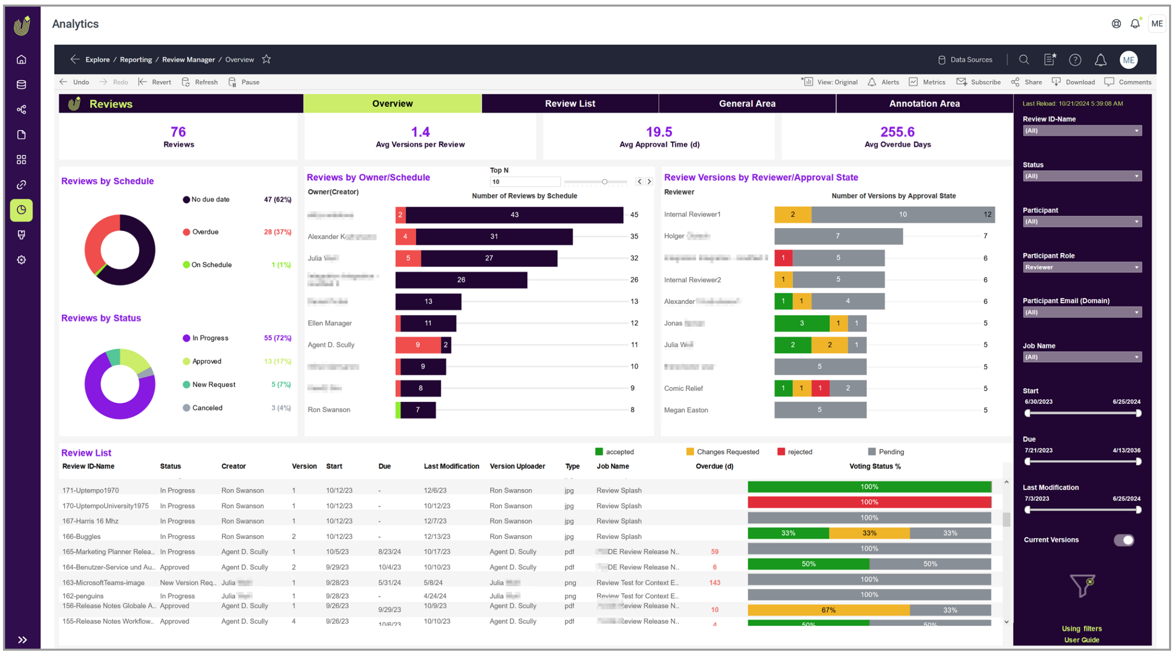
  Learn more

- **Review Manager Discontinuations:** The ability to initiate standalone reviews and send mass participant emails has been retired, while administrator permissions have shifted to provide more precise access control through a read-only model.

  Learn more

Analytics

- **Review Manager Insights:** The Analytics module now offers a standard dashboard for the Review Manager. The dashboard provides a visual representation of a range of metrics related to your organization's usage of Review Manager. This allows for a comprehensive overview of your review processes at a glance, enabling you to swiftly identify trends and potential areas for improvement.



API

- **Our APIs have been updated:** For details on the improvements and changes, please refer to the module descriptions.

  Learn more

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Global

Experience enhanced security and streamlined access through an updated authentication page featuring SSO integration, automated SAML user creation, and customizable logout redirects. The modernized interface introduces a collapsible sidebar navigation system alongside significant performance improvements as the database is now powered by MySQL 8.0, delivering optimized query processing and advanced JSON support.

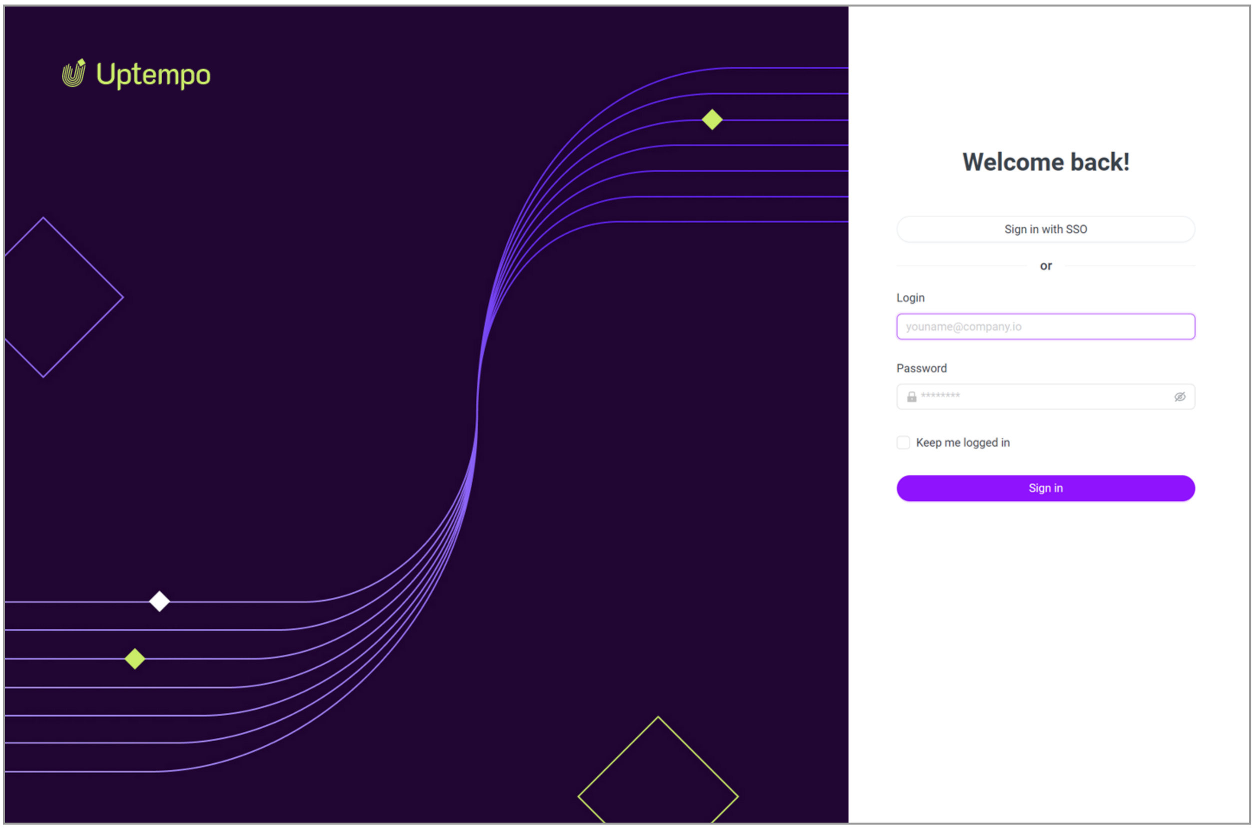
New Login Page

We've launched a new login page for Uptempo, providing a streamlined way to access the platform:

- Single Sign-On (SSO) Support: Log in seamlessly using your organization's SSO credentials.
- Email and Password Login: Enter your full email address as your username, along with your Uptempo password.
- Password Visibility Toggle: Easily check your password entry for accuracy.
- Direct Navigation: After logging in, you'll be taken straight to your default start module.

This new login page lays the foundation for secure access to Uptempo. We plan to add more features like password recovery in future updates. Once SSO has been enabled on the system, a button will be displayed on the login page, allowing users to log in via SSO.

To access Uptempo, navigate to the login URL provided by your administrator. Select your preferred login method and enter your credentials to get started.

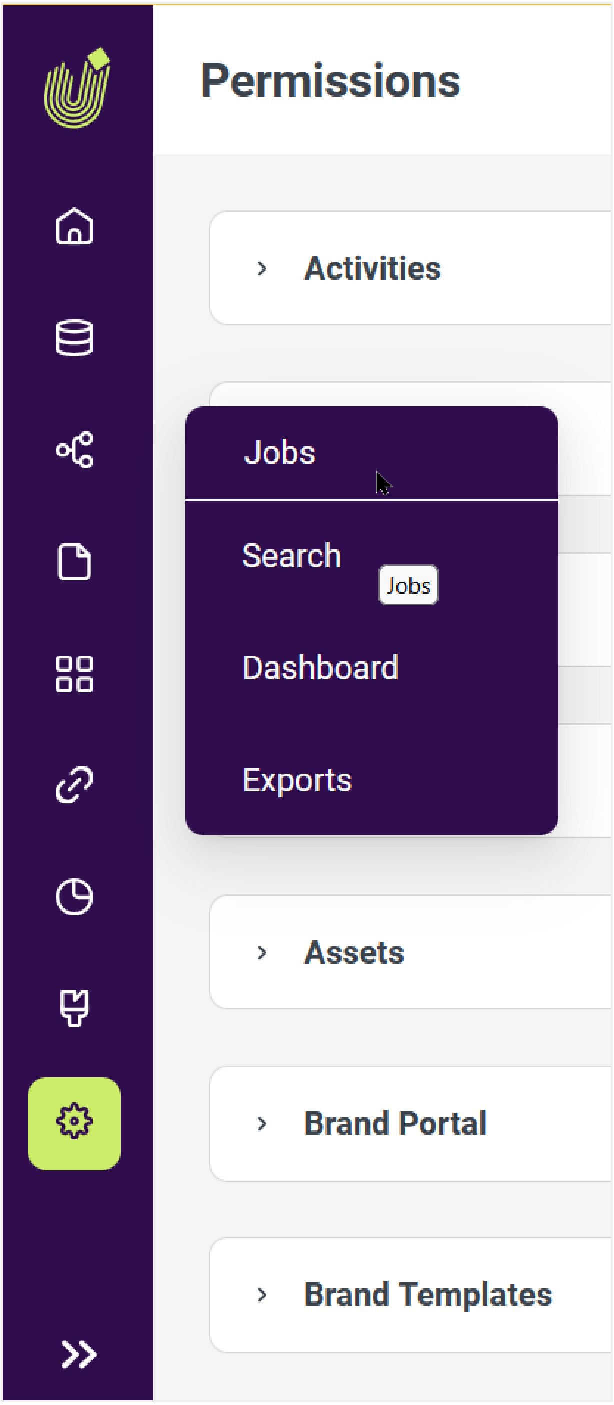


Note

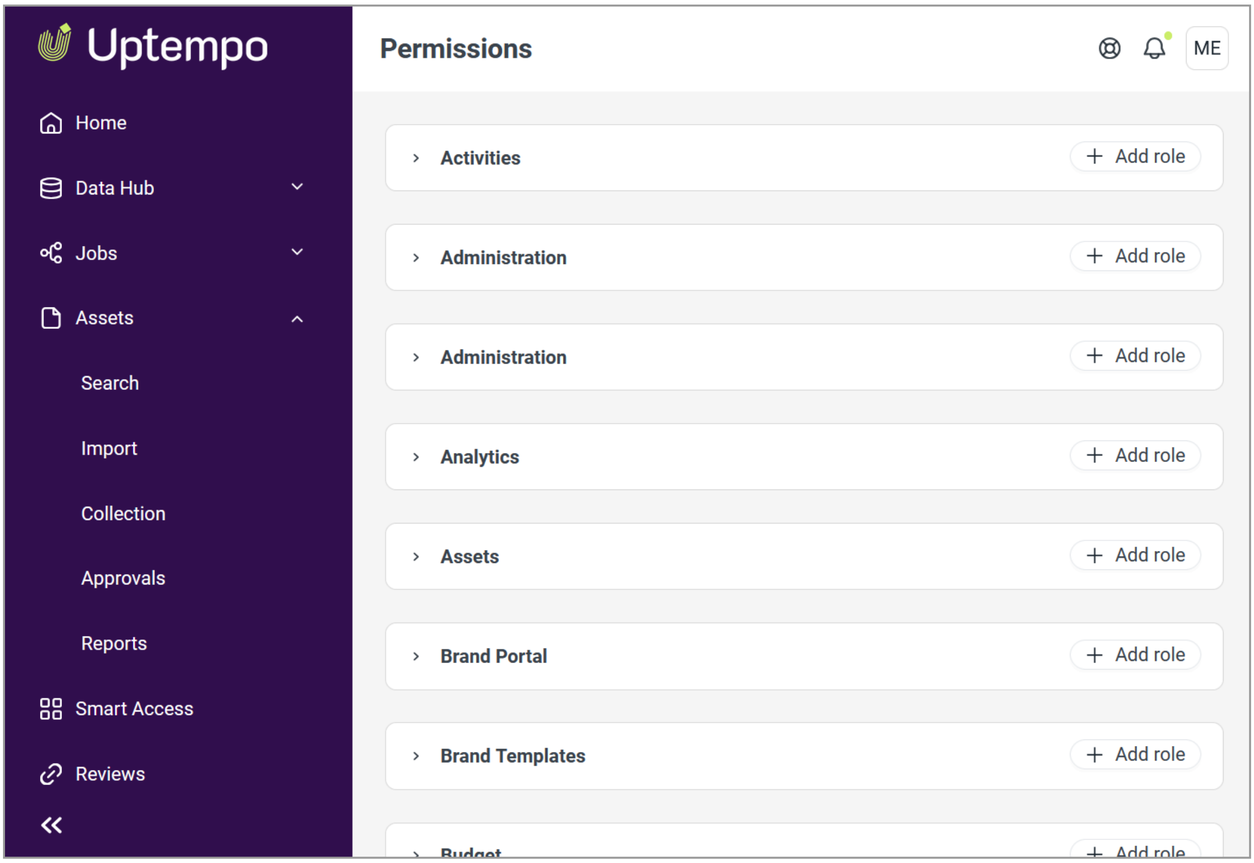
While it was possible to use just a username like “Peter” up to BrandMaker version 7.4, this is no longer supported. To ensure optimal functionality with the Uptempo platform, please configure usernames as a full email address.

New Navigation

Click an icon in the side navigation to navigate between modules and pages. The following screenshot shows the collapsed side navigation on the left side of the screen.

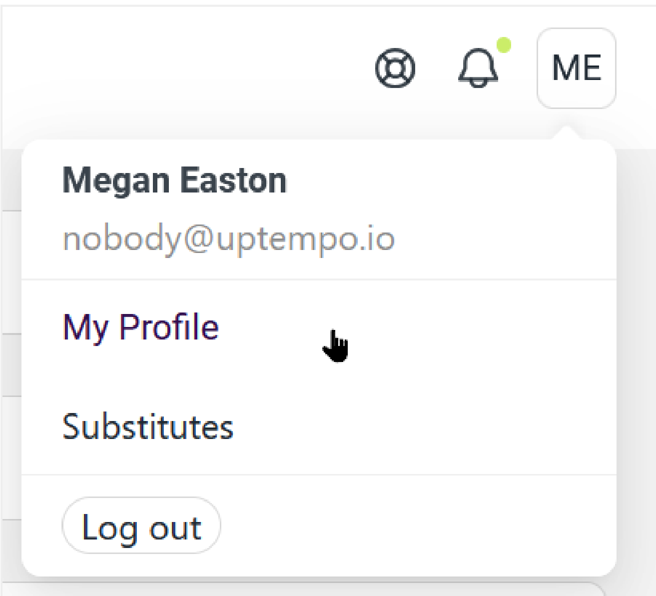


If you want to navigate using the text menu, click the arrow icon at the bottom of the side navigation bar. This will unfold the side navigation and show you the names of the start pages for each module.



If available, you can also reach sub-pages in the side navigation, by clicking the down arrow.

In the header on the right side, clicking on the user's initials will open a menu where users can reach their personal profile and the logout button:



The user can set a substitute, change their password or choose their preferences, such as their personal homepage or product language.

The menu below the life ring icon lists customizable items and always includes a link to the online help for the current module.

Database Upgraded

We are now using MySQL 8.0 as relational database management system. Upgrading the Work Management modules to MySQL 8.0 provides performance improvements and new features for building future-proof applications. It includes an improved query optimization, enhanced security measures, and better JSON support.

Global Discontinuations

Some features were part of our product offering up to Version 7.4. As we've evolved our platform, we have replaced some of these features with improved capabilities while others have been phased out. If you relied on any of these features, please contact your Uptempo representative to discuss alternative solutions or workflows in the current release 8.0.

SOAP Replaced by REST

As part of our ongoing commitment to modernization, we've now transitioned all modules fully to our REST API. As previously communicated, this change allows us to focus on developing new features and providing more efficient support. While the SOAP API is no longer available, our REST API offers improved performance and flexibility for your integration needs. Please refer to https://developers.brandmaker.com/api/.

Account Request Feature Removed

As of version 8.0, the *Account Request* feature has been removed. This includes:

- The account request form on the login page
- The ability for users to submit account requests
- Administrator workflows for processing account requests
- Email notifications for request approvals/rejections

Why this change was made:

- The existing Account Request process had limitations that made it challenging to use effectively in enterprise environments:
- Requests were sent to all administrators rather than specific groups
- Users had to select an administrator from a predefined list
- The administration and workflow were overly complex

Future plans:

We plan to introduce an improved account request and provisioning process in a future release. The new implementation will address the limitations of the previous version and provide a more streamlined experience for both users and administrators.

If you have any questions, contact your Uptempo representative.

Review Manager Module

The Review Manager module will no longer appear as a standalone module in the main navigation.

Impact

You will no longer see the Review Manager as a separate module in the main navigation.

Solution

You can maintain access to the Review Manager functionality by creating custom navigation links to the :

- Navigate to *Administration* > *Overview* > *Look & Feel* > *Navigation*
- Click *Add custom link*
- Configure the link to point to your Review Manager dashboard in the *Home* module

Other Discontinuations

Feature	Description
Microsoft SQL	Support of MS-SQL databases for customer systems is discontinued. We now only support MySQL 8, effective for all customers upgrading from BrandMaker 7.4 or earlier.

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Home

Transform your workspace through flexible widget customization and refined grid behavior featuring smooth transitions and automatic alignment. Enhanced dashboard controls include Review Manager integration plus an advanced Fusion UX Logic widget, enabling direct application management from a central interface.

Reworked Grid Behavior

In release 8.0, we reworked the drag-and-drop behavior for widgets. Before, other widgets did right jump out of the way, making moving a widget difficult and unpredictable.

The most significant changes are:

• Movement delay: Widgets only move after 400ms instead of immediately. This makes the movements more natural.

• Smoother movements due to reduced speed

• Reset to top position: when dropped, the widget will be vertically moved to its highest position possible without moving other widgets. Previously, this behavior could be activated per dashboard (*Vertical Alignment checkbox in Dashboard* settings). With this version, it is the default behavior for all *Home* dashboards.

• Preview position displayed with shadow while dragging.

These improvements make the placement of widgets in the dashboard feel smoother, more fluid, and more predictable. Users always have full control over the position and layout. When you move a widget and put it back, the layout stays the same. All widgets go back to where they were. Overall, these changes make it more convenient to customize the layout of the *Home* dashboard.

Fusion UX Logic Widget

We introduce the new *Fusion UX Logic* widget to give you control over your web component application's user experience. This widget allows users with *Manage Fusion Apps* permissions in their Administrator role to directly manage and edit their Fusion UX components from the *Home* module dashboard.

Key features

- Access and modify Fusion UX Logic components directly from your dashboard
- Place multiple Fusion UX Logic widgets on a single board for flexible organization
- Open the full component mapping modal to make comprehensive changes
- Edit existing Fusion UX Logic widgets to update component mappings

Using the widget

1. Add the *Fusion UX Logic* widget from the widget collection when editing your *Home* dashboard.
2. Click the button to open the component mapping modal.
3. Make your desired changes to Fusion UX components.
4. Save your updates.

   The widget's edit dialog displays a preview of the selected web component. This allows you to verify the correct function and display during configuration.

The Fusion UX Logic widget streamlines management of your application's user experience components. You can now make quick edits and updates without leaving your dashboard.

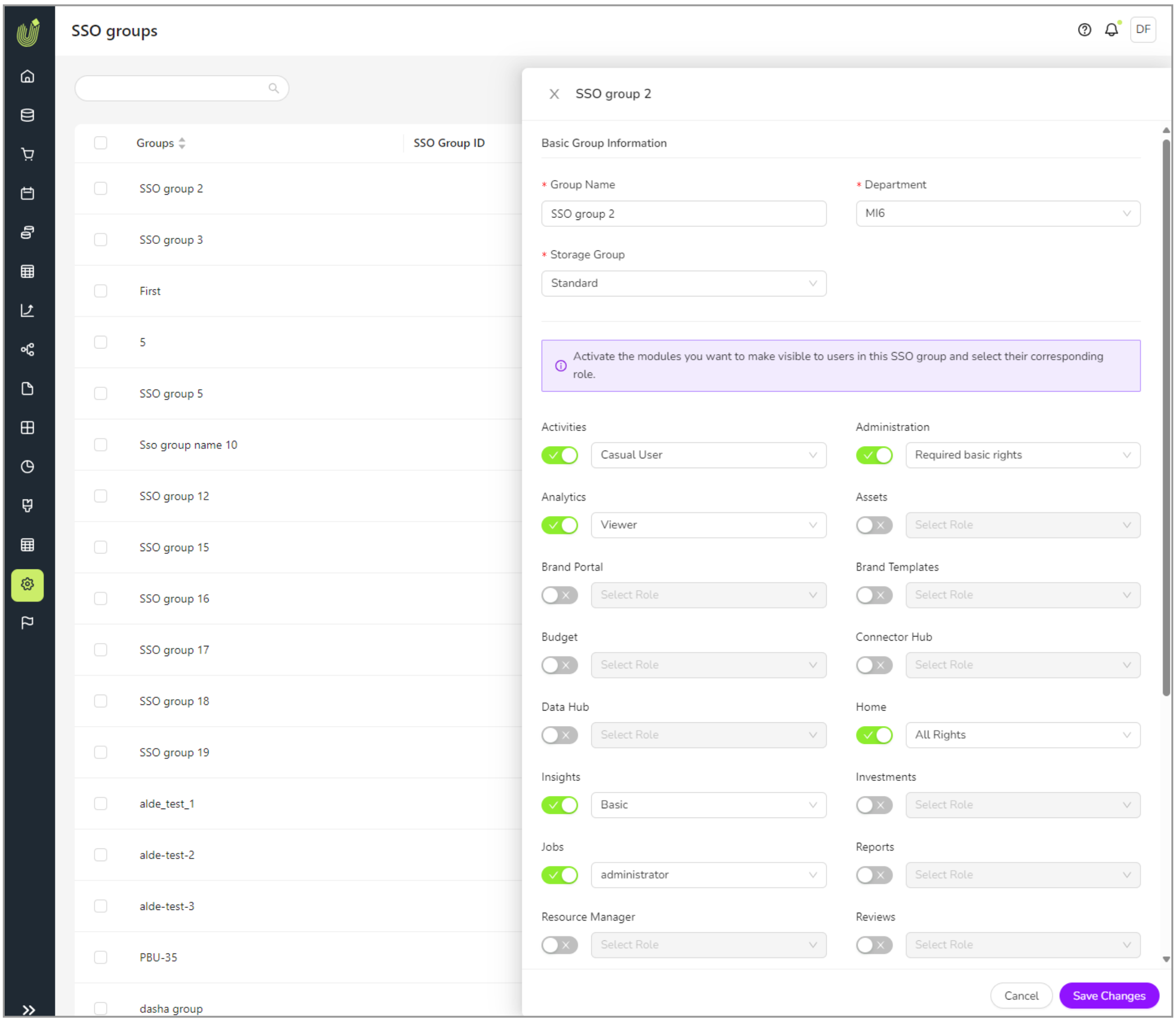
> Note
>
> This feature is only available to users with *Manage Fusion Apps* permission. Contact your administrator if you need access.

Administration

Streamline organizational control through revamped user management that combines self-service options with powerful SSO integration and automated account creation. Empower administrators to temporarily login from a user perspective, manage custom authentication workflows, set personalized logout destinations, and much more for smoother operations.

Early Access Automated User Creation via SAML for SSO Integration

This is a beta release for selected customers.



What's Changing

- We're enhancing our SSO integration to automatically create and synchronize user accounts across Uptempo using SAML data from Identity Providers (IDPs).
- This beta release includes functionality for user creation and updates via SAML.
- The new feature integrates with our existing SSO Group Feature to automatically apply appropriate permission templates during user creation.

Why It Matters

- Eliminates the need for manual user entry in Plan & Spend when users are added in *Uptempo* via SSO.
- Streamlines the user onboarding process, providing quicker access to necessary resources.
- Ensures consistent application of permissions and user data across platforms.
- Reduces administrative workload and minimizes potential for human error in user data entry.

> Note
>
> This is an early access (beta) release. While core functionality is available, some features are still in development.
>
> - This release does not include user deletion and substitution functionality.
> - We encourage our beta users to begin testing the available functionality. Your feedback will be valuable as we work towards a full release.

Single Sign-On (SSO) Integration

This release introduces Single Sign-On (SSO) capabilities, with a new interface, allowing seamless authentication via an Identity Provider (IDP).

Key Features

- SSO login option on the login screen
- Backend integration with IDP for secure authentication
- Simplified access across integrated systems

Benefits

- Streamlined login process for users
- Enhanced security through centralized authentication
- Improved user management for administrators

Enable SSO

1. Configure identity provider (IDP) connection settings in system administration
2. Enable *SSO button* option in system settings
3. The SSO button will appear on login screen for users

> Note
>
> Proper IDP configuration is required for SSO functionality. Contact your IT team for assistance with setup.
>
> For more details on configuring and using SSO, please refer to the updated Administrator documentation.

Early Access Log In As Feature

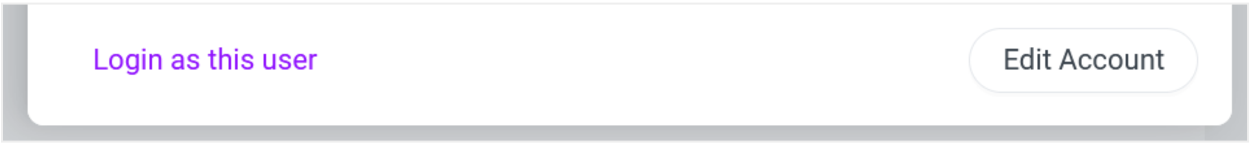
This is a beta feature hidden behind a feature flag in October 2024 release. It will be available for general availability within the next month. As an administrator you can log in as a different user. Impersonation lets you see and use the platform like the selected user. This feature helps you provide effective support.

To use this impersonation mode, you need administrator access with the *Manage User* permission.

Using Log In As

1. Navigate to the *Administration* > *User List* section.
2. Select the user you want to impersonate.
3. Click *Login as this user*.

   A banner at the top of the screen indicates that you are in impersonation mode.



During Impersonation

- You see exactly what the selected user sees in their role
- You have access to the same features and data as the user
- Some administrative functions are not available
- To exit impersonation mode, click *Exit Impersonation* in the banner.

Security and Privacy

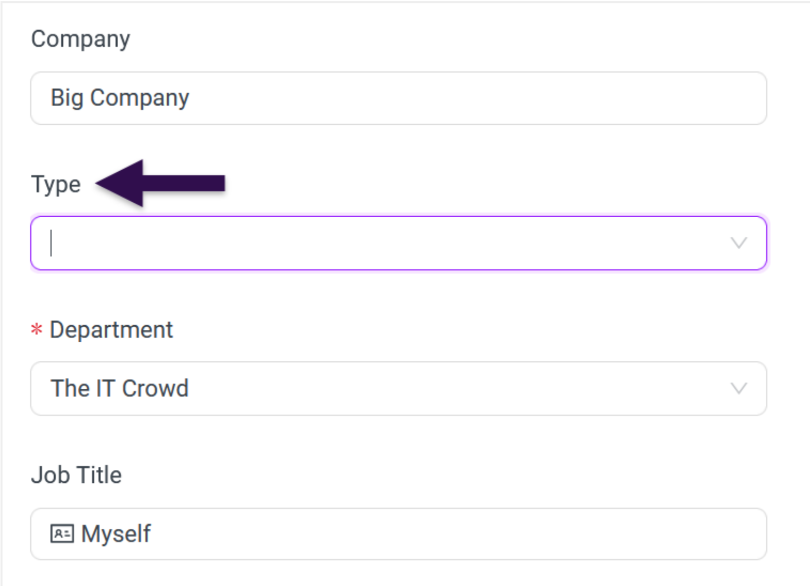
- Only certain administrators with special *Manage User* permission can use this feature
- No user passwords are required for impersonation
- User personal information remains protected

Early Access User Type Field in Admin User Profile

The former *User Type* field has been restored to the user profiles of administrators to support Single Sign-On (SSO) configurations that require user type designations.

Key Changes

- Added *Type* attribute field to user interface of an administrator profile
- Maintained compatibility with existing backend structures in version 8.0 and CS/CO



Use Cases

You can use this feature to:

- Mark specific users for manual administration instead of SSO management
- Maintain user accounts that require special handling outside the SSO workflow
- Support SSO implementations that depend on user type designations

Logout Redirect

Administrators can now configure a custom URL for users to be redirected to after logging out of Uptempo. Before, users were always redirected to the Uptempo login page by default upon logging out. But many companies require the ability to direct users to a specific URL after logout for continuity or security reasons. With this feature, users experience a seamless transition post-logout, being redirected to a URL that is relevant and predetermined by their organization. This enhances their overall interaction with the platform. Administrators gain control over the logout flow, ensuring it aligns with organizational policies and user expectations.

Details

- By default, users are redirected to the Uptempo login page upon logout
- Administrators can now set a custom logout redirect URL in System Settings
- The custom URL allows redirecting users to a specific page after logout (e.g. company intranet)
- Enhances security and provides a more seamless logout experience

How to configure

1. Go to *Administration* > *Overview* > *System Configuration* > *System Settings*.
2. Search for *Logout* to locate the setting named *brandmaker.logout.custom.url.*
3. Enter the desired redirect URL in this field.
4. Once a change has been made, it will be automatically saved after you press Enter.

The custom URL will now be used for all user logouts.

> Note
>
> The URL must be a valid, fully-qualified URL (e.g. https://company.com/home).
>
> If left blank, the default Uptempo login page redirect will be used. Make sure the target page is accessible to logged out users.

Team Assignment

The dropdown list under *Assign Team* to a user in the *Edit User Account* > *Membership* modal will now be sorted alphabetically instead of by creation date.

Why it Matters

- This change improves usability, especially for customers with many teams.
- You can now more easily find and select the desired teams when assigning them to users.

Previously, it was difficult to locate specific teams without knowing their exact names. The new alphabetical sorting provides a more intuitive and efficient way to browse and assign teams.

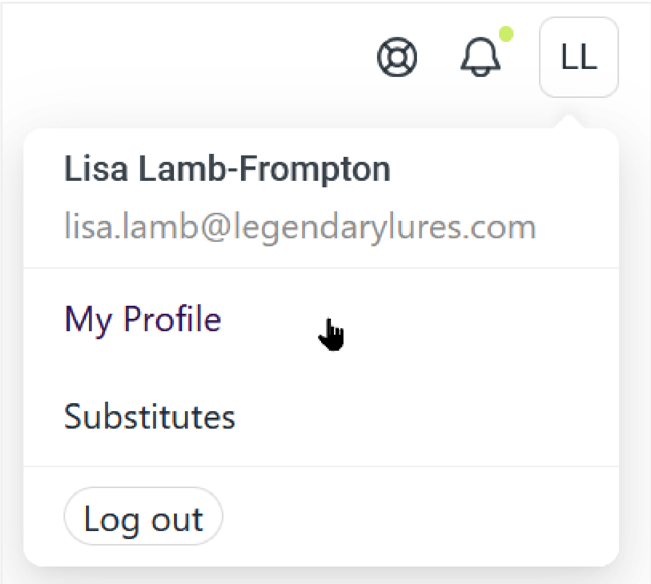
User Management

This release centralizes user management into a single, streamlined interface.

All areas of the previous administration that have not yet been converted to the new interface can be found under the entry Overview. Conversely, users and roles can no longer be customized in the old way. The counterparts for the newly implemented features presented here have been removed from the Administration interface.

Key improvements include:

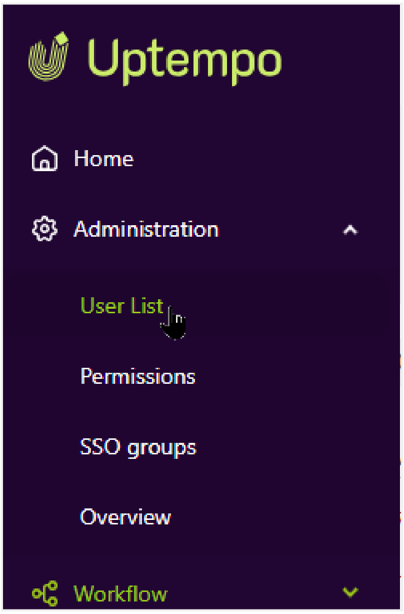
- Consolidated user configuration: All user settings, permissions, and roles can now be managed from one central location. Previously, these were spread across multiple areas of administration.
- Guided setup: The new interface guides administrators through the user configuration process, reducing the risk of errors or incomplete setups.
- Self-service affiliate management: End users can now edit their own Affiliate IDs directly from their user profile (Click your Initials, then select *My Profile > Settings*). This includes the ability to reassign affiliates when job responsibilities change, without requiring administrator intervention.



These updates simplify user management, reduce configuration errors, and empower end users to manage certain aspects of their own accounts.

Under the expanded Administration menu, you'll find several options related to user management:

- Click on *Administration* menu item in the left sidebar.
- Click *User List* to view and manage existing users
- Select *Permissions* to configure user permissions and roles
- Choose *SSO groups* to manage Single Sign-On group settings
- Click "*Overview*" for more settings and configuration

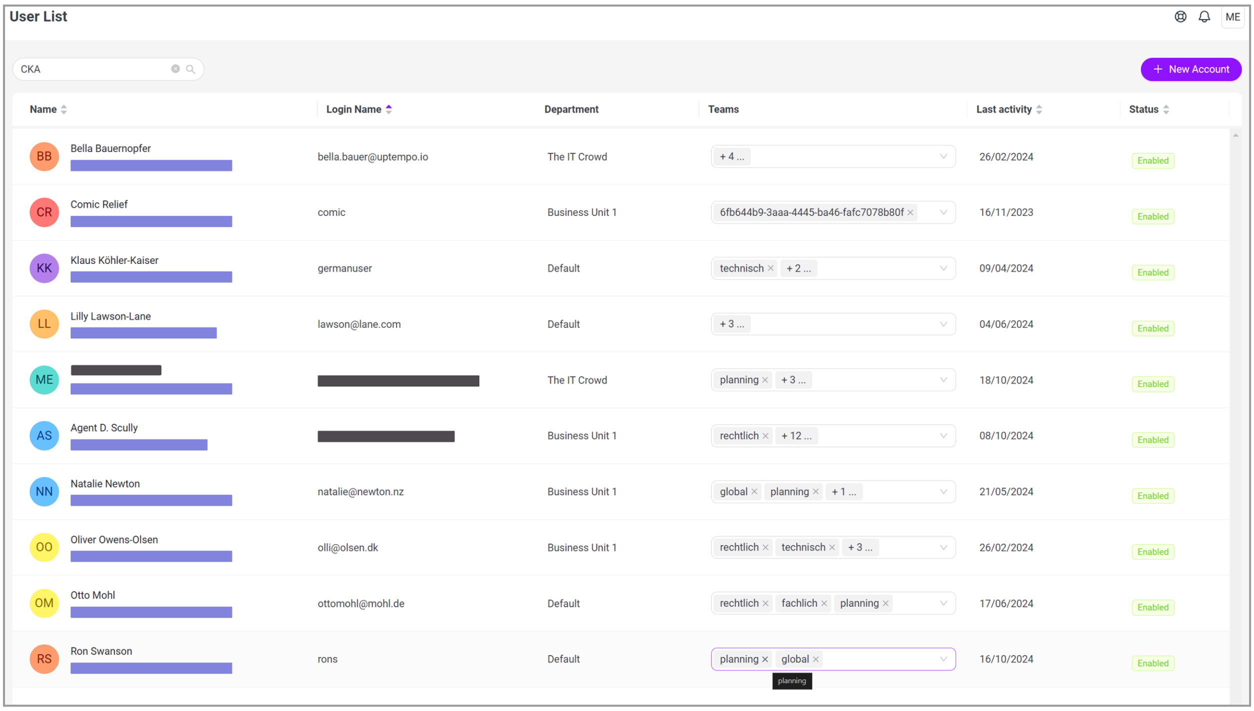


These options allow administrators to access the centralized user management features described in the release notes, including user configuration, permissions setup, and role management.

User List

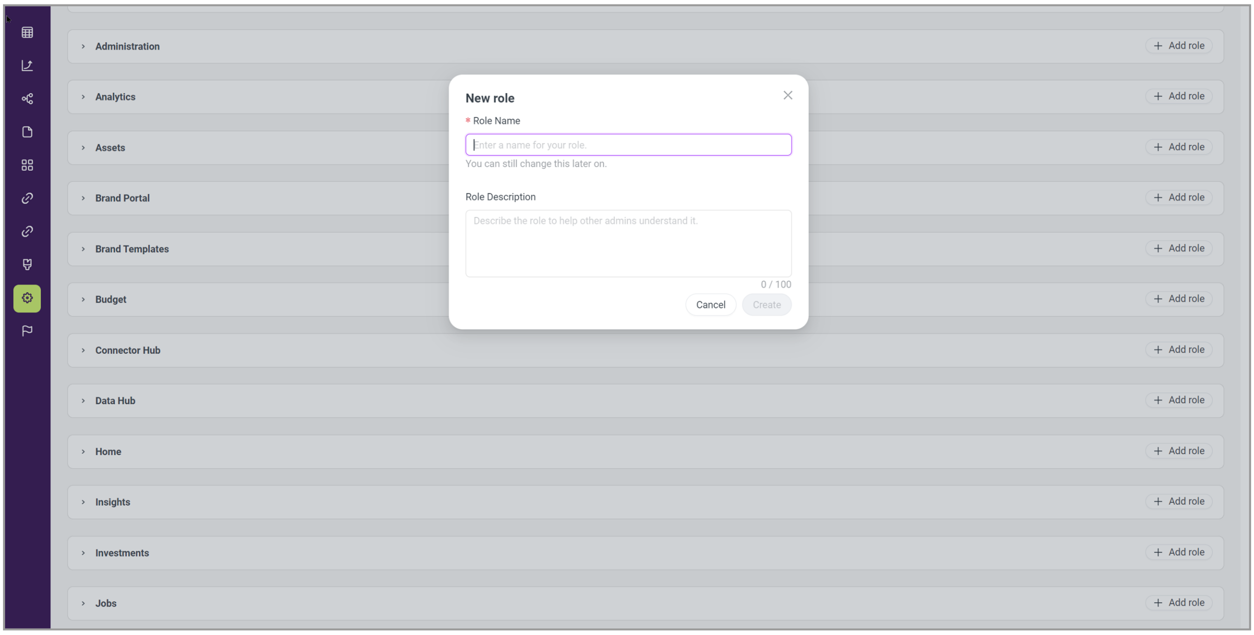
In the user list, anyone with the appropriate permissions can see the users created in the system, the departments and teams to which the names are assigned, and the timestamp of the last login. By double-clicking on a user in the list, the user account can be edited. Memberships and roles are edited and changed via the corresponding tabs.

While hovering over the *Teams* section, a user can be removed from a team without having to open their account. Simply click × next to the team name to remove them. In the *Status* column, you see enabled and disabled users. Just click the button to change the user status.



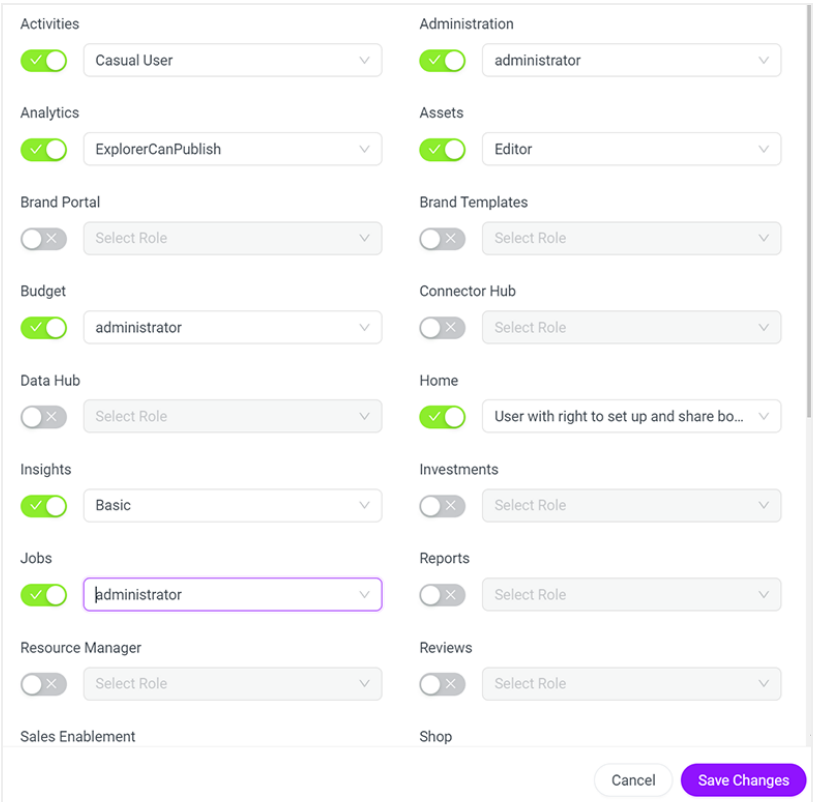
Permissions

In this window you create new user roles for Uptempo Work Management, copy existing roles, edit and delete roles.



SSO Groups

Under this entry you will find the configuration of the SSO groups. Use the New Group button to create a new group. Select a default group from the list by moving the slider under *Use as Default* to active. Other functions are *Duplicate* and *Delete* a selected SSO Group.



Overview

This menu item corresponds to the legacy BrandMaker administration, which has been cleaned up but is still used for all other module configurations and system settings.

Discontinued in Administration and User Attributes

Discontinued Modules

SEW

The module SEW (Sales Enablement Workbench) has reached its end of life (EOL) and is no longer supported in version 8.0.

DMC

The module DMC (Digital Marketing Center) has reached its end of life (EOL) and is no longer supported in 8.0.

Mobile

The Apps for iOS and Android are incompatible with the latest version and not available for download anymore.

Attributes

Until version 7.4, user profiles included attributes like *Title*, *Remarks*, *MPM*, *Permitted* login status, and *Salutation*. These fields allowed for detailed user information and customized communication. The discontinuation of attributes streamlines user profiles, aligns with modern application practices, and removes outdated or unused features.

Change Management

Deprecated attributes without replacement:

- *Title*
- *Salutation* (emails will use first name and last name only)
- *MPM* (This module is officially deprecated)
- *Permitted* for login as user

Remarks will migrate to a new *About* field in user profiles, but without connection to account requests.

Other Discontinuations

Feature	Description
EDIT_MY_DATA removed	When you have the *Module Access* permission in version 8.0, you can automatically access and edit your own user profile data that you're allowed to edit by default. Up to version 7.4, there was a separate permission named *EDIT_MY_DATA*, which has been removed.

User Service

With version 8.0 we introduce a completely new *User Service*, replacing the technology used in versions up to 7.4. This fundamental change affects all aspects of user management across the platform.

Key Changes

1. New User Service Implementation
    - Replaces the previous system used up to version 7.4
    - All modules adapted to work with the new User Service
    - Significant changes to user-related features across all modules
2. API and Data Structure Updates
    - New User Service API: Uptempo Developer Portal
    - Updated user data structures to support enhanced functionality

Transition and Compatibility

- Version 8.0 maintains limited backwards compatibility with the old user service
- Existing values and data structures from the old user service are still accessible in the new version
- We strongly recommend transitioning to the new User Service after upgrading

Upgrade Considerations

- Conduct a comprehensive audit of your current user service interactions
- Develop a thorough testing and migration plan

- Prepare your team for changes in user management workflows

Future Plans

- Support for the old user service will be removed in a future release
- Plan your transition to ensure a smooth upgrade path for future versions

User Import & Export Changes

In version 8.0, we've made significant changes to the user import and export functionality and removed some of the old behavior.

What's Discontinued?

- The full user data XLS import/export previously available in *Administration* > *Users & Groups* > *Users* has been removed
- Bulk editing of user data via XLSX import is no longer supported

User Export Improvements

- User data export is now available as a standard XLSX report in Analytics
- You can export this report to XLS format for further analysis or editing

Job Manager

This new version can handle four millions of jobs at once. You can assign tasks to groups, track participants, and switch between jobs and activities. It has better workflow capabilities, including creating sub-jobs, searching for text, and controlling participants and transitions.

Navigating Between Activities and Jobs

Seamless switch between activities in Plan module and jobs in Work module without losing context.

Opening a Job's Linked Activity

1. Open the job in the Jobs overview.
2. Make your changes to the data sheet if needed.
3. Click *Save* to commit your changes.
4. Click *Go to activity*.

   The system opens the *Details* panel of the linked activity.
5. To sync your recent job changes to the activity:
   a. Click the ... button at the bottom left of the panel.
   b. Select *Sync Activity*.

The activity fields update with your recent job changes.

Opening a Job from Activities

1. Find your target activity in the activity list.
2. Click the activity bar to open it.
3. Alternatively, click the activity row in summary view to open its *Details* pane.
4. Click *Open Workflow* in the top right corner.

The system:

- Switches to the job module
- Opens the linked job's data sheet
- Displays current activity data in the job

Working with Synchronized Fields

Some fields in the job data sheet display activity data and are read-only:

- These fields sync from the activity
- You cannot edit them directly in the data sheet
- Changes made to editable fields in the job sync back to the activity

Technical Details and Configuration

The system maintains references between jobs and activities by:

- Storing activity references when creating jobs
- Displaying activity links on job detail pages
- Enabling two-way data synchronization between linked items

This integration ensures:

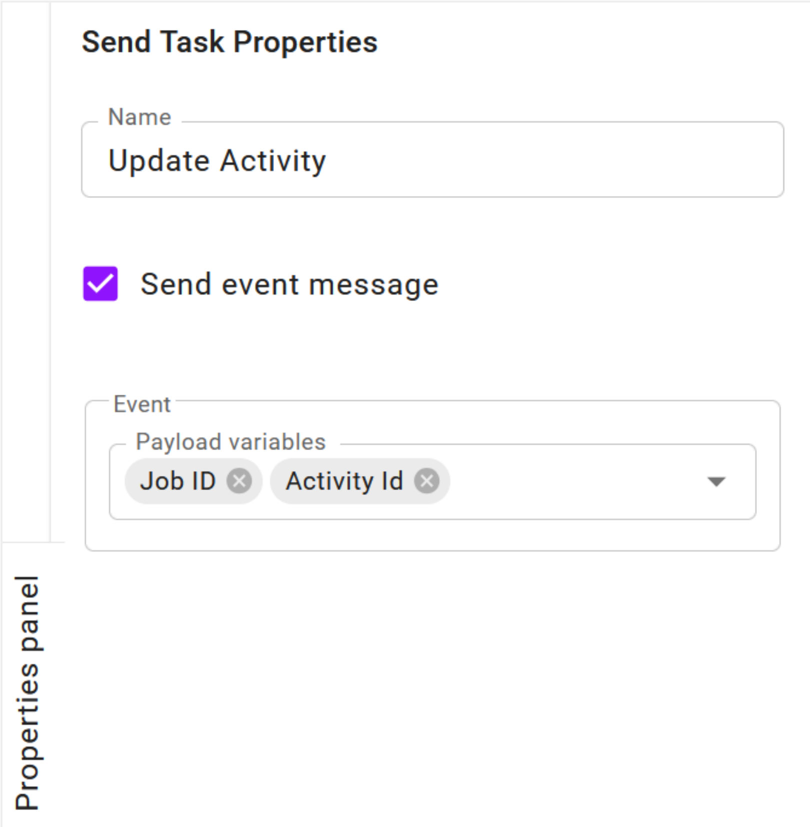
- Seamless navigation between related items
- Consistent data across jobs and activities
- Clear context during workflow management

Configuration: Send Event Message

In Workflow Modeler activate the *Send Event Message* checkbox to perform a synchronization with the selected payload variables in the direction of the activity.

Create a *Send Task* in the Workflow or select an existing one.

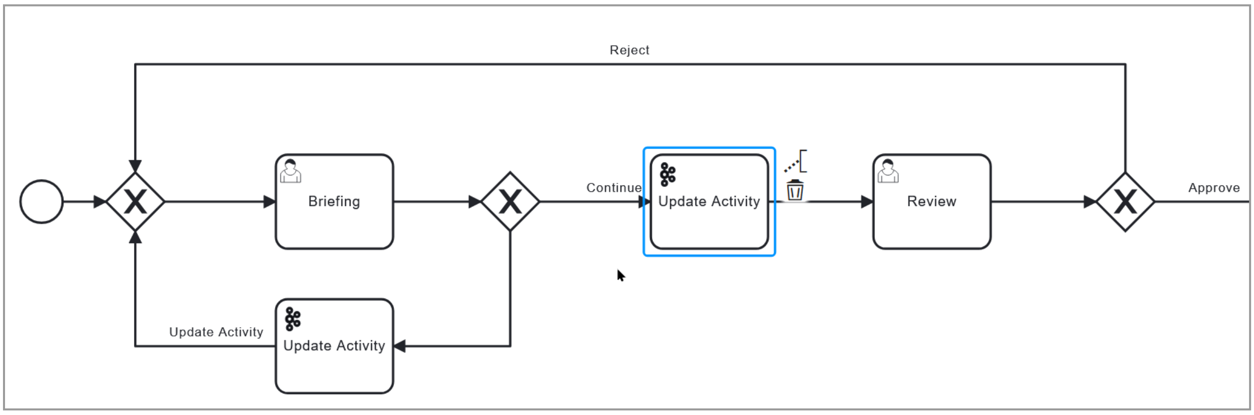
In the *Send Task Properties*, check the *Send event message* box.



The letter icon of the BPMN Send Task changes its appearance to ⌘. The icon serves to indicate all events that are synchronized with activities within the context of workflows.

In the *Event* drop-down menu, select all the variables that are to be sent to the linked *Activity* as payload variables for synchronization in this way.

You have established the connection to an activity in Plan. Activities that are configured accordingly can be synchronized with workflows from the Jobs module that are based on this type.



Dynamic Group Assignment in Workflows

You can now dynamically assign user tasks to groups within your BPMN workflows. This feature adds flexibility to your workflow management by allowing group assignments to be calculated during workflow execution, rather than being determined only at design time of the workflow. Previously you could only assign a fixed group during creation. With the *User Group* field, users can change the assigned group during the workflow.

User Group Variable

The system introduces a new DSE variable type called *user group*. You can place this variable on any datasheet in your workflow. The variable can be configured with default groups and designated as a required field if users are required to select a group at a later stage.

Assignment Options

When configuring user tasks in the BPMN Workflow Modeler, you have several options for group assignments. You can select multiple user groups for a single task and define default assignments to streamline common workflows. For critical workflow steps, you can make group selection mandatory to ensure proper task routing.

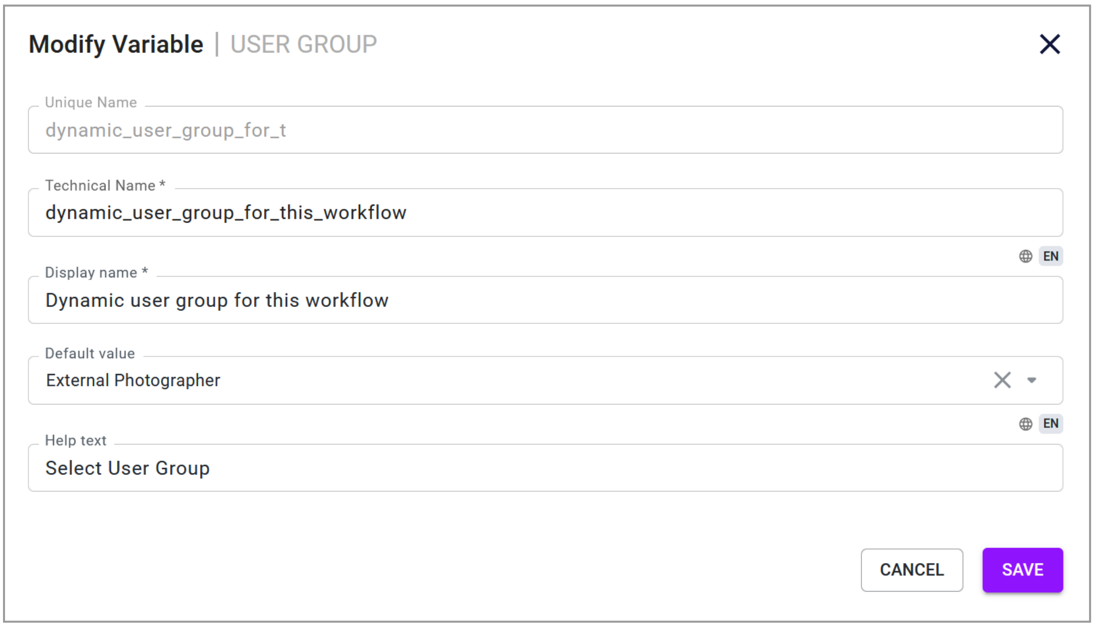
Task Display

Tasks assigned to groups appear in the *Picklist* filter in Jobs overview or on Jobs Dashboard for easy access and management. Every member of the assigned group can see these tasks and claim them for processing. A task remains visible to all group members until someone claims it or it gets reassigned to a different group.

Configure Dynamic Group Assignment

1. Add the *User Group* Variable:
    a. Open your datasheet layout.
    b. Add the *User Group* variable to your layout.
    a. Configure the variable properties:
        - Set a default group (optional).
        - Mark as required if needed.

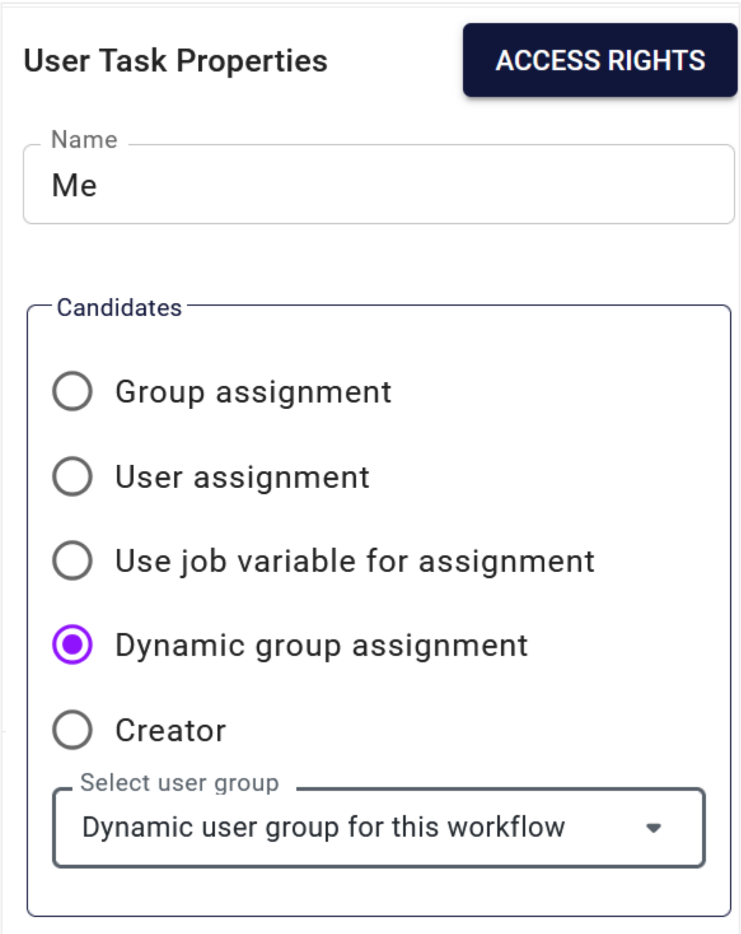
- Define visibility settings.



2. Configure BPMN User Tasks:
    a. Open the BPMN Workflow Modeler.
    b. Select a user task.

c. In the task *Properties*, enable *Dynamic Group Assignment*.

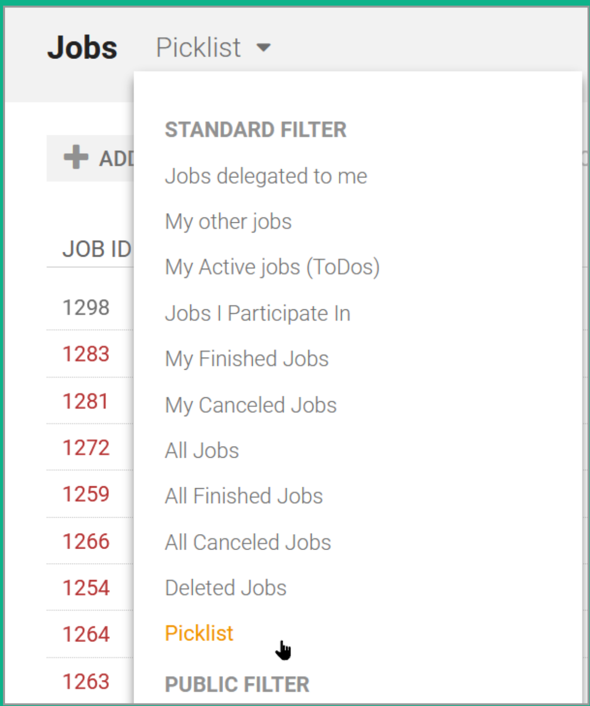
d. Link the task to the *User Group* variable.



EXAMPLE

Consider an approval workflow where different departments need to review documents:

1. The owner/creator starts the workflow.
2. They select the appropriate review group from the user group field.
3. When the workflow reaches the review task:
    - The task appears in the selected group's *Picklist* filter.



    - Any group member can claim and complete the task.
    - The workflow proceeds based on the group's decision.

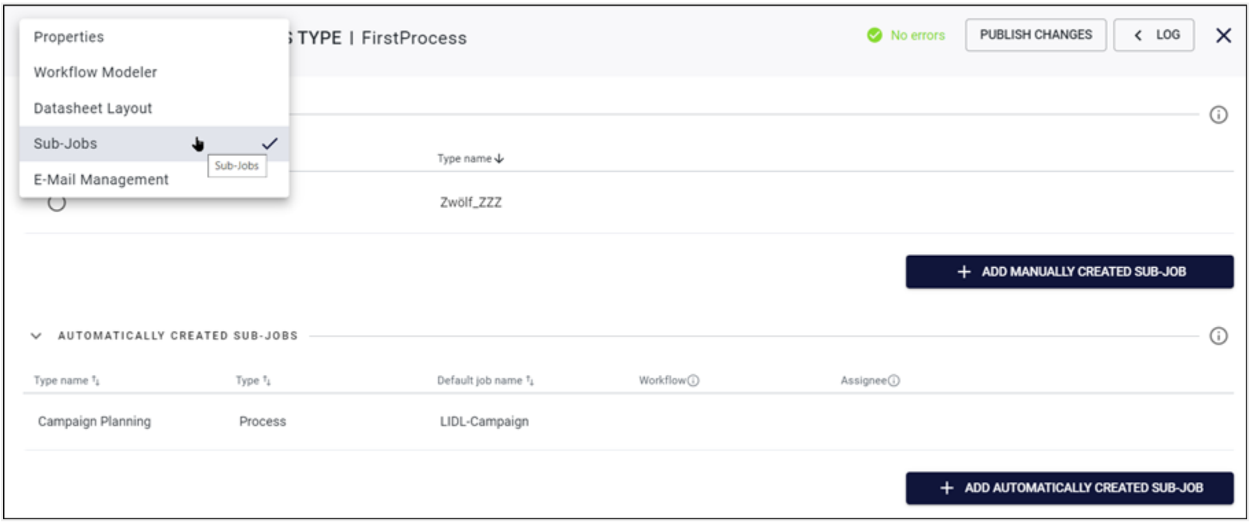
> Note
>
> Once a task is assigned to a group, it remains visible to all group members until claimed. Group assignments can be changed during the workflow if needed.
>
> The *User Group* variable can be used in multiple tasks within the same workflow. Default assignments can help streamline common workflow paths.

Flexible Creation of Sub-Jobs in BPMN Workflows

You can now create and manage sub-jobs at any point in a workflow without triggering status changes in the parent job. This update introduces a dedicated sub-jobs page in the process data sheet layout and improves the overall handling of complex processes.

This feature includes:

- Separate new page for sub-jobs in the process data sheet layout:
  - More flexible process creation
  - Create sub-jobs at any workflow stage
  - Bulk create multiple sub-jobs
  - Simplified sub-job management
  - Access sub-jobs through a dedicated page in process data sheets
- Creating sub-jobs independent of workflow status
- Validations on deletion to prevent errors when deleting sub-jobs.
- Clear presentation of sub-jobs: Differentiation between job and process sub-jobs in tables.



Configuration

You can now configure sub-job creation options in the job type configuration:

- Define which sub-jobs can be created manually or automatically
- Configuration is similar to classic jobs

Enhanced Sub-Job Inheritance for BPMN Workflows

You can now see inherited variables from parent jobs more clearly in your BPMN workflows. The system displays these variables with a clear *Inherited from parent* indicator. This enhancement streamlines the sub-job inheritance process in BPMN workflows, making it more intuitive compared to Classic jobs. The implementation focuses on clarity and error prevention while maintaining data integrity across job hierarchies.

Key Improvements

- Clear visibility of inherited values
- Simplified inheritance configuration
- Read-only protection for inherited variables
- Streamlined variable management

What Changes

Variables inherited from parent jobs are now:

- Clearly marked as inherited
- Protected from accidental changes
- Visible in the datasheet layout
- Automatically synchronized with parent values

New Configuration Options

You can now configure variable inheritance directly in the datasheet layout:

- Select which variables should be inherited
- View inheritance status clearly for each variable
- Configure inheritance settings without complex parent-child relationships

Benefits

Unlike Classic Jobs, BPMN workflow inheritance now offers:

- No need for single-parent / multi-parent inheritance management
- Clearer indication of inherited values
- Simplified configuration process
- Reduced risk of configuration errors

Usage Guidelines

When working with sub-jobs:

- Inherited variables display their source
- You cannot modify inherited values in sub-jobs
- All inheritance configurations are managed through the datasheet layout
- Changes to parent job values automatically reflect in sub-jobs

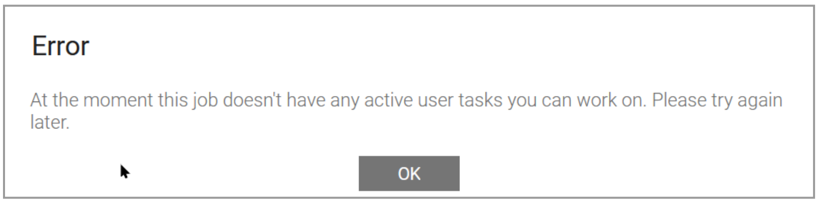
Former Assignees Automatically Added as Participants to Jobs

In some cases, users may want to access a job that they have participated in at a later date, even if they are no longer involved in it, by using the *Jobs I Participate In* filter on the *Job Manager* search page. Previously, when users without sufficient permissions attempted to reopen a job again after forwarding it, they would receive an error message that was not easy to understand.

Seamless addition as a participant ensures that former assignees retain visibility into jobs they previously worked on, while enforcing appropriate access control. This update delivers a consistent experience for users across all job types, including processes (BPMN-based jobs).

Previous Behavior

Up to version 7.4, if a user is no longer the assignee of a job after forwarding it to the next step, the user loses access to that job. Even though the job still appears in their *Jobs I Participate In* filter, they receive an error when trying to open it.



This limited access to the details of the jobs they previously worked on creates unnecessary challenges for users.

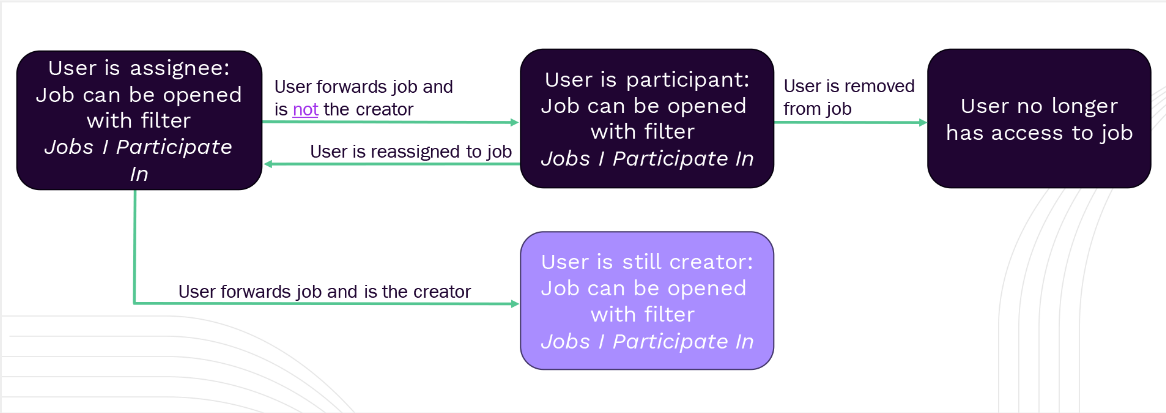
New Improved Behavior

In this release, we have enhanced the user experience for managing participants on jobs in the backend. When a job is forwarded to the next step, any former assignees are automatically and seamlessly added as participants.

They will remain listed as a participant in the job's participant list in subsequent workflow steps to show who has access to and still is or was involved in the job. This allows anyone who has ever been an assignee on a job to retain access and open that job from their *Jobs I Participate In* filter with permission settings of a *Participant* role.

How it Works

- When a user forwards a job they are assigned to, the system will automatically add them as a participant in the background, with no user interaction required.
- The user will be listed under the *Participants* tab of the job.
- The job will remain accessible from their *Jobs I Participate In* filter.
- They can open and view the job, but with the access rights of a *Participant* role.
- If they later become the assignee again, they will revert to the *Assignee* role without an extra participant entry.
- If they are also the creator, they will remain listed as creator without a participant entry.
  - Participants can be manually removed, revoking their access.



To avoid spamming users with notifications, no e-mail notification is sent when users are automatically added as participants in the background.

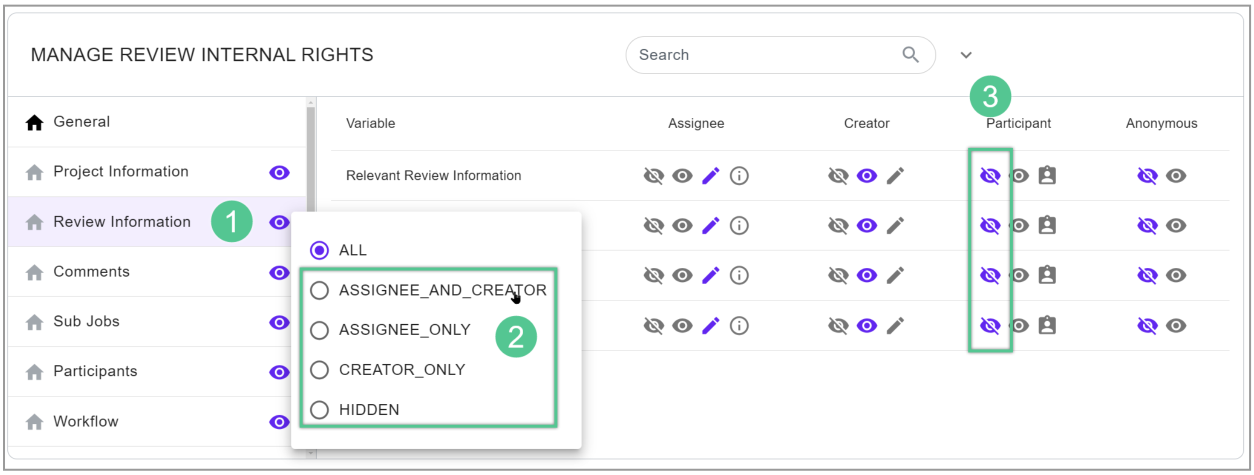
This change does not affect Job Manager administrators and power users with "act like" permissions (e.g. *Act like Assignee*, *Admin JM Request*) as they always have full access.

EXAMPLE
An agency that was an assignee in step 3 will also be able to open the job in step 7 with the limited access rights for a participant role. They will then see the datasheet and all its fields as configured for this role.

Post-Update Administrator Actions

It is recommended to follow these actions after updating.

> **Note**
>
> If there are certain fields or tabs that you want to remain invisible to mere participants in later phases, you will need to configure the participant access rights for the corresponding user tasks accordingly. Observe 1 - 3 in screenshot and the table actions below .



Action	Description	Reason
Update Access Rights Config-uration	Ensure access rights are configured to restrict participant views to appropriate fields	To maintain data security and prevent unau-thorized access to sensitive information
Review Job Filters	Verify if the *Jobs I Participate In* filter now includes jobs where the user was previously an assignee	To ensure that former assignees can see and access relevant jobs in their filter
Communicate Changes	Inform users about the change in functionality and its impact on job visibility and access	To ensure all users are aware of how the changes affect their workflow and access patterns

Discontinued

Functionality	Description	Reason	Effective Version
Until version 7.4, former assignees are removed from participants.	User task and workflow assignees are no longer removed from the participants list after completing their task.	Filter *Jobs I Participate In* listed jobs that cannot be opened if user was assignee but no longer is.	8.0

> Note
>
> It is not possible to revert to the 7.4 behavior in 8.0 and later.

Context Menu in Job Overview

Previously it was only possible to make a selection in *Job Overview* and then click on a job action in the toolbar. You can now access job actions directly through a context menu and we have also added an option to edit jobs in new browser tabs.

Context Menu for Quick Access

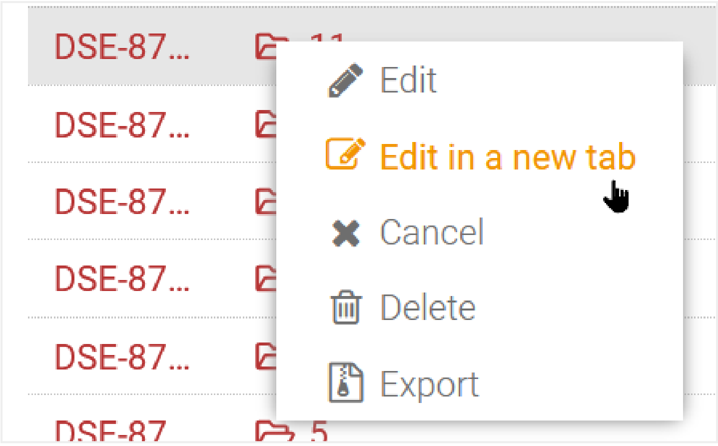
Right-click any job or a selection in the job overview to access these actions:

- Edit
- Edit in new tab
- Cancel
- Delete
- Export

Edit in a New Tab

You can now open and edit jobs in new browser tabs while keeping your current view intact.

1. Go to the job overview, > *Jobs* > *Search*.
2. Right-click any job to see the new context menu.
3. Select *Edit in new tab* to open the job while keeping your current view.



This allows you to:

- Reference multiple jobs simultaneously
- Make changes without losing your place in the job list
- Compare job details across tabs

Visibility and Permissions Settings

Version 8.0 simplifies the administration of visibility settings and permissions for process data sheets. Previously, the visibility settings for tabs did not work as expected for *Creators* and *Assignees* when the permission to *Act as creator* was part of the assignee's user role.

Clear Authorization Control:

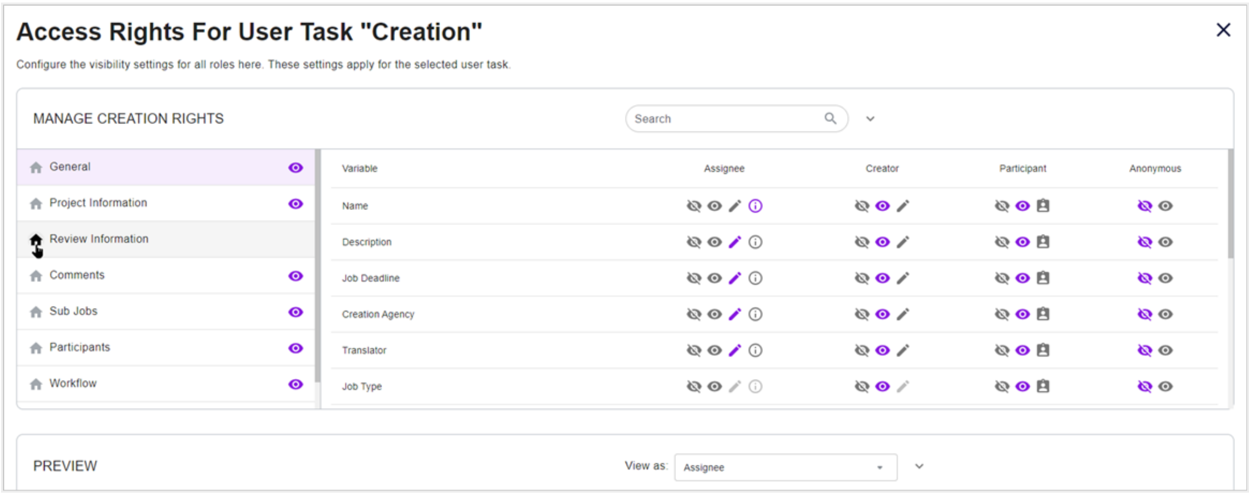
- The preview now directly shows what the data looks like for different roles allowing you to keep track of everything.
- All roles and their access rights are visible at a glance.

More Flexibility in Process Design:

- Simpler settings allow for better customization of processes. It's also easier to control data sharing.

Simplified Management of Tabs and Permissions:

- The administration has been grouped more clearly and is located under the new Access Rights button.



How it Works

1. Select a user task in Workflow Modeler or a classic workflow.
2. Click the *Access Rights* button for selected workflow or ACCESS RIGHTS for the selected user task.

   The *Access rights for...* screen opens.

   Note: The once familiar favorite star icon for the default tab has been replaced with a house icon.
3. Click the house icon for a tab under the *Manage Rights* section to set that tab as the default when users open the data sheet.

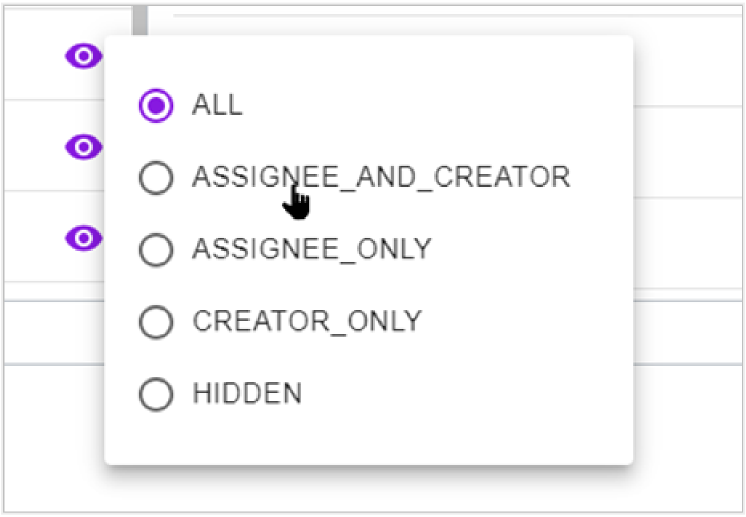
A black house icon clearly indicates which tab of a process is displayed by default.

- If a tab is set as default, it can no longer be hidden
- If a formerly invisible tab becomes the default, it will automatically become visible

This gives administrators a better overview when defining default views.

Set Job Tabs to Be Visible to Creators Only

Creator and assignees can now have separate access rights on the tabs. The visibility of the tabs for individual user groups is still set by clicking on the eye icon. A menu will open with five options. The preview area then shows directly what data is displayed for the selected role.



The revised visibility settings make it easier to adapt and tailor processes. The goal is to configure tab visibility separately for assignees and creators. Tabs should be visible to creators but hidden from assignees. The new *CREATOR_ONLY* option now hides the tab from assignees with the permission Act *Like Creator*.

Deeplink Access to Jobs

You can now directly access jobs through deeplinks in all contexts. This allows easier sharing of job links with team members. We improved navigation efficiency which makes it easier to work with multiple jobs across browser tabs.

New Features

Before the deeplink was hidden under the ... menu in a opened job data sheet. You can now access deeplinks to jobs in all contexts:

- Open jobs in new tabs or windows using right-click options
- See job-specific URLs in your browser's address bar

Improvements

Action	Result
Open a job	The URL updates to show the specific job deeplink

Action	Result
Create a job	The URL updates to show the new job's deeplink
Close a job	The URL updates to show the job overview screen

Substring Search in Select Variables

This release introduces a new feature that allows substring search in single and multi-select variables in the job datasheet. You can now type a partial string in the search field, and the results will display all options that contain the specified substring within their display name.

This enhancement improves the user experience by providing more flexible and intuitive search capabilities within select variables, making it easier to find and select the desired options regardless of their position within the display name.

Previous Behavior

Previously, the search functionality in select variables only matched options whose display names started with the typed string. For example, if you typed *monitor* in a product category multi-select variable, it would only show results like *Monitor Stand* or *Monitor Cable*, but not *LCD Monitors* or *4K Gaming Monitors*.

New Improved Behavior

1. Open a job datasheet containing single or multi-select variables.
2. Type a substring , e.g. *pass*, in the search field of a select variable.

The results will display all options with *pass* appearing anywhere in their display name, such as *Passenger Information* or *Bypass Validation*.

This behavior also applies to complex cases such as an advanced grid containing a multi-select variable.

WYSIWYG Editor Update

With this update, the integrated rich text editor has been revised and expanded with many useful functions. The user can work more comfortably and intuitively with formatting options such as fonts, font sizes, and formatting. The editor for discussions has been also upgraded to provide a more engaging and intuitive platform for communication.

The user experience has been improved with new tools such as font and font size selection. This makes it even easier for users to create and format text. The rich text editor now offers better text formatting options:

- Choose different fonts and font sizes
- Apply text formatting like bold, italic, and lists
- Use an expanded toolbar for common formatting tasks

Performance and Security

- Faster response when using multiple editor variables in data sheet layouts
- Security updates included
- Several bug fixes implemented
- Faster loading times in datasheet layouts

Technical Details

- Fewer background requests when working with editor variables in data sheet layouts
- The updated variable editor works seamlessly with the main editor

Customizing Column Widths in Comfort Grid

You can customize the width of individual columns in the *Comfort Grid* variable of a data sheet in order to create a more effective data display. This feature allows you to set specific widths for each column based on your data display requirements when designing the data sheet layout.

Available Width Options

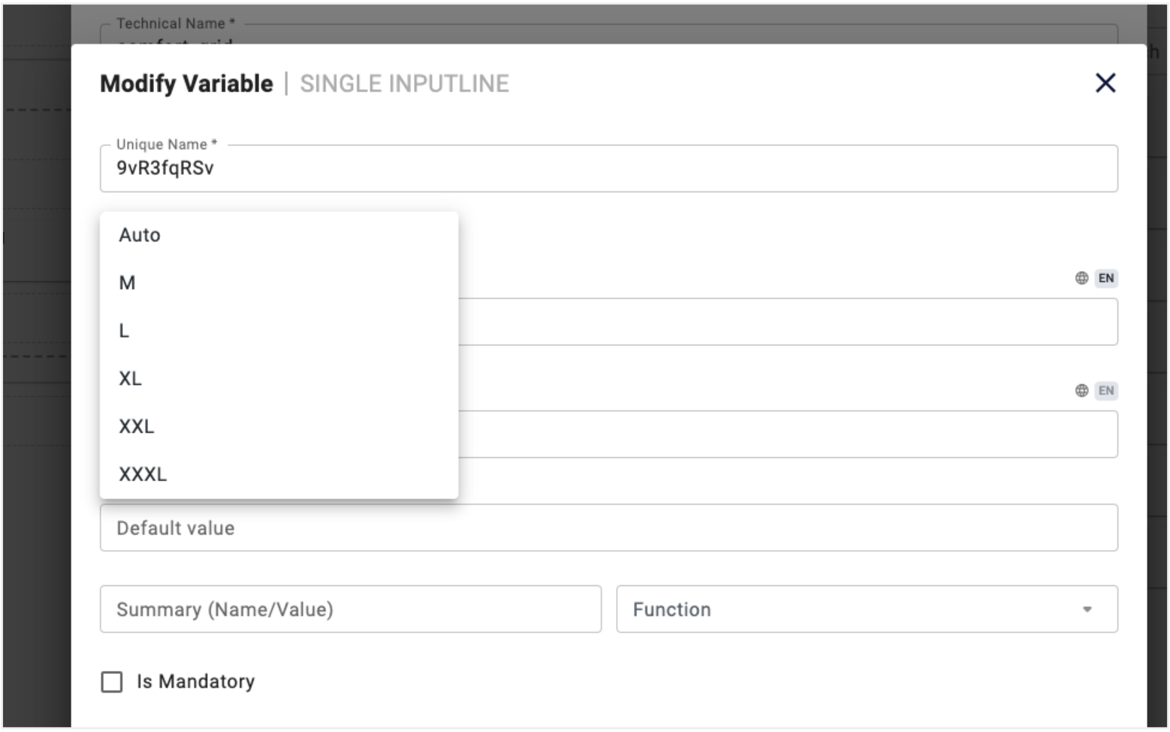
You can set the following predefined widths for each column:

- S - 50 px
- M - 100 px
- L - 150 px
- XL - 200 px
- XXL - 400 px
- XXXL - 600 px

If you don't specify a width, the column uses the default width based on its content.

How to Set Column Widths

1. Go to *Administration* > *Overview* > *Datasheet Engine* > *Types* to configure an existing type or create a one.
2. Select the the *Comfort Grid* variable for your column.
3. In the configuration dialog:
    a. Enter a *Technical Name* for the column.
    b. Enter a Unique Name.
4. Select the desired width from the dropdown list.



5. Enter any additional required configuration values.
6. Click *Save* to apply the changes to the job type.

The configured width remains fixed when users interact with or resize the grid.

Manage Job Participants Via API

Previously, only internal API endpoints could be used to manage job participants, which limited external automation and integration.

The new API endpoints let developers manage job participants. They can add, remove, and list participants using secure requests. Adding participant management to existing workflows makes job administration more efficient.

Access to these endpoints lets developers automate and tailor workflows based on their needs. This streamlines collaboration and user experience. This facilitates the work of budget coordinators and users who require joint access to jobs, as it unifies coordination and communication processes.

By making this API available to external users, we aim to boost productivity and interoperability.

HTTP Method	Endpoint	Description
GET	`/dse/rest/v1/dse-object/{instanceId}/{l10nLocaleId}/participants`	Retrieve list of participants for a job
PATCH	`/dse/rest/v1/dse-object/{instanceId}/{l10nLocaleId}/participants`	Add new participants to a job (without replacing existing ones)
PUT	`/dse/rest/v1/dse-object/{instanceId}/{l10nLocaleId}/participants`	Add new participants to a job (replacing existing ones)
DELETE	`/dse/rest/v1/dse-object/{instanceId}/{l10nLocaleId}/participants/{userUUID}`	Remove a specific participant from a job

Note

- `{instanceId}` represents the ID of the job instance.
- `{l10nLocaleId}` is the localization ID (always "0" for jobs).
- `{userUUID}` is the UUID of the participant to be removed.

These endpoints allow for retrieving, adding, updating, and removing job participants via the external API.

JavaScript Extension Management

JavaScript code can now be injected by Administrators in two ways:

Datasheet Injection

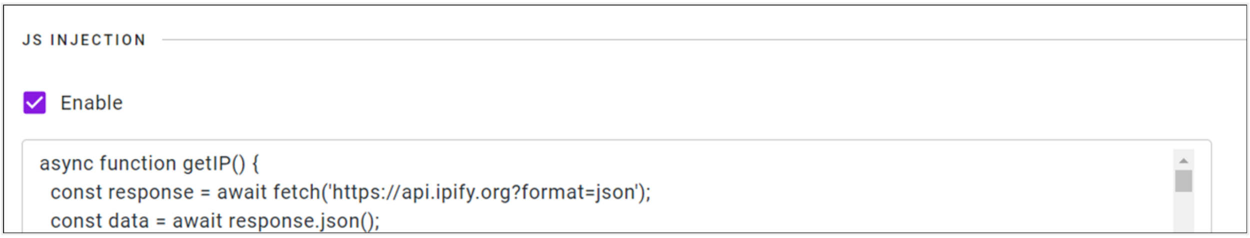
1. Add JavaScript code in the *JS Injection* field when you:
   a. Create a new job type
   b. Customize an existing job type

The system executes this code only when opening a job of the configured type.

Global Script Injection

To add JavaScript code that runs whenever the job overview loads:

1. Go to > *Administration* > *Overview* > *Other Settings* > *Other Settings*
2. Locate the *JS Injection* field and click the *Enable* checkbox.
3. Enter your JavaScript code.
4. Save your changes.



The system executes this code when users navigate to > *Jobs* > *Search* or otherwise load the job overview.

Benefits

- Improved stability through standardized implementation
- Automatic compatibility with product updates
- Simplified maintenance with centralized code management
- Better visibility of implemented extensions

Notes

This release still maintains backward compatibility with existing description variable implementations, but this will be deprecated soon. Use only documented APIs and product features. Reference our official API documentation.

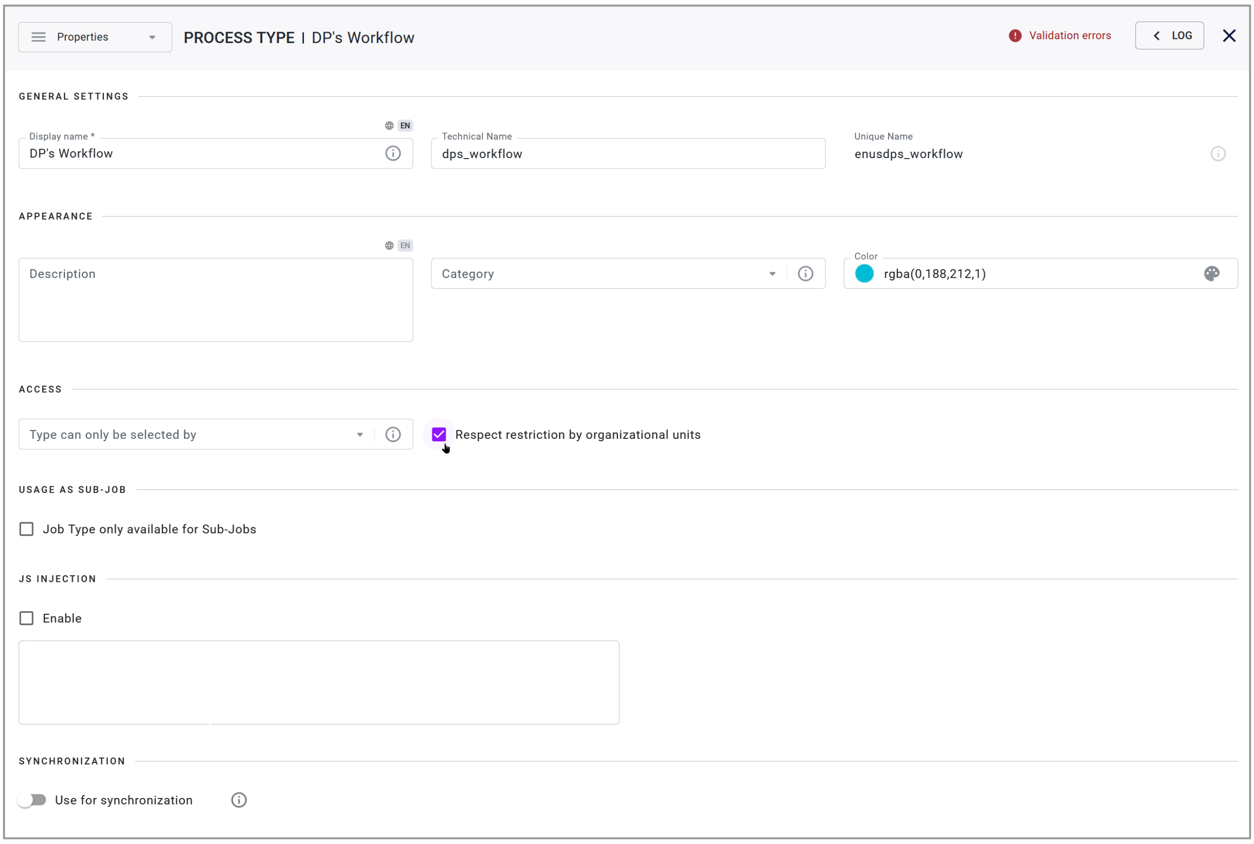
Type Configuration UX Improvements

You can now configure job types more efficiently with our redesigned *Properties* screen. We've reorganized and improved several key areas:

- *Other Settings* section with clearer labels and grouping
- Improved layout

- Type *Properties* with logical grouping of related settings
- Sub-Jobs section improvements (see Flexible Creation of Sub-Jobs in BPMN Workflows)

The data sheet layout has logically grouped settings that belong together. Subheadings highlight each section.



General Settings

You can configure the following basic properties for your job or process type:

Field Name	Description	Example
Display Name	The name shown to users in the interface	DP's Workflow
Technical Name	The system identifier for the process type	dps_workflow
Unique Name	An automatically generated unique identifier	enusdps_work-flow

Note

The language selector (EN) lets you provide translations for display name and description.

Appearance

Configure how the process type appears in the interface:

Field Name	Description	Example
Description	Add details about the type's purpose and usage	DP Summer Campaign for Social Media
Category	Select a category to group related types	Social Media 2025
Color	Choose a color for better visual identification	rgb(0,188,212,1

Access

Control who can use this process type:

- *Type can only be selected by*:
    - Define which user roles can select this process type
- *Respect restriction by organizational units*:
    - Enable to enforce organizational unit access rules

Usage as Sub-Job

Configure how this process type behaves in sub-jobs:

- *Inheritance*:
    - Set to *No inheritance* to prevent property inheritance from parent jobs
- *Job Type only available for Sub-Jobs*:
    - Tick checkbox to restrict this type to sub-jobs only

JS Injection

Add custom JavaScript code:

- *Enable*: Activate JavaScript injection for this process type
- Enter your JavaScript code

Synchronization

- *Use for synchronization*: Enable to include this process type in synchronization processes

Actions

Using the buttons at the top of the screen, you can:

- Check for configuration errors
- Publish your changes:
  - Click *Publish changes*
- View the change log:
  - Click *Log*
- Close the configuration screen

Job Manager Discontinuations

No Participant Status in Completed Workflow User Task

Previously former assignees lost participant status upon task completion, limiting their access to previously handled jobs. This functionality has been changed in version 8.0 to improve workflow visibility and user experience. User task assignees now retain participant status after completing their tasks, ensuring continued access to previously handled jobs. You cannot revert to the old behavior. See Former Assignees Automatically Added as Participants to Jobs.

Job Type Unique Name Editing

Effective version 8.0 you can no longer edit the unique name for job types.

Previously, you could:

- Edit the unique name of job types
- Not edit the technical name of job types

Changes

- The technical name now serves as the primary reference for job types
- You can edit technical names at any time
- The API now references job types using their technical names

API Impact

The API endpoint for accessing job types now uses the technical name

Removed Permissions

With version 8.0, permissions have been consolidated. Instead of multiple permissions, only two are now required.

The following legacy entries have been removed:

- *MANAGE_DEFAULT_TYPES*
- *MANAGE_OBJECT_NUMBERS*
- *MANAGE_TYPE_CATEGORIES*
- *MANAGE_TYPES*
- *MANAGE_TYPE_CONFIGURATION*
- *MANAGE_VARIABLE_ACCESS_AND_RIGHTS*
- *MANAGE_DATASHEET_LAYOUT*
- *PUBLISH_DSE_CHANGES*

Simplified Permissions

The following two permissions take over the functions of the removed permissions. They can be assigned to an administrator role.

- *Manage Jobs*
- *Manage Products*

To administer the *Data Hub* module, you need an administrator role with these two permissions enabled.

> Note
>
> The following previously used entries are still visible and selectable under > *Permissions* when editing a role, but their assignment to the role has no functional significance:
>
> - *Consume JMS Messages*
> - *Show Blueprint Jobs*

SOAP Interface for Job Manager and Marketing Data Hub

The SOAP interface for Job Manager and Marketing Data Hub has been removed. This interface was previously replaced by the REST API in versions 7.3 and 7.4.

Required Action

If you were using the SOAP interface, you must migrate your integrations to use the REST API.

You can find detailed information about:

- REST API endpoints and authentication
- Code examples

in our API documentation.

> Note
>
> Need help with the migration? Contact our Support team through your usual support channel.

Job Manager MMS Customizations

The ability to inject code before the system build process in Job Manager has been removed to improve system stability and security.

Alternative

You can now add custom JavaScript code through the Job Administration interface. This provides a more secure and maintainable way to customize job processing.

Required Actions

If you use code injections in Job Manager, you need to:

- Export your existing code injections
- Move your customizations to the new *JS inject* field in DSE administration to run on the search page or individually in a job type on the data sheet.

Custom Rich Text Editor Configurations for Variables

Previously, it was possible to create custom Rich Text Editor configurations, including the ability to import InDesign styles, for use with Job Manager and Data Hub variables. As of version 8.0, these configurations are no longer usable with datasheet variables. As part of upgrading the Job Manager Rich Text Editor, we have replaced the previous custom configurations with a set of new configuration presets. When configuring a Rich Text Editor field on a Job Manager variable, you can now choose between the *Minimal*, *Standard*, and *Full* presets instead of having to set up custom configurations.

Task Manager in Jobs

The *Task Manager* functionality has been removed from the product. This change streamlines our system, focuses resources on actively used features, and paves the way for a new standalone task management solution in the near future.

Resources

The *Resources* sub-module has been removed from the *Jobs* module. This change eliminates the calendar-based task management and resource allocation features.

'Only Briefing' Job Type

The job type *Only Briefing* has been discontinued and is no longer available in the list of job types when configuring a job.

Assets

A modernized import system removes asset editing limits. We are introducing role-based attribute management and CLDR language support for improved multilingual capabilities. Handle gigabyte-sized video files with enhanced efficiency through optimized scanning protocols and refined upload mechanisms that deliver faster processing times.

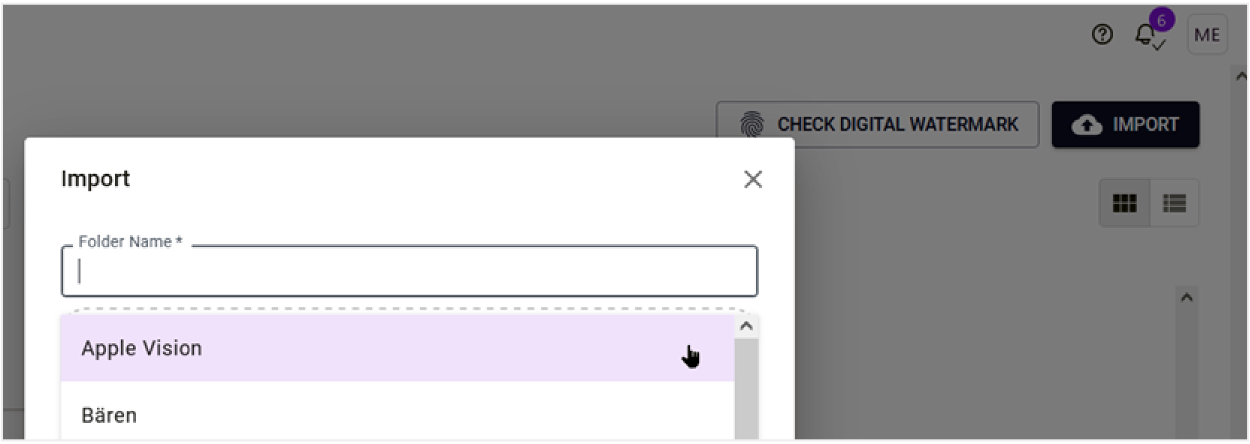
Import Feature Overhaul

The import functionality has been significantly redesigned in version 8.0 compared to previous versions to provide more flexibility and control over file uploads. Key improvements include:

New User Interface

Compared to previous versions, users can now drag and drop local files from their computer into the search results or the open import area to upload them.

- A new Import button in the upper right corner of the Import page opens the upload interface
- Drag-and-drop file upload is now supported in the search results and import areas
- Redesigned *Import* dialog with enhanced options



Flexible Folder Management

- Upload files to existing folders or create new ones
- Specify custom names for import folders (1-255 characters, alphanumeric and spaces only)
- Name cannot be changed once upload begins

Benefits

- Easier identification of assets after upload, as the folder has been given a meaningful name by the user
- Better organization and structuring of uploaded assets with the ability to name import folders
- Differentiate uploads by folder name for faster retrieval and sorting

Rules and Restrictions

- The import name is a mandatory field and must not be empty
- The name is limited to 255 characters
- Once the upload has started, the folder name can no longer be changed

Improved Workflow

- The *To Import* button provides direct access to your newly imported files
- The new *Close* button allows cancelling the import process

Additional Enhancements

- You can view all files you're responsible for, independent of import folders
- Import speeds have increased through performance optimization of all import actions

These changes provide a better, user-friendly import process with faster access to uploaded content. The new flexibility in folder management and direct file access should significantly improve productivity when working with imports.

> Note
>
> Drag-and-drop upload is disabled when your role lacks upload permissions or when a dialog is open in the search results.

Better Upload Performance for Large Video Files

This release improves the Media Pool file upload service, especially for large video files.

File Upload Service Improvements

We have optimized the process for uploading large video files (1GB+), by reducing the time spent in the *virus check* stage on all versions from 7.3.1 and later.

We adjusted virus scanning settings to better handle large files, improving overall upload efficiency.

Upload Issues Resolved

We fixed an issue where files larger than 1GB couldn't upload correctly. Such files are now processed without errors.

Clearer user response has been added to the user interface during the upload process. Users will now receive a more visible and descriptive response within the interface when a large file upload is successful. This addresses previous pain points where users were uncertain about the status of their upload, especially for slower or longer-running file transfers.

Compared to previous versions, users will notice a reduced time required for the *virus check* phase, resulting in faster and more reliable uploads.

Asset Editing Limit Removed

This release removes the limit on the number of assets that can be edited in a single session. Previously, editing was limited to a maximum of 200 assets per session. Now you can edit an unlimited number of assets at the same time. This change will make life easier for editors and content creators who need to create and edit a large number of assets. They will be able to work without intermediate steps.

It should be noted, however, that editing a large number of assets at once can also mean that saving changes takes longer than usual.

Switch to CLDR Language Codes

The Media Pool system is undergoing a significant upgrade in its language handling capabilities. All data that previously utilized 2-letter language codes will be migrated to CLDR (Common Locale Data Repository) language codes, enabling the use of modern Unicode standards. This transition includes comprehensive updates to both the APIs and user interface to accommodate and display the new CLDR codes. For users upgrading from previous versions, existing 2-letter codes will be automatically mapped to their CLDR equivalents by default.

Benefits

The implementation of modern Unicode standards for language codes ensures better multilingual standardization and simplification. Our architecture becomes future-proof through CLDR adoption, making it easier to add new languages as needed. Additionally, this change will significantly reduce the maintenance effort required for multilingual functionality in future versions.

Implementation Changes

Version 8.0 will no longer use or display the former 2-letter language codes. Any existing codes that previously employed the 2-letter format will be automatically adjusted. However, it's crucial to note that before proceeding with the upgrade, users must verify the default assignment of language codes and make any necessary adjustments to ensure proper functionality.

User Based Edit Template

Currently, asset types and their attributes are managed individually for each asset. This means that visibility and edit permissions for attributes are defined at the asset level, which we call the asset-based approach.
We're introducing an additional option for managing asset types, complementing our existing asset-based approach with a new user role-based control system. This enhancement provides enterprise customers with flexibility in choosing how they want to manage attribute visibility and editability.

Why This New Option

- Enterprise customers requested more efficient permission management
- The current asset-based approach became complex to maintain in large organizations
- Organizations need more consistent control over asset attribute access

For Administrators

When switching from decentralized asset types to per asset to user role-based control, you can configure attribute permissions based on user roles:

- Set which roles can view each attribute
- Define which roles can edit each attribute

This allows for more precise control over what users can see and modify.

For Users

The system automatically adjusts the interface:

- When viewing assets, you'll only see attributes configured for your role
- The edit dialog shows only the attributes you have permission to modify, providing a more consistent user experience

Core Architecture

- New optional user role-based system is available for enterprises requiring this approach
- Asset types can now also be associated to user roles and no longer only to assets
- Asset types maintain their current general behavior
- Assets no longer store asset types in a fixed manner

Asset Editing Process

- Users can edit assets based on their viewing and editing permissions
- Edit dialog interface is dynamically loaded based on:
    - User's role
    - Associated Asset Type permissions
    - User's access level

Benefits

- Granular control over asset management
- Simplified permission management through role-based access
- Improved scalability for large organizations and enhanced enterprise rediness

Attention: Irreversible Change

The configuration can not be reverted once you have migrated to the new role-based concept and replaced the previous asset-based approach.

Note

Contact Uptempo, if you plan to make the change to the new user-focused option on how asset types can be managed. This is a hidden setting and requires our assistance.

Miscellaneous Changes

Feature	Description
Asset Removal Warning	There is a new confirmation dialog that appears when users attempt to remove assets from their own collection. This prevents other users from unintentionally losing access to an asset in a job or review if the original uploader removes it. The dialog informs users that removing the asset may affect other users and that they must explicitly confirm before the asset is actually removed.
Complex Search Queries	When more than ten items are selected in search fields such as text search, categories, file type/extensions, or tags, the extra items are now truncated to "...". Previously, only the first ten items were fully displayed, and other items were missing. This was confusing to the user because the full selection was nowhere to be seen. The ellipsis ... lets users know that the selection is larger than the ten items displayed. This lets users know that they may need to narrow their search criteria to get better results. At the same time, users can see that all selected search criteria are being considered, not just the visible entries. Hovering over ... displays all items in a tooltip.
Show File Type in List View	This little feature is useful for those of you who do not use the *Gallery view*, but prefer to see the search results in *List view*. In *List view*, the file type is now also indicated by a coloured marker in front of the asset name.

SOAP Discontinuation	The SOAP interface has been retired with version 8.0. The REST interface completely replaces the old SOAP interface. If you are still using the SOAP interface, you should switch to the REST API as soon as possible before upgrading. By standardizing on REST, developers only need to focus on one interface technology. This makes it easier to develop custom solutions for the platform. REST is the more modern and widely used technology for API calls. Focusing on REST instead of SOAP ensures the continued development and long-term support of the interfaces
Removed Permission	The old permission *EDIT_CMS_CONTENT* has been removed from version 8.0 and is no longer available.

Marketing Planner

Experience more productivity with parallel exports that enable continuous work while processing large tree structures in the background. Enhanced budget calculations now flexibly handle nested activities, while refined filtering combines rapid searches with advanced multi-criteria sorting, complemented by custom menu personalization based on user roles.

New Sorting and Filtering

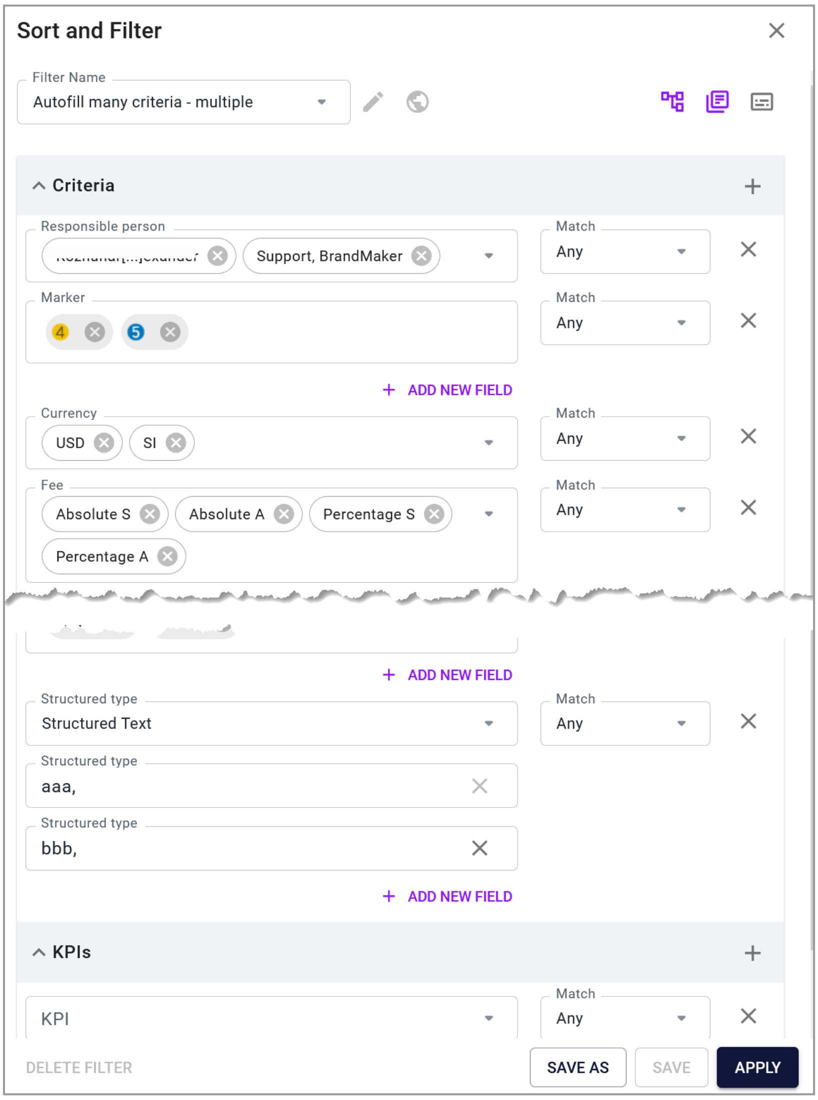
The new *Sort and Filter* functionality introduces a more powerful, intuitive interface that helps you find and organize your data more efficiently. This update includes a modernized design, improved performance, and advanced filtering capabilities to support both casual and power users.

New Interface

Click the filter icon in the toolbar. You can now choose between two filtering interfaces based on your needs:

- Basic Filter View : A streamlined interface with simple toggles and dropdown menus for straightforward filtering
- Advanced Filter View : A comprehensive interface supporting complex filter logic and multiple criteria combinations

We recommend exploring both the basic and advanced views to determine which best suits your workflow.



Filtering Capabilities

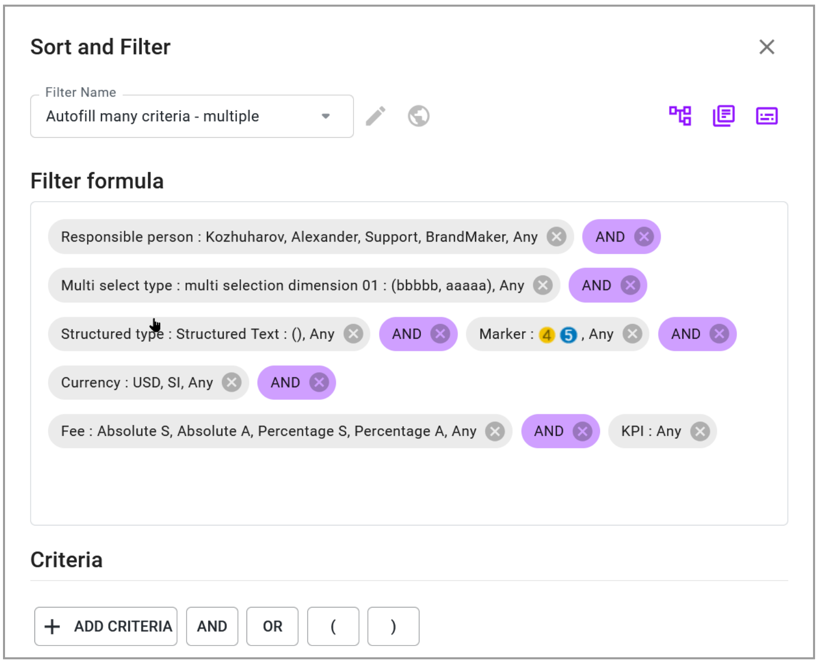
You can now create more precise filters with new matching criteria:

- All
- Any
- None
- Empty
- Not empty

The Planner now supports complex filter rules, allowing you to:

- Combine multiple conditions using AND/OR operators
- Filter by timeline presence and year
- Search for elements with attachments
- Filter by task status and KPI values
- Include subelements in your filtered results

These new filter options provide greater flexibility while maintaining ease of use for all experience levels.



Performance and Usability

We have enhanced search speed and accuracy through Elasticsearch integration, optimized usability with a modern, intuitive interface design, streamlined navigation and controls, and optimized the handling of large data sets to enhance performance and usability.

Good to Know

Filter groups display up to 500 elements for optimal performance. You'll see a notification when this limit is reached. All elements are included when exporting the complete calendar/budget view/tree. Existing sort and filter configurations will be automatically migrated to the new system.

Copy & Paste Element Sequence

When you copy and paste multiple elements or folders, the system now always maintains their original sequence. This ensures your content stays organized exactly as you intended.

Why This Matters

- Keeps your content structure intact
- Saves time by avoiding manual reordering
- Makes copying and pasting multi-selections reliable again

How It Works

The system handles two types of copy-paste operations differently:

Multiple Selected Elements

When you select and copy several individual elements:

- All selected elements are copied
- When pasted, they appear in their original order
- The hierarchy and relationships between elements are preserved

Complete Folders

When you copy an entire folder:

- The folder and all its contents are copied as one unit
- When pasted, all elements maintain their original structure and sequence
- The complete hierarchy is preserved

Custom Menu Read Permissions

Previously, custom menu extensions were only visible to users with write permissions (MAPS_ ELEMENT_WRITE) for an element. The system now displays these menu extensions to users with read permissions, making the functionality more accessible while maintaining security.

Prerequisites

You can now access custom menu extensions when you have: Read permissions for the element. No write permissions are required.

Menu Visibility

The system automatically:

- Checks your permissions when you access an element
- Displays relevant menu extensions based on your read permissions
- Maintains security by verifying permissions before displaying any menu options

Permission Check Process

- When a user accesses an element the system verifies read permissions
- If read permissions exist:
  - Applicable menu extensions are visible
  - Access to associated functionality is enabled
- If read permissions do not exist:
  - Menu extensions are hidden
  - Access to restricted functions is not possible

> Note
>
> This change affects all custom menu extensions. Extension services can override default behavior. Existing write permission checks remain available for custom implementation.

Configuration

No additional configuration is needed for basic read permission functionality.

Custom Configuration to maintain write-permission-only access:

- Access your extension service configuration
- Add permission validation logic
- Configure menu item visibility based on user permissions

Security

- All permission checks occur before displaying menu options
- Extension services can implement additional security measures

> Note
>
> In case you as an administrator need to restrict menu extensions to users with write permissions:
>
> - Configure the extension service to remove the extension menu item for users with only read rights.

Custom Menu User Cookie

Custom menus show different options to different users based on their role and permissions. For example, some users can see and use the extension*Manage Calendar* while others cannot. This feature ensures users only see the menu options they're allowed to use.

What's New

- The new cookie option keeps your data secure by showing menu options only to authorized users
- The interface is cleaner and more relevant for each user

How it Works

When you click to open a custom menu:

- The system checks who you are and which organization you belong to
- Based on this information, it shows you only the menu options you're allowed to see
- You can then safely access any of the displayed options

For example, if you're not authorized to manage calendars:

- You won't see the *Manage Calendar* entry
- This prevents accidental attempts to access restricted features
- Your menu stays focused on the tools you actually use

Configuration

To make this work, your system needs to track:

- Which menu you're trying to open
- Who you are and your login status
- Which organization you belong to

The system can get this information in two ways:

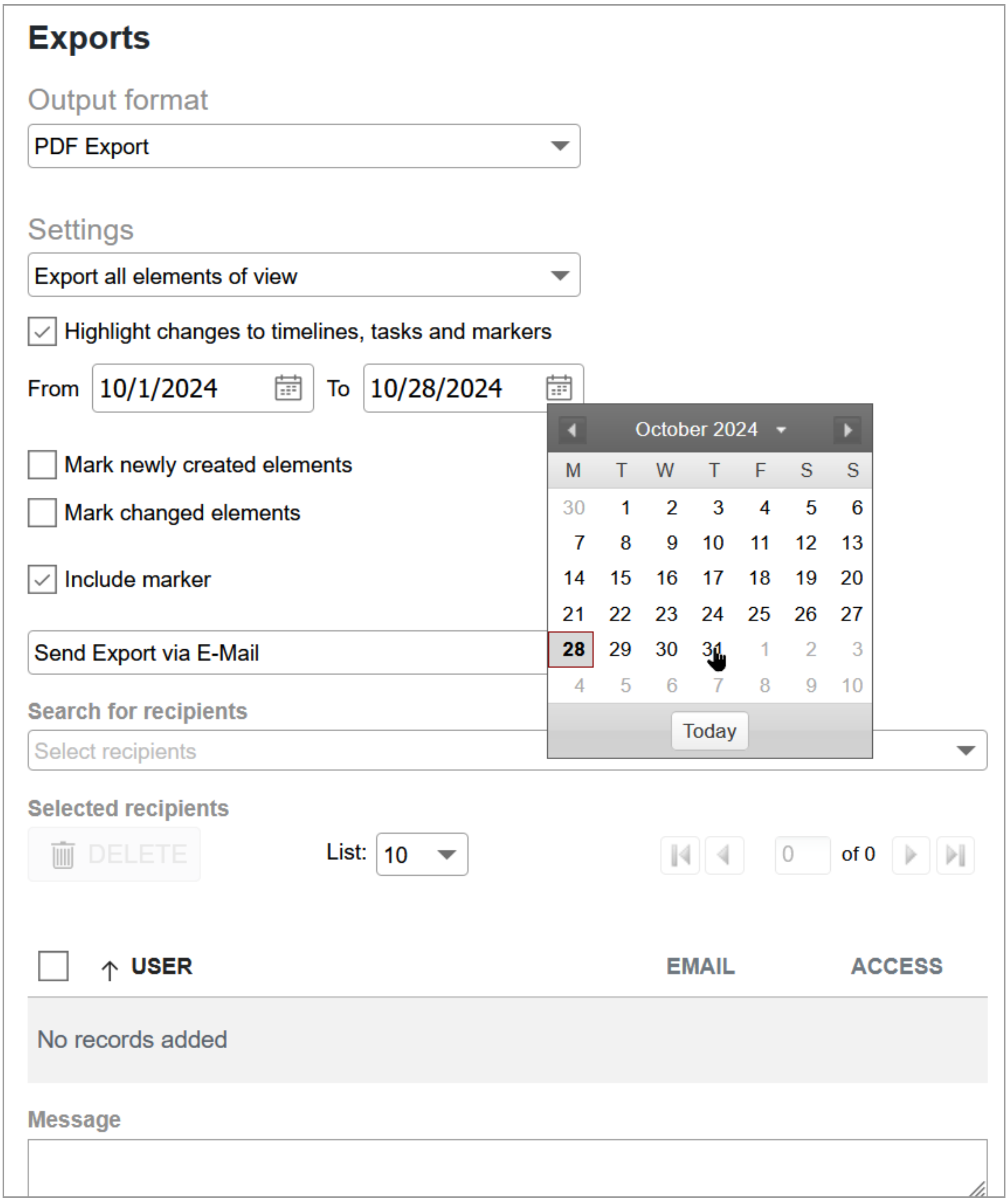
- Through your login session
- By checking your user ID directly

Parallel Export in Marketing Planner

Exporting an entire tree structure (with multiple subprojects or budgets) can be quite time-consuming. When you export calendar or budget data for a large tree structure, you can now continue working in Marketing Planner while the export is processed in the background.

Exporting Tree Data

1. Navigate to *Marketing Planner* > *Calendar*.
2. In the toolbar, click the Download-Icon for Export.



In the Export dialog:

3. Select PDF export as output format.
4. Select *Export all elements of view* as OUTPUT FORMAT.

5. Under *Settings*, select *Export all elements of view*.
6. Select *Send Export via E-Mail*.
7. Enter the recipient information.
8. Click *Export*.

Click × to close the panel and continue working in Marketing Planner while your export is being processed.

Budget Rollover Calculation

You can now include budget data from subelements in the budget rollover calculation. Previously, the rollover function only considered element-level budget data.

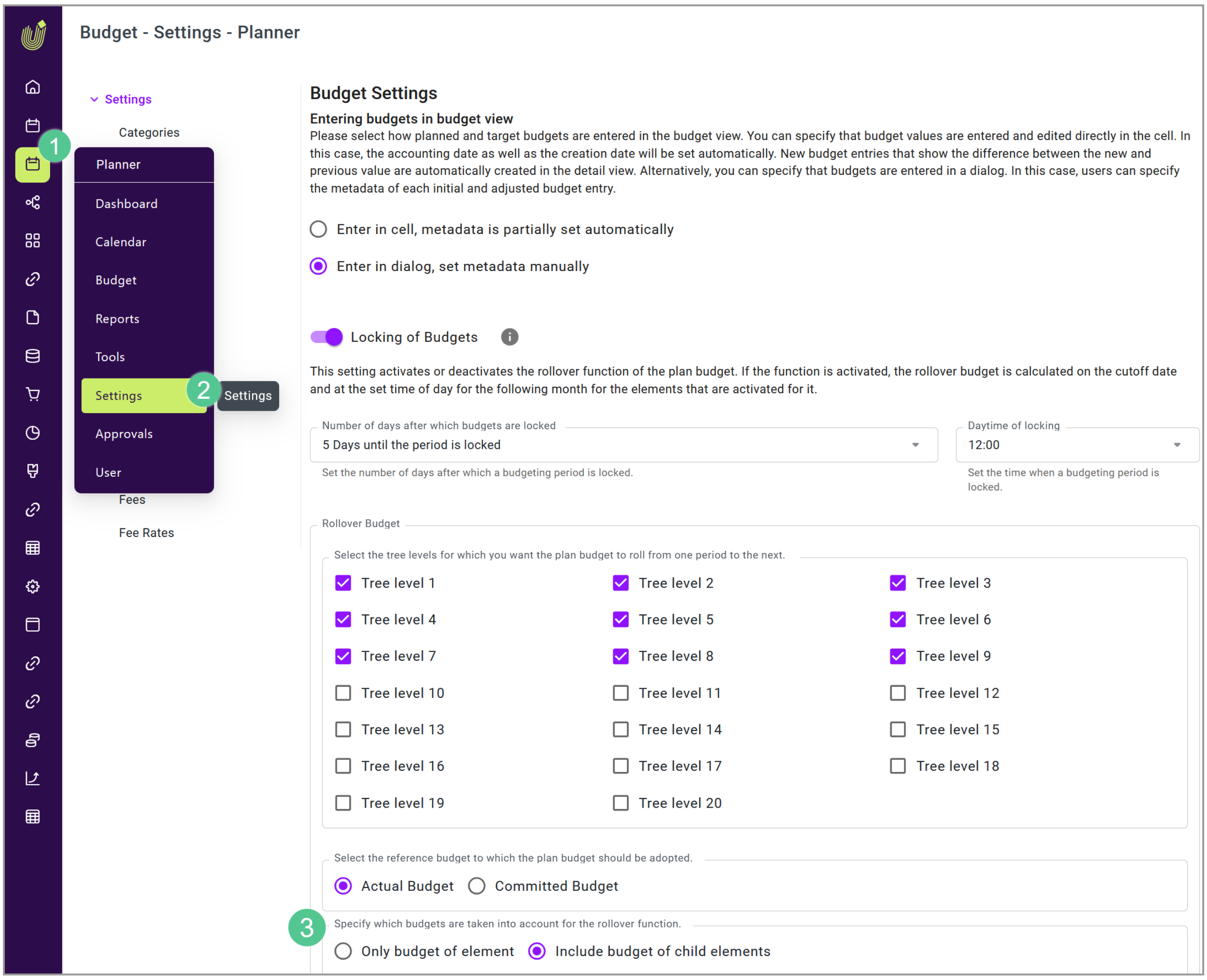
How It Works

When calculating budget rollovers, you can choose between two calculation methods:

- *Element Budget*: Uses only the direct budget data from the element
- *Include Budget of Subelements*: Includes budget data from all subelements in the calculation (default setting)

Setting Up Budget Rollover Calculation

1. Navigate to *Planner* > *Settings* > *Budget*.
2. In the *Rollover Budget* section, select your preferred calculation method:
    a. Select *Element Budget* to use only direct element budget data
    b. Select *Include Budget of Subelements* to include subelement budgets in calculations



Note

All elements must be based on the same currency. Any elements with a different currency to that of the parent element will not be included in the calculation.

EXAMPLE

Consider a marketing activity with the following structure:

- Trade Show (Parent Element)
- Booth Design (Subelement)
- Staff Travel (Subelement)
- Marketing Materials (Subelement)

When you select the rollover budget radio button:

- *Element Budget*, only the budget directly assigned to "Trade Show" rolls over
- *Include Budget of Subelements*, all combined budgets of Trade Show, Booth Design, Staff Travel, and Marketing Materials roll over

Impact on Existing Data

- Existing rollover calculations remain unchanged until you modify this setting
- The calculation method applies to all future budget rollovers once set

Bulk Data Processing APIs

Bulk Data Load APIs

New APIs were introduced for handling massive data operations efficiently. These API features are available for version 7.4 and 8.0.

What's New

- Batch processing capability for multiple records in a single request
- Optimized for large volume data operations
- Reduced system overhead compared to individual requests
- Enhanced performance for bulk data processing

Technical Benefits

- Improved scalability for large dataset operations
- Reduced server load through consolidated requests
- Better resource utilization for mass data operations

Bulk Dimension Update API

An API endpoint has been added for updating multiple dimensions simultaneously.

What's New

- Batch update capability for dimension values
- Single request handling for multiple dimension modifications
- Consistent update mechanism across dimension sets

Technical Benefits

- Streamlined bulk update process
- The number of API calls required for multiple updates has been reduced
- Improved data consistency in batch operations
- Enhanced Dimension Management

PATCH Method for Dimension Updates

A new PATCH endpoint for partial dimension update in element has been added.

What's New

- Support for partial updates using PATCH method
- Field-specific modification capability
- Selective update of dimension attributes

Technical Benefits

- Minimized data transfer for updates
- Optimized performance for partial modifications

- Reduced bandwidth usage
- Hierarchical Data Management

Extended Copy API

We enhanced the copying functionality with selective child element handling.

What's New

- Parameters for including/excluding specific children
- Customizable copying rules
- Selective hierarchy duplication

Technical Benefits

- Fine-grained control over copying operations
- Optimized copying process
- Reduced unnecessary data duplication

Data Retrieval APIs

Dimension Values API

New endpoint added for retrieving dimension values across subelements.

What's New

- Comprehensive dimension value retrieval
- Support for hierarchical data structures
- Efficient bulk data access

Technical Benefits

- Streamlined data extraction process
- Improved integration capabilities
- Enhanced data accessibility

Task Retrieval API

New endpoint added for accessing task data across subelements.

What's New

- Complete task data retrieval
- Support for multi-level task hierarchies
- Comprehensive task information access

Technical Benefits

- Efficient task data extraction
- Enhanced integration options
- Simplified task management

Deep Element Retrieval API

New endpoint added for comprehensive element access.

What's New

- Deep hierarchical data retrieval
- Complete element information access
- Support for complex data structures

Technical Benefits

- Comprehensive data access
- Improved data visibility
- Enhanced system integration capabilities

All changes are listed here:

- OpenAPI Changelog Summary

Or refer to our API website.

API Changelog Summary for Planner

The most notable breaking changes in Version 8.0 are the deprecation of several group and user group management APIs. Our Administration API now centralizes all group and user management capabilities. The update also introduces new endpoints for view, node hierarchy, and cost management, while enhancing existing APIs with additional properties related to jobs, tasks, and UIDs. These features have also been merged into version 7.4.

Breaking Changes

- `POST /maps/rest/api/{version}/group` - deprecated API, added optional 'uid' request property and response property
- `DELETE /maps/rest/api/{version}/group/{id}` - deprecated API
- `PUT /maps/rest/api/{version}/group/{id}` - deprecated API, added optional 'uid' request property
- `POST /maps/rest/api/{version}/node/{nodeId}/copy/{parentId}` - deprecated API, added optional 'filteredIds' request property
- `GET /maps/rest/api/{version}/usergroups/all` - deprecated API
- `GET /maps/rest/api/{version}/usergroups/user/{userId}` - deprecated API
- `PUT /maps/rest/api/{version}/usergroups/user/{userId}` - deprecated API
- `GET /maps/rest/api/{version}/node-type/icons/download/{typeId}` - changed response body type from object to string

New Endpoints

- `GET /maps/rest/api/{version}/dimension/node-allchildren/{nodeId}`
- `PATCH /maps/rest/api/{version}/dimension/node/`
- `PUT /maps/rest/api/{version}/dimension/node/{nodeId}`
- `PUT /maps/rest/api/{version}/group/assign/node/{nodeId}`
- `GET /maps/rest/api/{version}/node/allchildren/{nodeId}`
- `POST /maps/rest/api/{version}/node/{nodeId}/copy-extended/{parentId}`
- `POST /maps/rest/api/{version}/sunk-cost/split/{splitId}`

- `GET /maps/rest/api/{version}/task/node-allchildren/{nodeId}`
- `POST /maps/rest/api/{version}/view`
- `GET /maps/rest/api/{version}/view/all`
- `GET /maps/rest/api/{version}/view/lastused/user/{userId}`
- `GET /maps/rest/api/{version}/view/log/download/{viewId}`
- `DELETE /maps/rest/api/{version}/view/log/{viewId}`
- `GET /maps/rest/api/{version}/view/log/{viewId}`
- `DELETE /maps/rest/api/{version}/view/{viewId}`
- `GET /maps/rest/api/{version}/view/{viewId}`
- `PUT /maps/rest/api/{version}/view/{viewId}`

Updated Endpoints

- `GET /maps/rest/api/{version}/fee` - added optional 'query' request parameter
- `GET /maps/rest/api/{version}/dimension/node/{nodeId}` - added optional 'nodeId' property to response
- `GET /maps/rest/api/{version}/group` - added optional 'uid' property to items in response
- `GET /maps/rest/api/{version}/group/node/{nodeId}` - added optional 'uid' property to items in response
- `GET /maps/rest/api/{version}/group/{id}` - added optional 'uid' property to response
- `POST /maps/rest/api/{version}/managed-task` - added optional 'jobTypeId' property to response
- `GET /maps/rest/api/{version}/managed-task/job/{jobId}` - added optional 'jobTypeId' property to response
- `GET /maps/rest/api/{version}/task/changes` - added optional 'jobTypeId' property to modified items in response
- `GET /maps/rest/api/{version}/task/node/{nodeId}` - added optional 'jobTypeId' property to content items in response

- `POST /maps/rest/api/{version}/task/node/{nodeId}` - added optional 'jobTypeId' request and response property
- `GET /maps/rest/api/{version}/task/node/{nodeId}/status/{status}/date/{date}` - added optional 'jobTypeId' to content items in response
- `GET /maps/rest/api/{version}/task/user-assigned` - added optional 'jobTypeId' to content items in response
- `GET /maps/rest/api/{version}/task/{taskId}` - added optional 'jobTypeId' property to response
- `GET /maps/rest/api/{version}/view/public/all` - added several optional properties to items in response

Review Manager

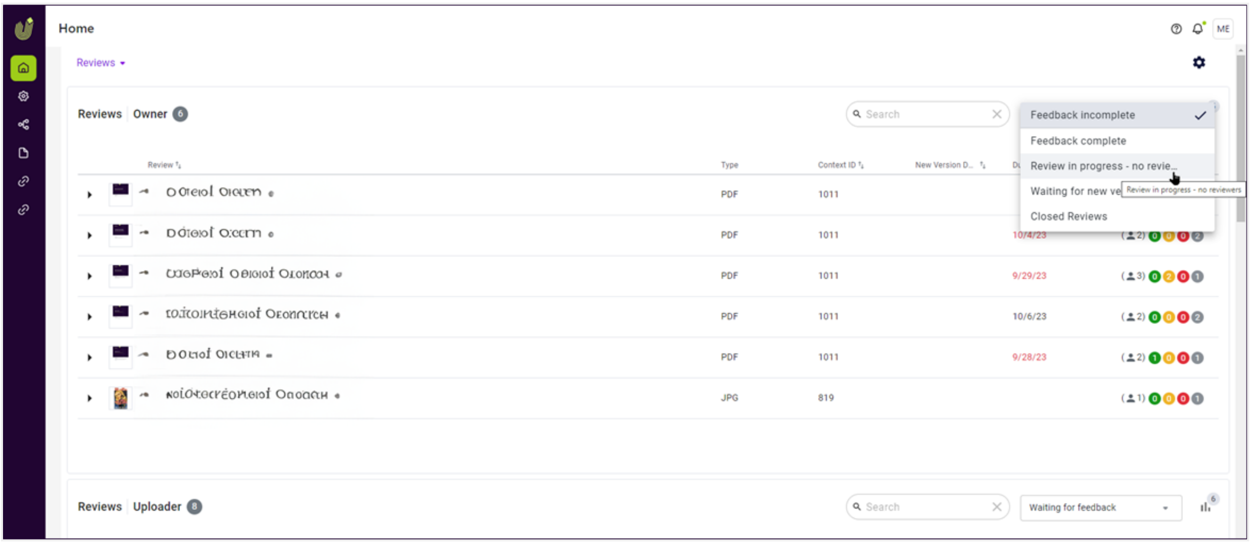
Transform your review workspace with customizable home widgets, flexible dashboards, and enhanced owner-focused controls that streamline collaborative workflows. The revamped interface introduces simultaneous multi-user invitations, expanded file attachments, full-screen mode capabilities, plus refined @mention features for efficient feedback management and comprehensive administrator oversight.

Flexible Home Widgets Replace Start Page

The *Home* module has undergone significant improvements, replacing the *Review Manager* overview page with flexible widgets. The previous Review Manager overview page had some limitations:

- Lack of search functionality and column sorting
- Confusing filter options and a single view for all users
- Default view tailored for owners, often resulting in empty pages for reviewers

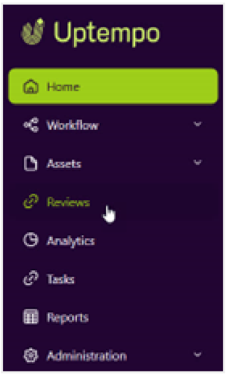
This version provides a more customizable and efficient way to manage reviews directly from the *Home* screen.



Key features and enhancements

- New *Review Manager* widgets in the *Home* module (See *Review Manager Widget* on the facing page)
- Configurable widgets tailored for reviewers, content creators, and owners

- Direct access to open reviews from the *Home* screen
- Search functionality and advanced filtering options (five preset filters available)
- Voting status and total review count displayed for selected filter
- Customizable sortable columns with drag-and-drop reordering and adjustable widths
- Option to show/hide specific columns
- *Review Manager* is still accessible as separate sidebar navigation entry if needed, although it will redirect you to *Home*.



- The new *Reject* option allows reviewers to reject a version without requesting changes, streamlining the review process

> Note
>
> *Review Manager* widgets must be added to a *Home* dashboard by an administrator. The flexible widget options in the *Home* module offer greater versatility compared to the previous static *Review Manager* homepage. It is possible to create multiple start pages for different personas. For example, you can create a dashboard that is accessible only to users with the*Reviewer* role and another that is accessible only to users with the *Owner* role.

Review Manager Widget

The widget provides a dedicated area for managing review tasks. You can find it under *Home* or if enabled via selecting *Reviews* in the sidebar navigation.

Key Features

- View all your active review to-dos in one place
- *All Reviews* filter, set as default view
- The default view shows all reviews you're involved in, regardless of your role
- Search and filter review tasks
- Managers can see an overview of team reviews and statuses
- Streamlined review management with *All Reviews* means no need to switch between filters
- Improved enterprise functionality: Administrators can use the *Review Manager* widget effectively

How It Works

- The default view displays all reviews for each user role (*Owner*, *Reviewer*, *Guest*, *Uploader*)
- Use search or select specific filters to narrow down the review list

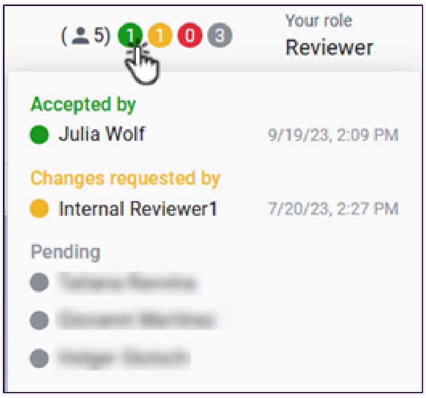
In previous versions, users could not easily search or filter for their review to-dos on the main overview page. The new *Review Manager* widget addresses this limitation by providing a focused view of review tasks.

This upgrade aims to improve efficiency in managing reviews and bring our review functionality in line with industry standards.

New Design of the Review Status Bar

The review status display has been revised. We introduce a new Votes overview design that shows all decisions at once. The owner now has a simplified experience, and the overall status and feedback display has been optimized.

For each status (*Pending*, *Accepted*, *Change requested*), a circle with the number of voters is displayed. The status bar has a hover effect.



When you hover over the status bar traffic lights, a popover appears, displaying a detailed list of all reviewers along with their decisions and associated dates. This feature lets you see all the feedback at a glance.

Owner-Centric Interface Updates

We've made several important improvements to the Review Manager to provide better clarity on roles, responsibilities, and review status. These updates will help you navigate the review process more efficiently.

Owner-Focused Review Header

- With version 8.0 the review *Owner* is now prominently displayed in the header, replacing the previous *Uploader* information
- This change highlights the key decision-maker and coordinator for each review
- You can now easily identify who to contact with questions or concerns about the review
- For reviews in *New Version Requested* status, you'll also see a *New version due until* date

Participant List

- The participant list now includes all key roles: *Reviewers*, *Owners*, *Uploaders* and *Guests*
- This gives you a complete overview of everyone involved in the review

Clearer Permission Icons

We've updated the icons and explanations in the participant list to better reflect user permissions:

VERSION PARTICIPANTS	1	2	3	4	Role
Lisa Lamb-Frompton lisa.lamb@legendarylures.com	✓		✓	✓	Owner (Creator)
Otto Mohl [redacted].com	✓	✓			Reviewer, Uploader of current version
Megan Easton nobody@uptempo.io	✓	✓			Reviewer
Adam Access-Denied Access-Denied@nopermissions.com	✓				Guest

- 1 The user can provide feedback on the review
- 2 The user can vote on the review
- 3 The user can request a new version
- 4 The user can approve and finish the review (Approve/Cancel)

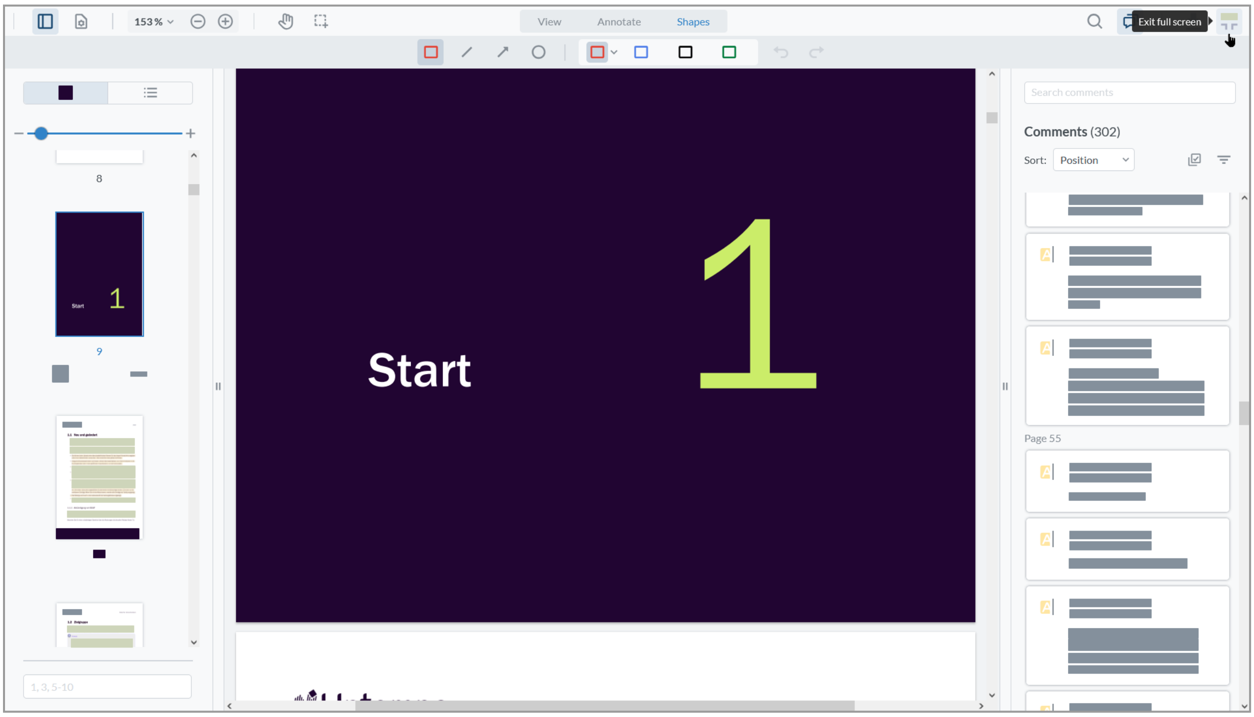
Streamlined Mentioning

- When you @mention an owner in a comment, they won't be automatically added as a reviewer
- This prevents confusion and duplicate notifications

These changes provide a more transparent and intuitive review process. You'll have a clearer understanding of who's leading each review, who's involved, and what actions they can take.

Full-Screen Mode

Version 8.0 introduces a full-screen feature in *Review Manager*, allowing you to focus entirely on the review process without distractions.



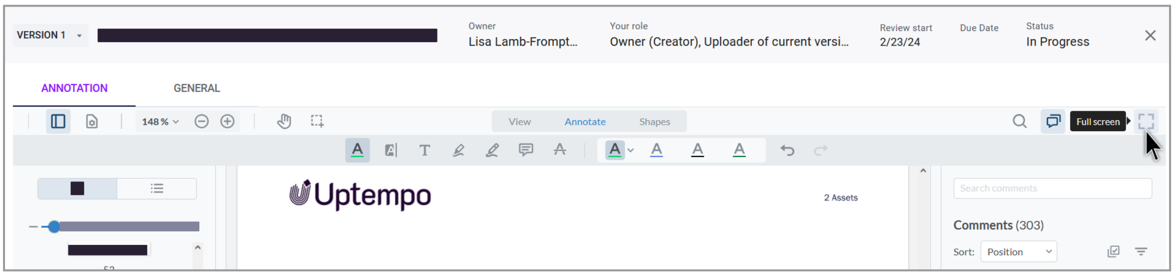
Why This Matters

- Maximizes usable screen space for review by hiding the header and footer
- Improves review experience on various screen sizes, especially laptops
- Enhances focus during remote work

How to Use Full-Screen Mode

1. To activate, click the new button in the upper-right corner of the review.

   The review enters full-screen mode, hiding non-essential elements and focusing on the content.



2. To exit full-screen mode, either:

- Click the button in the upper-right corner of the screen, or
- Press the ESC key.

This minor update can enhance the efficiency of your workflow in Review Manager by eliminating distractions and optimizing the use of screen space.

Enhanced File Attachment Capabilities

The latest version of the software offers users more capabilities to contextualize their comments with images, documents, or links, thus improving the exchange of information within the Review Manager and making the review process more efficient.The following enhancements significantly expand the options for adding context to comments in the review process:

Multiple Attachments per Comment

Previously, you were limited to uploading only one file per comment. You can now add multiple file attachments to a single comment, allowing you to provide more comprehensive supporting materials when giving feedback. Note: The maximum file size possible is 10 GB. Use shared links if you have larger attachments.

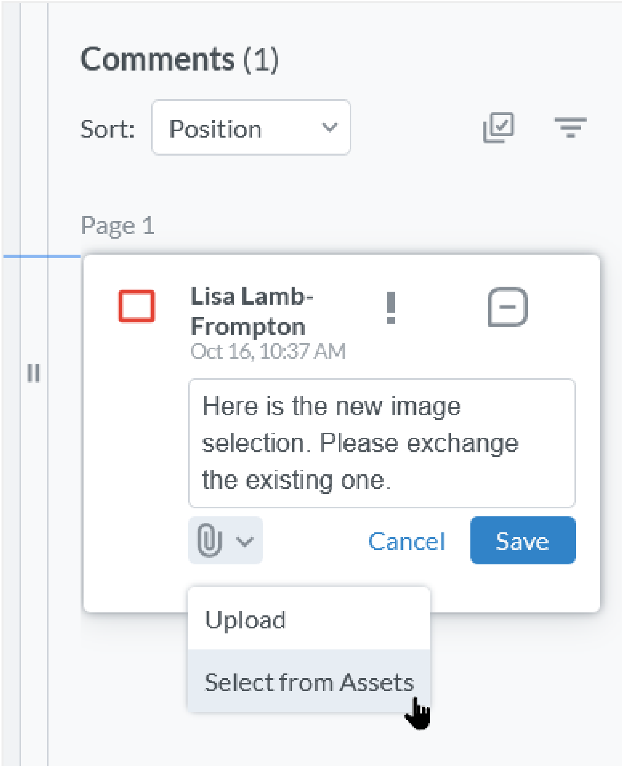
Attachments in Replies

Reviewers can add file attachments to replies on existing comments, enabling visual context within ongoing discussions.

Media Pool Integration

You can now select and attach assets directly from the Media Pool when adding comments, streamlining the use of existing materials.

Click *Select from Assets* in the paperclip menu.



Clickable Links in Comments

An embedded link makes it easy to integrate even large external documents. URLs entered in comments are now automatically formatted as clickable links. This allows easy referencing of external resources like SharePoint or other cloud storage platforms.

These improvements aim to facilitate more comprehensive and contextual communication within the Review Manager. By providing multiple options for attaching and referencing materials, both internal and external, users can more effectively convey information during the review process.

> **Note**
>
> The ability to add multiple attachments and integrate with the Media Pool is available from version 8.0 onwards. The clickable links feature has been merged back to earlier versions (7.3 and 7.4) to enhance usability across different releases.

Invite Multiple Users to a Review in One Step

Release 7.5 introduces a new feature that streamlines the process of inviting multiple contributors to a review. This enhancement significantly improves user experience and efficiency when setting up reviews.

Key Improvements

- Multi-select functionality

You can now select multiple users in the Users field and invite them in one step, replacing the previous method of inviting users individually.

Enhanced Search Functionality

- The search box displays results after typing just three letters
- You can use the checkboxes in the search results to select multiple users at once
- Users who are already participants don't appear in the search results

Simplified Role Assignment

The selected role is applied to all invited participants. Individual role assignment is not available in this view.

Enhanced @Mention Functionality and Direct Comment Access

We've improved the @mention feature in Review Manager 8.0 to make collaboration easier and more efficient.

Here's what's new:

Informative Email Notifications

- @mention emails now include the full comment text
- No more empty "message" sections in your notifications
- Quickly understand why you've been mentioned without opening the review

Direct Navigation to Comments

- The new "Show Annotation" button in email notifications takes you directly to the relevant comment
- Comments are highlighted for easy identification
- You save time by avoiding manual searches through long documents

Consistent User Experience

- This update aligns the Review Manager @mention experience with Job Manager
- Enjoy a familiar workflow across Uptempo Work Management tools

How It Works:

When someone @mentions you in a review comment, you'll receive an email with the full comment.

- Click the *Show Annotation* button in the email or in your system notifications under the bell icon.

  You'll be taken directly to the review with the relevant comment highlighted. Note: While the review doesn't directly jump to the exact page, clicking the highlighted comment will take you to the correct location in the document.

Now you can respond to an @mention efficiently without having to search for it in a multi-page document. This update streamlines communication and helps you focus on what matters most - addressing questions and moving reviews forward quickly.

Review Overview Widget for Administrators

We have enhanced the *Review Overview* widget to provide improved functionality for administrators. Users with the permission *Access All Reviews* can now configure and view a *Review Overview* widget showing all reviews in the system, even those they are not a participant in. This gives administrators a comprehensive view of review activity across the organization.

The widget configuration now includes an *Admin* persona option. Selecting this option enables users with the appropriate permissions to view all reviews.

Additional safeguards have been put in place to prevent widget misconfiguration, ensuring a consistent experience for all users.

These enhancements allow administrators to more effectively monitor and manage the review process across the entire system. Users without admin rights will continue to see only reviews they are participants in.

Access the View

1. Ensure you have the *Access All Reviews* permission assigned to your user account.
2. Add or edit a Review Overview widget.
3. In the configuration, select the *Admin* persona option.
4. Save the widget configuration.

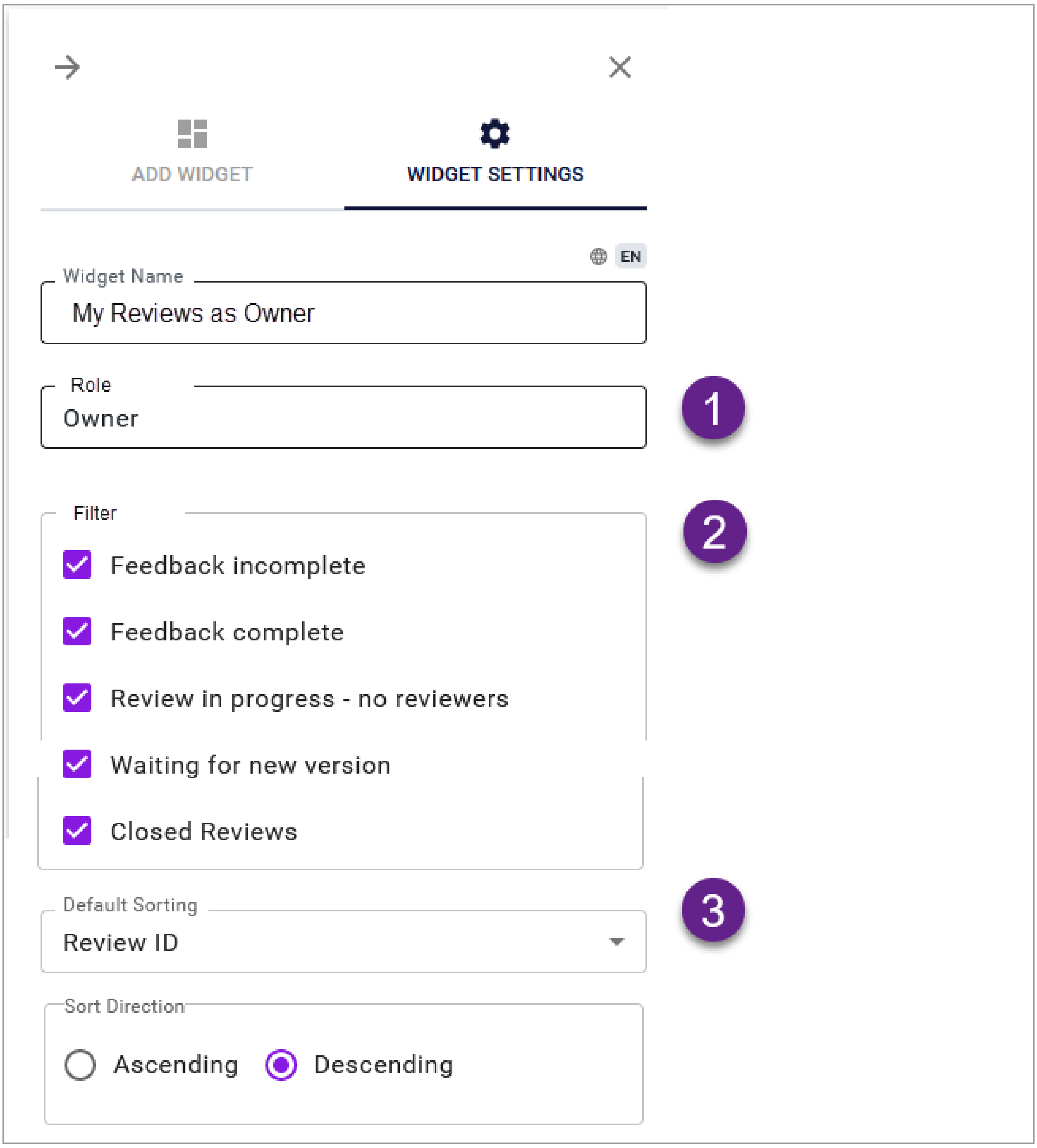
The widget will display all reviews in the system for you as an administrator. The standard filtering and search capabilities will also apply to this expanded view.

Improved Filter Configuration for Review Manager Widgets

We've updated the filter configuration process for widgets to improve clarity and prevent potential misconfiguration:

What's Changed

- Administrators now select a specific user role (*Owner*, *Reviewer*, *Guest*, *Uploader*, or *Admin*) before configuring filters for a *Review Manager* widget
- Only filters relevant to the selected role are displayed for configuration



Benefits

- Reducing confusion by eliminating duplicate filter names across roles
- Preventing accidental misconfiguration of filters for unintended roles

- Streamlined filter setup process for administrators

Previously, all filters for all roles were available simultaneously when configuring a widget. This could lead to a cluttered and potentially confusing interface.

With this update, administrators can more easily manage role-specific filters, ensuring users see only the relevant options for their access level.

Additional Enhancements and Changes

Feature	Description
Confirmation Dialog Added for *Approve Review*	Previously, you could unintentionally end a review without confirmation, especially when editing comments near the *Approve Review* button. But an approved review can not be reopened. This update addresses that issue. When you click *Approve Review* as an owner, a confirmation dialog appears. This new dialog: • Informs you that approving will close the entire review • Requires confirmation before closing the review • Prevents unintended review closures Until now, such a security prompt only existed for the *Cancel Review* button.
Extended Review Access Permissions for Administrators	The upgrade to version 8.0 introduces a new feature to extend review access permissions for selected administrator roles. The new *Access All Reviews* permission allows users to view all reviews in the system and open them in read-only mode, even if they are not invited as a participant. Previously, access was limited to only those reviews in which the user was an active participant. If an administrator also has the *Manage Participants* permission in their role, they can add other users or themselves to reviews with the *Access All Reviews* permission, allowing them to comment or vote. This enhancement provides the following benefits for administrators and support staff: • Easier testing of new features directly existing reviews • Faster troubleshooting of issues in reviews you're not involved in • Support customers in reviews, even if you are not invited to that particular review This also simplifies support and troubleshooting.

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Replacement of the SOAP Interface by REST API</td><td>This release completely replaces the discontinued and removed SOAP API with a modern REST API. This simplifies backend development and improves performance and maintainability. The software can only be accessed via REST. There are no functional limitations compared to SOAP. Moving to this common standard for APIs also simplifies integration with web applications. Customers benefit from shorter release cycles and less support. The documentation of the interface is publicly available: https://developers.brandmaker.com/api/ReviewManager/</td></tr>
<tr><td>Improved Performance When Switching Between Tabs</td><td>The speed of switching between the Annotations and General tabs of a review has been improved. Previously, the data had to be reloaded when changing tabs, which led to longer loading times. As of version 8.0, the data is no longer reloaded when changing tabs. This significantly improves the user experience, as switching between tabs is much faster. The content of the review is retained and does not need to be reloaded.</td></tr>
<tr><td>Improved Clarity in Review Manager Terminology</td><td>We've updated the language in all areas of the Review Manager to make it more consistent and intuitive. These changes affect the Review Manager module, email notifications, and the connection to Job Manager. Here's what you need to know:

Clearer Role Distinctions

Owners: You remain the only ones who can approve a review, closing it.
Reviewers: You now accept a version instead of approve it. This clarifies that you're casting a vote, not closing the review.

Consistent Terminology

We've standardized terms and phrases across all areas where reviews appear.
You'll see updated wording in buttons, notifications, and settings.

Unchanged Functionality

While the wording has changed, the core functionality for owners and reviewers remain the same.

These updates make the review process more transparent and align the language across the system. You should find it easier to understand your role and actions within the review process.</td></tr>
</table>

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>@Mention Update: Preserving Inten-ded Roles in Reviews</td><td>We've made an important change to how @mentions work in the review process, ensuring that roles and permissions remain as intended throughout your workflow.

Key Improvement:
@mentioning uploaders or owners no longer automatically adds them as reviewers
Why This Matters:

Role Clarity
Prevents unintended changes to participant roles
Maintains the distinction between uploaders, owners, and reviewers
Streamlined Review Process
Avoids confusion caused by unexpected voting rights
Ensures the review structure stays as you designed it
Improved Workflow
You can @mention uploaders and owners for questions or comments
No need to worry about accidentally altering review permissions

How It Works:

When you @mention an uploader or owner in a comment, they'll be notified as usual
However, their role in the review will remain unchanged
They won't be added to the reviewer list or gain additional permissions anymore

</td></tr>
<tr><td>SOAP removed</td><td>API calls can now only be created via REST interface. See API site.</td></tr>
</table>

Review Manager Discontinuations

Ability to Start a 'Simple Review'

As of version 8.0, the ability to start a “simple review” (a review that not connected to a job workflow) is no longer available. Therefore, reviews in 8.0 must be started from within a job (in Job Manager). We are planning to deliver similar functionality to “simple reviews” in an upcoming version, by adding the ability to create standalone reviews that don’t require a connection to a job (or the Job Manager module). In the interim, we recommend setting up a simple job with minimal steps for the purpose of performing reviews as a workaround solution.

Act Like Owner Permission

The former *Act Like Owner* permission (which was deprecated with version 7.3) allowed administrator users to view and edit all reviews, including reviews in which they were not a participant. To provide more granular access control and ensure review histories are properly tracked and attributed, this permission has been replaced with the Access all reviews permission.

The new permission allows users to access reviews in read-only mode only. This means that while users can view the reviews, they are unable to make any changes to them. To create similar functionality to the discontinued *Act Like Owner* permission, you can combine this new permission with the existing *Manage participants* permission: this gives users the ability to invite themselves to any review and make changes as a participant.

Email All Participants

The function to send an email to all participants in a review with a single click is no longer available in version 8.0. However, you can still send emails to each participant in a review individually, and we are exploring ways to bring similar functionality back to Review Manager in a future update.

