Uptempo

Administration

Administration Manual

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We are always grateful for tips on errors. Simply send us an e-mail to documentation@uptempo.io.

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1

Getting Started

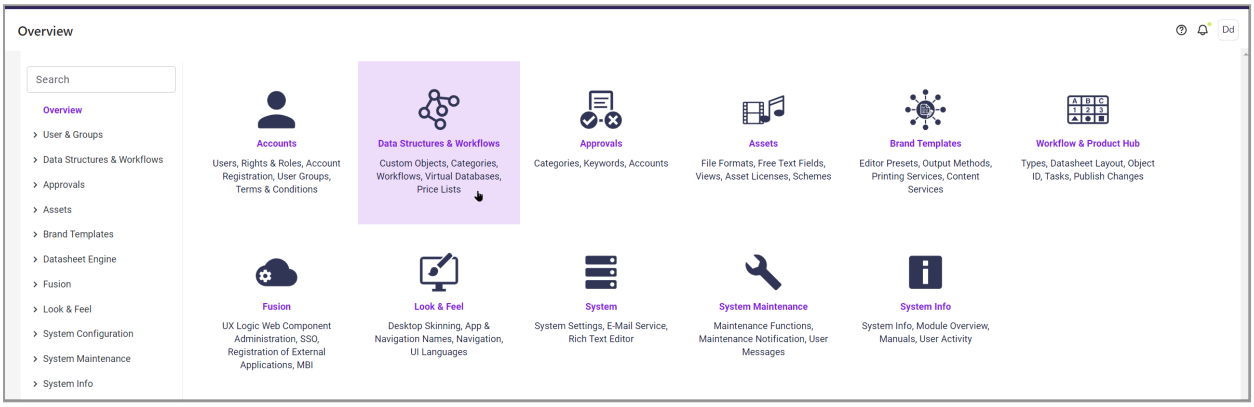
Here you will find some tips and information to help you perform tasks related to the administration of the Uptempo platform efficiently. Use the navigation menu on the left to navigate to sub areas such as *User List*, *Permissions*, *SSO groups* and Overview.

Navigating Administration

You can access the aforementioned administration areas by choosing the gear icon and then select:

- *> Administration > User List*
- *> Administration > Permissions*
- *> Administration > SSO groups*
- *> Administration > Overview*

On the page *>Administration > Overview* you can navigate through the administration menu items on the left-hand side. If you want to activate one of the top menu items directly, click the relevant tile on the right, e.g. *Assets*.



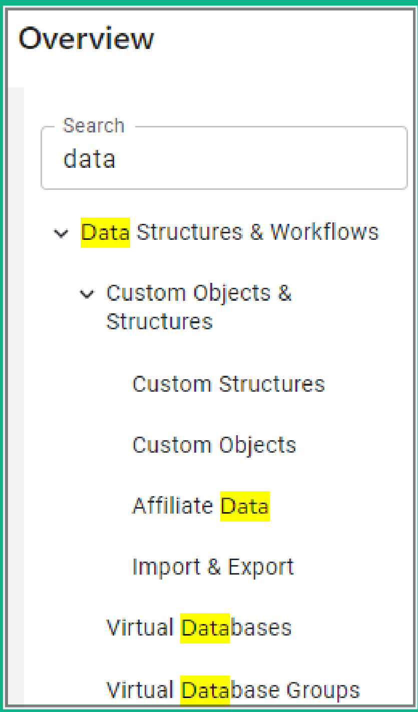
If you are looking for a topic but do not know where to find it, enter a search term in the search line above the navigation menu.

EXAMPLE

You want to open the Virtual Databases page to configure it:

1. Type *Data* in the search box.

   All corresponding links are displayed below the search term:

2. Click the desired result.

The page that you are searching for opens.

1.1 New and Changed

- **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). A new caching system makes it faster to get data, so you can access CS/CO information almost instantly. It is more responsive and has less latency, which makes it easier to work and get things done faster. The optimizations significantly reduce load times across all operations, benefiting both current and 7.4 customers.
- **Database Upgrade:** MySQL 8.0 now powers all our Work Management modules. This delivers enhanced performance, improved query optimization, stronger security and advanced JSON support.

1.2 Writing Conventions

Notes appear in a dark gray box.

Warnings appear in a text box framed in red.

Click paths are indicated by > *Click here* > *and then here*.

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2

Privacy

The General Data Protection Regulation (GDPR) is a European Union regulation that harmonizes the rules governing the processing of personal data by private companies and public authorities throughout the EU. To ensure that your organization is GDPR compliant with the Uptempo platform, please refer to the following sections.

Personal Data

The stores the following personal data of users:

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

Visibility of Personal Data

Part of the normal workflow in the is for a user to collaborate or contact other users in the Uptempo platform, for example, when applying for a market development fund or sending an asset via E-mail. In these places, only the first and last names of other users are displayed.

Based on a user's role in the system, it may be necessary for the user to have extended access to personal data (need-to-know principle). This is the case, for example, for user administration. This extended access is regulated through existing permissions in the platform.
When creating roles, pay close attention to the assignment of permissions and the associated visibility of personal data. Assign roles that allow advanced access to personal data to only a small number of properly trained users!

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

Note

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

Erasability of Personal Data

When you delete a user as an administrator, all personal information is deleted from the Uptempo platform database.

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

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3

User Administration

Navigate to > *Administration* > *User List* . This is where you can create new users or edit existing users.

Prerequisites

You have the permission *Manage User*.

> Note
>
> You can restrict user administration by assigning the permission *Manage User Own Org* to a role. Users who have this permission can navigate to the page > *Administration* > *User List* and search for and edit existing users in their own department. It is not possible for these type of administrator to create new users.

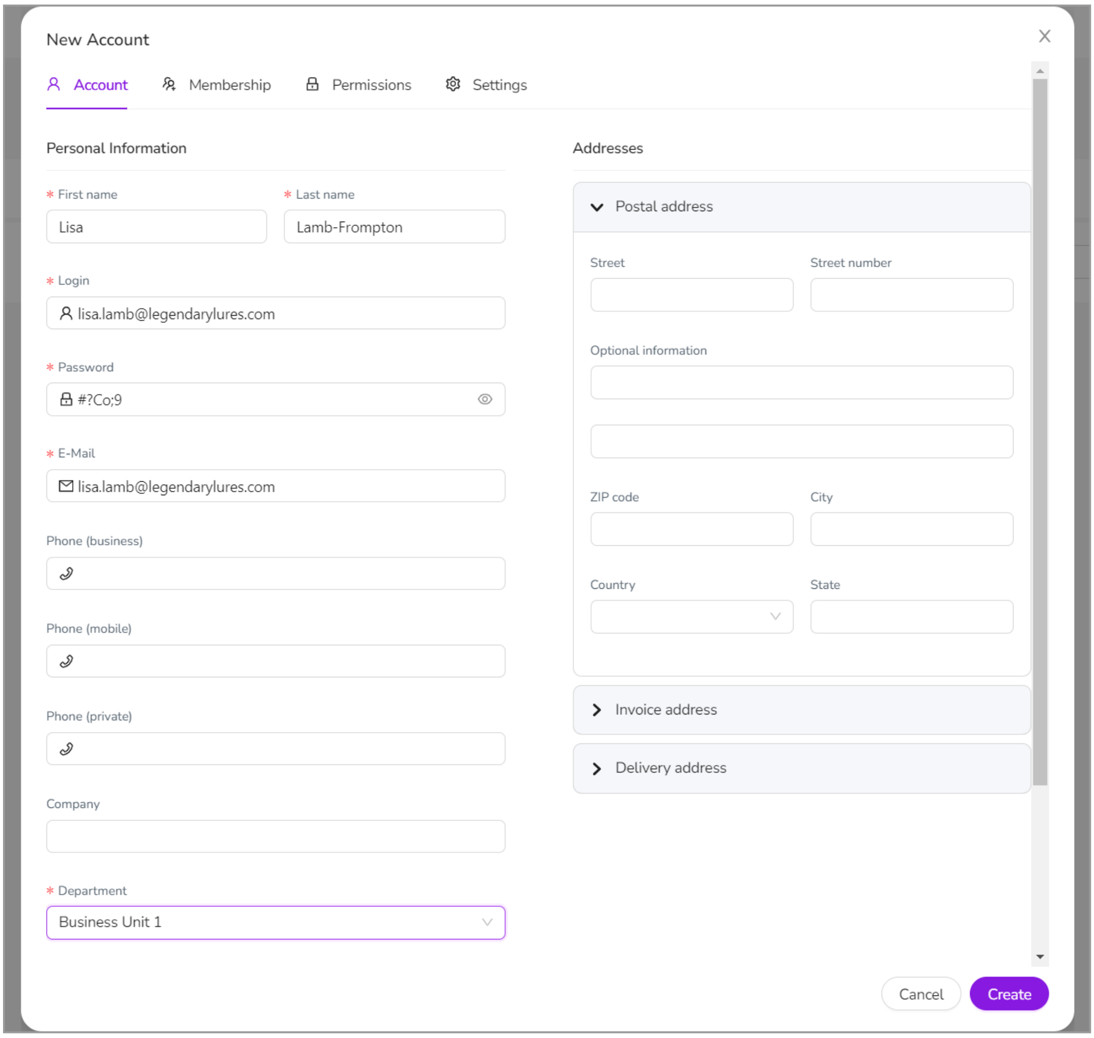
3.1 Create a User Account

*Prerequisite*You have the permission *Manage User* and you already prepared roles with sets of permissions for each module that you want to assign to the user account.

1. Click > *Administration* > *User List*.
2. In the *User List*, click + *New Account* button.

   The *New Account* dialog box is displayed.
3. Fill in the new user's details on the *Account* tab. All fields marked with a red asterisk are mandatory.
   a. Enter the user's first and last name.
   b. Enter a user name in the *Login*field.

      Note: The login must be the full e-mail address, if you are using *Plan* and *Spend* modules.



c. Enter a password. To make the password visible while typing, press the eye icon.

d. Enter the e-mail address of the user.

e. Select a department from the drop down list. This department equals one of the *Organizational Units* created earlier. See *Organizational Units* on page 52.
Note: On smaller screens you may need to scroll down to find the dropdown.
You have entered all required user data.

f. Optional: Fill in the other fields such as phone, addresses, company, etc.

4. Navigate to the *Membership* tab.

   a. Optional: Click the *Assign team* button to add the user to a team. Note: A team is also called a *User Group* in the UI. See creation of *User Groups* on page 32.

A selection list is displayed.

b. Optional: Select a team.

> **Note**
>
> Assigning teams is necessary only when your users are part of a workflow in either the module *Workflow* or *Assets*.

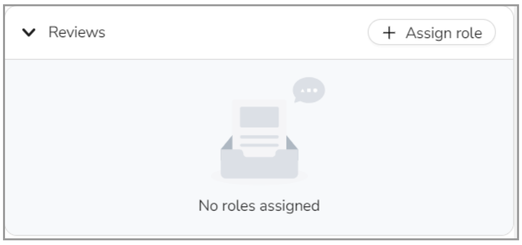
c. Click the *Change storage group* button to choose the storage group that the new user can access. Note: A selection is required.

A selection list is displayed.

d. Select a storage group. Note: A storage group is also called a VDB group in the UI. See *Storage Groups* on page 49.

> **Note**
>
> If you wish to create a new user but are not sure about the permissions, you can assign roles later. Skip the following for now and continue with step 6.

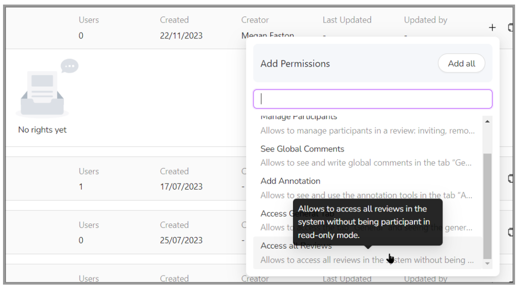
5. Navigate to the *Permissions* tab. For each module that a user needs access to, you must assign a role. A role is a set of permissions (rights) to allow the user to see and execute specific things. With no role assigned, the user is unable to access that module.



a. Click *+Assign Role* for each module you want to give the user access to.

A dropdown is displayed.

b. Select the appropriate role. Select *Administrator* to make the user an Administrator for that module.



6. Navigate to the *Settings* tab.

   a. Optional: Select a default system language for this particular user by clicking the *System Language* drop down list. If you leave it empty, *English (United States)* will be the fall-back language and is preselected next time you edit this account.

      Note: Plan & Spend is currently only available in English.

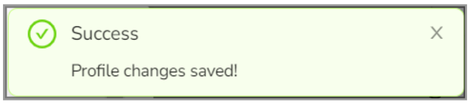
   b. In the *Start Module* drop down list, select a start module for the user.

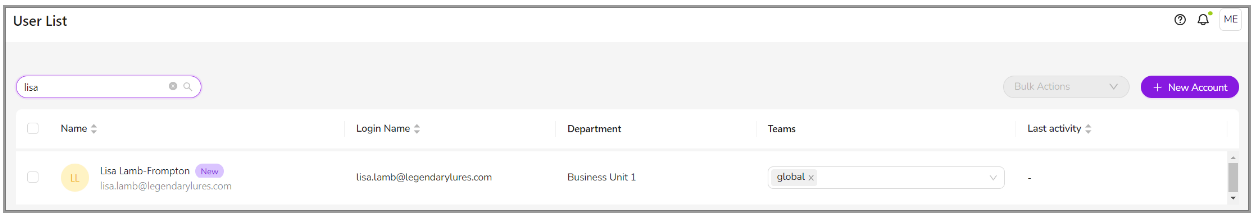
      Note: Not yet available for Plan & Spend modules.

   A notification will be displayed if the operation has been completed successfully. In case of an error or missing fields, you will be also notified.

7. Click *Create* to add the new user to your system.

The *New Account* dialog box closes.



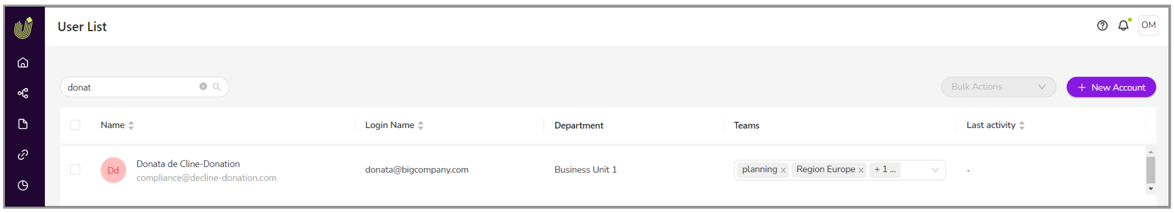


Recently created users are tagged as *New* in the *User List*. The new user has now been created and is ready to log in.

3.2 Edit a User Account

*Prerequisite*You have the permission *Manage User*.

1. Select > *Administration* > *User List*.
2. Locate or search the user account you wish to edit in the list of existing accounts.



3. Click into the row of the user account.

   A dialog with the user information is displayed on the right.
4. Optional: On the top right corner of the panel, click the icon to copy the link to that user account. You can then send it to a team member for further editing.
5. In the bottom right corner of the dialog, click *Edit Account*.

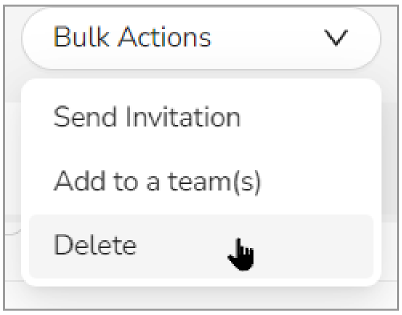
   The dialog with the user account settings is displayed.
6. Update any fields as needed, such as changing the password or roles. Switch to the other tabs to change the assignments, authorizations and advanced settings.

You have edited an existing user account.

3.3 Delete User Accounts

*Prerequisite*You have the permission *Manage User*.

1. Click > *Administration* > *User List*.
2. In the list of existing users accounts, locate or search for the accounts you want to delete.
3. Tick the box at the left of every user account's row you wish to delete.
4. Click on the *Bulk Actions* menu button.
5. Select *Delete*.



The user account(s) will be removed from the *User List* and from the system.

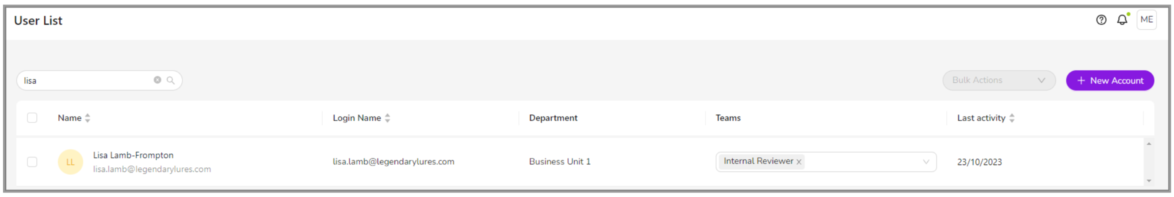
3.4 Assigning a User to a Team

Lisa Lamb-Frompton is the team leader of the organizational unit *Internal Reviewer*.You now also want to assign her to the team *Content Creation Internal*.

Prerequisites

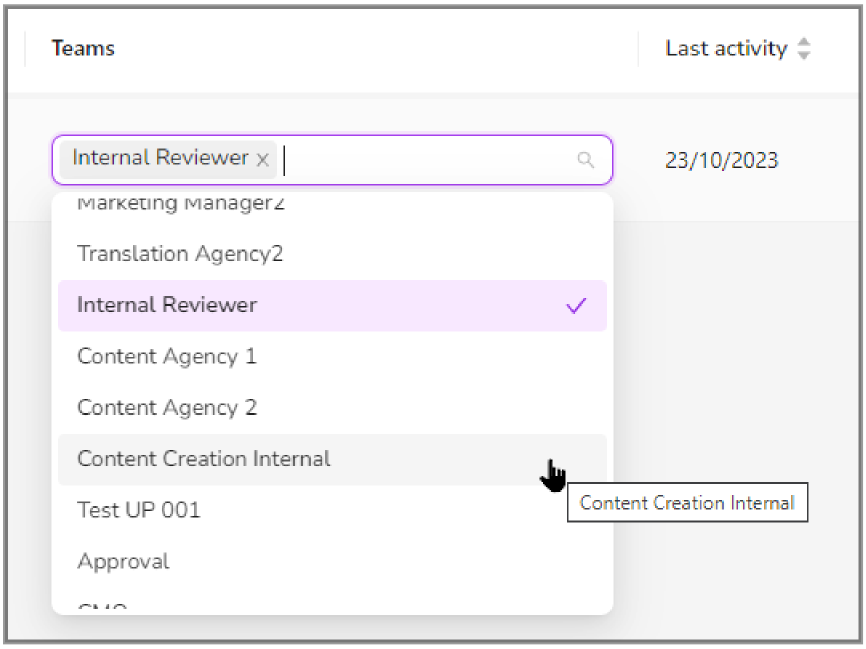
- You have the permission *Assign User Groups*.
- The users and user groups (Teams) mentioned have been previously created.

1. Click >*Administration* > *User List*.
2. Search for the user. Enter a part of the name or e-Mail of *Lisa Lamb-Frompton*, e.g. *Lisa*.

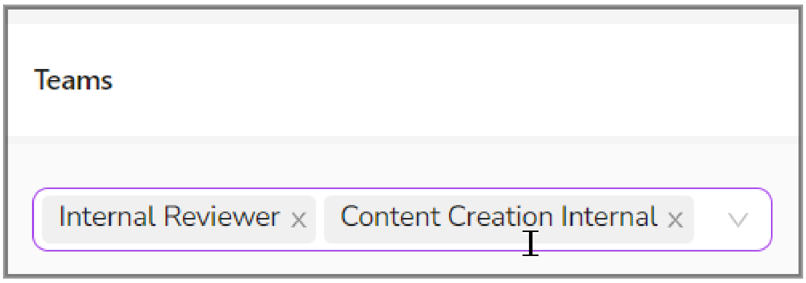


The user is displayed.

3. In the *Teams* column click the ∨ arrow for a menu of available teams.
4. Scroll down to *Content Creation Internal* and click on the entry.



A checkmark is set and the team name appears in the top Team column.



You have assigned the user *Lisa Lamb-Frompton* to the user group *Content Creation Internal*.

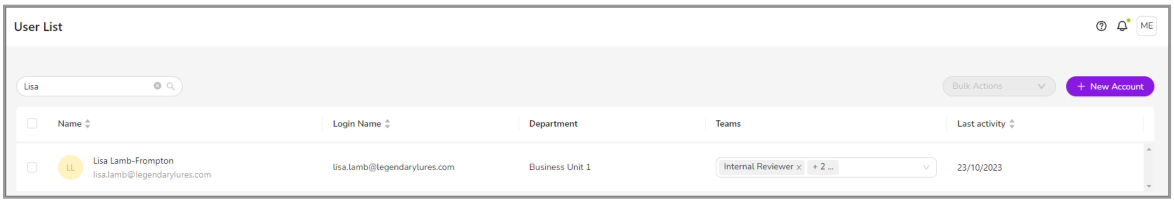
3.5 Removing a User From a Team

You want to remove the user *Lisa Lamb-Frompton* from the team *Content Creation Internal*.

Prerequisites

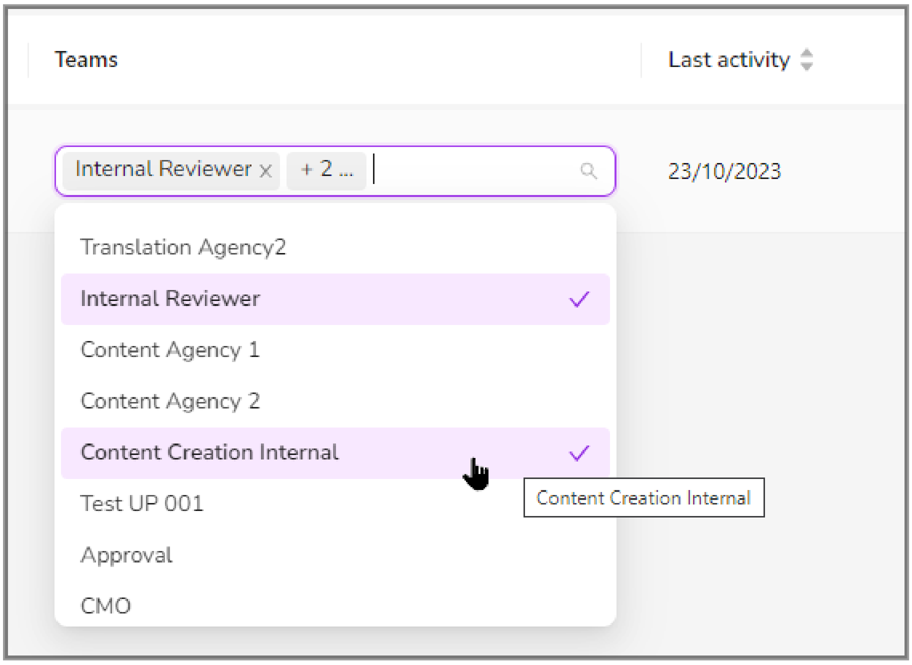
You have the permission *Assign User Groups*.

1. Click >*Administration* > *User List*.
2. Search for the user. Enter a part of the name or e-Mail of *Lisa Lamb-Frompton*, e.g. *Lisa*.



   The user is displayed.

3. In the *Teams* column, click the menu.
4. In the *Teams* menu, scroll down to locate the entry *Content Creation Internal*.

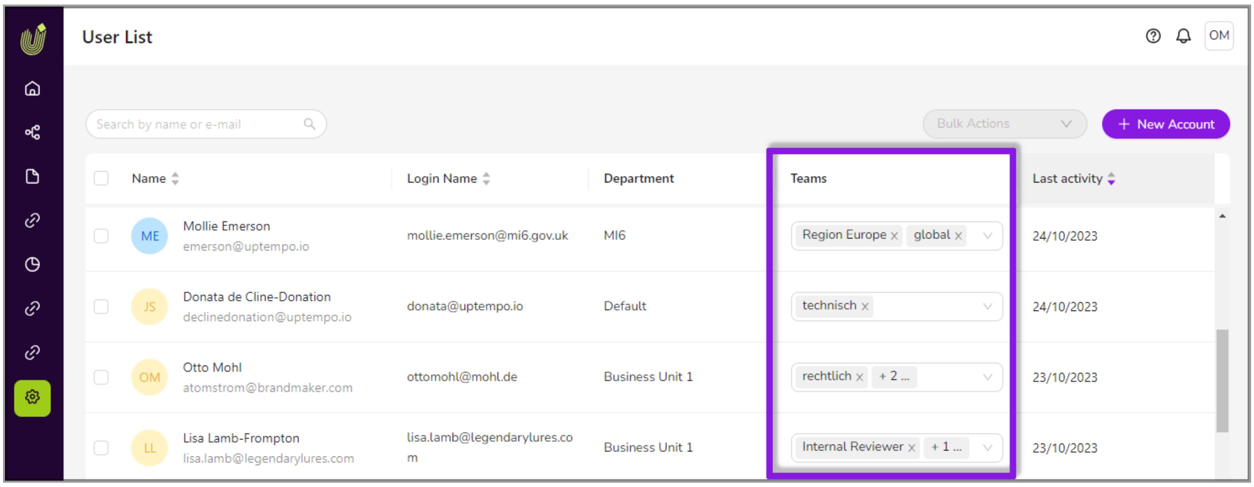


5. Click on the checkmark to remove the user from the team.

The user *Lisa Lamb-Frompton* has been removed from the team *Content Creation Internal*.

3.6 User Groups

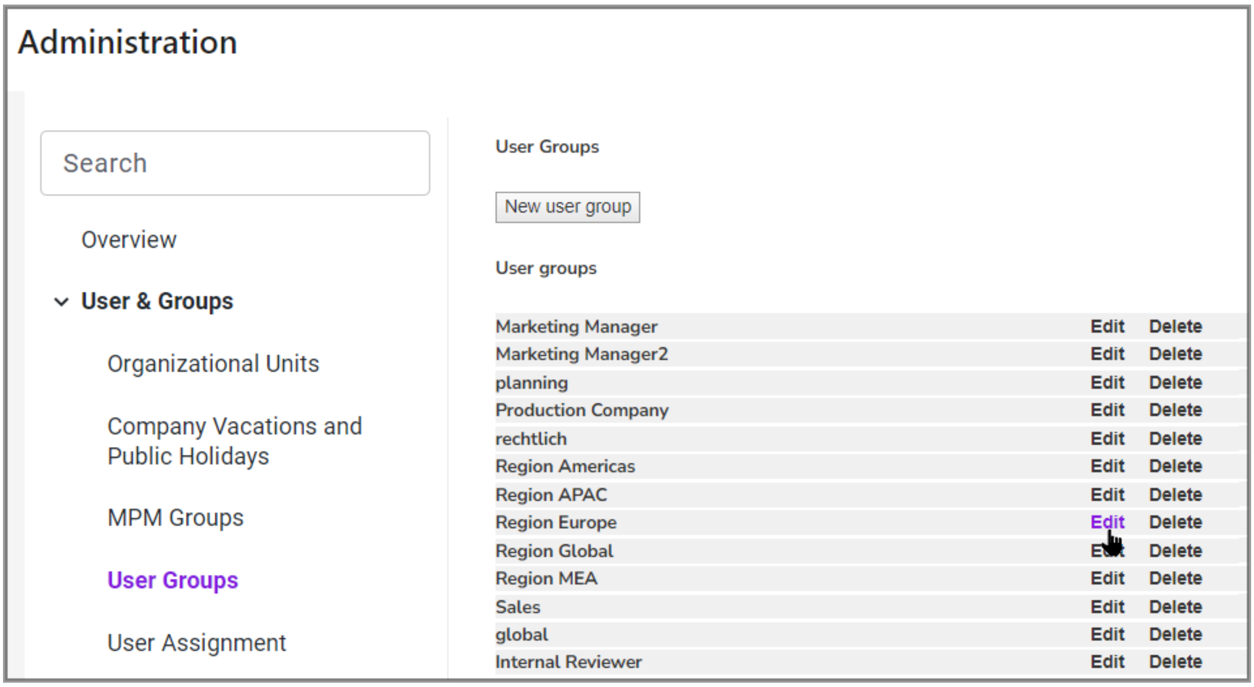
Multiple users are grouped together in user groups. You can view the user groups of a single user, then referred to as *Teams*, when navigating to > *Administration* > *User List*.



You use user groups in the following cases, for example:

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

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



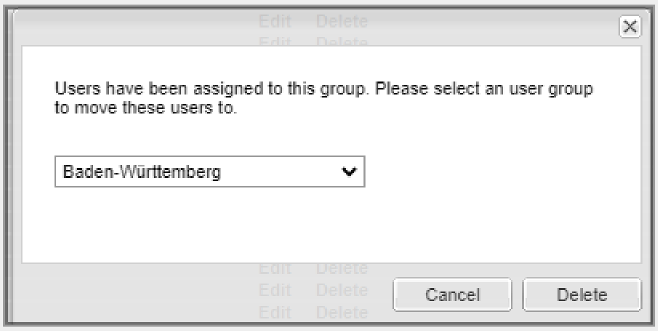
Prerequisites:

You have the permission *Manage User Groups*.

Functions

You can call the following functions on the overview page:

Name	Description
New user group	This lets you enter the name for a new user group.
Edit	This changes the name of the selected user group.
Delete	This deletes the selected user group.

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

Related Actions

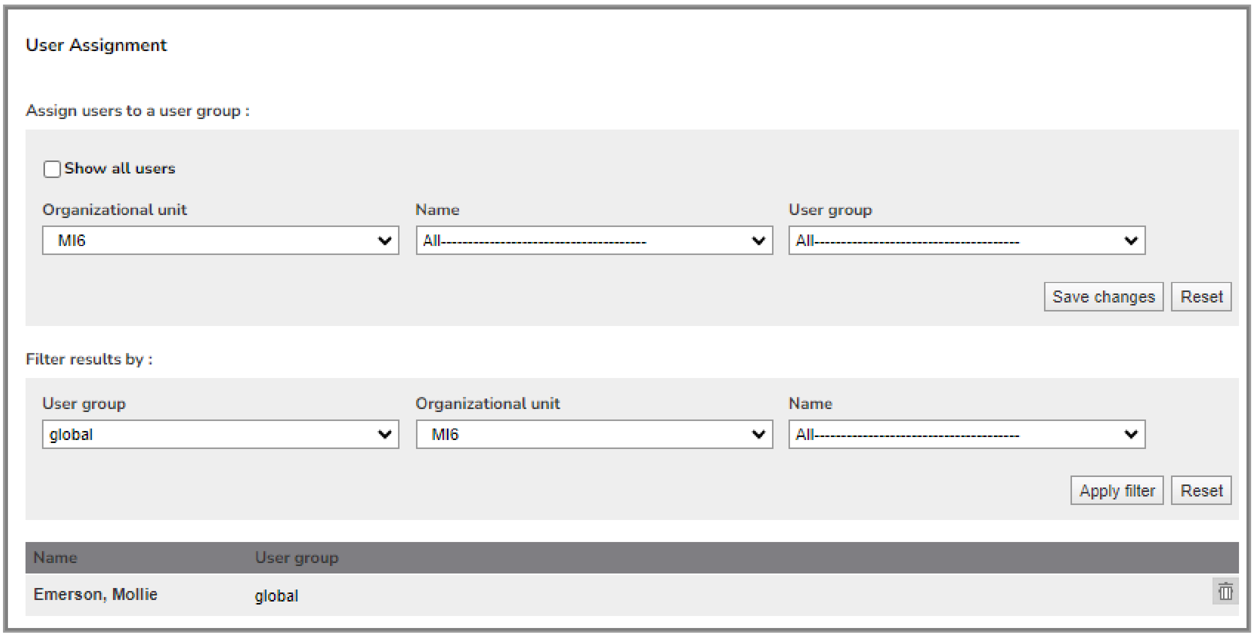
- *Assigning a User to a Team* on page 29

3.6.1 Assigning and Removing Users From Groups

Navigate to > *Administration* > *Overview* > *Users & Groups* > *User Assignment*.

You can:

- Assign users to a user group, which will later be also referred to as a team.
- Remove users from a user group, which is also possible in the > *Administration* > *User List* , *Edit Account* dialog.
- List all the users assigned to a user group, which can only be done here since there is no equivalent in the *User List*.



Note

When creating a new user all the user groups created and assigned here later refer to a *Team*during the account creation process on the *Membership* tab. The term team is also used when opening and editing an existing account on the > *Administration* > *User List*.

Assign Users to a User Group

It is still possible to assign users to a user group (Team) in the old interface.

1. Navigate to > *Administration* > *Overview* > *Users & Groups* > *User assignment*
2. Activate the *Show all users* checkbox.

   Users who already belong to one or more user groups are listed below the filters.
3. Select the organizational unit of the user from the drop-down list on the left.
4. To set the user group for a user, select the name from the *Name* drop-down list in the middle.
5. Select a User group (Team) from the drop-down list on the right.
6. Click *Save changes*.

   The user is now listed below the filters with the new assignment to a user group.

You have assigned the user to a user group.

To assign the same user to another user group, click the *Reset* button and perform the steps above again.

> Note
>
> If the user you're looking for doesn't appear in the drop-down list of names, tick the *Show all users* checkbox before searching to avoid problems finding them.

Remove Users From a User Group

It is still possible to remove users from a user group (Team) in the old interface.

1. Navigate to > *Administration* > *Overview* > *Users & Groups* > *User assignment*.
2. Activate the *Show all users* checkbox.

   Users and their user groups are listed below the filters.
3. Locate the user and the corresponding user group in the alphabetical list.

   If the user belongs to multiple user groups, there is an entry for each.
4. Click the trashcan icon to delete the user from that group.

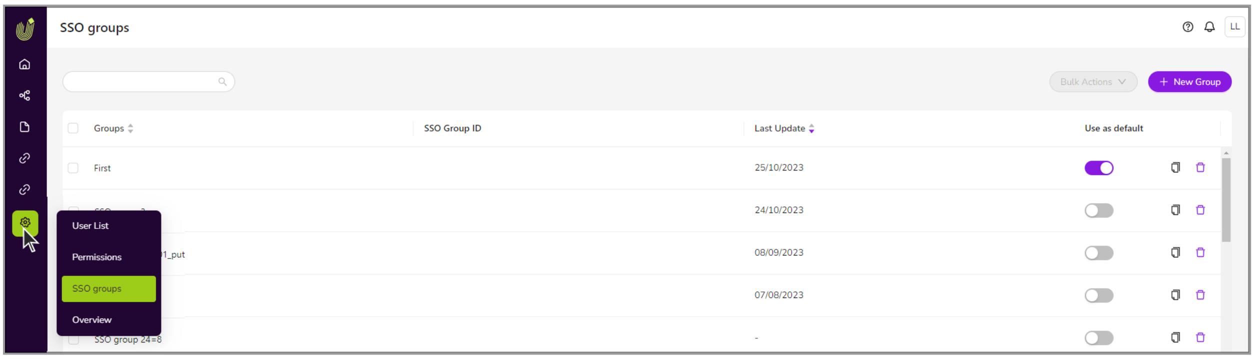
   A warning dialog box opens.
5. Click *Yes*.

You have removed the user from a user group.

3.7 SSO Groups

Prerequisites

- Roles have already been created for each module, so you can assign them to an SSO group using the drop-down list.
- At least one VDB group has been created, which you can assign to the SSO group.
- Optional: If in use, least one catalog group for the Marketing Shop has been created, which you can assign to the SSO group.



You can activate the slider*Use as default* to define that users created via the interface are assigned to this SSO group.

> **Note**
>
> You can only select one SSO group as the SSO default group at a time. Users are assigned to the SSO default group only when no other configuration is in place for the user. If you enable a different group, the previously active default SSO group is deselected.

Related Actions

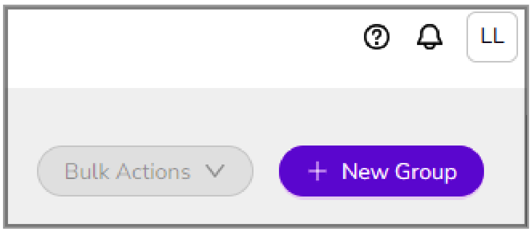
- *Create SSO Group* on the next page
- *Edit SSO Group* on page 40
- *Copy SSO Group* on page 39
- *Delete SSO Group* on page 42

3.7.1 Create SSO Group

Prerequisites

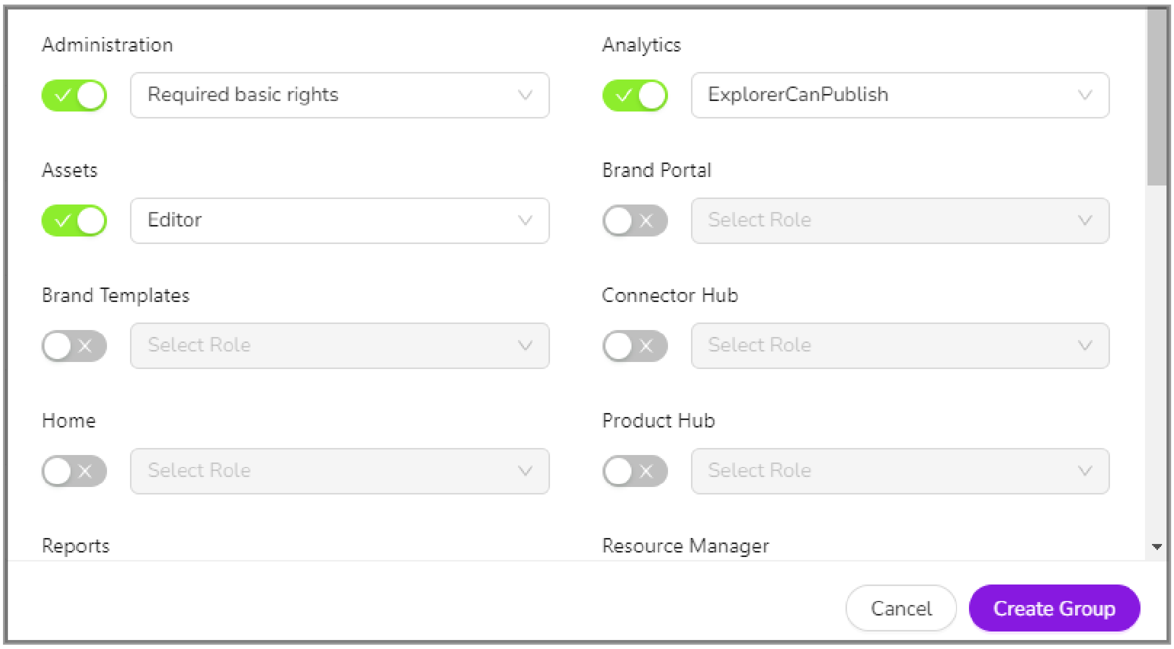
- For the individual modules, roles are already created, which you can assign to an SSO group using the dropdown list.
- You have the permission *Manage SSO Groups*.
- At least one VDB group has been created, which you can assign to the SSO group.
- Optional: If in use, at least one catalog group has been created for the Marketing Shop, which you can assign to the SSO group.

1. Click > *Administration* > *SSO groups*.
2. Click the *New Group* button.



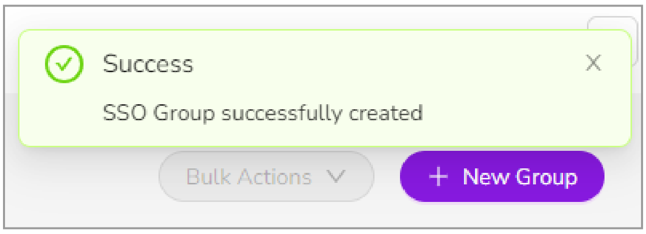
   The *New SSO Group* dialog panel slides in. Fields marked with a red asterisk are required.

3. Enter the name of the new SSO group in the *Group Name* field.
4. Select an *Organizational Unit* for the group from the dropdown menu.
5. Select a *Storage Group* for the group from the dropdown menu.
6. Use the sliders to enable the modules you want to make visible to users in this SSO group and select their appropriate role.



7. Click *Create Group*.

A success message is displayed.



You have created the SSO group.

3.7.2 Copy SSO Group

There are a few reasons why you may want to copy an existing SSO group:

- Quickly create a new group with membership and roles similar to an existing group. Copying eliminates the need to manually add all users and configure permissions from scratch.
- As a template or starting point for a new group. You can copy an existing group that has the basic structure/roles you need, then modify the membership and roles as needed for the new group.

- For testing or staging purposes. You might want an identical copy of a group to try out new configurations or permissions before applying them to the actual production group.
- As a backup in case the original group needs to be deleted or replaced. By copying first, you have a fallback copy of the group membership and configuration.

Prerequisites

- At least one SSO group has been created.
- You have the permission *Manage SSO Groups*.

1. Click > *Administration* > *SSO groups*.
2. Locate the SSO group you want to copy:
    - Scroll the list.
    - Enter a search term in the search field above the list.
3. In the line of the SSO group that you want to copy, click .

    The *Create* dialog opens.
4. Edit the name.
5. Click *Create*.

You have copied the SSO group.

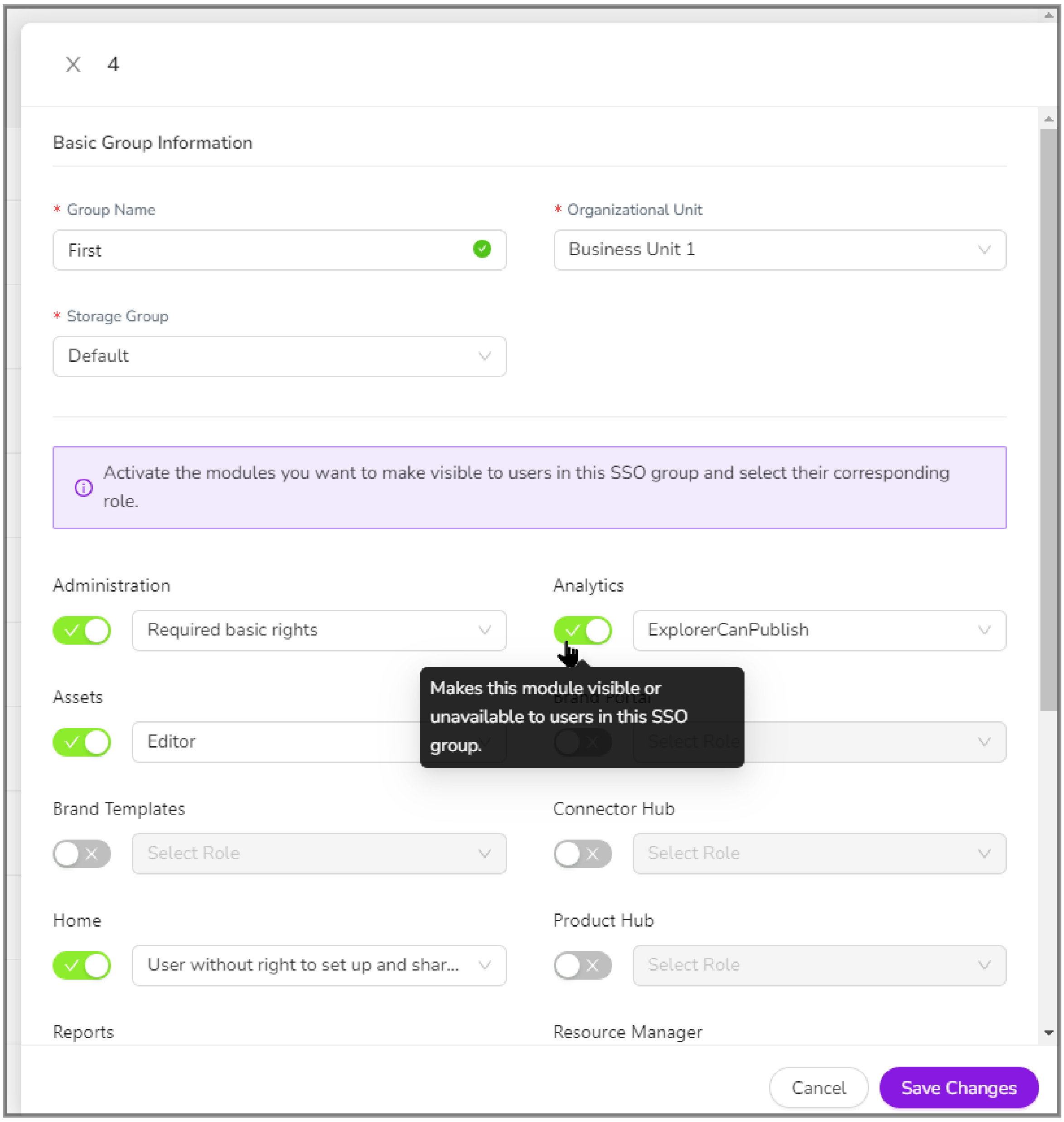
3.7.3 Edit SSO Group

Prerequisites

- An SSO group has already been created.
- You have the permission *Manage SSO Groups*.

1. Click > *Administration* > *SSO groups*.
2. Locate the SSO group you want to edit:
    - Scroll the list.
    - Enter a search term in the search field above the list.
3. In the list, click on the name of the SSO Group that you want to edit.

The edit panel slides in from the right.



4. Optional: Change the name displayed in the first field *Group Name*.
5. Optional: Change the selection for the organizational unit from the dropdown list.
6. Optional: Change the selection for the storage group from the dropdown list.
7. Optional: Use the sliders to enable the modules you want to make visible to users in this SSO group and select their appropriate role.

8. Optional: Use the sliders to disable the modules you want to make unavailable to users in this SSO group.
9. Click *Save Changes*.

You have edited the SSO group.

3.7.4 Delete SSO Group

Attention! Data loss!

You cannot reverse the deletion.

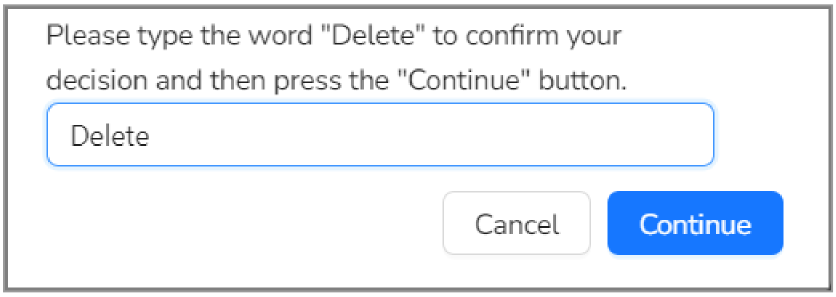
Prerequisites

At least one SSO group has been created.

Delete a Single SSO Group

1. Click > *Administration* > *SSO groups*.
2. Locate the SSO group you want to copy:
    - Scroll the list.
    - Enter a search term in the search field above the list.
3. In the line of the SSO group that you want to delete, click .

    A *Delete* warning dialog box will open.
4. Click *Yes* to confirm.
5. In the following dialog box, manually type the word *Delete* into the text field provided.



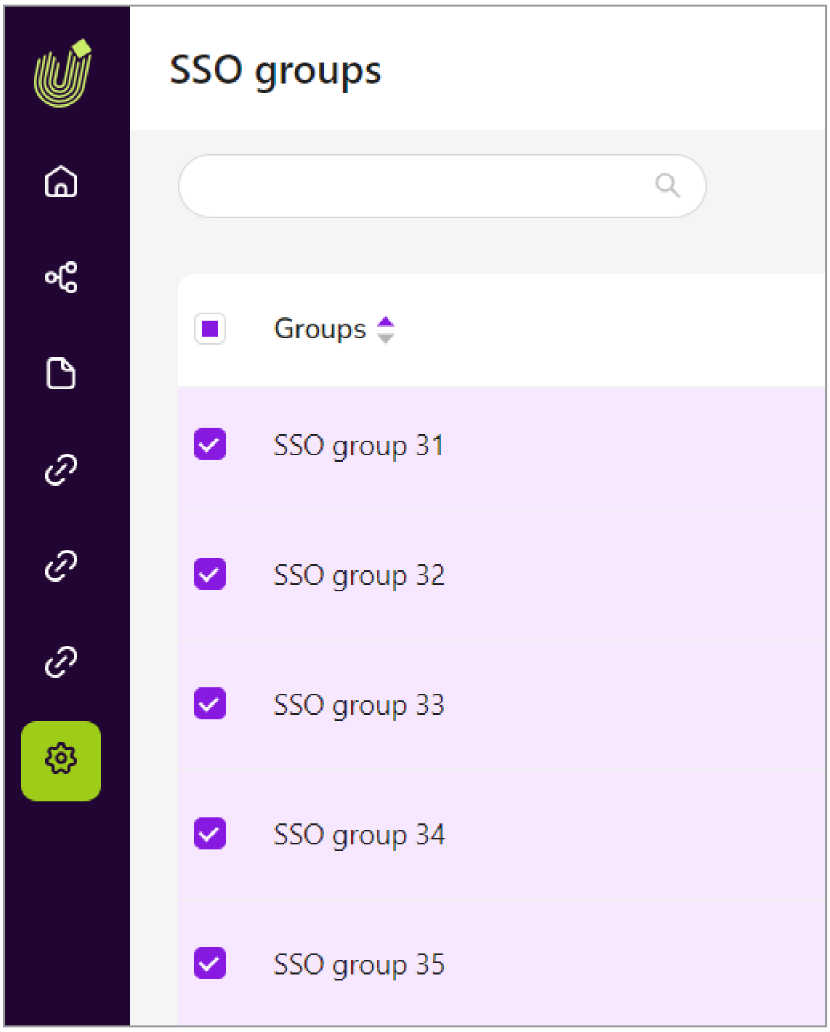
This is a security measure to avoid accidentally deleting groups.

6. Click *Continue*.

The dialog closes and the selected group will now be deleted.

Delete Multiple SSO Groups

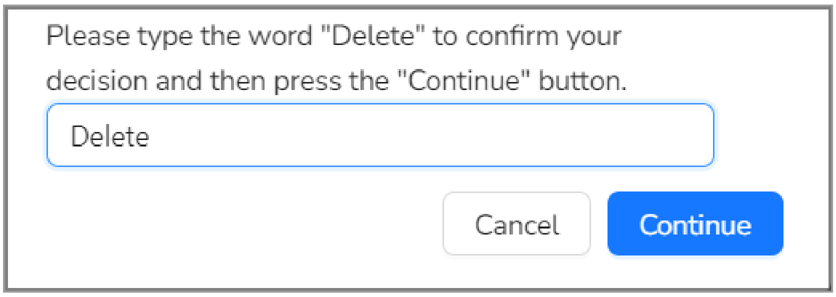
1. Click > *Administration* > *SSO groups*.
2. Locate the SSO groups and click the check boxes left to the names of each SSO group you want to delete:



3. Click the *Bulk Actions* menu at the top of the page and choose *Delete* from the drop down menu.

   A *Delete* warning dialog box will open.

4. Click *Yes* to confirm.
5. In the following dialog box, manually type the word *Delete* into the text field provided.



This is a security measure to avoid accidentally deleting groups.

6. Click *Continue*.

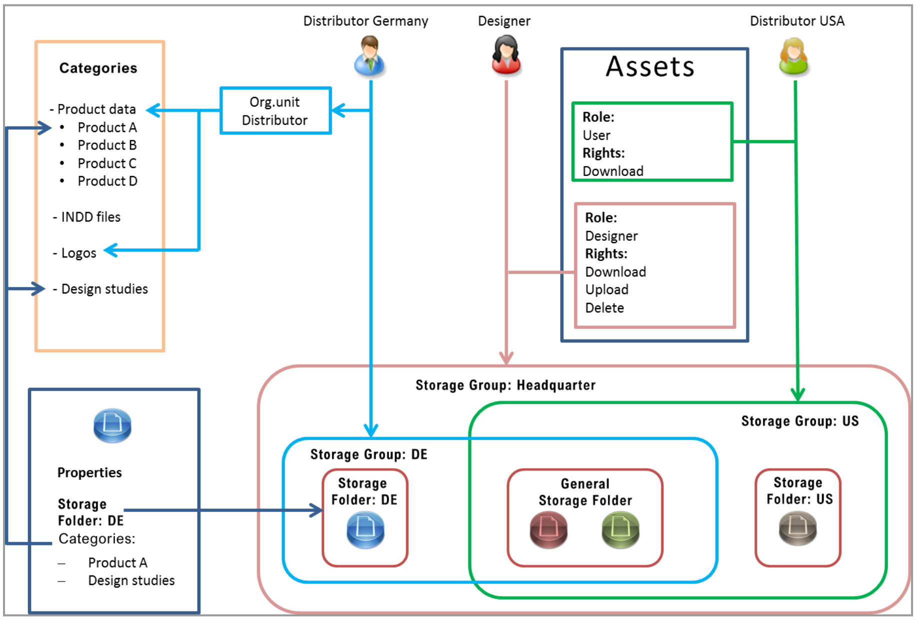
The dialog closes and the selected groups will now be deleted.

4

Defining Access and Visibilities

The platform provides a number of options for restricting access to assets or limiting the use of features. The various options can be combined. This allows you to map different requirement profiles and user profiles.

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



Note

If you have any additional questions, contact your Uptempo contact person.

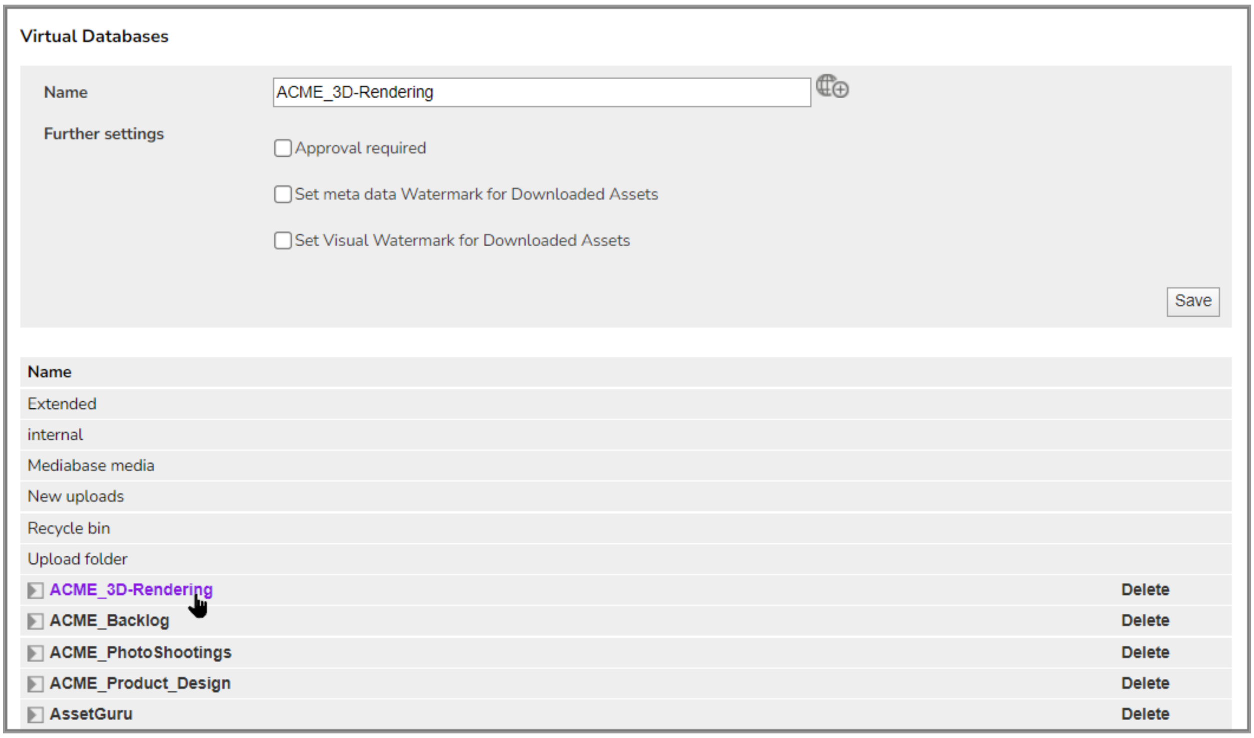
4.1 Storage Folders

Navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Virtual Databases* to display an overview of your existing (VDBs) or to create a new VDB.

Prerequisites

You have the permission *Manage Virtual DataBase*.

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



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

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

Select approval for assets and *Select approval for templates*, define the workflow to be used.

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

You can remove an existing VDB by clicking *Delete*. Note: A VDB can only be deleted if it does not have any assets assigned to it.

> Attention
>
> You cannot reverse the deletion of a VDB.

4.1.1 Create a VDB That Requires Approval

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

Prerequisites:

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

1. Navigate to > *Administration* > *Overview* > *Data Structures & Workflows*.
2. Enter the name of the VDB in the input field. Specify the required language version.
3. Activate the *Approval required* checkbox.

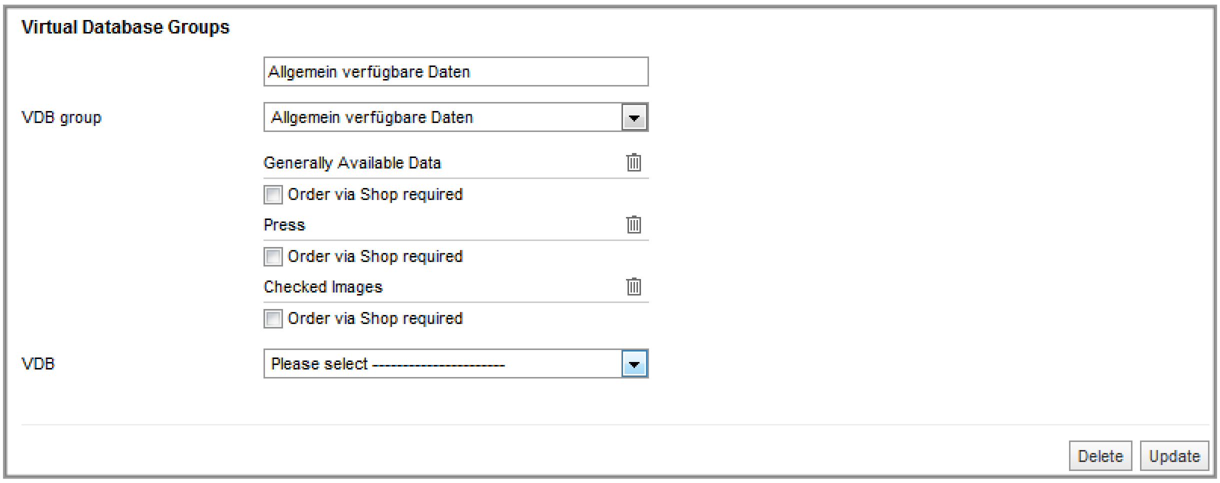
   The dropdown lists *Select approval for assets* and *Select approval for templates* have been added to the input screen.
4. Select a workflow from the *Select approval for assets* selection list.
5. Click *Save*.

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

4.2 Storage Groups

Navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Virtual Database Groups*. You can group multiple storage folders together in a storage group. Each user is assigned to a storage group and, as a result, obtains access to the storage folders that belong to the group and the assets stored in them.

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



> **Note**
>
> Storage groups control access permissions at the storage folder and asset level. Individual users are granted access based on the group to which they have been assigned. Such an approach enables access control via group memberships, as opposed to configuring permissions on a per-user basis.

4.2.1 Create Storage Group

Prerequisites

- You have the permission *Manage VDB Groups*.
- Storage folders have already been created.

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

You have created the storage group.

4.2.2 Edit Storage Group

Prerequisites

- You have the permission *Manage VDB Groups*.
- A storage group has been created.

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

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

You have edited the storage group.

4.2.3 Delete Storage Group

Attention

You cannot reverse the deletion.

Prerequisites

- You have the permission *Manage VDB Groups*.
- A storage group has been created.

1. Navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Virtual Database Groups*.
2. In the *VDB group* selection list, select the storage group that you want to delete.
3. Choose *Delete*.

You have deleted the storage group.

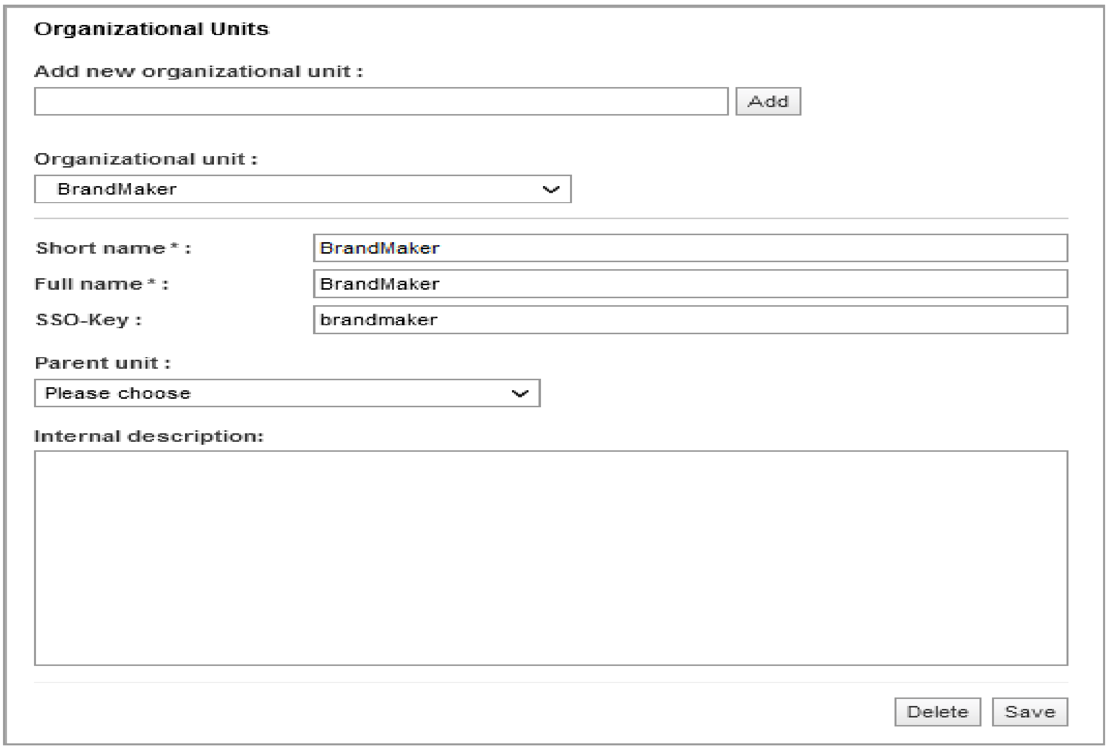
Note

You cannot delete a storage group if there are still users assigned to it. To proceed with deletion, you must first reassign or remove all users from the storage group.

4.3 Organizational Units

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

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



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

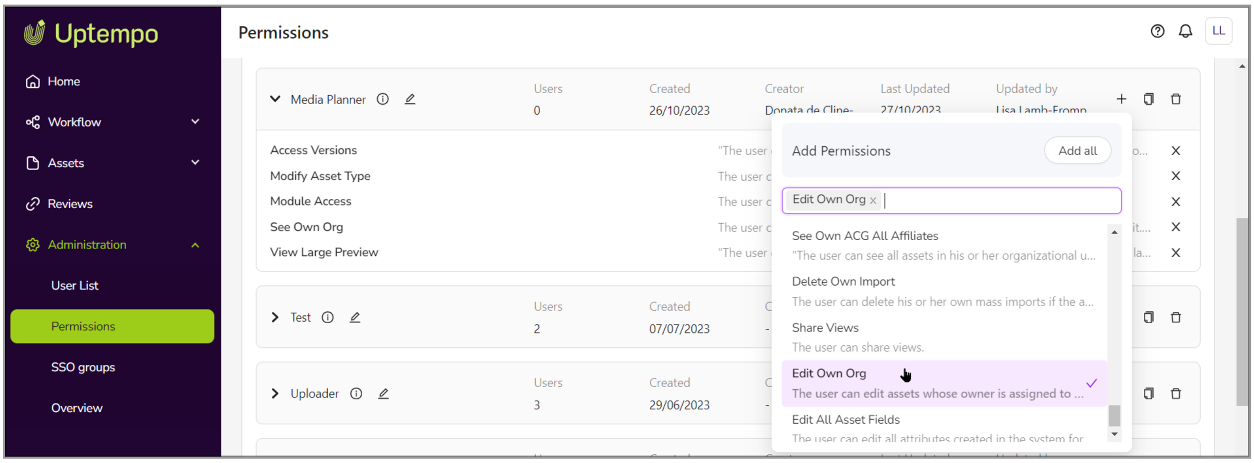
> Note
>
> Organizational Units are also referred to as Department in the UI. Mandatory fields are marked with *.

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

4.4 Permissions and Roles

Dedicated areas within the interface allow administrators to easily create, edit, and assign user roles to define access levels, as well as configure system-wide permissions. You can use the permissions and roles concept to define which functions a user is allowed to execute in the system. Roles describe task profiles and group together permissions that are required to complete the tasks. Each user is linked with a role for each module (exception: the Marketing Planner).

Navigate to >*Administration* > *Permissions* to create and edit roles.



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

> **Note**
>
> The permissions and roles concept is implemented on a customer-specific basis. If you have any additional questions, contact your Uptempo contact person.

Related Actions

- *Create Role* on the facing page
- *Edit Role* on page 56
- *Copy Role* on the facing page
- *Delete Role* on page 59

4.4.1 Create Role

Prerequisites

You have the permission *Manage Roles*.

Create a Role

1. Click > *Administration* > *Permissions*.
2. In the list and in the line with the module to which you want to add a role, click + *Add role*.
3. Enter the name of the role in the *Role name* input field.
4. Optional: Enter a role description in the field below.
5. Click *Create*.

You have created the role, but no permissions have been added yet. You can display the role by clicking the right arrow > next to the module name:

Next steps

Populate the role with permissions. See *Edit Role* on the next page.

4.4.2 Copy Role

Prerequisites

- You have the permission *Manage Roles*.
- A role has been created.

1. Navigate to > *Administration* > *Permissions*.
2. In the list and in the line of the module whose role you want to copy, click .
3. Locate the role.
4. On the right side of the role's line, click .

   The *Copy Role* dialog opens:

5. Edit the copy's role name, otherwise it will be the old name with *copy* added.

You have copied the role.

> Note
>
> All role names must be unique within a module. Duplicate role names will result in an error.

4.4.3 Edit Role

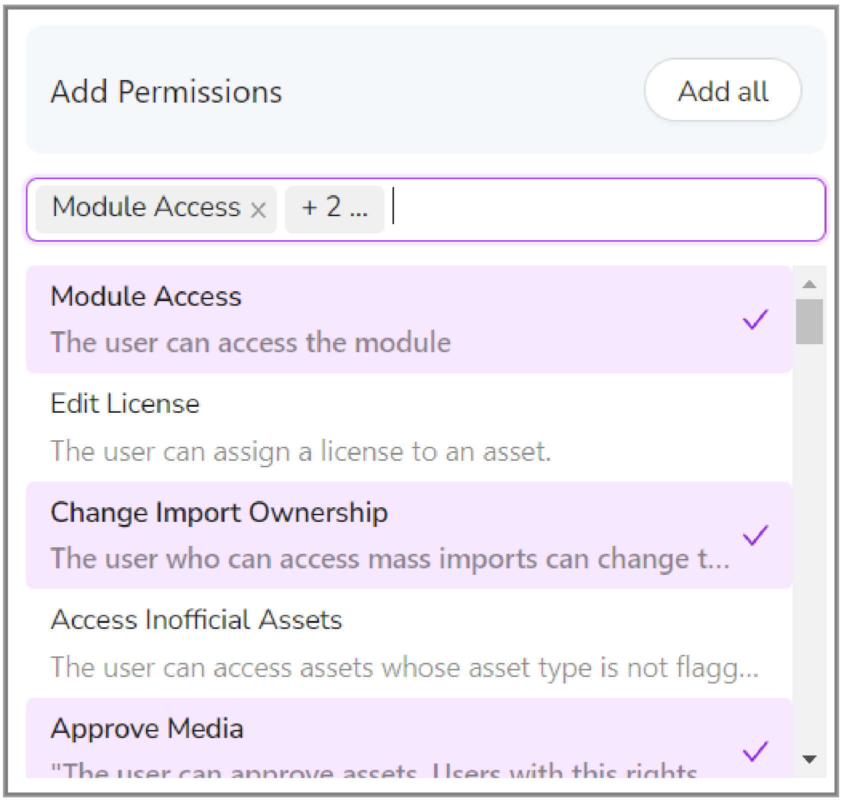
Prerequisites

- You have the permission *Manage Roles*.
- A role has been created.

1. Click > *Administration* > *Permissions*.
2. Click on the module whose role you want to edit.
3. Locate the role in the list.

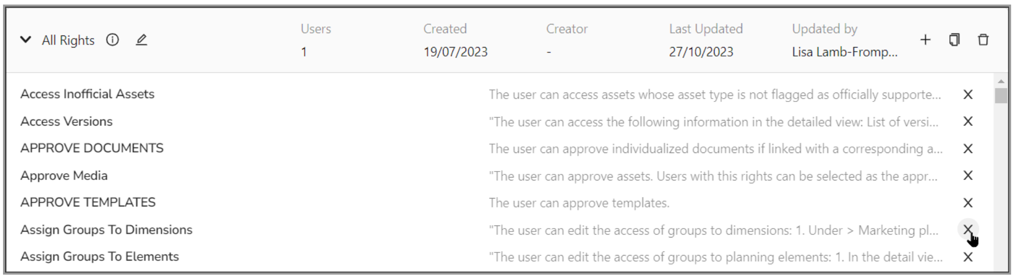
4. Optional: Click the pencil icon to edit the role name and description.
5. Optional: Add permissions to a role.
    a. Click + on the right side of the new role's row.

       The *Add permissions* dialog is displayed. It lists all available rights for this module. It has a search box and an *Add all* button.
    b. Add permission:
        - Locate all the permissions you want to add and click on their name.

        - Instead of picking one by one, first click *Add all* and then later remove the permissions that you do not want to add to the role.

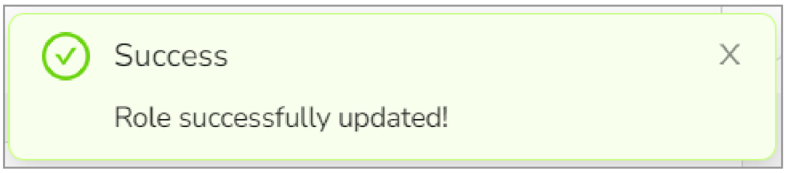
- Click the × icon to remove a right from the role.



Note: To access a module, you must at least add the *Module Access* permission.

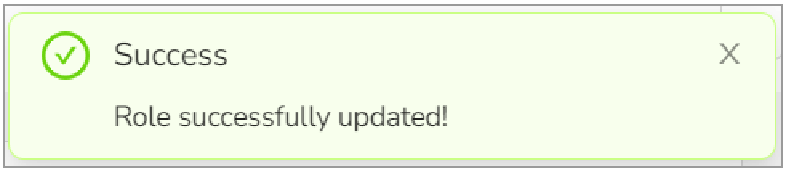
c. Click outside the *Add permissions* dialog to close it and save your changes.

A success message is displayed.



6. Optional: To delete permissions, click × at the right end of the permission description in the role's permission list.

A success message is displayed.



You have edited the role.

4.4.4 Delete Role

Attention! Data loss!

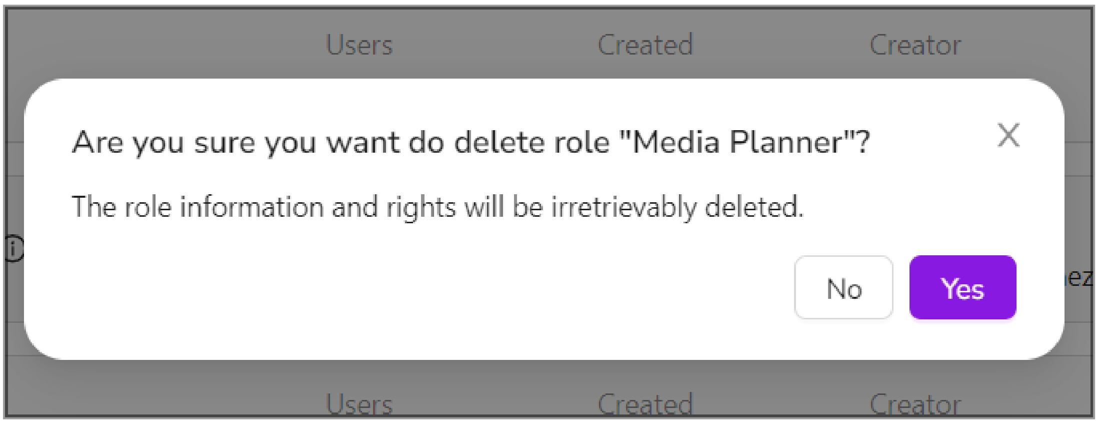
You cannot undo the deletion.

Prerequisites

- You have the permission *Manage Roles*.
- A role has been created.

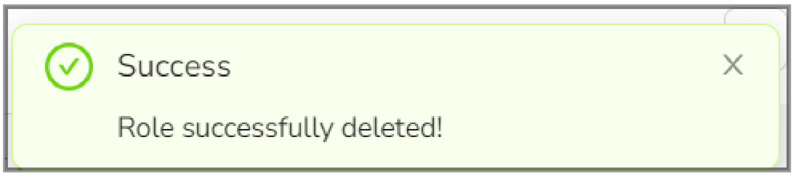
1. Navigate to > *Administration* > *Permissions*.
2. In the list and in the line of the module whose role you want to delete, click ❯.
3. Locate the role in the list.
4. On the right side of the role's line, click 🗑.

   A confirmation dialog opens.

5. Click *Yes*.

   A success message is displayed.

   Note: If a role is still assigned to a user, the administrator must select a fallback role to avoid leaving orphaned users in the system without a role.

You have deleted the role.

4.5 Navigation to the Pages of the Uptempo Platform and the User Profile

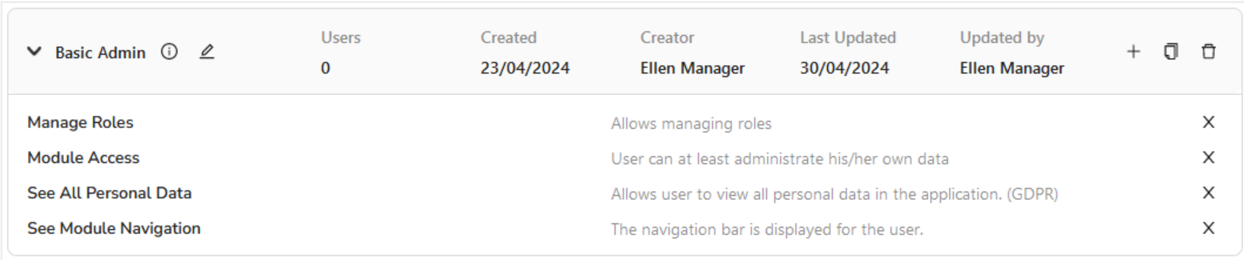
Access to the pages in the main navigation of the Uptempo platform and the user profile is assigned as follows:

1. Users who only need access to Uptempo Plan and Spend:
   Assign the corresponding permissions in the Organizational Settings of Plan and Spend.
2. Users who only have access to Uptempo Plan and Spend, but should also see their user profile:
   a. Assign the corresponding permissions in the Organizational Settings of Plan and Spend.
   b. Assign users a role with the *Module Access* permission for each Plan and Spend page (see *Permissions for Plan and Spend* on page 223). These roles are created under > *Administration* > *Permissions* (see *Create Role* on page 55) and assigned to the user under > *Administration* > *User List*.
   c. Assign the users a role in the administration that allows access to the user profile. Please refer to the following section *Access to the User Profile* below.
   Note: Inform users that they are leaving their user profile by selecting a new page in the main navigation on the left.
   d. If the names of the pages > *Activities*, > *Budget*, > *Investments*, > *Strategy* and > *Insights* have been changed in the Organizational Settings of Plan and Spend, also transfer the changes under > *Administration* > *Overview* > *Look & Feel* > *App & Navigation Names*.
   e. Make sure that the order of the pages in the main navigation is also identical everywhere. Check this under > *Administration* > *Overview* > *Look & Feel* > *Navigation*.
3. Users who need access to pages in Uptempo Work in addition to Uptempo Plan and Spend:
   a. Manage the users as shown in 2.
   b. Activate access to Work in the Organizational Settings of Plan and Spend.
   c. Also assign corresponding roles for the Work modules. hese roles are created under > *Administration* > *Permissions* (see *Create Role* on page 55) and assigned to the user under > *Administration* > *User List*.

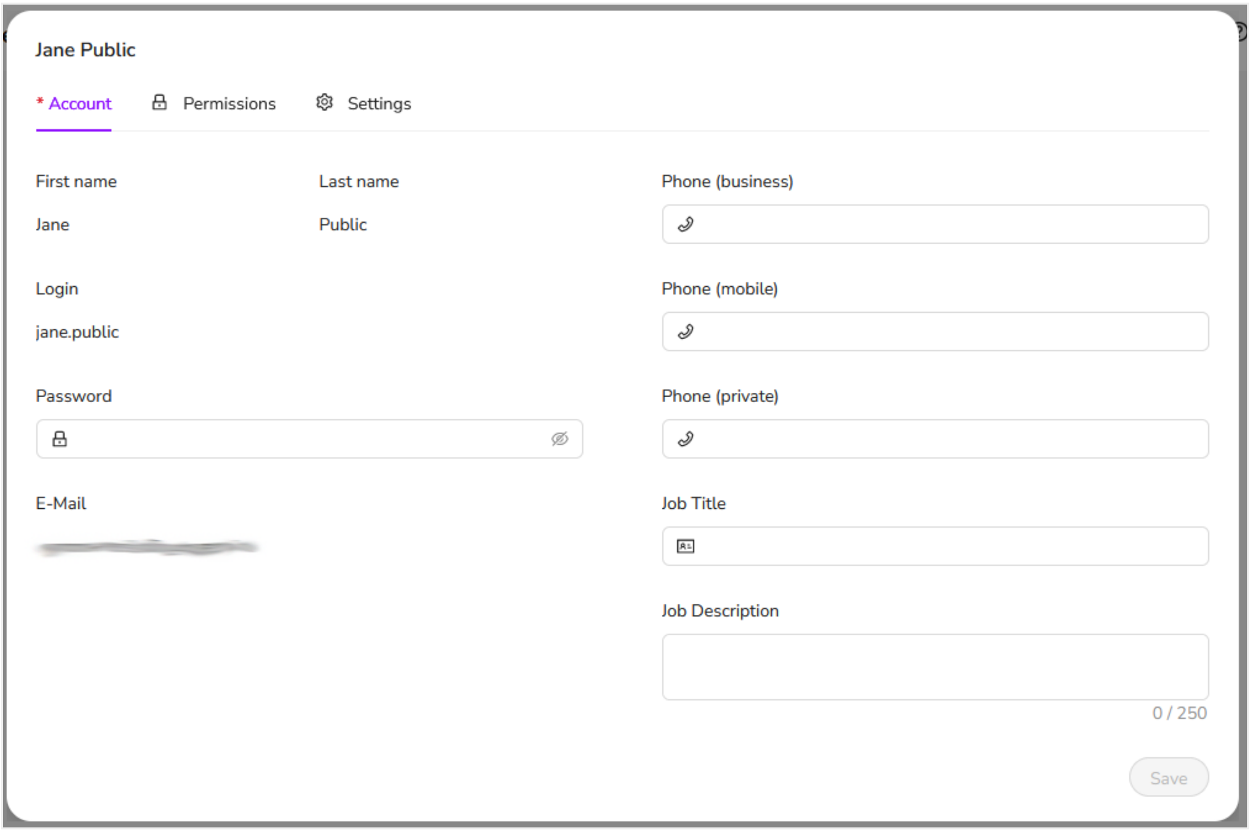
Access to the User Profile

In order for users to gain access to their user profile, the users require a role with the following permissions:

- *Module Access*
- *Manage Roles*
- *See All Personal Data*
- *See Module Navigation*



With these permissions, user see the following user profile:



4.6 Categories

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

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

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

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

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

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

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

Categories are used in the following modules:

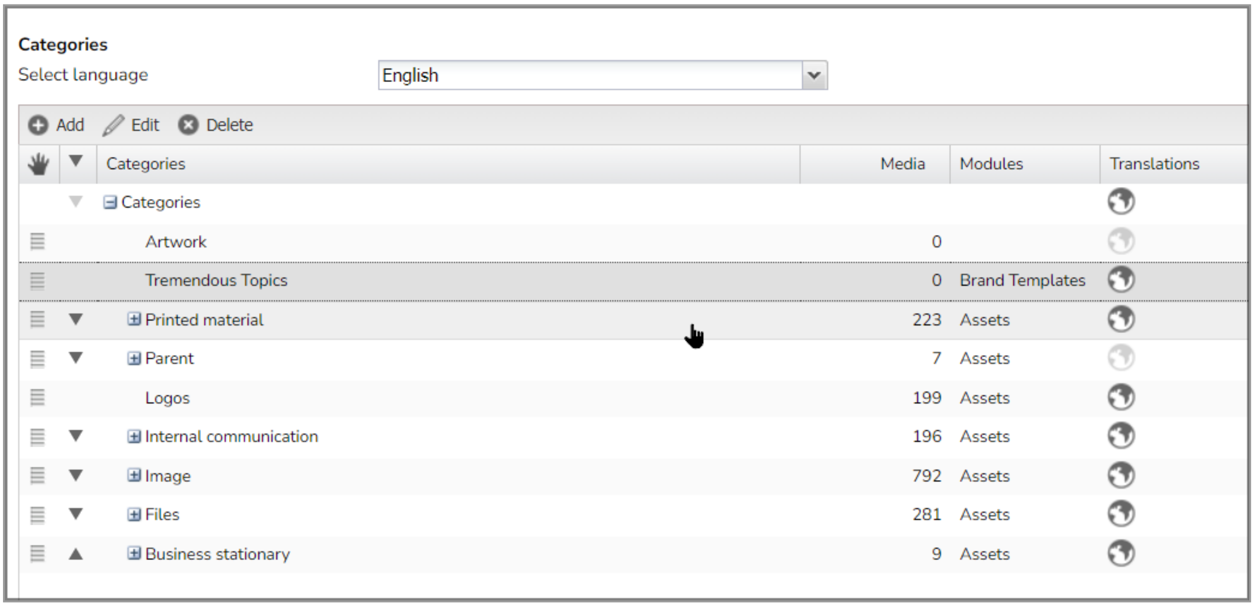
- Job Manager
- Media Pool
- Brand Template Builder
- Marketing Shop
- Marketing Data Hub

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

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

Prerequisites

- You have the permission *Manage Category Tree*.
- You have the permission *Add Category*.



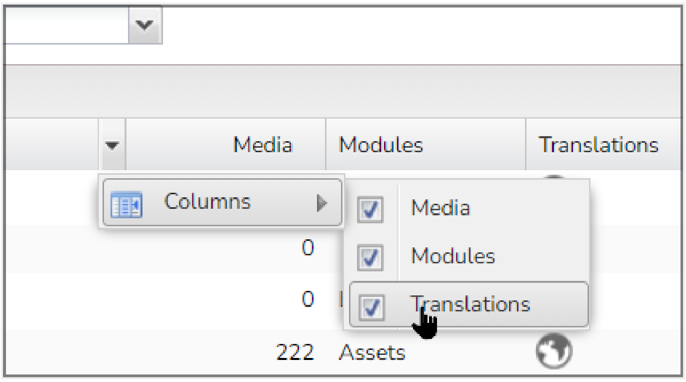
4.6.1 Categories Tree Structure

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

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

Note

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



Further functions:

Button	Description
Add	This creates a new sub-category for the selected category.
Edit	This opens a dialog box in which you can define the basic data, the access by modules, the access by users, and the access by organizational units for the category.
Delete	This deletes the selected category. The category is removed from the properties of any affected assets.

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

4.6.2 Properties of a Category

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

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

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

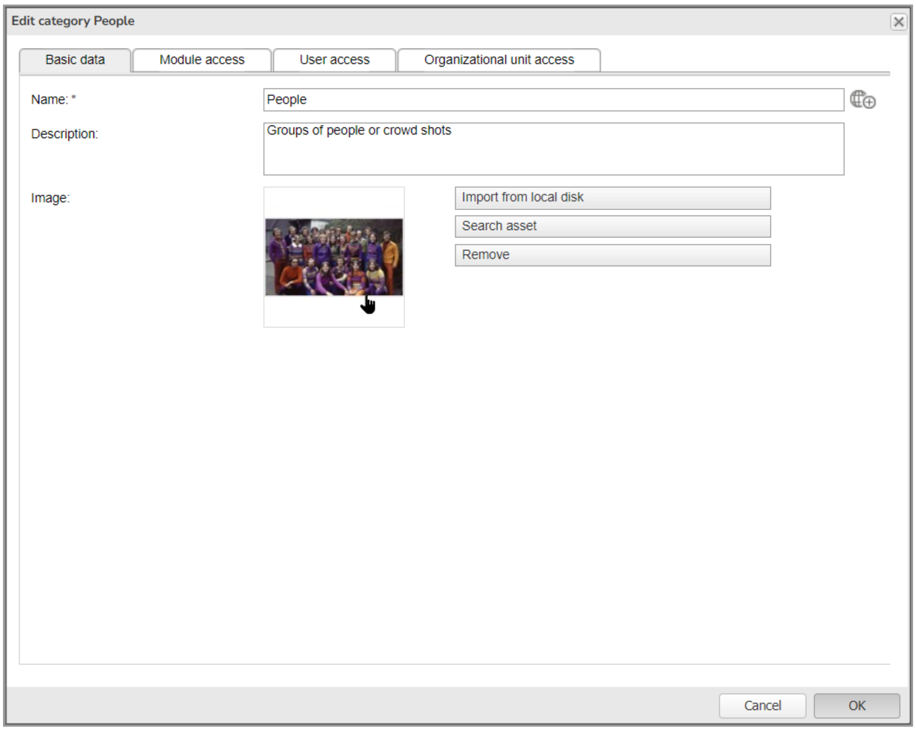
  Note: If you want to assign the category to a Smart Grid in the *Brand Template Builder* module, a preview image is mandatory.

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

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

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

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



4.6.3 Adding a Category

You want to add the *Advertising material* category to the tree structure. You want the *Advertising material* category to be visible in the *Media Pool* and *Brand Template Builder* modules. You also want to specify that the *Advertising material* category is only visible to the *Marketing* organisational unit. You then want to create the subcategories *Brochures* and *Flyers* for the *Advertising material* category. You want both subcategories to have the same visibility. You also want the *Flyers* subcategory to appear above the *Brochures* subcategory in the tree structure.

> **Note**
>
> The function for sorting the category tree individually is currently only supported in the *Media Pool* and *Brand Template Builder* modules. In other modules, the categories are displayed in alphabetical order.

Prerequisites

- You have the permission *Add Category*.
- You have the permission *Manage Category Tree*.

- The organizational unit *Marketing* has been created.

1. Click > *Administration* > *Overview* > *Data Structures & Workflows* > *Categories*.

   This opens the *Categories* overview page.

2. Highlight the entry *Categories*.

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

3. Choose *Add*.

   This opens a new dialog box.

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

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

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

    This opens a new dialog box.

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

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

4.7 Company Vacations and Public Holidays

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

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

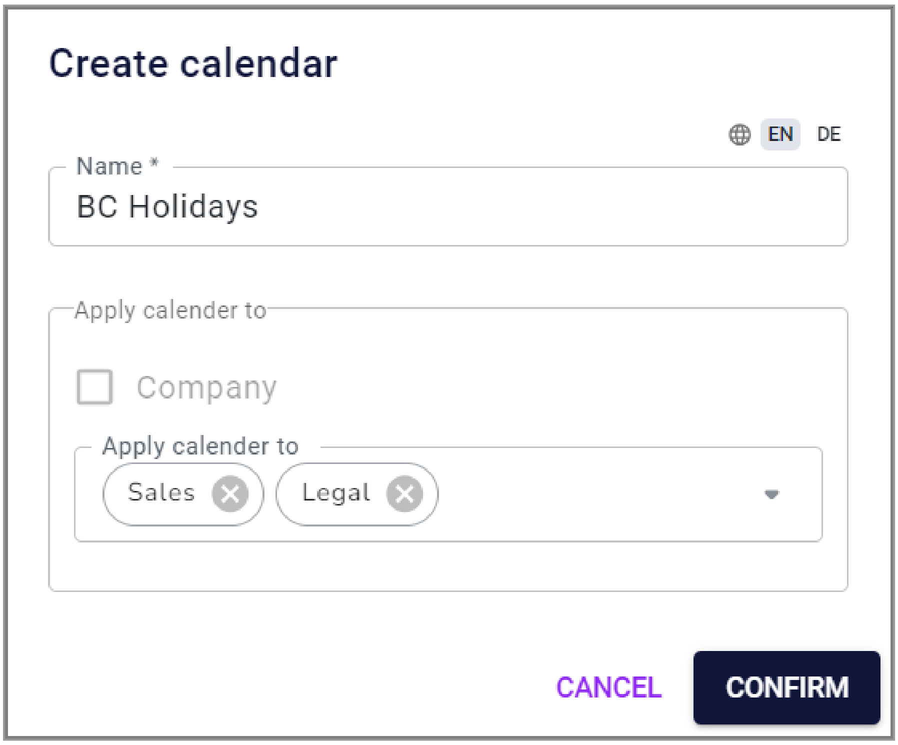
If there are already existing calendars, the first calendar from the list is automatically selected. For each user group, you can manage a calendar. Users are automatically assigned to the associated calendar if they are a member of a user group that has been mapped to that calendar. The *Select calendar*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

Create Calendar

1. Click > *Administration* > *Overview* > *User &Groups* > *Company Vacations and Public Holidays*.
2. Click *Create*.

   The *Create Calendar* dialog appears.
3. Enter a name.
4. Optional: Enter a localized name in other languages. To do so, click the globe icon.

5. In the *Apply calendar to* menu, activate the checkboxes for the user groups that should see this calendar.



6. Optional: Select the checkbox *Company* to make the calendar visible across the entire company.
7. Click *Confirm*.

You have created an empty calendar and can now manually enter company vacations and public holidays. You also have the option of importing a calendar with holidays from an external source.

Edit calendar

You can adjust the calendar settings after the initial configuration.

1. Click > *Administration* > *Overview* > *User &Groups* > *Company Vacations and Public Holidays*.
2. In the *Select Calendar* dropdown, select the calendar you want to customize.
3. Right and above the calendar, click *Settings*.
4. Optional: Edit the name or its localizations.
5. Optional: Edit the access permissions in the *Apply calender to* section.
6. Click *Confirm*.

You have edited an existing calendar.

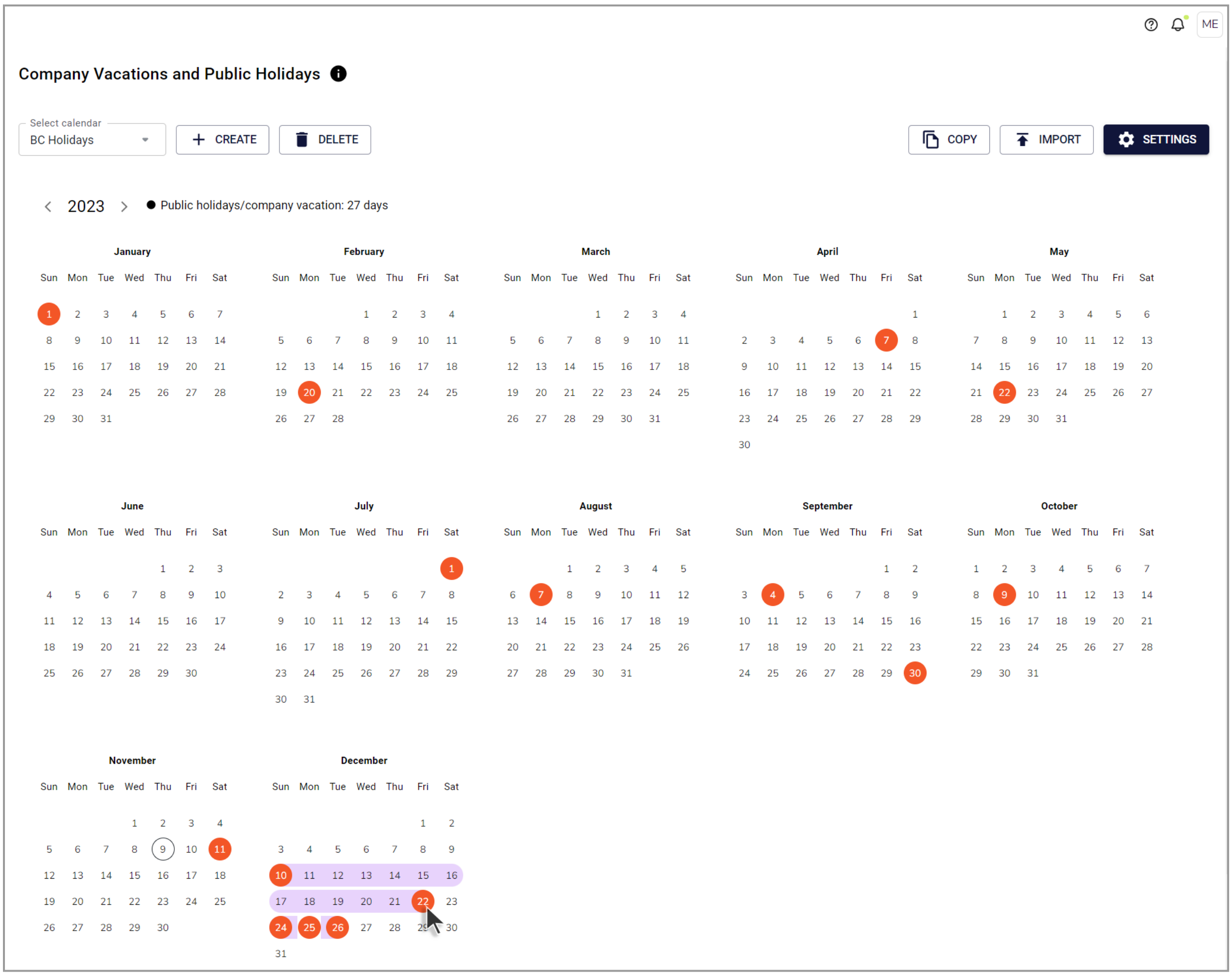
Import calendar

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

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

1. Visit a website such as Calendarlabs to access up-to-date calendar files for importing separately by country or province.
2. In the platform, click > *Administration* > *Overview* > *User &Groups* > *Company Vacations and Public Holidays*.
3. In the *Select calendar* dropdown, select the calendar to which you want to import.
4. Click *Import* above the calendar.
5. In the dialog that appears, select the file you want to import.
6. Click Open.

   The file is imported.
7. Click *Save* on the right below the calendar.



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

Note

Sometimes errors occur during the import or the calendar is apparently imported but does not show any dates in the software. This is not a system error, but probably a defective or non-standard calendar file.

You can validate if a calendar file from an external source complies with the valid standard on the official website of iCalendar. To do so, visit the following external link: https://icalendar.org/validator.html

Go there and upload the calendar file you want to validate.

Copy calendar

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

Delete calendar

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

> Attention! Data loss!
>
> Deleting a calendar cannot be reverted.

1. Click > *Administration* > *Overview* > *User &Groups* > *Company Vacations and Public Holidays*.
2. In the *Select Calendar* dropdown, select the calendar you want to delete.
3. Above calendar, click *Delete*.

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

The calendar is deleted.

5

Data Structures & Workflows

5.1 Custom Objects and Structures

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

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

Nested Custom Structures

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

Administration

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

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

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

5.1.1 Custom Structures

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

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

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

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

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

Additional configuration options for custom structures

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

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

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

Attributes

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

Name	Description
Text	This attribute is used to provide a single input line without formatting options for the custom objects.
Rich text	This attribute is used to provide a text field with formatting options (for example, bold, italics, underline, subscript, superscript, table) for the custom objects. You specify the formatting options that are available to the user by selecting an editor configuration (see Editor configuration). At minimum, the maximum number of characters for a rich-text attribute is high enough that you can fill 26 DIN-A4 pages.

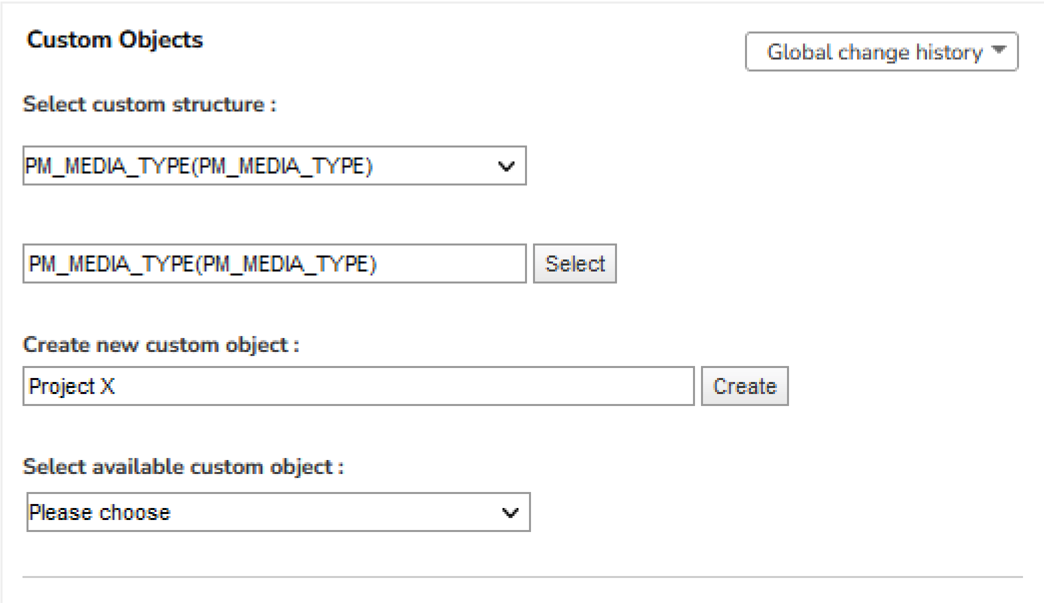
Name	Description
Image	This attribute can be used to add an asset from the Media Pool or a locally saved image to a custom object. Activate the checkbox *Use this image for custom object selection* to use the object as a dropdown in a template in *Brand Template Builder* module. Note: The checkbox can be used only for the first image attribute.
Date	This attribute is used to provide a date field with a date picker for the custom objects.
Floating point number	This attribute is used to provide an input field for floating point numbers for the custom objects.
Whole number	This attribute is used to provide an input field for whole numbers for the custom objects.

Attention

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

5.1.2 Custom Objects

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



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

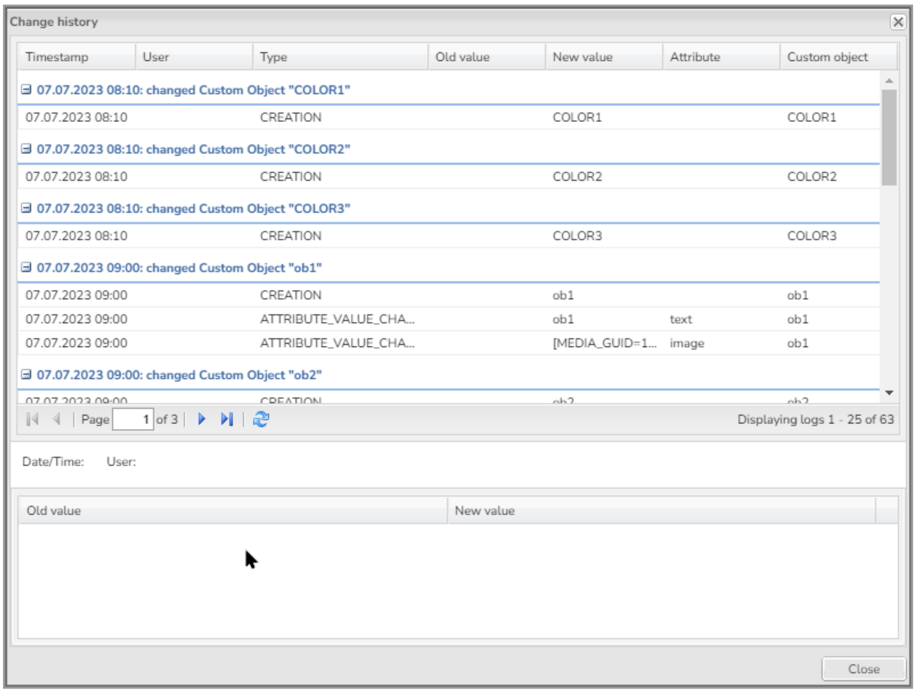
Name	Description
Available for New and Edit	The custom object can be used in new and in existing documents.
Only available for editing	The object cannot be used for new documents. The object is displayed for existing documents if it was already selected before this status was set. If the selection is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

5.1.3 Change History

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

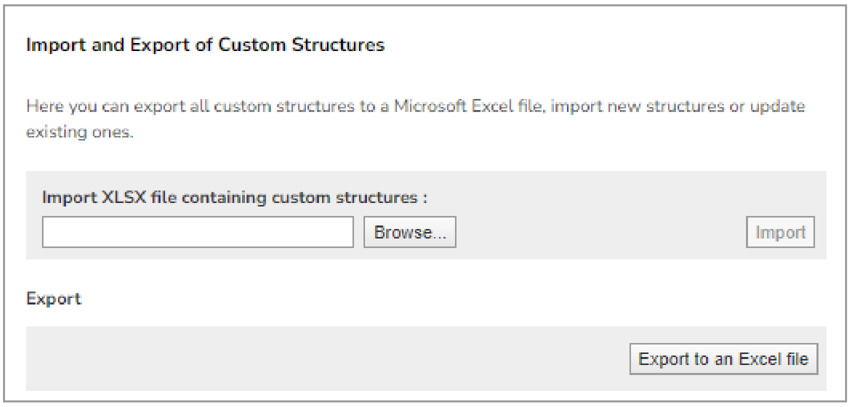
- *Global change history*: This calls the change history of all the custom objects for every custom structure. Options: *Show last 30 days*, *Show last 6 months* and *Show all*.
- *Change history*: This calls the change history of the selected custom object.

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



5.1.4 Import and Export

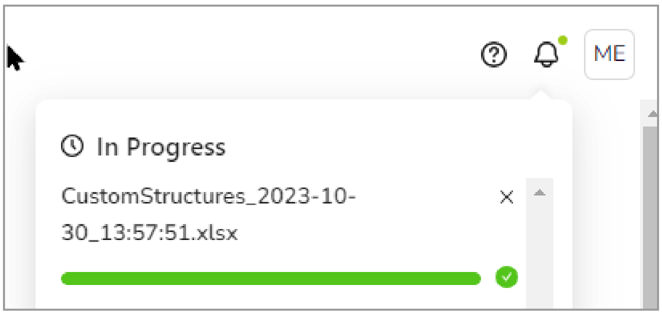
You can export custom objects and structures as an XLSX file and import an edited file again. Navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Import & Export*.



How It Works

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

When the export is complete, a green checkmark appears after clicking the bell icon in the header of the application:



After the export is complete, the file will be downloaded automatically. You'll find it in the Downloads folder of your browser.

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

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

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

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

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

Data Sheet *structures*

For more information, refer also to the chapter *Custom Structures* on page 77.

Column	Description
List ID	The name of the custom structure, which must not be changed.
List name	The displayed name for the custom structure, in the following notation: • Monolingual entry: {"default":nnnn"} • Multilingual entry: {"default": "nnnn1", "de-de": "nnnn2", "it-IT":"nnnn3","fr-FR":"nnnn3"}
Type	The type of the custom structure: DEFAULT or SYSTEM
Parent list ID	List ID of the parent structure
Default entry name	Default object
Affiliate type	Affiliate type: • NON_AFFILIATE_STRUCTURE: not an affiliate structure • SINGLE_OBJECT_AFFILIATE_STRUCTURE: affiliate structure with 1 object • MULTI_OBJECT_AFFILIATE_STRUCTURE: affiliate structure with multiple objects
Show preview for list entry	Property *Use this image for custom object selection:* VALUE_MEDIA_XX is entered; in this case, XX is replaced by the number of the image attribute used in the selection (see the next line)

Column	Description

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

Data Sheet *objects*

For more information, refer also to the chapter *Custom Objects* on page 79.

Column	Description
List ID	ID of the custom structure to which the object is assigned
Name	Unique name of the custom object

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

5.1.5 Examples

5.1.5.1 Creating a Custom Structure

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

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

Prerequisites

- You have the permission *Manage Custom Objects*.
- You have the permission *Manage Custom Structures*.

Creating a Custom Structure

Part 1

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

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

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

   Note: You can change the entered (technical) Name if required. Umlauts and special characters cannot be used.
6. Leave the *Upper structure*, *Branch office*, and *Default object* dropdown lists empty.
7. Enter *Postal_address* in the *Add new attribute* input field.
8. From the dropdown list next to the input field, select the entry *Rich text*.

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

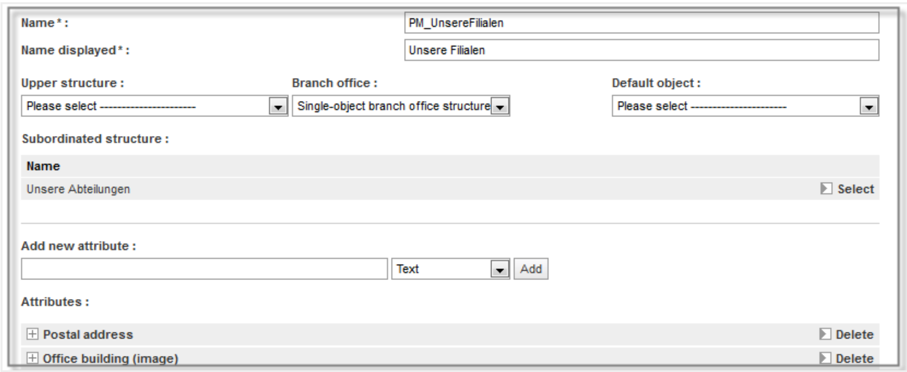
9. Click *Add*.

   You have created the attribute *Postal_address*.

   Note: You can use the *Position* input field to define the order of the attributes. The attribute with the position 1 is displayed in the highest position. Click the *Plus* sign for an attribute to display the *Position* input field.

10. Repeat steps 7 to 9 for the attribute *Website*.
11. Repeat steps 7 to 9 for the attribute *Phone number*. Select the entry *Text* in step 7 for the *Phone number* attribute.
12. Click *Save*.

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



Part 2

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

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

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

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

3. Click *Select*.

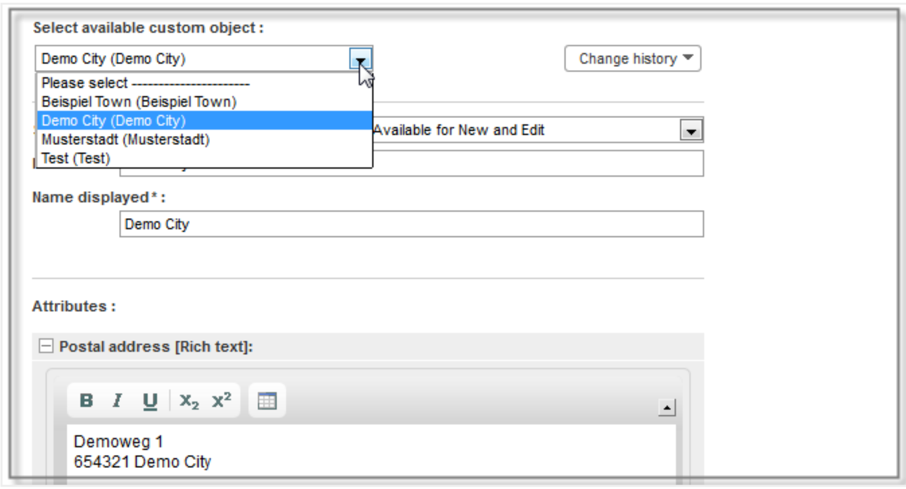
   The *Create new custom object* input field is displayed.

4. Enter the affiliate *Sample City* in the *Create new custom object* input field.
5. Click *Create*.

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

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

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



5.1.5.2 Using a Custom Structure as a Data Source

5.1.5.2.1 Assigning a Custom Structure as a Data Source

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

Prerequisites

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

1. Click > *Administration* > *Overview* > *Datasheet Engine* > *Types*.
2. Search the type *Special promotions - affiliates*.
3. On the right in the line of the type, click the pencil icon.

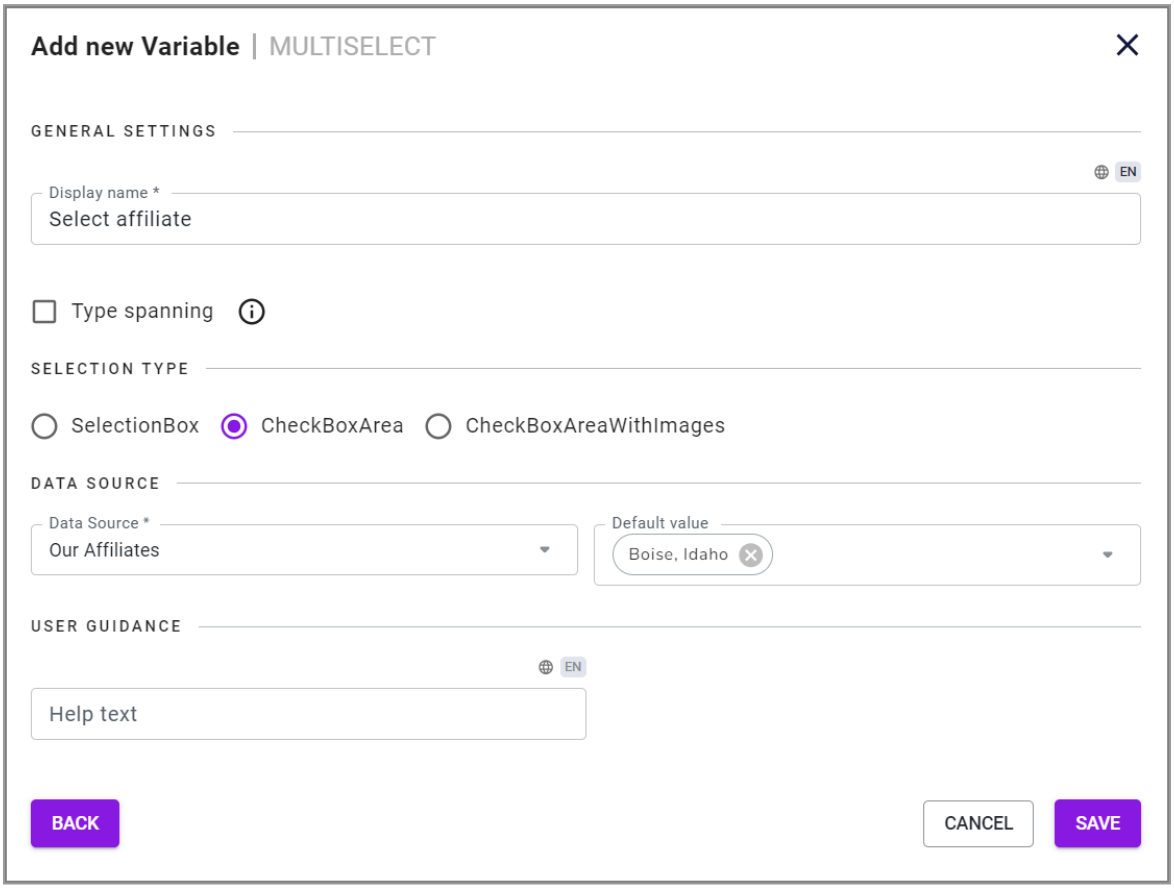
   The details dialog of the type is displayed.
4. In the ☰ dropdown in the top left corner, select *Datasheet Layout*.

   The *Datasheet Layout* page is loaded.
5. Click + *Add New Variable*.

   The *Add new Variable* dialog box opens.
6. From the *Type* dropdown list, select the entry *multiselect*.

   The input fields required to create the variable are displayed.
7. Enter the name that you want to use to display the dropdown list on the data sheet (for example, *Select affiliate*).
8. In the *Selection Type* section, select *CheckBoxArea*.

   Note: If you select *CheckBoxAreaWithImages*, an existing image attribute is displayed as the preview image.
9. In the *Data Source* dropdown, select the *Our affiliates* custom structure.
10. Optional: Select a default value.
11. Optional: Define whether the visibility of the multiselect variable is to be dependent on a different variable.
12. Click *Save*.



You have created a multiselect variable for the datasheet and defined the custom structure *Our Affiliates* as its data source. The *Select Affiliate* multiselect is displayed in the list of available variables to the right below *Settings Layout* on the *Datasheet Layout* page.

13. Place the multiselect variable on the datasheet:

    a. Navigate to the tab on which you want to place the multiselect variable.

    b. Drag and drop the *Select affiliate* multiselect variable onto the datasheet.
    Note: A dashed line assists you while placing the multiselect.

    c. Click *Publish Changes* in the top right corner.

    d. Click ✕ to close the datasheet.

You have assigned the custom structure as a data source to the job type.

5.1.5.3 Connecting a Custom Structure to a Template

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

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

Prerequisites

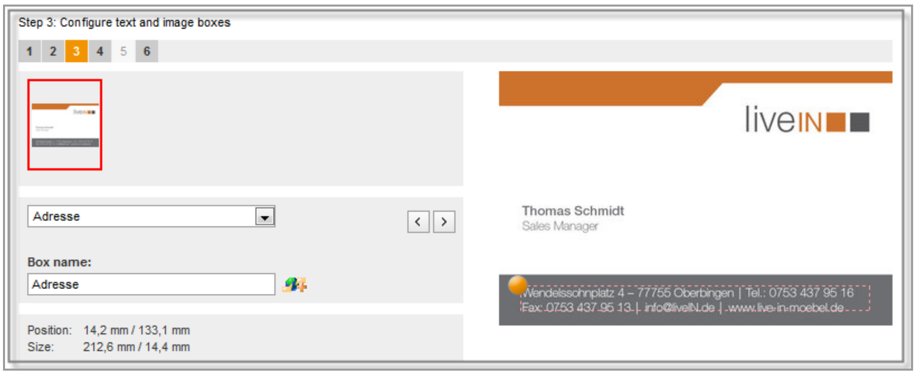
- You have the permission *Module Access* for *Brand Template Builder* module.
- You have the permission Access Template Operations for accessing the template design functions in *Brand Template Builder* module.
- You are authorized to edit existing templates in *Brand Template Builder* module (using the permissions *Edit All Templates* or *Edit Own Org Templates*, for example).
- A suitable template is available. For the contact information, text boxes for the *Postal address*, *Website*, and *Phone number* have been created in the template.

Connecting a Custom Structure to a Template

Step 3 of Template Design: Configuring Text and Image Boxes

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

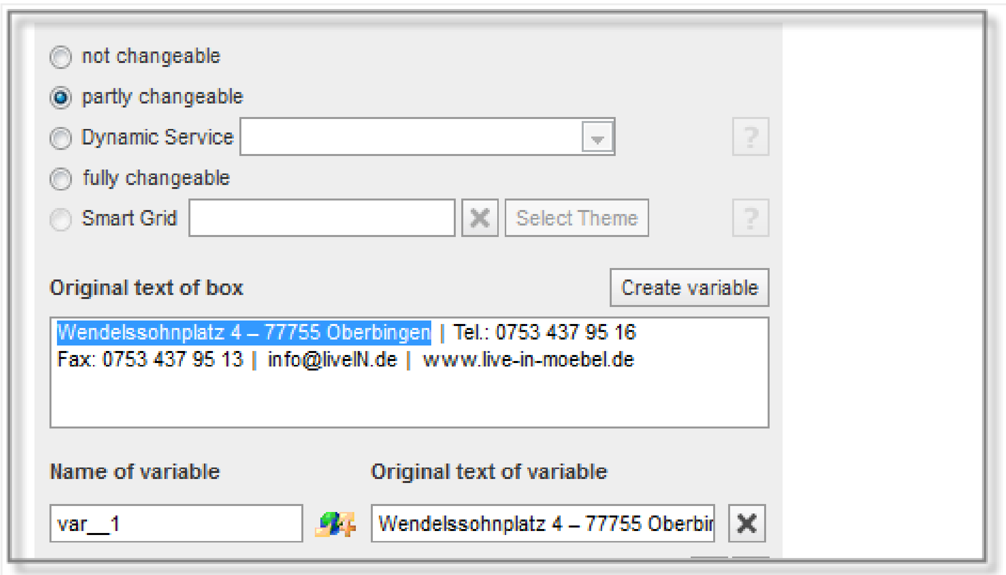
   The box that is currently selected is highlighted in color in the preview image in the pane on the right.



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

   Note: You can only select single-line text passages.
7. Click *Create variable*.

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



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

This brings you to Step 4 in the template design.

Step 4 of Template Design: Assigning Alternative Images and Text Suggestions to Boxes and Placeholders

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

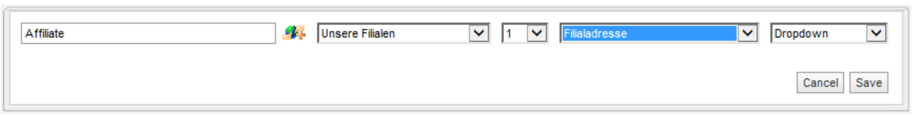
   The original text is loaded to the text field in the *Content type selection* area.
2. In the *Apply structure and attribute* area, click the arrow icon.

   This opens the *Template dropdowns* dialog box.

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

   This opens the *Manage dropdowns* dialog box.
4. Click *Add new dropdown*.

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

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

6. Click *Save*.

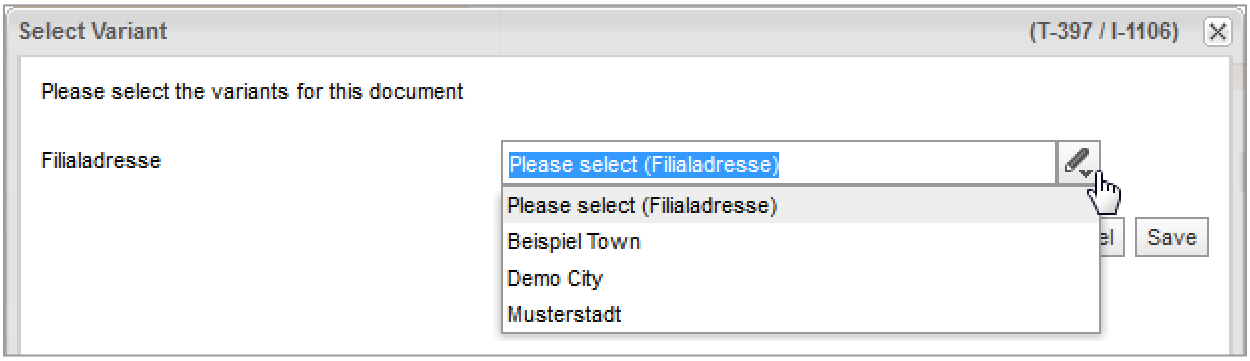
   You return to the *Manage dropdowns* dialog box.

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

   You return to the *Template dropdowns* dialog box.

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

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



5.1.5.4 Nesting Custom Structures

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

Prerequisites

- You have created the *Our affiliates* custom structure.
- You have the permission *Manage Custom Objects*.
- You have the permission *Manage Custom Structures*.

Nesting Custom Structures

Creating the *Our Departments* Custom Structure and Its Attributes

1. Navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Structures*.
2. Enter *Our_departments* as the name in the *Add new structure* input field.

   Note: You can also change the name and the displayed name for the custom structure at a later stage.

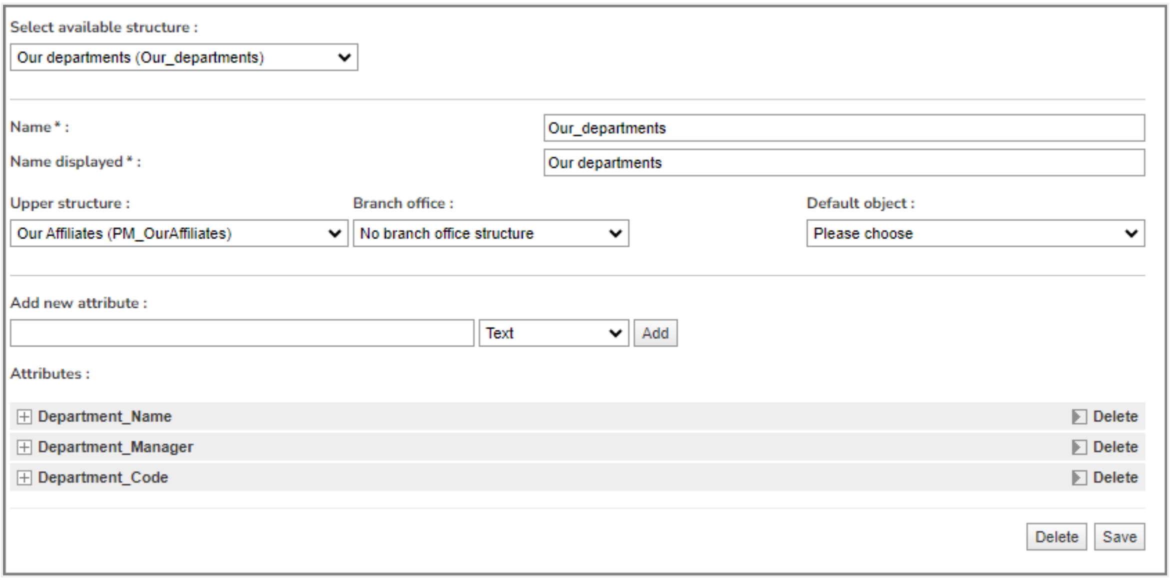
3. From the dropdown list next to the input field, select the entry *Default*.
4. Click *Add*.

   You have created the *Our_departments* custom structure and loaded it to the *Select available structure* dropdown list.

5. From the *Upper structure* dropdown list, choose the entry *Our affiliates*.
6. Click *Save*.

   You have assigned the *Our departments* custom structure as a child of the *Our affiliates* structure.

7. Add the *Department name*, *Department manager*, and *Department code* to the structure as text attributes.

8. Click *Save*.

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

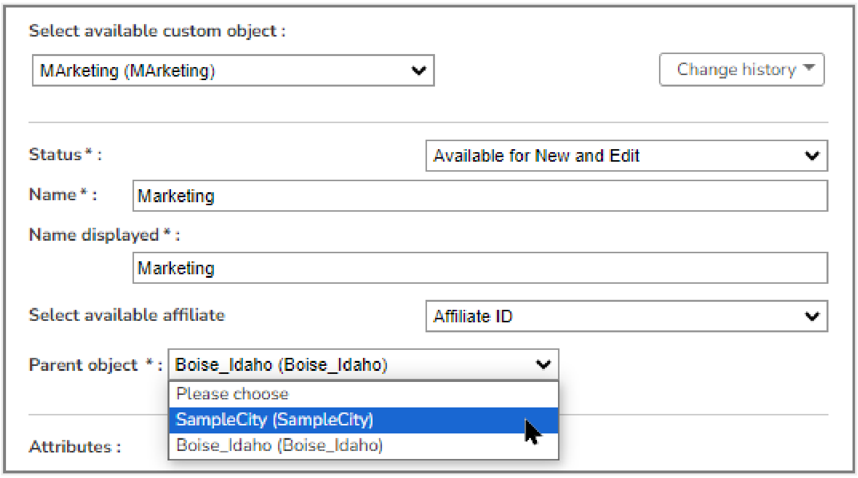
Creating and Assigning Custom Objects for the Our Departments Structure

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

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

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

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

8. Enter the information for the attributes *Department name*, *Department manager*, and *Department code* in the input fields.
9. Click *Save*.

10. Repeat steps 5 to 9 to assign all of the required departments to the affiliate.

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

5.2 Keywords

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

> Note
>
> Bear in mind that you can also describe assets using tags. In this case, any user can enter keywords without any restrictions. The advantage is that users can characterize assets easily and individually. The disadvantage is that this can result in a large number of keywords without any kind of system, and the keywords can be used in different ways. You can use both tags and keywords at the same time. However, this cancels out the advantages of each. Uptempo therefore recommends that you only use one of the methods.

5.2.1 Create New Keywords

Create a Single Keyword

1. Navigate to > *Administration* > *Overview* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

2. At the bottom of the overview, click *New keyword*.

   A second browser window *Manage keywords* opens.

3. Enter the keyword.
4. Optional: Click and enter a translation in the fields for all needed language versions.
5. Click *Save*.

The keyword has been created and can be used immediately.

Create Multiple Keywords

1. Navigate to >*Adminstration* > *Overview* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

2. Click *Several keywords* at the bottom of the overview.

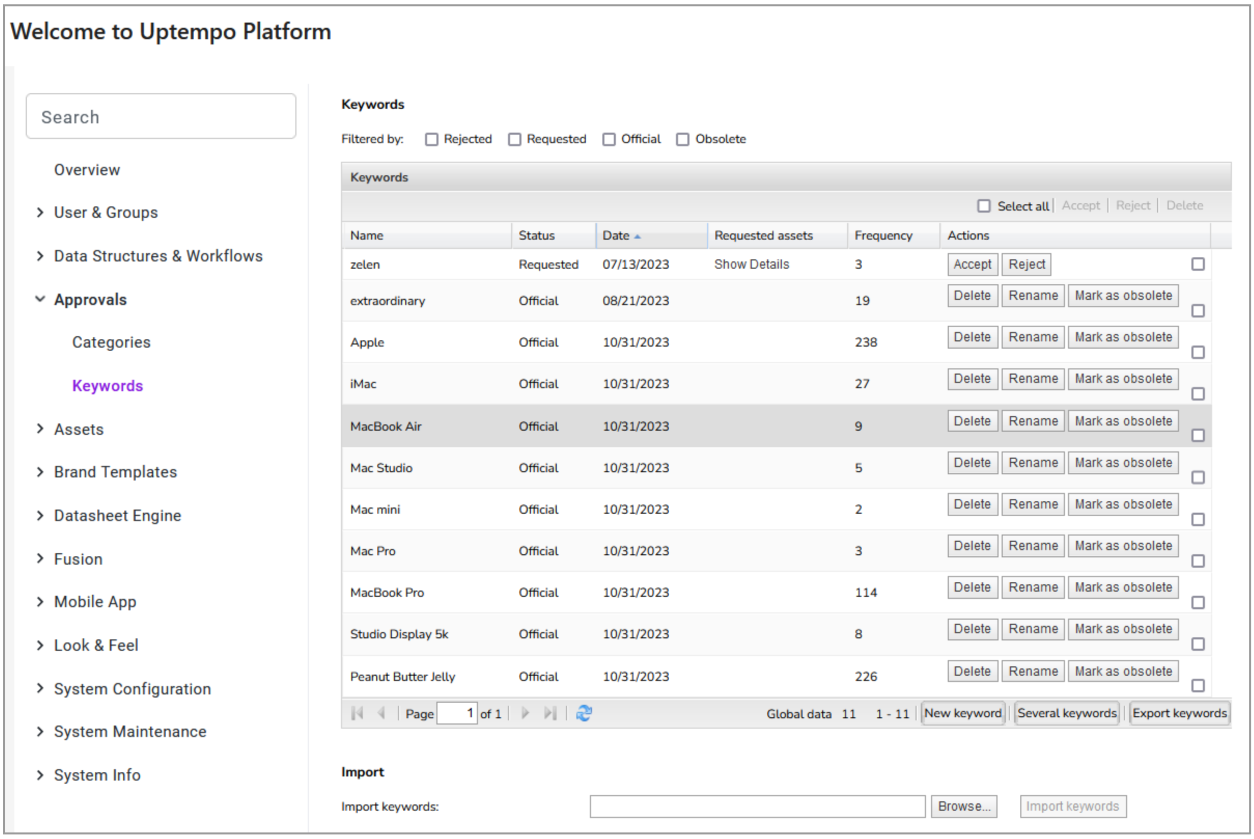
   A second browser window *Manage keywords* opens.

3. Enter the keywords and press Enter after each keyword.
4. Optional: Click  and enter a translation in the fields for all needed language versions.
5. Click *Save*.

The keywords have been created and can be used immediately.

5.2.2 Overview of Keywords

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



Description of the Overview Columns

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

Actions

Filtered by	Actions
Rejected	Approve, Delete
Requested	Accept, Reject
Official	Delete, Rename, Mark as obsolete
Obsolete	Delete, Reactivate

5.2.3 Process Keyword Request

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

1. Navigate to > *Administration* > *Overview* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

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

   Only the requested keywords are displayed.

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

5.2.4 Rename Keyword

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

1. Navigate to> *Administration* > *Overview* > *Approvals* > *Keywords*

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

The keyword is renamed.

5.2.5 Deactivate Keyword

You can set a keyword to *Obsolete*, which deactivates it. You can no longer assign it, but you can still use it as a search criteria in the advanced search. It can also be reactivated at any time.

1. Navigate to > *Administration* > *Overview* > *Approvals* > *Keywords*.

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

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

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

5.2.6 Deleting a keyword

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

1. Choose > *Administration* > *Overview* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

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

   A confirmation prompt opens.

4. Click *OK*.

The keyword is deleted.

5.2.7 Export and Import

5.2.7.1 Export Keywords

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

1. Navigate to > *Administration* > *Overview* > *Approvals* > *Keywords*.

   An overview of the keywords opens.

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

An Excel file has been created and saved to your browser's default download folder.

5.2.7.2 Structure of the Keyword Export

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

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

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

5.2.7.3 Import Keywords

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

1. Choose > *Administration* > *Overview* > *Approvals* > *Keywords.*

   An overview of the keywords opens.

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

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

5.3 Workflows

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

You create a new workflow in > *Administration* > *Overview* > *Data Structures & Workflows* > *Work-flows*.

Prerequisites

You have the permission *Manage Workflows*.

Properties of a Workflow

When you create a workflow, you define:

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

Properties of a Workflow Step

The following settings are configured for each created workflow step.

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

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

Note

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

Note

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

Using Workflows in the Job Manager and Marketing Data Hub

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

Using Workflows in the Media Pool

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

5.4 Price Lists

Navigate to > *Administration* > *Overview Data Structures & Workflows* > *Price Lists*. You can use price lists to calculate the production costs for advertising material automatically. You can download a template for a price list in Excel format to enter the required information correctly. The following information is uploaded from the uploaded price list:

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

The overview of existing price lists provides information about:

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

Note

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

Fusion

6

This chapter summarizes topics related to the integration of the Uptempo platform with other systems.

- *Single Sign-On/SAML* on page 112
- *Keycloak Authentication* on the facing page
- *Registered Apps* on page 116
- *MBI — Message Based Integration Service* on page 119
- *UX Logic* on page 120

6.1 Keycloak Authentication

The internal authentication method has been switched system-wide from Basic Authentication over to the OAuth2 standard completely.For this purpose, Uptempo uses KeyCloak authentication for communication between software modules, software containers, etc. – i.e. Keycloak acts as a secure and robust identity provider (IdP).

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

This transition includes the following functions:

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

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

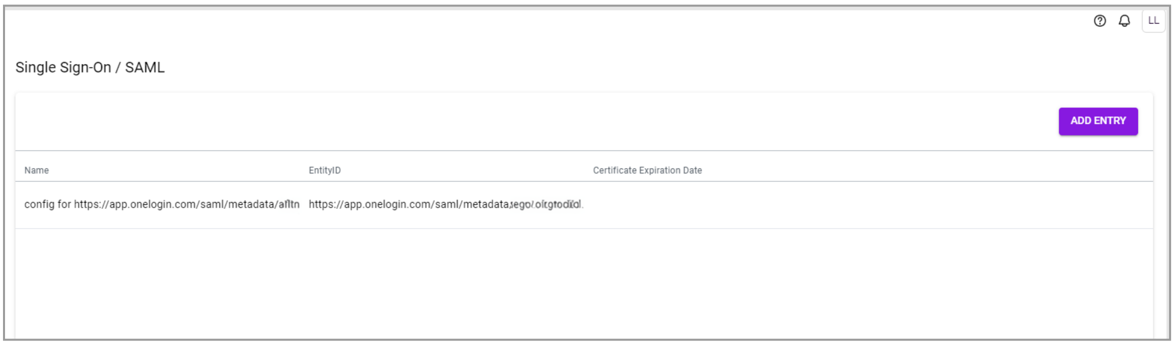
6.2 Single Sign-On/SAML

On the > *Administration* > *Overview* > *Fusion* > *Single Sign-On / SAML* page, you configure the Uptempo platform as a service provider for logging on using SSO via SAML. You can create configurations for logging on using multiple identity providers. To access the separate SSO/SAML Technical Description Guide, contact your Uptempo representative for the latest release.

Create Configuration

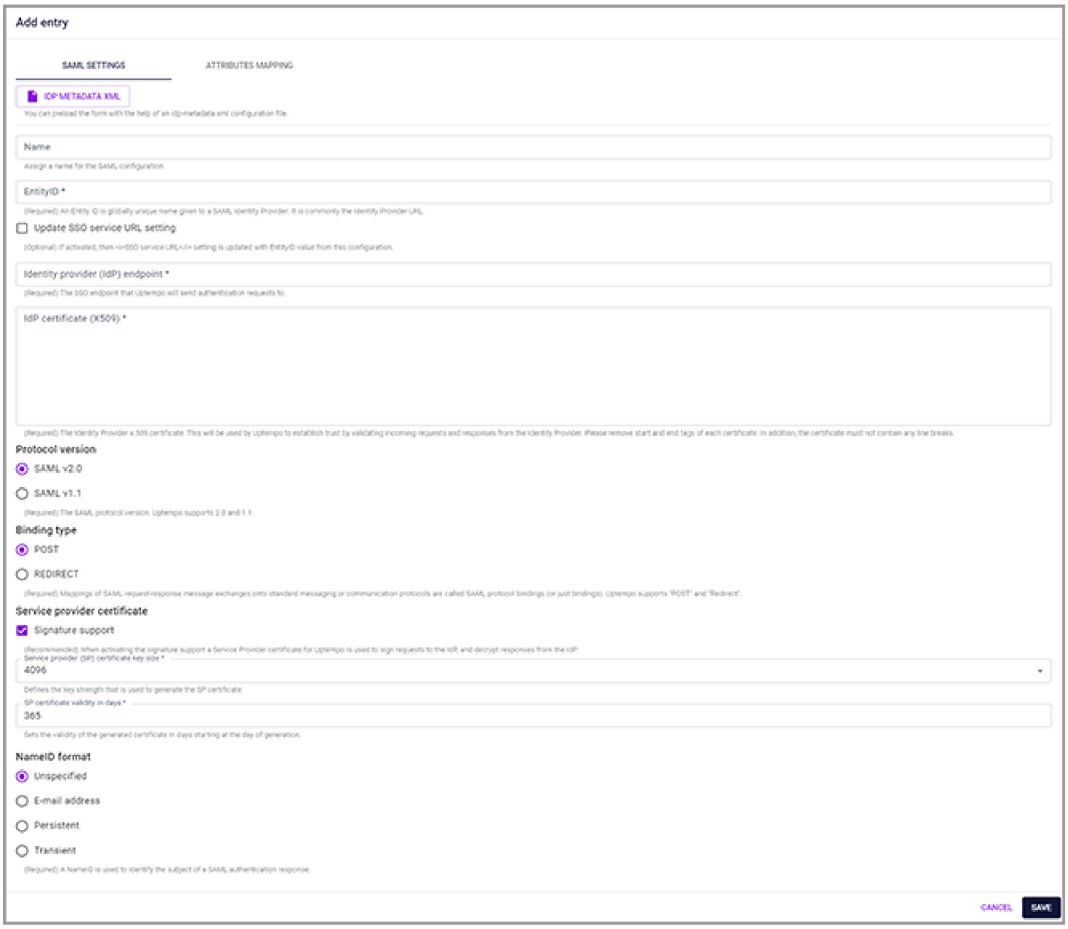
1. Choose > *Administration*> *Overview* > *Fusion* > *Single Sign-On / SAML*.

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

2. Click *Add Entry*.

   The *Add Entry* dialog is displayed with the *SAML Settings* tab:



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

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

   - Name: Enter a name for the new configuration.
   - *Configuration name (EntityID):* Enter the entity ID of your identity provider. An entity ID is the globally unique name for an SAML identity provider. This is usually the identity provider URL.
   - *Identity provider (IdP) endpoint*
     Enter the full URL that your identity provider uses to receive SSO messages.
   - *IdP certificate (X509)*
     Enter the public key certificate of your identity provider (X.509) in PEM format.

- *Protocol version*
  Select the SAML protocol version that is used between Uptempo (SP) and your identity provider: SAML 1.x or SAML 2.0. SAML 2.0 is recommended.
- *Binding type*
  Select the transport type used between Uptempo (SP) and your identity provider: POST or REDIRECT. REDIRECT corresponds to HTTP-GET.
- *Signature support*
  Messages can be signed for security (to establish trust).
  Choose whether signature support between Uptempo (SP) and your identity provider is activated.
- *Service provider (SP) certificate key size*
  Define the key size for the service provider certificate.
- *SP certificate validity in days*
  Define the validity period for the service provider certificate in days.
- *NameID format*
  Select the NameID format. Your SAML identity provider must declare the format in its metadata.
- System settings
  Activate the Update SSO service URL checkbox if you want to avoid the manual entry in the system settings. If you activate the checkbox, the system setting is automatically updated with the data from the configuration. Note that the data of the last saved configuration is always entered in the setting.

4. Optional: If you need a mapping of your attributes to the SAML attributes of the Uptempo platform:
   a. Go to the *Attribute Mapping* tab.
   b. Select the required SAML attribute of the Uptempo platform from the drop-down list by activating the checkboxes.
   c. Click a point outside the picklist to close it.
   d. All selected attributes are displayed in the dialog.
   e. For each attribute, enter the name of the appropriate parameter in your system.
5. Click *Save*.

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

Note

If the IdP configuration changes, you may have to adjust the SAML configuration for Uptempo.

6.3 Registered Apps

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

> Note
>
> The *Register App* on the facing page section describes only the first part of the registration process. See the complete description under Uptempo Developer Portal.

You will need the following information to register:

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

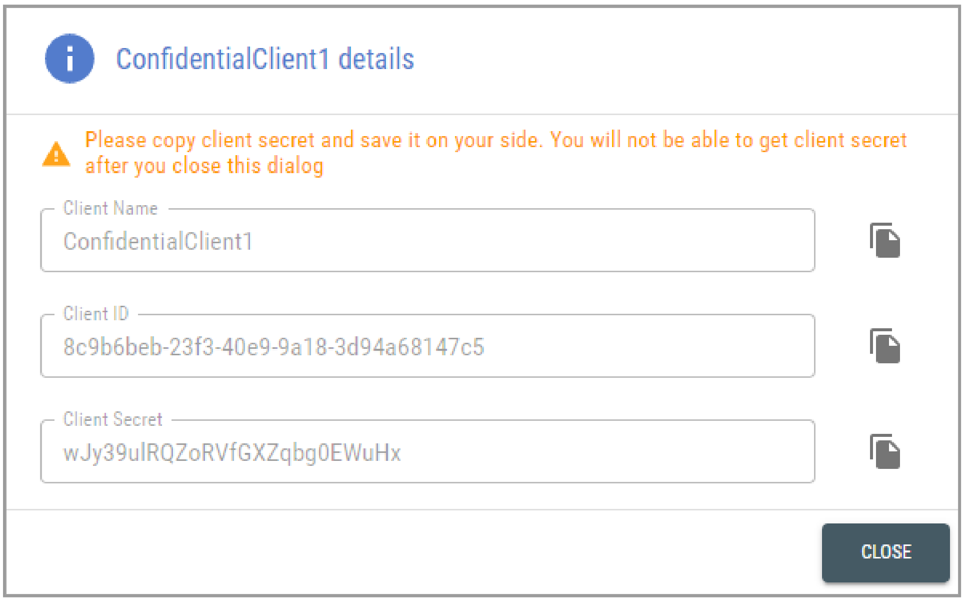
Related Actions

- *Register App* on the facing page
- *View the Registration Data* on page 118
- *Delete Registration* on page 118

6.3.1 Register App

1. Navigate to > *Administration* > *Overview* > *Fusion* > *Registered Apps*.
2. Click *Register New App*.

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



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

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

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

6.3.2 View the Registration Data

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

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

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

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

6.3.3 Delete Registration

1. Navigate to > *Administration* >*Overview* >*Fusion* > *Registered Apps*.
2. Place the cursor on the registration you want to delete in the list.

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

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

You have deleted the registration.

6.4 MBI — Message Based Integration Service

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

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

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

6.5 UX Logic

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

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

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

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

Look & Feel

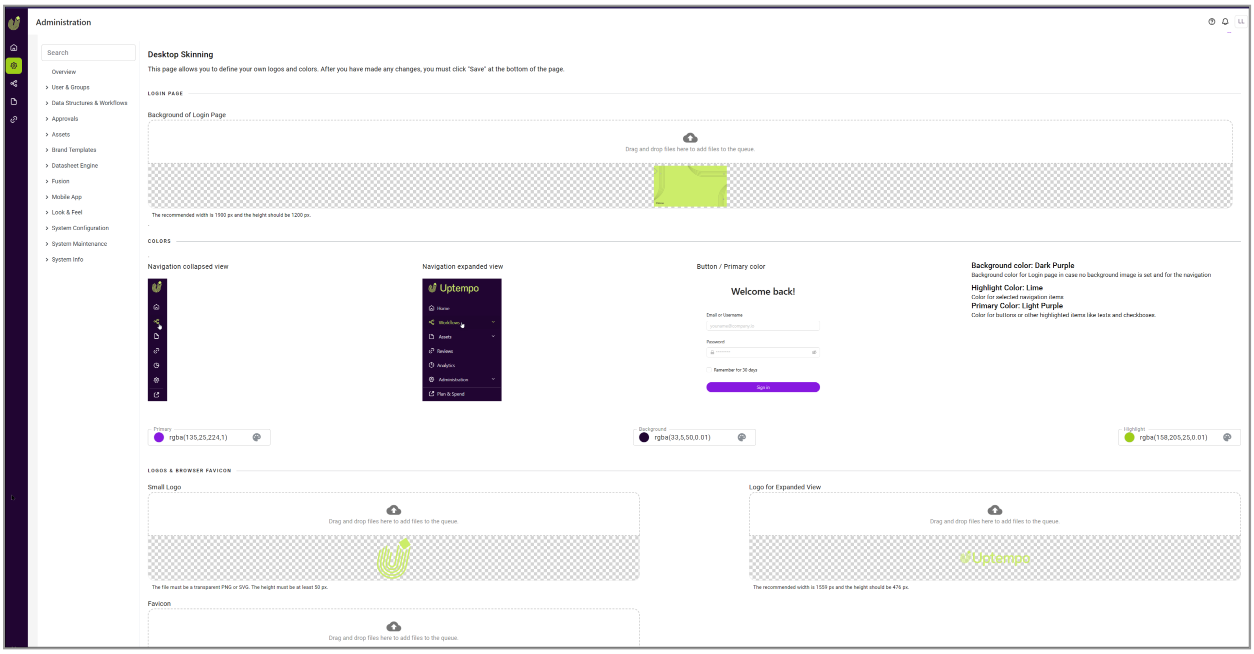
7

7.1 Desktop Skinning

As an administrator, you can update logos, images, colors, and text elements to customize the visual design/skin of both the login page and areas within the system. This allows you to match the look and feel to your brand.

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

> **Note**
>
> Clearing your browser's cache removes any stored data that could cause inconsistencies or display outdated image content. Then reload the page. This helps, if something is not displayed as expected.



Background Colors and Image

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

- Background: The background color will be the navigation background color within the system.
- Background image of login page: Upload an image that you want to be displayed as the background image on the login page. Recommended dimensions are 1900 px width, 1200 px height.

Primary Color

The primary color is used to highlight buttons and texts. The primary color is used for checkbox, and *Sign in* button on the login page . Click the palette icon to open the color picker. Note that you cannot set transparency for the primary color.

The hues for the color palette are automatically calculated from the primary color. The color for the font and icon color in the navigation is derived from the background color (white or nearly black).

Highlight Color

Here you can select the color for selected navigation items in the left sidebar and the color for text in the sidebar when you hover over them.

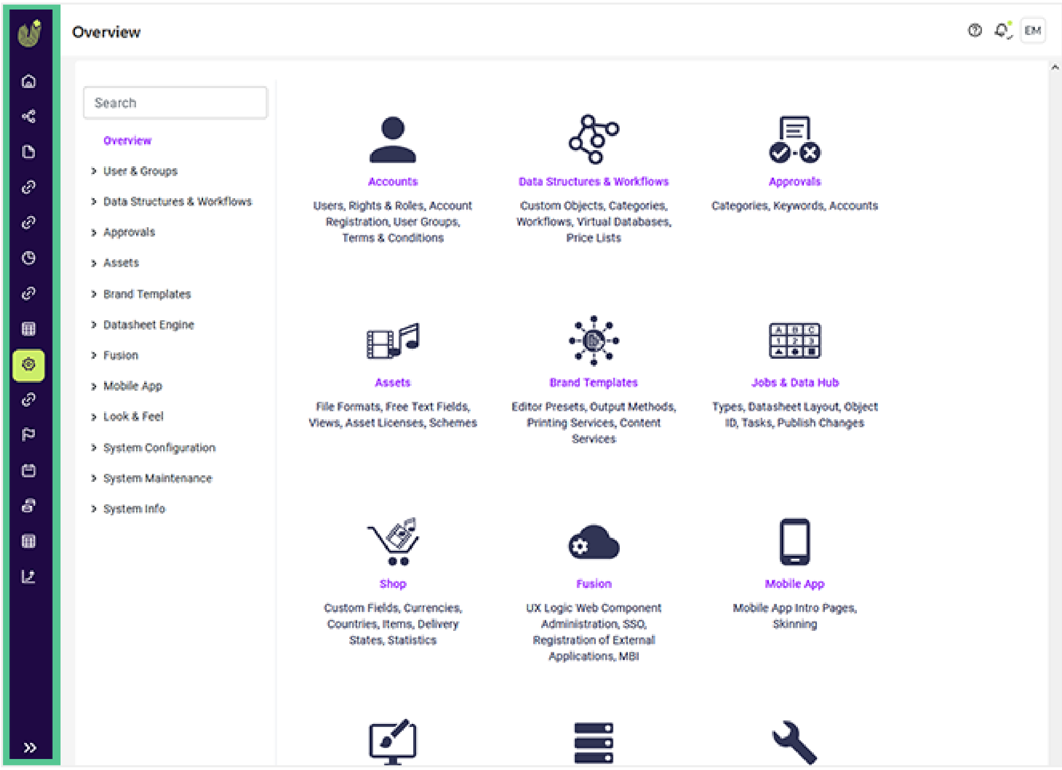
Logos & Browser Favicon

Additionally you can upload images for the following uses:

- Small Logo: The small logo is used in the collapsed view of the navigation or in the header. Once the navigation area is expanded, the logo changes to the logo for the expanded view. The file must be a transparent PNG bitmap, or preferably a vector SVG. The height must be at least 50 px. The maximum width is 150 px; for wider logos, the image will be adjusted, i.e. the height will be reduced to show the logo in full.
- Logo for Expanded view: The recommended width is 1559 px and the height should be 476 px. The file must be available in PNG format. This logo is shown when the sidebar is expanded.
- Favicon: Set the Favorite icon here. The icon must be 16 x 16 pixels and in ICO format. Click *Browse...* to select a file.

7.2 Navigation

Users can switch between the modules they have access to via the sidebar on the left:

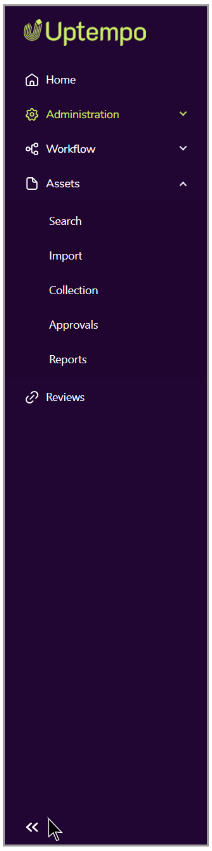


Note

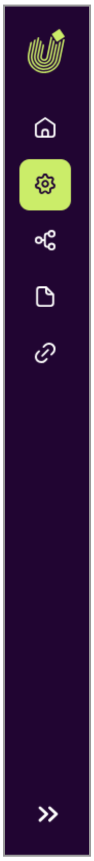
Depending on the activated modules and user access authorizations, the personal view will differ from the screenshot above.

You can use the navigation bar with the icons or switch to text view with the module names:

1. On the bottom of the navigation sidebar, click **>>** to expand from the icon view to text view.



2. On the bottom of the navigation sidebar, click **<<** to minimize the sidebar to icon view again.



You can adjust the module navigation in the following ways:

- *Changing the Order* on the facing page
- *Show and Hide Modules in the Navigation* on page 128
- *Selecting a Global Default Module* on page 129 that is displayed after logging into the system
- *Add Customer-Specific Links* on page 130 that can be used to navigate to third-party modules or other websites

Make the changes under > *Administration* > *Overview* > *Look & Feel* > *Navigation*.

Note

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

7.2.1 Changing the Order

Prerequisites

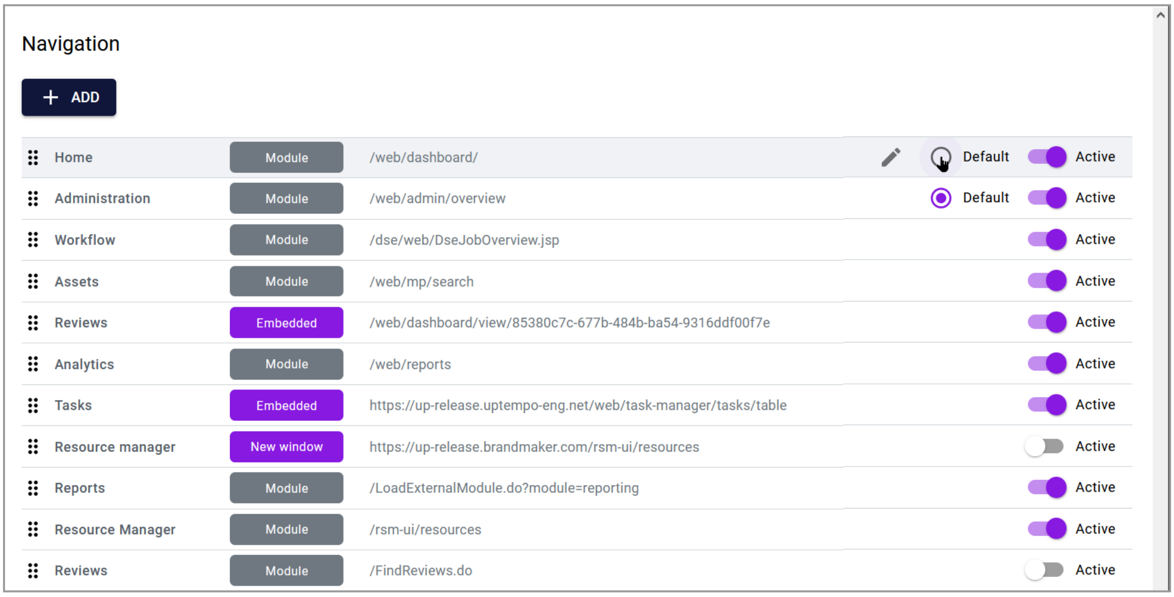
You have the permission *Manage Navigation*.

Attention

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

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *Navigation*.

   The following interface is displayed:



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

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

7.2.2 Show and Hide Modules in the Navigation

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

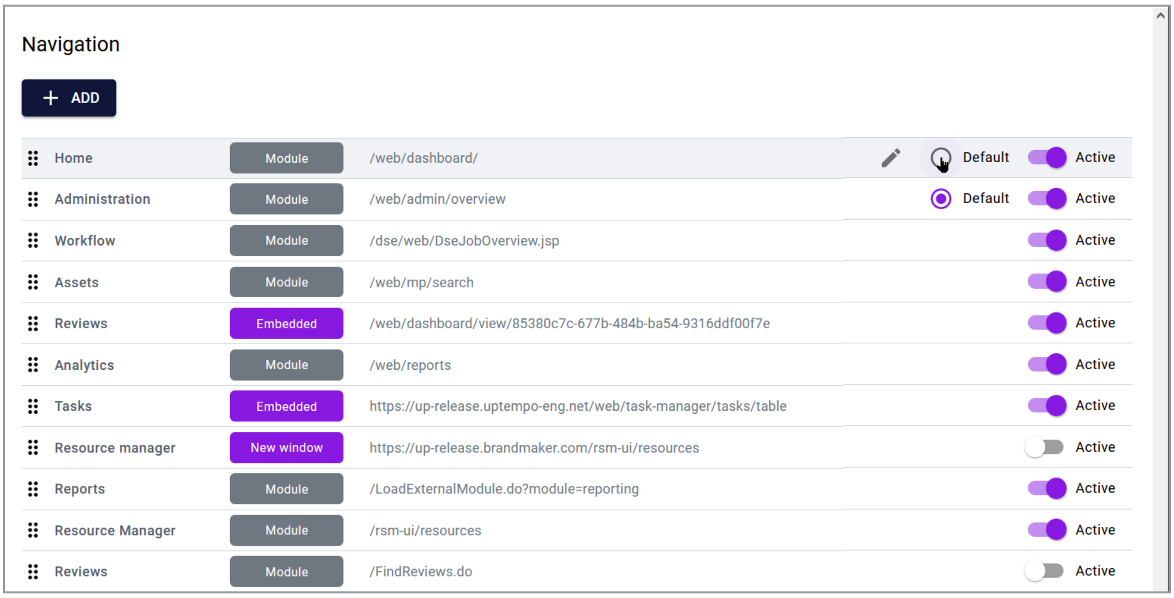
Prerequisites

You have the permission *Manage Navigation*.

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

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *Navigation*.

   The following interface is displayed:

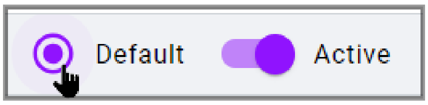
2. You can change the display by clicking the switch which says "active" in the last column of the module row:

   - Purple switch: The module is accessible in the sidebar navigation.
   - Grayed out switch: The module is not displayed in the sidebar navigation.

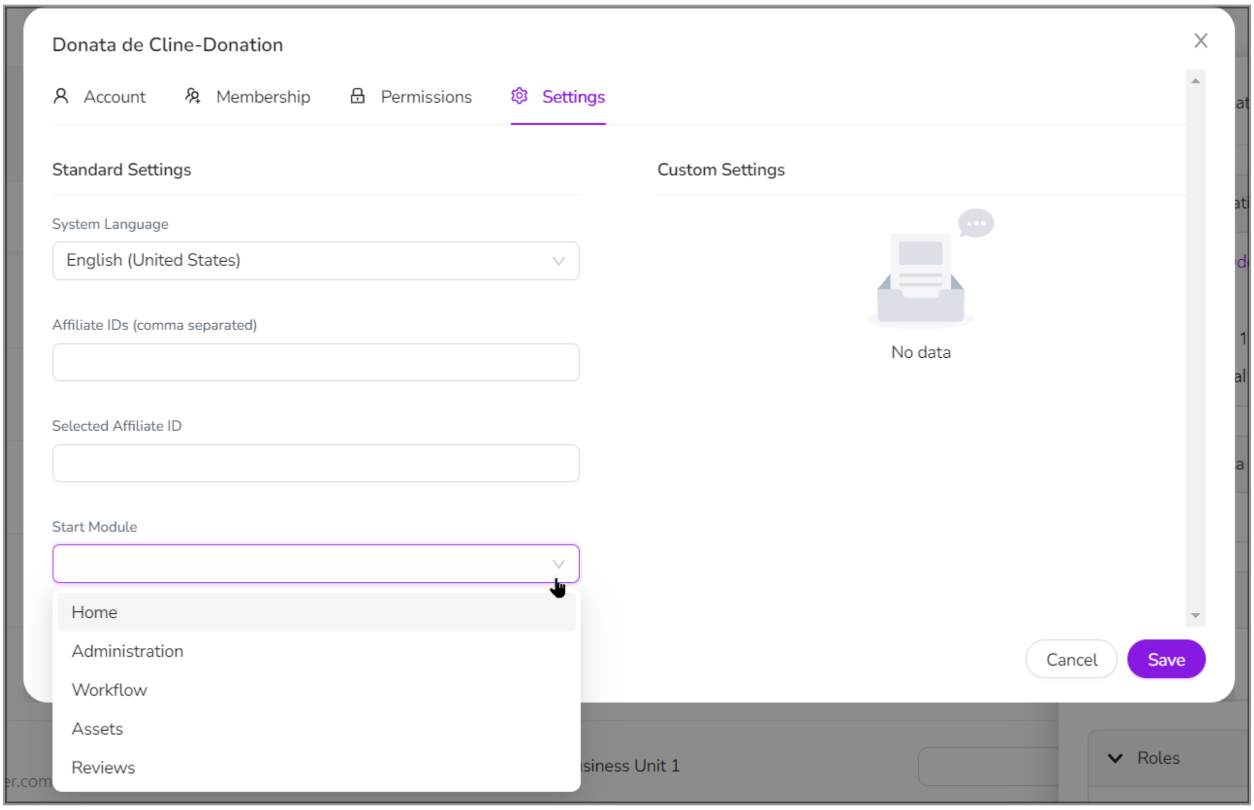
You have either added a module to the navigation or removed it. You may also need to refresh your screen to see the change.

7.2.3 Selecting a Global Default Module

The global default module is the module that is displayed to all users when they log in for the first time. You can determine the current global default module under > *Administration* > *Overview* > *Look & Feel* > *Navigation* by the *Default* entry on the right-hand side of the table.



This setting applies to all users. However, every user can configure a personal custom default module under > *Your user name* > *My Profile* > *Edit account* > *Settings* > *Start module*.

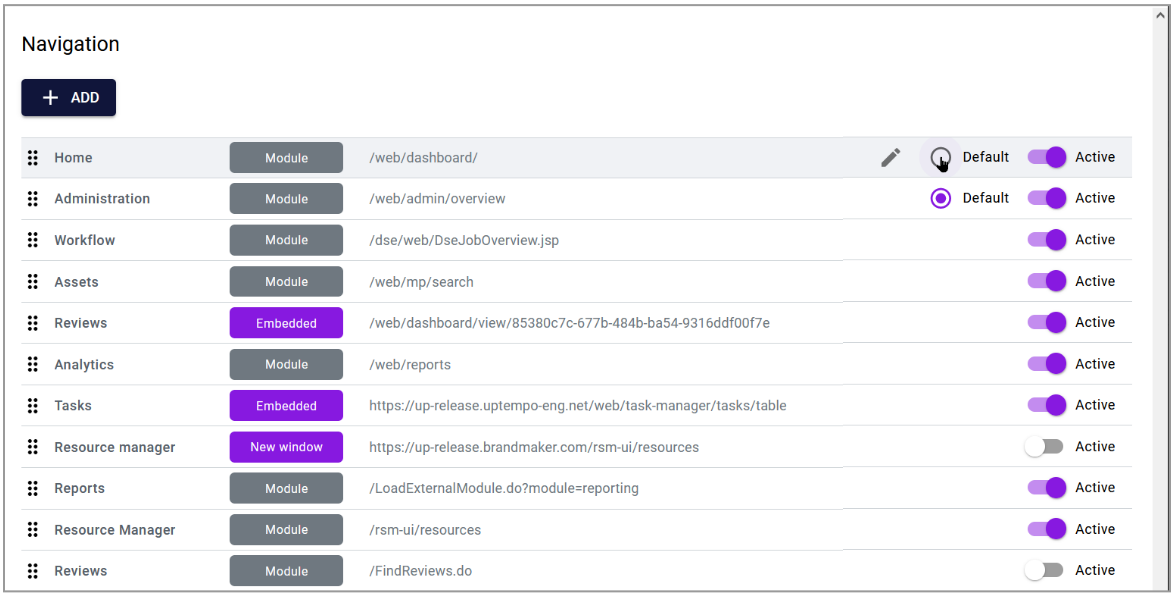


Prerequisites

You have the permission *Manage Navigation*.

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *Navigation*.

   The following interface is displayed:



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

   A gray default entry is displayed as an empty circle.

3. Click inside the circle to activate this module as new default entry..

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

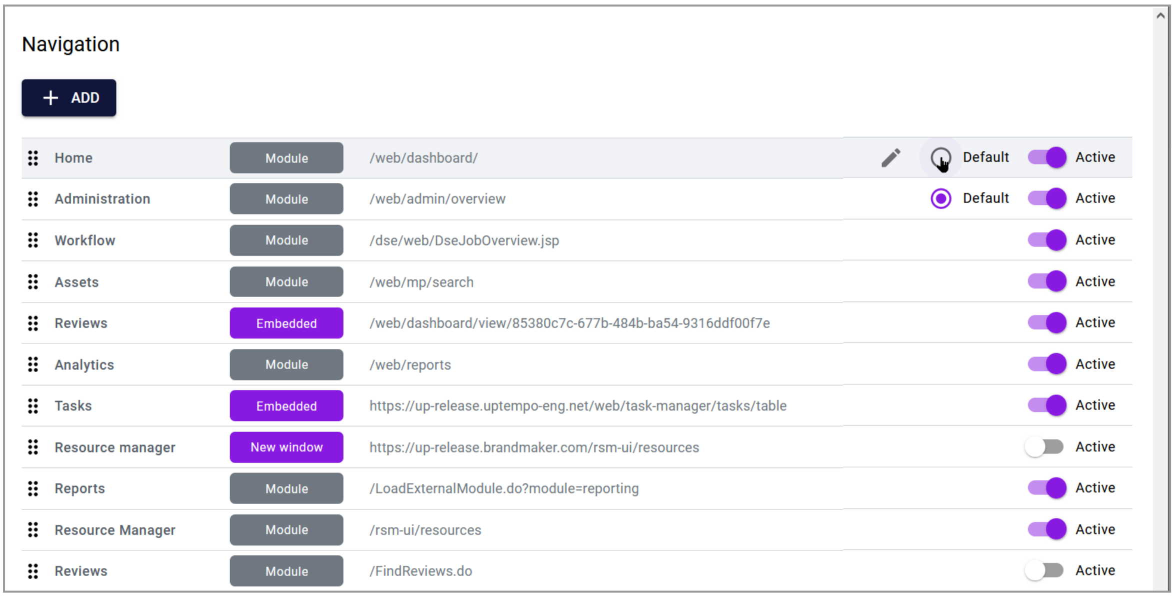
7.2.4 Add Customer-Specific Links

Prerequisites

- You have the permission *Manage Navigation*.
- You know the full URL of the object that you want to link.

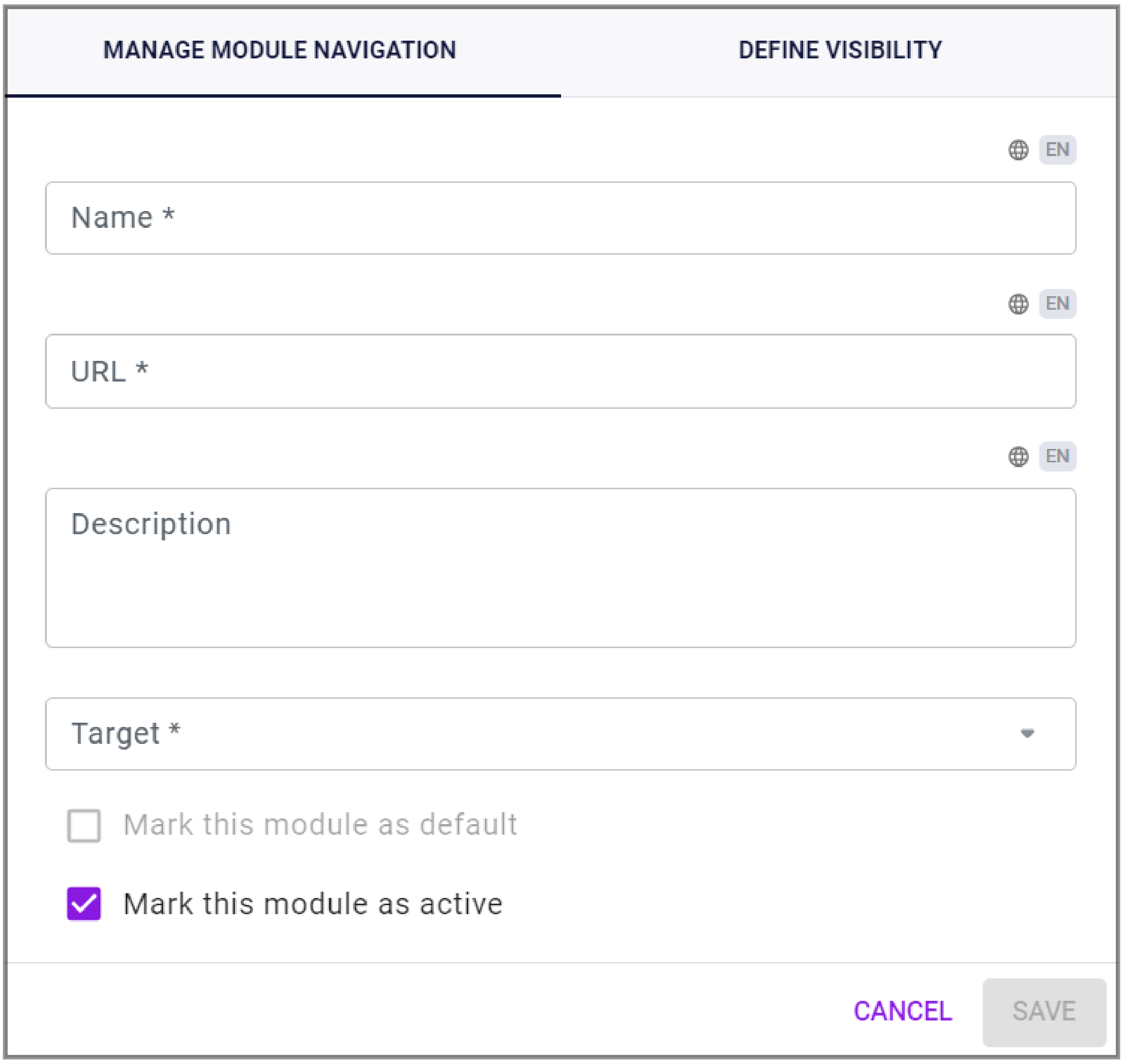
1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *Navigation*.

   The following interface is displayed:



2. Click + *Add*.

   The following dialog box is displayed:



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

   Navigation tab:

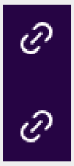
   - *Name*: Enter the name of the link. Click *Edit all languages* to add translations.
   - *URL**: Enter the full URL of the link (for example, *http://www.Uptempo.com/de.html*).
   - *Description*: Enter a short description. The description will be displayed in the top navigation under the name. Therefore we recommend a length of approx. 50 characters.

- *Target**: Select *Whole window* if you want to display the target on the current browser tab, filling the whole screen area. Select *New window* if you want to display the target on a new tab or in a new window (depending on the browser settings). If you select *Embedded*, the target is embedded on the current tab below the module navigation.
- *Mark this module as default*: Activate this checkbox if you want to define the link destination as the global default module.
- *Mark this module as active*: Activate this checkbox if you want to display the link in the module navigation.

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

4. Click *Save*.

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

> Note
>
> Each new link currently receives the same icon and individualization is not possible at the moment. Currently users must hover over each icon to read the description in a tooltip.
>
> 

7.3 Interface Text Management

You can modify the texts in the application's user interface, add your custom languages, and change the names of the application and modules.

Default Languages

The Uptempo Work includes interface texts in 12 default languages. You are free to decide which of the default languages you use in the system. For more information, see *Manage Default Languages* below.
Note that the Uptempo Plan and Spend interface texts are currently only displayed in English.

Interface Texts

Uptempo Work provides a specific wording. If you want to make changes texts, for example to implement your company's terminology, you can do so for each of the 12 default languages. For more information see *Interface Texts* on page 136.

Customer-Specific Languages

In addition to the 12 default languages, you can add up to 13 custom languages. Note that you must translate the interface texts into the custom language yourself. Also note that the system only supports left-to-right languages, such as Latin or Cyrillic fonts. Asian fonts are also displayed left-to-right. You can create custom right-to-left languages, but the system displays them left-to-right. For more information, see *Custom Languages* on page 143.

Application and Module Names

You can also change the names of applications and modules. The changed names are then used consistently throughout the system. For more information, see *Application and Navigation Names* on page 152.

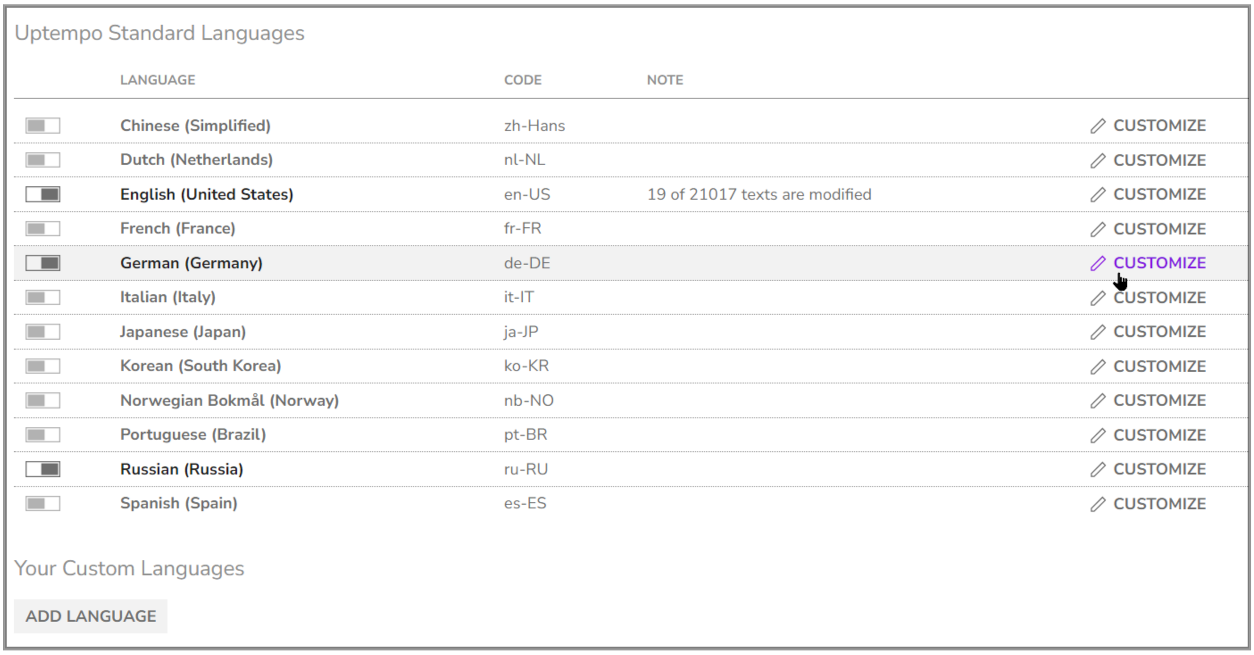
7.3.1 Manage Default Languages

The Uptempo Work Management interface texts are available in 12 languages:

> **Note**
>
> Plan and Spend can only be used with English (United States) interface.

- English (United States)
- German (Germany)
- Chinese (Simplified)
- French (France)
- Italian (Italy)
- Japanese (Japan)
- Korean (South Korea)
- Dutch (Netherlands)
- Norwegian Bokmål (Norway)
- Portuguese (Brazilian)
- Russian (Russia)
- Spanish (Spain)

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



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

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

To select a different language, a user clicks > *User name* > *My Profile*, selects *Edit Account*, chooses a different language from the *System Language* menu on the *Settings* tab and clicks *Save*.

The changed language will not switch immediately. The user must leave the current page and navigate elsewhere on the Uptempo platform. After reloading, the selected language will be effective.

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

7.3.2 Interface Texts

The Uptempo Work Management modules contain a specific wording. If you want to make changes to texts, for example to implement your company's terminology, you can do so for each of the 12 default languages. You can adjust a language under > *Administration* > *Overview* > *Look & Feel* > *UI Languages*:

Uptempo Standard Languages

LANGUAGE	CODE	NOTE	
Chinese (Simplified)	zh-Hans		CUSTOMIZE
Dutch (Netherlands)	nl-NL		CUSTOMIZE
English (United States)	en-US	19 of 21017 texts are modified	CUSTOMIZE
French (France)	fr-FR		CUSTOMIZE
German (Germany)	de-DE		CUSTOMIZE
Italian (Italy)	it-IT		CUSTOMIZE
Japanese (Japan)	ja-JP		CUSTOMIZE
Korean (South Korea)	ko-KR		CUSTOMIZE
Norwegian Bokmål (Norway)	nb-NO		CUSTOMIZE
Portuguese (Brazil)	pt-BR		CUSTOMIZE
Russian (Russia)	ru-RU		CUSTOMIZE
Spanish (Spain)	es-ES		CUSTOMIZE

Your Custom Languages

ADD LANGUAGE

How It Works

You can download the original interface texts, customize them, and then upload the file with the modified texts. When you download the interface texts, they are saved to an Excel file in XLSX format. In the spreadsheet, columns A and B are filled on the first sheet. Column A contains the keys used to assign the texts to the correct locations in the interface.

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

The corresponding text is entered in column B. You can make changes to this text. However, please note the following special features:

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

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

Once you have finished editing, save the Excel file and upload it. The system checks which texts have been changed and saves the changes. These changes take effect immediately.

If you want to make further changes, download the previously uploaded file, as it only contains the changed texts. You can supplement these with additional, modified interface texts. Please note *Adjusting Other Interface Texts* on page 140. If you want to reset the changes, delete the file with the changes. The system will then use the original texts again. For more information, see *Resetting Changes* on page 142.

During a System Update

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

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

- *Interface texts are added*: If new texts are required, they are added to the original interface texts. If necessary, you can adapt the new texts as described in *Adjusting Other Interface Texts* on page 140 and add them to existing changes.
- *Existing interface texts change, but you haven't changed these interface texts in your system*: In this case, too, there is no need for you to act; the changes will be automatically displayed in your system.
- *Existing interface texts change and you had already changed these interface texts in your system*: In this case the changes are saved in the original interface texts, but your changed texts are still used. Check your changes to determine whether you need to make any adjustments.

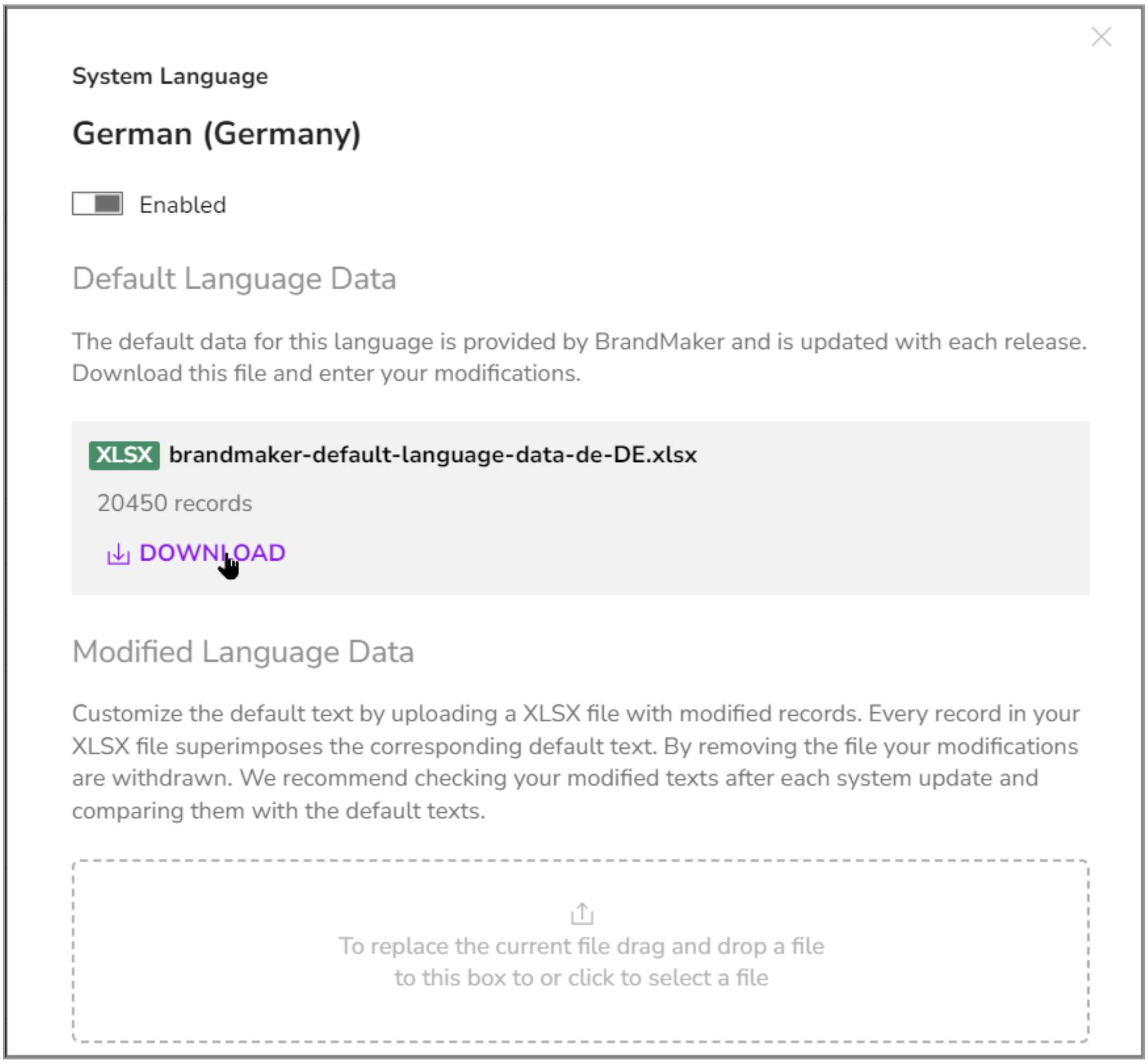
Related Tasks

- *Adjusting Interface Texts* below
- *Adjusting Other Interface Texts* on page 140
- *Resetting Changes* on page 142

7.3.2.1 Adjusting Interface Texts

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

   A dialog box will slide in on the right side.



3. Click *Download* to download the interface texts.
4. Locate the download in you browser's download folder and open the Excel file.
5. Search for the texts you want to adjust and change the texts accordingly.
6. Save and close the Excel file with your changes.
7. Switch back to the system. If you have closed the Customize dialog box, open it again by clicking on *Customize* in the line of the default language.

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

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

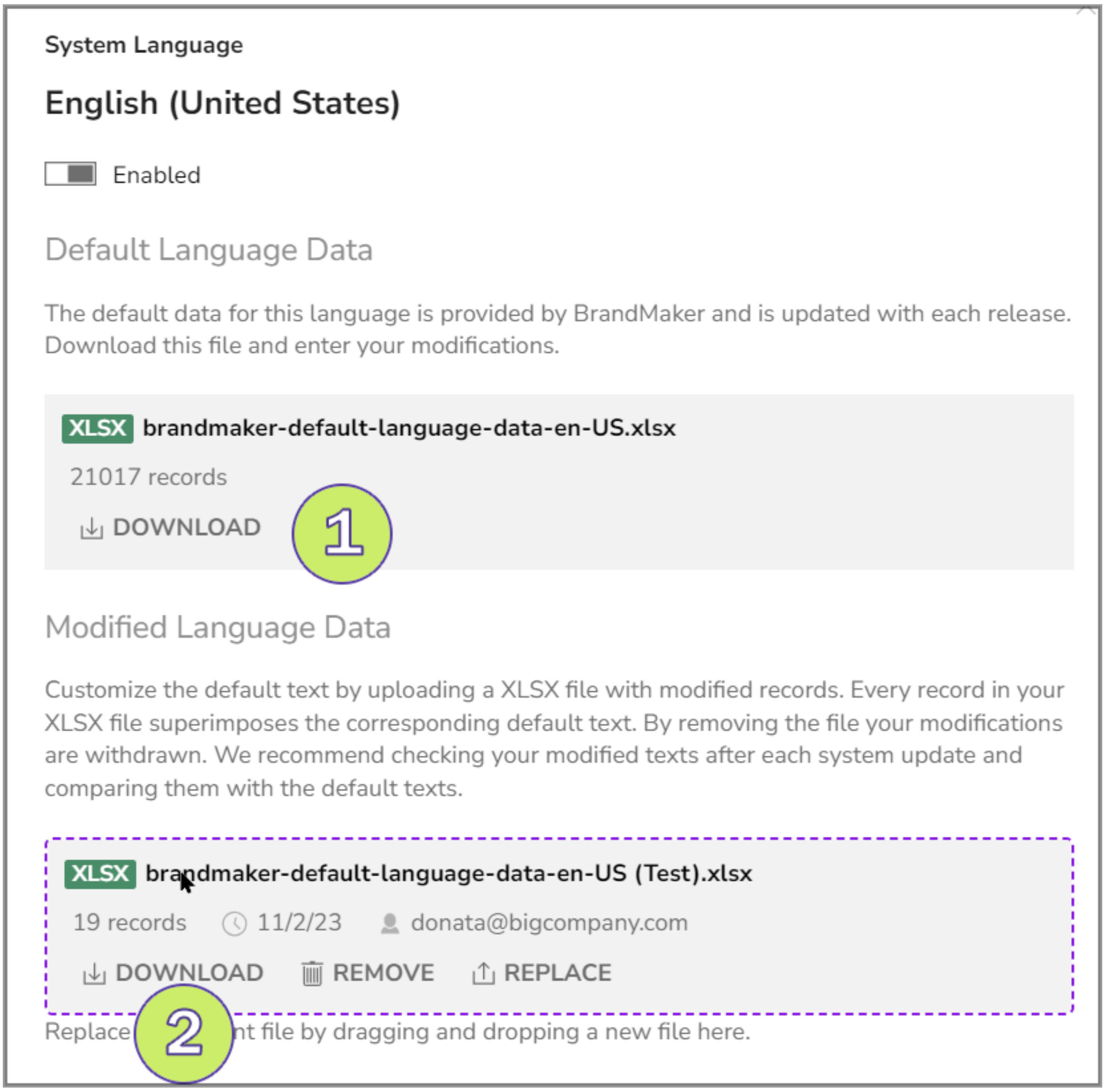
      The file is uploaded.
9. Close the dialog by clicking the *X* in the top right.

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

7.3.2.2 Adjusting Other Interface Texts

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

   A dialog box will slide in on the right side.



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

   You will download the original interface texts.

4. Locate the Excel file in the download folder of your browser.
5. Click *Download* at the bottom area of the screen 2 .

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

6. Locate the Excel file in the download folder of your browser.
7. Open the download folder and open both Excel files.

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

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

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

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

7.3.2.3 Resetting Changes

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

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

   A dialog box will slide in on the right side.

3. Click *Remove* at the bottom area of the screen:

The modified texts are deleted. The modified texts are immediately effective and visible with the next page reload of your browser.

7.3.3 Custom Languages

In addition to the 12 default languages, you can add up to 13 custom languages. Please note that you are responsible for translating the interface texts into your respective local language.

Also note that the system only supports left-to-right languages, such as Latin or Cyrillic fonts. Asian fonts are also displayed from left to right. You can create custom right-to-left languages, but the system displays them left-to-right.

Process

To create custom languages in the Uptempo platform, go through the following process:

1. *Adding Customer-Specific Language* on the facing page: Create the administration structure for the customer-specific language.
2. Define source language: Check which default language is used to translate the customer-specific language. This does not require any action in the system, but is merely a check of the source language from which your translation service provider can translate into the desired target language. If you have any questions, please contact the person responsible for translation in your company.
   Please note that the source language should always be a default language. Please also note that customizations in the default language will only be taken into account if you manually add the customizations to the file to be translated.
3. *Defining Fallback Language* on page 146: Define the so-called fallback language. The fallback language is used if a text does not exist in the customer-specific language. The fallback language is always a default language.
   Ideally, the fallback language is also a source language.
4. *Downloading the Source Language* on page 149: Download the source language and have it be translated into the customer-specific language. The employee responsible for the translation needs the information in the *Information for the Translation* on page 150 section.
5. *Uploading the translation* on page 150: Upload the translated texts.
6. *Enable Customer-Specific Language* on page 151: Enable the now-translated language.

The users of your system users can navigate to > *User name* > *My Profile* > *Edit Account* and then select the new custom language from the System Language menu on the Settings tab and click *Save*.

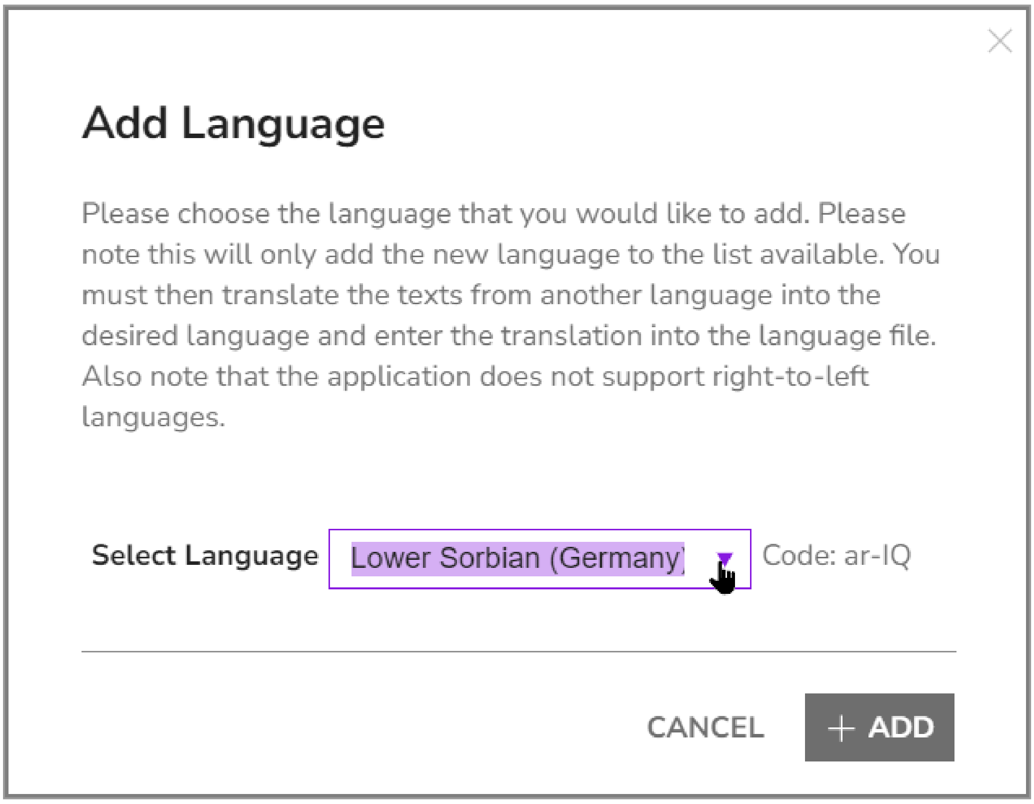
More Tasks

- *Disable Customer-Specific Language* on page 151
- *Delete Customer-Specific Language* on page 152

7.3.3.1 Adding Customer-Specific Language

1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.
2. Click the button *Add language* in the *Your Custom Languages* area.

   The *Add language* dialog box opens:

3. Select a language.

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

4. Choose *Add*.

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

Next Step

Define one of the standard languages as the source language for translation with a translation manager in your company. This does not require any action in the system. The fallback language is used when a text does not exist in the custom language. The fallback language is always one of the standard languages. Ideally, the fallback language is also a source language. Note *Defining Fallback Language* below.

7.3.3.2 Defining Fallback Language

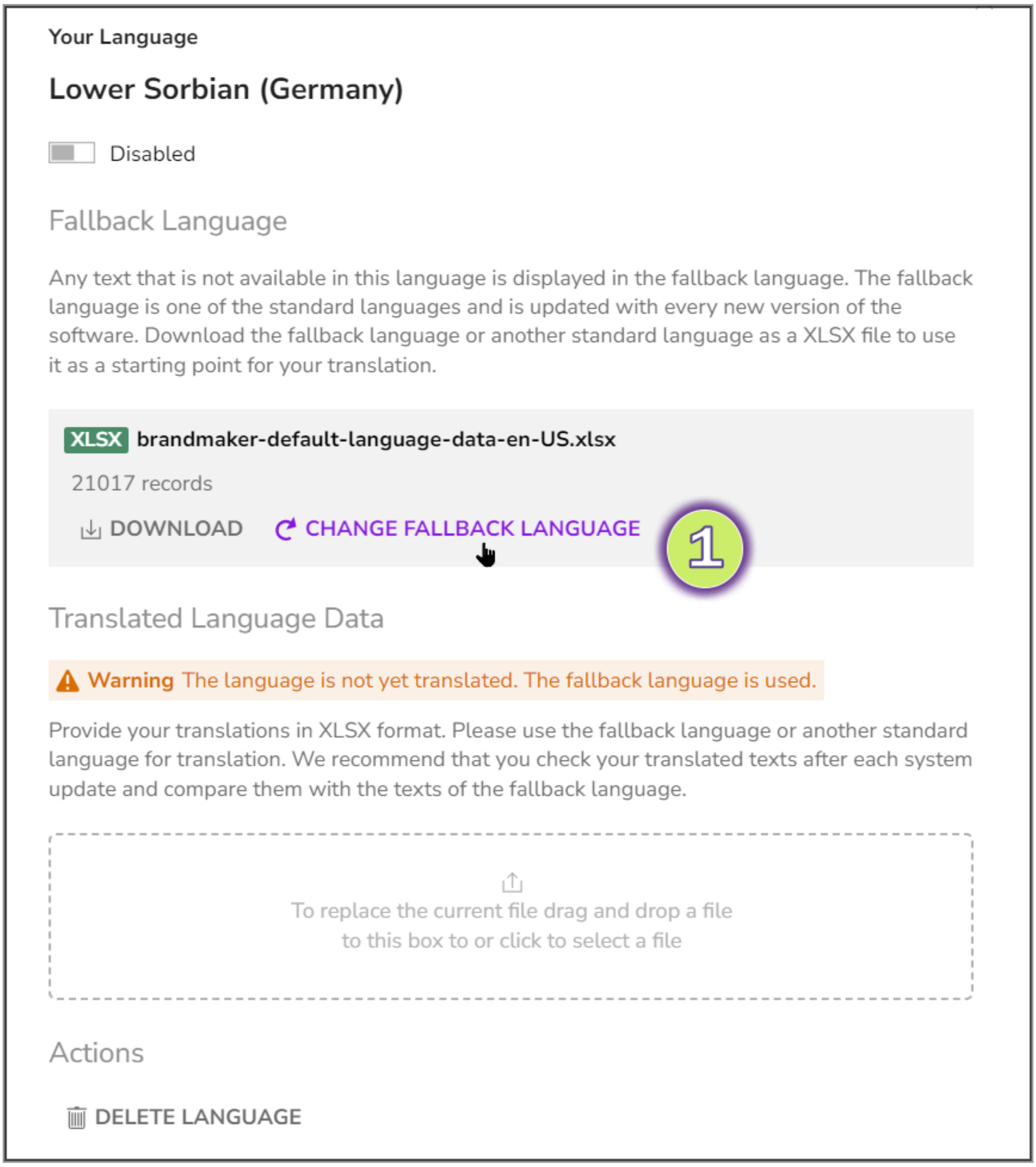
Define the so-called fallback language. The fallback language is used when a text does not exist in the customer-specific language. The fallback language is always one of the default languages and, ideally, also a source language. The preset is the default language English (United States).

Prerequisite

You have added at least one customer-specific language. For more information, see *Adding Customer-Specific Language* on the previous page.

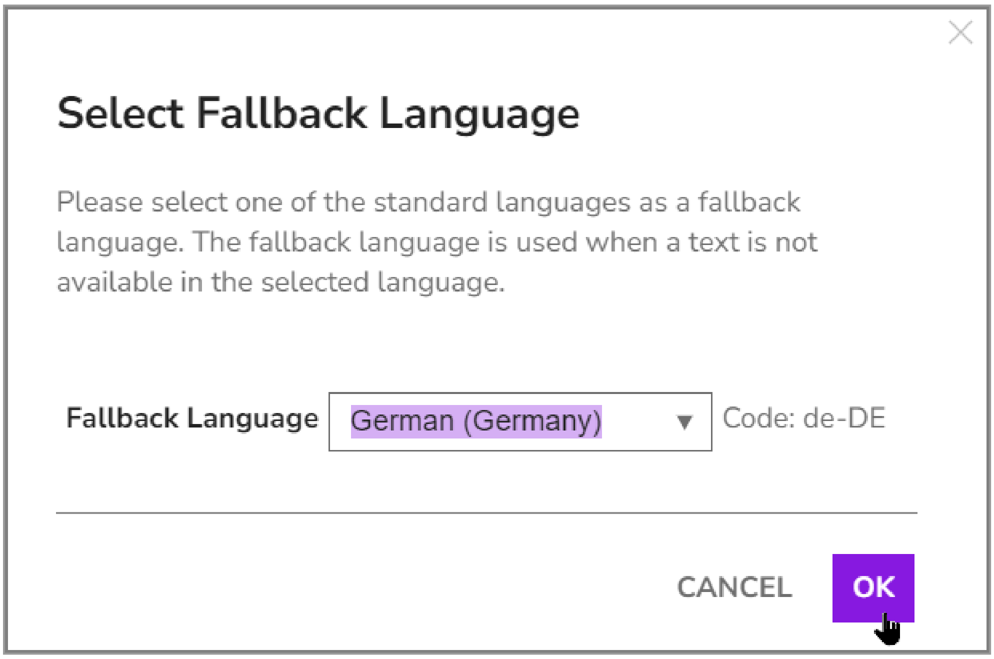
1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.
2. Click the *Customize* button in the *Your Custom Languages* area for the language for which you want to define the fallback language.

   The *Your language* dialog box opens:



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

   The *Select fallback language* dialog box opens.



4. Select a different default language as the fallback language from the drop-down list.
5. Click *OK*.

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

   The dialog box closes.

You have changed the fallback language.

Next Step

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

7.3.3.3 Downloading the Source Language

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

If the Source Language Is Not the Fallback Language

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

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

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

If the Source Language Is Also the Fallback Language

1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.
2. Click the button *Customize* in the *Your Custom Languages* area for the language into which you want to translate.

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

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

Next Step

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

7.3.3.4 Information for the Translation

If you are translating the interface texts of the Uptempo platform, you or the translator need the following information:

Structure of the File

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

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

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

The text to be translated is entered in column B.

Tags and Variables

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

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

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

7.3.3.5 Uploading the translation

1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.
2. Click the button *Customize* in the *Your custom languages* area for the language into which you want to translate.

   The *Your language* dialog box opens.

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

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

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

You have uploaded the translation.

Next Step

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

7.3.3.6 Enable Customer-Specific Language

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *UI Languages*.
2. In the *Your Custom Languages* area, click the switch in the first column of the line of the language you want to enable.

   The switch is displayed as follows:

You have enabled the custom language.

To select a different language, a user clicks > *User name* > *My Profile*, selects *Edit Account*, chooses a different language from the *System Language* menu on the *Settings* tab and clicks *Save*.

The changed language will not switch immediately. The user must leave the current page and navigate elsewhere on the Uptempo platform. After reloading, the selected language will be effective.

7.3.3.7 Disable Customer-Specific Language

1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.

   UI
2. In the *Your Custom languages* area, click the switch in the first column of the line of the language you want to disable.

   The switch is displayed as follows:

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

7.3.3.8 Delete Customer-Specific Language

1. Navigate to the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.
2. In the *Your Custom Languages* area, click the *Customize* button in the line of the language that you want to delete.

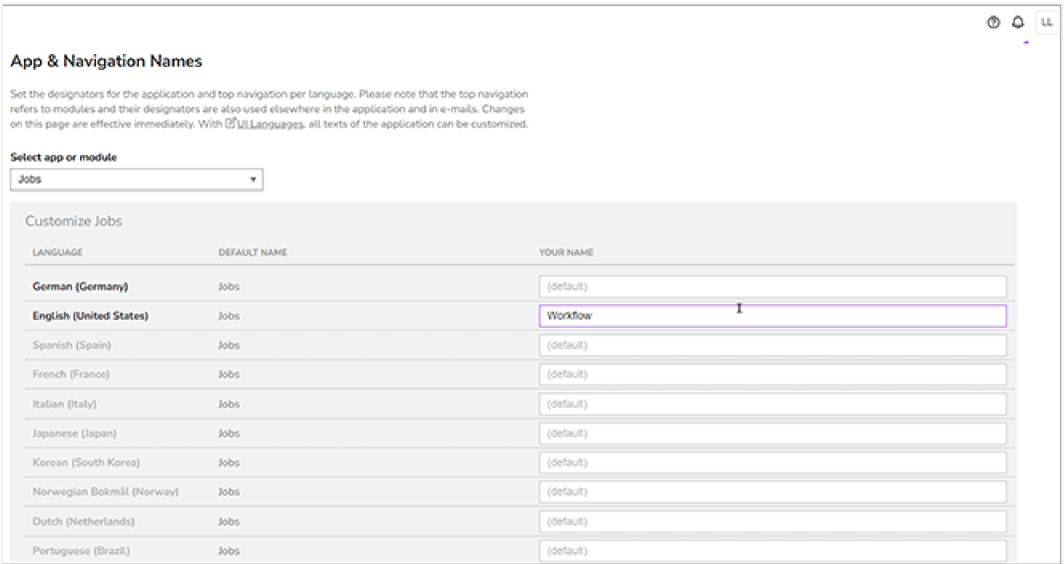
   The *Your language* dialog box opens.
3. Click *Delete language* at the bottom area of the screen.

You have deleted the custom language. The interface texts are displayed in the default language again.

7.3.4 Application and Navigation Names

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

You can change the names under > *Administration* > *Overview* > *Look & Feel* > *App & Navigation Names*:



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

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

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

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

7.4 E-mail Templates

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

> Note
>
> Currently, you can only edit the E-mail templates used by the administration.

Editing Options

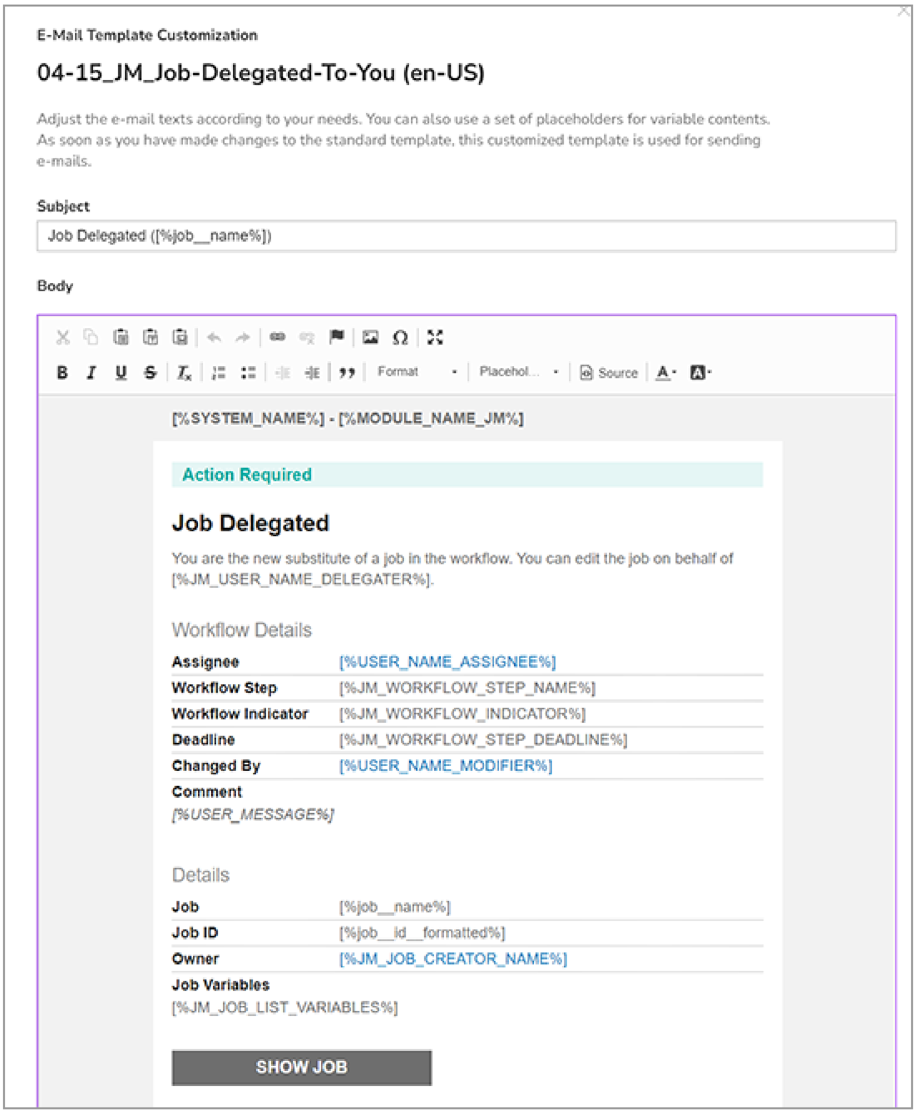
The chapter *Editing Options* below describes the options you have for customizing the E-mail templates.

Associated Tasks

- *Editing an E-Mail Template* on page 157
- *Reset Modified E-Mail Template* on page 158

7.4.1 Editing Options

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



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

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

Editing

Button	Description	Shortcut
	Cut	CTRL-X or CMD-X
	Copy	CTRL-C or CMD-C

Button	Description	Shortcut
	Paste	CTRL-V or CMD-V
	Insert as plain text	CTRL-SHIFT-V or CMD-SHIFT-V
	Paste from Word	–
	Undo or redo changes	CTRL-Z or CMD-Z and CTRL-Y or CMD-Y

Objects

Object	Description	Shortcut
	Insert/Edit link	CTRL-L or CMD-L
	Remove link	none
	Create/Edit anchor	none
	Insert/Edit image	none
Ω	Insert special character	none

Display

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

Formatting

Object	Description	Shortcut
B	Bold	CTRL-B or CMD-B
I	Italics	CTRL-I or CMD-I
U	Underline	CTRL-U or CMD-U
	Remove formatting	none
	Insert/Remove numbered list	none
	Insert/Remove bulleted list	none
	Increase/Decrease indent	none
	Paragraph as block quote	none
Format	Modify paragraph format	none
Placehol...	Insert variable	none
A	Modify font color	none
A	Modify background color	none

7.4.2 Editing an E-Mail Template

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *E-mail Templates*.
2. In the menu *Module* select the module you want to edit an E-mail template from.

3. In the menu *E-Mail Template to Customize* you want to modify.

   The table shows the templates for all system languages.

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

   The E-mail template will open to the right.

5. Edit the template. Note the *Editing Options* on page 154.

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

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

7. Click *Save*.

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

7.4.3 Reset Modified E-Mail Template

1. Navigate to > *Administration* > *Overview* > *Look & Feel* > *E-mail Templates*.

2. Select the module whose modified e-mail template you want to reset.

3. Select the e-mail template.

   The table shows the templates for all system languages.

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

   The e-mail template will open to the right.

5. Click *Reset*.

   A message is displayed.

6. Click *OK*.

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

8

System Configuration

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

8.1 Login Configuration

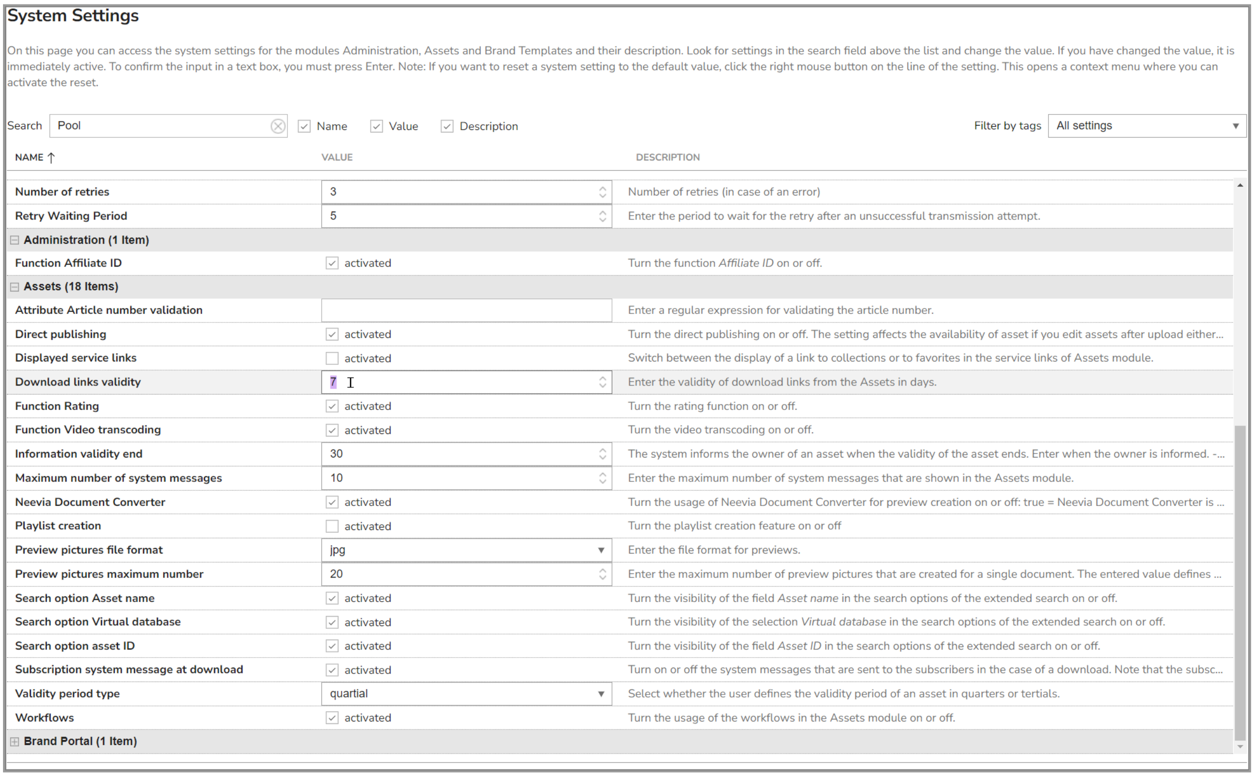
You have a number of different login options for authentication of users in the system:

- *Manual login*: The user enters a valid, active user name and the allocated password. The user logs in by clicking the *Sign in* button. The manual login should only be deactivated if the login for each user can be performed using SSO.
- One-click login: The user clicks *Login with Microsoft* and logs into the system using Single Sign-On (SSO). If you have any additional questions, contact your contact person.

8.2 System Settings

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

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



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

You can use the search field above the list to search for specific settings. Use the checkboxes above the list to switch the search on or off in the relevant column. Use the *Filter by tags* list to limit the settings displayed to a pre-defined set of key topic areas.

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

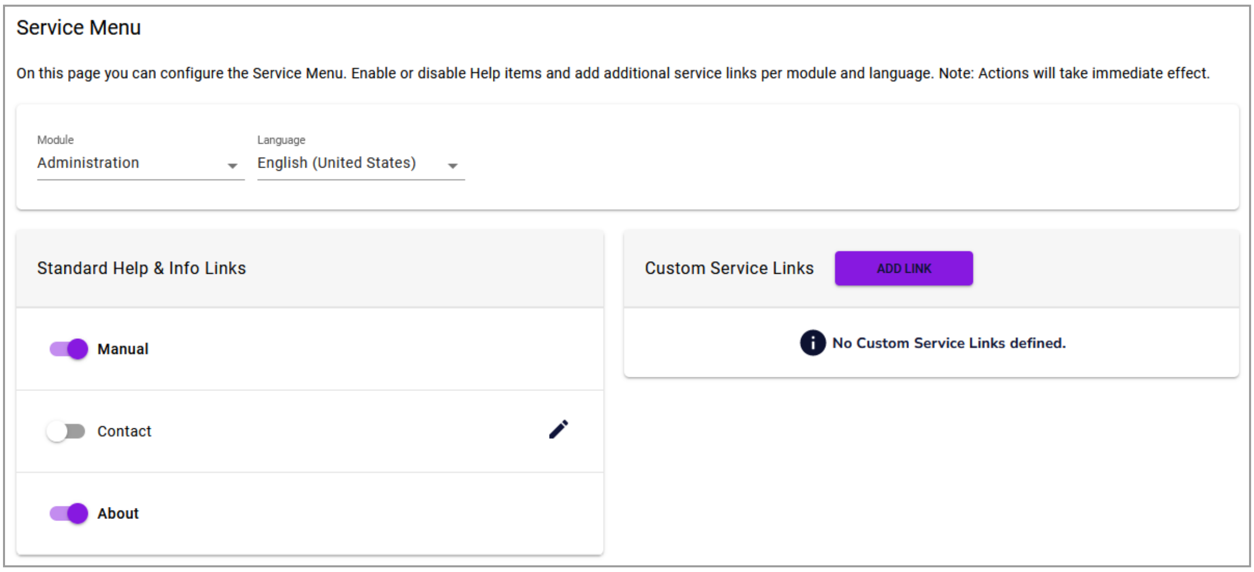
> Note
>
> Note that a changed setting comes into effect immediately. A system restart is not required.

For a complete list of all of the available system settings, see the chapter *System Settings* on page 254.

8.3 ? Button and Service Menu

In the header of the Uptempo platform, all users can reach the ? button. The button takes the user to further information and helpful links. Please note that the action of the button differs depending on which page the user is on:

- For the pages > *Activities*, > *Budget*, > *Investments*, > *Strategy* and > *Insights* of the Plan and Spend product: Clicking on the ? button opens the help for the respective page directly. This action cannot currently be changed for these pages.
- For all pages of the Work product and the administration: Clicking on the ? button opens a menu in which the user can usually access several links. The displayed links can be customized for each module and interface language and additional links can be added. As an administrator, you configure the service menu for each module and each language under > *Administration* > *Overview* > *System configuration* > *Service Menu*.



Module and Language

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

Standard Links

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

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

Custom Links

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

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

8.4 E-Mail Service

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

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

E-Mail Service Settings Area

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

Attention!

Do not change the domain after @ without consulting IT. Unauthorized changes have serious consequences:

- Security Breach: Altered domains raise alarms, potentially blocking outgoing emails.
- Reputation Damage: Suspicious domain activities harm trust.

You may only add *noreply* before @ (e.g., *Company XY Marketing Hub@uptempo.io* can be *Company XY Marketing Hubnoreply@uptempo.io*).

Consult your IT before making any changes to ensure a trouble-free operation of the software and e-mail integrity.

The Settings Area of the SMTP Server

Setting	Description
Server address	Enter the host name of the SMTP server that will be used by the application.
SSL/TLS	If activated, the connection to the e-mail server is secured by TLS encryption. If the e-mail server STARTTLS is not supported, the connection is kept without TLS encryption.

Setting	Description
SMTP authentication	Turn authentication for the SMTP server on or off.
Username for SMTP authentication	Note: Only if authentication is enabled on the SMTP server. Enter the username for authentication on the SMTP server.
Password for SMTP authentication	Note: Only if authentication is enabled on the SMTP server. Enter the password for authentication on the SMTP server.

Sending a Test E-Mail

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

8.5 Rich Text Editor

The platform provides a rich text editor in several places. You can configure the editor for use in the following areas:

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

The following sections describe the types of configurations that you can set.

8.5.1 Configuration

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

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

Prerequisites

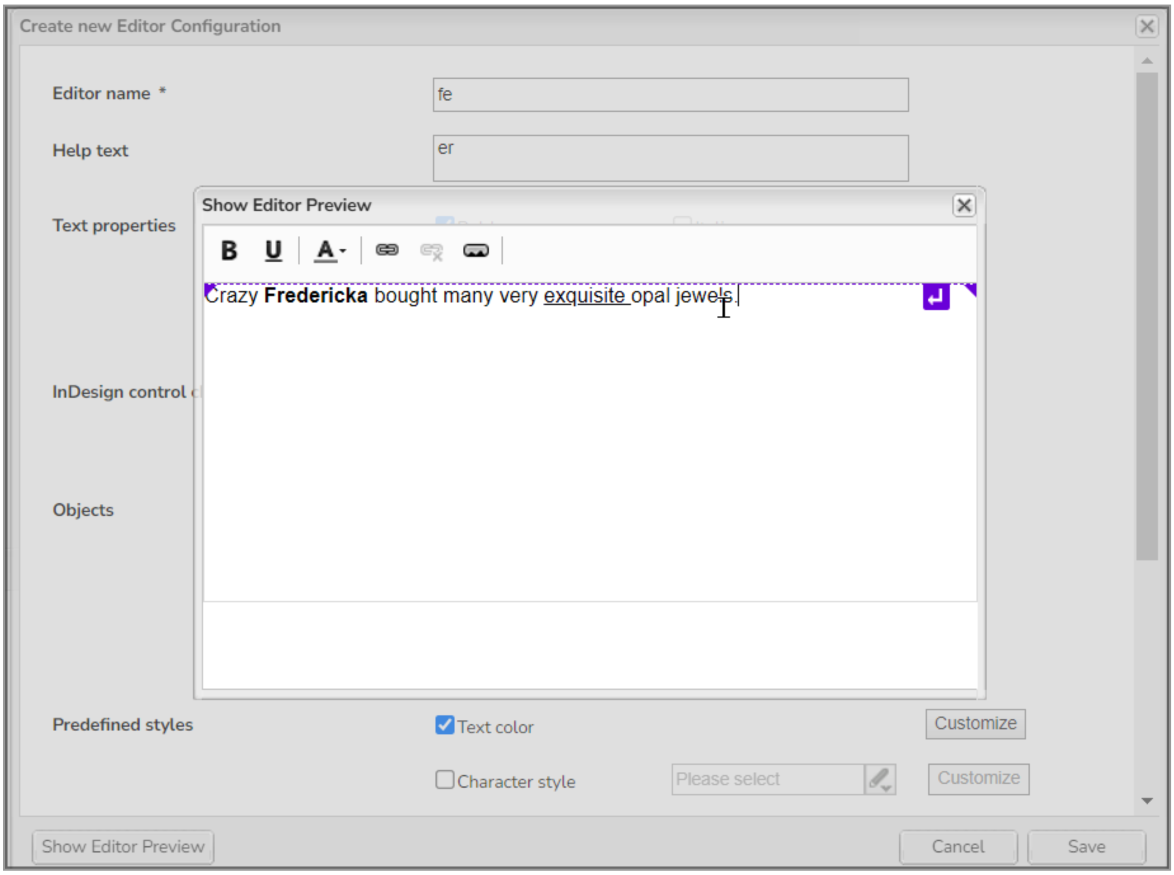
You have the permission *Manage Editor Configurations*.

Create a Configuration for the Rich Text Editor

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Configuration*.

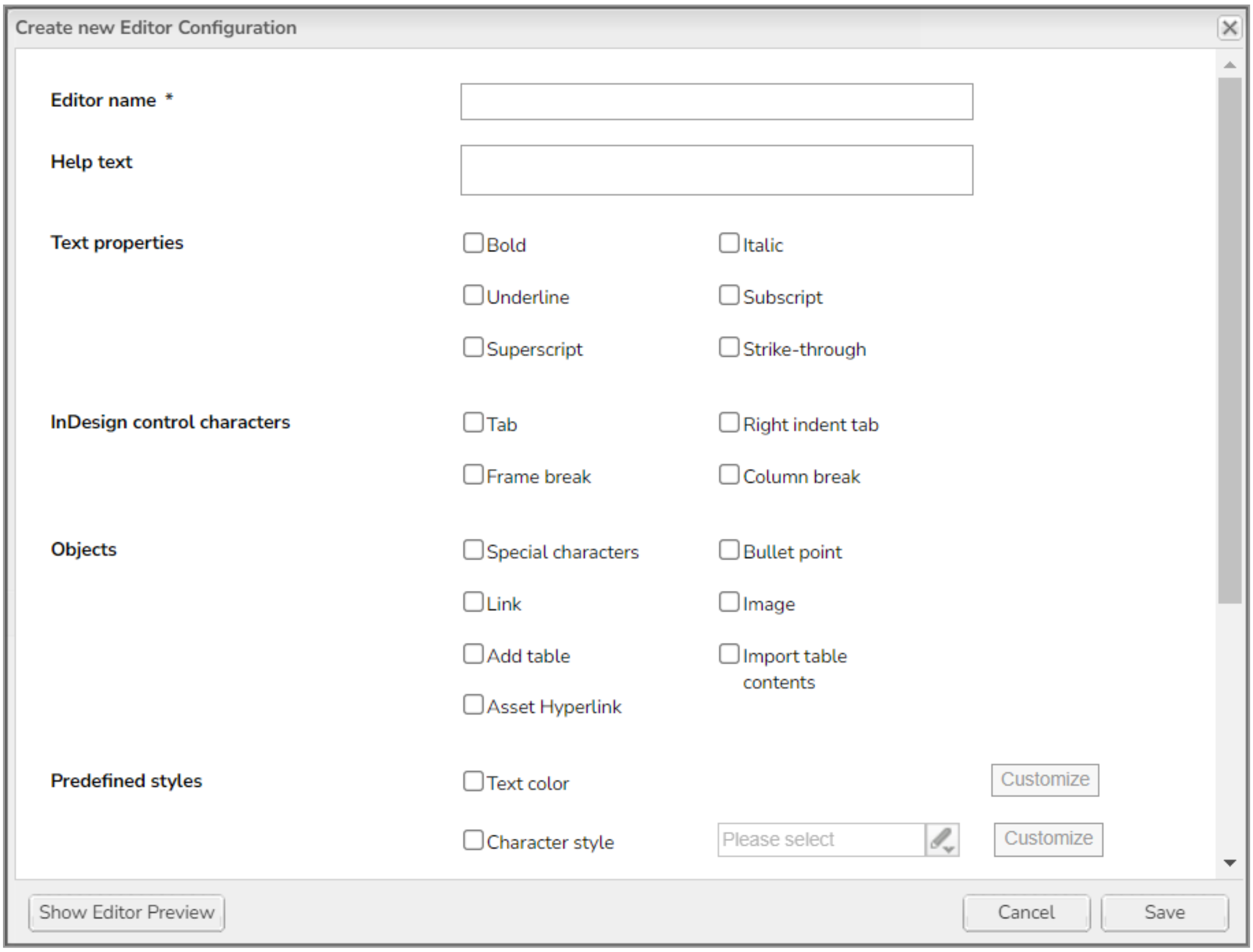
   The list of configurations opens.
2. Choose *Create new Configuration* below the list.

   The *Create new Editor Configuration* dialog box opens.
3. Enter a name in the *Editor name* field.
4. Enter a help text if required.
5. Activate the checkboxes to create the editor configuration. Note the descriptions in the tables below.
6. Click the *Show Editor Preview* to check your settings.



7. Choose *Cancel* to exit the editor preview.
8. Click *Save*.

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



Configuration settings

Name	Description
Editor name	Enter the name used to display the editor configuration.
Help text	Enter additional information (about using the item, for example).
Text prop-erties	Activate the checkboxes to permit text formatting.
InDesign control char-acters	These are special characters that are used to define certain formatting or layout elements within a document. They are typically not visible in the final output but affect the behavior of the text or objects in the document.

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

Note

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

8.5.2 Styles

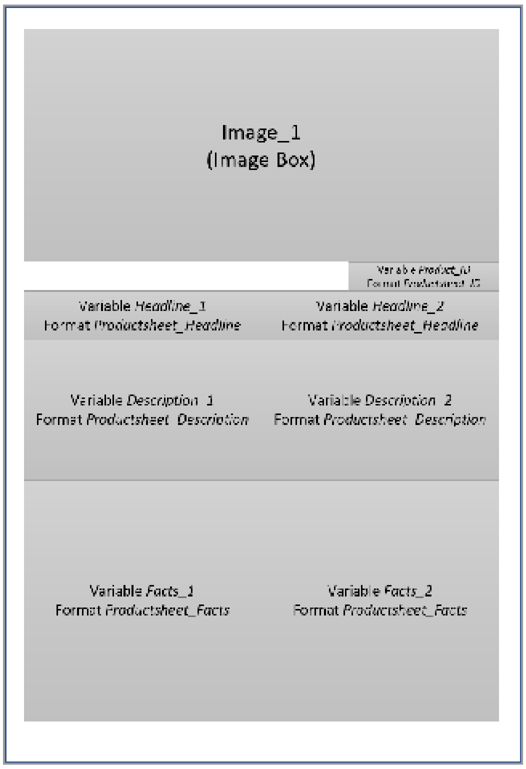
> **Note**
>
> Note that the styles of the rich text editor are only used to display texts in the rich text editor. Text that is entered in documents in *Brand Template Builder* module is also displayed in these styles when it is entered using the rich text editor. However, the text is displayed in the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

Replacement Styles

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

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

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



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

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

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

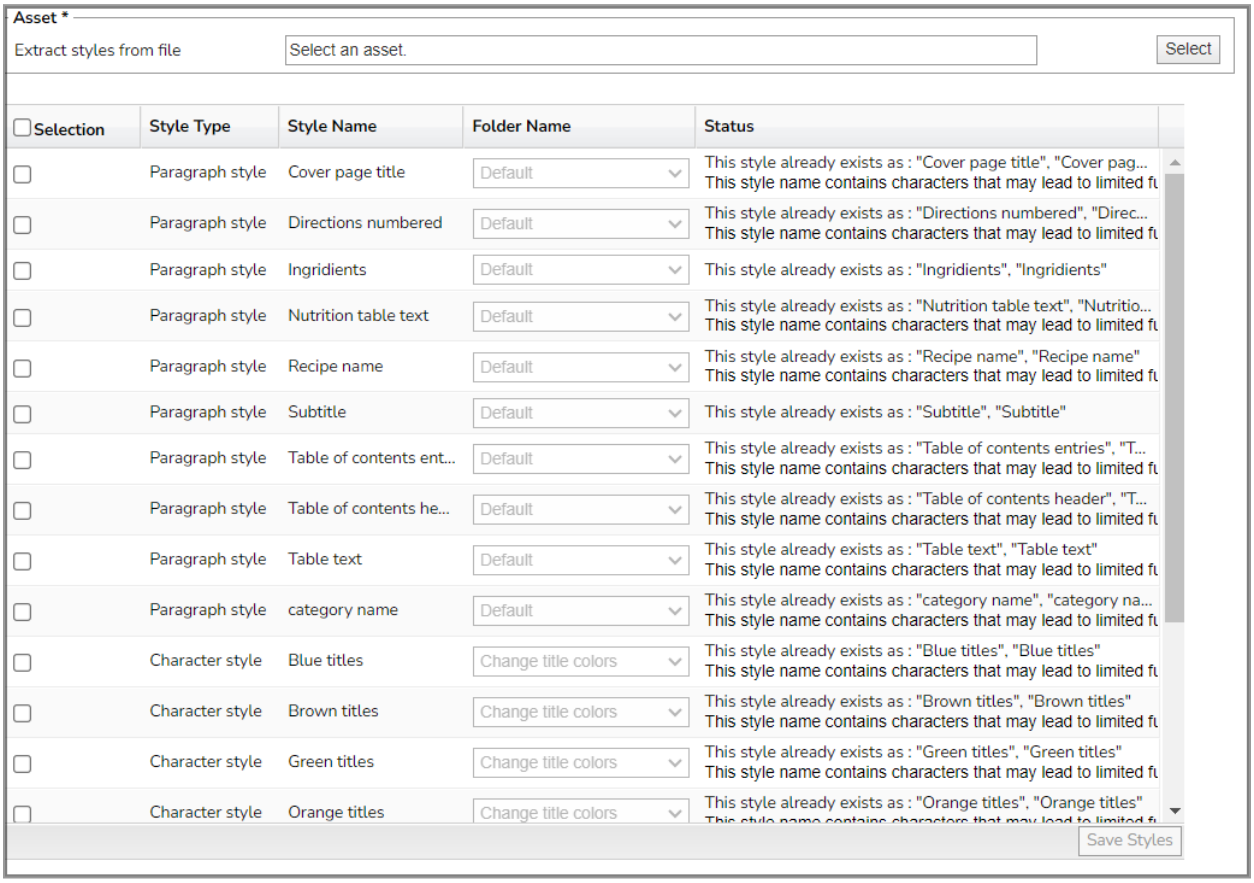
Styles can also be created purely as replacement styles. In this case, the styles are available only in the dropdown list for replacement styles and cannot be selected anywhere else.

8.5.2.1 Creating Formats Automatically

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

Selecting and Analyzing a File

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



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

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

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

Creating Formats

Select the required formats in the first column and click *Save Styles*.The system creates the styles and applies as much of the formatting as possible. You must then verify that the formatting was created correctly.

8.5.2.2 Character Styles

To work with a document that is as close to the original as possible when you customize promotional materials, you can create the appropriate character styles for the Rich Text Editor.

Prerequisites

You have the permission *Manage Character Styles*.

Create Character Styles

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Character Styles*.

   The list of character styles is displayed.

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

   The *Create style* dialog box opens.

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

4. Click *Save*.

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

Name	Description
Name	Enter the name with which the style is to be displayed.
INDD-Name	Enter the name with which the style is created in the InDesign document. Use the following characters only: a-z, A-Z, 0-9, underscore (_), and hyphen (-). The name must be unique within the INDD file.
Only replace-ment style	If you activate this checkbox, the style can be used only as a replacement style for other styles (see *Styles* on page 172). All the settings described below are then inapplicable.
Font family	Select a font family from the dropdown list.
Font weight	Select the font weight from the dropdown list (for example, normal or bold).
Font size	Select the font size from the dropdown list (in pt).

Name	Description
Font style	Select the inclination of the font from the selection list.
Text decoration	From the selection list, choose whether the text is to be displayed with underline, line through, or overline.
Vertical align	From the selection list, select the vertical alignment of the text (for example, with sub super)
Font color	Define the font color. Use the color picker to make it easier to select the color value or enter it in different color systems.
Margin top	Define the upper gap.
Margin bottom	Define the lower gap.
Locale	In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 172). If the style that you are creating or editing contains only Latin characters, for example, you can define one style with a Chinese font for the locale zh-Hans and one style with Cyrillic font for the locale ru-RU. 1. Click *New Replacement*. A dialog box opens. 2. In the dropdown lists, select a locale and style. 3. Click *Save*. You have created a replacement style. If you want to edit the replacement style, click the pencil icon in the table. If you want to delete the replacement style, click the recycle bin icon. Note that you can delete a replacement style only if it is not in use.

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

8.5.2.3 Paragraph Style

To work with a document that is as "true to the original" as possible when you customize advertising materials, you can create the appropriate paragraph styles for the Rich Text Editor.

Prerequisites

You have the permission *Manage Paragraph Styles*.

Create Paragraph Style

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Paragraph Styles*.

   The list of paragraph styles is displayed.

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

   The *Create style* dialog box opens.

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

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

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

Name	Description
Only replace-ment style	If you activate this checkbox, the style can be used only as a replacement style for other styles (see *Styles* on page 172). All the settings described below are then inapplicable.
Font family	Select the font family from the dropdown list.
Font weight	Select the font weight from the dropdown list (for example, normal or bold).
Font size	Select the font size from the dropdown list.
Font style	Select the inclination of the font from the selection list.
Text decor-ation	From the selection list, choose whether the text is to be displayed with underline, line through, or overline.
Text align	Select the alignment of the text from the selection list (for example, left-aligned).
Font color	Define the font color. Use the color picker to make it easier to select the color value or enter it in different color systems.
Margin top	Define the upper gap.
Margin bottom	Define the lower gap.
Margin left	Define the gap on the left.
List	Enable a bulleted list, if desired. You can choose between bullets (Bullet radio button) and numbered bullets (Numbered radio button). Select a bullet or numbering as needed. Use the color picker to specify the color.

Name	Description
Locale	In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 172). If the style that you are creating or editing contains only Latin characters, for example, you can define one style with a Chinese font for the locale *zh-Hans* and one style with Cyrillic font for the locale *bg-BG*. 1. Click *New Replacement*. 2. A dialog box opens. 3. In the dropdown lists, select a locale and style. 4. Click *Save*. You have created a replacement style. If you want to edit the replacement style, click the pencil icon in the table. If you want to delete the replacement style, click the recycle bin icon. Note that you can delete a replacement style only if it is not in use.

Note

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

8.5.2.4 Table Styles

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

Prerequisites

You have the permission *Manage Table Styles*.

Create Table Style

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Table Styles*.

   The list of table styles is displayed.

2. Click *New Table Style* below the list.

The *Create Style* dialog box opens.

3. Enter the name with which the style is to be displayed.
4. Enter the name with which the style is created in the InDesign document.
5. Activate the *Only replacement style* checkbox if the style is used only as a replacement style for other styles (see the section *Replacement styles* in the chapter *Styles* on page 172).
6. In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 172):
    a. Click *New Replacement*.

       A dialog box opens.
    b. In the dropdown lists, select a locale and style.
    c. Click *Save*.

   The dialog box closes.
7. Click *Save*.

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

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

8.5.2.5 Manage Cell Styles

To work with a document that is as "true to the original" as possible when customising copy, you can create the appropriate cell styles for the Text Editor.

Prerequisites

You have the permission *Manage Cell Styles*.

Create Cell Style

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Cell Styles*.

   The list of cell styles is displayed.

2. Click *New Cell Style* below the list.

   The *Create style* dialog box opens.

3. Enter the name with which the style is to be displayed.
4. Enter the name with which the style is created in the InDesign document.
5. Activate the *Only replacement style* checkbox if the style is used only as a replacement style for other styles (see the section *Replacement styles* in the chapter *Styles* on page 172).
6. In this table, enter the locale in which the style is to be replaced and the style to replace it with (see the section *Replacement styles* in the chapter *Styles* on page 172):
   a. Click *New Replacement*.

      A dialog box opens.

   b. In the dropdown lists, select a locale and style.
   c. Click *Save*.

   The dialog box closes.

7. Click *Save*.

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

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

8.5.3 Creating Colors

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

Prerequisites

You have the permission *Manage Colors*.

1. Navigate to > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Colors*.

   The list of colors is displayed.

2. Choose *Create color* below the list.

   The *Create color* dialog box opens.

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

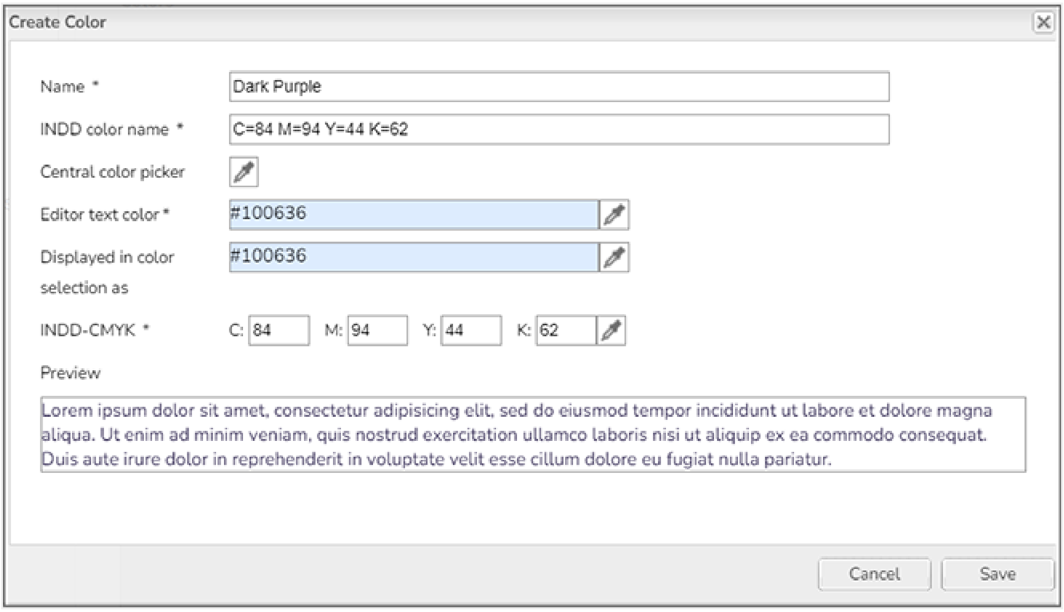
4. Click *Save*.

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

Name	Description
Name	Enter the name with which the color is to be displayed.
INDD color name	Enter the name with which the style is created in the InDesign document. Use the following characters only: a-z, A-Z, 0-9, underscore (_), and hyphen (-). The name must be unique within the INDD file.
Central color chooser	The selected color value is entered in the *Editor text color* field and a preview is generated automatically.
Editor text color	Define the text color. The selected global color value is predefined as the value.
Displayed in color selection as	Specify which color value is displayed in the color selection.
INDD-CMYK	Enter the CMYK value from the InDesign document. This value is used if the INDD file does not contain a color with a name that matches the entry in *INDD color name*.
Preview	The preview is displayed in accordance with the configured settings.

Note

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



9

System Maintenance

9.1 System Messages and Maintenance Messages

You can send important news or information as a user message.

You can also send user messages specifically:

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

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

9.1.1 Sending a User Message to an Organizational Unit

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

Prerequisites

You have the permission *Manage System Message*.

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

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

   This expands the input screen.
4. Activate the checkbox for the *Marketing* organizational unit.
5. Choose *Add organizational units*.
6. Select the date until which the system message is valid.

7. Enter the *subject* of the system message.
8. Enter the text for the system message in the *Message* input field.
9. Choose *Send message*.

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

9.1.2 Configuring a Maintenance Message

You want to configure a maintenance message due to *system maintenance*. You want to display the message on the login page, but not in the application header, from 18:00 on March 13, 2024 to midday on March 14, 2024. You do not want users to be able to log during the system maintenance. You also want to send the maintenance message by e-mail at midday on March 12, 2024.

Prerequisites

You have the permission *Manage Maintenance Message*.

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

       A calendar dialog box opens.
    b. Choose *From/to*.
    c. Click March 13, 2024 and March 14, 2024.
    d. In the *From* area, click the *Select time* field and choose 18:00.
    e. In the *To* field, click the *Select time* field and choose midday.
    f. Choose *Apply*.

       The calendar dialog box closes.
    g. In the *Notification* area, enter your text for the maintenance message.
    h. Ensure that the *Header of the application* checkbox is deactivated.
    i. Activate the *Login screen* checkbox.
    j. Click *Save*.

   k. Choose *Schedule*.

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

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

   a. Click the *Date* field.

      A calendar dialog box opens.

   b. Choose *From/to*.

   c. Click March 13, 2024 and March 14, 2024.

   d. In the *From* area, click the *Select time* field and choose 18:00.

   e. In the *To* field, click the *Select time* field and choose midday.

   f. Choose *Apply*.

      The calendar dialog box closes.

   g. Choose *Schedule*.

      The time control for automatically locking the login is started.

4. Open the *E-mail* area and configure the settings for sending an e-mail at the desired time.

   a. Click the *Date* field.

      A calendar dialog box opens.

   b. Click March 12, 2024.

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

   d. Click *Apply*.

      The calendar dialog box closes.

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

   f. Click *Save*.

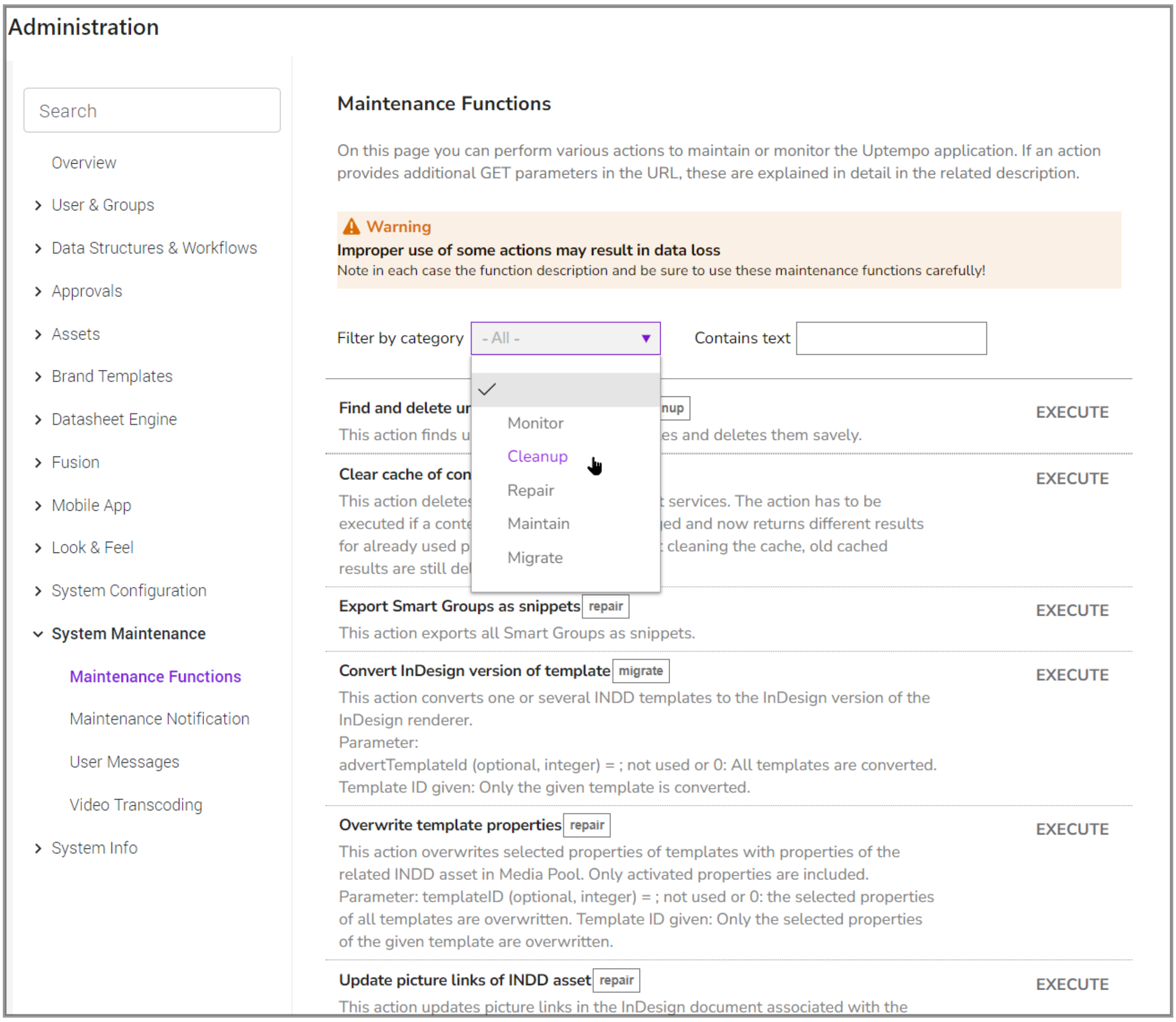
   g. Click *Schedule*.

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

The maintenance message has been created: at midday on March 12, 2024, the message will by sent to all the system users by e-mail. From 18:00 on March 13, 2024, an appropriate message will be displayed on the login page but not in the header. A login lock will begin at the same time. The login page will stop displaying the message at midday on March 14, 2024.

9.2 Maintenance Functions

You can execute predefined actions by default to safeguard, improve, or monitor the functionality of the Uptempo platform. You can access the maintenance functions under > *Administration* > *Overview* > *System Maintenance* > *Maintenance Functions*:



Prerequisites

You have the permission *Manage Database*.

Functions

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

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

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

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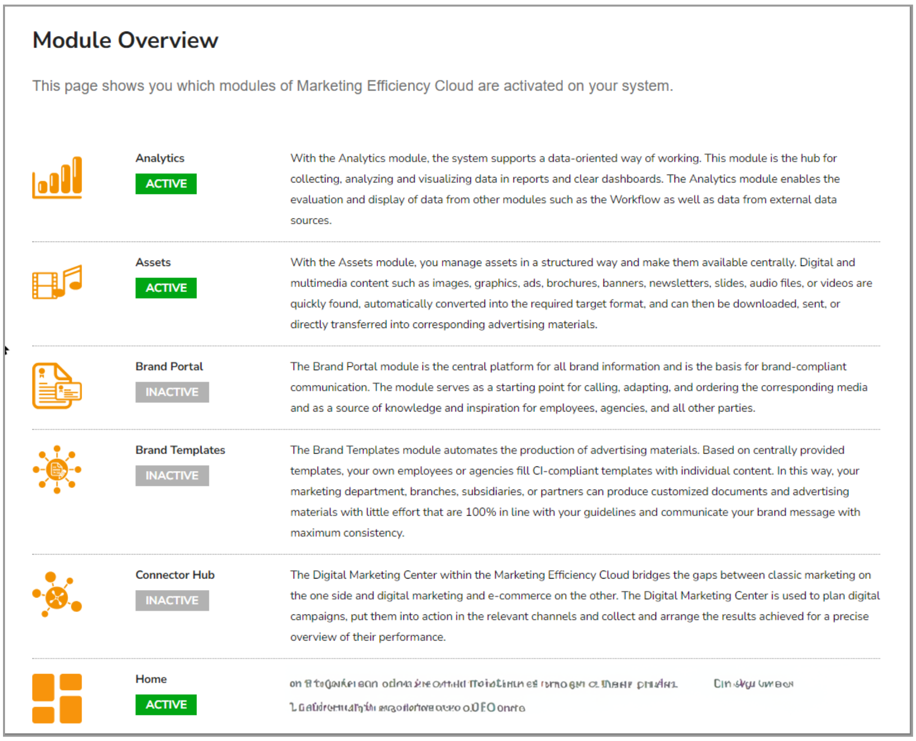
10

System Information

10.1 Module Overview

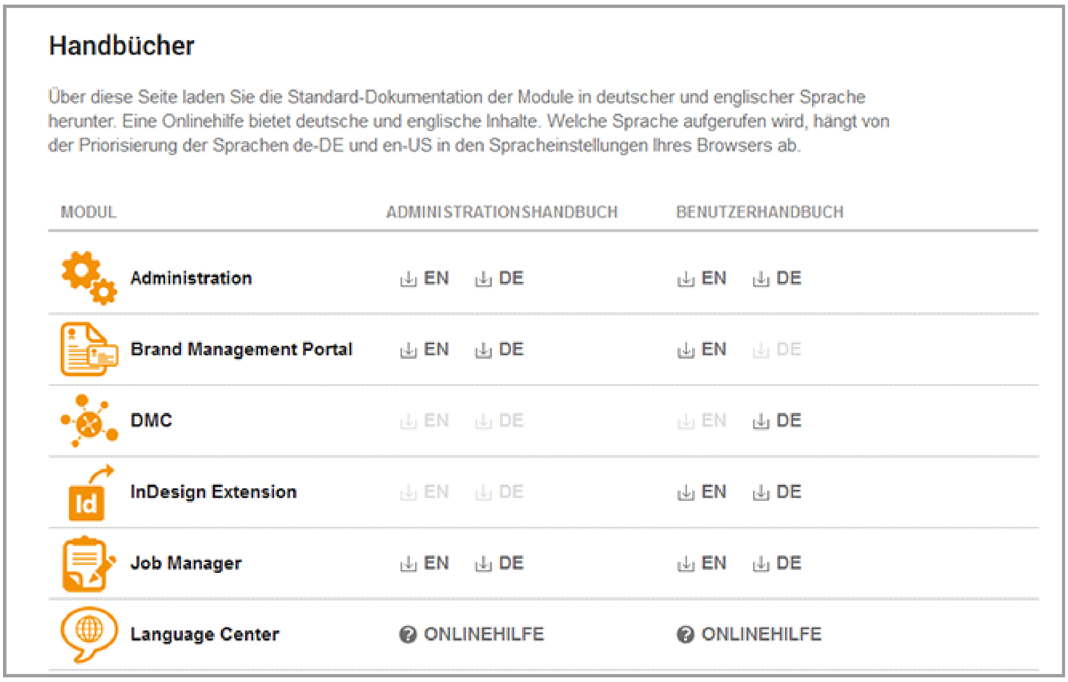
The page > *Administration* > *Overview* > *System Info* > *Module Overview* displays which modules are activated in your system. Note that the activation of the modules can only be changed by Uptempo.



10.2 Manuals and API Descriptions

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

Click *EN* for the English and *DE* for the German PDF of a specific manual. Some manuals still only exist in PDF format. If *Online Help* is listed in the table, you can click to access a HTML5 help with German and English contents. Which language is called depends on the prioritization of the languages de-DE and en-US in the language settings of your browser.



Handbücher

Über diese Seite laden Sie die Standard-Dokumentation der Module in deutscher und englischer Sprache herunter. Eine Onlinehilfe bietet deutsche und englische Inhalte. Welche Sprache aufgerufen wird, hängt von der Priorisierung der Sprachen de-DE und en-US in den Spracheinstellungen Ihres Browsers ab.

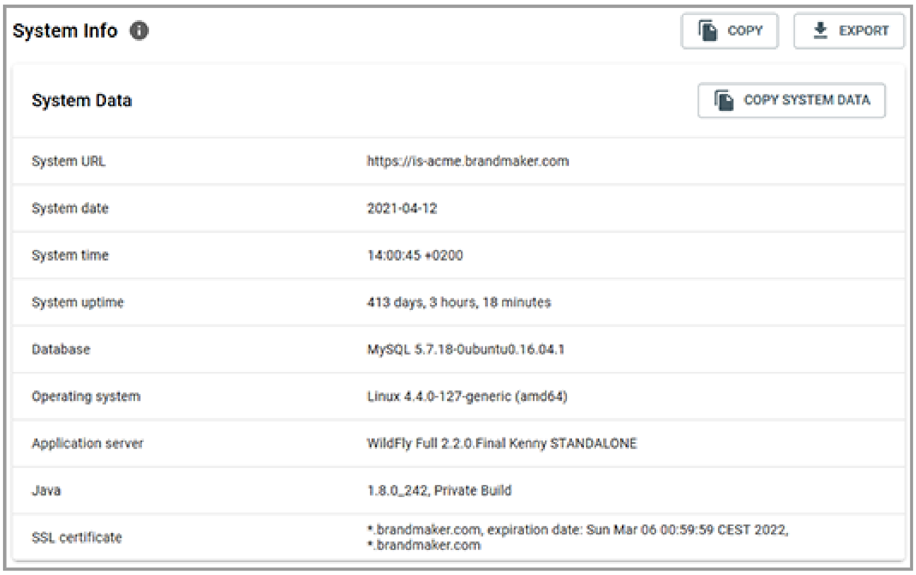
MODUL	ADMINISTRATIONSHANDBUCH	BENUTZERHANDBUCH
Administration	EN DE	EN DE
Brand Management Portal	EN DE	EN DE
DMC	EN DE	EN DE
InDesign Extension	EN DE	EN DE
Job Manager	EN DE	EN DE
Language Center	ONLINEHILFE	ONLINEHILFE

API descriptions and technical guides for specific topics are available on our Developer portal.

10.3 System Information

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

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



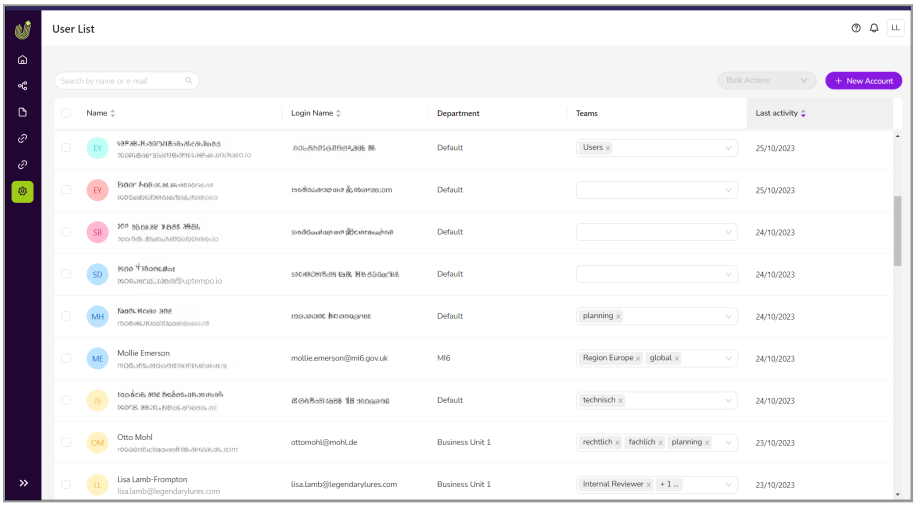
10.4 Reports and Statistics

You can use the functions provided under > *Administration* > *Overview* > *System Info* to create reports and traffic statistics. Using *System Info* > *Traffic* or *Other Statistics*, you can:

- determine the number of documents created per template,
- determine the number of documents created per organizational unit,
- determine the number of uploads and downloads per organizational unit,
- create a list of all customized documents,
- determine the number of logins per organization unit,
- check the size of individual virtual databases.

10.4.1 User Activity Assessment

Navigate to > *Administration* > *User List*, to display a table overview of users. Sort by *Last activity* column. This allows you to read whether the user has been logged in before. If the entry is empty and you have found an inactive user. Or you sort so that the newest date is on top. These users have logged in last. The entries are not live updated.



10.4.2 Assessing the Monthly Data Traffic

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

Prerequisites

You have the permission *Show Traffic*.

Traffic

Month	Size (MB)
2023-11	0.03
2023-09	0.5
2023-08	5.65
2023-07	15.53
2023-06	0.03

Overall data volume : 21.75 MB

10.5 Other Statistics

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

Prerequisites

You have the permission *Manage Statistics*.

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

10.5.1 Media Pool Statistics

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

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

- *Size of all VDBs*: The table overview displays the VDBs and their size (MB).
- *List of all media objects with at least one ISIN*: The table overview displays asset IDs and ISINs.
- *Number of downloads per organization unit*: The table overview displays the organizational units and number of downloads.
- *Number of uploads per organization unit*: The table overview displays the organizational units and number of uploads.
- *Number of downloads per media object*: The table overview displays the asset, asset ID, and number of downloads.
- *List of all DTP files (qxp, indd, doc, and pdf)*: The table overview displays fields for the asset ID, title, item number, category, configurable text field 1, configurable text field 2, last uploaded, last changed, and file type.
- *List of all non-DTP files (not qxp, indd, doc, or pdf)*: The table overview displays fields for the asset ID, title, item number, category, configurable text field 1, configurable text field 2, last uploaded, last changed, and file type.
- *List of all downloads*: The table overview displays the asset ID, title, item number, file type, organizational unit, login, and date. You can restrict the report by selecting a time range or by entering a time period (date).

10.5.2 Brand Template Builder Statistics

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

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

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

each document.

- *List of all personalized documents*: The table overview displays the title, affiliate ID, and document ID. You can restrict the report by selecting a time range or by entering a time period (date). Documents that are in progress and in the approval stage are not taken into account.
- *List of all finalized templates*: The table overview displays the title, template ID, the asset ID used as a basis, the category, the format, and the type. Documents that are in progress and in the approval stage and HTML templates are not taken into account.
- *10 topmost used media in documents*: The table overview displays the asset ID, asset version, asset title, and number of usages.
- *10 topmost used media in templates*: The table overview displays the asset ID, asset version, asset title, and number of usages.
- *Number of templates using the FCK editor*: The table shows all of the editor configurations and the number of templates that use these configurations in at least one variable.
- *Templates using the FCK editor*: For each editor configuration, the table displays a list of the template IDs that use this configuration in at least one variable.

10.5.3 Administration Statistics

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

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

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

10.5.4 Marketing Shop Statistics

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

Note

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

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

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11

Appendix

11.1 Permissions

This chapter provides descriptions of the relevant permissions for certain modules and roles. The permission model grants the application access to certain data objects.

11.1.1 Administration

11.1.1.1 User Area

Name	Description	Notes
Manage Own Affiliate	From the *Your user name > Edit affiliate* area, the user can change the assignment to an affiliate if several affiliates are assigned to the user.	
Publish Distribution Lists	The user can share their distribution list.	
Delete Any Distribution List	The user can also delete third-party distribution lists.	Note that each user can delete their own distribution lists.

Permissions needed for substitutes

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

- Media Pool: *Module Access*, *Approve Media*
- Brand Template Builder: *Module Access*, *Approve Documents*, *Approve Templates*

11.1.1.2 Administration area

Name	Description	Notes
Add Category	Enables the user to create new asset categories.	The permission *Manage Category Tree* is also required to access the category tree.
Application Configuration Basic	The user can access and view the following menu items: *> Administration > Overview > System Configuration > System Settings*: The user can change the system settings. *> Administration > Overview > System Info > Module Overview* *> Administration > Overview > System Info > System Info*	The user can only see permissions that are assigned to the setting BASIC.
Assign User Groups	The user can access the *> Administration > Overview > Users & Groups > User Assignment* page and assign users to a user group or remove them from a user group.	
Create Task Templates	Users can access and use the *> Administration > Overview > Datasheet Engine > Task Templates* page in the administration area.	

Name	Description	Notes
Import Export Custom Structures	The user can navigate to > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Import & Export* in order to export and import custom objects and structures.	
In Login Approver List	Users with this permission are listed as internal contact persons when an account is requested by an external user.	
Manage Affiliates	The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Affiliate Data* page and edit objects with a custom structure that is assigned to an affiliate structure.	
Manage Category Approvals	Allows managing category approvals. The user can access the > *Administration* > *Overview* > *Approvals* > *Categories* page and manage category requests.	To create new categories, the user also requires the permission *Add Category*.
Manage Category Tree	Allows managing the category tree. The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > *Approvals* > *Categories* page and manage existing themes.	The user also requires the permission *Add Category*.

Name	Description	Notes
Manage Cell Styles	The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Cell Styles* page and manage and create cell styles.	
Manage Character Styles	The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Character Styles* menu item and manage and create character styles. The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Extract Styles* page and extract styles.	
Manage Colors	The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Colors* page and manage colors.	

Name	Description	Notes
Manage Company Calendar	In *My Extended Settings*, users can view the *Absences* page and access calendars that are displayed company-wide or for specific user groups only.	
	The user can access the > *Administration* > *Overview* > *Users & Groups* > *Company Vacations and Public Holidays* page and is allowed to create, import and manage calendars on that page.	
Manage Contact Info	The user can create the contact page for the first time by clicking > *Service* in the top information area. To change an existing *Contact* page, you have to go to > *Administration* > *Overview* > *System Configuration* > *Service Menu*. You can edit *Contact* in the *Standard Help & Info Links* area on the left of this page by clicking the pencil icon next to it.	
Manage Content Services	The user can access the > *Administration* > *Overview* > *Brand Templates* > *Content Services* page and edit existing content services or create new ones.	
Manage Context Help	The user can edit context help.	The permission *Manage Related Links* is also required.

Name	Description	Notes
Manage Custom Objects	The user can open the > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects* page. The user can create new objects and edit existing ones.	
Manage Custom Structures	The user can open the > *Administration* > *Overview* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Structures* page. The user can create new structures and edit existing ones.	
Manage Custom Template Properties	The user can access and edit the > *Administration* > *Overview* > *Brand Templates* > *Custom Properties* page.	
Manage Custom Watermark	The user can access the > *Administration* > *Overview* > *Assets* > *Rendering* > *Watermark* page and use all of the functions on this page.	
Manage Database	The user can access the > *Administration* > *Overview* > *System Maintenance* > *Maintenance Functions* page and correct asset versions or update PDF links, for example.	

Name	Description	Notes
Manage Detailed View	The user can access the > *Administration* > *Overview* > *Assets* > *Result Configuration* > *Detailed View* page and configure the detailed views for assets.	
Manage Document Creation Properties	The user reaches > *Administration* > *Overview* > *Brand Templates* > *Document creation* and can edit the page.	
Manage Document Sizes	The user can access > *Administration* > *Overview* > *Brand Templates* > *Standard Formats* and create, change, and delete document formats.	
Manage Download Schemes	The user can access the > *Administration* > *Overview* > *Assets* > *Rendering* > *Schemes* page and edit existing rendering schemes or create new ones.	
Manage Editor Configurations	The user can open the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Configuration* page and create and edit editor configurations.	

Name	Description	Notes
Manage Editor Presets	The user can open the > *Administration* > *Overview* > *Brand Templates* > *Editor Presets* page and edit the settings made in Brand Template Builder for the document editor and customizing wizard, as well as create new editor settings.	
Manage Email Notification	The user can access the > *Administration* > *Overview* > *Datasheet Engine* > *Types* > *E-Mail Management* page during datasheet layout of a type and select variables with values that are to be sent automatically via e-mail when there is a workflow change.	
Manage Email Service	The user can access and edit the > *Administration* > *Over-view* > *System Configuration* > *E-Mail Service* page.	
Manage Email Templates	The user can access and edit the > *Administration* > *Over-view* > *Look & Feel* > *E-mail Templates* page.	
Manage File Extensions	The user can access the > *Administration* > *Overview* > *Assets* >*General Configuration* > *File Formats* page and edit the list of supported file extensions.	

Name	Description	Notes
Manage Fusion Apps	The user can access and edit the pages under > *Administration > Overview > Fusion > UX Logic*.	
Manage General Terms And Conditions	The user can access the > *Administration > Overview > Users & Groups > Terms & Conditions* page and create and edit the general terms and conditions text for all deployed languages.	The system setting *General terms and conditions* must be set to activated for the menu item *Terms & Conditions* to be visible.
Manage Jobs	The user can access > *Administration > Overview > Datasheet Engine* and all underlying pages and edit the settings available there.	Note: In versions prior to 8.0, this access was provided by several permissions. When changing to version 8.0 or later, you must adapt roles with access to > *Administration > Overview > Datasheet Engine*.
Manage Keywords	The user can open the > *Administration > Overview > Approvals > Keywords* page and manage keywords.	
Manage Licenses	The user can access the > *Administration > Overview > Assets > Asset Licenses* page and create and edit licenses.	

Name	Description	Notes
Manage Maintenance Message	The user can access the > *Administration* > *Overview* > *System Maintenance* > *Maintenance Notification* page and create and edit maintenance notifications.	
Manage Manuals	The user can access the *Administration* > *Overview* > *System Info* > *Manuals* page and download or open documentation.	
Manage Media List View	The user can access and edit the > *Administration* > *Overview* > *Assets* > *Result configuration* > *List Result* page.	The configured settings are applied to all users.
Manage Module Names	The user can access and edit the page > *Administration* > *Overview* > *Look & Feel* > *App & Navigation Names.*	
Manage MP Search Configuration	The user can access the > *Administration* > *Overview* > *Assets* > *Search Configuration* > *Search Index* and > *Default Views* pages and configure and manage the search function in the Media Pool.	
Manage Navigation	The user can access the > *Administration* > *Overview* > *Look & Feel* > *Navigation* page and define the order of and links to modules in the top navigation, among other things.	

Name	Description	Notes
Manage OrgUnit	The user can open the > *Administration* > *Overview* > *Users & Groups* > *Organizational Units* page and create and edit organizational units.	
Manage Output Methods	The user can access the > *Administration* > *Overview* > *Brand Templates* > *Output Methods* page and rename the output methods created in the system.	
Manage Own Org	The user can open the > *Administration* > *Overview* > *Users & Groups* > *Organizational Units* page and edit his or her own organizational units and lower-level organizational units.	
Manage Paragraph Styles	The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Paragraph Styles* menu item and manage and create paragraph styles. The user can also call the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Extract Styles* page and extract styles.	

Name	Description	Notes
Manage Password Blacklist	The user can access the > *Administration* > *Overview* > *Users & Groups* > *Password Blacklist* menu item and edit the blacklist (by adding or removing passwords).	
Manage Price Lists	The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > *Price Lists* page and manage price lists for advertising material production or for Shop items.	
Manage Print Agencies	The user can access the > *Administration* > *Overview* > *Brand Templates* > *Printing Services* page and manage the print agencies stored in the system or create new ones.	
Manage Products	The user can access the > *Administration* > *Overview* > *Datasheet Engine* > *Other Settings* > *Data Hub* menu item and edit the page.	Note: In versions prior to 8.0 this access was provided by several permissions. When changing to version 8.0 or later, you must adapt roles with access to > *Administration* > *Overview* > *Datasheet Engine*.

Name	Description	Notes
Manage Related Links	The user can access and edit the functions that can be accessed with the *Service* button. Allows you managing related links.	
Manage Roles	The user can access the > *Administration* > *Permissions* page and create new roles or manage existing ones.	
Manage SAML Configuration	Lets the user configure Security Assertion Markup Language (SAML) authentication settings.	
Manage Service Menu	The user can access > *Administration* > *Overview* > *System Configuration* > *Service Menu*.	
Manage Skin	The user can access the > *Administration* > *Overview* > *Look & Feel* > *Desktop Skinning* page and edit the skinning on this page.	
Manage SSO Groups	The user can navigate to the page > *Administration* > *SSO groups* and create, edit and delete SSO groups.	
Manage Statistics	The user can access the > *Administration* > *Overview* > *System Info* > *Other Statistics* page and produce reports for the different modules.	

Name	Description	Notes
Manage System Messages	The user can access the > *Administration* > *Overview* > *System Maintenance* > *User Messages* page and create and send system messages.	
Manage Table Styles	The user can access the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Table Styles* menu item and manage and create table styles. The user can also call the > *Administration* > *Overview* > *System Configuration* > *Rich Text Editor* > *Styles* > *Extract Styles* menu item and extract styles.	
Manage UI Languages	The user can access and edit the > *Administration* > *Overview* > *Look & Feel* > *UI Languages* page.	
Manage User	The user can navigate to the page > *Administration* > *User List* and access the user administration. The user can create new users and edit existing accounts. The user can assign roles under the account tab *Permissions*.	

Name	Description	Notes
Manage User Groups	The user can access the > *Administration* > *Overview* > *Users & Groups* > *User Groups* menu item and create a new user group and rename or delete an existing user group.	
Manage User Own Org	The user can navigate to the page > *Administration* > *User List* and access the user administration. This permission allows the user only to edit users from their own organizational unit. New users cannot be created with this permission.	
Manage Valid Fonts	The user can access the > *Administration* > *Overview* > *Assets* > *General Configuration* > *Font Whitelist* menu item and edit the list of valid fonts.	
Manage VDB Groups	The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > *Virtual Database Groups* page and create new VDB groups or edit existing ones.	

Name	Description	Notes
Manage Video Transcoding	The user can access the > *Administration* > *Overview* > *System Maintenance* > *Video Transcoding* page. The user can cancel active transcodings, restart failed transcodings and download the asset of a successfully completed transcoding.	
Manage Virtual DataBase	The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > menu item and create a new VDB or delete existing VDBs (Storage group).	
Manage W2P Search Configuration	The user reaches > *Administration* > *Overview* > *Brand Templates* > *Search Configuration* and can access *Search Index* and *Default View* under that area.	
Manage Web Publishing	The user can access the > *Administration* > *Overview* > *Assets* > *External Service* page and configure the public-ation of the asset types that exist in the system.	
Manage Workflows	The user can access the > *Administration* > *Overview* > *Data Structures & Workflows* > *Workflows* page and create new workflows and edit existing ones.	

Name	Description	Notes
Migrate Types	Due to numerous changes in Types, administrators are required to migrate Types for each system upgraded to 7.3 or later. The page > *Administration* > *Overview* > *Data-sheet Engine* > *Maintenance* > *Migrate Types* displays the list of types and configurations that need to be migrated.	New administration page: > *Data-sheet Engine* > *Maintenance*. Mandatory type migration after an update. See Job Manager Administration Guide for details.
Module Access	The user can access > *Administration*.	The user always requires this permission to access a module.
See All Personal Data	The user sees not only the first and last names of other users, but also other personal data, for example e-mail address or organizational unit. You need to be aware of and comply with the General Data Protection Regulation (GDPR).	This permission facilitates the visibility of personal data. There-fore, only assign it to the neces-sary and appropriately trained users.
See Module Navigation	The navigation bar is displayed for the user.	
Show Traffic	The user can access the > *Administration* > *Overview* > *System Info* > *Traffic* menu item and view the monthly data volume for the system.	

11.1.2 Permissions for Plan and Spend

To give users access to the Uptempo Plan and Spend pages in the main navigation, users need a role to which the following permissions are assigned accordingly.

Uptempo Plan

Name	Description	Notes
Module Access	The user reaches the page > *Activities* in the main navigation.	

Uptempo Spend - Budget

Name	Description	Notes
Module Access	he user reaches the page > *Budget* in the main navigation.	

Uptempo Spend - Investments

Name	Description	Notes
Module Access	he user reaches the page > *Investments* in the main navigation.	

Uptempo Spend - Insights

Name	Description	Notes
Module Access	he user reaches the page > *Insights* in the main navigation.	

Uptempo Spend - Strategy

Name	Description	Notes
Module Access	he user reaches the page > *Strategy* in the main navigation.	

11.1.3 Media Pool

The permissions are listed and explained in the module specific administration manual.

11.1.4 Smart Access

Name	Description	Notes
Manage All	The user can edit all times, regardless of their visibility.	Users with the permissions *Manage All* and *Manage Own* cannot maintain Smart Access from the Service menu: • Deactivate edit mode • Import and Export • Go to page • Create new page • Edit page options • Copy current page • Delete current page
Manage Own	The user can edit all visible tiles.	

<table>
<tr><th>Name</th><th>Description</th><th>Notes</th></tr>
<tr><td>See Media Pool Tile View</td><td>The user can see the tiles on the Media Pool start page.</td><td rowspan="3">There is no Module Access permission for Smart Access. To be able to access Smart Access, the user must have all three rights on the left.</td></tr>
<tr><td>See Tile View</td><td>The user can view the tiles on the Media Pool/Brand Template Builder start page and the navigation for Smart Access in the module navigation.
A user who does not have this right cannot see Smart Access in the module navigation but can call Smart Access using a link.</td></tr>
<tr><td>See Web 2 Print Tile View</td><td>The user can see the tiles on the Brand Template Builder start page.</td></tr>
</table>

11.1.5 Brand Template Builder

The permissions are listed and explained in the module specific administration manual.

11.1.6 Marketing Shop

Name	Description	Notes
See Advanced Search	The user can see the *Advanced search* tab and can access it.	

Name	Description	Notes
See Navigation	The user can access the start page of the Shop module on the navigation bars, the teasers and the search function.	
Manage Cata-logue	Under > *Shop* > *Content*, the user can access the > *Catalog* and > *Catalog groups* areas.	The URL of the item becomes visible.
See Template Option	The user can decide whether a template in *Brand Template Builder* module that is placed in the shop-ping cart will be customized immediately or later. Without this permission, the item is opened directly in the customizing wizard without further prompts.	
See CMS Menu	A menu button is displayed for the user. The user can add CMS content, edit content, and delete content.	
See Content Areas	Under > *Shop* > *Content*, the user can call and use the > *Teaser*, > *Theme page*, > *Order lists*, > *Categories*, and > *Filters* areas.	The URL of the item becomes visible.
Update Print Schema Name	The user can change the name of a PDF export schema if the *Editable headline text* checkbox is enabled for the selected PDF export schema.	
View Equipment Report	From the > *Shop* > *Statistics* area, the user can create a report about the maintenance and reservation of equipment and download it as a CSV file.	

Name	Description	Notes
Book For Affiliate	The user can make bookings (or view and cancel bookings) for other users that belong to the affiliate that is currently active for him or her.	
Book For External	The user can make bookings (or view and cancel bookings) for other users that belong to the same organizational unit.	
Book For All	This permission contains the two permissions above in full. The user can make bookings (or view and cancel bookings) for all system users, regardless of whether they are flagged as internal or external.	
Book For Orgunit	The user can make bookings (or view and cancel bookings) for other people that are not registered as users in the system by specifying their name and e-mail address.	
Manage Settings	The user can call the > *Shop* > *Settings* area and use the functions grouped under it (e.g. > *Custom Fields*, > *Item types*, > *Delivery states*, or > *Statistics mailing*).	
View Notifications	The user receives the e-mails sent via the Marketing Shop module concerning the interface.	
Access Module	The user can log into the Marketing Shop module and access the module.	Each user that is to use the Marketing Shop module requires this permission.
Manage Products	The user can access > *Shop* > *Settings* > *Item administration* and add new entries or edit existing entries.	
Manage Countries	The user can call > *Shop* > *Settings* > *Countries* and add new entries or edit existing entries.	

Name	Description	Notes
Manage Curren-cies	The user can call > *Shop* > *Settings* > *Currencies* and add new entries or edit existing entries.	
Archive Orders	The user can archive orders.	One of the following permissions is also required: *Manage All Orders*, *Manage Orgunit Orders*, *Manage Own Orders*, *Manage Supplier Orders*.
Order Any Quant-ity	The user can order haptic items in one piece or in a quantity independent of the package size and pack-ing unit.	This is used only if the system setting *order in pieces* = true is set. For more information, please contact your system administrator. The user also requires a permission for ordering (shopping cart).
Manage Affiliate Orders	The user can call the order history and edit orders of all ordering parties and all vendors.	This permission overwrites *Manage All Orders*, *Manage Orgunit Orders*, *Manage Own Orders*, *Manage Supplier Orders*.
Manage All Orders	The user can call the order history and edit all orders of his own affiliate.	This permission enhances other Manage permissions.

Name	Description	Notes
Manage Orgunit Orders	The user can display his or her own orders in the order overview. The status cannot be edited.	This permission enhances other Manage permissions.
Manage Own Orders	The user can call the order overview and see all the orders that have gone to the user's own supplier. If a supplier is not assigned to his or her user account, the user does not see any orders.	This permission enhances other Manage permissions.
Manage Supplier Orders	If the shopping cart is configured so that a user on a higher level in the hierarchy has to approve the shopping cart, the user on the higher level in the hierarchy must have this permission. With this permission, the user can call the order history and edit all orders in his or her own organizational unit.	This permission enhances other Manage permissions.
Manage Print Schema	The user can call the function > *Shop* > *Content* > *PDF export schema* function and define how and with what attributes an item list can be printed.	
Approve Products	The user can approve an item for the Marketing Shop module.	The user also requires one of the following: *Manage All Conflict List*, *Manage Own Conflict List*:
Delete Products	The user can delete all items that he can access.	Deleting means archiving here. Items are not deleted. The user has read-access to archived items through > *Shop* > *Items* > *Administration filter* > *Archive*.

Name	Description	Notes
Manage All Conflict List	The user can call > *Shop* > *Items* and access the item conflict list from there. The user can create new items.	
Manage Own Conflict List	The user can call > *Shop* > *Items* and access the item conflict list from there. Users can edit items in their catalog list. If the user is assigned to a supplier, the user can only edit the data of this supplier for the item.	If an item is delivered by multiple suppli-ers, users with this permission can view only the supplier fields for their own supplier and the general system fields. Furthermore, only their own items are visible.
View Products Report	Under > *Shop* > *Statistics*, the user has access to the reports > *Download*, > *Search*, > *Synchronization*, and > *Orders*.	
Rate Products	The user can rate an item.	To rate an item, the rating function must be activated for the item.
View Ratings Report	The user can see the available item ratings under > *Shop* > *Statistics*.	

Name	Description	Notes
View Awaited Products	From the > *Shop* > *Items* area, the user can call the > *Goods receipt* > *Expected items* menu item. Items that will be delivered soon are displayed.	The user requires one of the *Manage All Conflict List*, *Manage Own Conflict List* permissions.
See Account Info	The user can view payment and billing information (e.g. the account number or bank code) for the orders that he or she can access.	
Approve Shop-pingcart	The user can approve an order.	The user also requires the permission *View Pending Shoppingcarts*.
Order Shop-pingcart	The user can submit their own orders.	This permission overrides the permission *Request Shoppingcart*.
Request Shop-pingcart	The user can request an order for approval, but cannot approve it himself.	This permission is overridden by the permission *Order Shoppingcart*.

Name	Description	Notes
View Pending Shoppingcarts	The user can view orders or shopping carts that have been requested or rejected via the order archive. Users with this permission cannot order shopping carts (the permission Order Shoppingcart is required to order them). To call other functions from the overview (for example, to approve orders from the overview or change an order status), additional permissions are required. The permission *View Pending Shoppingcarts* can be combined with other permissions as follows: • With *Request Shoppingcart*, without *Order Shoppingcart*: Users can view their own requests that have not been approved and rejected yet. • With *Approve Shoppingcart*: Users can view requests that they are to approve.	This permission is recommended for the following roles: Administrators, approvers, requestors.
Transfer Shoppingcart	The user can use the *Transfer cart* function to transfer full shopping carts (including all of the necessary items) to other users.	
View Supplier Details	The user can call the > *Shop* > *Supplier* menu item. The user cannot create or edit a supplier; instead he or she can only call the detailed view of the existing suppliers that supply the items for the catalog group to whom the user is assigned.	
Manage All Stocks	The assignee can adjust the item stocks. To edit other item information, the *Manage All Conflict List* permission is required.	This permission is overridden by the permission *Manage All Conflict List*.
Manage Own Stocks	The assignee can adjust the stocks of items of his own supplier.	This permission is overridden by the permission *Manage All Conflict List*.

Name	Description	Notes
Manage Supplier	The user can view and edit suppliers and add new suppliers.	
View Under-delivery	The user can call the *Underdelivered* item conflict list via > *Shop* > *Items* in the left-hand navigation pane.	The user also requires one of the permissions *Manage All Conflict List* or *Manage Own Conflict List*.
See Navigation	In the Shop module, the user can see the left navigation bar, from which he or she can call items arranged by defined categories, for example.	This permission has no effect on the left-hand navigation pane in > *Shop* > *Items*.
View Watchlist	The user can call the > *Shop* > *Favorites* area and use the functions displayed there.	

11.1.7 Marketing Planner

General permissions

Name	Description	Notes
Module Access	The user can access the Marketing Planner module.	

Permissions for the Detailed View

Name	Description	Notes
Element General Read	The user can view the *General* tab but not edit it.	
Element General Write	The user can edit the *General* tab (that is, (add, change, or delete objects there) and comment the planning element.	
Element Activity Stream	The user can access the activity stream in the detailed view on the *General* tab.	
Element Target Read	The user can see the *Target Budget* tab, but cannot edit it.	
Element Target Write	The user can edit (add, modify or delete) the *Target Budget* tab.	
Element Marker Read	The user can view markers but not edit them.	
Element Marker Write	The user can edit markers (that is, add, change, or delete markers).	

Name	Description	Notes
Element Manage Watcher	The user can manage (add/remove) elements' watchers.	
Element Attachment Read	The user can view the *Attachments* tab but not edit it.	
Element Attachment Write	The user can edit the *Attachments* tab (that is, add, change, or delete attachments).	
Element Orders Read	The user can view the *POs* tab but not edit it.	
Element Orders Write	The user can edit the *POs* tab (that is, add, change, or delete orders).	
Element Invoice Read	The user can view the *Invoices* tab but not edit it.	
Element Invoice Write	The user can edit the *Invoices* tab (that is, add, change, or delete invoices).	

Name	Description	Notes
Element MDF Read	The user can view the *MDF* tab but not edit it.	The system setting *enabledMDF* = *true* must also be set. For more information, please contact your system admin- istrator.
Element MDF Write	The user can edit the *MDF* tab (that is, add and request MDFs).	
Element Fees Read	The user can see the *Fees* tab, but cannot edit it.	
Element Fees Write	The user can edit the tab *Fees* (assign fees to the planning element, edit or delete fees).	
Element Fees Overwrite	The user can override globally set fees on an planning element.	
Element Task Read	The user can view the *Tasks* tab but not edit it.	
Element Task Write	The user can edit the *Tasks* tab (that is, add, change, or delete tasks).	

Name	Description	Notes
Element Job Write	The user can add jobs on the *Tasks* tab.	The user also requires the following permissions in the Job Manager module: *Module Access* and *Create JM Request*
Element Dimension Read	The user can view the *Dimensions* tab but not edit it.	
Element Dimension Write	The user can edit the *Dimensions* tab (that is, open or edit dimensions).	
Element KPI Read	The user can view the *KPIs* tab but not edit it.	
Element KPI Write	The user can edit the *KPIs* tab (that is, add, change, or delete KPIs).	

Permissions for the Calendar

Name	Description	Notes
Element Write	The user can create elements in the tree structure in the calendar.	
Element Copy	The user can copy elements.	

Name	Description	Notes
Element Relocate	The user can cut out and move elements.	
Element Delete	The user can delete elements.	Users that have the permission *Manage Years* can delete years and the elements that they contain.
Element Assign External Resources	The user accesses the *Assign External Resource* function in the context menu of a planning element if a system whose resources are to be synchronized with the Marketing Planner has been specified in the system settings.	
Element Timeline Read	The user can view and copy timelines.	
Element Timeline Write	The user can create timelines, insert copied timelines and edit timelines.	

Permissions for the Budget

Name	Description	Notes
Budget Read	The user reaches the sub-area > *Planner* > *Budget* and can view values from the budget view.	

Name	Description	Notes
Budget Write	The user can add or change values in the budget.	To reach the sub-area > *Planner* > *Budget*, the user needs the permission *Budget Read*.
Manage Locked Budgets	The user can enable *Locking of Budgets* on the > *Planner* > *Settings* > *Budget Settings* page.	Furthermore, the user can edit the locking of past periods.
Manage Budget Default View	The user can define a default budget view for all users on the > *Planner* > *Settings* > *Budget Settings*page.	

Permissions for Tools

Name	Description	Notes
Import Budget Relevant Data	The user can import budget-related data under *Marketing Planner* > *Tools*.	
Access Change Log	The user can access > *Tools* > *Change log*.	This permission should be reserved for administrators.

Global Settings

The user reaches the *Settings* area when the user role has at least one of the following global settings permissions active. In this case, the user sees all subpages, but can edit only those for which the corresponding user role has been assigned the appropriate permissions.

Bezeichnung	Description	Notes
Manage Timeline Categories	The user can edit the area > *Marketing Planner* > *Settings* > *Categories*.	
Manage Calendar Structure	The user can edit the area > *Planner* > *Settings* > *Calendar*.	
Manage Element Types	The user can edit the area > *Planner* > *Settings* > *Element Types.*	
Manage Markers	The user can edit the area > *Planner* > *Settings* > *Markers*.	
Manage General Settings	The user can change settings for the "bottom-up/top-down" functions.	
Manage Years	The user can edit the area > *Marketing Planner* > *Settings* > *Years*.	
Manage Dimensions	The user can edit the area > *Marketing Planner* > *Settings* > *Dimensions*.	
Manage KPIs	The user can edit the area > *Marketing Planner* > *Settings* > *KPIs*.	
Manage Exchange Rates	The user can edit the area *Marketing Planner* > *Settings* > *Exchange Rate & Currencies*.	
Manage Fees	The user can edit the area > *Planner* > *Settings* > *Fees*.	

Permissions for the My Account Area

Name	Description	Notes
Manage Groups	The user can create, edit, or delete user groups on the sub-pages from > *Planner* > *Users*.	
Assign Groups To Users	The user can edit the assignment of users to groups under > *Planner* > *Users* > *Groups and Roles*.	
Assign Groups To Dimensions	The user can edit groups' access to dimensions: • Under > *Planner* > *Settings* > *Dimensions* in the dialogs *Add dimension* and *Edit dimension* in the *Access permissions* area • Under > *Planner* > *Users* > *Dimension Access*	This permission includes *Element Dimension Write*permission.
Assign Groups To Elements	The user can edit groups' access to planning elements: • In the detailed view of the *General* tab in the *Group* area • Under > *Planner* > *Users* > *Element Access*	
Manage MDF Approver	The user can edit the area > *Marketing Planner* > *My Account* > *Approvers*.	The system setting *enabledMDF = true* must also be set.

Permissions for Other Sections

Name	Description	Notes
Access Dashboard	The user can view *Marketing Planner* > *Dashboard*.	

Name	Description	Notes
Access Calendar	The user can view *Marketing Planner > Calendar*.	
Access Reports	The user can view *Marketing Planner > Reports*.	
Access Tools	The user can view *Marketing Planner > Tools*.	
Access Export Options	The user can use all export functions in the Marketing Planner, e.g. in the dashboard, the calendar or the budget view.	
Save Filter Views	The user can save views.	
Publish Filter Views	The user can publish saved views.	

> Note
>
> The sub-area > *Planner* > *Budget* is visible when the user has the permission *Budget Read*.

11.1.8 Job Manager

Name	Description	Notes
Access All Orgs	The user can view and access the objects of all of the organizational units.	Users that do not have this permission can view only the objects in their own organizational unit and lower-level organizational units.
Access Workflow Tab BPMN	The user sees the Workflow tab in the data sheet for jobs with BPMN workflow. This permission has no influence on jobs with the previous workflow function.	
Act like Assignee	The user can act like an assignee, regardless of whether the user is assigned to a job as a processor.	This permission should only be granted to administrators.
Act Like Creator	The user can act like a creator, regardless of whether the user is assigned to a job as a creator.	This permission should only be granted to administrators.
Act Like Participant	The user can act like a participant, regardless of whether the user is assigned to a job as a participant.	This permission should only be granted to administrators.

Name	Description	Notes
Admin JM Request	The user can access job details even if the user has not been assigned as the Creator, Assignee or Participant.	
Change JM Request	The user can change the creator of a job.	
Close JM Request	The user can cancel jobs.	
Copy Job	The user can copy a job.	The user also requires the permission *Create JM Request*.
Create JM Request	The user can create a new job, copy an existing job and change the owner of a job.	
Create Task Templates	The user can save the current task plan as a template for later use.	
Dearchive	The user can restore canceled or finished jobs in order to reactivate them.	
Delete JM Request	The user can delete jobs; that is, the job is flagged as deleted and can then only be accessed using the *Deleted Jobs* filter.	
Edit All Worklogs	The user can enter and change time expenditures for other users, assign time expenditures to other jobs and tasks, as well as delete their own and others' time expenditures.	Users without this permission can only create and change their own time expenditures.
Edit Any Org Grid Rows	When accessing tables, the user can edit all of the lines, regardless of the organizational units to which the lines are assigned.	

Name	Description	Notes
Edit JM Request	The user can forward or reject jobs in a workflow, add comments, and enter variables based on access permissions.	In addition to *Module Access*, this is a core permission that the user requires to carry out tasks in the Job Manager module.
Export XML	The user can export jobs. The export is based on the selected filter and is saved as an XML file.	
Finish JM Request	The user can finish jobs.	The job will then be flagged as *Finished* and can be found using the standard filter *Finished Jobs*.
Manage Filters	The user is authorized to use the advanced search to search for specific jobs or to permanently save the search as a custom filter.	
Manage Review	The user can start a review of an asset in a job using a variable of the type *Asset Selection* and use a quick decision to approve or reject the asset. Only users whose role has the permission view the review information in the permission pane of a data sheet.	
Manage Views	The user can change the columns and views in the search and filter results.	Without this permission, the user can only view the default settings or the settings of shared views.

Name	Description	Notes
Migrate Types	The user with this right can initiate the type migration. Due to numerous changes to the types in 7.3, it is necessary for administrators to migrate the types for each updated system. The page > *Administration* > *Overview* > *Datasheet Engine* > *Maintenance* > *Migrate Types* consists of the list of types and configurations that need to be migrated.	For more Informationen see Administration Manual of Job Manager.
Module Access	The user can call the Job Manager module.	
Publish Filter	The user can publish his or her own saved filters.	
See All Exports	The user can download the XML exports of all users.	
See All Module Themes	The user can view the entire category tree, regardless of the visibility settings configured under > *Administration* > *Overview* > *Data Structures & Workflows* > *Categories* for the Job Manager module.	
See All Worklogs	The user can view the worklogs of other users.	
See Any Org Grid Rows	When accessing tables, the user can view all of the lines, regardless of the organizational unit assignments.	Users that do not have this permission can view only lines that are assigned to their own organizational unit.

Name	Description	Notes
Select Type	The user can select a job type.	Without this permission, the user can only select the standard type and the briefing.
Skip Workflow Steps	The user can "move" a job backwards and forwards through a workflow regardless of its actual status.	
Undelete	The user can restore jobs that have been flagged as deleted.	
View Log	The user can view the processing history of a job and download it as an Excel list.	

The following deprecated permissions may still be displayed under > *Administration* > *Permissions* but assigning them to a role no longer has any functional effect:

- *Consume JMS Messages*
- *Show Blueprint Jobs*

11.1.9 Marketing Data Hub

Name	Description	Notes
Access All Orgs	The user can view and access the objects of all of the organizational units.	Users that do not have this right can view only the objects in their own organizational unit and lower-level organizational units.

Name	Description	Notes
Access Work-flowTab BPMN	The user sees the Workflow tab in the data sheet for data objects with BPMN workflow. The permission has no influence on data objects with the previous workflow function.	
Act Like Assignee	The user can act like an assignee, regardless of whether the user is assigned to a data object as an assignee.	This right should only be granted to administrators.
Act Like Creator	The user can act like a creator, regardless of whether the user is assigned to a data object as a creator.	This right should only be granted to administrators.
Act Like Parti-cipant	The user can act like a participant, regardless of whether the user is assigned to a data object as a parti-cipant.	This right should only be granted to administrators.
Admin DH Request	The user can access data object details even if the user has not been assigned to the data object as the Creator, Assignee or Participant.	
Change DH Request	The user can change the creator of a data object.	
Close DH Request	The user can cancel the workflow of a data object. Canceled data objects are displayed in the standard filter *Canceled Products*.	
Copy Product	The user can copy a data object.	The user also requires the right *Create DH Request*.

Name	Description	Notes
Create DH Request	The user can create a new data object and copy existing data objects. The user can also select a new owner.	
Create Task Templates	The user can save the current task plan as a template for later use.	
De archive	The user can restore canceled or finished data objects in order to reactivate them.	
Delete DH Request	The user can delete items; that is, the item is flagged as deleted and can then only be accessed using the *Deleted Products* filter	
Edit Any Org Grid Rows	When accessing tables, the user can edit all of the lines, regardless of the organizational units to which the lines are assigned.	
Edit DH Request	The user can forward or reject data objects in a workflow, add comments, and enter variables based on access rights.	In addition to *Module Access*, this is a core permission that the user requires to carry out tasks in the Marketing Data Hub module.
Export XML	The user can export data objects. The export is based on the selected filter and is saved as an XML file.	
Finish DH Request	The user can finish data objects.	The data object will then be flagged as *Finished* and can be found using the standard *Finished Products* filter.

Name	Description	Notes
Manage Filters	The user is authorized to use the advanced search to search for specific data objects or to permanently save the search as a custom filter.	
Manage Views	The user can change the columns and views in the search and filter results.	Without this permission, the user can only view the default settings or the settings of shared views.
Module Access	The user can call the Marketing Data Hub module.	
Publish Filter	The user can publish his or her own saved filters.	
See All Exports	The user can download the XML exports of all users.	This should only be granted to administrators.
See All Module Categories	The user can view the entire category tree, regardless of the visibility settings configured under > *Administration* > *Overview* > *Data Structures & Workflows* > *Categories* for the Marketing Data Hub module.	This should only be granted to administrators.
See All Worklogs	The user can view the worklogs of other users.	
See Any Org Grid Rows	When accessing tables, the user can view all of the lines, regardless of the organizational unit assignments.	Users that do not have this permission can view only lines that are assigned to their own organizational unit.
Select Type	The user can select an item type.	Without this permission, the user can only select the standard type and the briefing.

Name	Description	Notes
Skip Workflow Steps	The user can "move" a data object backwards and forwards through a workflow regardless of its actual status.	
Undelete	The user can restore deleted items.	
View Log	The user can view the processing history of an item and download it as an Excel file.	

11.1.10 Review Manager

The permissions are listed and explained in the module specific manual.

11.1.11 Brand Management Portal

Attention

Please note that all permissions must be maintained separately in the Brand Management Portal.

Name	Description	Notes
Module Access	The user can call the Brand Management Portal.	
Authoring Access	The user can call the service link for Magnolia Admin Central for the author instance.	

11.1.12 Reporting Center

Note that the assignment of authorizations in the Reporting Center is different from the assignment of permissions in other modules. Assign a role with the permission *Module Access* for the Reporting Center to each user. The user will be created as a user in the Reporting Center when they open the Reporting Center for the first time. You will then be able to manage users and roles in the Reporting Center.

Please refer to the documentation for the Reporting Center for more information.

11.2 System Settings

This chapter provides a description of the system settings that you can access on the interface as an administrator.

You can reach the system settings under > *Administration* > *Overview* > *System Configuration* > *System Settings*.

Please note that more system settings exist. Contact your Uptempo contact person for more information.

11.2.1 Administration

Name	Description
Account deac-tivation respite	Enter the number of days that the user is warned prior to the deactivation of his account via e-mail. If the value 0 is entered, then no notification is sent.
Affiliate ID valid-ation	Enter a regular expression to validate entered affiliate IDs.
Custom structure import user ID	Enter the ID of the user whose account is used to import custom structures and custom objects from an archive folder.
Custom structure import/export	Turn the import/export function for custom structures on or off.

Name	Description
Default coun-try/region	Choose the country or region that is assigned to each user as a default setting at the time that the user is created. The user can replace the default setting with a personal selection.
Default time zone	Choose the time zone that is assigned to each user as a default setting at the time that the user is created. The user can replace the default setting with a personal selec-tion.
Define forwarding address	You can set a redirect when calling CiPortal.do.
External SSO login creating user	Select whether a user is to be created per SSO by the third-party system.
External SSO login roles	Turn on or off whether the internal role names of the user are submitted per SSO in a comma-separated list for all modules. If the user has no role in a module, then no role name is submitted for this module. If the same role name is assigned in multiple modules, then the role name is only submitted once to the external application. The role names are submitted using the parameter GroupName.
General terms and conditions	Select whether the user must agree to the terms and conditions in order to obtain access to the system.
Hide logout button	Select whether the Logout button is shown.
Logout Redirect	To define where users navigate post-logout, input your desired URL. If left empty, the system automatically returns users to the login screen. URLs entered must be fully-qual-ified, beginning with https:// (for example: `https://company.com/home`). Note: When no destination is specified, users automatically return to the standard Uptempo login screen. Make sure the target page is accessible to logged out users.

Name	Description
Language default user interface	Select the default language of the user interface.
Multi-lingual text input	Turn text input in multiple languages on or off. Note: You can switch between languages in your operating system.
Password minimum length	Enter the minimum length of the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password minimum number numbers	Enter the minimum number of numbers in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password minimum number of lowercase letters	Enter the minimum number of lowercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Password minimum number of special char-acters	Enter the minimum number of special characters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.

Name	Description
Password minimum number of uppercase letters	Enter the minimum number of uppercase letters in the password. The value 0 means that there are no restrictions. Negative values or blank entries are interpreted as 0.
Preferred unit of length	Here, you define the unit of length that is used by default when creating a user.
Session time out	Enter the session timeout in minutes. The period begins to run after the last action of the user in the system. If the time runs out without any further action by the user, the user is automatically logged out.
SSO Button SSO	Turn the display of the SSO button on the login page on or off.
SSO e-mail address syntax check	Turn the syntax check for e-mail addresses on or off for login in via SSO.
SSO e-mail update mode	Select the update mode for the e-mail address if SSO is used to update the user data: • Do not update: The e-mail address is not updated. • Fill empty: The e-mail address will be updated if no address is entered. • Overwrite - The e-mail address is always updated.

Name	Description
SSO e-mail verification	Switch e-mail verification on or off. If verification is switched on, the user must confirm the submitted e-mail address.
SSO group match	Turn on or off whether a login per SSO is rejected if none of the submitted groups is found.
SSO group order	Enter a comma-separated list of SSO group IDs. Once an ID is entered, SSO groups are prioritized according to the IDs when logging in via SSO. If the system setting is empty, the functionality is deactivated.
SSO login form	Turn the login form on the login page on or off. The login form consists of the *User name* and *Password* fields as well as the *Login* button.
SSO service	Turn automatic forwarding to the authentication service on or off when visiting the login page. Forwarding is only executed for the IP addresses entered in *Administration: SSO service IP addresses*. The user is forwarded to the URL in *Administration: SSO service URL*.
SSO service URL	Enter the URL of the authentication service.
Substitutes toast message	Activate or deactivate reminder message for the users who have not defined substitutes yet.
Turn off notifications during delegation	Switch the notifications on or off during a delegation. If you activate the setting, delegating users will not receive system messages. If you deactivate the setting, users can specify in their profile settings whether they want to receive system messages during their delegation.

Name	Description
User activity anonymization	Turn the anonymization of the user activity statistics on or off.
VDB group auto-generation	Turn the auto-generation of VDB groups on or off. The auto-generation reads the VDBs that are either transmitted in the VDB groups via SSO groups or transferred in the directly transmitted VDB groups. A new VDB group is generated from the read VDBs.

11.2.2 Brand Management Portal

Name	Description
Magnolia author instance login mode	Select the login mode for the Magnolia author instance: • true = The login data of the currently logged-in user are used. • false = The data of the settings *Brand Management Portal: Magnolia author instance username* and *Brand Management Portal: Magnolia author instance pass-word* are used.
Magnolia author instance user name	Enter the user name of a Magnolia administrator. Note that this setting is only used if *Brand Management Portal: Magnolia author instance login mode* is set to false. By default, the user name *superuser* is entered.

Name	Description
Magnolia author instance password	Enter the password of a Magnolia administrator. Note that this setting is only used, if *Brand Management Portal: Magnolia author instance login mode* is set to false. By default, the password *superuser* is entered.
Magnolia page template	Enter the name of the template for the Magnolia page that is embedded in Media Pool.

11.2.3 Job Manager, Marketing Data Hub

Name	Description
Duration yellow phase	Enter the duration of the yellow phase of a workflow step in days. The yellow phase is the period directly before the due date of a workflow step. The workflow step has to be finished until the due date, otherwise the workflow step changes to the red phase. At the beginning of the yellow phase a reminder is sent by e-mail to the assignee of the workflow step.
Activate dependency of sub-jobs	You can define whether sub-jobs should have the same status change when the status of the parent job is changed to Cancelled, Finished or Deleted.

11.2.4 Media Pool

Name	Description
Maximum number of system messages	Enter the maximum number of system messages that are shown in the Media Pool.

For a description of other system settings, see the separate Media Pool administration manual.

11.2.5 Reporting Center

Name	Description
Dashboard - Standard Dashboard	Enter the path to the dashboard to be displayed by default in the Reporting Center. Please note that the dashboard must be saved under Forganizations/Forganization/Reporting_Center/Dashboards.

11.2.6 Review Manager

The system settings for Review Manager are listed and explained in the separate manual.

11.2.7 Smart Access

Name	Description
Activation start page	Turn the activation of the Smart Access start page on a recall of Smart Access on or off. If the function is switched on, the user is always redirected to the Smart Access start page when recalling Smart Access. If the function is switched off, then the system stores the last visited Smart Access page of the current session. When recalling Smart Access, then the user is redirected to the last visited Smart Access page.

11.2.8 Brand Template Builder

For system settings for *Brand Template Builder* module, see the separate administration manual of the module.

