Uptempo

Jobs

User Manual

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First Steps

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

You can use the *Jobs* module to map the campaign as a job, for example. By defining specific work-flows, you can create project templates and use them to map the individual phases and the schedule. All information required for the campaign, such as quotations, responsibilities, concepts, or layouts, can be stored and managed directly in the job.

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

Target Group

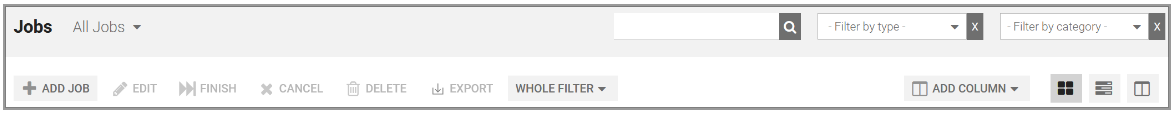
This manual is intended for users who want to plan and map marketing campaigns using the *Jobs* module.

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

User Roles and Permissions

You have different permissions and access levels depending on your user role. Most of the illus-trations in this manual are shown from the point of view of a user for whom almost all permissions are enabled in the user role for the *Jobs* module.

- Job overview when all permissions are assigned:



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

- The same view, with highly restricted access:

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

Which tabs and fields are visible or editable depends on the role you are assigned. If you as a user have only a limited range of available functions, this is generally the situation desired by your organization, so you can fully concentrate on your role, activity, and tasks in the *Jobs* module.

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

Some steps and functions described in this manual require advanced permissions in your user role for the *Jobs* module.

Recommended for New Users

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

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

Interaction With Other Modules and Functions

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

- You can start a review for a stored asset. This allows you to make coordination processes transparent. You can select an asset from the Media Pool and add it to the job.
- In the Plan & Spend part of Uptempo , you have the option of connecting and synchronize marketing activities with jobs. Refer also to the interfaces in General information.

1.1 General Information

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

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

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

In this chapter, you will learn about the key terms and functions of the *Jobs* module in the Uptempo platform.

What Is a Job?

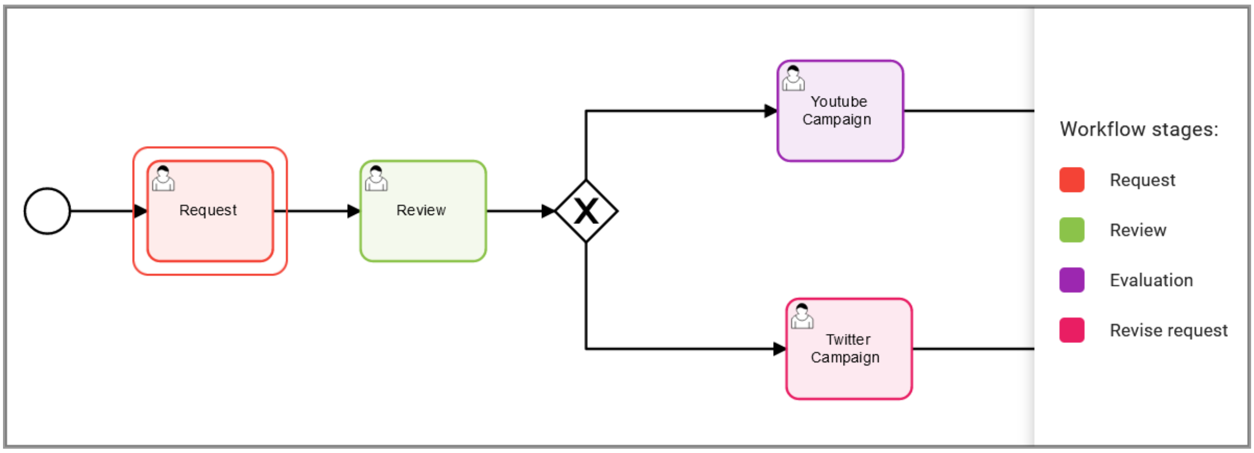
A job is a defined workflow that can be performed multiple times in order to achieve the desired work result. The overall process is represented by a BPMN workflow. The workflow can contain parallel or alternative paths.

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

Additional required tasks can be mapped by means of sub-jobs. A sub-job can use a different workflow that is independent of the parent element. Sub-jobs allow you to structure workflows and make dependencies between different workflows recognizable. See *Sub-Jobs or Processes* on page 48.

What Is a Workflow in Jobs?

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



When you create a new job in your system, you need to plan the individual workflow steps required to execute that job.

Example workflow

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

1. Create job: A marketing manager creates a new job. When creating the job, the marketing manager uses a suitable job template with tasks that represent the individual steps of the work-flow, e.g. *Research*, *Draft*, *Review*, *Release*, and *Publication* and variables that are linked to *Activities*.
2. Idea generation and information gathering: The marketing manager compiles information about the target group, the market, and the competition. Then a list of possible topics and content for the campaign is created. The marketing manager adds all relevant information and requirements to the data sheet. At all stages, the marketing manager can view the progress of the job at any time and intervene in the event of impending timeouts.
3. Prioritization and resources: The marketing manager assigns the job to a user or user group, e.g. the creative team. The team or responsible managers are notified by e-mail and in the soft-ware. The marketing manager sets start and end dates and a budget for the job.

4. Creation and review: The creative team creates the content (assets) for the campaign and uploads the data in the job. A team member marks the content as ready for review and the job is routed to the next step and reassigned to the marketing manager. If the review is negative and a new version is needed, the workflow step can be returned.
5. Follow-up on progress: The marketing manager reviews the content and provides feedback or requests changes. The creative team makes the changes and marks the task as complete.
6. Approval: When all tasks are complete, a responsible person approves or rejects the job and its assets.
7. Publication and metrics: Once approved, the creative team publishes the content to the desired channels. The creative team measures the results of the campaign and produces a report on the KPIs. The report is presented to the management.

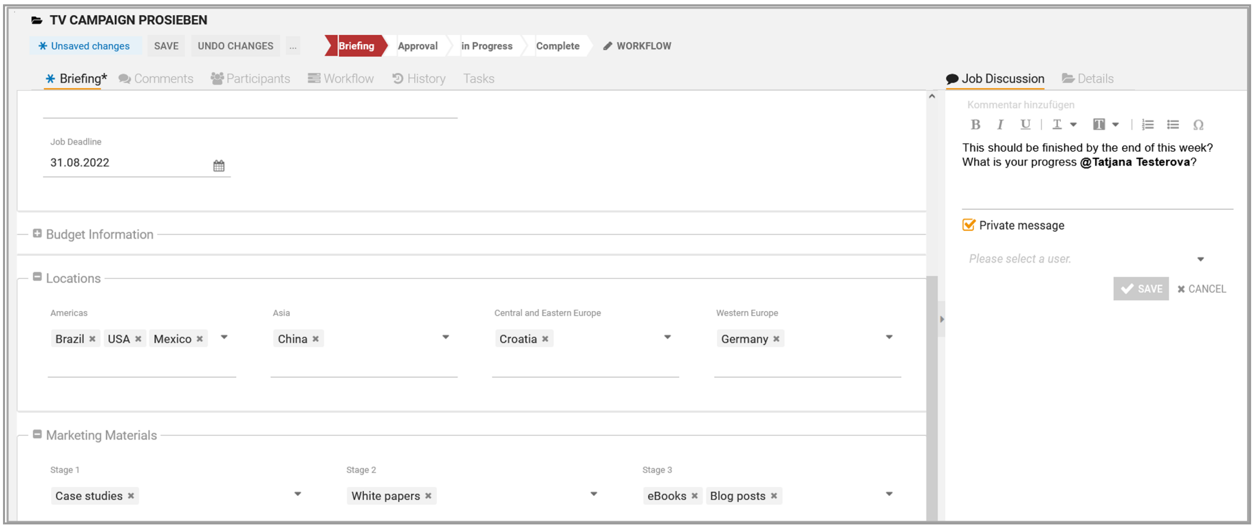
What Are Workflow Steps in a Workflow?

The workflow consists of various workflow steps, and each workflow step is assigned to a user group. The task in a workflow step can be assigned to an assignee or a group of assignees who are responsible for completing the step in question.

After completing, the assignee forwards the workflow to the next step. See Workflows.

Data Sheet

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



The content, layout, and design of the data sheet are defined in advance by an administrator according to the specifications of your organization. See *Data Sheet* on page 34.

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

User Categories

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

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

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

Interfaces

- *Activities* in the Plan & Spend module let you digitally manage your activities timeline and planning. Activities can be connected and synchronized with configured workflows. This allows you to track how successful your marketing activities and campaigns are at any time. See Interaction with Activities.

1.2 Additional Documentation

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

- Media Pool User Help 8.0
- Review Manager User Help 8.0

1.3 Writing Conventions

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

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

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

2

Structure of the Module

This section explains the structure of the *Jobs* module and the data sheet.

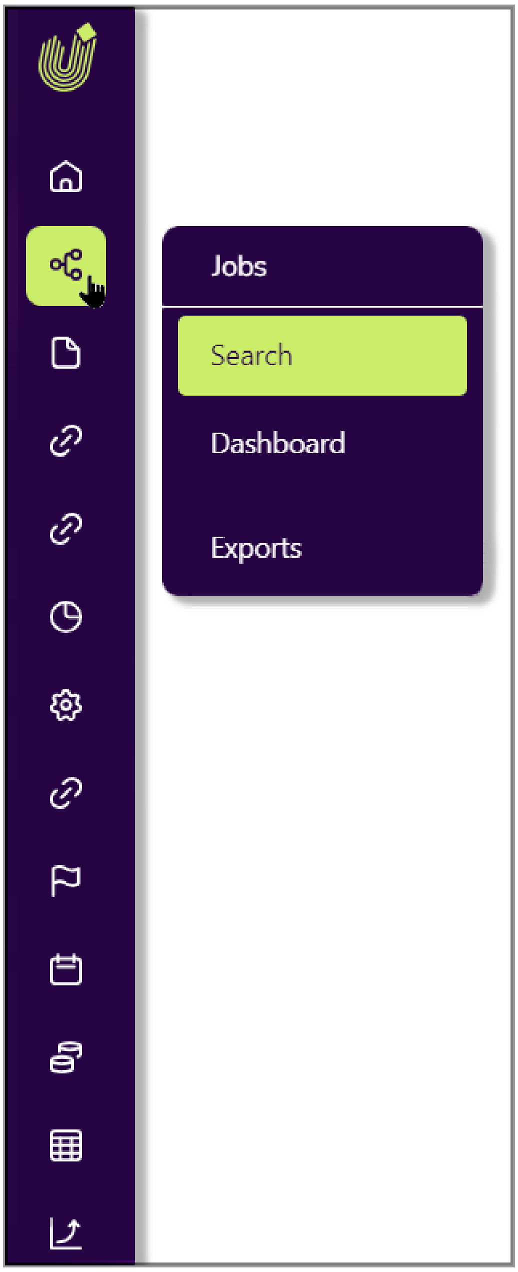
You will learn how to navigate the module and how the pages are structured. We will also show you what activities you can perform and where.

In addition, please read the following sections.

- *Navigation in the Module* on page 21
- *Dashboard* on page 22
- *Data Sheet* on page 34

2.1 Accessing the Module

If you click on > *Jobs* > *Search* in the left sidebar navigation, the start page of the module is displayed.



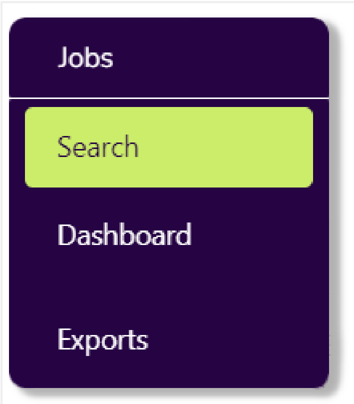
This takes you to the *Job Overview* on page 24 with all relevant jobs.

The first time you call up the overview, your active jobs are automatically displayed. This page may still be empty for you. You can adjust the content of the list using various filters or limit it using saved searches. See *Searching Jobs and Filtering Results* on page 64.

2.2 Navigation in the Module

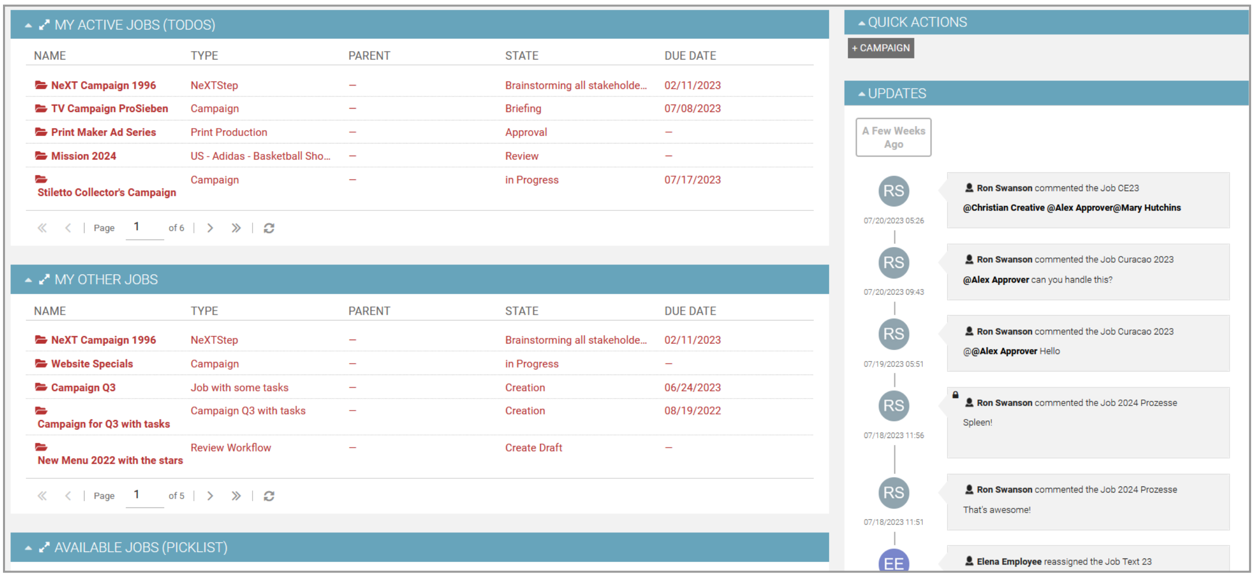
In the navigation of the module, you will find the following elements:

- Search, which will open job overview with search and filters.
- Dashboard, which provides a different perspective than the job overview.
- Exports, allowing XML exports.



2.3 Dashboard

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



- *My Active jobs (ToDos)*: This area lists all the jobs that you must actively process and to which you are assigned as an assignee.
- *My other jobs*: This list shows all jobs that you are involved in as a participant. A single job is only displayed in one of the two views – *My Active jobs (ToDos)* and tasks or *My other jobs* – at a time.
- *Available Jobs (PickList)*: Jobs are listed here to which no assignees are currently assigned. When you accept a job, a dialog box opens in which you can assign the job either to yourself or to a member of your group. The job will then be displayed to the selected member under *My Active jobs (ToDos)*. The *Picklist* option in the standard filters is comparable to this, but has the advantage that it is always available in the job overview.
- *[[[Nicht definierte VariableScreenCommands.jm.dashboard.panel.my_availaible_tasks.title]]]*: This has currently no function and will return at a later stage of development.
- *Jobs delegated to me*: This area displays jobs for which you are the registered substitute of the absent assignee. In these jobs, you take over the tasks for the delegating user that result from

the role as assignee of a job. You receive the permissions of the delegating user for this purpose.

- *Quick actions*: The user can use the quick actions to create jobs of a specific type directly, provided this type has been configured accordingly. Press the *Campaign* button to quickly create a frequently needed job based on a campaign template that has been defined accordingly by the administrator.
- *Updates*: This area lists all the notifications and discussion points for the jobs that are relevant to the user. Changes to reviews that were started in the job are also displayed here.

Note

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

Sort View

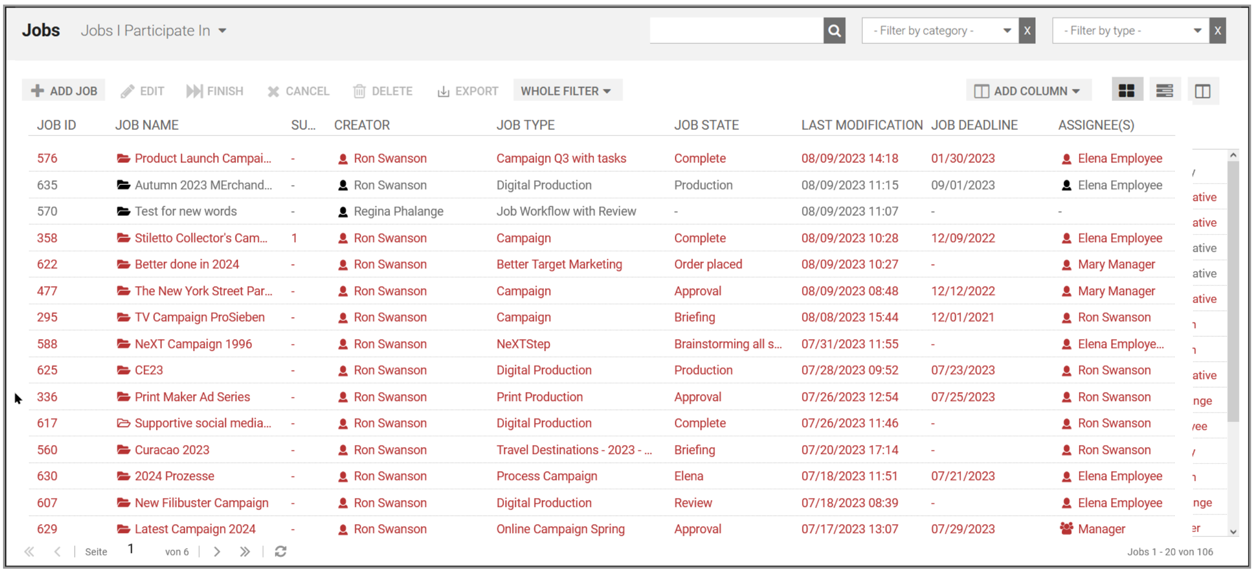
1. If you move the mouse over a column title, a ▾ menu appears.

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

This will return you to the usual job overview.

2.4 Job Overview

When you call up the *Jobs* module, the job overview is opened as the start page.



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

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

When you call the module for the first time, your active jobs are displayed by default. You can also display the result of another filter instead. Please also note *My Filters* on page 69.

For a detailed description of the different views, see *Display Formats in the Job Overview* on the facing page.

If you happen to be on one of the following subpages in the *Jobs* module: *Dashboard* or *Exports*, click on *Search* in the module navigation to return to the job overview. See *Navigation in the Module* on page 21

Associated Actions

- *Searching Jobs and Filtering Results* on page 64
- *Opening a Job* on page 81

2.4.1 Display Formats in the Job Overview

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

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

- Table
- Gantt chart
- Kanban view

> Note
>
> Your organization may have chosen to disable the Gantt and Kanban view options. If you are unsure, please contact your administrator.

Table: Quick Access and Comparison of Details

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

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

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

For information on how to change the table view, see *Customizing the Table View* on page 28.

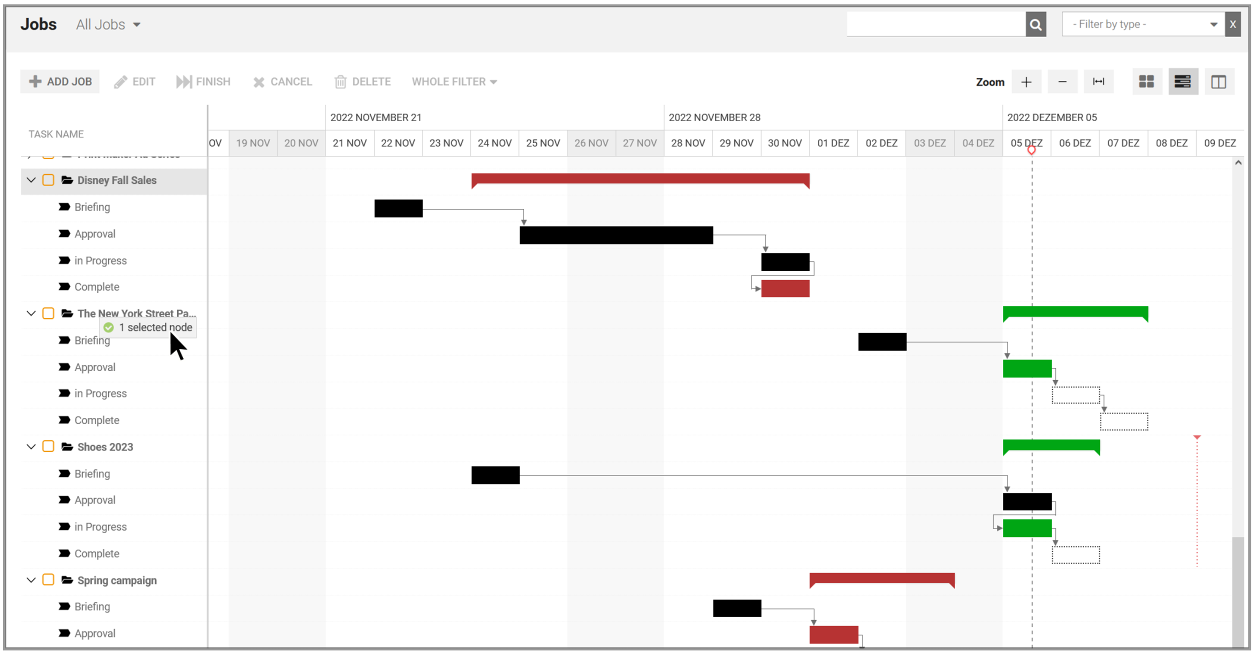
Gantt Chart: Chronological Progress and Interdependency

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

Different colors indicate the current status of the workflow steps:

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

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



- For an optimal view, use the zoom elements:
  

  Use the button on the far right to adjust the view to make the best possible use of the overall width.

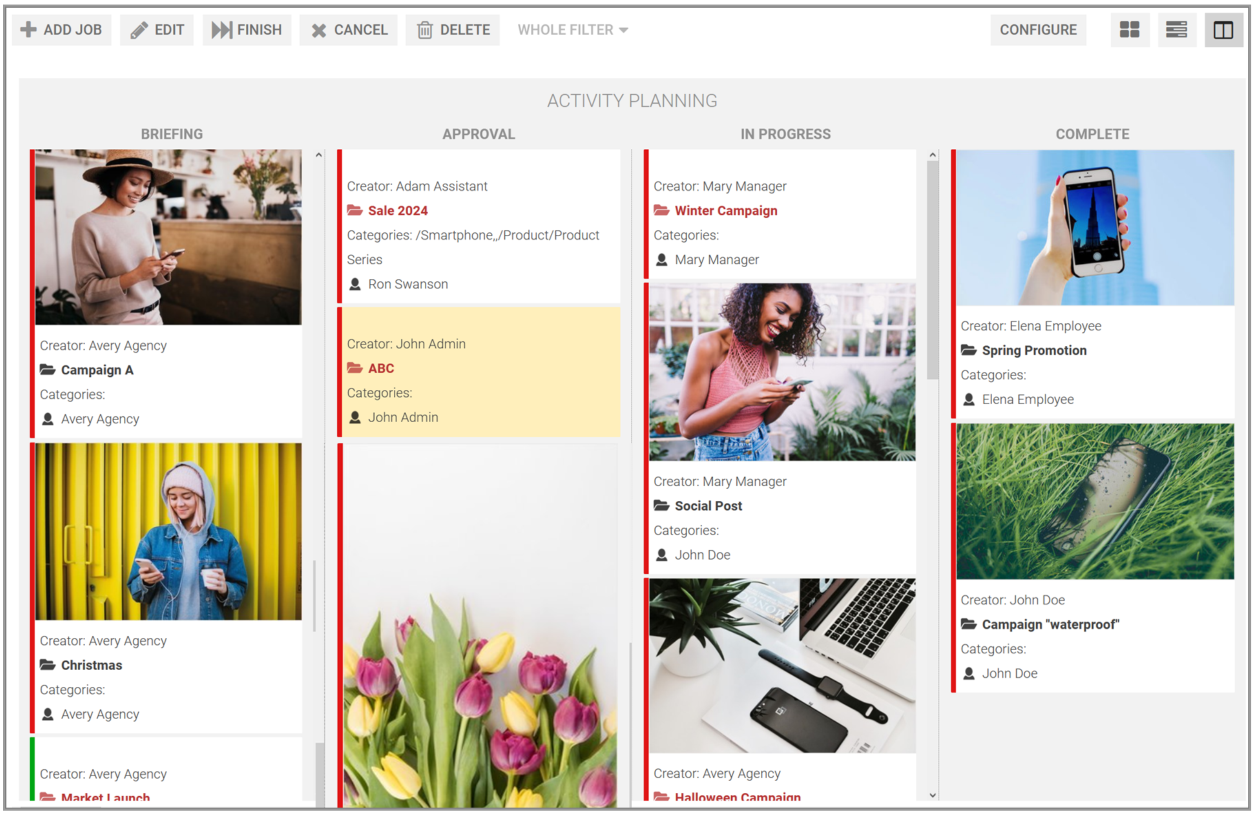
- The desired job completion date, if available, is shown using the following marker: 

Kanban View: Pending Tasks

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

> Note
>
> If you do not see the button to switch to the Kanban view, your organization may have disabled it.

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



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

You can configure the information displayed for the jobs.

Associated Tasks

- *Customizing the Table View* below
- *Customizing the Kanban View* on page 32

2.4.2 Customizing the Table View

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

Filter-Dependent Effects

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

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

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

Add column

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

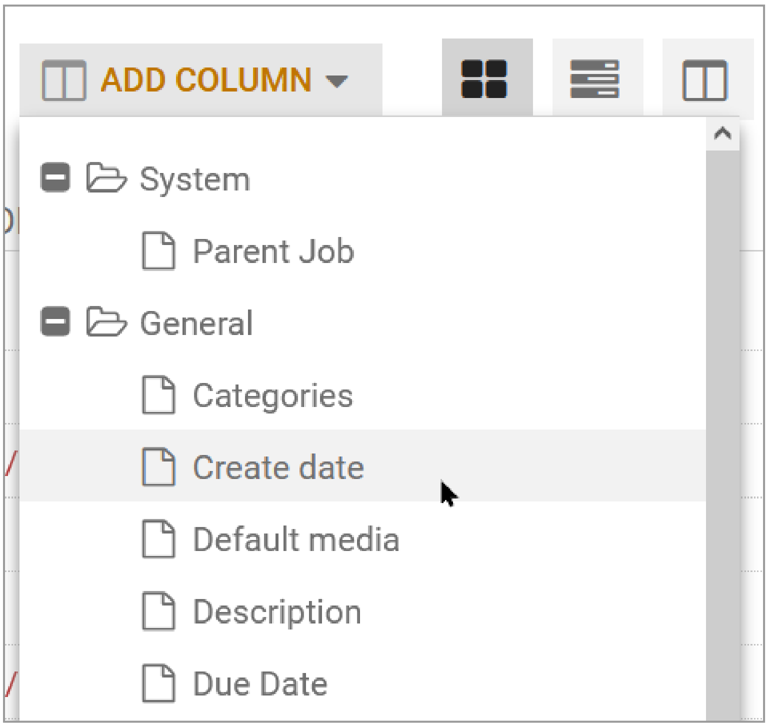
   The overview is reloaded.

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

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

   - *System*: You can select the number of sub-jobs belonging to the job or the name of the parent job.

- *General*: You can select any of the variables that have been flagged as "for all types."



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

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

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

The new columns are displayed in the table.

Remove Column

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

The overview is reloaded.

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

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

4. Navigate to ▾ > *Columns*.

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

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

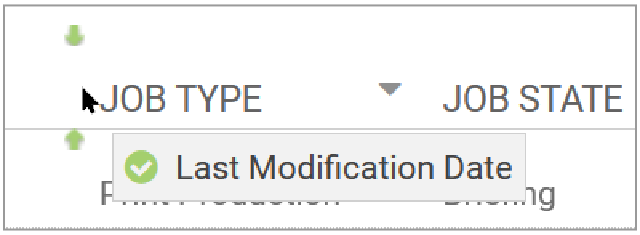
The columns are removed.

Reordering Columns

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

1. Use the mouse to click on and hold the column header of the column you want to reorder.
2. Drag and drop the column to the left or right.

   A green indicator shows where you can release the column.



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

You have reordered the column view.

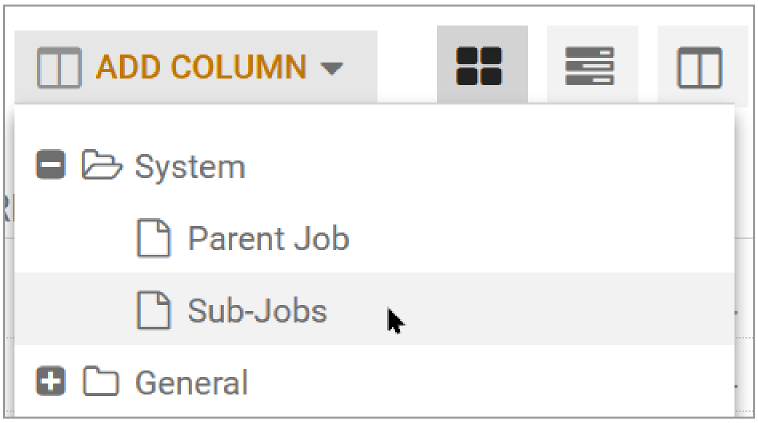
2.4.2.1 Adjusting the View

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

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

Highlighting the sub-jobs

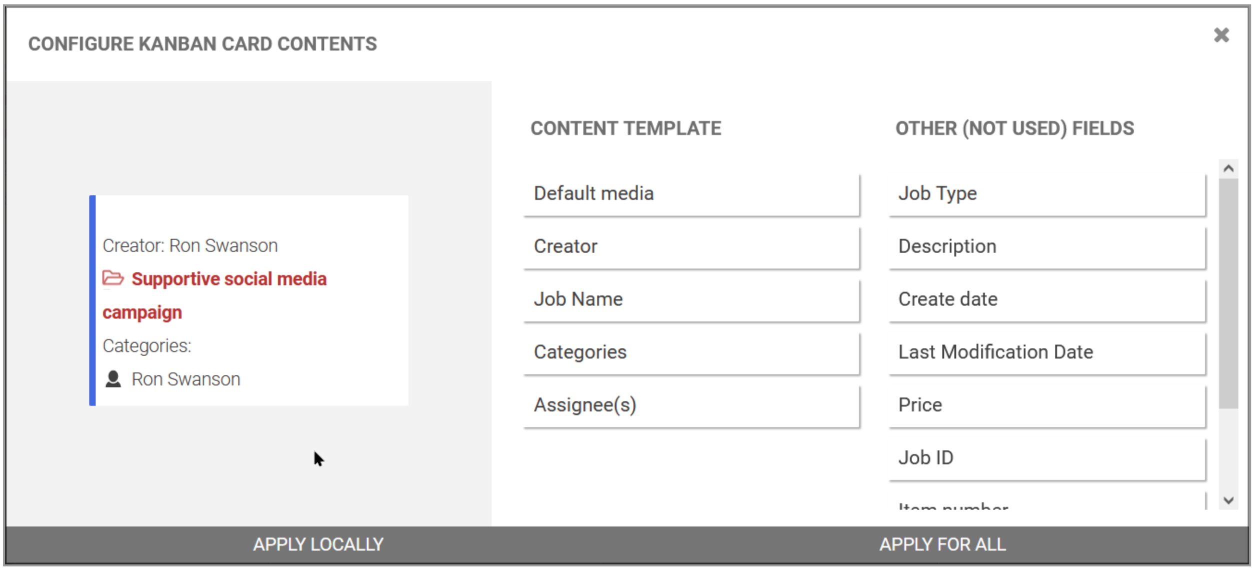
Click on *Add Column* to select the *System* columns *Sub-Jobs* and *Parent Job* from the menu. If you show these columns, you can better identify sub-jobs and their parent jobs.



See *Customizing the Table View* on page 28.

2.4.3 Customizing the Kanban View

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



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

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

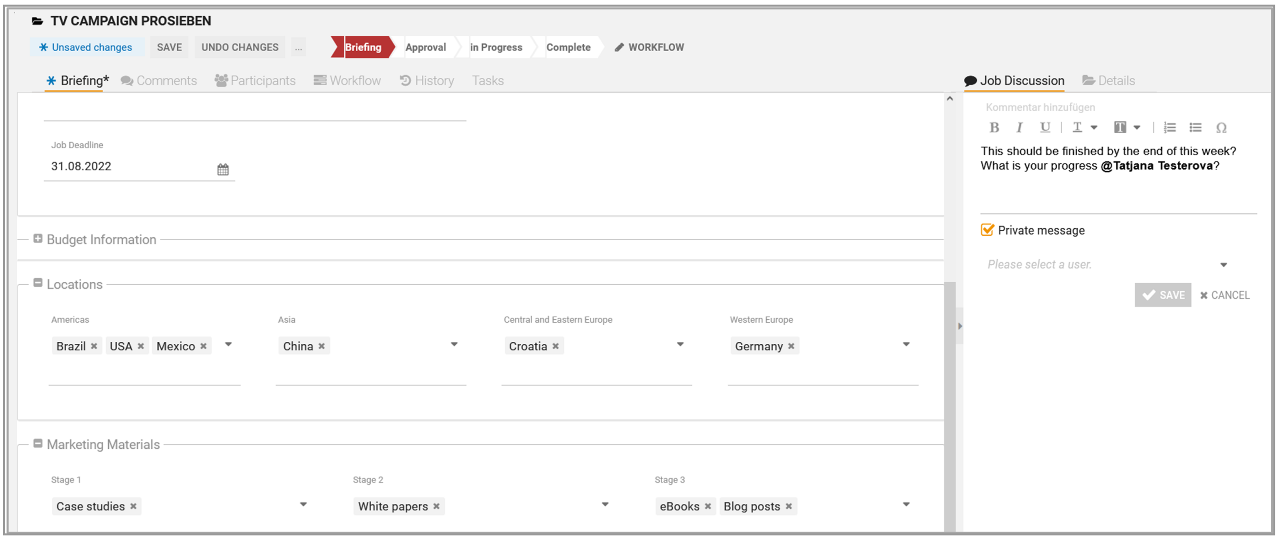
2.5 Data Sheet

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

The data sheet contains, among other things:

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

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



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

There are various functions in the upper area:

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

- *Forward job*: This forwards the job to the next workflow step. See *Forwarding a Job* on page 55.
- ... menu: You can access functions such as *Pass back*, *Clone*, *Link*, *Delete*, *Cancel*, *Change assignee*, and *Link Planning Element*.
- Displays the current Workflow-Status

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

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

The basic data of the job is displayed on the *Details* tab. If there is a variable is available on the data sheet for asset selection and you click on it, the tab displays detailed information about the asset and – if a review was created for the asset – the details of the review. You can also find detailed review details in this tab, such as review started, approved, rejected, new version requested or new version uploaded.

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

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

Associated Tasks

- *Overview of Data Sheet Variables* on page 87
- *Managing Participants* on page 42
- *Viewing workflows* on page 46
- *Asset Selector* on page 95
- *Sub-Jobs or Processes* on page 48
- *Sending Messages to Participants* on page 111
- *Interacting With Colleagues* on page 106
- *Forwarding a Job* on page 55
- *Copying a Job* on page 41

Creating Jobs 3

Ron is planning a new marketing campaign. To create it in the *Jobs* module, he needs to create a job (see *Adding a Job* on the facing page). Sometimes a similar campaign already exists, so he can copy the existing job and adjust the data as needed. This means that Ron does not need to re-enter some of the data, which saves time. See *Copying a Job* on page 41.

To plan and execute the job, Ron needs the help of colleagues with different functions. For this reason, he will invite them to the job, e.g. as participants, see *Managing Participants* on page 42.

Ron cannot manage the campaign alone and wants to discuss the job with his team colleagues as it progresses. He can add them to the job by sending them an invitation from the job data sheet. In the process, he can classify them as participants who can see and comment on the job. Ron can set an estimated duration for each step. He can also preassign an assignee or group that is responsible for executing a step. Ron saves the job to start it.

3.1 Adding a Job

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

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

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

   The *Add Job* dialog box opens.

2. Enter the name of the job in the *Title* field.
3. In the *Job Type* field, select the type that suits your purposes.
4. Click on *Add*.

   The data sheet opens.

5. Optional: Enter all relevant information about the campaign in the job, e.g.:
   - A briefing text to pass on the required briefing information.
   - An asset, e.g. to provide images as a pre-selection.
   - Add additional required tasks to a workflow step. If available in the data sheet, see Task Manager.

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

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

6. Once you have entered all the information, click on *Save*.
7. Your details are saved.
8. If you have made a mistake, you can press the *Undo changes* button to restore the original state.
9. Optional: Press *Forward job* in the upper left-hand corner of the data sheet to forward the job to

the next workflow step.

10. Click on ×.

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

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

Next Steps

You may want to add participants (see *Managing Participants* on page 42). Other steps and options include:

- *Forwarding a Job* on page 55

3.2 Copying a Job

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

Prerequisites: For users without the necessary permissions, the menu item is hidden.

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

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

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

5. Click on *Clone*.

The job is copied.

> **Note**
>
> For field functions with *single select*, the copy does not contain the entire drop-down list, only the selected entry.

3.3 Managing Participants

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

Who Is Allowed to Manage Participants?

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

How Does a User Become a Participant in a Job?

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

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

When a user group or organizational unit is selected, all of the users in the user group or organizational unit are added. Through a direct *@-Mention* on page 112 of other users in a discussion with @ in front of their name, they can be added to a job and to the discussion as participants without going through the *Participants* tab. For more information, see the chapter *Interacting With Colleagues* on page 106.

What Is a Participant Allowed to Do?

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

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

- Participants can use the standard filter *Jobs I Participate In* to see all jobs they are participating in and follow the progress of the job.

- Invited participants receive an e-mail with a deep link to the job. Double-clicking on the name opens the job.

> Note
>
> Former workflow task assignees now automatically retain visibility and access to their previously managed jobs through a seamless update to participant status, with no additional action required. This ensures you can easily track and reference your past workflow assignments while maintaining appropriate security controls across all process types. You'll no longer receive error messages when you try to reopen past assignments, because the system automatically preserves your access rights while limiting editing capabilities to current assignees only.

Related Actions

- Adding participants
- Removing participants

3.3.1 Removing Participants

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

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

The participant will be removed without a confirmation prompt.

3.3.2 Adding Participants

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

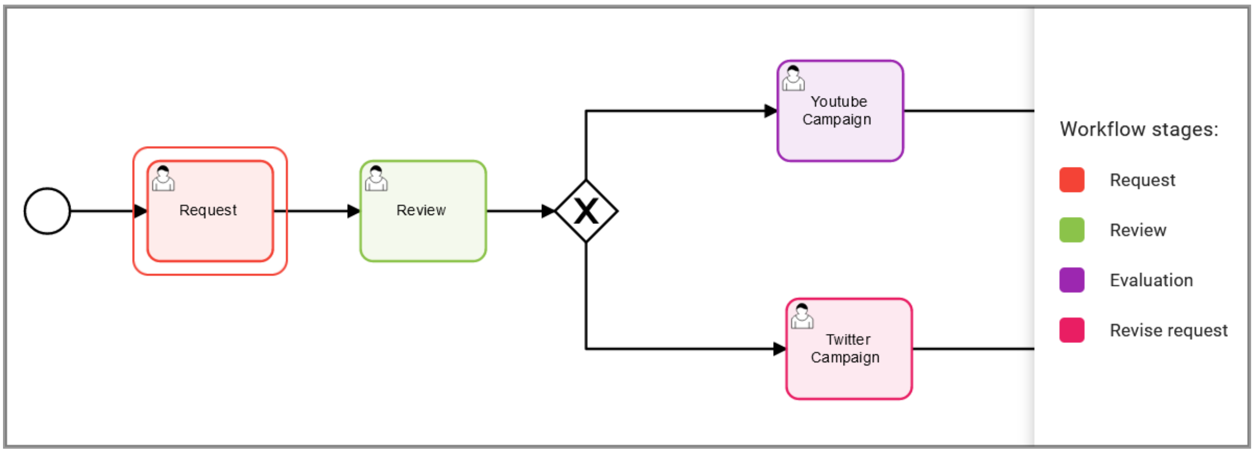
1. Open the job data sheet.
2. Switch to the *Participants* tab.
3. Use the search field to search for a user. To do this, enter the first three letters of the name.
4. Select the desired user from the list of suggestions.

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

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

3.4 Workflows

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



When you create a new job in your system, you need to plan the individual workflow steps required to execute that job.

Workflow Scheduling

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

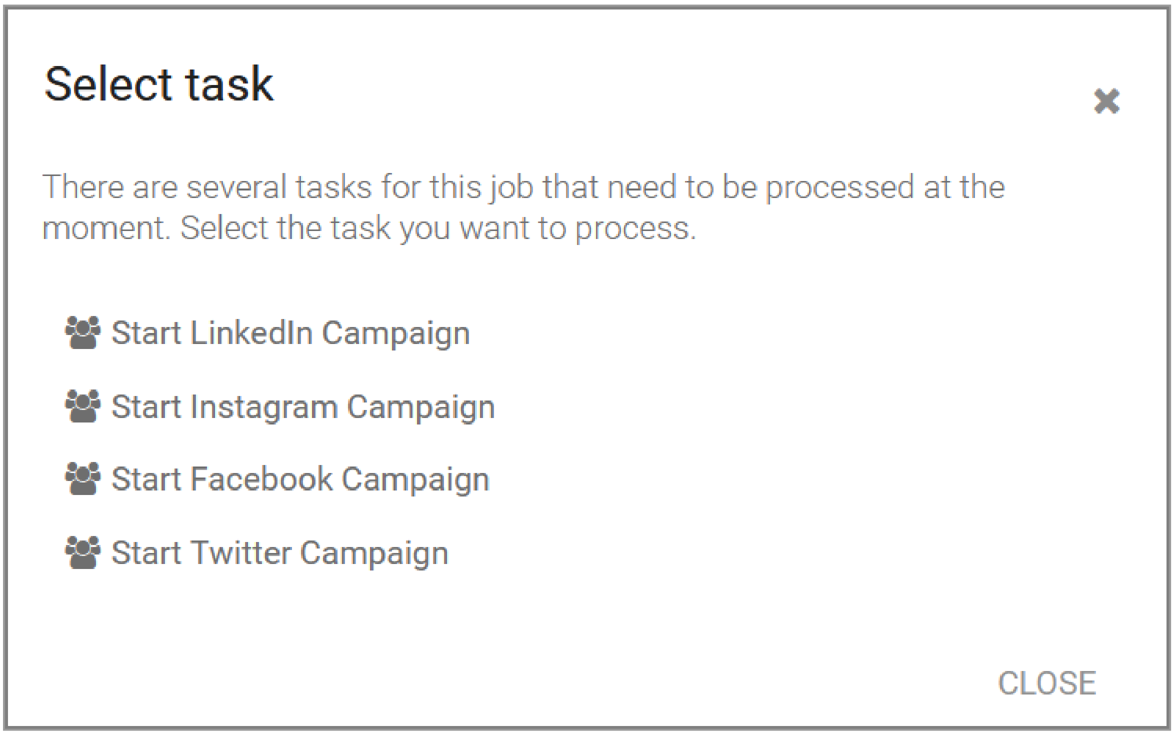
> Note
>
> After you create a job, it opens automatically in the initial workflow step. You cannot plan this step. The initial step starts when you create the job and ends when you forward the job to the first work step. Therefore, you can set the start and end date for subsequent steps only.

Special Features

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

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

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



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

3.4.1 Viewing workflows

The *Workflow* tab of the data sheet gives you an overview of the workflow steps into which the job is divided. The overview shows the individual workflows steps of jobs and completion status.

Note

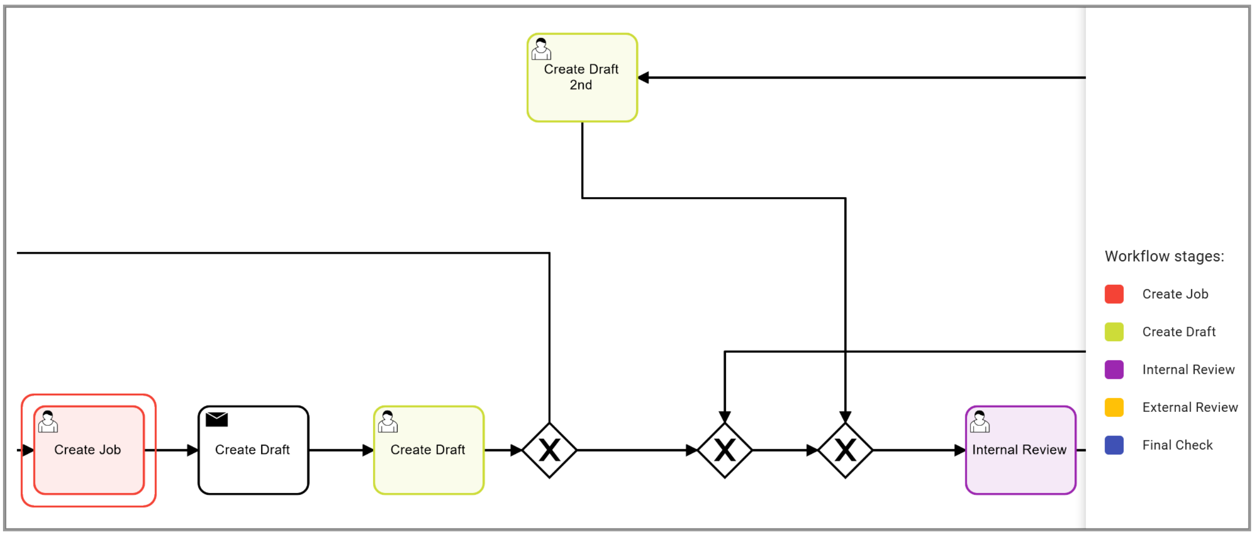
Due to the system architecture of BPMN workflows, you cannot change or define the assignee or adapt the creator in the data sheet on the *Workflow* tab.

The administrator must take this into account when creating the process types.

Viewing a Workflow

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

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



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

3.5 Sub-Jobs or Processes

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

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

A sub-job is linked directly on the data sheet of the parent job.

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

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

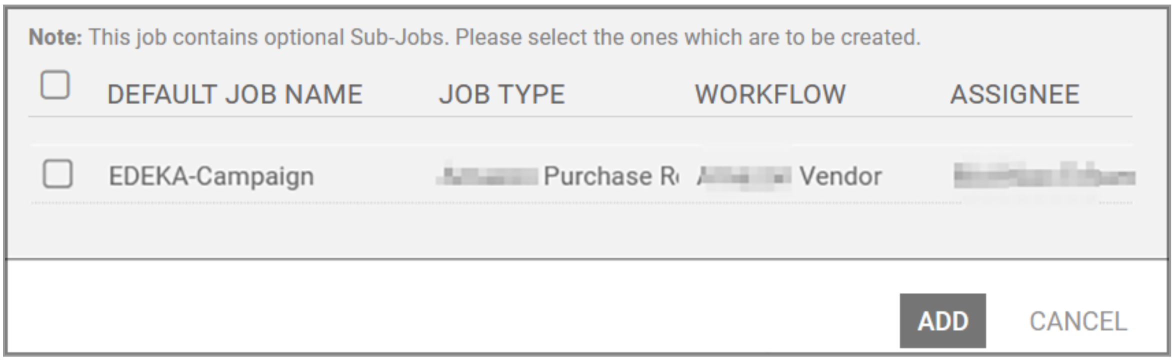
Properties of a Sub-Job

- A sub-job can use a different workflow from the parent job.
- A sub-job uses its own separate data sheet.
- The information and variables required for a sub-job are stored on the data sheet of that sub-job.
- A sub-job can inherit and adopt values from the parent job.
- The icon of a sub-job in the overview is 🗁. The icon of a job, on the other hand, is 📂.
- A sub-job appears in the job overview and in the dashboard. Except for the easily overlooked icon, it is not externally identified as a sub-job. You can customize the column view for better identification (see *Adjusting the View* on page 31).
- You can open the data sheet of the sub-job like other jobs either directly in the job overview or in the open data sheet of the parent job in the *Sub Jobs* tab.

Creating Sub-Jobs

There are several options for creating sub-jobs:

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



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

Detect Inherited Content and Adjust Inheritance

In sub-jobs, you can pre-fill variables and their contents by inheriting their values from the parent job. This is defined by the administrator when a job type is created.

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

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

Navigate Between Parent Jobs and Sub-Jobs

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

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

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

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

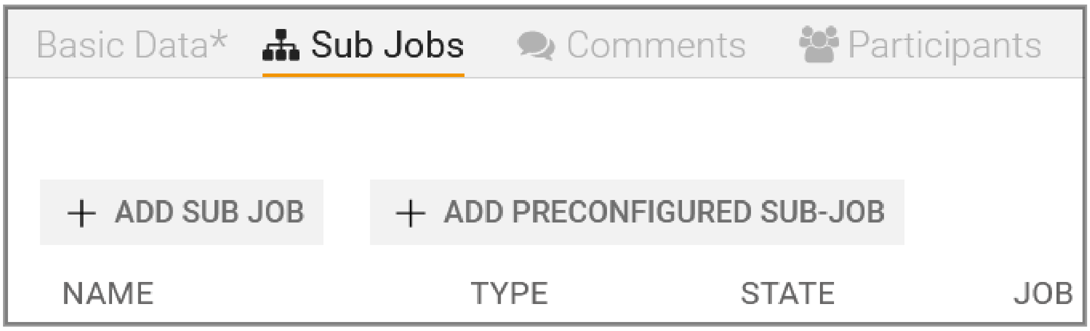
Associated Tasks

- *Creating a Sub-Job* below
- *Managing Sub-Jobs* on the facing page

3.5.1 Creating a Sub-Job

1. Open the data sheet of the desired parent job.
2. Switch to the *Sub Jobs* tab.

3. Click on the *ADD SUB JOB* button to select yourself from a list of given sub-job types.



You have created a sub-job. You now continue in the same way as you created the job. See *Adding a Job* on page 39.

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

3.5.2 Managing Sub-Jobs

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

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

Deleting a Sub-Job

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

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

3.6 Interaction With Activities

Ron wants to proceed from the planning stage to the execution stage. He links an activity to a prepared job in order to connect the strategic planning of a marketing activity with its operational planning. The activity timeline shows him when and how much budget he needs for a particular campaign. The job data sheet reflects how to create and execute the campaign.

Activity planning is tied bi-directionally to work execution. For example, status updates in the job data sheet are sent back to the activity, and the activity sends updates to variables of the job. This can help you monitor and track the actual progress of the work and compare it to what was originally planned.

Prerequisites: Your organization has created suitable templates for jobs and activities. If you have any questions, please contact your system administrator.

View in the Data Sheet

On the *Activities* page, a workflow has been created automatically or manually. This workflow can then be opened and edited in the *Jobs* module. When you open a job data sheet, without knowing if it is connected: the *Go to Activity* button appears on every data sheet which already has been connec-ted to an activity.

Data Exchange Between Job and Activity

When you link a job to an activity, the job and the activity can exchange data. Data can be managed both in the activity and in the job and then copied to the other object. When you open the job from *Activities* it will be populated with the latest values entered in the activity. When you are back in the activity, data exchange between the job and the activity only occurs when you manually synchronize the data.

The data is copied from the object where it is managed to the other object. This means that any data synced from the activity is read-only and cannot be modified. All data you can edit in the data sheet is later synced in the activity fields.

Related Task

- Synchronize Data

3.6.1 Open Activity From Job

1. Open a job that is linked to an activity.
2. Click *Save* after you have made edits on the data sheet.

   The job is updated.
3. Click *Go to activity*. Note: Before you click *Go to activity*, do not forget to click *Save* to commit changes.

   You will leave the data sheet and the *Details* panel of linked activity is opened.
4. In order to sync the changes, click the ... button at the bottom left of the panel and select the menu item *Sync Activity*.

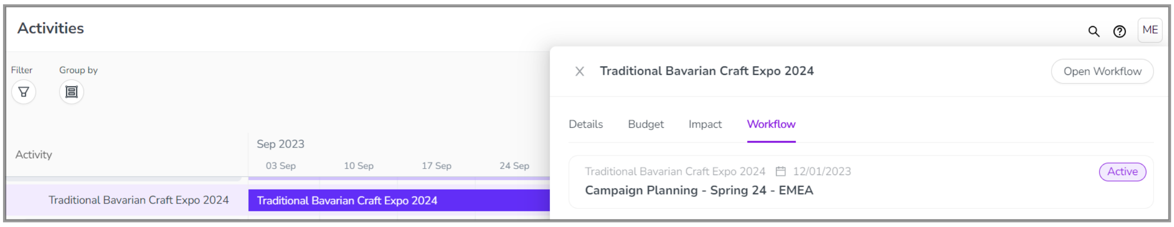
   The corresponding fields are populated with the most recent edits from the data sheet.

You have opened the activity from inside the data sheet.

3.6.2 How Do I Return to the Job From Activities?

1. Locate the activity you want to open the workflow for.
2. Click on the activity bar for that activity.
3. Optionally, in the summary view you can click on the row for that activity to open the details pane for more information.

   You will see an *Open Workflow* button at the top right of the activity.

4. Click *Open Workflow*.

   This action will switch your view to the *Jobs* module where the data sheet of the job configured for the activity opens.

   The data sheet displays the details of the job and reflects any recent changes to the linked activity.
5. Optional: Enter new data or edit exisiting fields.

Note: Some fields are read-only, as they are pulling data from the linked activity. You cannot edit these fields directly in the data sheet. Fields that were edited in the data sheet are synchronized with the activity.

You have successfully opened the corresponding workflow that has been configured for the activity.

3.7 Forwarding a Job

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

Who Do I Forward To?

Depending on the workflow configuration, a job is forwarded to either a user or a group.

- You can assign a job to a user. This user is then responsible for the next workflow step as the assignee.
- You can assign the job to a group. In this case, the job is displayed for all the members of the group in the *Available Jobs (PickList)*dashlet. Any member of the group can accept the job as an assignee or assign it to a different member. You can find more information under *Dashboard* on page 22.

How Do I Forward?

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

- *In the data sheet, click on the Completebutton located in the header. Regardless of which tab you are working on, this option is available everywhere while editing the data sheet. See* *Forwarding a Job/Process in the Data Sheet Via the Header on the next page*
- Using drag-and-drop in the Kanban view. If you prefer Kanban for displaying the workflow, see *Forwarding Jobs in Kanban View* on the next page

Next Steps

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

3.7.1 Forwarding a Job/Process in the Data Sheet Via the Header

Ron has just edited the data sheet fields for the current workflow step and the data sheet is still open. He now wants to transfer the job to another person or department. He sees the *Complete* button right after saving the changes in the header of the open data sheet and knows that he can use it to switch to the next workflow step. He clicks on the button to forward the job to the responsible colleagues.

Prerequisite: The *Complete* button is available after you save your entries by clicking on *Save*.

1. In the header, click on *Complete*.

   The *Complete workflow step* dialog box opens.

2. Optional: Enter a comment for the assignee.

   The assignee receives an e-mail and system notification. The comment is also displayed on the data sheet in the *Comments* tab in the main job discussion and in the sidebar.

3. Click on *Save*.

You have forwarded the job to the next workflow step. As a rule, another colleague or a group will take over the processing of this workflow step. The new assignee is notified by the system via e-mail. There is also a notification with the same content under the bell icon in the module navigation at the top right. You can view the content of your notifications by clicking on the bell icon in the upper right-hand corner of the module navigation.

3.7.2 Forwarding Jobs in Kanban View

Ron uses the Kanban view to track the progress of his jobs. Here, the jobs are arranged by workflow. This view allows him to graphically display the workflow steps in the form of tiles and shows him what status the jobs are in. For example, he can use this view to see all the jobs in the workflow step *Creation* arranged vertically.

> Note
>
> BPMN workflows are shown in the module's Kanban representation in read-only mode. This means that processes cannot be dragged and dropped into another workflow step. You can recognize them by the ⓘ following the job name in the header. Instead, open the data sheet in the Kanban view by double-clicking on the tile and follow the following description *Forwarding a Job/Process in the Data Sheet Via the Header* above.

4

Editing a Job

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

- Elena sorts by criteria such as name, status, due date, or priority. This helps her find the job faster. She also applies filters to list which jobs she currently has to complete. See *Searching Jobs and Filtering Results* on page 64.
- She opens the job by clicking on the job name or the *Edit* button. She thereby opens the data sheet, in which she can find all the important information about the job, such as the customer, requirements, attachments, or comments. See *Opening a Job* on page 81.
- Elena edits the content of the data sheet by clicking on the available tabs, fields, and buttons. She then enters the relevant data or edits existing entries. If necessary, images or documents can be attached to the job. See Editing a data sheet.
- Elena communicates with her colleagues by adding comments to the job or answering questions. She can ask questions or give feedback. She can see who else is involved in the job or who has already worked on it. See *Interacting With Colleagues* on page 106.
- When she completes the workflow step, Elena forwards the job. In so doing, she hands it over to another colleague or a supervisor. She returns it if she received it by mistake or if she is unable to process it. See Forward or return?.

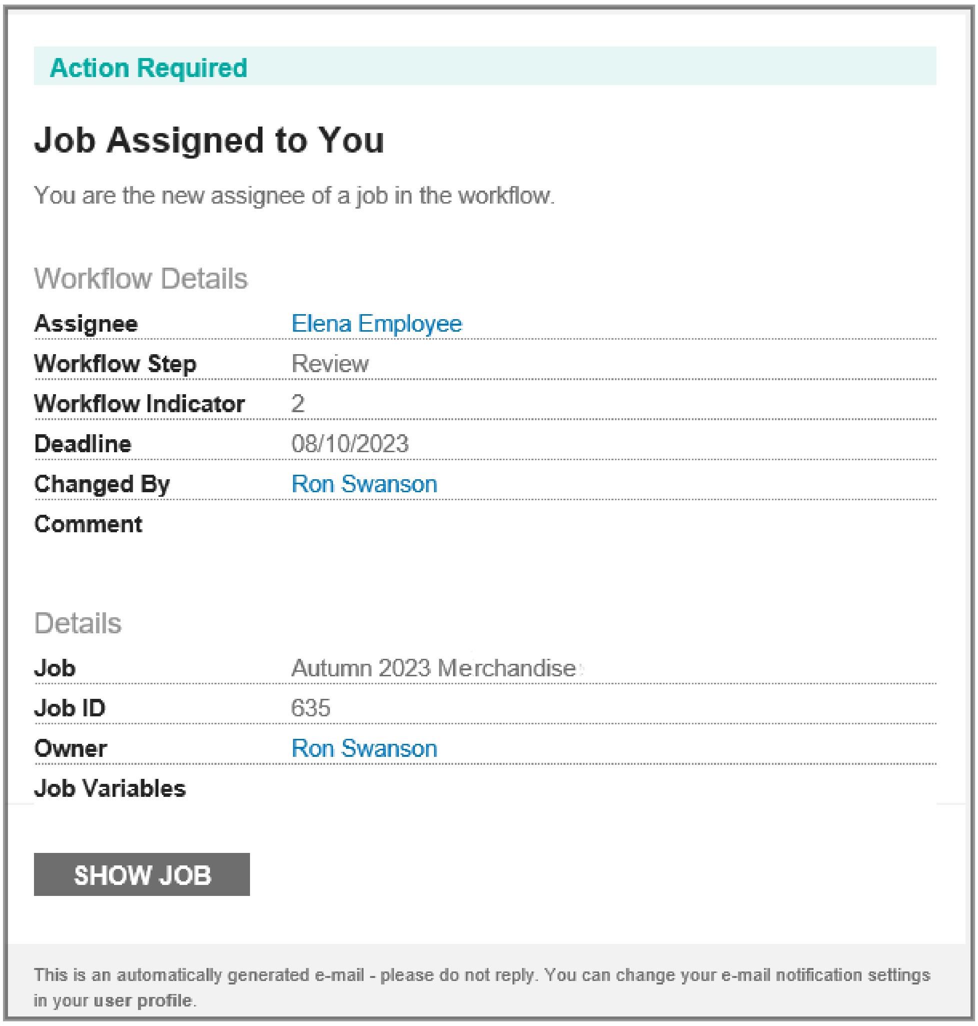
4.1 How Do I Know When a Job Has Been Assigned to Me?

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

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

How to Open a Job From an E-Mail

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


Action Required

Job Assigned to You

You are the new assignee of a job in the workflow.

Workflow Details

Assignee	Elena Employee
Workflow Step	Review
Workflow Indicator	2
Deadline	08/10/2023
Changed By	Ron Swanson
Comment	

Details

Job	Autumn 2023 Merchandise
Job ID	635
Owner	Ron Swanson
Job Variables	

SHOW JOB

This is an automatically generated e-mail - please do not reply. You can change your e-mail notification settings in your user profile.

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

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

E-Mail Deleted or Not Received?

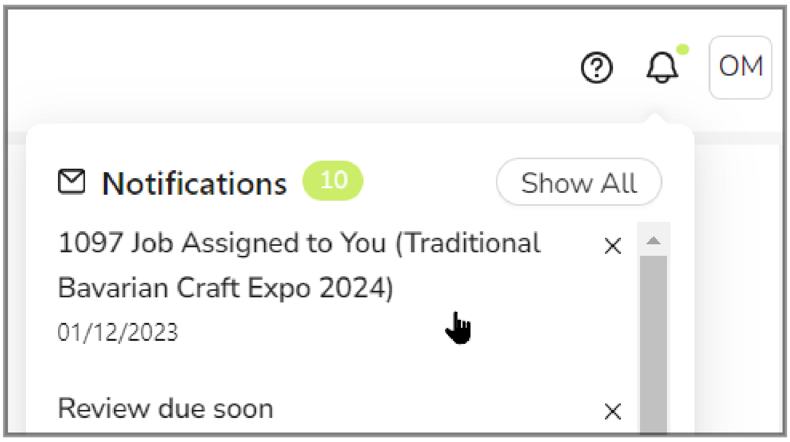
> Note
>
> The system usually informs you about important events by e-mail. It may be that your organization has completely disabled the e-mail service. In this case, no notification e-mails will be sent on behalf of the *Jobs* module either. However, if the e-mail notifications flood your inbox, you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

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

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

   The sidebar with notifications will appear.

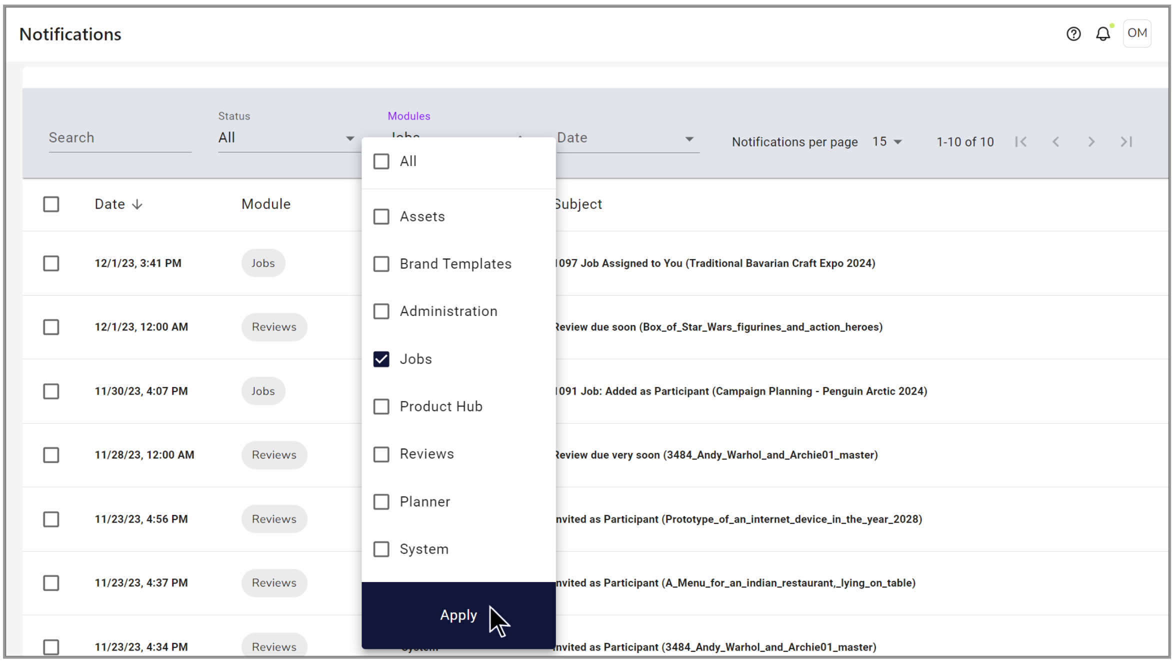
2. Click on the *Show All* button in the upper right-hand corner.

3. In the search and filter bar at the top click the column *Modules* and set the filter to *Jobs* in the

drop-down menu.

4. Click *Apply*.



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

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

Filtering in the Job Overview

To see the jobs assigned to you, you can use the filter menu in the job overview. In the filter menu at the top left, select the standard filter *My Active jobs (ToDos).* If you are a member of a group select *Picklist* from the *Standard Filter* menu. See Picklist.

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

Using the Dashboard

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

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

   The dashboard is loaded.

2. If the heading is collapsed, click on the downward-pointing triangle ▾ in the *My Active jobs (ToDos)* bar.

3. Click on an entry to open the job data sheet.

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

Searching for Jobs

You may need to do a little more work to find the job you need. The chapter *Searching Jobs and Filtering Results* on the next page explains the search functions of the *Jobs* module.

4.2 Searching Jobs and Filtering Results

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

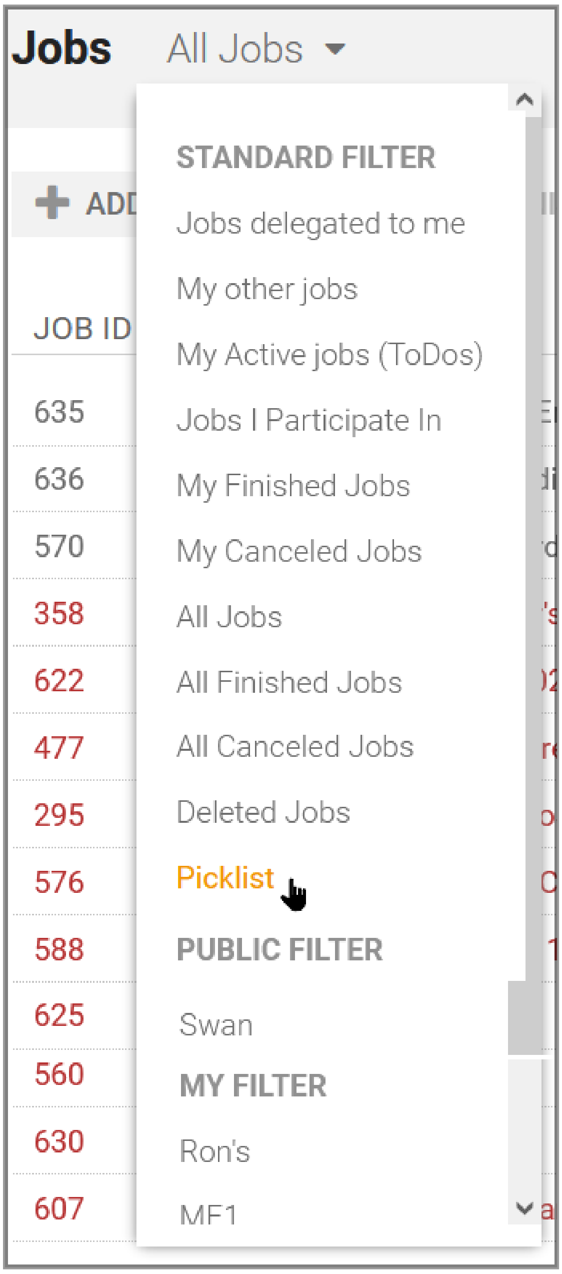
Using filters and the search functions, Ron can narrow down the listed jobs.

- Ron selects a filter to narrow down the overview based on predefined criteria or criteria he has saved after an advanced search. The filter menu allows him to display only jobs in a certain processing status or, if he has previously saved his own filter for this purpose, only jobs that belong to a specific customer. See *Filtering Jobs* on the facing page.
- Ron uses the simple search as a quick way to search for a specific term or combination of terms in the current filter view. See *Simple Search* on page 79.
- Ron uses the advanced search to define complex search requests based on a combination of multiple search criteria, which he can save and reuse as a filter. He can use the filter for himself only or make it available under *Public Filters*, thereby making it accessible to other users. See *Advanced Search* on page 76.
- To organize his work, Ron has assigned different categories to his jobs on the data sheet. *Filter by Category* allows him to filter in an existing filter view or based on the result of a search for jobs to which the selected category is assigned. See *Filtering by Category* on page 73.
- Ron needs a list of all jobs based on the type *Online Campaign*. To view only specific job types, he uses the menu *Filter by Type*. See *Filtering by Type* on page 72.

4.2.1 Filtering Jobs

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

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

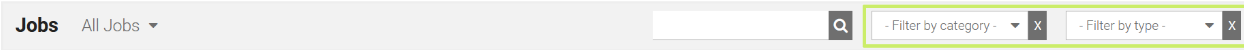


Three groups of filters are available in the menu for selection:

- *Standard Filter*: The search criteria of the Standard Filter, e.g. *Jobs I Participate In* or *My Finished Jobs*, are predefined automatically and cannot be edited. For more information, see *Standard Filter* on the facing page.

- *Public Filter*: This allows you to save an advanced search and publish it to everyone. This gives other users the possibility to use the same filter as you. For more information, see Public Filter on page 69.
- *My Filter*: This allows you to save your search results from an advanced search and store them as your own filter, so that you can access them quickly in the future and do not have to re-enter complex search queries. For more information, see My Filters on page 69.

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



- If the system variable *Categories* is present and maintained on the data sheet, you can filter for jobs with specific categories. For more information, see Filtering by Category on page 73
- To display only specific job types, the filter menu *Filter by type* is available on the far right. For more information, see Filtering by Type on page 72

4.2.1.1 Standard Filter

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

1. Open the overview with >*Jobs* > *Search.*
2. You can open the filter menu directly next to the title *Jobs* marked in bold by clicking on the triangular arrow ▼ after the current setting.

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

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

- *My Canceled Jobs*: This filter lists jobs that you have created and canceled.

  Note: Filters that start with *All* can only be seen by users whose role has the correct right in the Jobs.

- *All Jobs*: This allows you to find all jobs that are neither finished nor canceled. It also shows jobs that you are not involved in.
- *All Finished Jobs*: This filter lists all jobs in the database that have been finished.
- *All Canceled Jobs*: This filter lists all jobs in the database that have been canceled.
- *Deleted Jobs*: This filter lists all jobs in the database that have been deleted.
- *Picklist*: This filter lists all jobs that are assigned to you or to a group that you belong to. Simply select the job you would like to work on by clicking on the list entry, and the job will be assigned to you and removed from the *Picklist* filter.

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

4.2.1.2 Picklist

The *Picklist* eliminates the need to configure custom filters. It automatically displays all pickable jobs and user tasks. For those who used *Dashboard* to pick jobs, the *Picklist* filter provides a quicker way to see just the jobs assigned to your groups. This avoids any potential latency that may occur in the *Dashboard* when processing a high volume of jobs.

> Note
>
> If you do not yet see the entry in your *Standard Filter* dropdown menu, please contact your administrator.

1. Navigate to the main job overview screen >*Jobs*.
2. Click the filter menu on the top left.

   A dropdown menu opens.
3. Under the *Standard Filter* section, look for the *Picklist* filter option.
4. Select *Picklist* to filter the job overview to list only list jobs that can be picked by you.
   The job list will automatically refresh to only display jobs where the current workflow step is assigned to a group you are associated with.
5. Double-click the job you want to open and edit next.

You have picked a job from the *Picklist* filter.

4.2.1.3 Public Filter

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

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

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

4.2.1.4 My Filters

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

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

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

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

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

For the creation process, see *Advanced Search* on page 76 and *Saving and Publishing a Search As a Filter* below.

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

4.2.1.4.1 Saving and Publishing a Search As a Filter

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

Prerequisite: You have carried out the search request and the search hits are listed in the job overview. Please also note *Advanced Search* on page 76.

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

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

2. Click on *Search*.

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

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

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

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

5. Click on *Save as filter*.

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

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

4.2.1.4.2 Editing Saved Filters

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

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

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

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

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

4.2.1.4.3 Deleting a filter

1. Select the filter in the drop-down list to run the search.
2. Click on *Edit*.

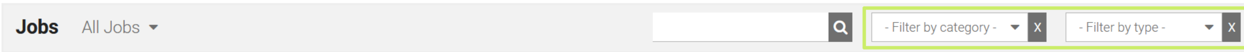
3. In the lower left-hand corner, click on *Clear*.

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

4.2.1.5 Filtering by Type

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

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



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

Note

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

EXAMPLE

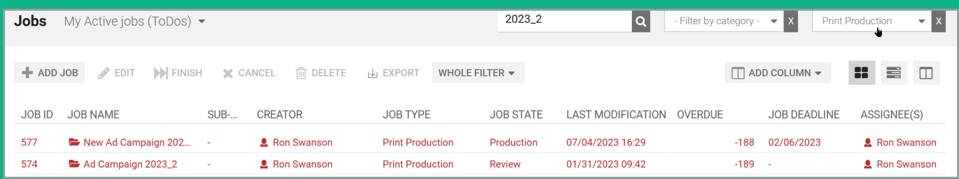
You want to edit a job for a print campaign and cannot find it immediately in the overview because there are a large number of new entries that differ only slightly in the job name. Since it is not an online campaign, you want to narrow down the search further using the filter menu *Filter by Type*.

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

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

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

2. Select *Print Production*.



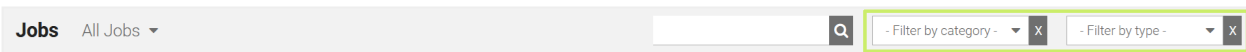
With this filter, the overview now only shows jobs based on this job type.

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

4.2.1.6 Filtering by Category

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

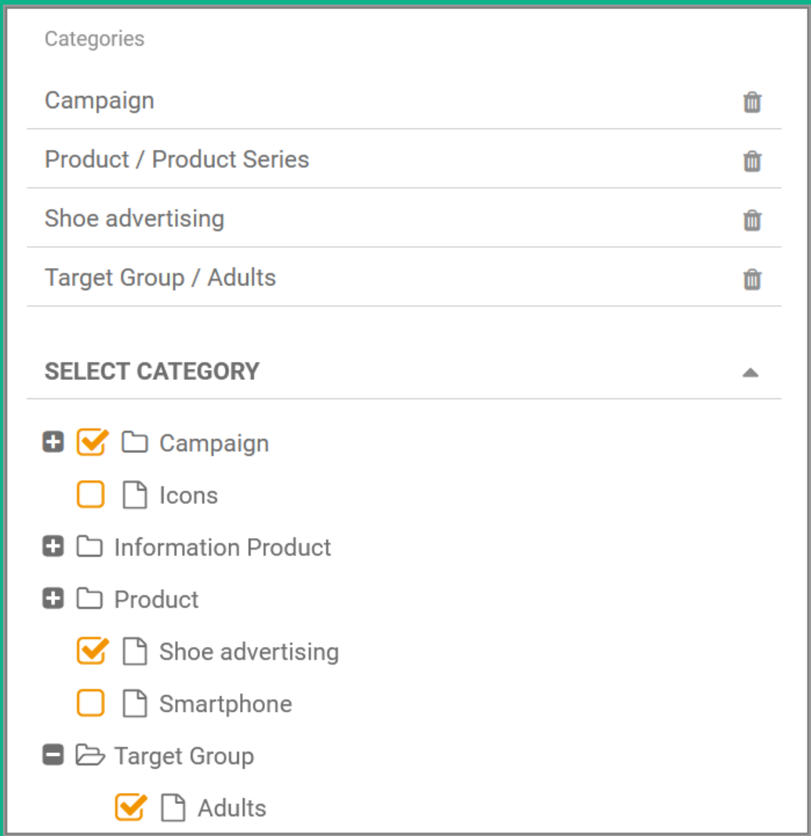
Before using categories to find jobs in an existing filter view, a number of precautions must be taken. To filter by category, the system variable *Categories* must be placed on the job data sheet and populated for at least one existing job. The categories are displayed as a drop-down list to the right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



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

EXAMPLE

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



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

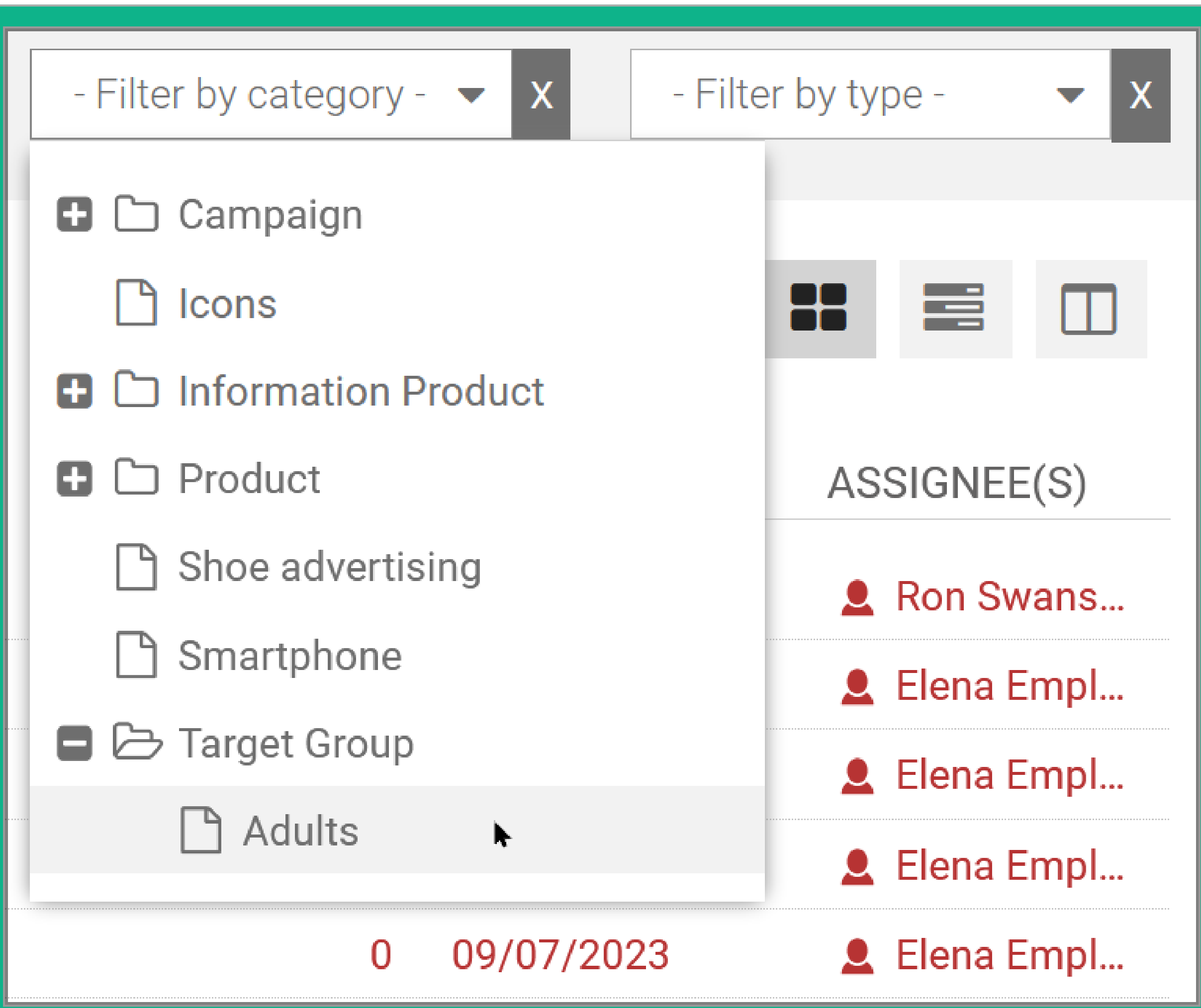
1. Click on the *Filter by Category* field.

   A drop-down list with all assigned categories opens.

2. Select the entry *Smartphone*.

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

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



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

4.2.2 Advanced Search

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

Criteria

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

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

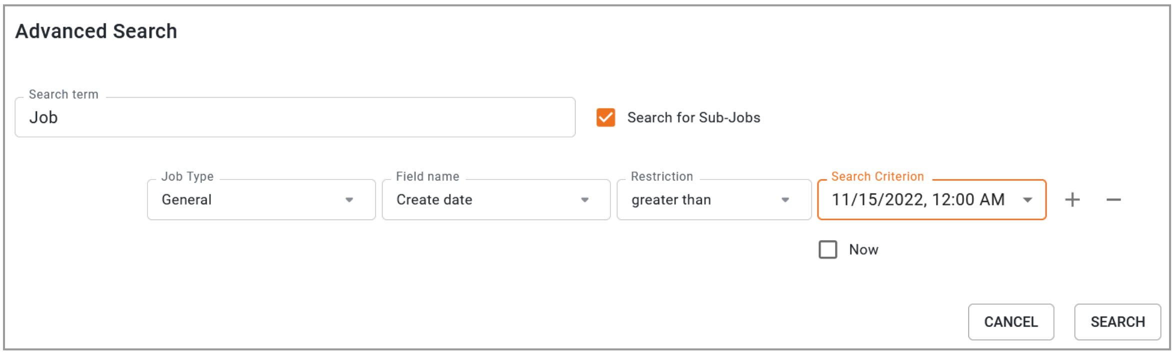
Executing an Advanced Search

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

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

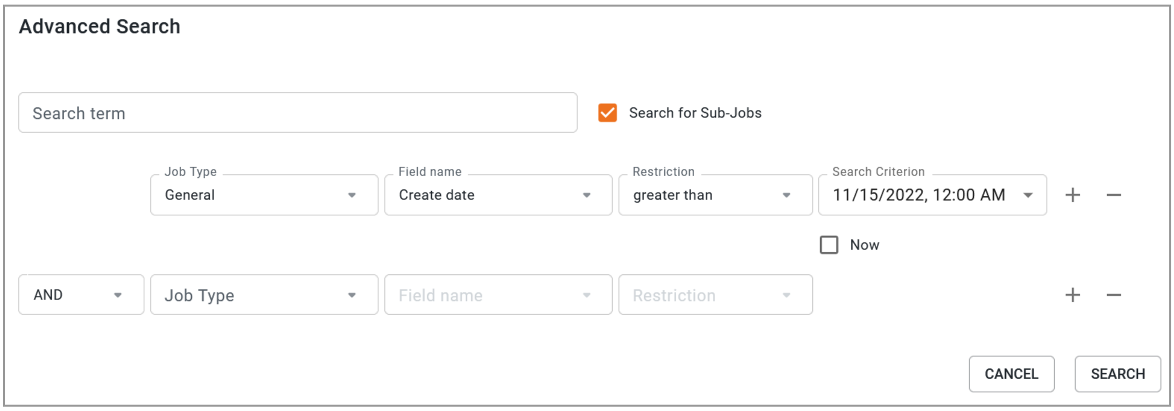
   The overview displays all the jobs that are currently being processed. The *Edit* button now appears next to the drop-down list.
3. Click on *Edit*.

   The editing dialog box *Advanced Search* opens.



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

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

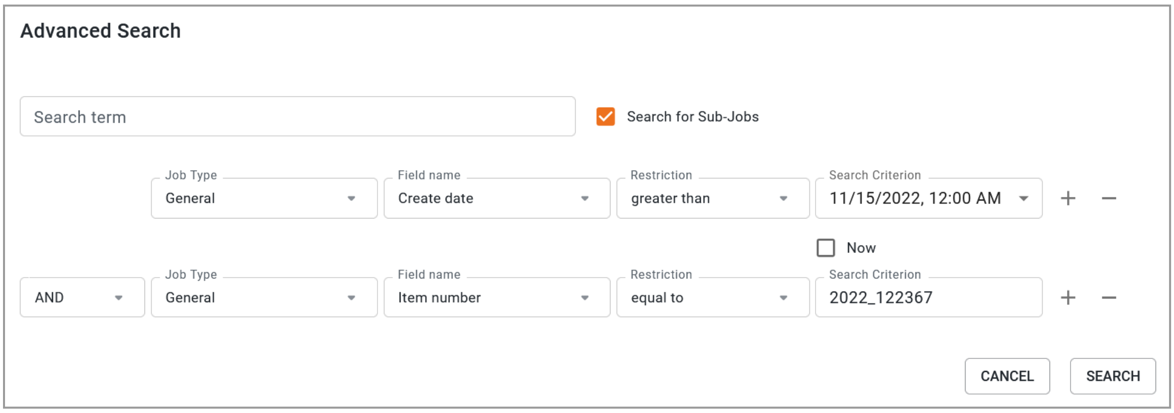


9. Select the entry *AND* from the drop-down list.
10. From the drop-down list *Job Type*, select the entry *General*.

    The *Search Criterion* field is displayed after the selection.

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

The dialog box is displayed as follows:



14. Click on *Search*.

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

15. Click on *Continue without saving*.

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

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

You have performed an advanced search combining two search criteria.

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

4.2.3 Simple Search

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

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

Your situation	**Input**	**Description**	**Examples: Search result**
You have one or more keywords, but you don't know if all keywords are included.	*Summer Campaign Review*	Multiple keywords are OR-linked in the search. You will get search results if at least one of the entered keywords is found.	• Summer Tradeshow • Winter Campaign • Review Summer Campaign • Review Adverts for Christmas • Campaign Review
You have an exact sequence of keywords.	*"Campaign Summer"*	In a search phrase, all the keywords entered must be found in the exact sequence specified.	• Campaign Summer • Campaign Summer 2023 • Shoes Campaign Summer

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

4.3 Opening a Job

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

Via an E-Mail Link

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

In the Dashboard

You can also use the dashboard as a starting point for your activities in the *Jobs* module. In the dashboard, at a prominent location at the top of the *My Active jobs (ToDos)* heading, you will find a list of all the jobs that are currently assigned to you. Click on the job you want to process next and you will be taken to the job page with the data sheet. See *Dashboard* on page 22.

In the Job Overview

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

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

Context Menu in Job Overview

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

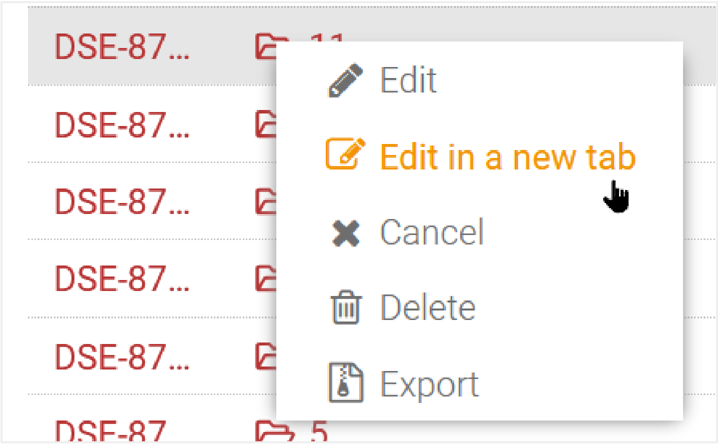
- *Edit*
- *Edit in a new tab*

- *Cancel*
- *Delete*
- *Export*

Edit in a New Tab

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

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



This allows you to:

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

Opening a Sub-Job in the Data Sheet

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

Associated Tasks

- Editing a data sheet
- *Sub-Jobs or Processes* on page 48

4.4 Understanding the New Sub-String Search Feature

When you open your job data sheet, you'll notice an improved search behavior in select variables. Here's how to use it:

To perform a sub-string search:

1. Navigate to any single- or multi-select variable in your job data sheet.
2. Click the search field.
3. Type any part of the option you're looking for – it doesn't have to be the beginning of a string.
4. For example, imagine searching for monitor-related products:
5. Type *monitor* and you'll now see a list of all options containing that word:

This is different from before, when typing *monitor* would only show options that began with that word.

The improved search works seamlessly across different contexts:

- Basic single-select fields
- Multi-select dropdowns
- Advanced grids with select variables

PRACTICAL EXAMPLE

If you're looking for all options related to *pro*, simply type those letters. The search will return matches like:

- Studio Monitor Professional
- SmartPro Gaming Mouse
- ProCam 4K
- GoPro Mount Kit
- MyProtect Screen Shield

This streamlined approach means that any matching text within the name will be found. The same principle applies whether you're searching for technical specs, product variants, or inventory categories. The search works with your existing naming conventions, rather than forcing you to remember exact prefixes.

4.5 Visibility of Tabs and Variables

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

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

4.6 Overview of Data Sheet Variables

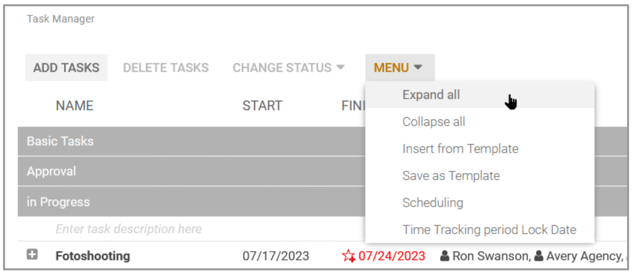
To ensure that all of the necessary information (for campaign planning, for example) can be entered, Ron and his team have numerous variables (field functions) available for the data sheet layout. The following is a tabular list of variables used that are specific to the *Jobs* module and that you will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

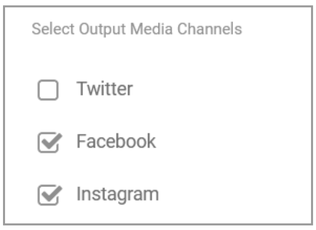
Variable Types

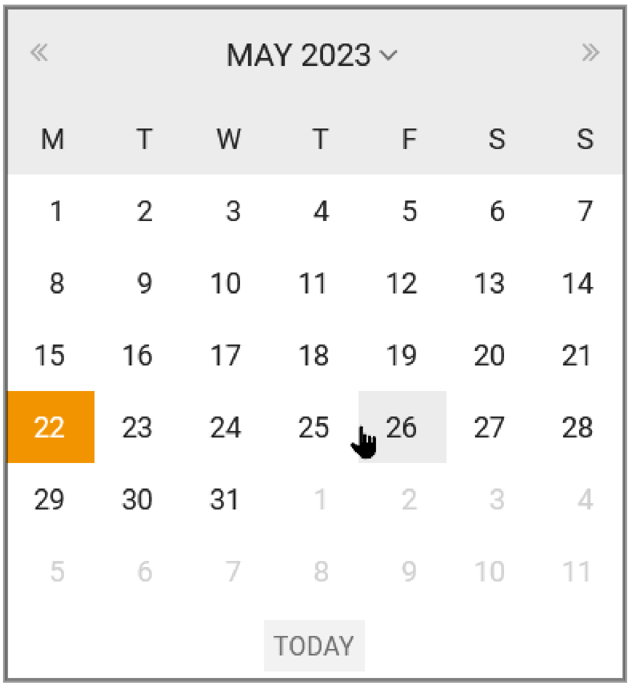
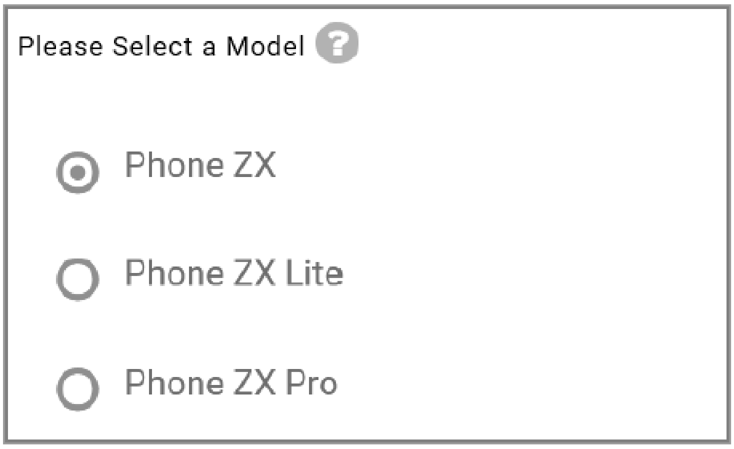
The following table shows an overview of the variable types used that you may encounter on a data sheet. To provide a better overview, they are sorted alphabetically and explained here briefly.

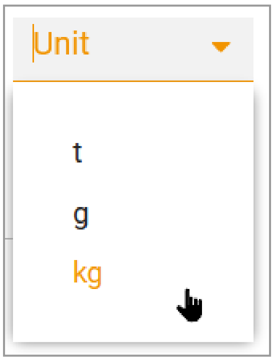
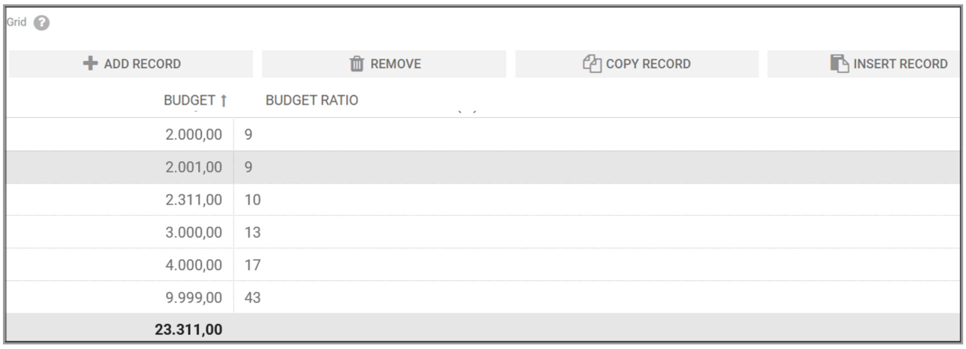
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Action</td><td>This variable represents a button on the data sheet. Clicking on it opens the stored URL.</td></tr>
<tr><td>Asset Selector</td><td>You can use this to add assets from the Media Pool or locally saved image files (see *Asset Selector* on page 95).


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

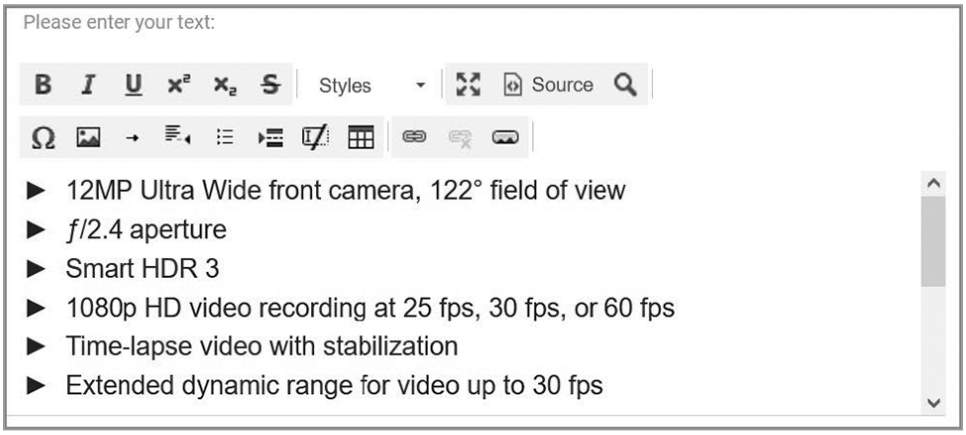

</td></tr>
<tr><td>Selection field (single or multi-select)</td><td>Here you will find a selection of predefined entries. Both drop-down lists and radio buttons are possible. Selection fields can be linked to custom objects so that, for example, cent-rally defined boilerplate texts can be selected.


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

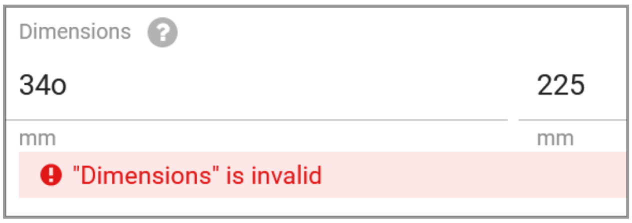
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>User</td><td>This function is responsible for searching and selecting users on the data sheet.</td></tr>
<tr><td>Date selection field and date picker</td><td>Here, you can enter a date in the format DD.MM.YYYYor select one using a date picker. Another option is to use a date picker with an additional time selection.

</td></tr>
<tr><td>Single-select</td><td>This allows you to select a single stored value.

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

Function	Description
Combo box	A combo box contains a list of elements from which you can choose. It consists of a text field at the top and a drop-down list. Users can either select a stored value from the drop-down list or enter their own value in the text field. 
Multi-select	This type of field allows you to make a selection from multiple stored values. 
Table	To enter and display required information in a tabular view, two different table types can be set up on the data sheet. For more information, see the section *Tables* on page 102. 

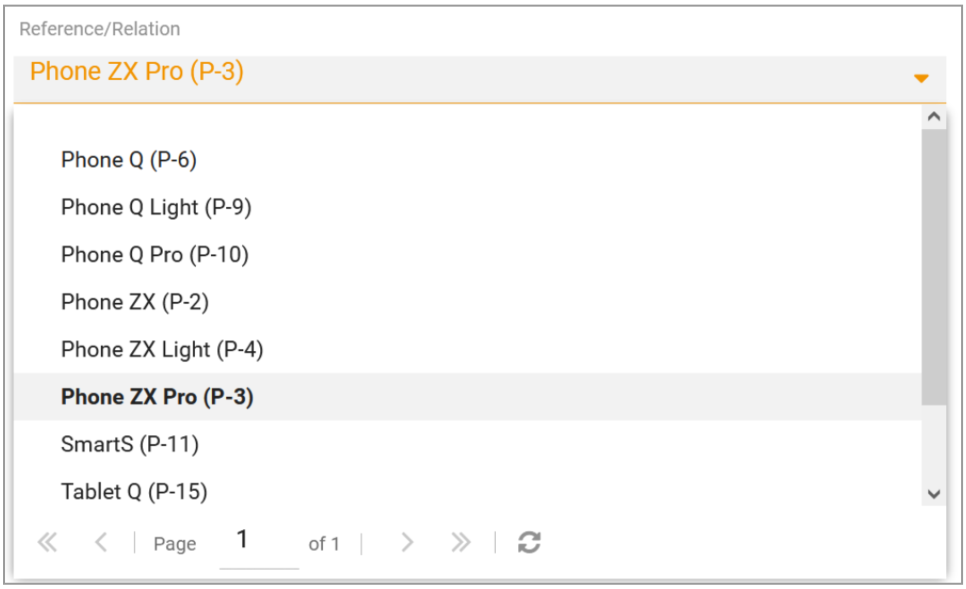
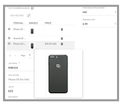
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Text fields (single or multi-line)</td><td>
These are fields in which you can enter a text that can consists of one or more lines. The maximum number of characters allowed may be limited.



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



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

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

</td></tr>
<tr><td>Reference/Property</td><td>In extended tables: This allows variables from another data sheet (such as Asset Selector) to be displayed in their own table column. In the figure, the reference to the image asset has been added to the product name.
</td></tr>
</table>

4.7 Adding Assets

Add one or more local files or existing system assets to the job data sheet.

Prerequisite: If the Image variable appears as the *Add Asset* button on the data sheet, you can use it to add local files, clipboard content, or Media Pool assets.

> Note
>
> It is not possible to use the same asset more than once in the Media section of the open job data sheet.

Choose one of these four ways to add assets:

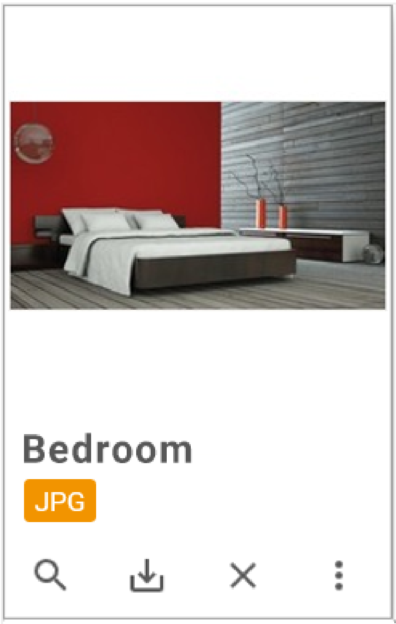
- *Uploading a File From the Computer* on page 95

  Use *Upload new assets* to attach files from your device or server.
- *Adding From Own Collection* on page 98

  Select assets you previously uploaded and saved in your *Own DSE images* collection in the Media Pool.
- *Selecting an Existing Asset* on page 97

  Search for an asset in the Media Pool and place it on the data sheet using the *Image* tab.
- **Quickly add images from your clipboard** — no need to upload manually: Paste an image like a screenshot directly from your clipboard into the *Asset Selector* with CTRL + V or CMD + V. Just copy with CTRL + C or CMD + C, click *Add Asset*, then click the upload dialog to paste the content from your clipboard. Click *Start* to upload.

Functions on the Added Asset



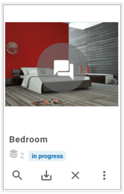
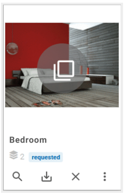
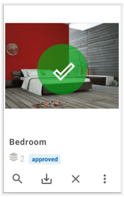
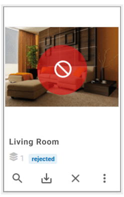
The asset appears as a tile on the data sheet, showing its original file name (without suffix), format, and a function bar. Use these buttons:

Function	Description
	Open detailed view with metadata and preview.
	Download the asset.
×	Remove the asset from the data sheet.
⋮	Open the ⋮ menu for more functions.
Open	Open the asset's detailed view.
Start Review	Note: Only available with the *Review Manager* and required permissions. Shows ongoing reviews on the tile and *Details* tab. The comments area shows who edited the review. Click the tile to check review status. See below for review progress indicators.
Open Review	Note: Visible only with an ongoing review and permissions.

Function	Description
Decide	Note: Requires permission to vote. Approve or reject the asset directly.
Large Preview	Show a large preview of the asset.
Remove	Remove the asset from the data sheet.
Send As Email	Send the asset by email.
Download	Download and save the asset locally.

Status Indicators of a Review in the Data Sheet

If a review is active, icons indicate its status.

Function	Description
	Review in progress (e.g., version 2).
	Review paused; new version requested.
	Review complete; asset approved.
	Review complete; asset rejected.

See the Review Manager User Help for details.

4.7.1 Asset Selector

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

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

CASE EXAMPLE

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

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

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

Associated Tasks

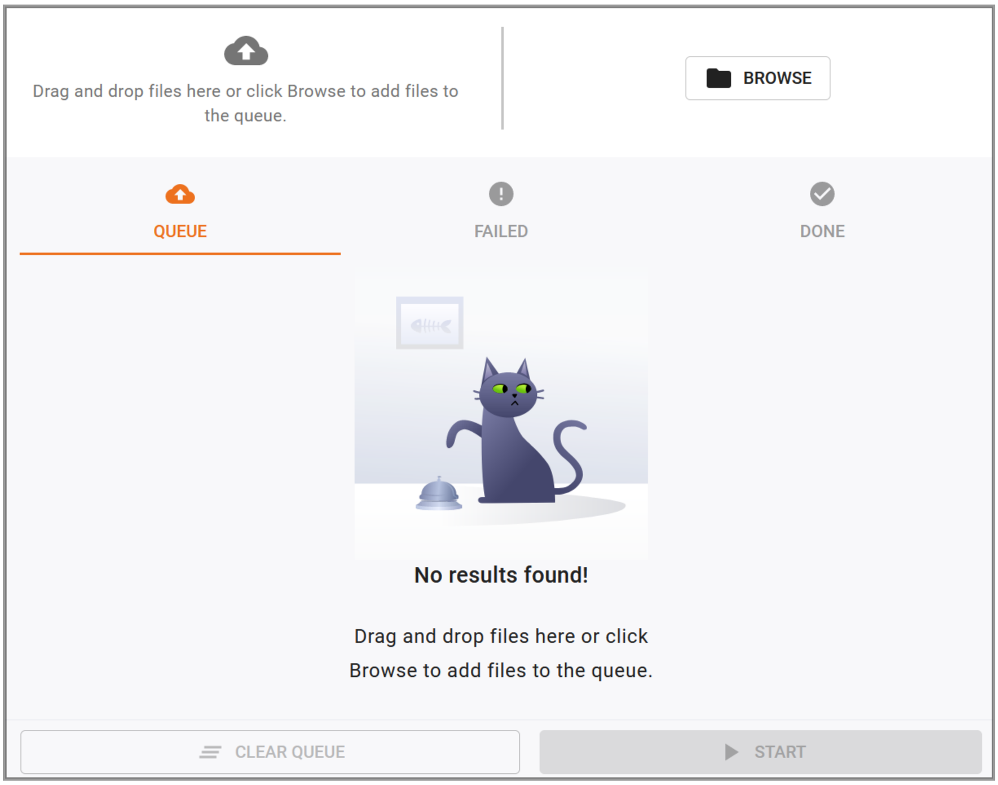
- *Adding Assets* on page 92
- *Downloading Assets* on page 100
- *How to Send Assets by E-Mail* on page 99

4.7.2 Uploading a File From the Computer

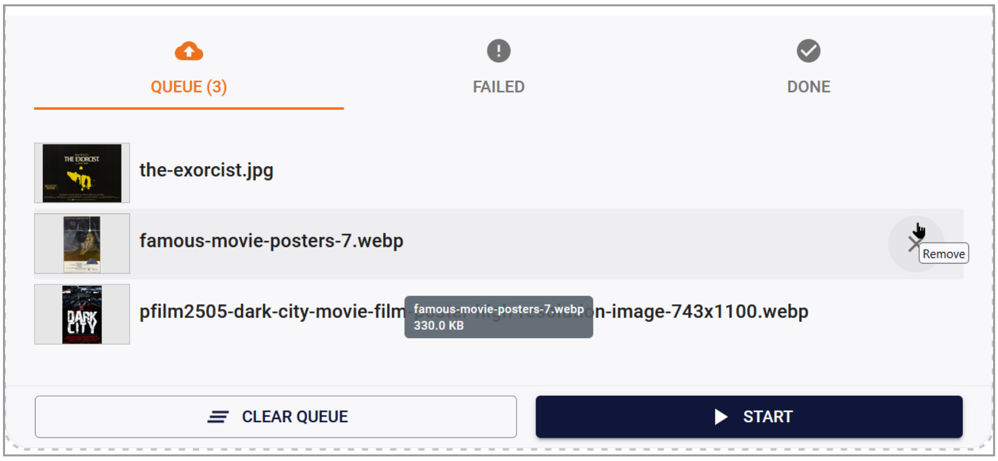
1. Open the job data sheet and switch to the tab with the Image.
2. Click on the *Add Asset* button on the data sheet or, to the side of that, select ▾ menu > *Upload new assets*.

   The file upload window opens.

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



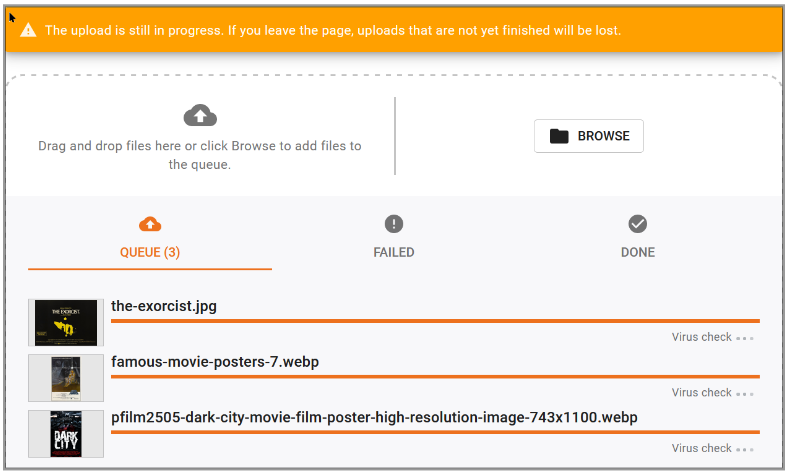
4. Optional: Paste an image like a screenshot directly from your clipboard into the *Asset Selector* with CTRL + V or CMD + V. Just copy with CTRL + C or CMD + C, click *Add Asset*, then click the upload dialog to paste the content from your clipboard. Click *Start* to upload.
5. Optional: To remove individual accidentally placed files from the queue, move the mouse pointer over the item and click on ✕ .



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

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

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



> **Note**
>
> The separate upload window must not be closed before the process is complete. While uploading large files or a large number of files, you can continue working in the system without interruption.
>
> If an upload fails, you will get more information in a tooltip by moving the mouse pointer over the corresponding file in the list. Often the file is already in the Media Pool as an identical duplicate, which is why the upload is aborted.

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

4.7.3 Selecting an Existing Asset

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

   This opens the asset search in the Media Pool.

3. Search for an existing asset in the Media Pool: Enter your search terms and press ⏎.
For information about searching in the Media Pool, please see the Media Pool User Help 8.0.
4. In the search results, activate the checkbox for the asset that you want to select in the bottom right corner of the asset tile by clicking on the circled plus sign.

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

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

   The search window closes and the selection made is placed on the data sheet. The assets appear as tiles on the data sheet.
6. In the upper area of the data sheet, click on *Save* to save your changes to the data sheet.

   The data sheet remains open for further processing.
7. In the upper area of the data sheet, click on the close field ×.

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

4.7.4 Adding From Own Collection

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

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

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

4.7.5 Deeplink Access to Jobs

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

New Features

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

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

Improvements

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

4.7.6 How to Send Assets by E-Mail

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

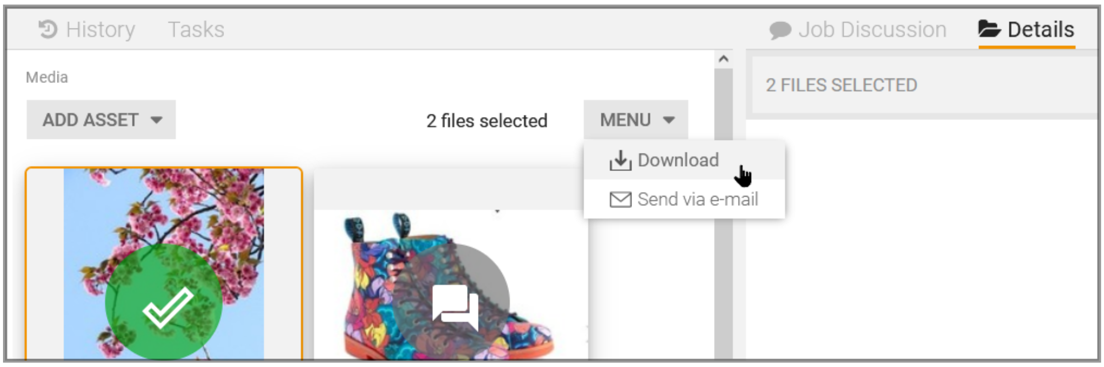
If there is more than one asset on the data sheet, you can make multiple selections by holding down the SHIFT key and clicking on the beginning and end of the desired selection. You can also hold down the CTRL or CMD key and select specific individual assets.

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

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

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

2. A *MENU* button appears above the asset heading.



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

   The *Send by e-mail* dialog box opens. If you want to send the PDFs, everything is preset and you do not need to change anything in the selection. Other options to choose from are *Presentation*, *Print*, *Web*, and *Original*.

4. Select an option or leave everything as default.
5. Enter the address(es) for one or more e-mail recipients in the search field or select the recipient(s) by scrolling down the drop-down list and using the arrows to scroll through the entries.
6. Adjust the text of the e-mail message.
7. Select a send option:
   - *As link*
   - *As attachment*
8. Click on the *Send via e-mail* button.

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

9. Click on *Close*.

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

Refer also to *Downloading Assets* below.

4.7.7 Downloading Assets

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

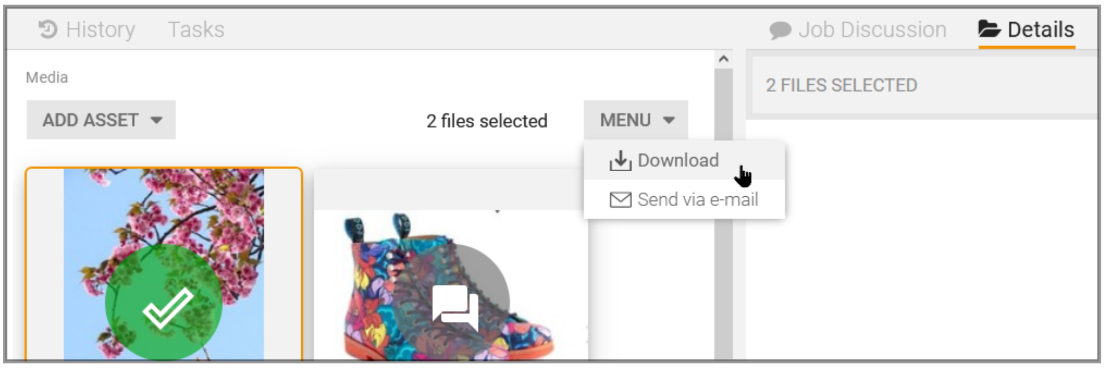
If there is more than one asset on the data sheet, you can make multiple selections by holding down the SHIFT key and clicking on the beginning and end of the desired selection. You can also hold down the CTRL or CMD key and select specific individual assets.

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

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

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

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

2. Select *MENU* > *Download*.

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

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

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

Refer also to *How to Send Assets by E-Mail* on page 99.

4.8 Tables

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

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

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

Advanced Grid

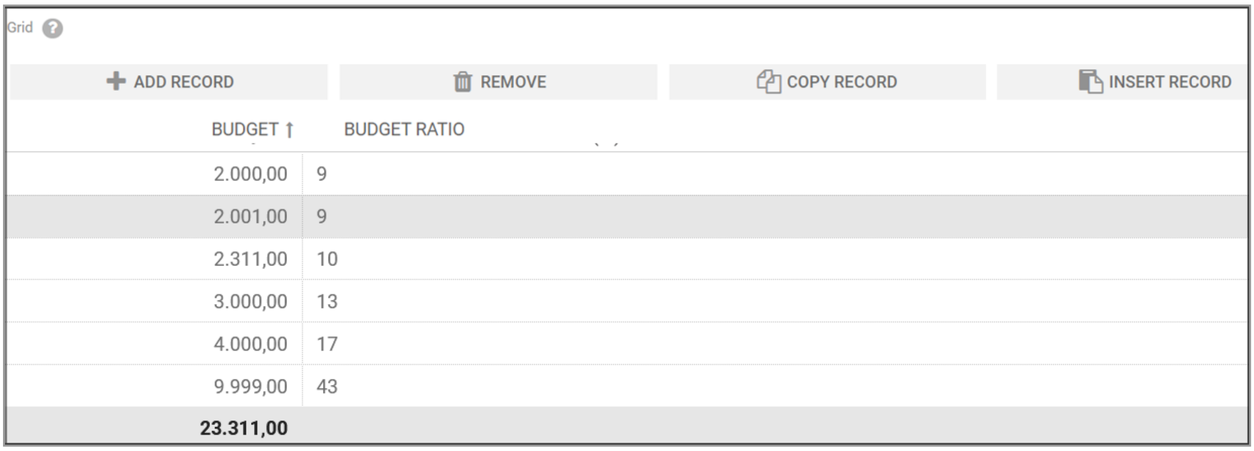
This type of table allows for a highly differentiated collection of data and data types. These include text, assets, dates, relations, and multi-select. You can also display extensive tables of this type with pagination.

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

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

Comfort Grid

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



Grid ?			
ADD RECORD	REMOVE	COPY RECORD	INSERT RECORD
BUDGET ↑	BUDGET RATIO		
2.000,00	9		
2.001,00	9		
2.311,00	10		
3.000,00	13		
4.000,00	17		
9.999,00	43		
23.311,00			

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

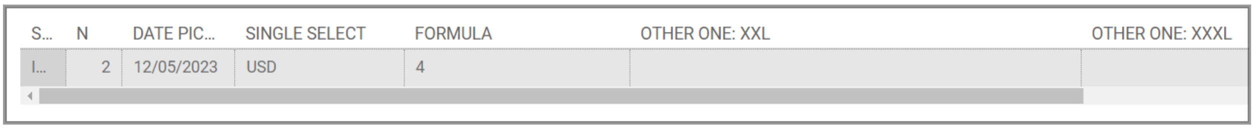
- Use the *Add Record* button above the table to add as many lines as you want. Selected lines can also be removed by clicking on the *Remove* button with the trash icon.
  Note: The lines are removed immediately with no confirmation dialog box.
- You can activate edit mode by double-clicking on a cell.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

A date can also be entered via the text field.

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

- Clicking on a column header will sort the contents of that column. Click again to sort in reverse order.

The comfort grid displays columns automatically based on the administrator's layout, ensuring a consistent and optimized viewing experience.

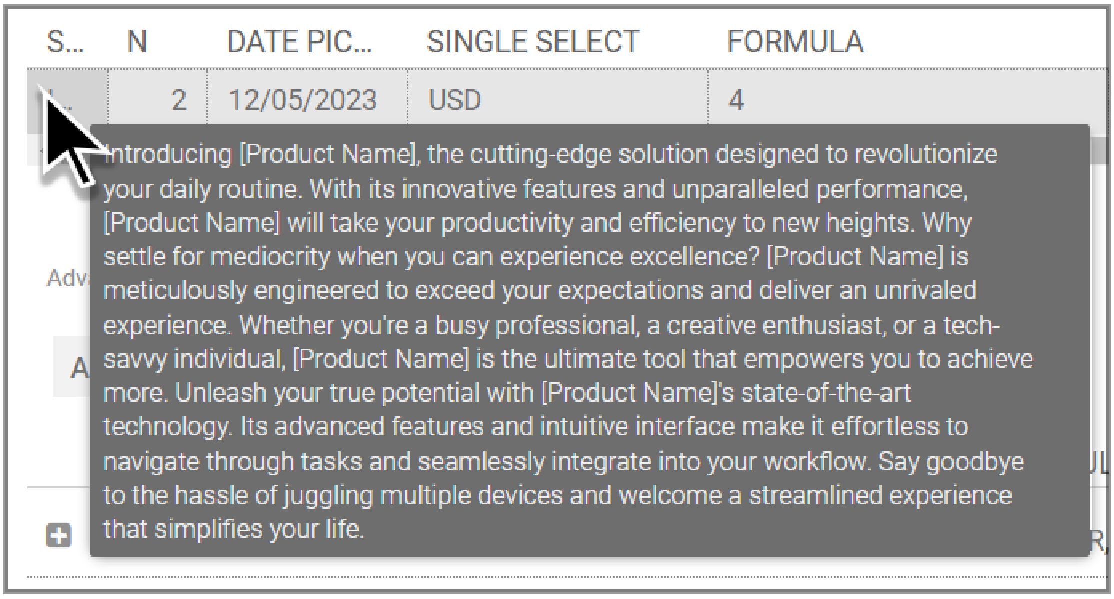


Note

If your administrator has not specified column widths in the data sheet layout, custom widths are not applied. In this case, the grid will use the default.

You can use the button to activate the view of the table in full-screen mode. In this mode, you will only see the table on the data sheet and will rarely have to scroll through the data.

If the content of a cell cannot be displayed completely, place the cursor above the cell. The content is then displayed in a tooltip. This also applies to cells in the header.



When the grid content exceeds the visible area or container width, a horizontal scrollbar will automatically appear at the bottom of the grid. This scrollbar allows you to easily scroll left and right to access any columns or content that extend beyond the viewable area.

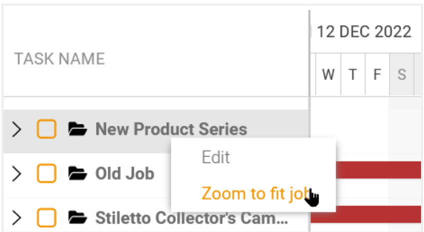
4.9 Editing Jobs in Gantt Mode

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

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

   You will now see the names of all workflow steps.

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

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

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

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

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

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

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

You have edited the job in Gantt mode.

4.10 Interacting With Colleagues

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

Note

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

Associated Tasks

- *Job Discussions Under the Comments Tab* below
- *Job Discussion in the Sidebar* on page 110
- *Sending Messages to Participants* on page 111
- *@-Mention* on page 112

4.10.1 Job Discussions Under the Comments Tab

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

Functions of the Job Discussion

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

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

Button/Function	Description
...	In the **...** menu at the top right of the discussion, you can access the following functions: *Print as PDF*: This creates a PDF file of the discussion. *Configure Discussion*: In the discussion configuration, you can change the name of and participants in the discussion. This only applies to new discussions you create. Note: Participants must have appropriate permissions in their user role to be invited to an asset review under *Comments*.
	Use the pencil icon to open the selected (own) comment for editing to make adjustments to the content.
... (on the asset)	You can use the following functions for the assets added to a comment: • *Open*: This opens the detailed view of the asset in a pop-up window. • *Open Review*: This allows you to load the asset to the Review Manager module and start a new review. • *Large Preview*: This opens a large preview image in a pop-up window. You can call the detailed view of the asset from the dialog box. • *Remove*: This removes the asset from the data sheet. • Send As Email: This opens a new dialog box where you can send the asset by e-mail. • *Download*: This opens a new dialog window where you can download the asset and save it locally. Note: The available functions depend on the permissions of your user role.

You can find more information at:

- *Job Discussion in the Sidebar* on page 110
- *@-Mention* on page 112

Setting up Your Own Discussion

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

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

   The name should be meaningful so that other participants know what the discussion is about.
6. Click on *Save*.
7. Click on ... > *Configure Discussion*.

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

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

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

Writing a Comment

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

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

The comment is saved.

4.10.2 Job Discussion in the Sidebar

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

To use the full range of functions, you must switch from the job discussion in the sidebar to the *Comments* tab. There you can then upload assets to the discussion, for example. See the chapter *Job Discussions Under the Comments Tab* on page 106

View

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

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

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

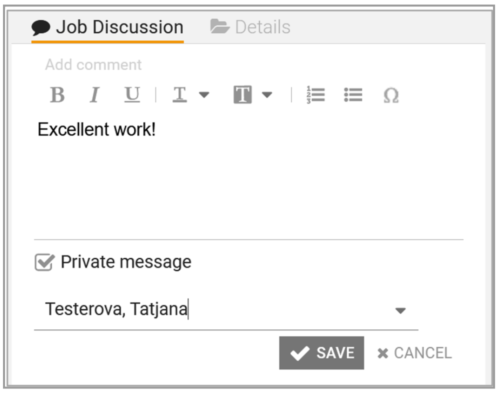
If the discussion area takes up too much space when you are editing a data sheet, you can hide the right sidebar completely by clicking the right arrow ▸ in the center of the separator bar. This will display the data sheet tabs and field variables in full screen width.

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

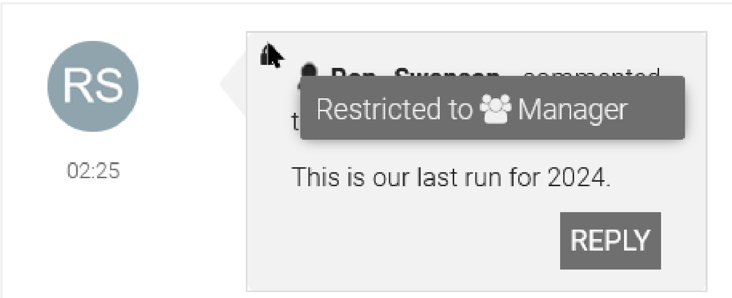
To Write a Comment in Job Discussion in the Sidebar:

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

5. If you wish, you can mark your comment as confidential by checking the box next to *Private message*.



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



6. Click on *Save*.

Your comment will be added to the discussion chronologically.

4.10.3 Sending Messages to Participants

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

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

Sending a Message to All Participants

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

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

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

You have sent a message to all the recipients.

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

Sending a Message to Individual Participants

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

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

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

The message is sent to the selected recipient.

4.10.4 @-Mention

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

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

These are the steps for creating an @-mention:

1. Type @ in the comment field.

   A list of authorized users is automatically displayed.

2. Type the first characters of the name.

   A list of matching users is displayed.

3. Navigate to the required entry in the user list using the arrow keys ↑ and ↓ on the keyboard.
4. Press ⏎ to accept the selected user.

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

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

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

4.11 Change History

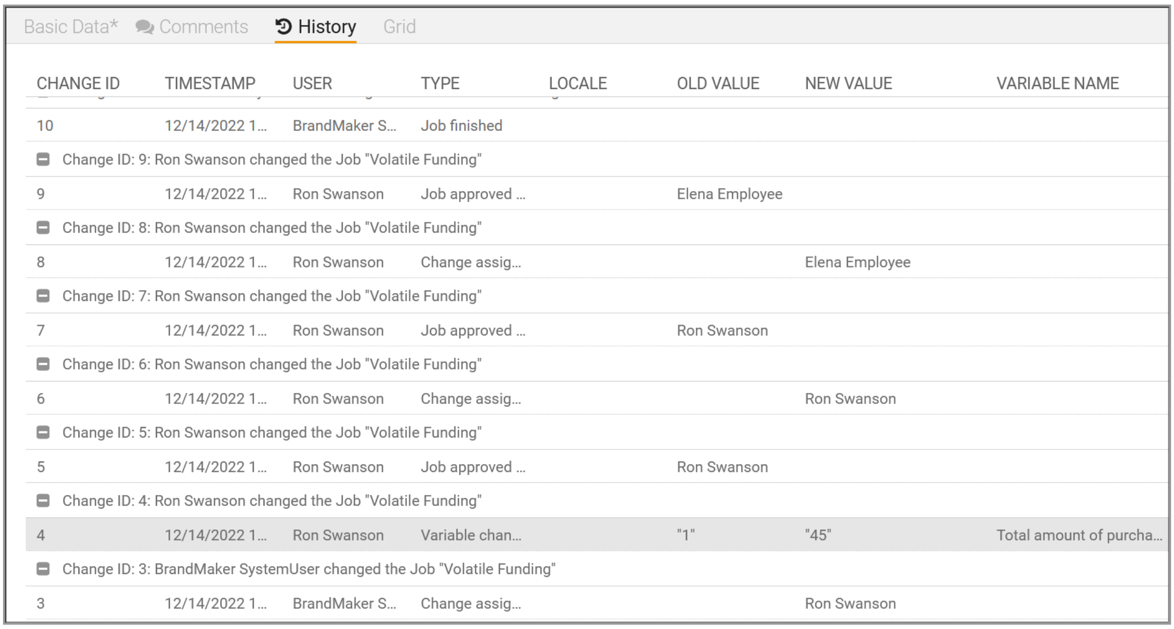
Ron has created or edited a job in the *Jobs* module. After the completion of the job, he wants to know how the job has changed over time. He wants to find out who changed what and why. To do this, he opens the change history and finds all the information he needs. He can filter the changes by date,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

Information in the Change History

This information is displayed in a tabular overview:

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

box.



Basic Data* Comments History Grid

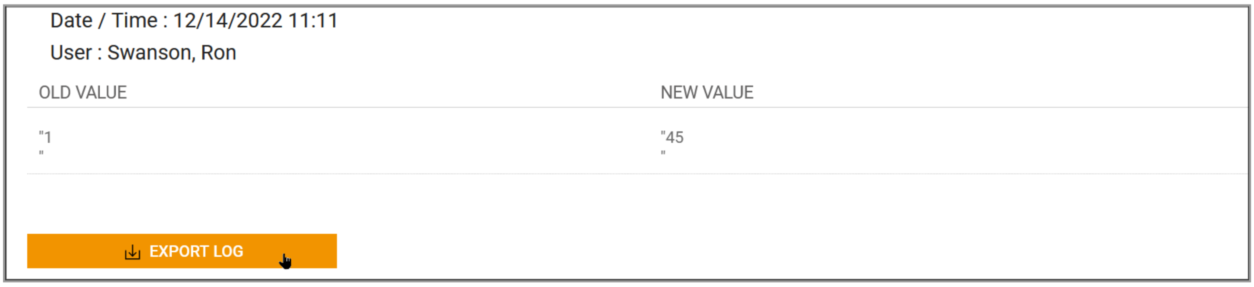
CHANGE ID	TIMESTAMP	USER	TYPE	LOCALE	OLD VALUE	NEW VALUE	VARIABLE NAME
10	12/14/2022 1...	BrandMaker S...	Job finished				
Change ID: 9: Ron Swanson changed the Job "Volatile Funding"							
9	12/14/2022 1...	Ron Swanson	Job approved ...		Elena Employee		
Change ID: 8: Ron Swanson changed the Job "Volatile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

Functions

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

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

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



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

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

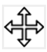
4.12 Prioritizing Elements

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

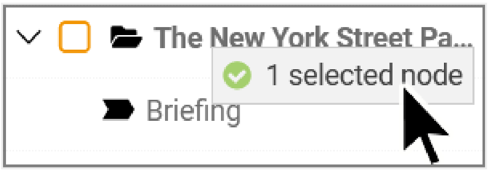
To highlight jobs that need to be processed urgently, you can prioritize the jobs in the Gantt view. The prioritization is available to all users.

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

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

1. Hover the mouse pointer over a job entry (folder icon) in the column on the left entitled *Task Name* so that the mouse pointer changes its appearance to move mode: 
2. Hold down the mouse button and drag the job upwards in the list to the desired position.

   Only one job can be moved at a time.

   The green checkmark on the mouse pointer indicates whether insertion points are possible.
3. Release the job at the desired position.
4. Optional: You can also move a job down in the list to reduce its urgency.

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

Note

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

Archiving Jobs 5

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

Associated Tasks

- *Finishing a Job* on the facing page
- *Canceling a Job* on page 124
- *Deleting a Job* on page 129
- *Reactivating Jobs* on page 134

5.1 Finishing a Job

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

Complete / Finish

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

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

Note

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

EXAMPLE

Ron opens the data sheet of the job and clicks on the *Complete*button in the last workflow in the upper left corner. He enters a comment, presses *Save* to complete the job, which flags it as finished. A finished gets out of the view of all participants. If you have the necessary permissions, you can find it under the *All Finished Jobs*filter.

Completing in the Job Overview

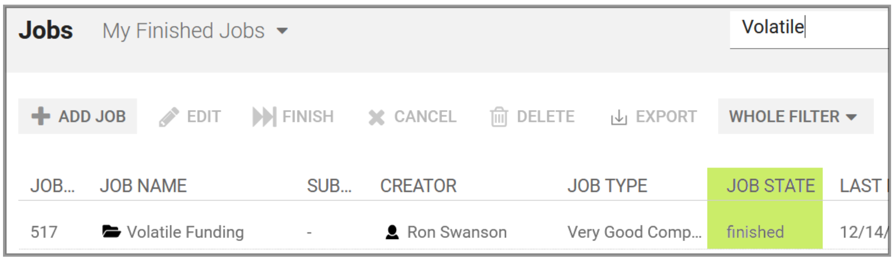
Note

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

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

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

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



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

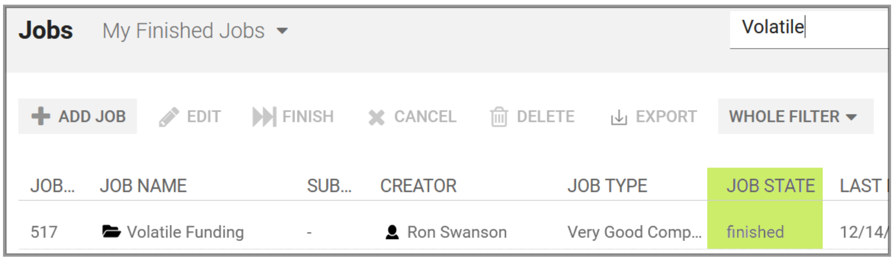
Finishing in an Open Data Sheet

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

   In the open data sheet, the *Complete* button is displayed in the last workflow step.
2. In the upper area of the data sheet, click on *Complete*.

   This opens a dialog box entitled *Finish Jobs*.
3. Optional: Enter a comment if required.

4. Click on *Save*.



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

5.2 Canceling a Job

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

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

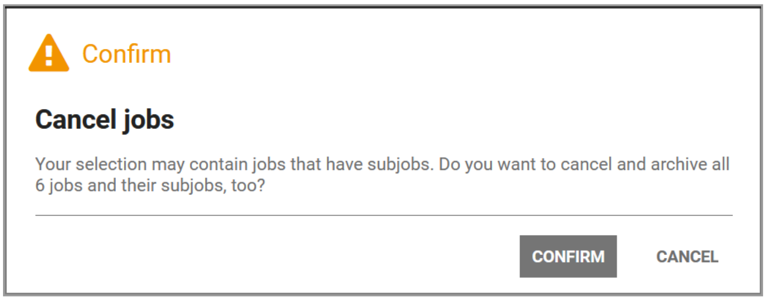
> Note
>
> This action does not make the job disappear permanently. Canceled jobs disappear from the filter view with the to-dos. The job is archived for future reference and possible reactivation.

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

Canceling in the Job Overview

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

    This opens the confirmation dialog box.

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

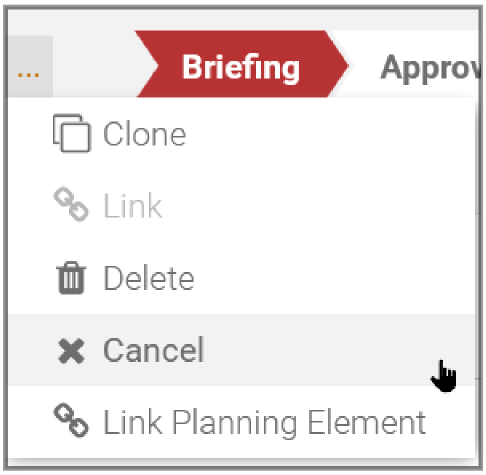
3. Click on *Confirm*.

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

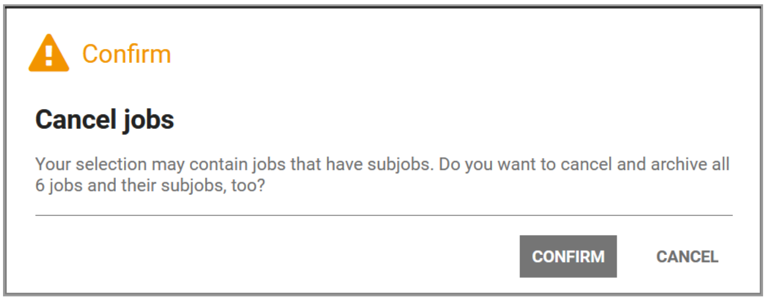
Optional: You can use a filter operation to cancel all filtered jobs at once by calling the menu command *Cancel jobs* in the *Whole filter* menu and confirming the dialog.

Canceling in a Data Sheet

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



3. This opens the confirmation dialog box.

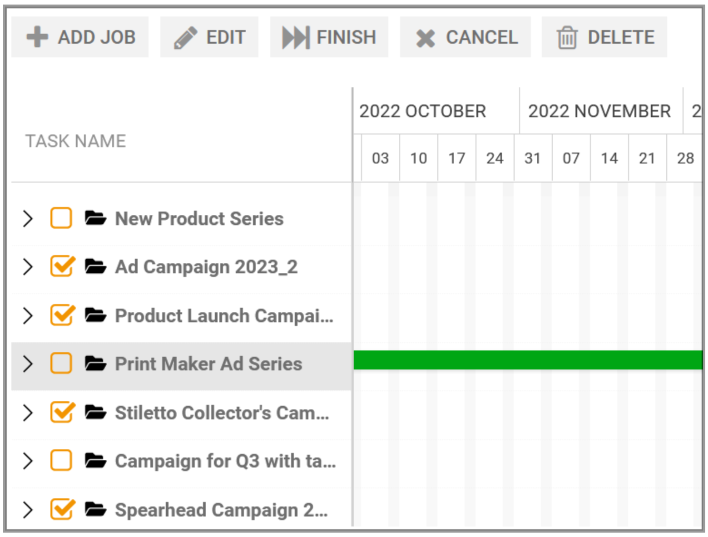


4. Click on *Confirm*.

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

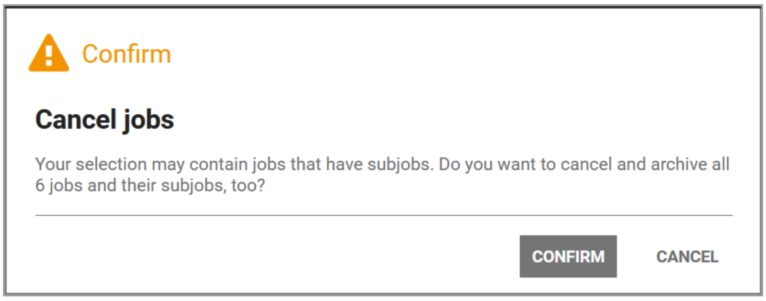
Canceling in a Gantt Chart

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



2. In the button bar, click on Cancel.

   This opens the confirmation dialog box.



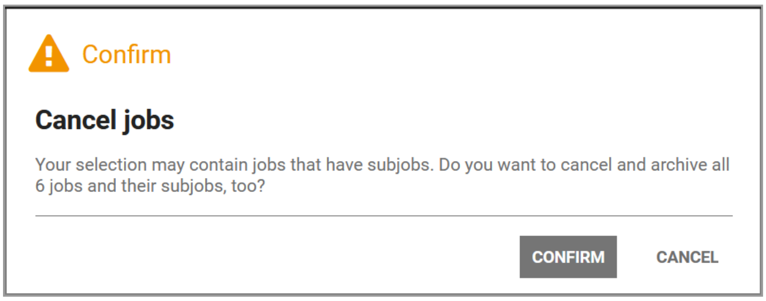
3. Click on *Confirm* to delete the selected jobs or sub-jobs.

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

Canceling in the Kanban View

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

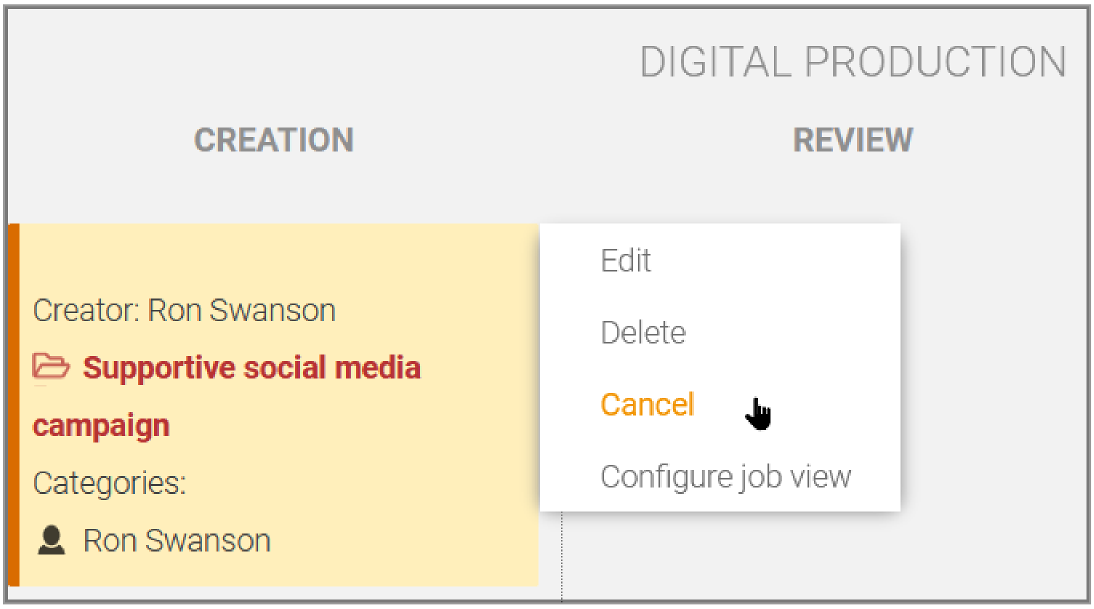
   This opens the confirmation dialog box.

3. Click on *Confirm*.

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

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



Caution

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

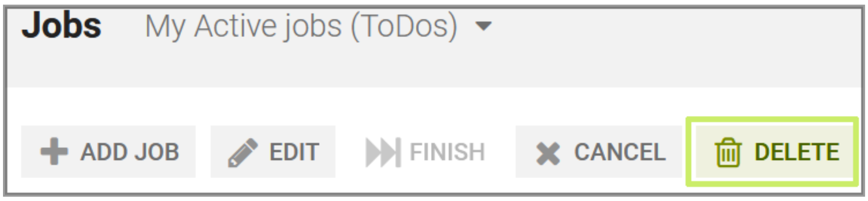
5.3 Deleting a Job

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

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

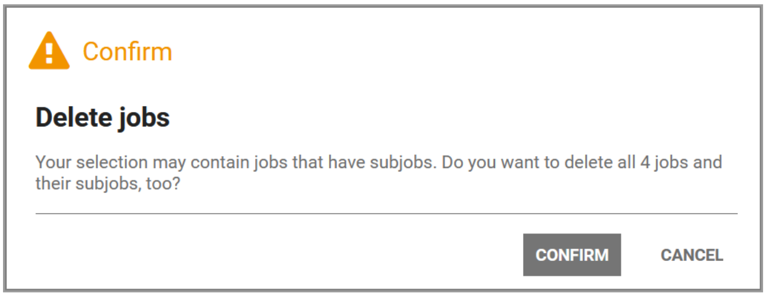
Prerequisite: If the *Delete* button is missing in the job overview, you cannot use this function.

Deleting in the Job Overview



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

    This opens the confirmation dialog box.

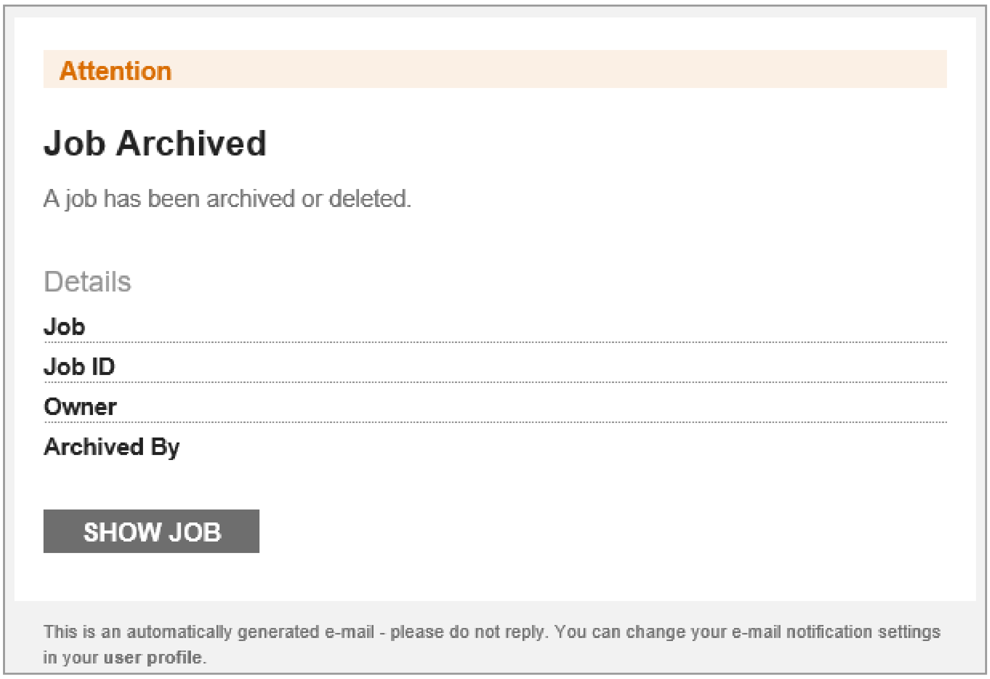
    

3. Click on *Confirm*.

    The selected jobs or sub-jobs are deleted.

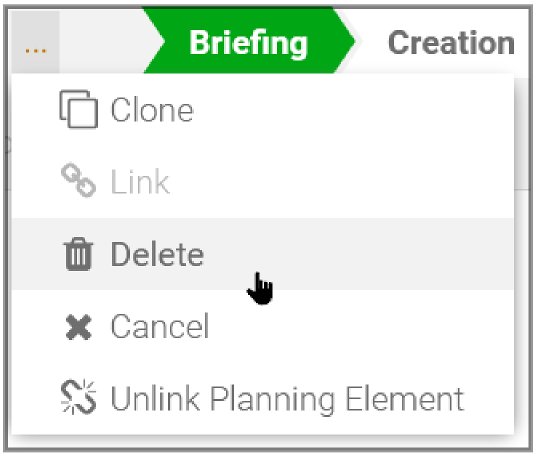
    Optional: You can use a filter operation to delete all filtered jobs at once by calling the menu command *Delete jobs* in the *Whole filter* menu and confirming the dialog.

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



Deleting in a Data Sheet

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



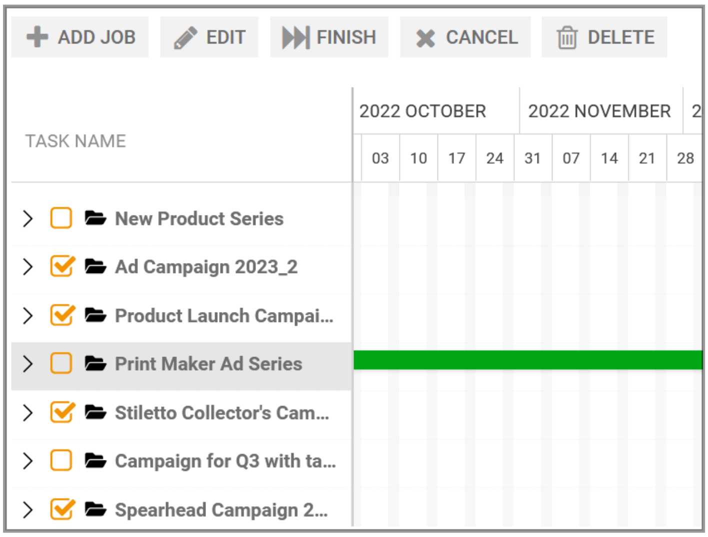
This opens the confirmation dialog box.

3. Click on *Confirm*.

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

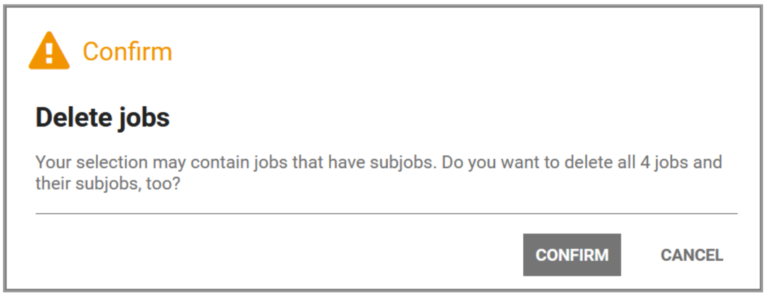
Deleting in a Gantt Chart

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



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

   This opens the confirmation dialog box.



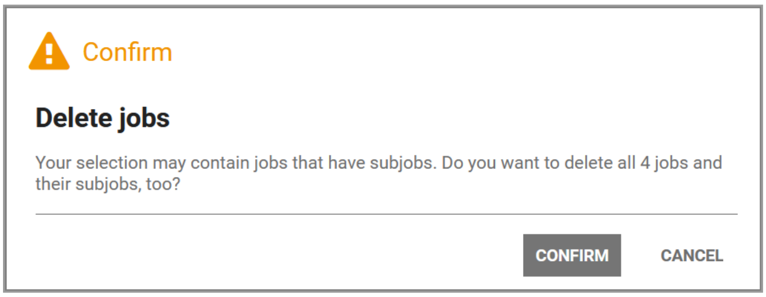
3. Click on *Confirm* to delete the selected jobs or sub-jobs.

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

Deleting in the Kanban View

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

    This opens the confirmation dialog box.

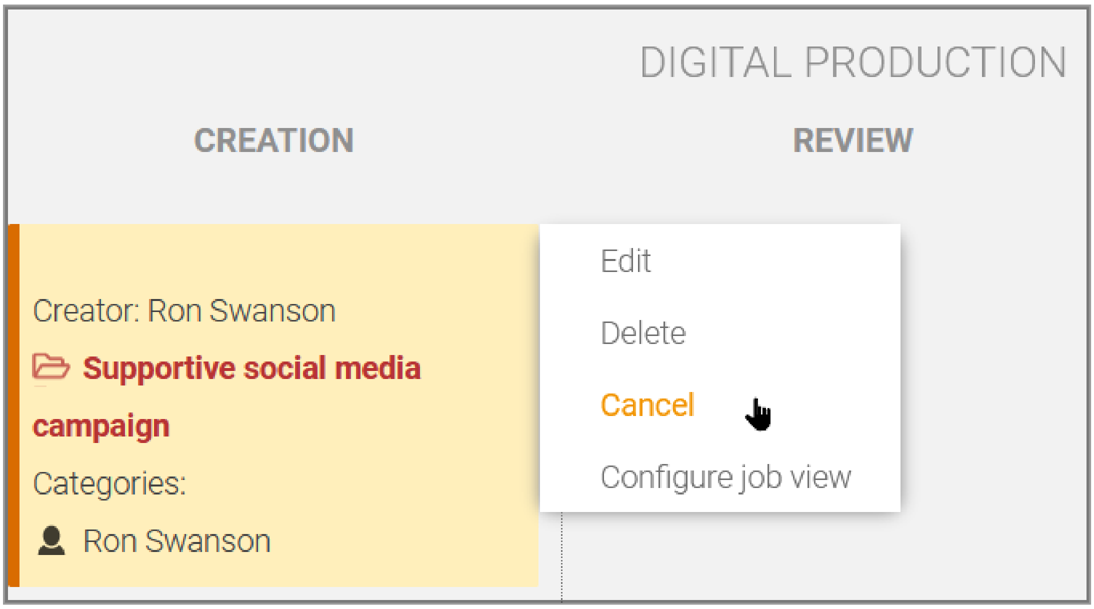
    

3. Click on *Confirm*.

    This deletes the selected jobs or sub-jobs.

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

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



Caution

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

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

5.4 Reactivating Jobs

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

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

How and in Which Workflow Step Can I Reactivate?

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

BPMN-based jobs

> Note
>
> In the case of canceled and finished jobs, the button is not displayed if the underlying BPMN type has already been deleted by the administrator. Reactivation is then strictly excluded.
>
> Currently, BPMN-based jobs that have been deleted cannot be restored, even if they were finished or canceled correctly beforehand.

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

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

Screenshot with four workflow steps as restore points:

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

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

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

You have reactivated a finished or canceled BPMN-based job in the selected workflow step for editing.

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6

More Functions

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

- *XML-Export* on the facing page

6.1 XML-Export

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

Prerequisite: The user role must have appropriate permissions to initiate exports in the *Jobs* module. For users without this permission, the *Export* button and the *Export* page are hidden.

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

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

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

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

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

Note

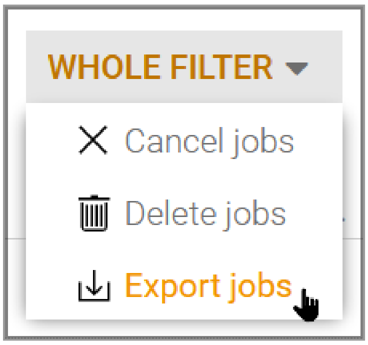
The *Import* function and the associated permission, which were still available in previous versions, have been removed from the user interface and the system.

Associated Tasks

- *Exporting Jobs* on the next page
- *Downloading an Export* on the next page
- *Canceling an Export* on page 141
- *Deleting an Export* on page 141

6.1.1 Exporting Jobs

1. In the job overview you can filter the jobs that you want to export.
2. Click on > *Whole filter* > *Export jobs*.



   An info message appears.

3. Confirm the message by pressing *OK*.

The export is performed in the background. When the export is finished, you will be notified by e-mail and you can then download it from the *Exports* page. See Downloading an export.

6.1.2 Downloading an Export

Large exports can take some time, therefore the system will send a notification e-mail when your download is ready. To download a completed export in the system:

1. Navigate to >*Jobs*> *Exports*.
2. Hover the mouse pointer over the export in the *Available for download* area.

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

3. Click on the download icon.

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

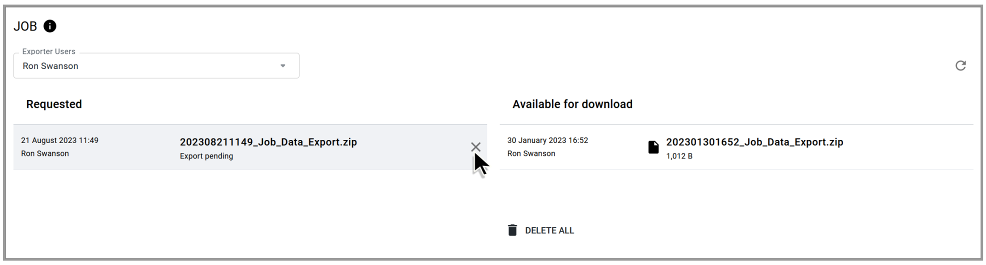
You have downloaded the export.

6.1.3 Canceling an Export

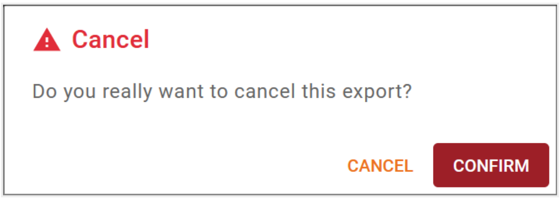
To cancel a requested export:

1. Navigate to *>Jobs> Exports*.
2. Search for the export in the *Requested* area and move the mouse pointer over it.

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

   The *Cancel* dialog box opens.

4. Click on *Confirm*.

You have canceled the export.

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

6.1.4 Deleting an Export

To delete a completed export in the system:

1. Navigate to *>Jobs> Exports*.
2. Hover the mouse pointer over the export in the *Available for download* area.

A trash icon will appear next to the download icon.

3. Click on the trash icon.

   The *Delete* dialog box opens.

4. Click on *Confirm*.

You have deleted the export.

