IBM Unica Marketing Operations
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User's Guide

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Table of Contents

Preface

Contacting IBM Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

Information you should gather

Before you contact IBM Unica technical support, you should gather the following information:

- A brief description of the nature of your issue.
- Detailed error messages you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System Information" below.

System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under each application's installation directory.

Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (http://www.unica.com/about/product-technical-support.htm).

1 Introduction

What does Marketing Operations do?

IBM Unica Marketing Operations provides a complete enterprise planning, collaboration, and workflow solution developed just for the needs of marketers. You can use IBM Unica Marketing Operations to get a comprehensive and holistic view of all marketing projects across your company. You can then focus on improving each dimension of marketing planning. Everyone on the marketing team - chief marketing officers, marketing managers, event planners, creative directors, marketing controllers - realizes immediate benefits in efficiency and performance.

IBM Unica Marketing Operations is the marketing resource management (MRM) solution that allows you to plan, budget, and monitor every type of marketing program in your company.

Use IBM Unica Marketing Operations to perform the following tasks.

- Get real-time visibility into every marketing program.
- Manage all marketing activities, including advertising, brand management, direct and interactive marketing, promotions, events, collateral, research, public relations.
- Enforce marketing "best practices."
- Increase productivity and optimization of resources, including people and budgets, through automated workflow, collaboration, and unique optimization capabilities.
- Promote effective management of marketing content and projects created by dynamic marketing organizations.
- Manage the workflow and projects across the entire marketing operation, for all types of media, events, campaigns, and brand loyalty efforts, from mailers to ad campaigns, from catalogs to seminars.

Why use Unica Marketing Operations?

By using IBM Unica Marketing Operations, marketers can increase the return and lower the risk of all their resource investments by optimizing decisions, collaborating across programs, operating more efficiently, and gaining greater visibility into what they are doing, what they are spending money on, and what the results are.

Marketing Operations allows you to do the following.

- **Manage and coordinate all your marketing activities in one solution.** Because all relevant marketing information is in one place, there are fewer misaligned investments. Centralization leads to tighter controls over which marketing programs are launched. As a result, greater operational efficiencies are gained, allowing marketers to get to market rapidly and spend more time on strategy.
- **Improve decision making, minimize risk.** The marketing measurement provided by using IBM Unica Marketing Operations enables marketers to focus on the most profitable opportunities. Additionally, marketers make better tactical decisions, because the marketing mix is more easily optimized and competing messages can be eliminated.
- **Ensure strategic goals and marketing activities are aligned.** Strategic goals, marketing plans, and budgets are centralized to promote clarity of agreed upon objectives and tactics to achieve business goals. The result is improved alignment of marketing plans and activity.
- **Achieve faster, lower cost execution of all marketing activities.** Rather than reconciling individual project plans, chasing down approvals, and manually tracking creative changes, project plans and assets are centralized, and approvals are clear and automated. Waste is eliminated, because better execution results in less duplication of effort, fewer rush fees and penalties, and allocation of resources to the right programs.
- **Ensure compliance.** By relying on the centralized repository and advanced reporting capabilities in IBM Unica Marketing Operations, marketers reduce time and money spent satisfying demands from regulatory agencies, corporate auditors, and management oversight.
- **Open, flexible architecture.** IBM Unica Marketing Operations is based on an open architecture that makes it easy for IT to implement and allows you to leverage your existing infrastructure and data. Marketing Operations utilizes a 3-tier J2EE architecture, which separates the client, web server, application server, and backend data sources.

Related Topics

- To set your basic options

Who uses IBM Unica Marketing Operations?

Your marketing department and any outside interested parties can benefit from using IBM Unica Marketing Operations. People who benefit include the following.

- Executives who want to create strategic plans and manage their set of core marketing metrics.
- Executives outside the group who need visibility into the group's activities.
- Senior managers who contribute projects, allocate resources, and perform high-level monitoring.
- Managers for lines of business, channels, or geographies who need to define and track projects, automate the approval process, and track costs.
- Brand managers and advertising executives who want visibility into the entire corporate communications plan.
- Database marketers who create activities and tasks, track "To Do" lists, and send, receive, and monitor notifications.
- Constituents who carry out the plan.
- External vendors who may have a role in the marketing plan.

Integration with IBM Unica Campaign

Marketing Operations optionally integrates with IBM Unica Campaign, which, in turn, can integrate with several other products. When Marketing Operations and Campaign are integrated, you can use the marketing resource management features in Marketing Operations to create, plan, and approve campaigns.

For information about working with an integrated system, see the *IBM Unica Marketing Operations and IBM Unica Campaign Integration Guide*.

Using Unica Marketing Operations

Before you start using IBM Unica Marketing Operations, your administrator must install Marketing Operations and set it up. If you are having problems, contact your administrator.

The following steps outline some of the major tasks users perform in IBM Unica Marketing Operations.

1. Create plans that contain programs.
2. Create programs that contain projects.
3. Create more projects, request a project, accept a request, start a project, or view projects.
4. Work in projects by navigating through them, completing the setup of workflows, viewing and modifying tasks, and printing, copying, and deleting the projects.
5. Work with assets, including adding, editing, and changing the status of assets, as well as adding folders.

6. Work with approvals, including adding an approval process; submitting it for review; canceling the review; modifying, printing, and deleting it; putting the approval on hold; responding to it; and marking up approval items with comments.
7. Create invoices that keep track of expenses related to programs and projects.
8. Search for projects and approvals using both the standard and advanced search capabilities, and save advanced searches for future use.
9. Collaborate with other users using the alerts window and the message board.

Related Topics

- To sign in to IBM Unica Marketing Operations
- Plans
- About programs
- Projects
- Assets and asset libraries
- Approvals
- About invoices
- Alerts
- Message board

Business processes

A **business process** is the representation, in IBM Unica Marketing Operations, of a collection of related, structured activities—a chain of events—that produce one of the following.

- marketing activities targeted at a particular set of prospects and/or customers
- reusable marketing components that support these marketing activities.

IBM Unica Marketing Operations provides the following types of business processes.

- Plans
- Programs
- Projects
- Subprojects
- Project requests
- Approvals

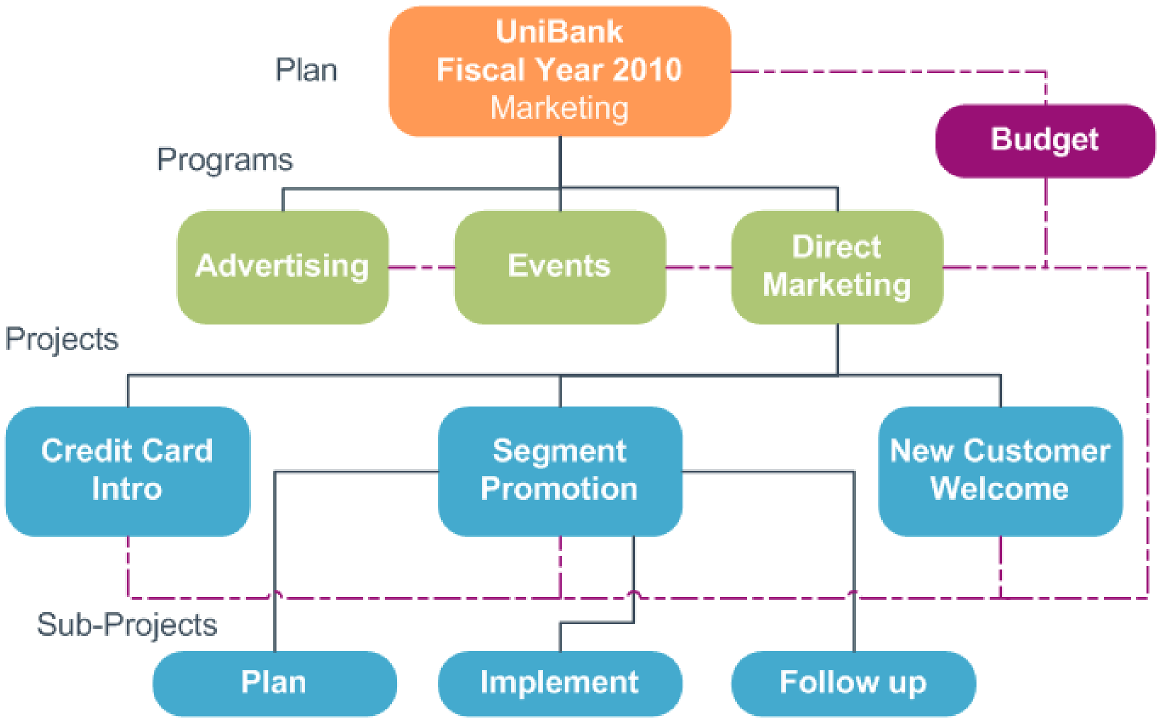
Related Topics

- Plans
- Programs
- Projects
- Project requests
- Approvals

Relationship of planning objects

This section details how planning objects (plans, programs, and projects) relate to one another. Plans contain one or more programs, and programs contain one or more projects.

Projects can contain subprojects. A budget for a plan consists of individual line items for projects and programs that roll up into the budget for the plan.



On the summary page of projects and programs, there is a field, Parent Items and Code, that contains a view of the ancestors for the object. For example, the summary page of a subproject shows the current object (a subproject), its parent project, and all of its ancestors back to its root plan. The ID codes for these objects are displayed, as well as direct links to each of the ancestor objects.

Plans

A **plan** is intended to capture the objectives of a given business unit/area, for a given period of time, typically measured yearly or quarterly. Additionally, a plan serves as a container and "rollup" point for the various programs and projects that you define in order to meet your marketing goals.

Information from "child" programs and child projects of the programs roll up to the plan, tracking linked information. For example, for a plan that has a child program, you can make metrics or budget information related to the program roll up—or move upwards from the program—to the plan, so that you can study and keep track of this information from the perspective of the plan.

Related Topics

- Summary information for plans
- Plan views
- Fiscal year for plans

Programs

A **program** represents a marketing activity and it is typically comprised of multiple related marketing deliverables or initiatives. A program can contain or group multiple projects. The program itself has information that is central or common to the development and execution of these marketing deliverables. For example, a direct marketing program could contain multiple projects each representing a distinct marketing promotion or campaign. Also, a product launch program could contain projects pertaining to various types of collateral development, analyst briefings, and tradeshow attendance.

Projects

A **project** represents all the information related to developing and executing one or more related marketing deliverables or initiatives. This information can include a checklist or schedule of tasks that people working on the project must perform in order to prepare and produce the deliverables for the project.

For example, you might use a project called **Monthly Tradeshow** to collect all the information needed for the one tradeshow each month that your organization attends. This information could include who attends the show, what equipment you need in the booth, copies of demos of the product that you intend to present, collateral you want to hand out to customers, costs of promotional materials, and any additional information that pertains to the tradeshow.

Projects can have subprojects. A **subproject** has all the same characteristics as a project. A subproject is linked to a parent project; any project linked in this manner is referred to as a subproject.

Related Topics

- Creating projects and requests
- Team projects and requests
- Team projects lifecycle
- Reconciliation
- Request statuses
- Project views

Project structure

A project contains a workflow, budget information, metrics, digital assets, approvals, and both standard and custom information. Of course, not every project needs all of this information; most of it is optional and can be filled in only when needed.

Note that approvals can also exist independently from projects. That is, an approval does not need to be associated with a particular project.

Project requests

A **project request** is similar to a work order, or creative brief. It represents a request for someone else to do work according to the requester's specifications.

There may be times when users within an organization or outside vendors would like to request a project. For example, as an outside vendor, you may submit a project request to the marketing services organization requesting some collateral. The marketing services representative accepts the request and creates a project, organizing and assigning resources to the project in order to manage the creation of the collateral.

If you request a project, you are a *requestor*. You then submit the request to a *recipient* for approval. Once the recipient accepts the request, the recipient owns the project and is called the *owner*.

A project request does not contain a workflow. Once the request is approved and transitions to a project, it contains the appropriate workflow.

Approvals

An **approval** allows you to streamline and track the process of having your work reviewed and approved. This allows many users to review work in parallel or in an order that represents your business processes. Reviewers (or approvers) can electronically mark up content submitted for review. IBM Unica Marketing Operations then records approvals and denials for audit purposes. You can tie approvals to a project or they can exist independently from any project.

Related Topics

- About approvals
- Approval dates
- Due dates for approvals
- Approval views

Collaboration tools

Use the following IBM Unica Marketing Operations functionalities to communicate information to other users.

- Teams

- Alerts
- Attachments
- Message boards
- Metrics
- Workflows
- Functional roles
- Security policies

Related Topics

- Teams
- Alerts
- Attachments
- Message Boards
- Metrics
- Workflows
- Functional roles
- Security policies

Teams

A **team** is a group of people who work together to complete tasks across a number of different business processes. Someone in charge of a business process can assign tasks to a team, rather than an individual, when necessary.

Team leaders can then manage their resources across initiatives. Team leaders can decide to explicitly assign work to team members or allow team members to assign work to themselves. In all cases, the team leader can monitor the queue of work assigned to their team and track the progress and performance of individual team members.

Alerts

Alerts are notifications of important events or actions you need to take regarding a program, project, a project request, asset, account, approval, or invoice. An alert could remind you that a project is running behind schedule or over budget, or that there is an item that needs your approval.

You receive alerts directly through IBM Unica Marketing Operations and through email. When you receive an alert through Marketing Operations, you go to the Alerts page to view it. When you receive an alert through e-mail, it goes directly to the inbox of your e-mail application.

There are two types of alerts in IBM Unica Marketing Operations.

- alerts that Marketing Operations sends based on events, such as the start of a project, or

- alarms that an administrator sets up to send at regular intervals, such as once a day.

Attachments

Team members can attach relevant documents to the main IBM Unica Marketing Operations objects. An **attachment** is a URL, digital asset, or a file that you add to a Marketing Operations object. You can add attachments to plans, programs, projects, invoices, approvals, and accounts.

Attachments can be organized by category. For example, your project might contain the following attachment categories.

- Reference Materials
- Vendor Forms
- Offer Creatives
- Deliverables

The attachment categories are set up in the template used to create the particular object.

Message Boards

A **message board** is a place to post and read messages pertaining to a particular object. Plans, programs, projects, requests, accounts, approvals, and invoices can each have their own message board.

Useful for less formal collaboration, message boards allow team members to log comments and keep track of responses.

Metrics

Metrics are used for management reports and analysis. You view them on the Tracking tab for plans, programs and projects.

Use IBM Unica Marketing Operations metrics for the following calculations.

- Automatically calculate internal measures (such as budgets and resource consumption).
- Automatically tabulate program results, such as the following.
  - measure consistently across activities.
  - aggregate results across programs.
- Automatically link key metrics (such as number of contacts and responses) from campaigns back to project metrics.
- Build a marketing memory.

The metrics that are available in a plan, program, or project depend on the template you used to create it.

Workflows

A **workflow** allows you to view and edit the group of tasks and milestones that drives the project. It allows you to efficiently meet and manage project goals. Tasks, dependencies, and durations are populated for a workflow based on the template used to create it. You can view workflow information as either a spreadsheet, timeline, or process flowchart. You can use workflows to forecast and plan your activities. Once work has begun, workflows make it easy to monitor progress and identify bottlenecks.

Functional roles

When setting up a project, one part of that process is assigning individuals to tasks based on the individuals' functional role or job role, such as writer, graphic artist, or project manager. IBM Unica Marketing Operations uses the concept of roles as a bridge between people and tasks. Roles are useful for the following reasons.

- People come and go: assigning a role to a task makes it easier to control people leaving and returning a project.
- Resources are not always available: you can assign a role to a task before any people are available to fill the role or perform the task.
- Roles are predictable: you can create project templates with standard roles and fill people into the roles independently for each project you create from the project template.

Security policies

A security policy is a set of rules that govern any objects (such as projects or programs) that are associated with the policy. These rules indicate which types of users will be able to view, modify, delete or perform any of the other relevant functions for these objects.

In order to express these rules, security policies contain tje following.

- user roles to identify the types of users, and
- function grants or blocks to identify what each type of user can or cannot do.

Multiple Security Policies are allowed, and one example security policy, **Global**, is provided with IBM Unica Marketing Operations.

The global policy is a special policy that is always considered in the governance of all objects in the system (rather than all users). Companies with simple security models need only utilize the global policy to express their rules.

Companies that require different groups to be kept in discrete groups from one another will utilize custom security policies to do so, and use the global policy only for system-wide administrative or executive access rules.

The term **global** is not intended to indicate that every user has full (global) access to everything, but rather that the security policy is, by default, globally-associated with every user.

Details of security policies are discussed in the *IBM Unica Marketing Operations Administrator's Guide*.

Strategic planning and financial management

IBM Unica Marketing Operations includes strategic planning and financial management functionality that allows you to do the following.

- Develop top-down budgets for marketing plans and the programs they contain.
- Track actual expenses incurred, with respect to budget.
- Facilitate spend tracking and reporting in Accounting (GL) terms.

In IBM Unica Marketing Operations, you use the following to perform Strategic Planning and Financial Management tasks.

- Accounts
- Budgets
- Cost Categories
- Invoices

Related Topics

- Accounts
- Budgets
- Cost categories
- Invoices

Accounts

A top-level **account** represents a specific corporate general ledger account established by a finance department for the purpose of tracking and controlling expenditures and cash flows for a certain area of the business. This account tracks budget needs and expenditures at weekly and monthly levels and then aggregates them to quarterly and yearly levels.

Accounts may have subaccounts. Depending on the account structure at your company, the subaccounts also may represent specific general ledger accounts, or they may have been created to represent a greater level of granularity that marketing wants to track, even if the general ledger structure doesn't include that level of detail.

Budgets

In IBM Unica Marketing Operations, a budget allows you to plan expenses that will occur as you execute your plan, program, or project. After setting the plan budget, you can fund linked programs, and ultimately projects, from it. Marketing Operations tracks budgets of child programs and projects in the form of allocations, forecasted or committed spending, and actual expenses.

IBM Unica Marketing Operations tracks budgets of child programs and projects, although these objects may have different owners. For example, a program linked to a plan may have a different owner than the plan itself. As such, the person who allocates a budget from a plan down to a program may be different from the person forecasting expenses from a program up to a plan. Marketing Operations allows a plan owner—a marketing manager for example—to track of expected expenses from child programs and projects as well as the plan budget itself, and remain responsive to budgetary needs.

Budgets are available only when the Marketing Operations financial module is enabled.

Fiscal year

You can view the total budget for all years, or see a detailed view for a particular year broken down into weeks, months, or quarters.

IBM Unica Marketing Operations keeps budget information for the current fiscal year, the next two fiscal years, and any past fiscal years dating back to when you first installed Marketing Operations.

On the plan level, to view or edit a different fiscal year, change the **Fiscal Year** field value on the Plan Summary tab. Linked programs and projects take the financial year from the parent plan; standalone programs and projects use the system's current fiscal year.

Granularity

IBM Unica Marketing Operations allows you break fiscal years into weeks, months, or quarters. When creating a new plan, program, or project, choose the desired increment from the drop-down **Budget Granularity** on the Summary tab.

Users is not allowed to edit budget granularity. Plans, programs and projects with different budget granularities are not allowed to be linked together.

For example, if a plan’s fiscal year is broken into months, you can link it only with programs and projects with months as the budget granularity; in this scenario, programs and projects with weeks or quarters as their granularity are unavailable for linking.

For more information about linking plans, programs, and projects, see To link and program to a plan, To link an existing project to a program, and To link a child project or request to a project.

Cost categories

Cost Categories are used to categorize expenses into types, such as travel expense, mailing expense, and so on. For details on creating and editing cost categories, see the *IBM Unica Marketing Operations Administrator’s Guide*.

Cost categories are used both when tracking invoices and creating budgets.

Invoices

In IBM Unica Marketing Operations, an **invoice** electronically captures a paper invoice submitted to a marketing department for services, time, or materials provided by a third-party vendor or supplier. You must manually enter the information captured in paper invoices into an Marketing Operations invoice.

Here are some advantages of transferring your paper invoices to IBM Unica Marketing Operations.

- Easy accessibility
- Accurate and immediate expense tracking
- Vendor spend analysis
- Rollup reporting
- Periodic transfer or export to a general ledger (GL) system

Libraries of reusable elements

IBM Unica Marketing Operations allows you to reuse marketing items by providing the following.

- Marketing objects
- Digital Asset Management

Related Topics

- Marketing objects
- Digital asset management

Marketing objects

You can create new marketing objects if you have permission to do so. Once you create a marketing object, you can start it at any time. Starting the marketing object makes it active.

A **marketing object** is any work product a team develops and reuses in the course of its marketing activities. A marketing object can represent either a physical item, such as a letter, credit card, or banner ad, or a business component, such as a credit card offer, a target segment definition, or a rewards program definition.

- You define and manage marketing objects that represent all reusable work products.
- You can perform basic operations (create, edit, change state, copy, link, and delete) on marketing objects.
- You enter and manage all of the attributes that define a particular marketing object, such as name, owner, state/status, description, etc.
- You can define and manage business processes (such as projects) that produce, modify, and retire marketing objects.

- You can construct robust projects which define multiple marketing activities by “assembling” each discrete marketing activity from existing marketing objects.

IBM Unica Marketing Operations marketing objects are defined in stages, and how they are defined influences how they are organized and presented to users. The following terms are important in understanding the definition and organization of marketing objects.

Marketing object type

A **Marketing object type** is the highest-level division for marketing objects. An administrator creates marketing object types. Each marketing object type has a menu item, but the menu on which it appears depends on how the administrator configured the marketing object type.

Marketing object template

A marketing object type is broken down into one or more **marketing object templates**. Typically, an administrator creates a marketing object template for each significant characteristic for the marketing object type.

Marketing object instance

A **Marketing object instance** is a single marketing object. Users with the proper security permissions create marketing object instances from marketing object templates. Throughout the documentation, we refer to marketing object instances simply as “marketing objects.”

Digital asset management

An **asset** is any electronically stored document that you may want to use or reference in a marketing program. This can include brand images, marketing research documents, reference materials, corporate collateral, letterheads, or document templates.

You can store all marketing assets in a secure, central location, using IBM Unica Marketing Operations Assets, with the following advantages.

- leverage concepts that were approved in previous marketing campaigns
- require pre-approval of material to reduce review times
- assign usage guidelines and expiration dates to items.

Additionally, assets contained in Approval objects have integrated mark-up capabilities, enabling collaboration between staff and agency partners and tracking of comments, edits, and changes within creative content.

To sign in to IBM Unica Marketing Operations

To use IBM Unica Marketing Operations, you must sign in. If you are uncertain of the correct URL or you need a user name or password, contact your administrator.

1. Open your web browser.

   If you are using a Safari browser, and you are experiencing cache-related problems, for example, icons have been updated but new ones are not showing, you can manually empty the cache by pressing **Command+Option+E** or choosing **Empty Cache** from the Safari menu.

2. In the address field of the browser, enter the web address (URL) for IBM Unica Marketing Operations. For example:

```
http://unicaserver:7001/plan/
```

3. If your administrator set up security for IBM Unica Marketing Operations, the application prompts you to accept a digital security certificate the first time you log in. Click **Yes** to accept the certificate.

   The IBM Unica Marketing Operations sign in screen appears.

4. Enter your user name and password, then click **Sign In**.

If your sign in is successful, IBM Unica Marketing Operations displays the main application screen. Depending on how your administrator configured your options, you may see the Programs List page or the Projects List page.

About customizing Marketing Operations

Users can customize the Marketing Operations interface to meet their needs. These settings are available in the Marketing Operations Settings. The following table describes what you can customize.

Option	Description
Basic Settings	Use these options to set your default security policy.
Analysis options	Use this option to set a default report to be displayed when you go to the Analytics Home page and to set the Analytics Home page as your login page in Marketing Operations, if desired.
Projects Options	Use these options to customize the way you work with projects.
Task Options	Use these options to customize the way you work with tasks.
Approvals Options	Use these options to customize the way you work with approvals.
Calendar/ Timeline Settings	Use these options to customize how you view the system calendar.

Related Topics

- To set your basic options
- To set your project options
- To set your task options
- To set your approval options

To set your basic options

Your basic options allow you to choose the security policy used by default when you create new items.

1. Select **Settings > Marketing Operations settings**.

   The Administrative Settings page opens.

2. Click **Basic Settings**.

   The Basic Settings page opens.

3. Select the security policy you want to use by default when you create new items in Marketing Operations in the **Default Security Policy** field.

   You can leave **Global** selected, which is the default, to use the global security policy set up by your administrator, or you can select a security policy that your administrator instructed you to select. As a best practice, do not change the security policy without the guidance of your administrator. For more information on security policies, contact your administrator or see the Marketing Operations Administrator's Guide.

4. Click **Save Changes** to save your changes.

Related Topics

- To set your task options

To set your Analysis options

By default, the Analytics Home page shows a list of all available reports. Your Analysis options allow you to set a default report to be displayed when you go to the Analytics Home page.

1. Select **Settings > Marketing Operations Settings**.
2. Click **Operational Analytics Options**.

   The Analysis Options page appears.

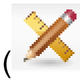
3. Select the report you want as the default report.

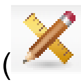
   If at any time the report you select is not available, the list of all available reports is displayed.

4. Click **Save Changes**.

To set your project options

Project options allow you to customize Marketing Operations so you view and receive project information that is important to you. For example, you may want to specify the list of projects that appears by default when you open the Projects page.

You set project options through the **Options** icon () on the Projects page. A subset of these options is also available through the Administration page. To easily access these options, we recommend you set them through the **Options** icon on the Projects page.

1. Select **Operations > Projects**.
2. Click the **Options** icon ().

   The Projects Options page appears.
3. In the **Default List** field, select the default project list view to appear when you open the project list page.

   By default, the **Active Projects and Requests** view appears in this field (unless you previously changed the setting.

   If you have any saved searches, this list also includes that information.
4. In the **Default View Mode** field, select the default list view mode that appears when you open the Projects page. You can display projects in a list view or a calendar view.
5. In the **Optional Project Columns** field, select any optional project columns to add to the current project list view.

   Note that the columns you select here appear only on this specific project list view.
6. Click **Save Changes** to save your changes.

The settings you chose remain in effect for all of your Marketing Operations sessions.

Related Topics

- About optional project columns

About optional project columns

For **Project List** view pages, you can customize which columns appear in the list.

When you select optional columns, note that you select them for a particular view.

For example, if you select an optional column called **Objectives** in the **Active Projects and Requests** view, this column does not appear in the **All Projects and Requests** view.

The column choices in the **Optional Columns** field include all fields used in all project templates in the system. Template creators define fields in project templates. Some projects that appear in the Project list view may have been created with a project template that did not contain a certain field. If a project does not have a field defined, there will be no value in the corresponding column on the project list view.

If you are in the **Project Calendar** view instead of the **Project List** view, in the **Optional Information to Show** field, select any optional project milestones or project start and end dates that you want to view. These milestones and dates appear in the calendar.

Related Topics

• To set your project options

To set your task options

Your task options allow you to customize Marketing Operations so you view and receive task information. For example, you may want to specify the list of tasks that appears by default when you open the Tasks page.

1. Select **Settings > Marketing Operations Settings > Tasks Options**.

   The **Task Options** dialog box appears.

2. In the **Default List** field, select the default Task List view that you want to appear when you open the Tasks list page.

   By default, the **My Tasks** view appears in this field, so Marketing Operations displays only tasks currently awaiting your action when you click **Operations > Tasks**.

   This list also includes saved searches.

3. In the **Default List View** field, select the default list view mode that appears when you open the Tasks page. You can display tasks in a list view (the default) or a calendar view.

4. Click **Save Changes** to save your changes, **Revert to Saved** to discard the changes you made since the last time you saved changes, or **Cancel** to exit the screen.

Related Topics

• To set your approval options

To set your approval options

Your approval options allow you to customize Marketing Operations so you view and receive information about approvals that is important to you.

1. Select **Settings > Marketing Operations Settings > Approvals**.

   The **Approvals Options** page appears.

2. In the **Default List** field, select the default Approval List view that you want to appear when you open the approval list page.

   By default, the **My Active Approvals** view appears in this field; the result is that Marketing Operations displays only your active approvals when you select **Operations > Approvals**.

   If you have any saved searches, this list also includes that information.

Setting your start page

If you do not want to have a dashboard page appear when you first log in to IBM Unica Marketing, you can select a page from one of the installed IBM products as your start page.

To set a page you are viewing as your start page, select **Settings > Start on current page**. Pages available for selection as a start page are determined by each IBM Unica Marketing product and by your permissions in IBM Unica Marketing.

On any page you are viewing, if the **Start on current page** option is enabled, you can set the page as your start page.

2 Common Tasks

About common tasks

Some tasks are not specific to IBM Unica Marketing Operations objects. For example, several objects contain attachments. You work with project attachments in the same way as you work with program or plan attachments.

Related Topics

- Working with attachments
- To change the status of a process
- Using disabled attribute values
- Selecting resources
- To print an object

Working with attachments

You can attach relevant documents to IBM Unica Marketing Operations objects (such as plans, programs, and so on). The **Attachments** tab of an object contains links to all files or URLs related to the object.

IBM Unica Marketing Operations automatically creates a thumbnail for documents, images, PDFs, and web pages when these items are attached or sent for approval. Files types supported are as follows.

- BMP
- Doc
- Docx

- GIF
- htm
- html
- JPEG
- JPG
- pdf
- ppt
- pptx
- RTF
- xls

Note the following limitations.

- By default, IBM Unica Marketing Operations allows you to attach up to five files at once. This number is configurable, and may be different in your system.
- Attachment size is limited to under 2 gigabytes (GB) in size. The exact limitation depends on your browser and operating system.

Related Topics

- Assets and asset libraries
- To add an attachment to an object
- To remove an attachment from an object
- To send e-mail attachments

To add an attachment to an object

Users can add attachments on an ongoing basis.

1. Navigate to the object to which you would like to add an attachment.
2. Click the **Attachments** tab.

   The tab displays any attachments that already exist for the object.
3. Click the **Add** icon () to add an attachment to the object.

   The Add Attachment window appears.
4. From the drop-down list in the **Save Attachment To** field, select where you want to save the attachment.
5. In the **File to Attach** field, select **From My Computer**, **From the Asset Library**, or **URL**.
6. Do one of the following.

- Click **Browse** to search for a file on your computer. When the dialog box appears, navigate to the file you want to attach, and click **Open**.
- Click **Browse Library** to attach a file in an asset library. Click the library that contains the file you want to add and use the tree in the left pane of the screen to navigate to the folder and then the asset that you want to attach. Click **Accept Asset** when viewing the asset in the right pane.
- Enter the URL in the field provided.

7. Add any comments about the attachment.
8. Click **Add More** to display an additional set of fields for each additional attachment you want to add.
9. Click **Save Changes** to add the attachment or attachments.

   The attachments are added to the Attachments tab for the object.

Related Topics

• To add an attachment to a task

To remove an attachment from an object

1. Navigate to the object to which you would like to remove an attachment.
2. Click the **Attachments** tab.

   The tab displays any attachments that already exist for the object.
3. Click **Remove** beside the attachment you would like to delete.

   A message appears asking you to verify the deletion.
4. Click **OK**.

The attachment is removed.

To send e-mail attachments

Users that have a valid e-mail address configured in IBM Unica Marketing Operations or IBM Unica Marketing Platform can send e-mail attachments. If your e-mail address is configured incorrectly in the system, you receive an error message.

1. Navigate to the object to which you would like to add an attachment.

   For approvals and assets, attachments are available on the summary page. For all other objects, click the **Attachments** tab.

   The tab displays any attachments that already exist for the object.
2. Click **Send as Mail Attachment** beside the attachment you would like to send.

   You can also right-click the attachment icon and choose **Send as Mail Attachment** from the menu.

The Send Mail Attachment window appears.

3. Enter or select values in the **To** and **Cc** fields for the email recipients.
   - To send the attachment to IBM Unica Marketing Operations users, click the arrow at the right side of the field and select one or more email addresses. The addresses you select are added to the field. If you deselect an address, it is removed from the field.
   - You can also enter any valid external email address in the fields. Separate multiple addresses by a comma. For example: `user1@inbox.com,user2@myCompany.com`
4. Enter values for the **Subject** field and body of the message.
5. Click **Send** to send the attachment.

   The system displays a message that confirms that the e-mail has been sent or that an error occurred while the system attempted to send the message.

   The Send Mail Attachment window remains open until the e-mail server has sent the message. If you close the window while the mail is being sent, you do not receive any confirmation.

Note the following.

- Any replies to the message go directly to the e-mail address of the sender.
- If you sends an attachment to an invalid address, a message is sent to the user that the e-mail was not delivered.
- If the mail server is down (for the Marketing Operations server), the system displays a message that the attachment could not be sent. You can take either of the following actions:
  - Wait until the mail server is available and try again.
  - Download the attachment to your local machine and use the local client e-mail application to send the attachment.
- If the mail is accepted by the e-mail server for delivery, and it cannot be delivered for any reason (for example, if an email address is invalid) the e-mail server sends the details directly back to the user in the local client e-mail application.

Statuses of business processes

The following table describes the possible statuses for plans, programs, projects, and approvals.

Status	Description
Not started	Indicates the object has been created.
In progress	Indicates work on the object has been started.

Status	Description
On hold	Indicates work on this object should not continue at this time.
Cancelled	Indicates that no users should access the object; work on it has been stopped permanently.
Completed	Indicates that work on the object is finished.
In Reconciliation	(Projects only). Indicates someone is editing a cancelled or completed project. This is a temporary state available to users having the proper security permission.

To change the status of a process

You can change the status of a business process, thereby controlling its lifecycle. Your administrator can set up IBM Unica Marketing Operations to send an alert to owners and members of a process when its status changes.

The following procedure describes how to change the status for plans, programs, projects, marketing objects, and approvals.

1. From the appropriate navigation menu, select the object type.

   For example, click **Operations > Plans** to work with a plan.

2. Click the object whose status you wish to change.

   The object's **Summary** tab appears.

3. Click the **Status** icon and select a status as follows.

   - **Start** <*object*>. Places the object into the In Progress state.
   - **Submit** <*object*>. Used for requests and approvals, places the object into the In Progress state.
   - **Pause** <*object*> (or Stop Review for an approval). Results in a state of On Hold. Available as a choice once you have started the object.
   - **Continue** <*object*>. Results in a state of In Progress. Available as a choice if you have placed an object on hold.
   - **Finish** <*object*>. Results in a state of Completed.
   - **Cancel** <*object*>. Results in a state of Cancelled. Select this option if you want to cancel the object permanently.

   A dialog box appears in which you can add comments. If you select **Completed** or **Cancelled**, you cannot change the status of the object at a later time (except for projects, which you can reconcile after completing or canceling).

4. Click **Continue** to close the dialog box and apply the new status.

Related Topics

- Statuses of business processes

Using disabled attribute values

Throughout IBM Unica Marketing Operations, users select an item or items from a drop-down list. Over time, the items in the lists can change; administrators can add, remove, or disable items from drop-down lists. When an administrator disables an attribute, it affects the behavior of Marketing Operations in the following ways.

- When users perform advanced searches.
- When users edit an existing object that contains a disabled value in one of its drop-down lists.

Related Topics

- Disabled attribute values in searches
- Disabled attribute values in objects
- Disabled attribute values example

Disabled attribute values in objects

When an administrator disables an attribute value, it no longer appears in drop-down lists for new objects. However, users need to consider disabled values in the following situations.

- A user edits a tab for an existing object with an attribute that is set to a disabled value. The attribute is optional.

  If the user edits the attribute, he or she must select an enabled value. However, the user can save the page without editing the attribute (that is, the attribute can be saved with the existing, disabled value).

- A user edits a tab with an attribute that is set to a disabled value. The attribute is required.

  The user must select an enabled value for the attribute. The system does not allow the user to save the data until an enabled value has been set for the attribute.

- A user creates a new object. One tab contains an optional attribute that has a disabled, default value.

  The attribute is set to a blank value.

- A user creates a new object. One tab contains a required attribute that has a disabled, default value.

  The system presents an error message that the attribute is required. The user cannot finish creating the object until he or she sets the value of the required attribute.

Disabled attribute values in searches

When users search on an attribute that contains disabled values, they can select from both enabled and disabled values. This allows users to find objects that contain values that may no longer be used.

Disabled attribute values example

Consider a project template, **Marketing Collateral**, which contains a tab, **Production Info**. **Production Info** contains several attributes, including a required attribute, **Color**, and an optional attribute, **Coating**. The attributes have the following values:

Color (required)	Coating (optional)
(default value)	Gloss Aqueous (default value)
4C	Dull Aqueous
4/4	UV Coating
Black and White	Etched

Tom creates a marketing collateral project, **MC001**, and sets the **Color** to **4/4** and the **Coating** to **Dull Aqueous**.

An administrator then disables the **4/4** and **Dull Aqueous** values.

Tom opens the **MC001** project, and edits the **Production Info** tab:

- He can leave the **Coating** value as **Dull Aqueous**, or set it to any of the enabled values, such as **Etched**.
- He must change the value of **Color** to one of the enabled values before he can save the **Production Info** tab.

The administrator re-enables **4/4** and **Dull Aqueous** values, and disables the default value (**Gloss Aqueous**).

Tom creates a marketing collateral project, **MC002**:

- The value of **Coating** is blank.
- Tom must select a valid value for **Color** before he can finish creating **MC002**

Selecting resources

Throughout IBM Unica Marketing Operations, users can select people and teams as resources. Users add and remove members to planning objects, marketing objects, assets, invoices and approvals. When users perform advanced searches, they can add people and teams to the search criteria.

The list of people available in IBM Unica Marketing Operations is populated from IBM Unica Marketing Platform. Administrators can limit the list of teams and people a particular user sees, depending on the role and permissions for the user.

Save and Return to List

When you create or edit a project, request, or marketing object, you can save your work at any time. If you click **Save and Return to List**, your work is saved and you see a list, saved search, default search, or summary page, as described here.

- If you start a wizard from a saved search or list page, you return to that page.
- If you start a wizard from the **Actions** menu, you return to your default search page for the object type.
- If you start a wizard from the **Manage Linked Objects** menu, you return to the parent program's Summary page.
- If you edit an existing object, you return to the saved search page, if that is where you initiated the edit, or the default search page, if you initiated the edit from the summary page of the project or request.

Column headers

Many IBM Unica Marketing Operations pages contain a summary table, where the rows contain objects (such as program, plans, tasks, etc.), and columns contain characteristics for the object (such as name, status, owner, etc.)

In these pages, you can click the column headers to sort or group the table on the selected column. Clicking a second time on the column name reverses the sort order.

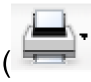
You can determine how data on the page is sorted.

- If a column contains the ▲ symbol, data on the page is sorted in ascending order based on the contents of this column.
- If a column contains the ▼ symbol, data on the page is sorted in descending order based on the contents of this column.
- If the current sort column is any column other than Name, the list is sorted by current sort column, then by the Name column.

To print an object

You can print the current page for many IBM Unica Marketing Operations objects. Use the following procedure to print any of these objects: accounts, approvals, invoices, plans, programs, projects, and marketing objects.

IBM Unica Marketing Operations prints the information found on the tab currently showing.

1. Navigate to the **Summary** tab of the object to print.
2. Select the tab to print and click the print icon () on the Marketing Operations toolbar.

   For some objects, a drop-down menu displays with two choices: **Print** and **Export**.
3. If the menu appears, click **Print**.

   A print dialog appears.
4. Complete the fields in the dialog and click **Print**.

The data on the screen prints to the selected printer.

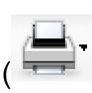
To export information in Microsoft Excel format

You can export information from IBM Unica Marketing Operations to an Excel spreadsheet for programs, projects, and project requests.

You cannot export Tracking, People, Attachment, Workflow, Budget, or Analysis tabs to Excel.

In particular, you can export the Summary tab or a custom tab. From the Program or Project List page, you can export summary information for multiple programs, projects, or requests.

When you export list pages for programs, projects, tasks, and marketing objects, all the items in the list are exported, even if the list spans multiple pages.

1. You can export information for a single object or for a list of objects.
   - To export information to Excel for a single object, navigate to Summary or custom tab of the object.
   - To export a list of objects to Excel, click **Operations > Programs** or **Operations > Projects** and open the view you want to export.
2. Click the Print icon () and select Export from the drop-down menu.

   A window displays, asking whether to Open or Save the file that will be exported. If you are exporting a list, IBM Unica Marketing Operations prints information about all the objects in the current view of the list page.
3. You can either open the item in Excel, or save it to disk.
   - Click **Open** to launch Excel. The information you exported displays on the spreadsheet.

- Click **Save** to save the file. You can then open the Excel spreadsheet, displaying summary information about the object or list of objects.

3 Plans

Plans

A **plan** is intended to capture the objectives of a given business unit/area, for a given period of time, typically measured yearly or quarterly. Additionally, a plan serves as a container and "rollup" point for the various programs and projects that you define in order to meet your marketing goals.

Information from "child" programs and child projects of the programs roll up to the plan, tracking linked information. For example, for a plan that has a child program, you can make metrics or budget information related to the program roll up—or move upwards from the program—to the plan, so that you can study and keep track of this information from the perspective of the plan.

Related Topics

- Summary information for plans
- Plan views
- Fiscal year for plans

Plan views

IBM Unica Marketing Operations organizes plans in views.

- **All Plans** lists all plans. It also contains links to the **Active Plans** view.

- **Active Plans** lists all the plans that are now in the **In Progress** state. This is the default view.

You can also access the different views of plans using the Actions menu. It contains links to the views listed above. In any view, you can change the sort order by clicking on the column you want to sort by. Click the column a second time to reverse the sort order.

Additionally, you can search for a plan.

Summary information for plans

On the plan Summary tab, IBM Unica Marketing Operations lists summary information about a plan, such as status, program areas, security policy, and so on. You are taken to the plan's Summary tab by default when you select a plan from the Plan List page. Any programs linked to the plan are listed on the Summary tab. You can perform tasks such as changing plan status, editing the plan, adding a new program, linking an existing program, or removing a linked program.

Fiscal year for plans

When you add or edit a plan, you choose a fiscal year from a pull-down menu. The fiscal year you choose determines for which year you can edit budget information. IBM Unica Marketing Operations keeps multi-year budget data for plans. The system keeps budget information for the current fiscal year, the next, two fiscal years, and any past fiscal years dating back to when you first installed IBM Unica Marketing Operations.

Viewing budget information

Budget information that you view in Total mode is for the life of the plan. Budget information that you view in Detailed mode is for the specified fiscal year.

Editing budget information

Budget information that you edit on the Budget tab corresponds to the selected fiscal year. You can edit only the budget for one fiscal year at a time. To edit budget data for a fiscal year, edit the **Fiscal Year** value on the summary page for the plan; set the value to the fiscal year that corresponds to the budget data you want to edit.

To add a plan

When you add a plan, you become an owner of that plan.

1. Click **Operations > Plans**.
2. Click the **Add Plan** icon ().

3. Enter a plan name in the **Name** field.
4. Enter a description of the plan in the **Description** field.
5. Click **Add/Remove Members** to add team members to the plan.
6. Enter a plan ID in the **Plan ID** field.

   By default, the **Auto-generate on save** field is checked and IBM Unica Marketing Operations generates a number automatically when the plan is saved. To manually enter a plan ID in the **Plan ID** field, clear the **Auto-generate on save** checkbox.

   The plan ID must be unique.
7. Select the security policy from the **Security Policy** drop-down list.

   This is a required field and defaults to Global (unless an administrator has changed the default security policy).
8. Select a business area in the **Business Area** field.
9. Select a fiscal year from the **Fiscal Year** drop-down list.

   This is the year in which the plan is active. The years from which you can choose are the current year, and the following two years.

   The budget information available on the Budget tab corresponds to the value in this field.
10. Select the program areas to use for programs in this plan in the **Program Areas** field.
11. Click **Save Changes** to save the plan.

To edit an existing plan, click the **Edit** icon ( ) found on the plan Summary tab.

Related Topics

- Fiscal year for plans
- To add or remove a program area

To add or remove a program area

Program areas are subsections of plans, allowing programs that are linked to the plan to be arranged into logical subgroups.

IBM Unica Marketing Operations administrators create the program areas from which you can choose.

1. Follow the steps for adding a plan, until you get to the step of adding a program area.
2. Click the **Add/Remove Program Areas** button, (located under the **Program Areas** field.

3. To add a program area, select a program area from the **Available Program Areas** field and click the right-pointing arrows to add the program area to the **Selected Program Areas** field.

   When you add a program area to the **Selected Program Areas** field, it populates the **Program Areas** field on the plan Summary tab.

4. To remove a program area, select a program area in the **Selected Program Areas** field and click the left-pointing arrows to remove it.

   You cannot remove a program area if any programs are assigned to it. You must first remove the program from the program area, and then remove the program area.

To link a program to a plan

Once you have created a plan, you can link existing programs to it. When you link a program to a plan, all the plan participants receive an e-mail message informing them of the link.

1. Navigate to the plan to which you want to link a program.
2. Click the **Manage Linked Objects** icon ( ) and select **Link Existing**.

   The **Link Existing Programs to Plan** window appears.

3. Enter a string in the **Find by name or code** field and click **Find** or leave the field empty and click **Find**

   The **Search Results** field shows only programs which you can link to the plan. Only programs with the same budget granularity and security policy as the plan will be available. Programs with a status of Cancelled, Deleted, or Completed never appear in **Search Results**.

4. In the **Select a Program Area** field select a program area. The program will belong to the program area that you choose.
5. In the **Search Results** field, click the programs to link to the plan.

   To select more than one program at a time, press the **Ctrl** key and click each program.

6. Click the right-pointing arrows. The **Selected Items to link** field populates with your selections.

   To deselect a program, click the program in the **Selected Items to link** field and click the left-pointing arrows.

7. Click **Save Changes**.

The program appears in the **Supporting Program(s)** field on the Plan Summary tab.

Linked programs appear with summary information on the Plan Summary tab in the **Supporting Programs** field. Click the program name to be taken to the Summary tab for that program.

Security considerations for linking plans and programs

Linked programs and plans must have the same security policy. Once you link a program to a plan, you cannot change the security policy of either object without first removing the program from the plan.

In order to link an existing program to the plan, you must have **Edit Summary Tab** permission on each program you want to link. If you do not have this permission, ask your administrator for help.

Adding a new program from a plan

You can create a new program when you are in a plan; IBM Unica Marketing Operations links the new program to the plan. The program areas you choose in the program creation process are the program areas currently defined for the plan.

After you click the **Add Program** icon () on the plan summary page, the process is similar to creating a new, non-linked program.

Linked programs

If you add a program from the plan summary page, the new program’s program area is constrained by the plan’s program areas.

- If the plan from which you add a program contains more than one program area, you will be asked to choose the program area to which you would like the new program to belong.
- If the plan contains only one program area, the new program will default to that program area.
- If you want to re-assign a different program area to a linked program, you must first remove that program from the plan, then link the program to the other program area.

Non-linked programs

If you add a program that is not linked to a plan, you can assign it to any program area.

Related Topics

- To add a program

To remove a program from a plan

Before you can delete a plan, you must remove any programs linked to it. Removing the link does not delete the program from IBM Unica Marketing Operations, it simply breaks the link.

1. Navigate to the **Summary** tab of the plan from which to remove a linked program.
2. Click the **Manage Linked Objects** icon () and select **Remove**.

   The **Remove Program Links From Plan** window appears.
3. Select the program you want to remove from the **Linked Program(s)** field.
4. Click the right-pointing arrows button to move the program into the **Selected Items to Remove** field.

   To move the program back to the **Linked Program(s)** field, click the program in the **Selected Items to Remove** field and click the left-pointing arrows.
5. Click **Save Changes**.

To start a plan

Once you start a plan, all participants can work on the plan.

1. Navigate to the **Summary** tab of the plan that you would like to start.
2. Click the **Status** icon () and select > **Start Plan**.

   A window appears in which you can add comments or additional information about the plan.
3. Click **Continue**.

The plan Summary tab displays. The status is set to **In Progress**.

To delete a plan

You can delete a plan from the Plan List page or from the plan Summary tab.

You cannot delete a plan if it has linked programs. You must first remove the link to the program before deleting the plan.

The following procedure describes how to delete a plan from the Plan List page.

1. Click **Operations > Plans**.

   By default the **Active Plans** view of the Plan List page appears.
2. Select the checkbox next to each plan that you want to delete.

3. Click the **Delete this Item** icon ().
4. When IBM Unica Marketing Operations prompts you to verify that you want to delete the plans, click **OK**.

Related Topics

- To remove a program from a plan

4 Programs

About programs

If you have permission to create programs, you can add a new program. As part of adding a new program, you select a template set up by an IBM Unica Marketing Operations administrator.

Once you create a program, you can start the program at any time. Starting the program makes it active and changes the status of the program to **In Progress**.

Program views

IBM Unica Marketing Operations organizes programs in views.

- **All Programs** lists all programs. It also contains links to the **Active Programs** and **My Programs** views.
- **Active Programs** lists all the programs that are now in the **In Progress** state. This is the default view.
- **My Programs** lists all the programs that you own or are part of as a team member.

You can also access the different views of programs using the **Actions** menu. It contains links to the views listed above. In any view, you can change the sort order by clicking on the column you want to sort by. Click the column a second time to reverse the sort order.

Additionally, you can search for a program.

Summary information for programs

On the program Summary tab, IBM Unica Marketing Operations lists summary information about a program, such as status, security policy, and so on. By default, you are taken to the program's Summary tab when you select a program from the Program List page. Any projects linked to the program are listed on the Summary tab as well.

From the Summary tab, you can also perform tasks such as changing program status, adding a request, editing the program, linking an existing project, or removing a linked project.

Supporting projects and requests

At the bottom of the Summary tab, the **Supporting Projects and Requests** section displays information about all child projects for the program. This list shows the name of the project, the name of the project owners, the project ID, the date and time when the last person updated the project, the target start and end dates of the project, and the project status.

To add a program

When adding a program, note the following

- To add a program you must have permission to add a program.
- If you add a program, you are the owner of the program.
- You can add other team members, some of whom can also be program owners.

1. Click **Operations > Programs**.
2. Click the **Add Program** icon ().
3. Select the appropriate template for your program.

   Your administrator sets up templates that correspond the types of programs that fit your organization's needs. For more information on templates, see the *IBM Unica Marketing Operations Administrator's Guide*.
4. Click **Continue**.

   On the Summary page of the program wizard you can click the **Add/Remove Members** button to add team members to the program. You can add members as either owners or participants in the program. For details, see About Team Alerts.
5. Fill in the fields and continue clicking **Next** and filling out the required fields until you reach the Attachments page. The required fields have a double asterisk (**) next to them.

   The number and content of your program pages differ depending on the template you use. A typical program contains program summary information, perhaps some additional information pages, and attachments of documents related to the program.

To start a program

You can start any program you created, or any program for which you are listed as an owner. Additionally, a user may have permission to change the status of **all** programs. These permissions are assigned based on a user's role in the program's security policy.

1. Navigate to the **Summary** tab of the program you want to start.
2. Click the **Status** icon () and select **Start Program**.

   A dialog box appears.
3. Add any comments in the dialog box, then click Close to start the program.

The program's status changes to **In Progress**.

To add new project requests and projects to programs

After you create a program, you can create a new project request or project from within the program. This automatically links the project request or new project to the program.

Once you add a new project request or a new project to a program, you cannot change the security policy of the project request, project, or program. You must remove the item from the program to change the security policy.

1. Navigate to the **Summary** tab of the program that you want to contain the new project request or project.
2. Click the **Manage Linked Objects** icon () and select **Add Request** if you want to create a project request or **Add Project** if you want create a new project.

   The wizard for adding a project request or adding a project opens
3. Do one of the following.
   - Follow the steps in Requesting a project to add project request and associate it with this program. Once a user accepts the request, the project created from this project request is also part of this program.
   - Follow the steps in Adding a project to add a new project and associate it with this program.

   When you complete the steps, the project request or project is open to the Summary tab. The Summary tab has a field called **Parent Items and Code**. This field contains a link to the program of which the project is a part.
4. Click the link to open the program.

   Scroll to the bottom of the Summary tab of the program to view a list of all the projects contained in the program.

Related Topics

- About programs
- To remove projects from programs

To link an existing project to a program

Before you can link an existing project to a program, there must be existing projects in your system and you must have the appropriate permission.

After you create a program, you can link existing projects to the program. When you link a project to a program, all the team members listed in both the project and the program receive an e-mail message informing them of the link.

1. Navigate to the **Summary** tab of the program that you want to link to an existing project.
2. Click the **Manage Linked Objects** icon ( ) and select **Link Existing**.

   A dialog box appears, where you specify projects to link.
3. Enter search criteria in the **Find by name or code** field.
4. Click **Find**.

   The **Search Results** field displays only projects which you can link to the program. Only projects with the same budget granularity and security policy as the program will be available. Programs with a status of Cancelled, Deleted, or Completed never appear in **Search Results**.

5. In the **Search Results** field, select the projects to link.
6. Use the **>>** and **<<** buttons to move projects into or out of the **Selected Items to Link** list box.
7. Click **Save Changes** to create child links to the projects you selected.

The projects you added appear in the list of projects at the bottom of the Summary tab of the program.

Security considerations for linking projects and programs

Linked projects and programs must have the same security policy. Once you link a project to a program, you cannot change the security policy of either object without first removing the project from the program.

In order to add projects to the program, you must have **Edit Summary Tab** permission for each project you want to add. If you do not have this permission for one or more projects, ask your administrator for help.

Related Topics

- To remove projects from programs

To navigate from a program to a plan

You can link the programs you create to a plan. A plan may contain several programs and helps organize programs in logical groups.Once you link a program to a plan, you can navigate to the plan from within that program.

1. Navigate to a program that has a parent plan.

   The Summary tab has a field called **Parent Items and Code**. This field contains a link to the plan that the program is part of.

2. Click the link to open the plan. The Summary tab of the plan appears. Scroll to the bottom of the Summary tab of the plan to view a list of all the programs contained in the plan.
3. Click the name of the program you were just in to go back to that program.

To remove projects from programs

You can remove new project requests, new projects, and existing projects from a program.

1. Navigate to the **Summary** tab of the program that contains the project you want to remove.
2. Click the **Manage Linked Objects** icon () and select **Remove**.

   The Remove Project Links From Program window appears.

3. In the **Linked Project/Request** list box, select the project requests or projects to remove.
4. Use the arrow button to move selected items to the **Selected Items to Remove** list box.
5. Click **Save Changes**.

The project requests and projects no longer appear in the list on the Summary tab of the program.

To delete a program

When you delete a program, IBM Unica Marketing Operations checks to see if the program contains links to any projects. If so, you cannot delete the program until you remove all linked projects.

1. Select **Operations > Programs**.
2. Select the checkbox next to each program to delete.
3. Click the **Delete this Item** icon ().

The selected programs are deleted from the system.

You can also delete a program when you have the program open, from any of the program's tabs, by clicking the **Delete this Item** icon () in the IBM Unica Marketing Operations toolbar.

5 Projects

About Projects

A **project** contains all the information related to developing and executing one or more related marketing deliverables or initiatives. This information can include a checklist or schedule of tasks that people working on the project must perform in order to prepare and produce the deliverables for the project.

For example, you might use a project called **Monthly Tradeshow** to collect all the information needed for the one tradeshow each month that your organization attends. This information could include who attends the show, what equipment you need in the booth, copies of demos of the product that you intend to present, collateral you want to hand out to customers, costs of promotional materials, and any additional information that pertains to the tradeshow.

Projects can have subprojects. A **subproject** has all the same characteristics as a project. A subproject is linked to a parent project; any project linked in this manner is referred to as a subproject.

Related Topics

- Projects
- Project requests
- Creating projects and requests
- Team projects and requests

About campaign projects

If your IBM Unica Marketing Operations system is integrated with IBM Unica Campaign, you can create campaign projects.

A campaign project collects the information related to developing a marketing campaign and executing it through Campaign.

A campaign project can contain any features available to projects, including subprojects. Campaign projects also contain a TCS tab with a Target Cell Spreadsheet and an additional Campaign Summary section of the Summary tab.

In a campaign project, you synchronize the project's campaign, offer, contact history, and response history data with Campaign.

About project codes and campaign codes

When you create a campaign project, you must specify a project name and code. The same name and code are used as the campaign name and code when you click the **Create Linked Campaign** icon to create the campaign in IBM Unica Campaign.

The code must be unique in both IBM Unica Marketing Operations and IBM Unica Campaign. The system checks the uniqueness of the code before creating the project or saving the project if you have changed the code.

Creating projects and requests

You can create either a project or a project request.

- If you have permission to create projects, you can add a new project by selecting a project template set up by your administrator. You select this template from a list of available templates. A project is one instance of a template. For example, you would not use one project to capture information about more than one tradeshow.

- If you do not have permission to create a project, you can instead create a project request by selecting the type of project you want to request from a list of available templates. Project requests allow you to get formal approval of a proposed project, or allow for acceptance of a work request.

  For example, people within the marketing department or outside vendors that do not have permission to create projects can create project requests that ask someone with the permission to create projects, to create a specific project. Specifically, a marketing manager may submit a project request to the CMO to have the request formally approved, or a sales account manager may submit a project request to the marketing services department requesting development and production of some specialized collateral.

After you create a project request, you submit it to an authorized individual, and when they accept the request, IBM Unica Marketing Operations creates a project.

You can also create a project request or a project from within a program.

Once you create a project, you can start the project at any time. Starting the project makes it active and you can view it in different views in IBM Unica Marketing Operations. When you create a project you become the owner of that project.

Related Topics

- About programs

Reconciliation

Projects can be in a temporary state, **In Reconciliation**. A user can re-activate a completed or cancelled project, update project information, then change the state back to its previous state (completed or cancelled). For example, the owner of a project can make private changes to a cancelled project.

While a project is in this state, it is not available to any other participants for editing. The project is read-only for users not having reactivate rights.

The spirit of reconciliation is that one can do anything within the project but nothing externally. That is, for the rest of the IBM Unica Marketing Operations system, the project is not available. For example, while in reconciliation, you cannot reassign tasks.

Related Topics

- To reconcile a project
- To change the status of a process

Request statuses

The following table describes the possible statuses for requests.

Status	Description
Draft	Indicates the request has been created, but not yet submitted.
Submitted	Indicates the request has been submitted to the proper person who can accept or reject the request.
Returned	Indicates the person who reviewed the request has returned it to the submitter, either for rework or some other deficiency.
Accepted	Indicates the request has been accepted. Once this occurs, IBM Unica Marketing Operations creates a corresponding project. This indicates the end of the life cycle for the request.

Project views

IBM Unica Marketing Operations organizes projects and project requests in views as follows.

View	Description
All Projects and Requests	Lists all projects and requests. It also contains links to the other project views and any saved project searches.
Active Projects and Requests	Lists any active projects or project requests. A project is active when it is in the **In Progress** state and a request is active when it is in the **Submitted** state. This is the default view.
My Projects	Lists all the projects that you own or are part of as a team member.
My Requests	Lists all the requests where you are either the requestor or the recipient.
Completed Projects	Lists all projects with a status of Completed.
This Week's Projects and Requests	All projects and requests that fall within the current week.
Next Week's Projects and Requests	All projects and requests that fall within next week.
This Month's Projects and Requests	All projects and requests that fall within the current month.
Next Month's Projects and Requests	All projects and requests that fall within next month.

View	Description
All My Teams Projects	All projects assigned to a team to which you belong.
All My Teams Project Requests	All project requests assigned to a team to which you belong.
All My Teams Unassigned Project Requests	Lists all project requests assigned to a team to which you belong but not assigned to a team member.

Choosing list or calendar view

You can view projects in a project list view or a calendar view. By default, IBM Unica Marketing Operations displays projects in a list view when you select **Projects** from the **Operations** menu.

View	Description
List view	Displays all the projects listed alphabetically in ascending order. You can change the order by clicking once on the **Name/Owner** column. If you want to sort by any of the other columns, click that column. Click the column a second time to change the order of the column from ascending to descending.
Calendar view	Displays a calendar view of projects, listing any projects taking place and their dates of activity.

To select project views

You can access the different views of projects using the **Actions** menu. In any view, you can change the sort order by clicking on the column you want to sort by. Click the column a second time to reverse the sort order.

1. Open Marketing Operations and select **Operations > Projects**.

   The default page that appears is the **Active projects and Requests** view. You can change this default page by modifying your user options.

2. Click the **Actions** icon ( ) and select **All Projects and Requests** or **My Requests** or **My Projects** to view all projects, only project requests that pertain to you, or only projects that pertain to you.

3. Click the **Actions** icon ( ) and select **Search for Projects** to search for projects meeting a specified criteria. You can then save that search.

Related Topics

- Project views
- To set your project options
- To perform an advanced search (except for assets)

Searching for projects

You can search for projects grouped by any criteria that is useful to you and save the results of that search for later viewing. For example, you might search for all projects that started in June and then save the results of that search by naming it June Searches. You could also search for all projects of a certain type, such as all tradeshow projects, and save that search. You can then access those search results at any time.

Related Topics

- To perform an advanced search (except for assets)

Team projects and requests

Users can submit requests to a team, rather than an individual. Such requests are referred to as team requests. When someone accepts a team request, the resulting project is referred to as a team project.

Related Topics

- Team projects lifecycle
- To reassign a team project

Team projects lifecycle

The following table describes the life cycle of team requests and projects.

The following steps are somewhat dependent upon the routing model used for the particular team involved in the request.

	User action	System action
1	A user submits a request to a team.	• Creates a team request. • Populates the My Team Routing field for the request. • Sets the status of the request to Submitted.

	User action	System action
2a	A team manager or member returns the request.	• Changes the status of the request to Returned. • Clears the My Team Routing field for the request.
2b	A team manager assigns the request to a team member.	• Sets the owner of the team project to the team member selected during the assignment.
2c	A team member accepts or returns the request.	• Sets the owner of the team project to the team member selected during the assignment.
3a	If accepted, the owner of the team project sees it through to completion.	Updates the status for the team project as applicable.
3b	If the owner becomes unavailable, a team manager or member can reassign the project.	• Sets the owner of the team project to the newly-assigned team member. • Updates the My Team Routing field for the project.

To reassign a team project

A team project can be reassigned, for example if the team member responsible for the project goes on vacation or otherwise becomes unavailable.

1. Navigate to the Projects list page by selecting **Operations > Projects**.

   The **Active Projects and Requests** view appears. If the project you wish to reassign does not display, click **All Projects and Requests**.

2. Select the team projects to reassign by checking the box next to each project.
3. Click **Reassign Team Projects**.

   A dialog box appears. Note that you can only reassign team projects for which you have the proper authorization (via team membership and routing options).

4. In the **Assign to** field for each project, select the user to whom the project should belong (this user becomes the owner of the project).
5. Optionally, enter comments into the **Comments** text box.
6. Click the **Reassign Project(s)** button to complete the reassignments, or click **Cancel** to close the dialog box without changing any project ownerships.

To respond to team requests as a team manager

When someone submits a request to a team on which you are the manager, you may be required to assign a team member to the request. The assigned team member becomes the owner of the resulting project.

1. Select **Operations > Projects**.
2. Respond to team requests in either of the following ways:

   - Select a single project and click the **Assign Team Request** icon ().
   - Click the **Actions** icon () and select **All my teams project requests**. From this view you can respond to one or multiple project requests by selecting the requests you want to assign and clicking the **Assign Team Request** icon ().

   Note that you can respond only to team requests for which you have the proper authorization (via team membership and routing options).
3. In the dialog box, assign the request or requests to the appropriate team members.
4. Optionally, enter comments into the **Comments** text box.

To add a project

When adding a project, note the following.

- To add a project, you must have the proper security permission.
- If you add a project, you are the owner of the project.
- You can add other team members (some of whom can also be project owners).
- You may also add a project in response to a project request.

1. Select **Operations** > **Projects**.
2. Click the **Add a Project** icon ().
3. Select a template for your project.

   A IBM Unica Marketing Operations administrator sets up templates that correspond to the types of projects that fit your organization’s needs. You must select a template configured as a campaign project template to access any of the IBM Unica Marketing Operations and IBM Unica Campaign integration features.
4. Click **Continue**.
5. Fill in the fields in the wizard and continue clicking **Next** and filling out the required fields until you reach the Attachments screen.

You can click **Finish** on any of the wizard pages; IBM Unica Marketing Operations automatically saves all default values for non-mandatory attributes in the remaining steps. You can also click **Save and Duplicate** on any of the wizard pages; Marketing Operations automatically the current project with default values for non-mandatory attributes in the remaining steps, and you then see the Summary tab of a new project with data already populated.

6. Do one of the following.
    - Click **Finish** to save the project. The project Summary tab is displayed.
    - If you need to create another project that is similar to the one you have just created, click **Save and Duplicate**. The current project is saved, and you then see the Summary tab of a new project, with data already populated. You should change the default name, and then you can edit the new project as needed.
7. Do one of the following if you want your project or projects to be active.
    - If you created a single project, click the **Status** icon ( ) and select **Start**.
    - If you created multiple projects, click the **Actions** icon ( ), select **All Projects and Requests** to see your draft projects, and start them.

The tabs in a project differ depending on the template you used. A typical project contains project summary information, strategy, workflow, including a schedule of tasks and deliverables, tracking of expenses and resources, and attachments of documents related to the project. When IBM Unica Campaign is integrated with Marketing Operations, a campaign project also contains a Target Cell Spreadsheet tab.

To start a project

You can start any project you own.

- A project you or someone in your organization created.
- A project created when you or someone in your organization accepted a project request.

Once you start a project, all project participants can work with their assigned tasks.

1. Navigate to the Summary tab of the project you would like to start.
2. Click the **Status** icon ( ) and select **Start**.

Related Topics

- To add a project
- To add a request

Projects attachment tab

The **Project Attachments** tab is broken into two sections, one for the project's attachments, and one attachments for tasks that belong to the project.

Column	Description
Icon, file name	Icon of the file and file name that links to the file. The file type and file size are listed in brackets.
Description	This column displays the name of the person who added the file, timestamp when added and the description for the file.
Task	This column is for the **Task Attachments** section of the page only. Displays a link to the parent task of this attachment
Actions	This column contains the following links: • **Send as Mail Attachment**: Click to send this attachment via email. • **Remove**: A user having privileges to remove the attachment can delete the attachment using this link. The task owner would receive an alert of the attachment being removed. This attachment would no longer be available from the task attachment tab.

Project requests

A **project request** is similar to a work order, or creative brief. It represents a request for someone else to do work according to the requester's specifications.

There may be times when users within an organization or outside vendors would like to request a project. For example, as an outside vendor, you may submit a project request to the marketing services organization requesting some collateral. The marketing services representative accepts the request and creates a project, organizing and assigning resources to the project in order to manage the creation of the collateral.

If you request a project, you are a *requestor*. You then submit the request to a *recipient* for approval. Once the recipient accepts the request, the recipient owns the project and is called the *owner*.

A project request does not contain a workflow. Once the request is approved and transitions to a project, it contains the appropriate workflow.

To request a project

When adding a project request, note the following.

- To request a project you must add the request and then submit it.
- To add a request you must have the proper security permission.

- If you request a project, you are a requestor. You then submit the request to a recipient for approval. Once the recipient accepts the request, the recipient owns the project and is called the owner.

Related Topics

- To add a request
- To submit a request

To add a request

Adding a request is the first step in requesting a project. After you add the request you must submit it.

Your request pages differ depending on the template you use. A typical request can contain the following sections:

- Summary information about the request
- Tracking information
- Attachments that are part of the request.

1. Select **Operations** > **Projects**.
2. Click the **Add Request** icon ().
3. Select a template for your request.

   Your administrator sets up project templates that correspond to the types of projects that fit the needs of your organization. You must select a template configured as a campaign project template to create a project that uses any of the IBM Unica Marketing Operations and IBM Unica Campaign integration features.
4. Click **Continue**.
5. Fill in the fields in the wizard and continue clicking **Next** and filling out the required fields until you complete your request, then click **Finish**.

   Note the following.

   - You configure the request recipients in the wizard. Depending on the template you chose, some of the recipients may already have been set up. Also, depending on your permissions and the way the template was set up, you may or may not be able to change the recipients, their roles, sequence order, and how long they have to respond (duration).
   - Recipients may be assigned a sequence number that determines the order in which they receive and must approve the request.
   - Recipients may be assigned a duration that determines how long they have to respond.
6. When you have finished configuring your request, do one of the following.

   - Click **Finish** to save the request. The request Summary tab is displayed.

- If you need to create another request that is similar to the one you have just created, click **Save and Duplicate**. The current request is saved, and you then see the Summary page of a new request, with data already populated. You should change the default name, and then you can edit the new request as needed.

7. Do one of the following if you want your request or requests to be active.

   - If you created a single request, click the **Status** icon ( ) and select **Submit**.
   - If you created multiple requests, submit them as described in To change the status of projects and requests.

When the last required recipient approves the request, IBM Unica Marketing Operations creates the project.

Related Topics

- To submit a request

To submit a request

To submit a request, you must first add the request. You then submit the request to the request recipient(s). If the request is accepted, then one of the recipients becomes the owner of the project.

1. Add a request.
2. If recipients have not been pre-selected, add one or more recipient steps and assign a User or Team to the recipient step.
3. On the **Summary** tab, click the **Status** icon ( ) and select **Submit**.
4. Enter any comments that you want the recipient to view regarding the request.
5. Click **Continue**.

The recipients whose turn it is to receive notification are notified of your request and the status of the request changes to submitted. The recipients appear in the **Recipient** section of the request's **Summary** tab.

Related Topics

- To add a request

To monitor the status of a project request

You can view the following information about project request recipients.

- Role
- User assigned to the role
- The sequence number assigned to the recipient

- The status of the recipient's response (Not yet notified, Waiting, Accepted, or Returned)
- Any comments the recipients have added (click the **User comments link**)

1. Select **Operations > Projects**.

   The Active Projects and Requests page appears.

2. Click the project request you want to monitor.

   The project request's Summary page appears, with information about the recipients and the status of their responses.

To re-draft or cancel a request

You can re-draft a request before it has been accepted or if it has been returned by a required recipient. To re-draft or cancel a request, do one of the following.

- To add or change information, click the **Status** icon () and select **Re-draft**.

  While you re-draft the request, the recipient cannot respond to the original request. If you need to change recipients, select **Edit**.

- To cancel the request, click the **Status** icon () and select **Cancel**.

When you re-draft or cancel a request, you can add comments indicating the reason for the re-draft or the cancellation.

If you re-submit a request, recipients are notified of the re-submission according to the re-approval rule selected when the request was created. If the re-approval rule allows you to select recipients, and if you have not changed recipients when re-drafting the request, when you re-submit the request you can select from a list of required recipients who have accepted the request. If the recipients have been assigned sequence numbers, recipients are notified in sequence.

To respond to a request as an individual

When someone creates a request for a project and names you as the recipient of the request you receive an alert message in the My Alerts page and an e-mail message notifying you of the request.

1. Navigate to a request by selecting **Operations > Projects**.

   The **Active Projects and Requests** view appears. If the request you wish to accept is not in the list, click **All Projects and Requests**.

2. Click the request to open it.
3. Review the request and decide whether you want to accept it or return it to the submitter.
4. Enter any comments in the **Comments** field and click **Accept** or **Return**.

5. If you are accepting a team request, in the **Assign to** field, select the user to whom the resulting project will be assigned.
6. Click the **Actions** icon ( ) and select **All Projects and Requests**:

- If you accepted, both the accepted request and the not yet started project appear in the list. You are the owner of the not yet started project.
- If you returned the request, Marketing Operations notifies the requestor. The request's status changes to **Returned**.
- If the request is returned, the requestor has options to resubmit or cancel the project request.

To copy a project or request

You can copy a project or request when it is in any state. You can copy a project request before or after you submit it. You may want to copy a project or request if you want to create another project or request that is very similar to an existing one. You can make a copy of the existing project or request and modify it.

1. Navigate to the **Summary** tab of the project or request you want to copy.
2. Click the Copy icon ( ).

   The **Copy to** dialog box opens.
3. You can optionally also copy the parent program or project link:
   - Select **Copy parent program link** to copy the parent program link.
   - Select **Copy parent project link** to copy the parent project link.
4. Click **OK**.

   The copy of the project or request opens to the **Summary** tab. The copy appears as **Copy of** <original project name>. For a project, its status is **Not Started**; for a request, its status is **Draft**.
5. Modify any information you want to change in the copy and click **Save Changes**.

The copy appears in your **All Projects and Requests** view and your **My Projects** or **My Requests** view.

To navigate from a project to a program

You can link a project to a program. Programs help you organize projects in logical groups. Once you link a project to a program you can navigate to the program from within that project.

1. Open the **All Projects and Requests** view (by selecting **Operations > Projects** and clicking **All Projects and Requests** in the breadcrumb).

2. Click a project to open it.

   The **Summary** tab has a field called **Parent Items and Code**. This field contains links to the ancestors of the project (its container program and plan).

3. Click the link to open the program.

   The **Summary** tab of the program appears. Scroll to the bottom of the **Summary** tab of the program to view a list of all the projects contained in the program.

4. Click the name of the project you were just in to go back to that project.

Related Topics

• To link an existing project to a program

Linking projects

Marketing projects often involve people from outside the marketing department, making it difficult to track everything from within a single, comprehensive project.

For example, work for a tradeshow might involve the following types of work, each a project in its own right.

- Identify and sign up individuals to attend, present, cover the booth, and so forth.
- Produce marketing collateral.
- Design, build, and test a demo.
- Set up training sessions and/or speaking engagements.
- Generate the customer invitation list, create the invitation, send the invitation, track the responses, and so forth.
- Create and maintain the tradeshow web page(s).

Many of these individual projects are tracked and managed within the respective departments, but this never truly gives the coordinator a full view of whether the tradeshow will occur on time and without problems.

A project coordinator can create all of the necessary individual projects, assign owners to each, and then create child links from the tradeshow project to each of the subprojects. This provides the project coordinator with a single view in to the entire project.

You can organize projects by creating parent/children relationships between them.

No data is exchanged between parent and children projects; the relationship is for organizational purposes only.

Subprojects overview

From a project’s summary page, you can manage subprojects using the following menu items that display when you click the **Manage Linked Objects** icon () .

- **Add Project**: to create a new child project.
- **Add Request**: to create a new child request.
- **Link Existing**: to create a child link to one or more existing projects or requests.
- **Remove**: to remove existing links to one or more child projects or requests.

Note the following.

- Security policies must be the same for parent and child projects.
- A project’s summary page contains an area showing the links to all of its direct children.
- A project can have a child/parent relationship with either another project or a program, but not both. That is, if a project is linked to a program, it cannot be linked to a parent project.
- Once you add a subproject, you cannot change the security policy of the parent or child project; you must first remove the link.

Details on the project/subproject relationship

The project-to-subproject relationship has the following characteristics.

- Any existing project or request (having the same security policy) can be linked to another project (requests can only be children, not parents).
- A project can have at most one parent project or program, but not both.
- A project can have an unlimited number of children projects.
- A project can have both a parent and children; this makes it possible to have an n-level deep hierarchy for projects.
- You cannot delete a project that is linked to either a parent or child; you must first remove all parent/child (and project/program) relationships before you can delete a project.
- When copying a project that is either linked as child or parent, the new project is not linked.
- Metrics, budgets, and workflow do not roll up from a child project to a parent project.

To create a child project/request

1. Navigate to the **Summary** tab of the parent project.

2. Click the **Manage Linked Objects** icon () and select **Add Project** or **Add Request**.

   These options are available only if you have the appropriate security permissions.

3. Choose a template for the a new subproject or request.

   The wizard for adding a project request or adding a project appears.

4. Complete the wizard.

   - The owner and security policy fields default to the values for the parent project. The owner of the new subproject is the user completing these steps; so the owner of the child project may be different from the owner of the parent.
   - If you use the **Save and Duplicate** button to create multiple projects or requests, they are linked to the same parent.

When you complete the wizard, the project request or project is open to the **Summary** tab. The **Summary** tab has a field called **Parent Items and Code**. This field contains links to the ancestors of the project.

To link a child project or request to a project

1. Navigate to the Summary tab of the parent project.

2. Click the **Manage Linked Objects** icon () and select **Link Existing**. Note this link only appears enabled if you have the appropriate security permission.

   A dialog box appears, where you specify project(s) to link.

3. Enter search criteria in the **Find by name or code** field.

4. Click **Find**.

   IBM Unica Marketing Operations displays search results of only those projects and requests that have the same security policy and budget granularity as the project. For example, if your project uses the global security policy, only projects and requests that also use the global security policy appear after a search. Additionally, projects with a status of **Cancelled**, **Deleted**, or **Completed** never appear in your search results.

5. In the **Search Results** field, select the project(s)/request(s) to link as children.

6. Use the **>>** and **<<** buttons to move projects/requests into or out of the **Selected Items to Link** list box.

7. Click **Save Changes** to create child links to the project(s) or request(s) you selected.

Security considerations for linking projects

Linked projects and sub-projects must have the same security policy. Once you link a project to another project, you cannot change the security policy of either object without first removing the relationship.

In order to link, add, or remove parent/child projects (and requests), you need to have the appropriate security permission. If you do not have the appropriate permission for the task you attempt, ask your administrator for help.

To remove a parent-child project link

You can remove N-level deep child relationships using this procedure. That is, you can remove “grandchild” and “great-grandchild” relationships, and so on.

1. Navigate to the **Summary** tab of the parent project.
2. Click the **Manage Linked Objects** icon () and select **Remove**.

   A dialog box appears, where you specify project(s)/request(s) to remove.

   The list contains children from all levels; that is all children, direct and indirect, appear on the list.

3. In the **Linked Project**... field, select the project(s) to remove as children.
4. Use the **>>** and **<<** buttons to move projects into or out of the **Selected Items to Remove** list box.
5. Click **Save Changes** to remove child links to the project(s) you selected.

The project requests and projects no longer appear in the list on the **Summary** tab of the project.

Removing the link does not remove or delete the project; it simply removes the relationship.

To assign work

Once a project exists, users can assign work (tasks) to people or teams.

1. Navigate to a project.
2. Add people and teams to the project. To assign work to an individual or team, they must be members (or reviewers) of the project.
3. Assign tasks in any of the following ways:
   - Use the **Assign Work By Role** icon () on the **People** tab of the project to assign all tasks based on user roles.

- Use the **Find And Replace Task Members** icon ( ) or the **Find and Replace Task Reviewers** icon ( ) on the **People** tab to reassign work for certain people or teams.
- Use the **Workflow** tab to individually assign tasks to users and or teams.
- Use the **Members/Roles** icon ( ) on the **People** tab of the project to assign a team.

When users login, they can act on the work (tasks) that have been assigned to them.

Related Topics

- To assign work by role
- Finding and replacing task members or reviewers

Selecting projects or requests

When you select checkboxes on the Projects list page, IBM Unica Marketing Operations retains your selections during a session, as follows.

- In View mode, your checkbox selections are retained until you navigate to a list page for a different object. For example, if you make a selection on page 1 of a multi-page project list, go to page 2, and then return to page 1, either by clicking the page number at the bottom of the page or using the **Recent** menu, your selections are retrained. However, they are discarded if you navigate to the Tasks page.
- If you edit a project by clicking the **Edit a Tab** icon on the list page, your selections are retained if you click **Save and Return to List**.

To change the status of projects and requests

You can change the status of one or more projects or requests. Your change must meet the following prerequisites; if it does not, you will see a warning message that describes the possible problems.

- The new status must be a valid transition from the existing status.
- You must have appropriate permissions to make the change. If you are accepting or rejecting a project request, you must be an appropriate approver.

Your administrator can set up IBM Unica Marketing Operations to send an alert to owners and members of a process when its status changes.

1. On the Projects and Requests list page, select the checkbox next to each item whose status you want to change.

Note that, although you can select items across multiple pages, your changes are applied only for the selected items on the page you are viewing when you select the new status.

2. Click the **Status** icon () and select the desired status. A dialog box appears in which you can add comments.
3. Enter any comments, and click **Continue** to close the dialog box and apply the new status.

To reconcile a project

After you complete (or cancel) a project, you can edit certain portions of the project by placing it into a temporary state, **In Reconciliation**.

1. Navigate to the **Summary** tab of a cancelled or completed project.
2. Click the **Status** icon () and select **Reconcile**.

   A dialog box appears in which you can add comments.
3. Click **Continue** to close the dialog box.

The status of the project is set to **In Reconciliation**.

To delete a project

When you delete a project, IBM Unica Marketing Operations checks to see if you linked the project to a program. If you did, you cannot delete the project until you remove it from the program.

1. Open IBM Unica Marketing and select **Operations > Projects**.

   By default the **Active Projects and Requests** page appears.
2. Select the checkbox next to each project you want to delete.
3. Click the **Delete this Item** icon ().

Related Topics

- To remove projects from programs

6 Workflows

About workflows

When you create a new project , you use the **Workflow** tab to customize the workflow provided by the project's template. When you participate in a project , you use the **Workflow** tab to keep track of your work. If you have the appropriate permissions, you can save a workflow as a workflow template.

Any member of the project can edit any column of the **Workflow** tab as long as he or she has the appropriate access permission.

The workflow tab has an edit mode and three view modes.

- To edit the workflow displayed on the tab, click the Edit icon ().
- You can view the workflow as a spreadsheet, a timeline, or a process flowchart.

Related Topics

- About the workflow spreadsheet view
- About the workflow timeline view
- About the workflow process flowchart view

Workflow concepts

Workflows contain Approvals and Tasks.

Tasks

Tasks are steps in the workflow where a user must take an action. The task is not complete until the action is complete.

Tasks have several types of data associated with them, described below.

Stages

You can group workflow tasks under headings called stages. Stages can help you with task organization. For example, you can create a stage that has all tasks performed by your specific users. Stages are the headings in bold that group the tasks together.

Dates

Workflows contain the following types of dates.

- **Actual/Forecast dates** are dates a task owner plans on starting and completing a task. These dates are specified while the task is still pending. When a member starts and completes a tasks, he or she can specify the same dates or different actual dates (the real dates that they started and completed the task).
- **Target dates** are dates used to plan the project schedule. Typically, they are set at the beginning of the project.
- **Anchored dates** are fixed dates that cannot change, even if the dates of the tasks upon which they are dependent change.
- **Non-work time** are dates when people do not work so the system skips those dates when calculating durations for tasks. Marketing Operations currently supports system-wide non-work time that applies to all tasks. It is up to the project manager to determine whether overriding any of these dates is necessary. System administrators enter and maintain these dates.
- **Weekend dates** are dates you use to specify work that occurs on a weekend on a per-task basis. You can schedule work on a weekend date using the Schedule Through option for each task.

Effort

The work effort in days (as opposed to duration) that it takes a user to complete a task. For example, the task may have taken three calendar days to complete, but the task owner only spent half a day on the task for each of the three days, so the effort is one and a half days.

Locked tasks

When you edit a task, the task is locked so no other user can edit it at the same time. Additionally, when someone creates an approval from an approval task, the approval task becomes locked permanently.

If anyone attempts to edit a locked task, they receive a warning message, indicating that it is currently in use.

People and roles

You can assign tasks to individual team members or you can assign tasks to all team members in a given role. When you assign a task to one or more team members, they are considered to be the task owner.

Workflows use the following concepts to identify the people who perform work.

- **Task owners** are the people responsible for executing or managing tasks. For approval tasks, these members become the owners of the approval.
- **Reviewers** are reviewers of approval tasks. These members become the approvers of the approval.
- **Roles** are used as a bridge between tasks and people. They are useful for assigning work on a generic basis. For example, each type of project you create can have its own workflow template, and the template can contain standard roles for certain tasks. Then when you create a project, some (or all) of the tasks have a default role already associated with them.

About My Tasks

IBM Unica Marketing Operations allows users to view the list of tasks assigned to them. We refer to this list as **My Tasks**, since each user gets a customized view when selecting **Operations > Tasks**.

The My Tasks list enables you to see all tasks to which you are assigned, allowing you to view tasks across multiple projects. This feature consolidates the information that you would otherwise retrieve by navigating individually to each of your projects, clicking on its workflow tab, and searching for all tasks to which you are assigned.

From this screen, you can perform the following actions.

- Get a summary view of all your tasks and approvals.
- Mark selected tasks as completed or skipped.
- Navigate to a task's Workflow tab.
- Update task properties.
- Search or filter the task list by criteria you choose.

Related Topics

• Filtering My Tasks

Filtering My Tasks

By default, the My Tasks page displays all of your tasks, for all projects and requests.You can filter the list of tasks displayed by clicking the **Actions** icon ( ) at the top of the page.

This table describes the available filters.

Filter	Description
All My Teams tasks	Lists the tasks assigned to all teams of which you are a member.
All My Teams Unassigned Tasks	Lists the tasks that are assigned to a team of which you are a member but that are not yet assigned to an individual.
All Tasks	Lists all tasks in the system.
My Active Tasks	Lists your assigned tasks for all projects that are currently active (started but not yet completed).
My Completed Tasks	Lists tasks assigned to you that are marked as completed.
My Future Milestones	Lists tasks where all the following criteria are met. • The task has a milestone flag specified. • The task must be assigned to you. • The task is not completed or skipped.
My Milestones	Lists all milestones in tasks that are assigned to you.
My Recent Tasks	Lists all upcoming and in-progress tasks meeting the following criteria. • The task must be assigned to you. • The task has not been completed or skipped. • The task must have a start or end date that falls within the past 14 days.
My Pending Approvals	Lists all the approvals waiting for your response. It includes any approvals that are waiting for your approval that you have not responded to already.
My Tasks	Lists all assigned tasks. This is the default view when you select **Operations > Tasks**.
My Upcoming Tasks	Lists tasks assigned to you that are scheduled to end within the next 14 days.

About the task pane

When you click on a task in the **My Tasks** page, the task pane opens on the right and the task's parent object opens on the left. The task pane provides shortcuts to many IBM Unica Marketing Operations functionalities, context for the task you are working on, and tools that allow you to move directly through the workflow.

Depending on the parent object you are working on and permissions, you may be able to do the following tasks by clicking on links in the task pane.

- Edit the project's tabs
- Add Attachments
- Read and post messages
- Manage team members and reviewers
- Find and replace task owners
- Edit the workflow
- Edit budget allocations and line items
- Edit Tracking
- Add a child object or request
- Link an existing program, project, or request to the parent object

The task pane also provides context while you work by showing the next task in the workflow (that you have permission to see) on the bottom of the task pane. If you do not have permission to edit it, the task is in view mode. You can also record effort time and write hand-off comments.

The following tools allow you to move through multiple tasks and approvals directly on the task pane.

- Save the task to work on later by clicking **Save for Later**
- Mark the task complete by clicking **Finish**
- Skip the task by clicking **Skip**

About schedules

There are two options for scheduling in workflows.

- Baseline
- Up-to-date

Baseline scheduling

You use baseline scheduling when you want to compare an actual schedule to a fixed target schedule. With baseline scheduling, you never change the target schedule, allowing it to serve as a baseline. Users who are assigned tasks receive reminders on the forecast/actual dates.

Up-to-date scheduling

You use up-to-date scheduling when you want to establish the schedule as the official schedule that is updated regularly. This mode enables project managers to capture the most up-to-date, official schedule; however, it does not provide easily for viewing a baseline version of the schedule.

To use a baseline schedule

Before creating your projects, have the system administrator set up permissions and reminders as follows.

- Set permissions so that only project owners can update **Target** dates.
- Set reminders (Alerts) based on the **Forecast/Actual** dates.

While working with a baseline schedule, team members perform the following high-level steps.

1. The owner sets the initial **Target Start** and **End** dates for each task.

   These dates stay fixed throughout the entire project .
2. As the project progresses, team members update the **Forecast/Actual** dates with real data.

To keep an up-to-date schedule

Before creating your projects, have your system administrator set up permissions and reminders as follows.

- Set permissions so that only project owners can update Target dates.
- Set reminders (Alerts) based on the Target dates.
- Set reminders to be sent only to the owner or owners.
- Optionally, set reminders on the Forecast/Actual dates to be sent to team members.

While working with an up-to-date schedule, team members perform the following high-level steps.

1. The owner sets the initial Target Start and End dates for each task.
2. As the project progresses, team members update the Forecast/Actual dates with real data.
3. Once a task is delayed (the owner receives reminders based on Target dates), the owner assesses the situation and adjusts the Target dates and durations as necessary.

About date rippling

When you enter or change the date for a task, Marketing Operations can calculate other dates based on your entry. It uses an internal algorithm to bi-directionally calculate the dates of dependencies, starting with the cell where you entered the date.

When you recalculate dates on a workflow, note the following.

- In addition to factoring in non-work days and hours, date calculations use two additional system-wide properties: start time of day and, number of hours per day. Your system administrator configures these parameters.
- If a task row is anchored, date rippling does not update its dates (even if the date columns are empty).
- Date rippling does not affect active and finished tasks; only tasks with a status of Pending.
- Date rippling observes the per-task options for non-work time. That is, the date rippling algorithm takes into account whether or not a task is scheduled to progress during non-work time and/or weekends.
- Do not log forecast times outside of business hours if you intend to do date rippling or other automatic calculations afterwards, because that information will be overwritten.

To automatically calculate workflow dates

When you enter or change the date of a task, Marketing Operations can calculate other dates based on your entry.

1. Enter or change the date for a task in any of the date fields.
2. Select the date and click anywhere on the screen except for another date field.

   The Ripple icon () appears next to the end date.
3. Click the Ripple icon.

   Alternatively, you can select one of the toolbar icons for recalculating dependency dates.

The other dates in the workflow change, based on the new entry.

Related Topics

- Workflow toolbar
- To ripple dates above a locked task

To ripple dates above a locked task

If a workflow has a locked task, and you change the date of a task that is located above the locked task, you receive a warning when you attempt to ripple dates.

To clarify this task, the steps below assume the following:

- Task 1.8 is locked.
- You need to change the duration of task 1.5 from 5 days to 10 days.
- All tasks are dependent on the previous task.

1. Open the workflow for editing, and change the duration on task 1.5 from 5 days to 10 days.
2. Click the ripple icon next to the end date of task 1.5.

   The system displays a warning message, saying you cannot ripple through the locked row.
3. Click the start date of task 1.8
4. Click the ripple icon ( ).

The system calculates the dates below the locked task.

Workflow links

The **Workflow** tab displays the following links.

Link	Description
Breadcrumbs	Click any active link in the breadcrumbs trail to go to that page. Breadcrumbs (a list of pages you visited prior to arriving at the current page) are located above the project name.
Edit	Click the icon to add, remove, or make changes to workflow stages and tasks.
View as spreadsheet	Click the icon to view the workflow as a spreadsheet. This view provides access to granular information about a task, presented in table format. For example, you can easily look up a task's status, duration, forecasted end date, and team members using the column headers. This is the default view.
View as timeline	Click the icon to view the workflow as a timeline. This view provides a graphic view of information such as task duration and status. From the Project Timeline drop-down menu, select various options such as Dates/Progress to show this information on the timeline.
View as process flow-chart	Click the icon to view the workflow as a process flowchart. This view shows the workflow tasks as a network diagram.
Layout	Click the icon to open a dialog for adding and removing columns from the spreadsheet view.

<table>
<tr><th>Link</th><th>Description</th></tr>
<tr><td>Save as template</td><td>Click to save the workflow definition directly into the template library (if you have the permission to do so).

A dialog is presented to allow you to name the template. For more details, see the Marketing Operations Administrator’s Guide.</td></tr>
<tr><td>Tasks and stages</td><td>In the spreadsheet view, tasks are links that behave as follows:
Clicking an approval tasks pops up the summary page for the approval in a new window.
Clicking a workflow task pops up the Post Task Update dialog in a new window.</td></tr>
</table>

Related Topics

- To edit the the default workflow
- About the workflow spreadsheet view
- About the workflow timeline view
- Workflow tab layout page
- Post task update dialog box

About the workflow spreadsheet view

When you display the workflow as a spreadsheet (the default), the workflow displays the information about the stages and tasks in your workflow as a list in a spreadsheet. You use this view to update task status, add reviewers, and changes dates, among other tasks.

Related Topics

- Workflow tab fields
- Workflow toolbar

Workflow tab fields

When the workflow appears in spreadsheet view (the default view), it includes the following fields and columns.

Field	Description
Tasks and stages	Lists the task stages and tasks that comprise the project . When in edit mode, click a stage or task to revise or change. When in view mode: • Clicking an approval task opens the approval's summary page in a new window. • Clicking a workflow task opens the **Post Task Update** screen in a new window.
Status	The status of the task. Approval tasks can have one of the following statuses. • Not started • In Progress • On hold • Completed • Canceled People tasks can have one of the following statuses. • Pending • Active • Skipped • Finished When an approval task has a status of In Progress, On hold, or Completed, this field is read-only. When an approval task has a status of Not started, in edit mode you can change the status to In progress or Canceled.
% Complete	The percentage value that represents how complete a task is. When in edit mode, click the measuring bar for a task (but not for an approval task, which determines progress in a different way) and enter a number. The measuring bar expands to a comparable level. For approval tasks, this field is read-only.
Forecast/Actual Start	For tasks in the pending state, this field represents the Forecast Start date. Forecast Start dates are in italicized font. After you change a task from Pending to Active, this field represents the Actual Start date. Actual Start dates are in regular font. In edit mode, use the pop-up calendar to select a date and time.
Forecast/End	For tasks in the pending state, this field represents the Forecast End date. Forecast End dates are in italicized font. After you change a task from Active to Finished, this field represents the Actual End date. Actual End dates are in regular font. In edit mode, use the pop-up calendar to select a date and time.

Field	Description
Forecast/Dur.	The duration of the task, in days, hours, and minutes. If you enter both start and end dates, the system automatically calculates a value for this field (the Forecast/End date minus the Forecast/Actual Start date).
Actual Effort	The actual effort it took to complete the task, as opposed to calendar duration. Effort is measured in days, hours, and minutes.
Anchored Dates	Indicates whether the task is anchored. If a lock appears in this field, the task's dates are anchored. To specify a fixed date for a task, click the column, then select **Anchored** from the pull down menu. The task date cannot move even if the dates of the tasks it is dependent on change. If a dependency is not met, the dates in conflict appear with a different icon and in a different font. For example, suppose task 2.2 is dependent on task 2.1. If the target end date of task 2.1 is after the target start date of task 2.2, both the target end date of 2.1 and the target start date of 2.2 appear in red, if you anchored the date for task 2.2 by selecting the lock icon in the **Anchored Dates** column.
Schedule Through	Indicators for which dates to use when determining task dates. The following options are available. • **Business**: indicates this task includes only standard, non-holiday, non-weekend dates. This is the default for all tasks. • **Weekends**: indicates this task includes weekends. The system includes weekends when it calculates dates for this task. • **Off.**: indicates this task includes system-wide non-work time that has been defined. The system takes into account these times when it calculates dates for this task. • **All**: indicates this task includes all dates. No dates are ignored when dates are calculated for this task.
Target Start	The targeted start date of the task. In edit mode, use the pop-up calendar to select a date.
Target End	The targeted end date of the task. In edit mode, use the pop-up calendar to select a date.
Target Dur.	The actual duration of the task, in days, hours, and minutes. The Target End minus the Target Start dates.
Target Effort	The targeted effort estimated to complete the task, as opposed to calendar duration.

Field	Description
Milestone Type	A task milestone that you choose from a drop-down list. Example options might be Meeting, Event, and Job Start. Plan administrators set the milestone types that appear on the list. For more information on setting up milestones, see the *Marketing Operations Installation Guide*.
Member Role(s)	A role or roles associated with the task. These can be loaded automatically from the project template used to create the project, or the project owner can set them up manually. When an approval task has a status of In Progress, On hold, or Completed, this field is read-only.
Members	The people associated with the task. If a workflow task has a role in its **Member Role(s)** column, when you assign people to roles, the workflow automatically adds a person in the corresponding **Members** column. You can also add people to the Members column manually, while editing the workflow. When you edit the workflow for an approval task, teams are not listed in this field because a team cannot be the owner of the approval task. Typically, standard tasks have members. When an approval task has a status of In Progress, On hold, or Completed, this field is read-only.
Reviewer Role(s)	A read-only field that shows the role or roles associated with an approval task. These can be loaded automatically from the project template used to create the project, or the project owner can set them up manually. Reviewer roles are used to pre-populate an approval process.
Reviewers	A read-only field that shows the reviewers associated with an approval task. Reviewers are used to pre-populate an approval process. If a workflow task has a role in its **Reviewer Role(s)** column, when you assign people to roles, the workflow automatically adds a person in the corresponding **Reviewer** column.
Enforce Dep.	If this task is dependent on other tasks, determines how strictly the system interprets dependencies. When this option is selected, the system restricts project members from updating this task until the tasks it depends on are finished.
Required	Whether or not this is a required task. Required tasks cannot be skipped or deleted and their names cannot be changed.

Field	Description
Task Code	A read-only code that identifies each task uniquely within a project. System integrators use this code to implement custom business logic involving tasks.
Notes	Any comments about the task.

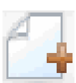
Related Topics

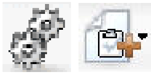
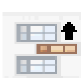
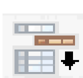
- Updating and finishing tasks
- Scheduling work time

Workflow toolbar

When the Workflow tab is in edit view, a toolbar appears. You use the buttons on the toolbar to make changes to the workflow. For example, you can insert and delete tasks, add a stage, clear all entries, and so on.

The following table explains each button.

Icon	Description
	**Add Task Row.** Adds a new people task in the spreadsheet.
	**Add Approval Row**. Adds a new approval task in the spreadsheet.
	Click a dependency option • No dependencies • In series • In parallel This option determines how IBM Unica Marketing Operations behaves when adding new tasks.
	**Add Stage Row**. Adds a new stage in the spreadsheet. Tasks are grouped in stages.

Icon	Description
	The Tools menu contains the following choices. • **Copy:** copies the contents of the selected cells to the clipboard. • **Paste:** pastes the contents of the clipboard, beginning at the selected cell. • **Paste Rows After:** pastes the contents of the clipboard below the selected row. • **Mark as...:** marks the selected task appropriately. For example, selecting **Mark as Finished** changes the status of the selected task to Finished. You can mark the task Skipped, Finished, Active, or Pending. • **Fill Down/Up:** copies a cell's values to a range of cells. • **Clear:** erases all entries in the selected cell or group of cells. • **Clear Column:** erases all entries in the selected column. The date columns have dependents as follows: if you select Clear Column to erase the Target Start, the Target End column is also erased and vice versa. If you select Clear Column to erase the Forecast/Actual Start, the Forecast/Actual End column is also erased and vice versa. • **Clear All:** erases all entries in the workflow.
	Click to recalculate dependent dates while preserving slack time. Recalculates all date dependencies based on your changes; leaves any existing slack time between dependent tasks.
	Click to recalculate dependent dates while removing slack time. Recalculates all date dependencies based on your changes; removes any slack time between dependent tasks.
	Click to undo your last change.
	Click to reapply a change you undid with the Undo action.
	**Move row up**. Click to move the selected task or stage upward. If you move a stage, the associated tasks move with it.
	**Move row down**. Click to move the selected task or stage downward. If you move a stage, the associated tasks move with it.
	Delete row. Click to delete the selected task or stage. Note the following. • If you delete a stage, all of its associated tasks move up one stage. • If you delete the first stage, the first task associated with it becomes the stage for the rest of the tasks.

Related Topics

- To create an approval process for a workflow approval task
- Managing task dependencies
- To copy tasks in Internet Explorer
- To fill data into a range of cells

To set first column width on workflow spreadsheet

You can change the width of the first column in the workflow spreadsheet view, and keep this setting for your entire session. That is, your changes remain after you navigate to other pages and subsequently return to this tab.

1. Navigate to the **Workflow** tab of the project.
2. Use the column width control to resize the first column to your preferred width.
3. Click the **Layout** link in the top right section of the screen.
4. In the **Project Workflow Tab Layout** dialog, do the following:
    a. In the **First Column Width** section, select the **Remember Last Setting** radio button.
    b. At the bottom of the dialog, check the **Make these the default settings for this project's workflow tab** box.
5. Click **Apply and Close** to save your changes and close the dialog.

The first column width is now set for this project, for the remainder of your session; no matter which pages you navigate to, when you navigate back to this workflow tab, the first column width remains as you set it.

About the workflow timeline view

The timeline view of the workflow tab presents a view of the project over a period of weeks or months. To view the project schedule in a timeline view, click the `View as Timeline` icon.

You can customize the timeline view by using the `Layout` link from the workflow tab. Use this dialog box for the following purposes.

- Select the captions, if any, to appear next to each bar in timeline.
- Choose a weekly or monthly view of the timeline.
- Select the types of dates to view.

If you click the **Edit** link from the timeline view, the spreadsheet opens for editing.

About the workflow process flowchart view

The process flowchart view shows displays the tasks in a network diagram style, as follows.

- Each task is displayed as a box with a task number and ID.
- Tasks that have dependencies are connected to any tasks they depend on.
- Sequential tasks are displayed on the same line.
- Parallel task are displayed on different lines.
- Independent/orphan tasks are displayed on their own line, with no connections.

Workflow tab layout page

Use this page to set the appearance for both the spreadsheet and timeline views of a workflow tab.

To hide the Spreadsheet Layout or Timeline Layout section, click the icon next to the title. To view a hidden section, click the icon.

Spreadsheet layout section

Field	Description
Columns	Check a column to display, or uncheck to hide.
Preset Column groups	Click a link to select one of a preset group of columns to display. • **All**: default setting; all boxes checked (all columns displayed) • **Targets**: hides Status, % complete, and Actual date columns. • **Actuals**: hides Target Dates/Effort and Member/Reviewer roles columns. • **All dates**: displays all columns related to target and actual dates. • **Responsibility**: displays columns related to who is assigned to complete the tasks.
First Column Width	Select one of the radio buttons. • **Remember Last Setting**: When viewing the workflow spreadsheet, you may adjust the first column width to see more or less of the task names. • **Exactly**: Select this button and enter a number to set the column to an exact width in pixels.

Timeline layout section

Field	Description
Time Scale	The increment of time used for measurement. Select either **Weeks** or **Months**. The default setting is Weeks.
Bars Represent	The bars in the timeline view indicate durations. You can choose to display either Forecast/Actual dates, Target dates, or both. The default is to display both.
Bar Captions	By default, the bars do not have captions. Select one of the choices from the drop down menu to display certain information as bar captions. For example, you can have the task name or milestone type display as a caption.
First Column Width	See the First Column Width description for in the Spreadsheet Layout section above.

Buttons

Button	Description
Make these the default	Check this box to keep your settings as the default for the workflow. This ensures that whenever you navigate away from and back to this tab, your display setting will not change (until the next time you make changes and check this box). These are the defaults for **all** users, for this workflow, until someone changes the defaults.
Apply and Close	Click to apply your changes and close the dialog.
Apply	Click to apply your changes. Your changes display on the workflow, and the dialog remains open for further editing.
Restore Defaults	Restores all settings to their default values, undoing any customizations you have made.
Cancel	Click to close the dialog without changing any settings.

Related Topics

- To set first column width on workflow spreadsheet

Scheduling work time

Plan offers the following settings to help effectively manage and allocate resources.

- Specify non-work time: allows your organization to define a set of dates that, by default, are not included when the system calculates dates for a task.

- Include weekends in work time: by default, weekends are not included when calculating task dates and durations. However, you can override the default to schedule certain tasks through weekends.

Note that by default, tasks **do not** include weekends nor non-work dates when calculating their start or end dates.

To view a list of defined non-work dates, click **Non-working Business Days** from the Administration page.

When viewing the IBM Unica Marketing Operations calendar, any day that has been specified as non-work time is indicated by a gray X in the background (or by a gray-shaded column in the timeline view). Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.

Related Topics

- About non-work time
- About including weekends

About non-work time

If there are days where no work is typically done by employees, you can set these dates as non-work time in IBM Unica Marketing Operations. Marketing Operations supports a set of system-wide non-work time, separated into user-defined types.

For example, assume you have the following non-work dates set in Marketing Operations.

Category	Dates
Corporate Holiday	1/1/2006, 7/4/2006, 12/25/2006
State Holiday	4/15/2006, 10/3/2006
Corporate Off-site	8/15/2006

After you define a set of non-work time, you can elect whether or not to schedule work on these days, for each project and its tasks.

If the active time for a task includes any non-work time, its end date is pushed out by an extra day for each of these dates. For example, assume 7/4/2006 is defined as non-work time. If Task 1.3 is scheduled to start on 7/3/2006, and has a duration of 3 days, its end date is 7/7/2006; work is not scheduled for 7/4, since it is defined as non-work time.

For any task, you can choose to ignore the non-work time; if so, the workflow includes any non-work time as normal work days. So, if you choose to ignore non-work time for Task 1.3, its end date becomes 7/6/2006.

About including weekends

For certain tasks, you might need to schedule work to proceed on weekends. For example, print shops often work 24 hours a day, 7 days a week, so if you have tasks that go to a print shop, you can have these tasks take into account weekend days.

For example, suppose you have a task called “Print Brochures at print shop.” This task might start on Friday 6/15, and have a duration of 3 days. If you choose to include weekends for this task, its end date is end of business Monday, 6/18. If you choose not to include weekends for the task, it ends on end of business Wednesday, 6/20.

Work and non-work time settings

By using the **Schedule Through** indicator on the workflow, you have many options for scheduling tasks. You can schedule tasks in any of the following manners.

Flags	Behavior
Bus. (Business)	Non-work time and weekends are excluded from task scheduling. This is the default setting for all tasks.
Wkd. (Weekends)	The task is scheduled to include weekends, but not system-wide non-work time.
Off. (Days off)	Weekends are excluded from task scheduling, but work is expected to be done during other non-work time.
All (All calendar days)	The task is scheduled to include all days.

The Schedule Through column is a planning and targeting tool; it should not be altered once actual dates and times have been logged on a task. Doing so may overwrite the actual dates and times.

To edit the the default workflow

When you create a new project, the system guides you through a wizard based on the template you selected. When you finish with the wizard forms, you might need to customize the default workflow provided by the project's template. The ability to customize default workflows is controlled by your user permissions.

When you open the Workflow tab in edit mode, if any of the toolbar buttons are disabled or the values in the columns are read-only, it means that you do not have the appropriate security permissions to edit the workflow.

1. Open the project that has a workflow to set up and open the Workflow tab.

   This tab displays the workflow as designed in the template.

2. Click the Edit icon ().
3. Edit the names listed in the first column to change the default task and stage names to specific tasks and stages.

   Stages are the headings in bold that group the tasks together.
4. Add any stages or tasks, as necessary.
   - Click the Add a Stage Row icon () to add a stage.
   - Click the Add Task Row icon to add a standard task.
   - Click the Add Approval Row icon to add an approval task.
5. Enter target or forecast actual dates, depending on how you want to use the schedule.
   - You can enter start dates, end dates, and duration for a task. Enter any two, the third value is calculated automatically. For example, if you enter a target start and a target end date, the system calculates the duration.
   - You are not prevented from picking any dates that are not in agreement with the per-task options for non-work-time. For example, even if a task is not scheduled to include weekends, you can still pick a Sunday as an end-date for the task.
6. To specify that a task is a milestone of some sort, for example, a drop date, select the **Milestone Type** column and select a milestone that appears in the drop-down list.

   Your administrator can set the milestones that appear in the list.
7. Select members or roles to assign the task to in the **Members** and **Reviewers** columns .
8. Enter any notes about the task in the **Notes** section.
9. Perform one of the following actions.
   - Click **Save** to save your changes and remain in edit mode. If you are making extensive edits, it is a best practice to click **Save** occasionally to prevent any loss of work.
   - Click **Save and Finish** to save your changes and return to view mode.
   - Click **Cancel** to undo any changes and return to view mode.

Related Topics

- To add a stage or task
- About team alerts
- About schedules

About adding a stage or task

To add a task or stage to a workflow, your security role must grant you the permission named **Add/Edit/Delete Tasks/Approvals, Dependencies and Targets** for the template you select. If the **Add** button is missing from the toolbar, contact your administrator about obtaining the appropriate access rights.

Note the following about stage and task rows.

- When adding a stage or task, if you place the number of the task in front of the task name, the task is inserted in the place that the number indicates.

  For example, if you enter `2.3 Have team meeting` anywhere in the task list, the task is placed under the task labeled 2.2 and the numbers of subsequent tasks shifts, so that the step previously labeled 2.3 is now 2.4.

- You can add a stage or task anywhere in the list and then use the up and down icons on toolbar to move the stage or task to the appropriate place in the list.
- There are several options for managing dependencies on tasks as new rows are added and existing rows are removed.
- After you create an approval from a workflow task, you can only edit the approval itself; you cannot edit the corresponding task in the workflow.

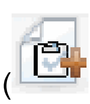
  If you try to edit the approval from its workflow task, you receive an error stating the task row is locked. You must navigate to the approval to update any of its fields.

Related Topics

- Managing task dependencies

To add a stage or task

Before adding a stage or task, open a workflow in edit mode.

1. In the workflow, select the stage or task above the place to insert the new stage or task.
2. Add a stage, approval task, or standard task.
   - Click the Add Stage Row icon () to add a stage.
   - Click the Add Task Row icon () to add a standard task.
   - Click the Add Approval Row icon () to add an approval task.
3. Optionally, to make a task dependent on another task, enter the number of the task it is dependent on after the task in parentheses ( ).

For example, suppose task is named `Deliver draft to vendor`. To make this task dependent upon task 1.3, name the task `2.5 Deliver draft to vendor (1.3)`.

4. When you have finished editing the workflow, save your changes.

The stage or task is added to the workflow, after the insertion point.

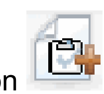
If the date of one task changes, it changes the dates of all the dependent tasks. For example, if task 2.2 Setup Milestone Schedule is dependent on task `2.1 Kickoff Meeting w/Creative Team`, enter `(2.1)` after you enter, `Setup Milestone Schedule`.

If a task has more than one dependency, separate the task numbers with commas. For example, use `2.2 Setup Milestone Schedule (1.1, 2.1)`.

To add a stage or task below a locked task

Before adding a stage or task, open a workflow in edit mode.

If you select a locked task, the insert task/stage links do not work. To add a task directly below a locked task, you must perform the following steps.

1. Navigate to the workflow page to change and click **Edit**.
2. Select any task row that is not locked.
3. Add a stage, standard task, or approval task.
   - To add a stage, click the Add Stage Row icon .
   - To add a standard task, click the Add Task Row icon .
   - To add an approval task, click the Add Approval Row icon .
4. Change the number of the task or stage so that it directly follows the locked task it should follow.

   For example, suppose the locked task is `2.5 Review copy - informal (2.3)`. You would set the number of the new task to `2.6`. Once you finish naming the task, the system moves it so it is after task 2.5.

To create an approval process for a workflow approval task

From the spreadsheet view of a workflow, you have the option of adding an approval process to a particular task. A task with an approval process attached to it has the approval icon () in the **Linked Step** field.

1. Navigate to the Workflow tab of the project that contains the approval task.

2. Still in view mode, click the name of an approval task. The Start Approval dialog appears as a popup.
3. Complete the details for the approval.
4. Click one of the following to complete the process.
    - **Send Approval**: saves the approval and submits it (changing the status from **Not Started** to **In Progress**).
    - **Save for Later**: saves the approval process and sets the status to **Not Started**.
    - **Cancel**: discards the changes you have made in the dialog, and does not create a new approval.

The dialog closes and the system displays the workflow tab where you initiated the approval process.

After you create an approval from a workflow task, you can only edit the approval itself; you cannot edit the corresponding task in the workflow.

Related Topics

- To skip an approval task
- New/edit approval page

About editing a stage or task

If you change the number for a task or stage, the task is inserted before the row matching the new number.

For example, assume the stage order as shown here.

1. Planning
2. Collateral Design
3. Lead Generation
4. Show Setup-to-Breakdown
5. Marketing Review

If you edit task 5, Marketing Review, changing its number to `3`, the new order is as follows.

1. Planning
2. Collateral Design
3. Marketing Review
4. Lead Generation
5. Show Setup-to-Breakdown

Now suppose you edit task 2, Collateral Design, changing its number to `4`. The new order is the following.

1. Planning
2. Marketing Review
3. Collateral Design
4. Lead Generation
5. Show Setup-to-Breakdown

To move a task or stage to the end, give it any number higher than the final task or stage. For example, to move stage 2, Marketing Review to the end, change its number to `6` or higher.

Updating and finishing tasks

When you create a task, or open a new workflow with existing tasks, the status of the task or tasks is **Pending**. As project members work on tasks, they update the status to indicate the current progress.

To place a task into any status, ensure the workflow is in edit mode, and click the **Status** column of the task, then choose the appropriate status from the drop-down list

Status	Description
Pending	Indicates a task has not yet started. When you create a task, it defaults to the pending state. The pending state is symbolized by a blank status field.
Active	Indicates a task is in progress. Symbolized by the icon. You can also type `A` to place a task in the active state
Skipped	Indicates a task has been skipped. Symbolized by the icon. Skipped tasks are tasks for which members no longer do work. Any dependencies of this task are also disregarded. You can also type `S` to place a task in the skipped state.
Finished	Indicates a task has been completed. Symbolized by the icon. You can also type `F` to place a task in the finished state.

Note the following behavior.

- If you enter `100` in the **% Complete** column for a task, the status is updated to **Finished**.
- If you enter `0` in the **% Complete** column for a task (if it was previously finished), the status is updated to **Pending**.
- If you enter any number from 1 to 99 in the **% Complete** column for a task (if it was previously finished), the status is updated to **Active**.

- If you mark the status for a task as **Skipped**, all of the dates for the task are cleared. Until you hit **Save** (or **Save and Finish**), you can retrieve the dates by canceling out of the editing session. However, once you save the spreadsheet with the dates cleared, you cannot retrieve them.

Approval tasks

Once you create an approval task, you cannot change its status from the workflow tab. The status of an approval task is automatically set depending on the status of the approval itself.

To skip an approval task

This topic describes how to skip an approval process from a task on the Workflow tab.

1. Navigate to the Workflow tab of the project that contains the approval to skip.
2. Click the name of the approval task to skip. The Approval dialog appears as a popup.
3. Click **Status** > **Cancel Review**.
4. Close the dialog.

The approval task is crossed out and can no longer be accessed. If necessary, you can also delete the approval.

Related Topics

• To delete an approval

To skip multiple tasks

You can perform this task when you have been assigned tasks for one or more projects.

1. Open the Tasks list page to view all of your assigned tasks.
2. Select the checkbox for each task to skip.
3. Click **Skip Selected**.
4. In the confirmation dialog box, click **OK** to skip the selected tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected and skipped are removed from the Tasks list page, and their status is changed to Skipped.

To complete multiple tasks

You have been assigned tasks for one or more projects.

1. Open the Tasks list page to view all of your assigned tasks.

2. Select the checkbox for each task you wish to complete.
3. Click **Complete Selected**.
4. In the Complete Selected Tasks dialog box, select one of the radio buttons:
    - **Leave all dates as they are**. The tasks are marked as complete, but no end dates are modified.
    - **Set all actual end dates to now**. Each selected task is marked complete, and its actual end date field is set to the current date and time.
5. Click **Continue** to complete the selected task or tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected are removed from the Tasks list page, and their status is changed to Complete. Additionally, their end dates are set, if you selected that option.

To add an attachment to a task

To add attachments for a task, a project owner must enable adding attachments for the task. The following users can add or remove task attachments.

- Task owners only can add attachments to their tasks.
- Task owners and users with the **Delete Attachment** security permission for projects can delete task attachments.

Adding attachments to tasks is similar to adding attachments to other objects (such as programs). However, note the following behavior that is specific for adding attachments to tasks.

- You cannot use markup on task attachments
- There is no versioning for task attachments: uploading a new version overwrites the existing version of the attachment.
- It is possible to have multiple task attachments with the same name for the same task. This can occur if multiple owners of the task each upload a file with the same name. You can differentiate the files by the the user who created the attachment.
- You can add and remove attachments no matter the state of the task. That is, even if a task is marked complete or skipped, you can still add and remove attachments.
- The Attachments tab for projects is divided into two sections: one for files attached to the project's tasks, and one for files attached directly to the project.
- If a task owner adds task attachments, and later the project owner sets the **Enable Task Attachment** flag to false, nobody would be able to add or remove attachments from the Post Task Update dialog. However, task attachments for the project could still be removed from the project attachment tab.

1. Navigate to the task to which you would like to add an attachment.

    Click the task from a project workflow or from the Tasks list page.

    The Post Task Update dialog box opens.

2. Click the **Attachments** tab.

   The tab displays any attachments that already exist for the task.

3. In the **File to Attach** field, select From **My Computer** , **From the Asset Library**, or **URL**.

4. Do one of the following:

   - Click **Browse** to attach on your computer. When the dialog box appears, navigate to the file you want to attach, and click **Open**.
   - Click **Browse Library** to attach a file in an asset library. Click the library that contains the file you want to add and use the tree in the left pane of the screen to navigate to the folder and then the asset that you want to attach. Click **Accept Asset** when viewing the asset in the right pane.
   - Enter the URL in the field provided.

5. Add any comments about the attachment.

6. Click **Add More** to display an additional set of fields for each additional attachment you want to add.

7. After you have added all your attachments, click **Save and Return** to close the dialog box.

Any new attachments are added to the **Attachments** tab for the task.

Related Topics

- To add an attachment to an object

To add roles to tasks

Normally, when you create a project, the workflow automatically contains member and reviewer roles for all tasks if the template selected contains this information.

However, you may occasionally need to assign roles to workflow tasks that differ from the template settings.

1. Navigate to the Workflow tab of your project.

2. Click Edit ( ).

3. Select the **Member Role** cell for the task you wish to assign.

4. Click the turndown icon ( ) to expand the list of available roles, and select the one to assign to this task. Repeat this step until you have assigned all the tasks.

   If you have permission to **View people tab** and **Edit team members and roles**, then all system users, system teams, and member roles are available in the **Members** and **Member Roles** dropdowns even if they were not previously included on the people tab; adding a new user to the project workflow will automatically add the user to the people tab.

By contrast, **Reviewer** and **Reviewer Role** cannot be edited directly on the workflow spreadsheet. Add new reviewers and reviewer roles on the Approval popup.

5. Save your work.

Related Topics

- To add a role

About roles, people, and approval tasks

You can assign order to roles when you add them to an approval task in a workflow. This order is saved if you save the workflow as a template.

When you add people to the roles and then assign work, the spreadsheet lists the people alphabetically by their name. When you create an approval from the task, the reviewers are ordered according to their role order. However, in the **To** field of the approval, they are still listed in alphabetical order. If more than one user is in a role, those users are sorted alphabetically by their name.

Related Topics

- Example ordering of reviewers for an approval task

Example ordering of reviewers for an approval task

Assume your workflow has approval task **1.5 Review printed Brochure**. For reviewer roles, you have added the roles in the following order.

1. Legal reviewer
2. Marketing manager
3. Content reviewer

If you save this workflow as a template, and then later create a project using this template, this order is preserved.

Now assume you assign people to roles as follows.

1. **Legal reviewer**: Nancy Chan
2. **Marketing manager**: Brian Doyle, Andy Proctor
3. **Content reviewer**: Elaine Jones, Mark Davis, Brad Johnson, Wilson Alverez

When you click task 1.5 and create the corresponding approval, the reviewers are listed in the following order, alphabetically within their role

1. Nancy Chan
2. Andy Proctor
3. Brian Doyle

4. Brad Johnson
5. Elaine Jones
6. Mark Davis
7. Wilson Alverez

To list the reviewers in a different order, move them up and down within the approval.

Related Topics

• About roles, people, and approval tasks

About copying and pasting tasks

When copying and pasting tasks, note the following.

- For copying, you must select a continuous range of tasks, rather than selecting multiple, disconnected tasks (by using Ctrl+click).
- If you do not insert enough blank tasks to correspond to the ones you are copying, existing tasks are overwritten.
- To paste rows at the insertion point, you can click **Paste** from the **Tools** menu or press Ctrl+V. To paste rows after the selected row, you must click **Paste Rows After** from the **Tools** menu.
- You can copy the status from one approval task and paste it in another approval task status column (but not in a people task status column).
- If you copy the status from one approval and paste it in a new row of an approval that is not saved, the Not started status is pasted, regardless of what you copied.

To copy tasks on Macintosh/Safari

Copying and pasting tasks on a Safari browser is slightly different than the procedure described for Internet Explorer. The following procedures describe the steps involved.

When selecting multiple task rows on the Macintosh using the Shift key, it may be difficult to determine which rows are selected by their appearance. Take extra care to make sure you know which rows you have selected.

1. Select and copy tasks.
   a. Select the task, tasks, or the block of cells to copy.
   b. Select **Copy** from the **Tools** menu or press Ctrl+C. A "Text To Copy" dialog appears, with the information from your selection already highlighted.
   c. Press Apple+C to copy all text in the dialog to your clipboard.
   d. Click `Continue` to close the dialog.

You can now paste the information to another application or to another area on your spreadsheet.

2. Paste selected tasks.
   a. Copy information from another application or from another area on your spreadsheet.
   b. In Plan, select the destination row, rows, or block of cells in the workflow.
   c. Select **Paste** from the **Tools** menu or press Ctrl+V. A "Text To Paste" dialog appears, containing an empty text box.
   d. Press Apple+V to paste your clipboard information in to the text box.
   e. Click **Continue** to paste that information into the spreadsheet at your previous selection location.

To copy tasks in Internet Explorer

You can copy a continuous group of tasks to another place in the same workflow or into the workflow for another project.

1. Open the project that has the tasks to copy and click the **Workflow** tab.
2. Click **Edit**.
3. Select the first source task. If this is the only task you are copying, skip to step 5.
4. Mouse over the final source task, then Shift-click over this task. A range of tasks you selected is highlighted.
5. From the workflow toolbar, select **Copy** from the **Tools** menu item to copy the selected task or tasks.

   If you are pasting the tasks into the same workflow, skip to step 7.
6. If you are copying the tasks to another project workflow, navigate to the destination workflow tab, and open it for editing (click its **Edit** link).
7. Optionally, insert enough blank rows below the destination to act as placeholders for the tasks you are copying.

   For example, if you are copying 6 tasks, make sure there are 6 blank rows available. If you do not create the necessary rows, existing tasks below the insertion point are overwritten.
8. Click the destination task.
9. From the workflow toolbar, select **Paste** from the **Tools** menu item to paste the task.

The source tasks are placed in the workflow, starting from the selected destination task.

Related Topics

- To add a stage or task

To fill data into a range of cells

You can copy a value in one or more cells to a group of continuous cells above or below the selected cells. This can greatly reduce the data entry time for adding duplicate information. For example, assume you have a workflow that contains ten consecutive tasks all having the same target start. target emd. target duration, and target effort.

You can fill in this data for the first task, then copy the values to all the other tasks, by selecting these four columns for all ten tasks and using **Fill Down**.

1. Open the project that has the task values to duplicate, and click the **Workflow** tab.
2. Click the Edit icon ( ).
3. Select the first cell.
4. Mouse over the final cell, then Shift-click over this cell.

   A range of cells you selected is highlighted.

   You must select a continuous range of cells, rather than selecting multiple, disconnected cells.

5. Click the Tools icon ( ), and select **Fill Down** or **Fill Up**.
   - **Fill Down** copies the values in the top-most cell (or cells) to all the other selected cells, including the bottom-most.
   - **Fill Up** copies the values in the bottom-most cell (or cells) to all the other selected cells, including the top-most.

All the selected cells now contain the same value.

Remember to save the workflow to keep your changes.

To print the Workflow tab

You can print all information found on your project **Workflow** tab, or select certain columns of information to print.

1. From the Workflow tab, click the Print icon ( ).

   A window appears with a list of columns from which you can choose to print. By default, all columns are selected.

2. Clear any columns you do not want to print.

   By default, the **Shrink to Fit Landscape Page Width** box is checked.

3. Optionally, clear the **Shrink to Fit Landscape Page Width** checkbox to print the columns at a size of 100%.

If you keep this option checked, all selected columns print on a single page. If you use this feature, change your printing preference (for this print job) to landscape.

4. Click **Print Selected Columns**.
5. Click **Print**.
6. Select your printer and printer options, then click **Print** to print the selected workflow columns.

   Choose landscape mode for best results.
7. In the preview window, click **Close** to close the print preview.

Post task update dialog box

This dialog appears when you click a workflow task in view mode. Use this dialog as a quick alternative to editing the entire workflow, when you only need to update a single task. From this dialog, you can update certain items, add task attachments, as well as adding comments to the revision history of the project .

The Post Task Update dialog box contains two tabs, **Status** and **Attachments**.

Status

The **Status** tab contains the following fields.

Field	Description
Owner(s)	The task owner or owners. At the task level, project members are referred to as task owners. That is, in the workflow spreadsheet, you use the **Members** column to add people to a task; this column refers to project members. When you open the task in the **Post Task Update** screen, these members are listed as Owners (which refers to task owners).
Target Dates	The forecast or actual start and end dates, as well as the duration for the task. You can edit either or both of the date and time selectors to update the information.
Status	The status of the task. Edit this field by selecting a value from the field’s pull down menu.
% Complete	The current progress for the task. Enter a number between 0 and 100 to change the value.
Actual Effort	The effort for the task, measured in days. Enter a value to update the field. This field can contain partial days, for example, `3D-2H-0M`

Field	Description
Forecast /Actual date and time fields	The Forecast/Actual begin and end dates and times for the task. You can edit either or both of the date and time selectors to update the information. Begin and end dates are mandatory; you receive a warning if you attempt to save without entering values for both fields. Additionally, the system checks to ensure the end date is not earlier than the begin date.
Comments	Displays comments for the task. You can enter text to update the field. These notes go in to the revision history of the project and any notifications that may be sent about the task.
Enable Task Attachments	A flag to determine whether or not the task can contain attachments. This field is visible to project owners only. Check the box to allow the task to contain attachments.

Make sure you close the dialog box by clicking either **Save and Return** or **Cancel**; if you do not use one of the buttons to close the dialog box, the task may remain locked, and no one else can edit it.

To change the state of a finished task back to active, you must set both the **Status** to **Pending**, and the **% Complete** field to an integer less than 100. If you do not change both fields, after you close the dialog box, the task is still marked as completed.

Attachments

The **Attachments** tab contains the following fields.

Item	Description
Current attachments section	The top portion of the page describes the current attachments of the task. It contains three columns of information for each attachment: • **File**: Contains a link to the attachment file and describes the file type and size. • **Description**: Contains revision history and description for the attachment. The name of the user who added the attachment is listed. This is important, as the creator differentiates attachments with the same name for the same task. • **Actions**: Contains links for deleting the attachment or for sending the attachment via email.
File to Attach	Contains a drop-down menu that allows you to specify the source of the file to attach.
Browse	Use this button to browse your computer or the asset libraries for the file to attach.

Item	Description
Comments	Use this text box to add any comments for the attachment.
Attach Selected File	Use this button to attach the selected file or URL.

Related Topics

- Workflow tab fields

Managing task dependencies

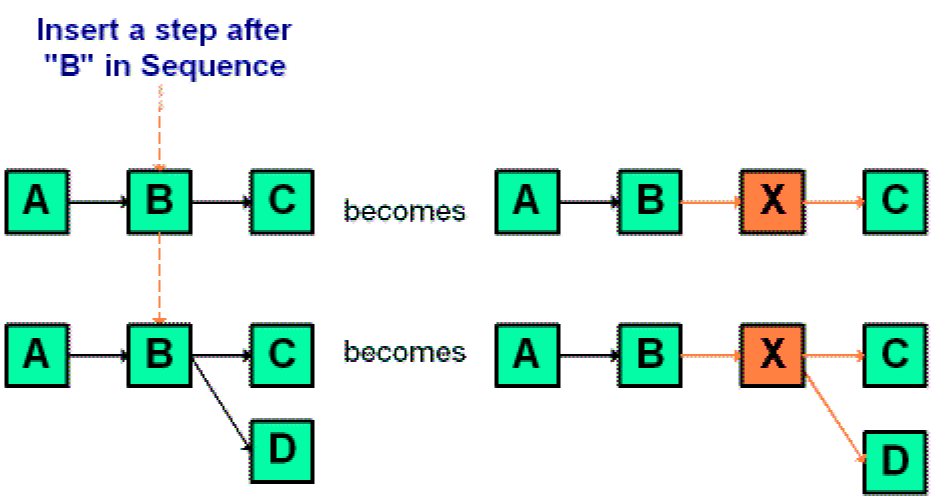
IBM Unica Marketing Operations has several options for managing dependencies on tasks as new rows are added to the spreadsheet and existing rows are removed.

- **Normal**: no dependencies are automatically created. If you need dependencies for the new tasks and stages, create them manually.
- **Sequential**: insert the new task in an existing chain of tasks.
- **Parallel**: insert a new task branch parallel to an existing chain of tasks.

Inserting tasks in sequence

Insertion **in sequence** makes the new task dependent on the task before it, and then makes all items that were dependent on that task dependent on the new task.

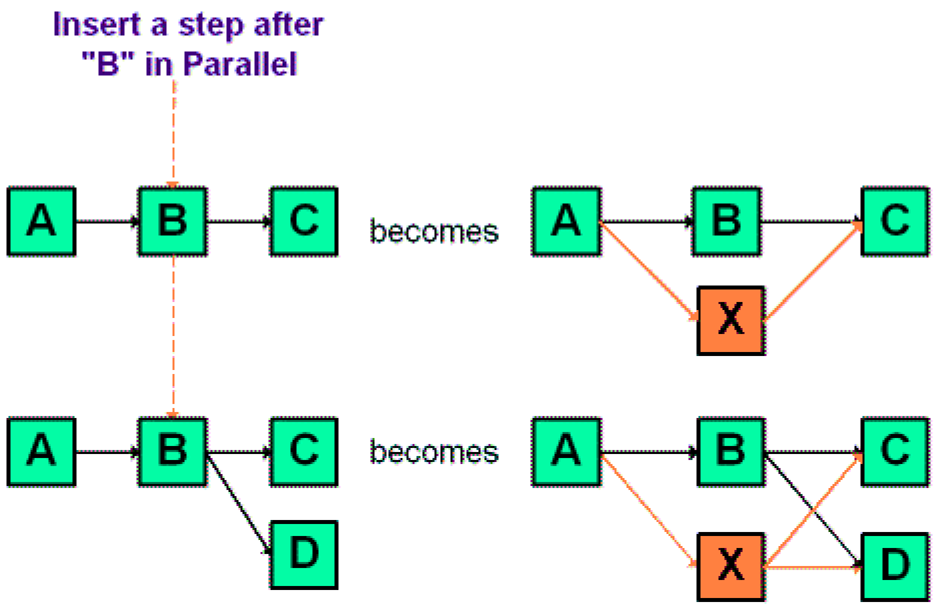
You insert a task in sequence when it can only start after the previous task has completed. For example, in the figure below, if task X cannot be worked on until task B has been completed, you insert task X in sequence.



Inserting tasks in parallel

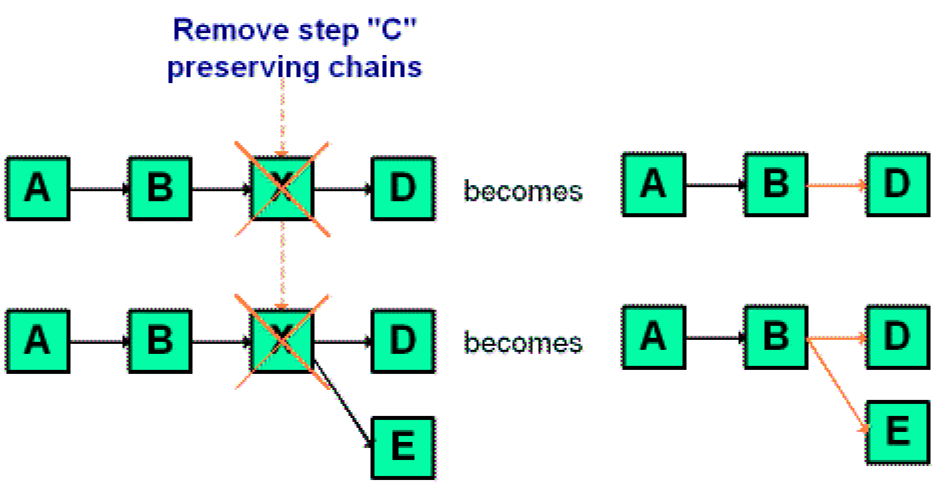
Insertion **in parallel** makes the task dependent on the items (tasks or stages) that the task before it was dependent on, and makes the items dependent on the previous task dependent on the new task as well.

You insert a task in parallel when it can be worked on at the same time as another task. For example, in the figure below, if task X can be worked on simultaneously with task B, you insert task X in parallel.



Deleting tasks

Deleting a task removes the selected task from the chain, but re-links the two remaining segments of the chain together so that it is one continuous chain again.



When a task is deleted its dependents are made dependent on its dependencies before the deletion takes place. This preserves all sequential chains of dependencies.

Default and "last used" modes

To make adding a task as simple and consistent as possible, IBM Unica Marketing Operations provides the following behavior.

- The default mode is "in series;" when you begin an editing session, this is the insertion mode.
- There is a "last used mode," remembered for each editing session. Once you select a mode from the menu, this mode is used each time you add a task during the remainder of your session.

For example, to add several tasks in parallel, you only need to select the **in parallel** mode once; then every time you insert another task, the system inserts it in parallel, unless you explicitly select another mode.

7 Approvals

Approvals

An **approval** allows you to streamline and track the process of having your work reviewed and approved. This allows many users to review work in parallel or in an order that represents your business processes. Reviewers (or approvers) can electronically mark up content submitted for review. IBM Unica Marketing Operations then records approvals and denials for audit purposes. You can tie approvals to a project or they can exist independently from any project.

Related Topics

- About approvals
- Approval dates
- Due dates for approvals
- Approval views

About approvals

An **approval** is an item or group of items that approvers review and respond to, either by approving, suggesting changes, or denying. IBM Unica Marketing Operations contains two types of approval processes: stand-alone approvals and approval tasks in workflows.

The **approval process** is the lifecycle of an approval. It is set up by a project owner, and contains all the details about what to approve, who should approve, and when people should approve. Typically, an approval goes through four stages: it is created, submitted, active and completed. The system notifies the required approvers by sending alerts and emails. The approvers can pose comments or questions before they make a decision. And when the approval is completed—either approved or denied—the approval owner or reviewer gets notified about the results.

Note that you can create an approval process without any approval items, and approvers can still respond to it.

The following are valid approval statuses.

- **Not Started:** an owner creates an approval, beginning the approval process.
- **In Progress**: when ready, an owner submits the approval, changing its status from **Not Started** to **In Progress**.

  While the approval's status is **In Progress**, approvers review it, comment on it, and respond. Additionally, if the approval is linked to a task in a workflow, its progress is tracked in the % Complete column.
- **On Hold**: an owner can temporarily stop an approval, if necessary, changing the approval's status to **On Hold**.
- **Cancelled**: an owner can cancel the approval, changing its status to **Cancelled**.
- **Completed**: the owner marks the approval as finished, changing its state to **Completed**.

An **approval owner** is the person who created the approval. Normally, the owner has all the capabilities associated with the approval (such as being able to delete it or change its status), although this can be changed depending on the security policy associated with the approval.

An **approver** is someone who has been designated to review a particular deliverable and approve or deny it. There are several ways an approver can be designated:

- add the person directly to the approval process itself, or

  add the person as a **reviewer** to the project, and this may auto-populate approval processes created from the workflow, depending on how your administrator has set up the project templates.

A required approver is an approver who has been designated as required, as opposed to optional. For an approval process to be marked complete, all required approvers must respond to the approval.

An **approval round** indicates how many times an approval has been submitted. The first time an approval owner submits an approval, its round number is 1; the system increments the round number each time the approval is resubmitted.

Stand-alone approvals

Stand-alone approvals exist apart from any projects or other business process. They are not connected to any workflows and their security permissions are configured differently.

To create a stand-alone approval, select **Operations** > **Approvals** and click the **Add Approval Process** icon ().

Approval tasks

An approval task is an approval process that is connected to a step in a workflow. An approval that is linked to an approval task in a workflow can be updated in either the workflow or in the approval itself. Additionally, changes made to one are automatically propagated to the other.

If you want the approval process to be connected to an approval task in a workflow, create the process from the Workflow tab of the project. To add an approval task to a workflow, your security role must have the **Add/Edit/Delete Tasks/Approvals, Dependencies and Targets** setting enabled.

An approval created from a workflow task may already have some information filled in, based on the approval task it represents.

Approval dates

When you create an approval from a workflow task, note the following behavior concerning the Forecast/Actual and Target dates for the approval.

- If the task contains a date in either the Target End Date or Forecast/Actual End Date field, the system automatically copies the date into the approval’s Target Due Date.

  If the task contains dates in both fields, the Forecast/Actual date is copied to the approval.

- If you modify the date in the approval’s Target Due Date field, the Forecast/Actual End Date in the corresponding workflow approval task is updated with the new date.

Note the following about the way IBM Unica Marketing Operations calculates duration when the project owner enters the start and end dates for an approval from a workflow task.

- If the duration is less than what is specified in the approval for each approver, an equal amount of time is deducted from each required approver.
- If the duration is more than what is specified in the approval for each approver, an equal amount of time is added to each required approver.
- If the approver has already responded, the duration for that approver is not adjusted. The durations of the remaining approvers are adjusted if possible; if this is not possible an error message is displayed.
- If for any reason an approver's duration can not be adjusted automatically, an error message is displayed requesting different values.
- The Forecast/Actual Duration field in the workflow is overwritten with the sum of approver durations if an approver's duration is changed and saved.
- Marketing Operations automatically calculates the approval start date if the Forecast/Actual duration and Forecast/Actual end date are changed .

Due dates for approvals

Approval due dates are determined differently for required reviewers than they are for optional reviewers. For optional reviewers, the due date is the date the approval was submitted plus the duration specified for the reviewer, regardless of the reviewer's sequence in the process.

Due dates for required approvers do not include durations for optional revieweres and are calculated as follows:

```
Approval submission date + sum of previous required approvers' durations =
current approver's due date
```

For example, if there are three required approvers, each approves in sequence, and the duration for each is one day, then the due date for the third approver is three days after the approval was submitted.

The durations for approvers working in parallel - that is, they have the same sequence number in the process - is calculated as follows.

- The duration is counted once; it is not summed.
- If the durations have different lengths, the longest duration is used.

For example, consider an approval process configured as follows.

- Approval submission date: 25 August 2008 03:00 PM
- Target due date: 30 August, 2008 05:00 PM
- Four approvers:

Approver	Sequence	Duration	Required?
A	1	01D-00H-00M	yes
B	2	01D-00H-00M	yes
C	2	01D-00H-00M	yes
D	3	01D-00H-00M	yes

The due dates for the approvers would be.

- Approver A: 26 August 2008 03:00 PM
- Approver B: 27 August 2008 03:00 PM
- Approver C: 27 August 2008 03:00 PM
- Approver D: 28 August 2008 03:00 PM

Now, if the duration for Approver C was two days, then the due date for C would be 28 August and the due date for D would be 29 August. That is, there would be two days between Approvers A and D, not three.

While calculating dates, the system-wide setting for non-work time is considered. Depending on the value of this setting, weekend and/or other non-business days could be included in the calculation.

Related Topics

- About non-work time
- Approvers

Approval views

IBM Unica Marketing Operations organizes approvals in views as described in the following table.

View	Description
All Approvals	Lists all approvals. It also contains links to the other approval views. Additionally, if there are any saved searches for approvals, they appear as links on this page.
My Active Approvals	Lists any active approvals to which you can respond. It also contains a link to the **Approvals Pending My Response** view. This is the default view.
Approvals Pending My Response	Lists all the approvals waiting for your response. This is a subset of the **My Active Approvals** view. It includes any approvals that are waiting for your approval (that you have not responded to already). You can also see approvals pending your response on the My Tasks page.
All My Teams Approvals	Lists all approvals assigned to members of your team.
All My Teams UnAssigned Approvals	Lists all approvals that have been assigned to your team but that have not yet been assigned to an individual team member by your team leader.

Reviewing attachments in Unica Marketing Operations

The markup tools play an important role in the review process, enabling you and others to add feedback directly on top of an attachment. IBM Unica Marketing Operations allows users to mark up attachments for plans, programs, projects, and marketing objects in either of the following ways.

- Marketing Operations can open a PDF document in Adobe Acrobat. Users can use all of Acrobat's markup features to make comments, then save the comments in Marketing Operations.
- Marketing Operations can be set up to use native markup functionality, which allow users to mark up the following file types.

- PDF (each page of the PDF is converted to an image for markup)
- GIF
- JPG (RGB only, not CMYK)
- PNG
- BMP
- HTML pages and hosted web sites

During installation, an administrator chooses which type of markup to enable throughout the application.

For both types of markup, note the following:

- You access the IBM Unica Marketing Operations markup tool by clicking the **View/Add Markup** link for an individual approval item.
- Marketing Operations tags markups with the name of the person who made the comments, so everyone can view all review comments at once, or one reviewer's comments at a time.

About HTML and native markup

You can upload an entire web site for review. However, the following limitations apply.

- Unica native markup does not support markup on web sites that include or are built entirely using Flash.
- Pages that require server side processing, such as CGI, ASP, ASPX, CFM, do not work properly in the markup tool.
- Framed sites are not supported.

As an alternative solution to uploading HTML files, consider a URL to link to externally hosted content.

Related Topics

- About using Adobe Acrobat markup in Unica Marketing Operations
- About native Unica Marketing Operations markup
- About enabling markup for approval items
- To use markup
- Using Adobe markup on the Apple Macintosh

About using Adobe Acrobat markup in Unica Marketing Operations

If you are using Internet Explorer as your browser for IBM Unica Marketing Operations, you must set your Internet Explorer preferences to display PDFs in the browser.

If your Marketing Operations installation is set up to use Adobe Acrobat markup, and you are working on a Microsoft Windows platform, you must have the `skdSOAPCollabSample.js` file in the JavaScripts subdirectory of the directory where you installed Adobe Acrobat. For example:

```
C:\Program files\Adobe\Acrobat 6.0\Acrobat\Javascripts
```

Your IBM Unica Marketing Operations administrator should be able to provide this file if you do not have it already. It is located in the `tools\admin\db` directory under the Marketing Operations installation.

Note the following.

- If you cannot view other approvers' comments, you may be missing the `sdkSOAPCollabSample.js` file
- If you run Acrobat before copying this file, you must reboot your computer to use the markup capability.

Unica does not support using the **Save and Work Offline** button in Adobe Acrobat. That is, if you use **Save and Work Offline**, add markup, go back online, and try to send and receive your comments, your edits may be lost.

Related Topics

• Reviewing attachments in Unica Marketing Operations

About native Unica Marketing Operations markup

The native IBM Unica Marketing Operations markup tool uses the following buttons and items. All buttons include mouse over help.

If another user is marking up a document at the same time as you, refresh the browser page to see their comments.

Menu bar

This table describes the items in the menu bar.

Icon	Description
	Click **Add Note** button, then drag and drop to add feedback to a specific location on a page. You cannot move a note once saved. Each note is fixed to a location that is important to the context of the feedback and any replies. You can attach a file to a note. Use the action links in a note to reply to, update, or delete the note.
	Click **Add Scribble**, then drag and drop to add a free-from "scribble."

Icon	Description
	Click the **Zoom In** to zoom in.
	Click the **Zoom Out** to zoom out.
	Click **Zoom Reset** to reset the size of the page to the original display.
	Click **Download Original** to acquire a copy of the original attachment that you can save to your local machine.
	Click **Toggle Annotations** to display or hide comments.
	Click **Help** for tips on using native markup.
	Click **Close Markup Window** to close the markup tool.

Annotations List

This table shows the items available in the annotations list. Note that you can sort on any column by clicking its header.

Item	Description
Page filter	A drop-down list where you can choose to view annotations for the current page only, or for all pages in the document. If you select **All Pages**, you can sort in ascending or descending order by clicking the heading of the **Source** column.
Annotations filter	A drop-down list where you can choose to view all annotations, only active annotations, or only archived annotations.
Author filter	A drop-down list where you can choose to view annotations from all authors or only a single selected author. If you select **Any Author**, you can sort by ascending or descending order by clicking the heading of the **Author** column.

Item	Description
Actions column	On the page you are viewing, contains the following options. • —Show Reply Dialog allows you to reply to the comment. Your reply can include a heading, a body, and an attachment. • —Update allows you to edit the comment. You can archive the comment, change the text in the heading and body, and add an attachment. • —Delete allows you to delete the comment If you are viewing all pages, the **Actions** column for comments on pages you are not viewing contains a V (View) option that allows you to jump to the page on which the comment exists.
Created Date column	Shows the date on which the comment was added.
Author column	Shows the comment's author.
Title	Shows the comment's title.
Attachments	Provides a link to the comment's attachments, if any.
Archived	A check in this column means the comment is archived.

About enabling markup for approval items

Owners of approvals can choose whether to enable markup for attachments. If markup is enabled for an attchment, and if IBM Unica Marketing Operations is configured to enable markup for the attachment's file type, anyone who can view the attachment can use the markup functionality to comment on the object.

Approval owners enable markup functionality on attachments in two ways.

- When an owner adds an item to an approval, the system prompts to enable markup for the PDF.
- For an existing approval screen, each approval item has Enable/Disable Markup links. Click the link to toggle the markup functionality.

To allow users to add comments, choose **Enable Markup** when prompted.

To use markup

During installation, IBM Unica Marketing Operations was configured to use either Adobe Acrobat markup or native Marketing Operations markup.

Anyone who has permission to view an approval can add comments to items attached to the approval.

Note the following.

- Markup is only for latest/last version of the approval item.
- You can mark up items for an approval with a status of In progress or On hold only.

1. Navigate to the approval that contains the item to edit.
2. Click **View/Add Markup** next to the item on which to add comments.

   If the link is unavailable, the owner of the approval has chosen not to enable markup for the item.

   The item opens in a browser containing the document.
3. Mark up the item using either Adobe Acrobat or the native Marketing Operations markup tool, depending on your installation.
   - If your system uses Adobe Acrobat markup, only PDFs can be marked up. Click **Review & Comment** in the Acrobat toolbar and click **Note Tool** in the Commenting toolbar to start adding comments to the PDF.
   - If your system uses the native Marketing Operations markup, use the icons and action buttons in the markup tool. All buttons include mouse over help. Inactive buttons are gray and cannot be selected.
4. Close the window that contains the marked-up item.

Any member can see the marked-up item by opening the container object and clicking **View/Add Markup**. Members keep adding markups to the file this way. To view the original file without the markups, click the link containing the name of the attached item instead of View/Add Markup.

Related Topics

- About native Unica Marketing Operations markup
- About using Adobe Acrobat markup in Unica Marketing Operations

Using Adobe markup on the Apple Macintosh

This section discusses behavior for users working on Macintosh, using the Safari browser, and Adobe Acrobat markup functionality.

- You must have Adobe Acrobat Standard or Professional 6.0 or higher.
- You must configure Acrobat as follows. Note that you must perform this configuration when Acrobat is opened on its own, not through the browser.
  - Select **Edit > Preferences > Reviewing** and select **Custom** in the **ServerType** drop-down list.
  - Select **Comments > Show Comment & Markup Toolbar**.
- IBM Unica Marketing Operations tags the approvers' comments with their Macintosh login name, which may be different than their Marketing Operations user name.

- If you use Notes, Text Annotations, or other Acrobat markup functionality where text is entered, after you mark up a page of the item to be approved, you must click outside the text field (outside the **Notes** text field, for example) before you click **Send Comments**. If you do not do this, the Macintosh will not send the text portion of the markup back to the server, and the field appears empty when a user opens it in Acrobat.
- When you use Acrobat markup on the Macintosh, the stamp tool always displays the name of the user currently viewing the markup, not the name of the user who is doing the markup.
- Each time you open a PDF, a blank Safari window opens.
- When using the markup capabilities within IBM Unica Marketing Operations with the Safari browser, temporary internet files are stored on the Macintosh desktop.
- There are two **Send** icons: one is the same as seen in Windows, and the other is a IBM Unica Marketing Operations custom button specific to the Safari browser on Macintosh: . You should use this button to capture markup comments; the Windows icon does not work.
- If you are using Acrobat version 6, when you click the markup link for an approval, the Safari browser opens the PDF inline, rather than in an Acrobat screen.

This behavior does not exist if you are using Acrobat version 7. Unica recommends you upgrade to version 7, if possible.

If you want to view the PDF in an Acrobat screen, perform one of the following actions:

- To open the current document in an Acrobat screen, right-click (hold the **CTRL** key down while clicking the mouse if using a one-button mouse) on the PDF and choose **Open with Acrobat 6.0 Professional**.
- To always open PDFs in an Acrobat screen, run the following command in Terminal:

```
$> defaults write com.apple.Safari WebKitOmitPDFSupport-bool YES
```

Approval process workflow

The lifespan of an approval process includes the following general stages.

1. You create the approval process, either as a stand-alone approval or as an approval task in a workflow.
2. Add the items to be approved.
3. Add approvers.
    - You can add as many approvers as you need.
    - You specify whether each approver acts in parallel with other approvers or before or after any other approver by specifying a sequence number.

    - You specify approvers as required or optional.
    - You can create individual instructions for each approver.
    - If you are adding an approval workflow task, you may need to select project roles for the approvers, for example **legal approver** and **subject approver**.
4. Submit the approval.
5. The system immediately notifies all the approvers with the sequence number of "1."

   No other required approver can respond to the approval yet; they must wait their turn, which is based on the sequence order you specified when creating the approval. However, optional approvers can respond at any time; optional approvers are not tied to the established approver order.
6. Approvers respond to the approval. Depending on how IBM Unica Marketing Operations is configured, the approver may also be able to place comments in approval items.
7. Approvers assess each item attached to the approval and then post their completed response.
8. The system notifies the next approver(s), based on the sequence numbers set in the approval.

Several things to note about approval processes.

- The approval owner can cancel the approval process at any time in the process.
- Approvers provide a separate opinion about each item in the approval: approve, approve with changes, or deny. They then post the entire response.
- Marketing Operations organizes approvals in views. When you click **Operations > Approvals**, by default the **My Active Approvals** view appears. This list shows only approvals that are active and you are a member of (as either an owner or approver).

  You can click the **Actions** icon () and select **All Approvals**, **All My Team's Unassigned Approvals**, or **All My Team's Approvals**.
- In any view, you can change the sort order by clicking on the column you want to sort by. Click the column a second time to reverse the sort order.
- If an approval is linked to a task in the workflow, then the system takes into consideration the Schedule Through setting for the task in addition to the system-wide setting for non-work days.
- Approvals do not appear on the approval list of required approvers until it is their turn to respond, at which time they will also receive a notification.

Related Topics

- New/edit approval page
- About enabling markup for approval items
- To submit an approval for review
- Due dates for approvals
- Work and non-work time settings
- About native Unica Marketing Operations markup
- About using Adobe Acrobat markup in Unica Marketing Operations

To submit an approval for review

After you add an approval process you must submit the approval to notify the approvers that the approval exists and they need to approve it.

1. Navigate to the Summary tab of the approval you want to submit.
2. Click the **Status** icon () and select **Submit for Review**.

   The Approvals window appears.
3. Enter any comments you want the approvers to see when they receive notification of your approval, and click **Continue**.

   The Summary tab of the approval appears with `In Progress` at the top of the page.

> After an owner submits an approval, its status changes to In Progress. If an owner makes any further changes to the approval, IBM Unica Marketing Operations sends notifications to all owners and approvers.

About modifying approvals

After an approval has been created and even submitted, the owner may want to make changes. For example, the owner can add new items for approval or new approvers to the list. The owner may also want to delete items and approvers, or update existing items to be reviewed.

The process of modifying an approval is very similar to creating one. Keep in mind the following rules and behaviors for modifying an approval.

- Any owner of the approval process can modify it.
- By default, approvers cannot modify the information in the approval; they can only respond to the approval, unless the security policy allows it.
- If modifying an approval that has been submitted, the Approvals screen appears and prompts you to add comments to send to new and existing approvers.
- If you want to have an approver that has already responded view the changes, check the approver’s **Request Reapproval** checkbox.

Note that whenever any approver is checked and you want them to re-approve, the system increments the approval round number.

Related Topics

- New/edit approval page
- Items to approve

To cancel an approval process

You can cancel the approval process at any time. Canceling the process does not delete the approval. You might decide to cancel rather than delete a review if you think you will need to see its details in the future.

If you cancel the approval process you cannot submit it for review at a later time. Any responses or comments made before cancellation will be saved, essentially “freezing” the approval with all of its current details.

1. Select **Operations > Approvals**.

   The **My Active Approvals** view appears by default.

2. Click the **Actions** icon ( ) and select **All Approvals**.
3. Click the approval you want to cancel to open it to the **Summary** tab.
4. Click the **Status** icon ( ) and select **Cancel Review**.

   The Approvals window appears.

5. Enter any comments you want to add to the approval, for example, why you want to cancel the review, and click **Continue**.

   The **Summary** tab of the approval appears. The **All Approvals** view shows the approval as **Cancelled**.

   If you cancel an approval that is linked to a workflow task, the task is “crossed out” on the workflow tab. That is, the font for the task and all of its details changes to italics, strikethrough. Additionally, there is an ‘x’ in the status column, indicating the workflow is considered "Skipped."

Related Topics

- New/edit approval page
- To delete an approval

To copy an approval

You may want to copy an approval if you want to create another approval that is very similar to an existing approval. You can make a copy of the existing approval and modify the copy, leaving the original approval intact.

1. Navigate to the approval that you want to copy.

2. Click the `Copy this Item` icon ().
3. Click **OK** when Marketing Operations prompts you as to whether you want to copy the approval.

The copy of the approval opens to the Summary tab. The copy appears as Copy of `the original approval name`. The new approval has a status of Not Started.

Modify any information you want to change in the copy and click **Save Changes**.

The copy appears in your **All Approvals** view.

Details copied

The following details are copied.

- List of approvers and whether they are required or optional
- List of owners
- The subject, with “Copy of” prepended to the original approval name
- Target Due Date
- Sequence
- Description
- Items to approve

Details not copied

The following items are **not** copied.

- Any instructions for individual approvers are not copied.
- The contents of the message board are not copied.
- Information on the Analysis tab is not copied.
- The copy will not be linked to any project workflow, even if the original is. That is, copying an approval creates a stand-alone approval

To delete an approval

As the owner of the approval, you can delete the approval at any time.

1. Select **Operations > Approvals**.
2. Select the checkbox next to the approvals you want to delete.
3. Click the **Delete this Item** icon () and click **OK** when IBM Unica Marketing Operations prompts you to confirm the deletion.

   You cannot delete an approval that is linked to a workflow task.

To complete an approval

After some criteria are met, it is a good idea to mark the approval complete. Unless the approval was created with the **Enable approval auto completion** flag enabled, it is entirely up to the approval owner as to when to do this. If auto-completion is enabled, the approval is automatically marked Complete when the last required approver approves.

The following are some examples of when you might want mark an approval as complete.

- After all approvers have responded
- After the Target Due Date has passed
- After all suggested changes to approval items have been made

1. Select **Operations > Approvals** and then click the approval that you would like to complete.
2. From the Summary page, click the **Status** icon ( ) and select **Finish Review**.
3. Enter a comment about why you want to complete the review in the Approvals window, and click **Continue**.

The approval appears with a status of **Completed**, and IBM Unica Marketing Operations sends a notification that the approval process is finished.

To put an approval on hold

At any time after you submit an approval for review you can put the approval on hold. You can do this to revise the approval items and request re-approval. Putting an approval on hold is different than canceling a review of an approval process because you can make modifications and continue the approval process.

Note the following behavior when you put an approval on hold.

- IBM Unica Marketing Operations notifies the approvers that the approval is on hold.
- Approvers cannot approve or reject the approval during the time it is on hold.
- Owners can view the approval and add comments to any items submitted for approval while the approval is on hold.

1. Select **Operations > Approvals** and then click the approval you want to put on hold to open it.
2. Click the **Status** icon ( ) and select **Stop Review**.
3. Enter a comment about why you want to stop the review in the Approvals window.
4. Click **Continue**.

The Summary tab of the approval appears with the status set to **On Hold**. IBM Unica Marketing Operations sends a notification to the approvers informing them that the approval is on hold.

To reactivate an approval that is on hold

1. Select **Operations > Approvals** and then click the approval you want to reactivate.

   You may need to click the **Actions**icon and select **All Approvals** to see your approvals that are currently on hold.
2. Click the **Status** and select **Continue Review**.
3. Enter a comment about why you want to continue the review in the Approvals window, and click **Request Approvals**.

   Note that whenever any approver is checked and you want them to re-approve, the approval round number is incremented.

The approval appears with a status of **In Progress** and IBM Unica Marketing Operations sends a notification to the approvers that the approval is active and they can respond.

To respond to an approval

When it is your turn to respond to an approval or complete an approval task, IBM Unica Marketing Operations notifies you through the Alerts window and via email. Both the alert and the email contain a link to the approval. You can view the approval in various views in Marketing Operations, such as the **My Active Approvals** view.

Complete the following steps.

1. Click the link to the approval.
2. At the top of the **Approval Response** form, examine the approval description and the instructions.
3. View an approval item by clicking the item’s thumbnail image or the link next to it.

   The item opens in a browser.

   Select **View/Add Markup** to add in-document comments to the item. If you do not choose this link, any comments you make are lost when you close the item.
4. For each item listed, complete the following steps.
   a. Click **Post Feedback**.
   b. In the **Response** window, enter your review comments in the **Your Response** section.

c. As an alternative to entering comments in this form, you can attach a document that contains your comments. Under **Additional Comments**, click **Attach Comments File** and upload the file that contains your comments.

d. Select the appropriate response for the item.

- **Approve**: indicates that you approve of the item as it is.
- **Approve w/Changes**: indicates that you made comments in an item or added comments in the text box and you approve the item with those exceptions
- **Denied**: indicates that made major comments or suggestions necessitating fundamental editing of the item(s) by the approval owner.

5. When you have responded to each item in the list and you are sure that you are finished commenting, click **Post Complete Response**. At this point you cannot change your response.

   The response form appears with your response listed next your name in the list of approvers. IBM Unica Marketing Operations sends an alert and an email message containing your response to the approval owner and sends an alert to the next reviewer, if any.

Related Topics

- To reassign a team approval
- About alerts and the message board
- About native Unica Marketing Operations markup
- About using Adobe Acrobat markup in Unica Marketing Operations

To reassign a team approval

A team can be assigned as an approver. The routing options for the team determine whether team members can respond to such an approval, or whether the team manager must assign it.

- If the team has **Managers can route approvals to members** enabled, the manager can assign approvals to members.
- If the team has **Members can accept team-assigned approvals** enabled, team members can assign themselves approvals, without the manager needing to do so.
- If the team has **Members can return team-assigned approvals back to the team** enabled, team members can return approvals back to the queue for the team.

1. Select **Marketing Operations > Approvals**.
2. Click the **Actions** icon () and select one of the following searches.
   - **All My Team Approvals** or
   - **All My Team Unassigned Approvals**
3. Select the approval or approvals to assign.

4. Click the **Reassign Selected** icon ().
5. For each selected task, select a team member for the assignment in the **Assign To** field.

   Team members can only assign tasks to themselves or back to the team.

6. Once you have made all the assignments, click **Save Assignments** to save your changes and return to the Approvals list page.

Once you or your team manager has assigned an approval to you, you respond to it in the same way you respond to approvals assigned to you as an individual IBM Unica Marketing Operations user.

Related Topics

- To respond to an approval
- Task routing options

To add comments to an approval item

The owner can open an approval at any time and add in-document comments to approval items. Approvers or other team members who can access the approval can also use the markup capabilities to add comments to the item. Approvers can view the comments added by other approvers.

1. Click the link in an alert or email notification message to open the approval, or select **Operations > Approvals** and click the approval that has an item you want to modify.
2. Click **View/Add Markup** next to the item that you want to add comments to.
3. The exact steps for adding in-document comments depend on whether you use Marketing Operations or Adobe markup. In either case, add any comments to the document.
4. After you finish marking up the document, close the window that contains the marked-up item.

Any team member of the approval can see the marked up approval by opening the approval and clicking **View/Add Markup**. Team members keep adding markups to the file this way. To view the original file without the markups, click the link containing the name of the attached item instead of **View/Add Markup**.

Editing an approval that is linked to a workflow task

Both standalone approvals and workflow approvals are listed in the approval views. When you select an approval from either the view mode of a workflow or from a list in an approval view, IBM Unica Marketing Operations displays the approval in a pop-up window. When you edit an approval that is linked to an approval workflow task, your work is reflected in the workflow task as follows.

Your action	Changes to the linked workflow task
Cancel the approval	The task status changes to **Canceled**.
Change the approval due date	The task **Forecast/Actual End Date** changes to match.
Start the approval	The task status changes to **Active**, and the **Forecast/Actual Start Date** is set to the current date.
Pause the approval	The task status changes to **On Hold**.
Complete the approval	The task status changes to **Finished**, and the **Actual End Date** is set to the current date.
Delete the approval	You cannot delete a linked approval from the approval itself. You must delete the approval task row from the workflow.

Approval response form

The Approval response form has two main areas, the Approval Summary and Responses.

Approval response header

The header displays the name of the approval, the user that sent it, and the date the approval is due. For example:

```
Handouts for Leads, sent by asm admin (due 03/20/2009)
```

The following icons may appear, depending on the user's permissions.

- The **Edit** icon () is visible, if the user has edit permission for approvals.
- The **Status** icon () is disabled, unless the user has alter approval status permission.

Approval summary

This section of the Approval Response form displays the items for review and their accompanying descriptions.

On the right side of the section, the state of the approval (for example, **In Progress**) is displayed.

You can select an item to view. If commenting is enabled, you can also view comments other approvers have made and add your comments to the file.

Item	Description
Description	Displays the description for the entire approval.
List of items	Displays all the items for the approval. Note the following: • Click the item name to open the item in its own window. • Click **View/Add Markup** to add comments to a PDF. This link is available for PDFs only, and only if markup has been enabled for the item. • Click **Post Feedback** to add comments for the item. A new page appears that allows you to enter comments. Use the feedback page to add comments, attachments (such as screen shots), or add or view markup if applicable. • Click **Send as Mail Attachment** to send the item via your email application. • Click the status of the approval item (for example "2 of 3 Approved") to view the details of each response.
Instructions	Displays any instructions for the approver.
Approval status bar	Displays your progress for the current approval. For example: `You have approved 1 item(s), denied 0 item(s) and pending 1 item(s).`
Post Complete Response	Click this button when you have responded to all the approval items. A confirmation page appears where you can add any final comments. Note the following. • If the approval owner has required disposition of all items, and you click this button before responding to all items, the system generates the following warning message: "Please respond to all documents before marking the process as complete." • If the approval owner has not required disposition of all items, you must respond to at least one approval item, or the system generates the following warning message: "Please respond to at least one document before marking the process as complete." • You can respond to an approval item multiple times before you complete your response to the entire approval process. However, once you click the **Post Complete Response** button to complete the review, you cannot respond to the approval again.

Approval responses

This section lists overall status of the approval for each approver, in the following format.

- Name of the approver
- **(Required)** if the approver is marked as required.
- Response status: either Approved, Denied, Approved w/Changes, waiting, or not yet notified.
- Date of response, if the approver has responded.

Note the following.

- Overall approval response status is dependant on the response status of each approval item. For example, if an approval contains 2 items to approve, and approver approves (or approves with changes) both the items, then the overall response is Approved. But if approver denies one of the items, then the overall response is Denied, and the approval state is changed to Rejected.
- Once you complete your review, the **Post Feedback** link changes to **View Item Responses**. You then could only view the item responses and response history.

Notes on responding to an approval

Approval processes can contain sequential and parallel portions. For example, suppose the following approvers are set with the following sequence numbers.

- Mary Manager: 1
- Connie Contact: 2
- Larry Lawyer: 2
- Pablo Picasso: 2
- Charlie CFO: 3

Mary Manager, Larry Lawyer, and Charlie CFO act sequentially; that is, Mary Manager must act before Larry Lawyer, who must act before Charlie CFO.

Connie Contact, Larry Lawyer, and Pablo Picasso all act simultaneously, in parallel. That is, Larry Lawyer can respond even if Pablo Picasso has not yet responded, and vice versa.

Note the following approval behavior.

- You cannot respond to the approval if it is not your turn. When selecting such an approval, you will get a message that you cannot yet respond to the approval. Once the required approvers ahead of you have responded, you will be notified and be able to complete your review.
- If it is not your turn to respond, but you navigate to the approval and click **View/Add Markup** for an approval item, you receive a warning message.

- If a required approver denies the approval, the approval is put On Hold and no other required approvers can respond. For example, if the third of five required approvers denies the approval, neither the fourth nor fifth required approvers can respond. Instead, the system sends a notice to the approval owner and the first two approvers that the approval changed to On Hold.

  An approval owner must update the approval and request reapproval from the person who denied the approval in order for the next required approver to be able to respond.

IBM Unica Marketing Operations does not support using the **Save and Work Offline** button in Adobe Acrobat. That is, if you use **Save and Work Offline**, add markup, go back online, and try to send and receive your comments, your edits may be lost.

New/edit approval page

This page appears when you begin to add an approval process. It also appears when you open an existing approval process for editing. It contains two sections, **Approval Summary** and **Approvers** .

If you do not see the Approvers settings, click the turn down ( ) next to the **Approvers** label.

Related Topics

- Approval Summary
- Items to approve
- Approvers

Approval Summary

This section of the New or Edit Approval Process form contains some summary information for the approval.

The name of the approval contains a round number, if the approval round is greater than 1. For example, assume there is an approval titled **Handout: Final Approval** that has been resubmitted once. On its summary page, the title is **Handout: Final Approval (Round #2)**.

The Approval summary page contains the following fields.

Field	Description
Sent By	Displays a list of the owners of the approval. By default, this field is auto-populated with the user name of the person creating the approval. While the system allows owners to be approvers, this is not typical behavior; we recommend specifying people as owners or approvers, but not both.
Add/Remove Owner(s)	Click this button to add or remove owners for the approval process. The **Select Member Access Levels** dialog box appears. Browse to a user in the one of the folders and use the arrows to add the user to the **Selected Team Members** list and click **Save Changes**.
Security Policy	Select the security policy you want to apply to the approval. If this approval is already part of a project (or being linked to a workflow task), IBM Unica Marketing Operations defaults to the security policy for the project and you do not have to change it. If creating a stand-alone approval, this setting defaults to the security policy in your preferences (in the **Administration > Basic Settings** screen). If you don't know which security policy to select, contact your administrator.
Enable Mark up	When viewing the **Summary** tab, use this link to toggle the setting, either enabled or disabled. Once this option is enabled, the item can be marked up using IBM Unica Marketing Operations mark up functionality. This option is available only for file types for which markup is supported.

Approvers

This portion of the New or Edit Approval Process form contains a list of approvers and items to approve, as well as other options to configure the approval process.

List of approvers

This section of the page displays a list of approvers. By default, this field is empty. Add approvers by using the **Add Approvers** link.

Note the following:

- Individual users or teams can be set as approvers.
- By default, approvers are added as **Required**.

Field	Description
Approver role	A role or roles associated with the approval task. These can be loaded automatically from the project template used to create the project, or the project owner can set them up manually. This field is not available in standalone approvals.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Approver Name</td><td>Displays the user name of the approver. You can use the drop-down menu to update the approver.</td></tr>
<tr><td>Default Duration</td><td>Displays a duration selection control. Specify the actual duration for each approver or approval step.</td></tr>
<tr><td>Sequence</td><td>Displays the order in which the approvers need to respond. Enter integer values in the field for each approver, as follows.
Assigning the same number to more than one approver means that these approvers act in parallel, and can respond to the approval simultaneously.
When a user revisits this page, approvers are listed by their sequence number, rather than the order they were added to the approval.
Use the sequence numbers to specify the order in which approvers act, as well as whether some approvers act in parallel or in sequence.</td></tr>
<tr><td>Required</td><td>Check the box next to each approver who must approve. If this box is not checked, the approver is optional. Note the following behavior for required approvers.
If an approver is required, the next approver in sequence will not be notified (and can not respond) until the current approver has responded.
If an approver is required, and that approver denies the approval, then the next sequential approver is not notified; rather, the approval is placed on hold, and the owners are notified.
If multiple approvers have the same sequence number (and therefore can act simultaneously), and one of the required approvers rejects the approval, a notification is sent to the approval owner. However, the approval process continues until all the required approvers of the simultaneous process have responded.
At least one approver must be set to Required. Although a user can save the approval with all optional approvers, he or she could not start such an approval process. The system would generate a warning message if someone tries to start an approval that contains no required approvers.</td></tr>
<tr><td>Instructions for approvers</td><td>Add any instructions or comments for the approver to see when they open the approval.

This field is not available in a standalone approval.</td></tr>
<tr><td>Add approvers</td><td>Clicking this link opens the Select Approvers dialog box, where you can edit the list of approvers.</td></tr>
</table>

Other fields

The bottom portion of the page, above the list of approval items, contains the remainder of the approval settings.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Subject</td><td>Add a short subject for the approval. This text should be fairly descriptive, as it will show up in the Approval List for help in differentiating between all the approvals on the list.</td></tr>
<tr><td>Target Due Date</td><td>Enter a target date by which you want the overall approval process completed. Use the calendar icon in the drop down list to choose a date from the calendar.

Note the following.
This field is required to start the approval process.
Depending on project reminder settings, a reminder will be sent to approvers on the date you enter here.
If the approval is sequential, the Target Due date should be equal to today’s date plus the sum of the values in the Default Duration field for each approver.
If the approval is simultaneous, the Target Due Date should be equal to today’s date plus the maximum of the values in the Default Duration field for each approver.
For example, suppose the following approvers are added to the approval.<pre>
           Name   Seq.   Dur.   A
      1   1 day   B   2   2
days   C   3   1 day
</pre>If the approval is started on 14 July 2008, the Target due date would be 18 July. If you set the Target due date earlier than the correct calculation dictates, the system generates an error, and the approval cannot be saved until the durations and dates are reset to appropriate values.
You cannot start an approval process if its Target due date is past. You must first change the target date to some future date.</td></tr>
<tr><td>Description</td><td>Displays the text details for the approval.</td></tr>
<tr><td>Re-approval Rules</td><td>Select the rule to use for this approval. You can restart the approval, continue from current review step, or select the approvers who need to review again.</td></tr>
<tr><td>Disposition on all approval items required</td><td>Check box that determines whether all approval items need to be reviewed. If this box is checked, each approver must approve or deny all approval items.</td></tr>
<tr><td>Enable comment attachments</td><td>Check this box to allow approvers to add comments attachments while responding to the approval. By default, this option is selected.</td></tr>
<tr><td>Enable approval auto completion</td><td>Check this box to have the system automatically mark the approval Completed after the last required approver approves. By default, this option is not selected.</td></tr>
</table>

Items to approve

This section contains a list of actual items to be reviewed, and controls to add and configure approval items.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Item Thumbnail</td><td>Displays a thumbnail image of the item, if one was added when adding the item. If the item is a PDF, the image is the one your system uses to represent PDFs.</td></tr>
<tr><td>Item Description</td><td>Text box displays the comments for the item.</td></tr>
<tr><td>File Update, Asset Update, URL Update</td><td>When editing an approval, use these links to update items with a new version.
• Use File Update to upload an item stored on your computer or network.
• Use Asset Update to upload an item from an asset library.
• Use URL Update to change a URL pointing to a web site.
When you use one of these links, you attach a new version of the item; users can then access the older version and the newer version of the item in the approval.
There is no limitation placed on what kind item you select when you update. That is, the system does not object if you update a brochure with a logo image. However, if you are updating an item with something that is totally different from the original item, it is best practice to add it as a separate item rather than updating the original item.</td></tr>
<tr><td>Remove</td><td>When editing an approval, use this link to delete an item. It will no longer be available for review.</td></tr>
<tr><td>Add Item(s) to approve</td><td>Attach documents or URLs for approvers to review by clicking this link.
The Add Item(s) to Approve page appears.
• In the Add Item to Approve field, select one of the following options: From My Computer, From the Asset Library, URL,URL, or Marketing Object.
• Do one of the following.
  ◦ Browse to the file you want to attach, and click Open.
  ◦ Click <code>Browse Library</code> to attach a file in an asset library. Click the library that contains the file you want to add and use the tree in the left panel of the screen to navigate to the folder and then the asset that you want to attach. Click Accept Asset when viewing the asset in the right panel.
  ◦ Enter the URL in the field provided.
  ◦ Click <code>Browse</code> to search for a marketing object. When the dialog box appears, search and select a marketing object. Click <code>Accept and Close</code> to close the dialog or <code>Accept</code> to temporarily accept marketing object and search for more.
• Add any comments in the Comments field. Click Add More to display an additional set of fields for each additional attachment you want to add.
• Click Save Changes when you have added all your attachments.</td></tr>
</table>

Note the following.

- To add an item from your computer or network, choose **Add Item(s) to Approve**.

- If IBM Unica Marketing Operations is configured to use Adobe Acrobat markup, and if you want the approvers to have the ability to electronically add comments to a document, then the document must be a PDF. If you attach any other file format, approvers can not use the markup capability. You can use Adobe Distiller to convert a document to a PDF.

8 People and teams

People and teams

In IBM Unica Marketing Operations, you assign work to individual users or to teams.

Related Topics

- About people and teams
- To manage project members
- To manage reviewers
- Editing access levels for a member
- To change the access level for a project member
- To assign people to roles
- To add a role
- To remove a role
- To assign work by role
- Finding and replacing task members or reviewers
- Select project members/reviewers
- Team summary page
- To add or edit teams
- To edit members of a team
- About routing work for teams
- Assigning team tasks

About people and teams

You assign people or teams to units of work. You do this primarily through the People tab on a project. You can also add and assign members, teams, and roles when editing the workflow tab.

You may see only a subset of the peopleand teams available. Your organization can limit the view of available resources.

Related Topics

- About the People tab
- Managing teams
- About team alerts

About the People tab

Each project contains its own People tab. Use this screen to do the following.

- Manage the members of a project.
- Edit a member's access level.
- Replace a person in a role when a team member becomes unavailable.
- Add or remove a role.

A project template can contain information about the functional roles for the project. A template can reduce some of the work necessary to assign people or teams to units of work within the project.

Managing project members

Use the People tab to perform the following tasks.

- Add a project member.
- Remove a member from the project.
- Change a role for a member.
- Additionally, use this page to add and remove roles.

A role must exist within the project before you can assign it to a team member.

Security permissions for the People tab are as follows.

- **View People tab**.
- **Edit Team Members, Roles, and Access Levels**.
- **Assign Work by Role**. Users with this permission can also access the Assign Work by Role and Find/Replace dialog boxes.

Users with **View People tab** and **Edit Team Members, Roles, and Access Levels** permissions can automatically add members and member roles on workflow spreadsheets without adding them to the People tab first.

Notes on managing project members

- To assign an unlisted role, create it using the List Definitions section of the Administrative Settings if you have proper permission to access this item.
- The list of people in the Folders section of the Select Project Members dialog box is populated from IBM Unica Marketing Platform, and may be limited based on your role and permissions. For details, consult your IBM Unica Marketing Operations administrator or the *IBM Unica Marketing Platform Administrator's Guide*.

  The list of teams in the dialog box is based on the teams that have been defined in Marketing Operations. As with the list of people, the teams you can view may be limited based on your role and permissions.
- The email address appears only if this information has been entered for the user in the platform.
- You cannot remove project members (or roles) who have tasks assigned to them. You must remove them from all future work before removing them from the project.
- In the Project Members column, teams are in italics and are preceded by the icon. Individuals are preceded by the icon.

To manage project members

1. Navigate to the **People** tab of the project.
2. Click the Edit Member/Role Settings icon ( ).

   The **Select Team Members** dialog box opens.
3. Do one of the following.
   a. To add a person or team, select the name from the left pane of the dialog, and click **>>**.
   b. To remove a person or team, select the name in the **Select Team Members** list box and click **<<**.
   c. To change the role for a person or team, select the name in the **Select Team Members** list box and use the **Up** and **Down** buttons to move them to the required role.

   Note that you cannot remove a user or team assigned to a task.
4. Click **Save Changes**.

   The **Select Team Members** dialog box closes. The **People** tab becomes the active window.

The changes you have made are reflected in the list of people and roles. For example, if you added a creative lead, the screen would contain a line similar to the following.

```
Member/Access Level         Role              Email Address
```

```
P Picasso (participant)        Creative Lead    ppicasso@unica.com
```

Managing teams

Selecting **Operations > Teams** opens the My Teams page. Use this page to do the following.

- Create and remove teams
- Assign team managers and members
- Set the work routing model
- Enable and disable teams

These groups of people are available across templates and object instances. Project Managers can assign tasks to teams, in addition to being able to assign them to individual members.

Note that wherever you can assign or work with individuals, you can also work with teams. For example, the procedure "To assign people to roles" can be used to assign individuals or teams to roles.

About team alerts

Plan sends alerts for team-related events in the same way it sends alerts to individuals.

Additionally, alerts have the following behavior as applied to teams:

- For tasks assigned to a team, all the team members and managers receive the alert
- After a task is assigned to a team member, only the member and managers receive the alert

For the following events, only the specific team member affected by the event receives the alert

- A member is added to the team
- A member is removed from the team
- A team-task is assigned to a member of the team
- A team-task assigned to a user is reassigned back to the team or to another member

Team summary page

When you first navigate to a team, its summary page appears. This page contains the following items.

Field	Description
Name	Displays a name for the team. This name appears on the Teams list page, as well as selecting project members or reviewers. This field is required.
Description	Displays a short description for the team.
Skill Sets	Displays a list of skills associated with the team. Add terms here that might be useful when describing teams. For example, you can enter **Photoshop** as a skill, so that anyone viewing the team knows the team has this skill.
Suggested Security Policies	Displays the security policy or policies that apply to the team. This field is required.
Routing Models	Check any combination of the work routing option check boxes.
Members and Managers	Displays the managers and members of the team. Use the scroll bar to page through the list.

From the Team Summary screen, you can perform the following actions.

Action	Details
Edit the team	Edit the attributes for the team and members by clicking the **Edit** icon ( ).
Change alert subscriptions	Click the **Manage** icon ( ) and select **Set Alert Rules** to change the way team members and managers are notified of task assignments.
Delete the team	Click the **Delete this Item** icon ( ) to remove the team.
Copy the team	Click the **Manage** icon ( ) and select **Create a duplicate Team** to create a copy of the team. The system opens the summary page of the new team in edit mode.
Add a team	Click the **Actions** icon ( ) and select **Add Team** to add a new team.

Action	Details
Navigate back to the Teams list page	Click **All Teams** or **My Teams** in the breadcrumb; either or both of these links are displayed, depending on how you navigated to the current summary page. Or, click the Action icon ( ) and select **All Teams** or **My Teams**.
Print team details	Click the **Print** icon ( ) to print the details of the team.

To add or edit teams

If you have the proper security permissions, you can add or edit teams.

1. Select **Operations > Teams**.

   The Teams list page appears.

2. Do one of the following.

   - To create a new team, click the **Add Team** icon ( ).
   - To edit an existing team, click a team to display its summary page, then click the **Edit** icon ( ).

3. Complete the fields on the Team summary page.
4. Click **Save Changes** to save your changes to the team.

To edit members of a team

If the people you need to add to a team do not appear in Select Team Members and Roles, you must add them as IBM Unica Marketing Operations users in IBM Unica Marketing Platform.

You can set team members and managers when you create a team. Additionally, you can edit the members of a team any time during its existence.

1. Select **Operations > Teams**.

   The Teams list page appears.

2. Click the team to edit from the Teams list page. To edit a team that is not listed, click **All Teams** to display all available teams. If it is still not visible, you may not have the proper security permissions to view it.

   The Teams summary page appears.

3. Click the **Edit** icon ( ).

4. Click **Add/Remove Managers and Members**. The Select Team Members and Roles page appears.
5. Move people into and out of the team as appropriate.

About routing work for teams

When you edit a team, you can choose how tasks, approvals, and project requests are routed for that team.

Related Topics

- Task routing options
- Approval routing options
- Request routing options
- Virtual project participants

Task routing options

You can check any of the following options under the Task Routing Model section of the Team summary.

- **Managers can route work to members**

  Tasks assigned to the team appear on the team manager tasks page. The manager can then assign these tasks to team members.

- **Members can accept team-assigned tasks**

  Tasks assigned to the team appear on the My Tasks page for each team member. Team members can then assign a task from the list to themselves.

- **Members can return team-assigned tasks back to the team**

  Members have the ability to return their tasks back to the team.

When you set up a team, you must select one or both of **Managers can route work to members** and **Members can accept team-assigned tasks**.

To view team tasks, you must apply either the All My Team Tasks or All My Teams Unassigned Tasks filter from the Tasks list page.

The task routing options function independently, and you can choose any combination for the team. For example, if you need a team where the manager can assign tasks to members, and members can return assigned tasks back to the unassigned queue select **Managers can route work to members** and **Members can return team-assigned tasks back to the team**. If you need a team where the manager can assign tasks to members, but members cannot return assigned tasks back to the unassigned queue, set only **Managers can route work to members**.

Approval routing options

IBM Unica Marketing Operations provides the same routing options for both task approvals and stand-alone approvals as for standard tasks. Just as for standard tasks, a team can have any combination of options for routing approval tasks.

You can check any of the following options under the **Approval Routing Model** section of the Team summary.

- **Managers can route approvals to members**

  The manager can assign these approval tasks to team members.

- **Members can take ownership of team-assigned approvals**

  Team members can then take ownership of these approval tasks.

- **Members can return team-assigned approvals back to the team**

  Members have the ability to return their approval tasks back to the team.

When you set up a team, you must select one or both of **Managers can route approvals to members** and **Members can take ownership of team-assigned approvals**.

Request routing options

IBM Unica Marketing Operations provides similar routing options for project requests as for tasks. You must select at least one of the following options under the **Project Request Routing Model** section of the Team summary.

- **Managers can route project requests to members**

  The manager can assign these requests to team members.

- **Members can accept team-assigned project requests from the team.**

  Team members can take ownership of these requests.

- **Members can return team-assigned project requests back to the team**

  Members can return requests they had previously accepted

Related Topics

- Task routing options

Virtual project participants

If a user is a member of a team that participates in a project, but the user is not a participant of the project, the user can see team tasks assigned for the team, and be assigned such tasks. Additionally, such a user can view the project and all of its tasks.

Consider the following scenario.

- Don is a member of the **Major Accounts** team.

- The Major Accounts team has **Members can accept team-assigned tasks** enabled.
- The Major Accounts team is assigned in the Members column of the *Handouts – design* workflow task for the Fall 2007 Tradeshow project.
- Don is **not** a project member for the Fall 2007 Tradeshow project.

Even though Don is not a member of the Fall 2007 Tradeshow project, he can view and update the **Handouts – design** task, by navigating to his All My Team Tasks page and selecting the **Handouts – design** task. In this case, Don is a *virtual participant* for the Fall 2007 Tradeshow project, and can view all of its project and task information.

Assigning team tasks

Depending on the work routing options, team managers can assign tasks to team members, or members can pull tasks off the queue themselves.

- If the team has the **Managers can route work to members** option enabled, team managers can assign tasks to team members.
- If the team has the **Members can accept team-assigned tasks** option enabled, team members can assign themselves any unassigned team tasks.
- If the team has the **Members can return team-assigned tasks back to the team** option enabled, team members can return tasks assigned to them back to the pool of unassigned team tasks.

1. Select **Operations > Tasks**.
2. Click the **Actions** icon () to display all saved searches/filters for tasks.
3. Choose one of the following searches.
   - To display all tasks assigned to the team, grouped by assignment, click **All My Team Tasks**.
   - To display all tasks assigned to the team that are not assigned to any team members, click **All My Team Unassigned Tasks**.

   You cannot reassign tasks from the All Tasks page. To reassign tasks, select another filter; for example, All My Team Tasks.

4. Check the boxes for all the tasks to assign. Note that you can check the box for the **Name** column to select all listed tasks.

   The Reassign Selected page appears. If you do not have permission to assign the selected tasks, the page contains a message to this effect.

5. For each selected task, select a team member for the assignment in the **Assign To** field.

   Team members can only assign tasks to themselves or back to the team.

6. Once you have made all the assignments, click **Save Assignments** to save your changes and close the page.

Assigning team requests

You must have permissions to assign a team to a project request.

1. Go to the **People** tab of the project and click the **Members/Roles** icon ( ).

   A dialog box opens listing teams and team members to assign.

2. Select a role in the **Selected Members and Roles** area, and move a team from the list of teams and team members to assign that team or team member to the selected role.

   If you assign a team member to a role, the team is not automatically assigned.

To change the access level for a project member

While all IBM Unica Marketing Operations objects have access levels, it is useful to change access levels for projects only.

1. Navigate to the people tab of the project.

2. Click the **Change Member Participation Level** icon ( ).

   This icon is unavailable unless you have the proper security permission. Typically, project owners and IBM Unica Marketing Operations administrators have this permission, but it may be assigned differently depending upon the security policy for the project.

   The Change Member Participation Level page appears.

3. In the **Selected Team Members** list box, select the member who has an access level to change.

4. Use the **Up** or **Down** buttons to move the member to the new access level.

5. Repeat Steps 3–4 as necessary.

6. Click **Save Changes**.

The Change Member Participation Level dialog box closes, and your changes are applied. The people tab becomes the active window.

Note the following.

- The list of people in the Folders section of the Change Member Participation Level page is populated from IBM Unica Marketing Platform, and may be limited based on your role and permissions. For details, consult your IBM Unica Marketing Operations administrator or the *IBM Unica Marketing Platform Administration Guide*.

  The list of teams in the dialog box is based on the teams that have been defined in Marketing Operations. As with the list of people, the teams you can view may be limited based on your role and permissions.

- You can also use the **Change Member Participation Level** link to add users to the project. They are added with the selected access level and placed by default into the Unassigned role.
- Access levels are associated with objects, and cannot be created or removed. For example, approvals always have two access levels: owner and approver.

Finding and replacing task members or reviewers

Once you click the **Find and Replace Task Members** icon ( ) or the **Find and Replace Task Reviewers** icon ( ), the Find and Replace Task Members or Find and Replace Task Reviewers dialog appears.

You can replace any member or reviewer with any other current member of the project. To replace with someone not on the project list, you first need to add that person to the project. Note that this applies only to owner-assigned task members and reviewers. To remove a member or reviewer assigned by an administrator when a template was created, you must go to the approval and remove them, assuming you have permissions to do so.

When accessing the Find and Replace Task Members/Reviewers page, the project Workflow is locked; any other user who attempts to access it receives a warning message, indicating the workflow is currently in use.

The following table describes some uses for the search and replace functionality.

Goal	Select	Replace with
Accommodate out of office situations: Replace a given person, in a given role, for a specified date range (for all tasks occurring during that date range), with another user.	task member/reviewer = Karen role = Project Manager tasks between 11/1/2005 and 12/1/2005	Mary Manager
Switch specific resources: replace a given user in a given role, with another user, for all tasks in the project.	task member/reviewer = Karen role = Project Manager	Connie Contact
Switch specific users: replace a given user, anywhere on the project, regardless of role.	task member/reviewer = Karen role = Any Role	Mary Manager
Add a backup to a role: add an additional person to a role, as a backup or additional resource.	task member/reviewer = Karen role = Project Manager	Connie Contact

Goal	Select	Replace with
Assign tasks to a role: newly assign a given user to tasks, by role.	task member/reviewer = Any User role = Project Manager	Mary Manager

This page contains the following sections.

- **Filters**: Allow you to filter the search by role, task member, or a date range. Filters are located at the top of the page.
- **Buttons**: Allow you to preview and update the search. The buttons are located at the center of the page.
- **Search results**: Displays tasks that meet the search criteria. Use it as a preview of the tasks that will be changed if you click **Update All Occurrences**.

Filters

Use the top-most fields in the Find and Replace Task Members/Reviewers dialog to filter the results. You can search by role, task member, or project date ranges.

Field	Description
Task member or reviewer is	Enter the name of the member to replace. This drop-down lists all team members and reviewers on the project. It also contains a choice for **any user**; this is the default.
Role is	Enter the role of the task member to replace. This drop-down list contains all roles in the project, and also contains a choice for **any role**, which is the default.
Date Constraint	Check this box to search using a date range. If selected, you can choose the following information. • Type of task: fill in the **for tasks** box with the type of date to search, either forecast or target. • Range: choose dates for the search range.
Status	Select the status on which to filter. You can choose Pending/NotStarted, Active/In progress, or both.
Replace with/ Add this task member	Select one of the radio buttons, depending on whether to replace or add members/reviewers. Then, enter the person you want to fill the selected role on the tasks in the search results.

Buttons

Button	Description
Find All Occurrences	Preview search results. You can view the list of tasks that meet your search criteria in the Search Results area of the page.
Update All Occurrences	Update members, once you have confirmed the list of tasks is correct. We suggest you click **Find All Occurrences** before doing the update.
Cancel	Close the page without making any changes.

Select project members/reviewers

The Select Project Members page appears when you are adding or removing project members, and the Select Reviewers page appears when you are adding or removing reviewers.

You may see only a subset of the people and teams available in IBM Unica Marketing Operations, since your organization can limit the view of available resources.

Field	Description
Folders	Displays a list of users you can choose from. • The list of people is set up by an administrator in IBM Unica Marketing Platform. • The list of teams is based on the teams that have been defined in IBM Unica Marketing Operations.
Roles	Displays a list of roles in your system. It is set up by an administrator and contains all the roles defined in IBM Unica Marketing Platform and IBM Unica Marketing Operations template files. In the Select Project Members or Select Reviewers page, use the Roles tab to add roles for the members and reviewers.
Selected Project Members / Reviewers	Displays the current list of members or reviewers for the project. You can move people and roles to and from the list, as well as reordering them by using the buttons.

An asterisk (*) next to a role indicates the role is used in the workflow, and therefore cannot be deleted.

To manage reviewers

Reviewers are different from project members because they do not have access to the project. The reviewer roles and users are defined in the people tab to be used in the workflow, mostly for approval tasks.

Use the Select Reviewers page to perform the following tasks.

- Add a reviewer
- Remove a reviewer from the project
- Change the role for a reviewer

1. Navigate to the project's people tab.
2. Click the **Reviewers/Roles** icon ().

   The Select Reviewers dialog box appears.
3. In the Selected Reviewers list box, select a person or team.
4. Do one of the following.
   - To add the person or team to the project, select them from the left pane of the page, and click **>>**.
   - To remove the person or team from the project, click **<<**.
   - To change the role for a person or team, use the **Up** and **Down** buttons to move them to the required role.
5. Click **Save Changes**.

The Select Team Reviewers dialog box closes and your changes are applied. The people tab becomes active.

Editing access levels for a member

IBM Unica Marketing Operations is a collaborative tool, and people using the software may need varying degrees of access to projects. Marketing Operations accomplishes this, in part, with the ability to assign project members different **object access roles**, sometimes called access levels.

Access levels are default roles that exist for different types of objects. For example, a project has owner, participant, requester, and approver. A request has owner and recipient. While the names of the object access roles are fixed, the security permissions granted by them depends on the security policy assigned to the object.

IBM Unica Marketing Operations objects contain the following access levels.

Access level	Description
Owner	All object types have owners, usually the person who created the object. Owners can typically perform any function associated with an object, such as adding members to the team or editing the properties of the object.
Participant	Can typically view the object, but not edit it. For projects, when a project is created using the wizard, all members added to the project become participants by default.
Requester (projects only)	Can typically view the project, but not edit it. If you create a project from a request, the owner of the request becomes the requester of the project.
Recipient (requests only)	Can accept or return a request. A requester submits a request to the recipient, who then decides what to do with the request.
Approver (approvals only)	Can approve, deny, or suggest changes to an approval assigned to them.

Sometimes, a project owner needs to change the access levels of a member or members. For example, after assigning people to roles, there are many people with the Participant access level. You can grant some of them owner-level access or deny some of them even participant privileges.

About roles

Ask your IBM Unica Marketing Operations administrator if you need help with permissions.

- **View People tab**. Users with this permission can view the People tab.
- **Edit Team Members, Roles, and Access Levels**. Users with this permission can edit members, roles and access levels
- **Assign Work by Role**. Users with this permission could assign tasks to roles and people, and access the Assign Work by Role and Find/Replace dialog boxes.

To assign work by role

Typically, at the beginning of a project, the project owner or manager assigns work to the members of their team. The section describes how to perform this task for owner-assigned approvers (as opposed to those assigned in the template).

1. Click the **Assign Work By Role** icon ().

If the project has been started, a warning dialog box appears; click **OK** to proceed or **Cancel** to cancel the assignment process.

The **Assign All team members and reviewers to their respective tasks** page appears.

2. Select one of the following.
   - Select **append the new user** to add members to the existing assignments.
   - Select **replace the existing assignment** to replace anyone currently in a role.
3. Click **OK**.

   A confirmation dialog box appears.
4. Click **Close**.

In the workflow, all users assigned to roles are also assigned to the tasks associated with their role.

Note the following when you assign work.

- When you access the **Assign All team members and reviewers to their respective tasks** dialog, the project Workflow is locked; that is, any other user who attempts to access it receives a warning message, indicating the workflow is currently in use.
- Only tasks with a status of **pending** have people assigned to them when performing this task; all other tasks remain unchanged.

To remove a role

If you are removing a role, note the following.

- If you delete a role that has people or teams assigned to it, they are not removed from the project; they are reassigned to the Unassigned role.
- The Unassigned role cannot be removed.
- You cannot remove a role that has work assigned to it. You must first either assign a person or team to that role, or assign the work to a different role.
- You cannot remove a user who is assigned to a workflow task.

1. Navigate to the project's People tab.
2. You can remove a member or reviewer role.
   - To remove a member role, click the **Members/Roles** icon ( ).
   - To remove a reviewer role, click the **Reviewers/Roles** icon ( ).
3. Select a role to remove, and click **<<**.

   If the role selected for removal has people or teams assigned, a warning dialog box appears. Click **OK** to remove the role, or **Cancel** to keep it.

4. Click **Save Changes**.

The Select Project Members/Reviewers dialog box closes. The People tab becomes the active window. The changes you have made are reflected in the list of people and roles.

To add a role

Occasionally, a project owner or manager may realize the project needs another project role. For example, the organization could decide a certain project needs the Legal department to approve its collateral. If this role is not added when the project is created, the project owner can add it to the project later.

Note the following.

- The system **does** allow you to add a role that already exists in the project. Note, however, that this does not result in a duplicate or copy of the role.
- Permissions based on project roles can be configured at the template level only. You cannot configure custom security for project roles that are added to a project after the project was created.
- A project role must exist before you can add it to a project. To create a new project role, select **Administration** > **List Definitions** > **Roles** (note that you must have the proper permission in order to access this item). Then you can add the role to your project using the steps described below.

1. Navigate to the project's People tab.
2. You can add a member or reviewer role.
   - To add a member role, click the **Members/Roles** icon ().
   - To add a reviewer role, click the **Reviewers/Roles** icon ().
3. Click the **Roles** tab in the list box on the left side of the page.
4. Select a role to add, and click **>>**.
5. Click **Save Changes**.

The Select Project Members/Reviewers dialog box closes. The People tab becomes the active window. The changes you have made are reflected in the list of people and roles.

To assign people to roles

Before you can complete this task, the workflow must have been set up with the necessary approval and workflow tasks, and a role assigned to each task that should have one. This occurs when the project is created from a template that contains this information. If not, you must first add roles to the project or task.

Note the following.

- Administrators create roles using the List Definitions section of the Administration menu item.
- The list of people in the Folders section of the Select Project Members page is populated from IBM Unica Marketing Platform, and may be limited based on your role and permissions. For details, consult your IBM Unica Marketing Operations administrator or the *IBM Unica Marketing Platform Administration Guide*.
- Administrators may define assignments using the Request tab of the template. Therefore some roles may be pre-assigned.
- The list of teams in the Select Project Members page is based on the teams that have been defined in Marketing Operations. As with the list of people, the teams you can view may be limited based on your role and permissions.

1. Navigate to the People tab of the project.
2. You can assign work to project members or reviewers.
    - Click the **Members/Roles** icon () to add project members.
    - Click the **Reviewers/Roles** icon () to add reviewers.

    The Select Project Members or Select Reviewers dialog box appears.
3. **The template used to create the project may contain the necessary roles. If so, skip this step.** Click the Roles tab on the left side of the dialog and add all the roles you might need for the project.
4. In the Selected Team Members/Reviewers list box, select the role you will be assigning.
5. Click the **Folders** tab, and navigate to the person or team to assign.
6. Select the person or team and click >>.

    The selected person or team is assigned to the selected role.
7. Repeat Steps 4–6 until each member and reviewer role has at least one person or team assigned to it.
8. Click **Save Changes**.

The Select Project Members/Reviewers dialog box closes. The People tab becomes the active window.

9 The calendar

About the calendar

Marketing organizations typically organize their work around calendars. For example, seasonal events drive marketing programs, as well as other external dates, such as store openings, seasonal product announcements, and so forth.

Historically, organizations have produced paper-based calendars and have updated them with the latest calendar-driven data. The calendar functionality provides marketing groups with an electronic means of viewing and updating this data.

You can customize the appearance of the calendar in the following ways.

- You can set your default view of the calendar by using the **Calendar/Timeline Settings** screen.
- You can choose the look of the calendar by using the Set View Options dialog box.
- You can filter the items displayed on the calendar by using Advanced Search functionality of IBM Unica Marketing Operations.

Related Topics

- Setting the appearance of the calendar
- To set your basic options
- To change your view of the calendar

Configuring display options for the calendar

Selecting **Marketing Operations > Calendar** opens a time-centric view of your business processes. When you view the calendar, its appearance depends on several options that you (or your administrator) have previously set:

- Set the default calendar view: Use the Calendar/Timeline Settings page in the Administrative Settings to set the default appearance for the calendar.

- Set the initial calendar view: After setting the Calendar options, you can change the initial view by clicking the **View** icon ( ) on the Calendar page.
- Toggle between calendar views: You can use the **View** icon ( ) on the Calendar page to choose from timeline or calendar views, as well as the time range displayed.

The **View** icon ( ) is also available from the Projects, Programs, Plans, and Tasks list pages.

Related Topics

- To set your default calendar options
- To change your view of the calendar
- Viewing the text or graphical calendar

Setting the appearance of the calendar

You can set the appearance of the calendar in either of two ways.

- You set your initial and default view of the calendar.
- You can change most of the options while viewing the calendar.

Use the Calendar/Timeline Settings page to set these parameters.

Field	Description
Include Weekend Days	You choose whether the calendar shows a five-day week or a seven-day week by specifying this option. Select **Yes** to display a seven-day week.
Weeks Should Be-gin On	You can specify whether the calendar displays Monday as the first day or Sunday as the first day, even if weekends are shown on the calendar. Select either Sunday or Monday. Sunday is the default.
Default Content of Calendar Section	You can choose which objects to display on the calendar. Select one of the following. • Plans (the default) • Projects • Programs • Tasks

Field	Description
Default Search of Calendar Section	Allows you to choose the filter for the objects displayed on the calendar. Select a saved search to be the default when you click the Calendar menu item. The list of available items depends on which objects you selected for the Default Content field. For example, if you selected Projects for the default content, you could choose Active Projects for the default search.
Default Layout of Calendar Section	Allows you to choose from timeline or calendar views, as well as the time range displayed.

The following parameters are available on both the Calendar/Timeline Settings page and the Set View Options dialog box.

Field	Description
Display as and Time Scale	On the Calendar/Timeline Settings page, you choose the calendar view using the **Default Layout of Calendar Section** field. On the Set View Options dialog box, you use the **Display as** and **Time Scale** fields to perform the same action.
Enable Color Coding	Allows you to color code the calendar based on an attribute you select. This is a 2-step process: First, check the **Enable Color Coding** check box. Then, select the attribute to use for color coding the objects on the calendar.
When displaying tasks, only show milestones	Allows you to limit the amount of information when displaying tasks on the calendar. Check this box, then choose the milestone types to hide most tasks when displaying project tasks. Only the selected milestone types will be displayed.

The following option is available only on the Set View Options dialog box.

Field	Description
Brief/Detailed	Allows you to determine the amount of information displayed for tasks. This is available for tasks only.

To set your default calendar options

You set all available options for the calendar using the Calendar/Timeline Settings page. The settings you choose remain in effect between your sessions. That is, if you log out of IBM Unica Marketing, and then log back in later, your calendar appears with the options you last set on this screen

1. Select **Settings > Marketing Operations Settings**.
2. Click **Calendar/Timeline Settings**.

   The Calendar/Timeline Settings page appears.

3. Fill in the details on the Calendar/Timeline Settings page.
4. Do one of the following:
    - Click **Save Changes** to save your changes.
    - Click **Revert to Saved** to discard your changes, and reload the settings from your previous save.
    - Click **Cancel** to exit the page.

Related Topics

- Setting the appearance of the calendar

To change your view of the calendar

You can access the different views of the calendar by clicking the **View** icon () on the Calendar page.

1. Select **Operations > Calendar**.

    The calendar appears in the default view. This view depends on settings in the Calendar/Timeline Settings page.

2. Click the **View** icon (). The Set View Options dialog box appears.
3. Fill in the details on the Set View Options dialog box.
4. Do one of the following:
    - Click **Apply** to view your changes.
    - Click **Reset** to discard changes.
    - Click **Close** to exit the screen and keep your changes.

Your changes are applied. However, unlike the Calendar/Timeline Settings page, the changes you make here do not persist. Once you leave the Calendar page, your settings return to the default values.

Related Topics

- Setting the appearance of the calendar

Viewing the timeline

If you choose a timeline view, you can choose from several date ranges; the screen can display a single week’s data all the way up to an entire year’s worth of data.

Related Topics

- About timeline view of the calendar
- About horizontal bars on the calendar

About timeline view of the calendar

This view displays a grid-like view of the objects (Projects, Programs, or Plans) you selected and filtered (for example, Active Projects) by some unit of time, depending on which timeline view you selected.

Each object is displayed in a horizontal bar across its date range. The name of the object displays on the bar.

If you select **Enable Color Coding** from the calendar view options screen, each object's bar appears in a color based on an attribute you chose.

Choose a date-range for the timeline.

- **Week**: displays one week, with each day listed as a column. The starting day is either Sunday or Monday depending on the option selected in the Calendar/Timeline Settings screen.
- **Month**: displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.
- **Quarter**: displays three calendar months. Each week is listed as a column, and those weeks are grouped into months.
- **Fiscal Year**: displays a fiscal year (starting month depends on a configuration setting, `firstMonthInFiscalYear`). Each month is listed as a column, and the months are grouped into quarters.
- **Calendar Year**: displays a calendar year (starts in January and ends in December). Each month is listed as a column, and the months are grouped into quarters.

Any day that has been specified as non-work time has its column grayed out. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date. This feature is not available when the time scale is Quarter, Fiscal Year, or Calendar Year.

Viewing the text or graphical calendar

The calendar views display data for a selected month. The page displays a grid containing a column for each day of the week: either five columns representing the weekdays, or seven, if you have chosen to display weekend days. You set this option on the Calendar/Timeline Settings page.The page contains either five or six rows, each representing a week.

The view contains a cell for each day of the selected month. The cell for a day contains either a list of items active on the day (text) or a portion of a horizontal bar for each active item (graphical).

Related Topics

- About the monthly calendar
- About timeline view of the calendar
- About calendar color coding
- About horizontal bars on the calendar
- Brief and detailed views of tasks

About the monthly calendar

This view displays a calendar of the selected month. It lists the objects (Projects, Programs, or Plans) you selected and filtered on (for example, Active Projects).

Choose either of two, monthly, calendar views.

- **1-Month Text**: Each day contains a list of objects. An object is displayed for all days in its date range.
- **1-Month Graphical**: Each object is displayed in a horizontal bar that begins on its start date and ends on it end date. If you select **Enable Color Coding** from the calendar view options page, each object's bar appears in a different color.

Any day that has been specified as non-work time is indicated by a gray X in the background. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.

About calendar color coding

You can display objects in a color-coded manner on either the graphical calendar or in the timeline views.

You first select the **Enable Color Coding** check box in the either the Calendar/Timeline Settings page or the Set View Options dialog box. After you check the box, the **Based on values for** drop-down menu displays. This list contains attributes for your projects, programs, or plans (depending on which objects you are currently displaying in the calendar).

From this list, you can choose any attribute that is an enumerated type. For example, consider the following attribute:

- Name: Product Family
- Valid values: CDs, Credit Card, Home Mortgage

If you choose to group objects by this attribute, your calendar contains four colors: one for each valid value, plus **N/A**, corresponding to any objects that do not contain a value for the Product Family attribute.

The calendar also displays a legend in the lower-right corner of the screen. The legend lists all valid values (plus **N/A**) along with the color corresponding to that value.

You can also color code by the template on which the project or program is based.

About horizontal bars on the calendar

The timeline view and graphical calendar view display horizontal bars.

Note the following.

- The bars represent the date range for objects displayed on the calendar.
- The name of the object displays on the bar.
- The bars may be colored based on an attribute you select.
- The shape of the bars indicate the following:
  - Rounded-end “start”: indicates the object starts on the date where the bar has a rounded end.
  - Rounded-end “end”: indicates the object ends on the date where the bar has a rounded end.
  - Flat-end “start”: indicates the object starts prior to the visible date range.
  - Flat-end “end”: indicates the object ends after the visible date range.

Brief and detailed views of tasks

Use the Set View Options dialog box or the Calendar/Timeline Settings page to choose brief or detailed view of tasks on the calendar.

In brief mode (the default), the text displayed contains the following items.

- Task ( ) or approval ( ) symbol
- Task ID
- Name of the task

In detailed mode, the text displayed contains the following items.

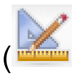
- Task ( ) or approval ( ) symbol
- Name for the project that contains the task
- Code for the project that contains the task
- Task ID
- Name of the task

To publish the calendar

To get a snapshot of the current calendar, save it in HTML format (into a ZIP archive file).

1. Choose the calendar view to publish.

   Select the objects, time range, and appearance for the calendar view. You can do this in either of the following ways:

   - From the **Operations** menu, select **Calendar**, then select items to view.
   - At a list page for plans, programs, projects, or tasks, click the View icon () and choose a calendar view.

   If the current calendar view includes projects, Project data is exported as well. The exact data exported depends on how the project template was set up; Summary and custom tabs may be exported for some or all projects.

2. Click the **Print** icon () and select **Export**.
3. Do one of the following.
   - Click **Open** to open the ZIP file of the calendar.
   - Click **Save** and choose a location, to save the calendar to disk.
   - Click **Cancel** to return to the Calendar page without publishing.

The system publishes the calendar into a ZIP file archive. You can use any application for working with ZIP files to access the calendar HTML pages. Note that you can navigate to the next and previous pages of the calendar view in your web browser. If you exported any project data, you can also navigate to that data from the calendar HTML pages.

10 Grids

About grids

A grid is a spreadsheet-like presentation of data. Grids allow IBM Unica Marketing Operations users to store all campaign- and project-related data within the project.

With grids, users no longer need to search through e-mail, a file folder, or another computer to find information about a campaign or project. IBM Unica Marketing Operations serves as the system of record and offers enterprise-wide access to data stored in grids. Any Marketing Operations user who has access to the project can view and edit the grid, if he or she has appropriate security permissions.

Users can move the traditional spreadsheet information into a grid within IBM Unica Marketing Operations. Then, marketing managers can analyze, measure and report on the project- and campaign-related information within and across multiple projects or campaigns.

Depending on how your templates are defined, you may find grids on marketing object, plan, program, and project tabs. Campaign projects include a TCS tab that displays a special grid called the Target Cell Spreadsheet. You can create campaign projects only if IBM Unica Marketing Operations–Campaign integration is enabled.

A template creator configures grids, specifying the data source, whether data is grouped, whether a user can sort the data, and other grid characteristics. Then, administrators and users can use them when they create marketing object tabs and project tabs.

A grid can also be read-only, displaying data that you cannot edit.

About editing grid data

When you work with grids in edit mode, you can add rows, delete rows, and edit existing data. In a single editing session, you can perform all of these tasks if you have the proper permissions.

Permissions

You must have the following permissions to work with grids. Ask your administrator if you need help.

- To add a row, you must have the **View Tab**, **Edit Tab**, **Edit Grid**, and **Add Grid Row** permissions for the tab with the grid.
- To edit a row, you must have the **View Tab**, **Edit Tab**, and **Edit Grid** permissions for the tab with the grid.
- To copy and paste a row, you must have the **View Tab**, **Edit Tab**, and **Edit Grid** permissions for the tab with the grid.
- To delete a row, you must have the **View Tab**, **Edit Tab**, **Edit Grid Row**, and **Delete Grid** row permissions for the tab with the grid.

Locked data

The system prevents you from editing a row that is currently being edited by another user. For a Target Cell Spreadsheet, the entire grid is locked for editing instead of individual grid rows.

Revision history

Marketing Operations maintains an audit log for grids. The audit log contains the user details and the time it was saved. This information is available on the Analysis tab.

Grid controls

The following tables describe the controls you use when working with grids in the View and Edit modes.

The following features are available in both modes.

- Data is displayed in pages. To navigate, you can click arrows to go to the next, previous, first, and last pages, or you can enter a number in the box and press **Enter**.
- You can sort by column by pointing to the column heading, clicking the down arrow, and selecting **Sort Ascending** or **Sort Descending** in the drop-down menu. Note that some columns may have sorting disabled, depending on how the grid was designed.

- You can view or hide columns by pointing to any column heading, clicking the down arrow, pointing to **Columns** in the drop-down menu, and selecting or clearing the check box next to the column name.
- You can reorder columns by dragging and dropping the column heading. (This ability is not available in grids that have column grouping.)
- You can change column width by dragging the edge of the column headings.

View mode

Control	Description
	Switch to Edit mode.
	Copy selected grid rows. Click in the first column to select a row.
	Import a CSV file that contains grid rows.
	Export all the data in the grid in a comma-separated list.
	Use advanced search to filter grid data.
	Select the calculation used for each column in the Summary row. The options are: Sum, Avg (average), Min (lowest value in the column) and Max (highest value in the column). In a multi-page grid, calculations are performed across all the data, not just for individual pages. This control is available only in view mode.
Save Preferences	Save your customized view of the grid.
Approve All	Approve all the rows in the TCS. This control is available only for TCS grids.
Deny All	Deny approval to all the rows in the TCS. This control is available only for TCS grids.
Clear All	Delete all the rows in the TCS. This control is available only for TCS grids.
Publish	Send the current TCS data to Campaign so the flowchart designer can access it. This control is available only for TCS grids.
Get cell status	Retrieve the latest flowchart and cell count information from Campaign. This control is available only for TCS grids.

Edit mode

In edit mode, you can click single line text, multi-line text, numeric and money type column contents and begin typing to overwrite existing data. For any editable column, you can double click a cell to bring up the content editor for that column type.

If the row is currently in use by another user, the system displays a message to let you know you cannot edit that row. Before you save your changes, cells you have edited contain a small red triangle in the corner; these markers disappear after you save.

Control	Description
	Add a new row. The row is added below the currently selected row. The first row is selected by default when you enter edit mode.
	Copy selected grid rows. To select a row, click in the first column.
	Paste grid cells and rows.
	Mark a selected row for deletion. The row is deleted when you save. Within a row, the same icon indicates the row status.
	Un-mark a selected row for deletion. Within a row, the same icon indicates the row status.
	Save your changes and remain in edit mode.
	Save your changes and return to view mode.
	Revert all changes you have made since your last save and return to view mode.

To import grid data

To quickly add data to a grid, use the import functionality. You can import data to a grid in comma separated values (.csv) format.

1. Navigate to the grid for the import.
2. Click .
3. Browse to the CSV file that contains the data to import.
4. If the first row of the file contains header information, select the **First row is header row** box.

   The confirmation screen appears.
5. Click **Save** to import the file or **Cancel** to quit the import process.

   If the CSV data does not match the number and data type of the grid columns, you receive an error message. The message describes the differences between the grid and the CSV file.
6. Click **Finish** to close the dialog and return to the grid tab.

To export grid data

You can export grid data in comma-separated values (.csv) format. Note the following.

- All pages (if the data is paginated) are exported.
- All rows except the Summary row are exported.
- All columns (including hidden columns) are exported.
- Exported rows are in the same order as in the current view. If you are viewing the grid alphabetized by ID, the exported data is also alphabetized by ID.

1. Navigate to the grid to export.
2. Click .
3. In the File Download dialog box, choose one of the following.
   - Click **Open** to display the file in Microsoft Excel.
   - Click **Save** to save the file to disk.
   - Click **Cancel** to close the dialog box without exporting the data.

To post read-only grid data to a URL

If the template creator has enabled a read-only grid for data posting, the screen contains a **Post Data** link.

1. Navigate to the read-only grid whose data you want to post.
2. If the grid contains more than one page, click **Show All** to view the entire grid on the screen.
3. Check the box for each row you want to post.

   As a shortcut, you can check the box in the grid header to select all currently displayed rows.

4. Click **Post Data**.

   Marketing Operations calls the specified URL with the selected data.

To group read-only grid data

If the template creator has enabled data grouping for a read-only grid, you can group the grid's data by any of its columns.

1. Navigate to the read-only grid you want to view.
2. Click **View**.

   Set View Options appears.

3. Check **Enable Grouping**. To turn off grouping, clear this field.
4. In the **Group By Column** field, select the column for grouping.
5. Click **Apply** to save your changes and close the dialog box.

11 Marketing objects

Marketing objects

You can create new marketing objects if you have permission to do so. Once you create a marketing object, you can start it at any time. Starting the marketing object makes it active.

A **marketing object** is any work product a team develops and reuses in the course of its marketing activities. A marketing object can represent either a physical item, such as a letter, credit card, or banner ad, or a business component, such as a credit card offer, a target segment definition, or a rewards program definition.

- You define and manage marketing objects that represent all reusable work products.
- You can perform basic operations (create, edit, change state, copy, link, and delete) on marketing objects.
- You enter and manage all of the attributes that define a particular marketing object, such as name, owner, state/status, description, etc.
- You can define and manage business processes (such as projects) that produce, modify, and retire marketing objects.
- You can construct robust projects which define multiple marketing activities by “assembling” each discrete marketing activity from existing marketing objects.

IBM Unica Marketing Operations marketing objects are defined in stages, and how they are defined influences how they are organized and presented to users. The following terms are important in understanding the definition and organization of marketing objects.

Marketing object type

A **Marketing object type** is the highest-level division for marketing objects. An administrator creates marketing object types. Each marketing object type has a menu item, but the menu on which it appears depends on how the administrator configured the marketing object type.

Marketing object template

A marketing object type is broken down into one or more **marketing object templates**. Typically, an administrator creates a marketing object template for each significant characteristic for the marketing object type.

Marketing object instance

A **Marketing object instance** is a single marketing object. Users with the proper security permissions create marketing object instances from marketing object templates. Throughout the documentation, we refer to marketing object instances simply as “marketing objects.”

About the offer object type

If your system includes the IBM Unica Marketing Operations application only, your system administrators may have configured a custom marketing object type that represents offers or promotions.

If your Marketing Operations environment is integrated with IBM Unica Campaign, it includes a system-provided marketing object named "offer." However, there are two options for offer management:

- If your system is configured so that offers are managed through the Marketing Operations version of the feature, then you use the **Offers** option from the **Operations** menu. For information about creating offers in this way, see the *IBM Unica Marketing Operations and IBM Unica Campaign Integration Guide*.
- If your system is configured so that offers are managed through the Campaign version of the feature, then you use the **Offers** option from the **Campaign** menu. For information about creating offers in this way, see the "Offers" chapter in the *IBM Unica Campaign User Guide*.

Ask your system administrator which offer management option is configured on your system.

To create a marketing object

You must have the proper permission to add a marketing object. When you add a marketing object, you become an owner of that marketing object.

Marketing object types are specific to each organization. The marketing object types that are available to you and how they are organized on the menus depend upon your template creator.

1. From the menus, select the marketing object type that you want to create.

   The list page for that marketing object type appears.

2. Click the Creation icon.

   The **Select a Template** dialog box appears, containing all the templates available for this marketing object type.

3. Select a template and click **Continue**.

   The first step of the wizard for the selected marketing object template appears.

   Each marketing object can contain any number of custom pages and fields. All marketing object templates contain at least one page, with a name, membership list, and security policy field, as a minimum.

4. Follow the wizard by filling in the information on each page.

5. When you have finished configuring your object, do one of the following.

   - Click **Finish** to save the object. The system displays the list page for the marketing object type, with the new marketing object included in the list.
   - If you need to create another object that is similar to the one you have just created, click **Save and Duplicate**. The current object is saved, and you then see the Summary page of a new object, with data already populated. You should change the default name, and then you can edit the new object as needed.

About the marketing object cross reference report

All projects and marketing objects contain a report describing cross references to and from other marketing objects. This report appears on the Analysis tab, and is titled Marketing Object Cross-Reference.

For projects, the report contains the following sections.

- Marketing objects referenced by this project
- Marketing objects modified by this project

For marketing objects, the report contains the following sections.

- Marketing Objects that Reference This Item: other marketing objects containing a link to this marketing object.
- Marketing Objects that This Item References: other marketing objects to which this marketing object links.

- Projects that Modify This item: projects that can make changes to this marketing object.
- Projects that Refer to This Item: projects containing a link to this marketing object
- Approvals that Refer to This Item: approvals containing a link to this marketing object.

About the modifies and references relationships

Whether a project references or modifies a marketing object is determined by how the template creator configured the marketing object reference field.

- **Modifies**: The project or marketing object that contains this marketing object is intended to change or update the contents of a marketing object (a Change Order or Work Request project, for example).
- **References**: The project or marketing object that contains this marketing object does not modify it, but only references it.

Selecting marketing objects

When you select checkboxes on the Marketing Objects list page, IBM Unica Marketing Operations retains your selections during a session, as follows.

- In View mode, your checkbox selections are retained until you navigate to a list page for a different object. For example, if you make a selection on page 1 of a multi-page project list, go to page 2, and then return to page 1, either by clicking the page number at the bottom of the page or using the **Recent** menu, your selections are retrained. However, they are discarded if you navigate to the Tasks page.
- If you edit a marketing object by clicking the **Edit a Tab** icon on the list page, your selections are retained if you click **Save and Return to List**.

To delete marketing objects

You cannot delete a marketing object if a project or another marketing object is linked to it. You must first remove the link before deleting the marketing object.

1. From the menu, select the marketing object type of the marketing object that you want to delete.
2. Select the checkbox next to each marketing object that you want to delete.
3. Click the **Delete this Item** icon () in the left-hand toolbar.

4. When Marketing Operations prompts you to verify that you want to delete the marketing objects, click **OK**.

You can also delete a marketing object from its Summary tab. To do so, click the **Delete this Item** icon () in the Marketing Operations toolbar.

To change the status of marketing objects

Each marketing object type is assigned a status. The status of a marketing object changes during its life cycle. You can change the status of a marketing object, thereby controlling its life cycle.

1. From the menu, select the marketing object type of the marketing object whose status you want to change.
2. On the Marketing Objects List page, select the checkbox next to each item whose status you want to change.
3. Click the Status icon and select one of the available statuses. A dialog box appears in which you can add comments. If you select a status that cannot be changed later, the system warns you that your change cannot be undone.
4. Enter any comments, and click **Continue** to close the dialog box and apply the new status.

To add a marketing object reference to a form or a grid row

Forms and grids can contain columns that hold references to marketing objects. IBM Unica Marketing Operations makes it easy to find the specific marketing object to reference in such a column.

1. Navigate to a form or a grid that contains a field or column to hold a marketing object reference.
2. If the marketing object reference field is on a form, switch to the **Edit** tab.

   In the **Marketing Object** reference field, click **Select**.
3. For a grid, perform one of the following actions:
   - To add a new row: switch to Edit mode and click the Add Row icon. Then double click the **Marketing Object** column cell.
   - To edit an existing row: switch to Edit mode, then double click the **Marketing Object** column cell.

   A dialog box appears for the Marketing Object search.
4. Choose one of the tabs.

   - To perform a simple search for a marketing object: In the **Search** tab, enter search criteria. The system searches all of the marketing object attributes to match your criteria. Note that all attributes are searched except for attributes of linked marketing objects.
   - To use a predefined search for a marketing object: In the **Browse** tab, select a predefined saved search.

   The system returns the results of your search.
5. Select a marketing object and click one of the available buttons.
   - To accept the selected object and close the dialog box, click **Accept and Close**.
   - To accept the selected object and continue selecting objects, click **Accept**.
   - To close the dialog without choosing the selected object, click **Close**.

The marketing object you selected appears in the marketing object reference field. If you selected more than one object, and the field accepts multiple marketing objects, then all the objects you selected are listed.

Note the following.

- For simple searches, attributes of linked marketing objects are not searched.
- Fields that hold marketing object references can be set up so they are limited to holding one particular type of marketing object, such as Offer Letters. In this case, the Browse tab contains only those saved searches that apply to that particular marketing object type.

Related Topics

• To perform an advanced search (except for assets)

About marketing object references in approvals

You add marketing object references to approvals in the same way you add them to forms and grid fields. However, the search process is slightly different.

Simple search (Search tab)

The simple search screen in the marketing object selection box for approvals contains one extra drop-down list box. Use this box to filter the search to a particular marketing object type. You must select an entry in this box, or your search cannot proceed.

Saved search (Browse tab)

The drop-down list of saved searches contains all the saved searches for all enabled marketing object types in your system. For example, if you have Creatives and Envelopes, saved searches that apply to either Creatives or Envelopes appear in the list.

Related Topics

- To add a marketing object reference to a form or a grid row

12 Assets and asset libraries

Assets and asset libraries

IBM Unica Marketing Operations provides centralized management, secure storage, and web-based access for digital assets.

About Assets

In IBM Unica Marketing Operations, you store your assets in libraries.

- An asset library is the highest level organizational structure in the digital asset repository.
- You can access libraries and add assets to the libraries if your Marketing Operations administrator granted you permission in the security policy assigned to the asset).
- You can organize assets using folders.
- You can view all the assets that you own.

- If you do not own an asset, you can view it when it has a status of finalized.
- You must have administrative access to Marketing Operations to create a library.

You can view assets in a library in either a list view or thumbnail view. By default, IBM Unica Marketing Operations displays assets in a list view when you select an asset library.

View	Description
Asset List	Displays all the assets in the current library, listed alphabetically in ascending order. Change the order by clicking once on the **Name** column. To sort by any of the other columns, click that column. Click the column a second time to change the order of the column from ascending to descending.
Asset Thumbnails	Displays a thumbnail image for each asset in the library. Note that you can upload a thumbnail image for an asset when you add the asset to a library.

Related Topics

- To view an asset
- To change the status of an asset
- To change from the asset list view to the thumbnail view

About asset libraries

Digital assets are stored in libraries, which are the top-level organizational structure in the digital asset repository. You can access libraries and add assets to the libraries. You can only access a library if your IBM Unica Marketing Operations administrator granted you permission in the security policy assigned to the asset.

After you click the library that contains assets or folders you want to view, the Asset List page appears.

You must have administrative access to IBM Unica Marketing Operations to create a library.

To change from the asset list view to the thumbnail view

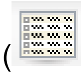
By default, IBM Unica Marketing Operations displays assets in a list view when you select an asset library. To change to a thumbnail view, perform the following steps.

1. Open IBM Unica Marketing and select **Operations > Assets**.

   A list of all available asset libraries displays.

2. Select an asset library from the list.

A list of assets in the current library displays.

3. Click the **List View Mode** icon () and select **Asset Thumbnails**.

The thumbnails view appears. For all assets that have an associated thumbnail image, the thumbnail is displayed next to the asset.

To add an asset

1. Log into IBM Unica Marketing.
2. Select **Operations > Assets**.

   A list of libraries appears. An administrator created these libraries to organize the assets.
3. Click the library that you want to contain the new asset. The library opens. If it contains folders, they appear at the top of the screen.
4. If the library contains folders, navigate to the folder that you want to contain the asset.
5. Click the **Add Asset** icon ().

   The New Asset screen appears.
6. Complete the New Asset screen.
7. Click **Save Changes** to create the asset.

The asset appears with a status of **Draft**.

Related Topics

- New asset page

New asset page

When you add a new asset, the system displays the New Asset page.

Field	Description
Asset Name	Enter a descriptive name for the asset.
Description	Enter a short, text description for the asset.
Owner(s)	Click **Add/Remove Members** to use the Select Owners dialog to designate additional asset owners.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Asset Code</td><td>To manually enter a code for an asset, clear the Auto-generate on save box. Then, type a code for the asset. The code can be any alpha-numeric string.

To have Marketing Operations automatically create an asset code, leave the Auto-generate on save box checked.

You can configure Marketing Operations to generate a code according to an algorithm your administrator specifies.</td></tr>
<tr><td>Keywords</td><td>Enter any keywords for the asset, separated by commas. When users search on these keywords IBM Unica Marketing Operations retrieves this asset.</td></tr>
<tr><td>Usage guidelines</td><td>Enter any guidelines for how you want people to use this asset. For example, if it is a logo, you can let users know where this type of logo should appear.</td></tr>
<tr><td>Expiration date</td><td>Enter an expiration for the asset or select the arrow in the drop down list to choose a date from the calendar.

After you enter a date you can use the arrow button to incrementally move the forward or back.

Marketing Operations sends a notification to the owners upon expiration, but the status of the asset does not automatically change to expired. At the expiration date you should archive the asset or change the expiration date.</td></tr>
<tr><td>Version name</td><td>Enter the version number of the asset. Note the following.
• This field defaults to version 1.0.
• Each version you add after this, by default, increments the version number.
• To override the default value, enter your own version number.</td></tr>
<tr><td>Files</td><td>Click Upload to open the Add Asset Files dialog. Check one or more of the checkboxes.
• File: specify the file for your asset. This field is required.
• Preview File: You may want users to access the preview file for reasons of security, speed, or convenience. For example, if the source file is a Photoshop file, you may want to provide a PDF file as your preview file so that users who do not have Photoshop can still see it. Unica recommends you use a PDF, GIF or JPEG file as a preview of the asset. This field is optional.
• Thumbnail File: You can upload a smaller version of the file that users see when they open the asset or when they view their library using the Asset Thumbnails view. This field is optional.

For each box you check, browse to the appropriate file and add it to the Add Asset Files dialog box.</td></tr>
</table>

Security considerations

For more information on setting up security to allow some users to only view the preview of an asset, see the *IBM Unica Marketing Operations Administrator's Guide*. If you have security concerns, consider watermarking the preview file, using a low-resolution version, or using some other method that protects the file and does not allow copying and saving of the file.

To edit an asset

If you upload a new file while editing, it replaces the previous file but does not create a new version of the asset. It is the same version as before you edited it, even if you change the Version Name field to a higher number. This allows you to correct the file if you accidentally added the wrong one previously.

You can only edit assets in draft state.

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to edit.
3. Click the asset you want to edit.
4. Click the **Edit** icon () and change any of the fields on the page.
5. Click **Save Changes** when you finish editing.

The asset is saved, with the same version number it had before the editing session.

Related Topics

- To add an asset
- To add a new version of an asset

About asset versions

Rather than replace an existing asset, you can add a new version of the asset. Note the following.

- You can download, preview, or delete older versions of an asset in the Version History section.
- If you delete the current version of an asset, the previous version becomes the current version.
- The current version of an asset displays when users navigate the library and try to attach assets.
- You cannot delete an asset version if it is the only version of the asset.

Related Topics

- To add a new version of an asset
- To edit an asset

To add a new version of an asset

Rather than replace an existing asset, you can add a new version of the asset.

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to edit.
3. Click the asset for which you want to add a new version.
4. Click the **New Version** icon () and change any of the fields on the page.

   The Version Name field automatically increments to the next version number.
5. Click **Upload** under File to upload the new version of the asset.
6. Upload files for the asset. You must at least upload a source file.
7. Click **Save Changes** to create the asset.

Optional result of the task.

The asset is saved, and the version number is incremented.

Related Topics

- To add an asset
- To edit an asset
- About asset versions

Asset statuses

You must own an asset to change its status, or have the proper security permissions. An asset can have any of the following statuses.

Status	Description
Draft	Indicates the asset is in a draft state. All owners can edit the asset, but other users cannot view it nor select it as an attachment. When you first add an asset, it has a status of Draft.
Locked	Indicates the asset is in a locked state. No one can edit the asset until it is unlocked. You may want to lock an asset if for some period of time, you do not want anyone to edit the asset.

Status	Description
Finalized	Indicates the asset is finalized. Everyone with permission to do so can access the asset (and attach it to a business process), but no one can edit it.
Archived	Indicates the asset is no longer available. No one can access the asset nor retrieve it. If this asset has been attached to an object (such as a project or plan), it is still available from that object.

Related Topics

- To change the status of an asset

To change the status of an asset

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to edit.
3. Click the asset whose status you wish to change.
4. Click the **Status** icon () and select one of the available statuses.

Related Topics

- Asset statuses

To view an asset

Once an asset has a status of **Finalized**, all authorized users can view and use the asset.

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to view.
3. Click the asset you wish to view.
4. Perform one of the following actions.
    - To view the asset, click Download next to the asset file.
    - To preview the the asset, click **Preview**. Use this option if you do not have permission to download assets or you are not sure if this is the asset you need.
    - To save the asset file or the preview file and download it to your computer, right-click the **Download** or **Preview** link and select **Save Target As** to save the corresponding file. Browse to the location where you want to save the file and click **Save**.

5. Close the window that contains either the downloaded file or the preview when you finish viewing the asset.

Related Topics

- About asset versions
- Assets and asset libraries

To view history of an asset

When an asset has a status of **Finalized**, all users who have permission to do so can view the asset's revision history and download history. Owners can view the revision history when the asset has any status.

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to view.
3. Click the asset you wish to view.
4. Click the **Analysis** tab.

   The revision history for the asset appears.

   The revision history displays status changes for the asset, version changes, updates to fields in the asset, and any comments entered during the changes.
5. Select **Download History** in the View field to view the download history for the asset.

The download history displays the date, time, file name, user who downloaded it, and the version of each asset that the user downloaded by clicking the **Download** link.

To add an asset folder

Use folders as a way to organize assets in a library. You must have permission to create folders before you can add them.

1. Select **Operations > Assets**.
2. Select the library to which you want to add a folder.
3. Click the **Add Folder** icon ().

   The New Folder page appears.
4. Enter a name and a description for the new folder.
5. Click **Save Changes**.

The folder opens. You can now add or move assets into this folder.

Deleting assets

Asset folders have the following characteristics.

- From within any library, you can delete assets and folders, if you have the proper security permissions.
- You can delete only empty folders.
- If you have permission to delete assets as an owner of the asset, but some other security role that you are in only allows you to delete assets if you inherit that delete permission from another role, you cannot delete an asset from the list of assets: you can only delete the asset from within the asset itself.
- Asset folders do not have owners. Different owners can own different assets in a folder, therefore the permission to delete an asset folder is not based on ownership.

Related Topics

- To delete assets and folders from the asset list page
- To delete an asset from within the asset

To delete assets and folders from the asset list page

From the asset list page, you can delete multiple assets and empty asset folders.

1. Select **Operations > Assets**.
2. Select the library that contains the assets and folders you wish to delete.
3. Select the checkboxes next to all the folders and assets you want to delete.

   You cannot delete asset folders unless they are empty.
4. Click the **Delete Selected Items** icon ().
5. Click **OK** when IBM Unica Marketing Operations prompts you to confirm the deletion.

The selected assets or folders are removed.

Related Topics

- Deleting assets
- To delete an asset from within the asset

To delete an asset from within the asset

1. Select **Operations > Assets**.
2. Select the library that contains the asset you wish to delete.

3. Click the asset you wish to delete.
4. Click the **Delete Selected Items** icon ().
5. Click **OK** when IBM Unica Marketing Operations prompts you to confirm the deletion.

Related Topics

- Deleting assets
- To delete assets and folders from the asset list page

To move assets and folders from the asset list page

From within any library, you can move assets and folders, if you have the proper security permissions.

1. Select **Operations > Assets**.
2. Select the library that contains the assets and folders you wish to move.
3. Select the check boxes next to all the folders and assets you want to move to a particular destination.

   To move assets to a different location, repeat this procedure for each different destination.
4. Click the **Move this Item** icon ().
5. Select the destination directory and click **Save Changes** or double-click the destination directory.

The destination directory opens with the folder or asset displayed in it.

Related Topics

- To move an asset from within the asset

To move an asset from within the asset

If you have permission to move assets as an owner of the asset, but some other security role that you are in only allows you to move assets if you inherit that move permission from another role, you cannot move an asset from the list of assets: you can only move the asset from within the asset itself.

1. Select **Operations > Assets**.
2. Select the library that contains the asset to move.

3. Click the asset to move.
4. Click the **Move this Item** icon ().
5. Select the destination directory and click **Save Changes** or double-click the destination directory.

The destination directory opens with the folder or asset displayed in it.

Related Topics

- To move assets and folders from the asset list page

13 Budgets

Budgets

In IBM Unica Marketing Operations, a budget allows you to plan expenses that will occur as you execute your plan, program, or project. After setting the plan budget, you can fund linked programs, and ultimately projects, from it. Marketing Operations tracks budgets of child programs and projects in the form of allocations, forecasted or committed spending, and actual expenses.

IBM Unica Marketing Operations tracks budgets of child programs and projects, although these objects may have different owners. For example, a program linked to a plan may have a different owner than the plan itself. As such, the person who allocates a budget from a plan down to a program may be different from the person forecasting expenses from a program up to a plan. Marketing Operations allows a plan owner—a marketing manager for example—to track of expected expenses from child programs and projects as well as the plan budget itself, and remain responsive to budgetary needs.

Budgets are available only when the Marketing Operations financial module is enabled.

Fiscal year

You can view the total budget for all years, or see a detailed view for a particular year broken down into weeks, months, or quarters.

IBM Unica Marketing Operations keeps budget information for the current fiscal year, the next two fiscal years, and any past fiscal years dating back to when you first installed Marketing Operations.

On the plan level, to view or edit a different fiscal year, change the **Fiscal Year** field value on the Plan Summary tab. Linked programs and projects take the financial year from the parent plan; standalone programs and projects use the system's current fiscal year.

Granularity

IBM Unica Marketing Operations allows you break fiscal years into weeks, months, or quarters. When creating a new plan, program, or project, choose the desired increment from the drop-down **Budget Granularity** on the Summary tab.

Users is not allowed to edit budget granularity. Plans, programs and projects with different budget granularities are not allowed to be linked together.

For example, if a plan’s fiscal year is broken into months, you can link it only with programs and projects with months as the budget granularity; in this scenario, programs and projects with weeks or quarters as their granularity are unavailable for linking.

For more information about linking plans, programs, and projects, see To link and program to a plan, To link an existing project to a program, and To link a child project or request to a project.

Budget funding

Although you can plan your budget using either top-down or bottom-up methods, the flow of actual money travels down the linked plan, program, project hierarchy. Regardless of how you plan your expenses, plans fund programs, which fund projects, which in turn fund any child or sub-projects.

For more information about budget planning, see Top-down budget planning and Bottom-up budget planning.

Since standalone programs and projects are not linked to plans, they have their own budgets which you enter directly on their respective budget tabs.

Top-down budget planning

"Top-down" planning is particularly useful if a plan has predictable expenses from year to year.

For example, if every year you create a plan called *New Product Launch* which includes tradeshows, you can create programs such as *Tradeshow 1*, *Tradeshow 2*, and so on, and assign funds to each program.

The *Tradeshow 1* program may include a project called *New Customer Acquisitions*, and as such, you can allocate funds from *Tradeshow 1* to make *New Customer Acquisitions* successful. Since the flow of funds is from the plan down to associated programs and projects, top-down planning is highly useful and very easy.

In summary, you manage budgeting from plans down to programs and projects in the following way.

1. Allocate funds to the plan budget.
2. Allocate funds from the plan budget its child programs.

3. Allocate funds from the programs to it child projects, which are grandchildren of the plan.
4. Allocate funds from the projects to it child sub-projects, which are great-grandchildren of the plan.

Bottom-up budget planning

In contrast to top-down budget funding, "bottom-up" budget funding is particularly useful if you are not sure how much funding to allocate down from the plan to child objects, but can forecast line items for the programs and projects. After predicting all project expenses, you can roll them up to parent programs, and ultimately, to plans.

Using the previous example, if you can predict the line item expenses of the *New Customer Aquisition* project in your *Tradeshow 1* program, you can finilize those line items to roll them up into *Tradeshow 1*'s expenses. Then, add additional line item expenses to *Tradeshow 1* if necessary and finalize them to roll expenses for *Tradeshow 1* up to the parent plan, *New Product Launch*. Starting from the bottom-most level, continue to add expenses to projects, programs, and plans until the parent plan accounts for all necessary allocations.

In summary, you manage budgeting from projects up to programs and plans in the following way.

1. Create projects and forecast their line item expenses.
2. Link the projects a parent program and plan.
3. Finalize the line items on each of the plan's child objects to roll the expenses up. You can now see how much funding the programs and projects need for successful completion.

Effects of deleting links between plans, programs, and projects

In general, removing the link between a parent object and a child object affects the budgets of both objects in the following ways.

- The parent object no longer allocates money to the child object.
- The expenses for the child no longer count against the parent.
- Funds allocated from the parent remain with the child, but have no source. In other words, the child object still accounts for having the money, but the parent object no longer accounts for giving it.

For example, removing the link between a program and a plan affects the budgets of both objects in the following ways.

- The plan no longer allocates money to the program, so the budget for the corresponding program area is decreased accordingly.

- The expenses for the program no longer count against the plan.
- The program still accounts for funds formerly allocated from the plan, so these funds either need to be removed from the program or funded from another source.

Budgets and accounts

In IBM Unica Marketing Operations budgets and accounts have no predetermined relationship. Accounts represent the financial element of an organization, while budgets represent the marketing side. Typically the financial element is not granular enough to capture marketing needs in detail. Budgets make up for this lack. A plan, program, or project may be funded from one or more accounts.

For more information on accounts in IBM Unica Marketing Operations, see About accounts.

Budget views

IBM Unica Marketing Operations offers two budget views on all budget tabs.

- Total view () is the default. It displays the total amount budgeted and remaining for forecasted, committed, and actual spending, across all fiscal years of a plan, program, or project's existence.
- Detailed view () displays budget information for a specified fiscal year broken down by week, month, or quarter.

Across all of the budget tabs for a plan, its child programs, and their child projects, the totals displayed reflect the total amounts for the life of the plan, program, or project. Therefore, the individual rows and columns in edit screens or the detailed view often do not add up to match the values displayed in the total view; this is not an error, but reflects the fact that the data, other than the total, corresponds to values for the currently selected fiscal year.

The views on the budget tab depends on the in-use budget allocation version. By default, you navigate to the budget tab of an object for the first time after login, the in-use version of the current fiscal year displays. The total view shows totals for the in-use version for all previous fiscal years and the current in-use budget allocation version. Detailed view also shows information based on the in-use budget version. For more information, see Budget Versions.

The Plan Budget tab

From top to bottom, the Plan Budget tab contains the following tables.

- The Plan Budget Summary table provides an overview of the entire budget.
- The Program Cost Summary table shows allocations to child programs.

Plan Budget Summary table

The Plan Budget Summary table is the topmost table on the budget tab of a plan and summarizes funds that you expect to spend in the plan and the programs it contains. The Plan Budget Summary table monitors finances for the entire plan.

- **Plan Budget** is the total budgeted amount.

  In total view, the Plan Budget Summary table displays the total budget for the plan's entire life; detailed view separates it into increments of the currently-selected fiscal year. Change the fiscal year on the Summary tab if necessary.
- **Program Allocations** shows the total budget of all the plan's programs.
- The **Forecast Total** is all predicted spending across the plan.
- The **Committed Total** is all the money spoken for in the plan up to this point. Even though the money is not yet spent, the committed total represents costs that will occur even if the plan is terminated.
- The **Actual Total** is all funds spent so far on the plan. IBM Unica Marketing Operations calculates the actual amount spent through the invoice functions. This total is likely to be much lower than the others due to time lags between planning expenses and actually paying bills.

The Remaing column

In each row, the **Remaining** column is the difference between the Plan Budget and the entry in the **Amount** column. For example, IBM Unica Marketing Operations calculates the forecast remainder by subtracting the forecast total from the Plan Budget.

Although calculated by a simple subtraction, the **Remaining** column provides high-level information and potential warnings about the financial state of the plan's budget. The remaining column summarizes how much money has already been allocated or planned for use, how much remains for additional spending, and how much you could recover if you cancelled unfinished efforts.

- In the **Program Allocations** row, the **Remaining** column represents additional money the plan owner has left to distribute to existing or not-yet-created programs. If the total allocation of funds to child programs exceeds the total budget of the plan, the remainder is negative and the plan will need more funding to successfully complete the programs.
- In the **Forecast Total** row, the **Remaining** column indicates the amount of money the plan owner will have left if current forecasts are accurate. If the figure is negative, the plan will need more funding to succeed at expected costs.

- In the **Committed Total** row, the **Remaining** column indicates how much money the plan owner will have left if the plan and all its programs and projects are cancelled. The plan owner needs to understand how much money can be returned if associated programs do not continue to execute, in the event that budgets are tightened.
- In the **Actual Total** row, the **Remaining** column represents the real balance that the plan owner has at the current time. This figure may be useful for monitoring cash flows, though it is likely lower than the forecast total or committed total remainder, simply due to the time lags between planning expenses and paying bills.

This topic specifically references the Plan Budget summary table. Programs and projects also have a Budget Summary table with the same layout and information on their respective Budget tabs.

Program Costs table

The Program Costs table is underneath the Plan Budget Summary table on the plan's Budget tab. The table rows list programs by area; the columns provide figures for Actual, Committed, Forecast, and Allocated spending.

On the Plan Budget tab, the program costs table only shows programs without breaking them down into their respective projects. However, even though you do not see the project expenses directly, IBM Unica Marketing Operations accounts for them through their parent programs.

The program name in each row of the Program Costs table provides a direct link to that program's budget. This link is particularly helpful because the Program Budget tab provides a breakdown of its child-project expenses in the corresponding Project Costs table.

This topic specifically references the Program Costs table on the plan Budget tab. Program and project Budget tabs also have a Costs table detailing expenses for their respective child-objects with the same layout and information.

The Program Budget tab

The Program Budget tab is very similar to the Plan Budget tab, but one level down the plan, program, project hierarchy. While the Plan Budget tab breaks down into information about linked programs, the Program Budget tab breaks down to information about linked projects. The Program Budget tab also contains an additional table about the program's line items.

After budget ancestors, from top to bottom, the program Budget tab contains the following tables.

- The Program Budget Summary table provides an overview of the entire budget.
- The Project Cost Summary table shows allocations to child projects.

- The Line Item Details table organizes line items for the program.

Navigating with budget ancestors

At the top of the Budget tab for projects and programs, **Parent Budget(s)** shows a hierarchical view of the current object, its parent, and all ancestors back to its root plan. The name and ID code displays for each object as well as direct links to each of the ancestor objects.

Use these links for easy navigation through the plan, program, project budget hierarchy.

Program Budget Summary table

The Program Budget Summary table is the topmost table on the Budget tab of a program, and summarizes funds that you expect to spend in the program and the projects it contains. The Program Budget Summary table monitors finances for the entire program.

In total view, the Program Budget Summary table displays the total budget for the program's entire life; detailed view separates budget information into increments for the currently-selected fiscal year and up to two previous fiscal years.

The Program Budget Summary table contains the same data as the Plan Budget Summary table, except on the program level. For more information about the table's fields and their meanings, see Plan Budget Summary table.

Project Costs table

The Project Costs table, found on the Program Budget tab, lists total costs associated with all of the projects that this program contains. It has the same layout and information as the Program Costs table on the Plan Budget tab.

For more information, see The Program Costs table.

Program Line Item Details table

The Program Line Item Details table is the third table found on the Program Budget tab. It summarizes line item information entered for individual expenses on the program level; these expenses belong to the program itself, not the projects linked to it. This table works with invoices to track spending. For more information about line items and invoices, see About rolling up line items.

If the program requires approvals for line items, the Line Item Details table shows the approval status for each line item in the second column.

-  = In Progress
-  = On Hold

- = Cancelled
- = Completed

This topic specifically refers to the Program Line Item Details table on the Program Budget tab. Projects also have a Line Item Details table with the same information and layout on their Budget tabs.

The Project Budget tab

The Project Budget tab has exactly the same tables, layout, and information as the Program Budget tab, except down one level in the plan, program, project, sub-project hierarchy. While the Program Budget tab breaks down into information about linked projects, the Project Budget tab breaks down to information about sub-projects if the project has any.

After budget ancestors, from top to bottom, the Project Budget tab contains the following tables.

- The Project Budget Summary table provides an overview of the entire budget.
- The Sub-project Cost Summary table shows allocations to child projects.
- The Project Line Item Details table organizes line items for the project.

For more information, see Plan Budget Summary Table for the Project Budget Summary table, Program Costs table for the Sub-project Cost Summary table, and Program Line Item Details table for the Project Line Item Details table.

Budget allocation versions

Budget allocations versions are a powerful tool for financial planning. Budget allocation versions allow you to explore different financial possibilities without overwriting the previous budget. You can create multiple budget versions with different allocations for expenses, compare versions, and then chose the most appropriate one for the plan, program, or project.

Use the options on the budget version drop-down list( ) to create, delete, and compare potential budgets until you find the best fit for your plan, program, or project. Then activate or finalize that version to mark it "in-use;" IBM Unica Marketing Operations rolls the allocations from the in-use version up to linked parent objects and down to linked child objects.

The budget version drop-down ( ) also lists all budget versions. The name of the budget version you are currently looking at is shown in red. The name of the in-use version is marked with a "^."

Budget versions account for different allocations, not different line items. Adding a line item to one budget version adds the item to all versions. However, you can use budget versions to determine how much to allocate to the line items. Budget versions allow you to explore the effects of spending different amounts of money on the same expenses. For more information, see Program Line Item Details table and To add or edit line items.

To view and comapare budget versions, you must have the security permission "view budget tab." To create, edit, delete, update, and mark in-use, you must have the security permissions "edit budget tab."

To create budget versions

Create different budget versions for financial forecasting of different scenarios. Then you can chose the most appropriate budget by comparing them.

1. Navigate to the budget tab of the plan, program, or project.
2. Click the versions icon (). Chose the new version option most helpful to you from the drop-down list.
   - **Create a new version** creates a blank allocation version and opens it in edit mode.
   - **Copy Current Version** copies allocation data from the version currently being viewed and opens it in edit mode. This method is particularly helpful for making subtle changes between versions.
   - **Copy Version From Different FY** opens a popup on which you can chose to copy any version from any fiscal year and opens the copy in edit mode. This tool is particularly useful if the budget you're working with will closely resemble the one for a prior fiscal year; for instance, if the budget decreased significantly from year A to years B and C, but year D's budget will resemble year A, you can copy that budget and use it as a starting point.
3. Give the new version a unique, descriptive name.

   IBM Unica Marketing Operations's default names are of the form "version #x," where x is one greater than the number of versions currently existing in that fiscal year. Version names must be unique within each financial year, but you can have the same name in different fiscal years.
4. Enter or edit allocations for the new budget version.
5. Click **Save and Finish** to return to the Budget tab. You can now access the new version from the versions drop-down list.

To delete versions

You cannot delete the currently selected version or in-use version. If you wish to delete the in-use version, you must first mark a different version as in-use.

To create, edit, delete, update, and mark in-use, you must have the security permissions "edit budget tab."

1. Navigate to a version other than the one you wish to delete by clicking on its name in the version ( ) drop-down list. The name of the currently selected version appears in red on the drop-down list.
2. Select the checkbox next to the names of one or more versions to delete.
3. Without leaving the drop-down list, click **Delete Selected Version(s)**.
4. When prompted, click **OK** to confirm the deletion.

To compare versions

This tool allows you to view the allocations for up to six budget versions on the same screen and is very useful when selecting the most appropriate one.

1. Navigate to the version to which you want to compare others by clicking on its name in the versions ( ) drop-down list. The name of the currently selected version appears in red on the drop-down list.
2. Select the checkbox next to the names of up to five other versions in the drop-down list.
3. Without leaving the drop-down, click **Compare Current with Selected**.

   The comparison screen appears. Colors differentiate each budget version. Red arrows indicate whether the allocations for each area are higher or lower than the current budget. While comparing, you can show and hide versions using **+** and **-**to isolate specifc versions in the comparison.
4. Once you finish comparing, click **End Comparison** in the yellow box at the top of the screen.

To mark a version in-use

IBM Unica Marketing Operations considers the active or finalized budget version of a plan, program, or project "in-use" and rolls this version down to linked child objects and up to linked parent objects. When working with budget versions, please note the following.

- Only one version can be active or finalized at a time.
- The default budget version is active and in-use for new plans, programs, and projects.

- After you finalize a version, you can no longer activate versions.
- After you finalize a version, you can finalize a different version, but you cannot remove the finalized status from all versions. After you finalize one version, one version from that fiscal year will always have finalized state.

If upgrading to IBM Unica Marketing Operations 8.5.0, the previously existing budget will automatically be finalized.

1. Navigate to the version you want to activate or finalize by clicking on its name in the versions () drop-down list. The name of the currently selected version appears in red on the drop-down list.
2. Click **Make Current Version Active** or **Finalize Current Version** from the versions drop-down list.

The version is marked active or finalized and is in-use. On the drop-down list, the in-use version is marked with "^" before the name.

To create, edit, delete, update, and mark in-use, you must have the security permissions "edit budget tab."

To allocate funds

A parent plan, program, or project allocates funds down to individual child programs and projects contained within it. Plans fund programs, programs fund projects, and projects fund sub-projects.

Add and edit allocations on the parent’s Budget tab. Begin by allocating money to a plan, then allocate down the program, project, sub-project hierarchy using the same procedure.

In this task, parent object refers to the plan, program, or project from which you are allocating funds. Child object indicates the next level down in the plan, program, project, sub-project hierarchy. For instance, if allocating from a program to a project, the program is the parent object and the project is the child object.

1. Navigate to the Budget tab for the parent object from which you want to allocate funds.
2. Select the allocation version you want to edit or create a new allocation version.
3. Click the **Allocations** icon () to modify allocations to the child project.

   The Cost Summary table appears opens in edit mode.

   - If you are working below the plan level, the first row of data is bold and controls allocations for the objects line items. See To add a program, project, or sub-project budget line item.

- The table lists the child objects in normal font below the parent's line items.

4. Add or edit allocations by clicking cells in the table and entering the appropriate value by week, month, or quarter.
   - For reference, the topmost row shows total funding for the parent object from which you are allocating funds for each week, month, or quarter.
   - The Remaining column shows how much money will be left in the parent object's budget with the current allocations.
5. Click **Save and Finish** to save your work and return to the Budget tab.

To continue funding, click on a child object in the Total Costs table to navigate to its Budget tab. Repeat the process by allocating funds from the new object to its child objects.

If you need to link additional parent and child objects, do so on the Summary tab and then return to the Budget tab to allocate funds to the new child objects.

To allocate funds for standalone programs and projects

A standalone program or project is not linked to a parent plan. When you create a budget for a standalone program, the budget reflects costs associated with the program itself and any costs associated with any projects linked to the program.

For standalone programs, the fiscal year is assumed to be the current year defined by the system clock.

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1. Navigate to the Budget tab for the standalone program or project.
2. Allocate money directly in the **total budget** row at the top of the table.

   This row is only editable for standalone programs and projects; linked programs and projects have a read-only total budget row because they receive funding from parent objects.

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3. Click **line items** () and add line items as needed. For more information, see To add or edit line items.
4. Enter a budget amount for each week, month, or quarter.
5. Click **Save and Finish** to return to the Budget tab.

The system populates total budget row at the top of table with the information you entered.

To add or edit line items

Line items outline the forecasted and committed costs for a program, project, or sub-project so a manager knows if the budget they have been allocated or plan to ask for is sufficient. Additionally, forecasted and committed amounts, once finalized, roll up to the accounts affected, providing visibility into budget and cash flow needs for higher level objects.

1. Navigate to the program, project, or sub-project Budget tab.
2. Click the **Line Items** icon (). The Edit Program/Project/Sub-Project Line Items page appears.
3. To add a new line item, double click an empty cell in the **Item Description** column. Enter an item name or description.

   The # field populates automatically once you have begun to enter an item in the **Item Description** field.

   To edit a line item, double click on it in the **Item Description** column and make changes as necessary.
4. If the line items table contains custom text fields, enter appropriate values.
5. In the **Expenditure Date** field, enter the anticipated date that funds will be spent. Click the arrow to launch a pop-up menu from which you can select a date. You must enter an expenditure date for the budget to be finalized.

   To track a certain expense on different dates, you should use separate line items. For example, to track the expense for `Printing` in May, June, and July, enter three separate line items, one for each month.
6. Select a source account from the **Source Account** drop-down menu. The funds for this program, project, or sub-project are posted against the account you choose when the line items are finalized.
7. Select a cost category from the **Cost Category** drop-down menu.
8. In the **Committed Amount** field, enter any committed funds related to the line item. Leave this field blank if no portion of the line item is committed.
9. In the **Forecast Amount** field, enter the amount that you predict or forecast the line item will cost.
10. Click **Save and Finish** to save your changes and go to the object's Summary tab.

IBM Unica Marketing Operations totals the line items, but they are not rolled into the parent object's budget until you finalize them. Finalizing line items may require approval. For more information, see To finalize budget line items.

Adding line items to one budget version adds them to all budget versions. For more information, see Budget versions.

To finalize budget line items

When you finalize budget line items for projects or programs that are linked to a parent program or plan, the forecasted and committed line item amounts roll up to the parent program or plan.

If the project or program requires line item approval, finalizing the line items triggers the approval process. When a line item requires approval, it only rolls up to the parent program or plan after completeing the approval process. The first column of the Line Item Details table shows the approval status; for more information, see Program Line Item Details table.

In order to finalize line items, they must have an assigned expenditure date.

Finalizing line items and finalizing budget allocation versions are unrelated. Finalize line items to roll them up to all budget versions, then activate or finalize the most appropriate budget version to use for your plan, program, or project. For more information, see Budget versions.

1. Add budget line items. For more information, see To add or edit line items.

   Finalize and **Discard Changes** links appear on the budget tab.
2. Navigate to the object's Budget tab and click the **Finalize** link.
   - If the program or project does not require line item approval or if the line item is automatically approved because of rules your administrator established in the object's template, IBM Unica Marketing Operations prompts you to confirm that you want to finalize your changes.
   - If any or all line items require approval, IBM Unica Marketing Operations prompts you to send the approval; for more information on the approval process, see Approvals. Line items that require approval are only roll up to the parent object after the approval process is completed.
3. Click **OK** to finalize your changes or send the approval. Click **Cancel** if you do not want to finalize changes or send approvals.

Once the budget line item changes are finalized, and approved if required, they roll up to their parent objects.

Related Topics

- To add or edit line items
- To discard budget line items

To discard budget line items

Instead of finalizing budget line item edits, you can discard all changes made since the last time you finalized budget line items.

1. Add budget line items. For more information, see To add or edit line items.

Finalize and **Discard Changes** links appear on the Budget tab.

2. Click **Discard Changes**.

   IBM Unica Marketing Operations prompts you to confirm that you want to discard your changes.

3. Click **OK**.

IBM Unica Marketing Operations discards the changes that you made to budget line items since the last time you finalized them and restores the previous finalized version of the budget line items. Marketing Operations does not trigger the approval process.

Related Topics

- To add or edit line items

Budget line item approvals

Depending on rule criteria your administrator establishes in project and program templates, budget line items may be automatically approved or sent through IBM Unica Marketing Operations's approval process. For example, your administrator might define rules based on the line item's expenditure date, source account, or cost category. Your administrator can also select default approvers for each rule, such as object or account owners. If your administrator has written these rules in your organization's project and program templates, then budget line items must be approved, either automatically via rules or by the assigned approvers, before they are finalized and roll up to the parent program or plan. However, if your projects and programs use templates that do not contain budget line item approval rules, the functionality works as it did before IBM Unica Marketing Operations 8.5.0 and line items can be finalized directly on the object's budget tab without going through an approval process in Marketing Operations.

Approval status for line items can be seen on the object's budget tab in the second column of the Line Item Details table.

-  = In Progress
-  = On Hold
-  = Cancelled
-  = Completed

Once an approval is sent, you may or may not be able to edit the line item.

- If the approval status is cancelled or completed, the approval can be edited. Finalizing any changes to the updated line item may trigger a new approval process.
- When the approval status is in progress, the approval cannot be edited. You must cancel the approval first; see To cancel an approval process.

14 Invoices

About invoices

IBM Unica Marketing Operations allows you to view all changes made to an invoice, and records the time and date, as well as the type of changes made to the invoice.

An invoice typically bills for multiple items or services, and itemizes them. It is important to be able to capture each item or service separately, as you can attribute different line items to different projects or programs and to different accounts.

For example, one invoice may contain two line items, the first associated with a project called Tradeshow, and the other associated with a program called Database Marketing Campaign. One line item may be associated with Account1, and the other, with Account2.

After you create an invoice, you can do any of the following actions from its Summary tab.

- Edit the summary information of the invoice.
- Add or edit line items for the invoice.
- Delete the invoice.
- Change the status of the invoice.
- Print the Invoice summary page.

To add an invoice

1. Select **Financials > Invoices**. The My Active Invoices page appears by default.
2. Click the **Add Invoice** icon ().
3. Fill in the fields on the New Invoice page. For more information, see New invoice page.
4. To add line items, click **Save and Edit Line Items**. For more information, see To add or edit invoice line items.

   You must add line items to move the invoice out of **Draft** state, mark it as **Paid**, and roll up the expenses.

5. **Save** the invoice.

New Invoice page

This table describes the fields available on the New Invoice page.

Field	Description
Invoice #	An invoice number could be one of the following. • A number provided to you by an external vendor or supplier in a paper invoice • An original number based on your company's code schema for internal invoices or expense reports. Invoice numbers are not required to be unique across all the invoices in IBM Unica Marketing Operations, but they must be unique among all invoices for a particular vendor.
Vendor Name	Select a vendor from the drop-down list. IBM Unica Marketing Operations administrators populate this list. If you cannot find a vendor on the list, ask your administrator.
Owner(s)	Click **Add/Remove Members** to add or remove owners. By default, this field contains the name of the invoice creator.
Security Policy	Select the invoice security policy from the drop-down list. The default value is **Global**.
Purchase Order #	Enter the purchase order number associated with the work now being invoiced. Typically, this is an internal company number. In some cases, the purchase order number is used to track preapproved invoices.

Field	Description
Invoice Date	Enter the billing date of the invoice or select it on the calendar.
Due Date	Enter the date by which the vendor expects payment or select it on the calendar.
Other Notes	Enter any helpful notes or comments related to the invoice.
Payment Terms	Enter any notes regarding payment.

To edit an invoice

1. Select **Financials > Invoices**.
2. Select the invoice you want to edit. Depending on the status and owner of the invoice, it may be on the My Active Invoices page or the All Invoices page.
3. If your invoice is not in **Draft** state, click the status drop-down () and select **Re-draft**.
4. Edit the fields on the Invoice page as needed. For more information, see New invoice page.
5. Add or edit line items. For more information, see To add or edit invoice line items.

   You must add line items to move the invoice out of **Draft** state, mark it as **Paid**, and roll up the expenses.

6. **Save** the invoice.

About rolling up line items

When you change an invoice's status to **Paid**, the invoice line item amount rolls up to the program or project budget as well as to the account with which you associated it. Remember that you can attribute the different line items of one invoice to different projects or programs and to different accounts. Line items from multiple invoices can roll up to the same program or project.

There are two types of rollups.

- **Scheduled** rollups occur on a scheduled basis.
- **Immediate** rollups occur when you change an invoice's status to **Paid**.

Depending on line item approval rules set by your IBM Unica Marketing Operations administrator, line items may need to go through an approval process before the whole invoice can be marked Payable, a pre-requisite to changing the invoice’s status to **Paid** and rolling up line items. For more information, see Invoice line item approvals.

Invoice Line Item Approvals

Depending on rule criteria your administrator establishes in invoice templates, line items may be automatically approved or sent through IBM Unica Marketing Operations's approval process. For example, your administrator might define rules based on the line item's cost per unit, total quantity, or total cost. If your administrator has written rules in your organization's invoice templates, then all invoice line items must be approved, either automatically via rules or by the assigned approvers, before the invoice is marked as **Payable**. Once the invoice is moved from **Payable** to **Paid**, the invoice rolls up to assinged accounts and the parent program or project's budget. However, if your invoice templates do not contain line item approval rules, the functionality works as it did before IBM Unica Marketing Operations 8.5.0 and the invoice can be marked as **Payable** without going through an approval process in Marketing Operations.

Approval status for line items can be seen on the invoice summary page.

-  = In Progress
-  = On Hold
-  = Cancelled
-  = Completed

Rollups to the source program or project

When you add an invoice line item, you link it to a program or project through the Source Project or Program field. Once the invoice is paid, IBM Unica Marketing Operations figures the invoice line item amount into the program or project budget. Depending on whether the invoice line item is a negative or positive number, IBM Unica Marketing Operations adds or subtracts the amount on the Actual Total field on the source project or program Budget tab.

For example, if an invoice contains a line item of $75 that you associate with Project1, the Actual Total field on the Project1 Budget tab increases by $75 once the invoice is paid, signifying the amount of funds used in the budget.

If an invoice contains a line item of -$75 (indicating a credit) associated with Project1, the Actual Total field on the Project1 Budget tab decreases by $75 once the invoice is paid. If the Actual Total previously showed $200 (the total from all Paid invoices containing line items linked to Project1), the Actual Total column, once the credit is rolls up to Project1, show $125, signifying the funds used so far for Project1.

Depending on how your administrator configures your invoice templates, marking the invoice Payable may trigger an approval process.

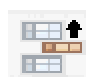
Rollups to the source account

When you add an invoice line item, you can also designate an account to which you linked the invoice line item. Once the invoice is paid, the invoice line item amount rolls up to, or figures into, the account. The invoice line item amount displays on the Actual row on the account Summary tab. IBM Unica Marketing Operations places the amount in a date column that corresponds to the invoice paid date.

Depending on how your administrator configures your invoice templates, marking the invoice Payable may trigger an approval process.

To add or edit invoice line items

You must add line items to eventually mark the invoice **Payable** and roll expenses up to accounts and budgets.

1. Navigate to the invoice by selecting **Financials > Invoices**.
2. Click the invoice number of the invoice to which you want to add line items.
3. Click the **Line Items** icon ().
4. Fill in the fields on the Edit Invoice Line Items page. Use the following tools to help you add, edit, move, or delete line items.
    - Click the **Add Row** icon () to insert a new line item.
    - Use the **Move Selected Row Up** icon  or **Move Selected Row Down** icon  to change the order in which the line items appear.
    - Click a line item and use the **Delete the Selected Row** icon  to delete a line item.
5. **Save** your changes.

Once line items are saved, the system calculates the Invoice Total of all line items.

Field descriptions for the Edit Invoice Line Items page

This table lists the fields available on the the Edit Invoice Line Items page.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Item Description</td><td>Click in the field to enter a description for the line item.

The # field populates automatically when you create a new line item.</td></tr>
<tr><td>Source Project or Program</td><td>Click the drop-down arrow to search for a project or program with which the invoice line item is associated.

In the Select Item window, do the following.

1. Click either the Project or Program radio button under the find by name or code field according to which item you want to find.
2. Enter a search string to search for a specific project or program in the Find by name or code field. Or, leave blank and click Find to search for all projects or programs.
3. Select a project or program from the Search Results list.
4. Click Select to close the dialog box and add the selected project or program to the line item.

This field is required in order to be able to move an invoice into the Payable state. Once in the Paid state, the invoice amount rolls up to the Actual Total field on the source project or program Budget tab.</td></tr>
<tr><td>Source Account</td><td>Click the drop-down list to select from all enabled accounts. The funds for this item come from the account you choose.

Once in the Paid state, the invoice amount rolls up to the source account's summary information.</td></tr>
<tr><td>Cost Category</td><td>Click the drop-down list to select an enabled cost category.</td></tr>
<tr><td>Cost per Unit</td><td>Enter the amount of the line item.</td></tr>
<tr><td>Qty</td><td>Enter the line item quantity.</td></tr>
<tr><td>Cost</td><td>Displays the total cost for the line item. The system calculates this field after you enter values in both the Cost per Unit and Qty fields.</td></tr>
</table>

Invoice status types

IBM Unica Marketing Operations invoices can be in the **Draft**, **Cancelled**, **Payable**, **Under Review**, or **Paid** state.

Status	Description
Draft	Indicates the invoice is still being worked on; an invoice is in **Draft** state when it is first created. To move an invoice out of **Draft** state, you must add line items. If necessary, you can place an invoice in **Draft** state by choosing **Re-draft Invoice** from the Status drop-down menu.
Cancelled	Canceling an invoice is not the same as deleting an invoice. When you cancel an invoice, it is inactive, yet you retain the ability to view it in IBM Unica Marketing Operations. Deleting an invoice removes it from the system. When you move an invoice to this state, Marketing Operations sends an alert to the invoice owner(s).
Under Review	Approvers are in the process of examining the invoice's line items. This is an internal status that occurs after marking an invoice **Payable**.
Payable	Items on the invoice have been reviewed, and the invoice is ready to be sent to Accounts Payable. When you move an invoice to this state, the owner of the account to which the invoice belongs receives a notification. Changing an invoice's state to Payable triggers the IBM Unica Marketing Operations approval process if your organization is using this functionality. The invoice may enter the **Under Review** status while waiting for approvals. For more information, see invoice line item approvals.
Paid	The invoice has been paid. When you move an invoice to this status, the system triggers invoice rollup. This status is not available until the approval process is complete.

When changing an invoice from one state to another, a dialog box appears in which you are able to enter comments regarding the status change. IBM Unica Marketing Operations records these comments in the invoice revision history. When changing an invoice to the **Paid** status, you are able to enter the date on which the invoice was marked **Paid**.

To change the status of an invoice

1. Navigate to the Summary tab for the invoice of which you want to change the status.
2. Click the **Status** icon ( ) and select a status. A dialog box appears in which you can add comments.

If you select **Cancelled** or **Paid**, you cannot change the status of the invoice at a later time.

3. Click **Continue** to close the dialog box and apply the new status.

To delete an invoice

Owners and users with the proper security privileges can delete an invoice that is in the **Draft** state. You cannot delete invoices in the **Cancelled**, **Payable**, or **Paid** state.

1. Navigate to the invoice by selecting **Financials > Invoices**.
2. Click the invoice number of the invoice you want to delete.
3. Click the **Delete this Item** icon ().

   IBM Unica Marketing Operations asks whether you would like to delete the invoice.
4. Click **OK**.

To print the invoice summary

You can print all information found on your invoice summary page, or select certain columns of information to print. See the procedure below for instructions.

1. Navigate to the summary page of the invoice you want to print.
2. Click the **Print** icon . A window appears with a list of columns from which you can choose to print. By default, all columns are selected.
3. Clear any columns you do not want to print.
4. By default, the **Shrink to Fit Landscape Page Width** box is checked. Clear to print the columns at a size of 100%.

   Selecting this option shrinks the page to fit all selected columns onto a single page. If you use this feature, you should change your printing preference (for this print job) to landscape.
5. Click **Print Selected Columns**. A preview window appears, showing you what the printed information will look like.
6. Click **Print**. The Print dialog appears.
7. Select your printer and printer options (choose landscape mode for best results), and click **Print** to print the selected columns.
8. In the preview window, click **Close** to close the print preview.

15 Accounts

About accounts

A top-level IBM Unica Marketing Operations account represents a specific corporate general ledger account established by a finance department for the purpose of tracking and controlling expenditures and cash flows for a certain area of the business. Accounts may have subaccounts.

Key capabilities related to accounts include the following.

- Defining a hierarchy of accounts and subaccounts.
- Funding or allocating money to the account, at the beginning of a fiscal period, typically a year, revisited weekly, monthly, or quarterly.
- Tracking estimated and actual withdrawals from those accounts, by time period.

You must have administrative privileges to add new accounts to IBM Unica Marketing Operations.

About the accounts summary page

When you select **Financials > Accounts**, the account Summary tab appears. Use the account Summary tab to perform the following tasks.

- View Basic account information.
- Review the Account summary table. This is a view-only table which reflects the budgeted, forecasted, committed, and actual amounts for that account, as well as remainder amounts.
- Select the fiscal year to view.

Related Topics

- Account summary table

Account summary table

The Account Summary table contains the following information.

Field	Description
Budget	Amounts that the account administrator entered to fund the account. For more information on creating and editing accounts, refer to the *IBM Unica Marketing Operations Administrator's Guide*.
forecast	The sum of all forecasted values entered into the **Forecast Amount** field of finalized project and program budget line items for which this account is the source account (as specified in the budget line item Source Account field). These sums appear for a particular month on the table according to when you finalized the line items. For example, if you finalize a forecasted line item amount in May, that amount appears in the May column of the **Forecast** row.
Available	The difference between values in the **Budget** and **Forecast** rows.
Committed	The sum of all committed values entered into the **Committed Amount** field of finalized project and program budget line items for which this account is the source account (as specified in the budget line item Source Account field). These sums appear for a particular month on the table according to when you finalized the line items. For example, if you finalize a committed line item amount in May, that amount appears in the May column of the **Committed** row.
Uncommitted	The difference between values in the Budget and Committed rows
Actual	The sum of all invoice line items for which this account is the source account (as specified in the invoice line item Source Account field). These invoice line items roll up to this field only when the invoice to which they belong is in the **Paid** state. These sums appear for a particular month in the table according to when you marked the invoice line items Paid. For example, if you mark an invoice line item amount Paid in May, that amount appears in the May column of the **Actual** row.
Remaining	The difference between values in the **Budget** and **Actual** rows.

About selecting the fiscal year to view

Because accounts can span multiple fiscal years, you can select a year in which to view the account information.

From the **Account Summary** drop-down list, you can choose from the current year, and the following two years. Additionally, if budget or invoice line items draw from the account in other years, those years also appear in the list.

A Marketing Operations administrator configures your fiscal year by setting a parameter in the `plan_config.xml` file to the month that you would like your account fiscal year to begin. For more information, see the *IBM Unica Marketing Operations Administrator's Guide*.

16 Metrics

Metrics

Metrics are used for management reports and analysis. You view them on the Tracking tab for plans, programs and projects.

Use IBM Unica Marketing Operations metrics for the following calculations.

- Automatically calculate internal measures (such as budgets and resource consumption).
- Automatically tabulate program results, such as the following.
  - measure consistently across activities.
  - aggregate results across programs.
- Automatically link key metrics (such as number of contacts and responses) from campaigns back to project metrics.
- Build a marketing memory.

The metrics that are available in a plan, program, or project depend on the template you used to create it.

To set up program or project metrics

This procedure describes setting up metrics for a program; setting up metrics for a project is similar.

1. Add a program, using the wizard.

While using the wizard, the tracking page displays the template tracking information for your program. You cannot change the type of information that is captured on this page. You can enter target values for the categories that exist on the Tracking page. Depending on how your administrator set up your program templates, the number of columns on this page can vary.

2. Enter the target value you want to achieve by executing this program in the **Target** column. For example, if the program is a product launch, you may want to achieve 100 contacts, or get 1 hour of media coverage.
3. If other columns such as **Optimistic** or **Pessimistic** appear, you can enter corresponding values. For example, if your target value for a **Total Contacts** category was 100, a **Pessimistic** value for **Total Contacts** might be 50.
4. Click **Next** to continue the program wizard.

   When you are finished creating the program, the metrics you entered appear on the **Tracking** tab for that program.

Related Topics

- To add a program

To edit program or project metrics

When you created your program or project using the wizard, you entered various metrics on the Tracking page. To edit the values you entered, follow the procedure below.

If the program is linked to a plan, or the project is linked to a program, you must finalize the edits you made before they will roll up to the parent object.

This procedure describes editing metrics for a program; editing metrics for a project is similar.

1. Navigate to the **Tracking** tab of the program whose metrics you would like to edit.
2. Click the **Program Metrics** icon ().

   The Edit Program Tracking page appears.
3. Edit the values you would like to change.
4. Click **Save and Finish**.

The **Tracking** tab for the program displays. The updated metrics appear in the Program Metrics table.

Entering planned values for rollup metrics

You can incorporate your goals and performance expectations for your marketing campaign into IBM Unica Marketing Operations by entering planned values for metrics that roll up. The planned values display side-by-side with the actual values at the end of the campaign.

When entering planned values for metrics, you work top-down. That is, you open a plan and specify planned values for the metrics for each of its child programs. You then open a program and add planned values for the metrics for each of its child projects.

To enter planned values for metrics that roll up

1. Open a plan or program that has child programs or projects with rollup metrics.
2. Click the **Tracking** tab.
3. Click the **Planned Rollups** icon ().

   The Edit Planned Rollup Values page displays.
4. Enter the planned values for the metrics.
5. Click **Save and Finish**.

The values you entered display in the Planned column of the Program Metrics or Project Metrics table on the Tracking tab.

Views for rollup metrics

The following views are available for rollup metrics.

View mode	Description
High-Level Summary	Displays a summarized view of all rolled up metric dimensions. This is the default view.
Breakout of Planned	Displays details of planned values for rollup metrics.
Breakout of Planned and Rollup Target(s)	Displays details of planned and target values for rollup metrics
Breakout of Planned, Rollup Target(s), and Rollup Actual(s)	Displays details of planned, target, and actual values for rollup metrics.

View mode	Description
Breakout of All Rollups	Displays details of target, actual, and any other custom values for rollup metrics used in the plan or program.

To change the view for rollup metrics, click the **View** icon ( ) and select a view from the drop-down menu.

To import metrics from a campaign

1. Navigate to the **Tracking** tab of the campaign project whose metrics you want to import.
2. Click **Import Values**.

   The IBM Unica Campaign metrics are displayed on the **Import Values** page. The information imported depends on the metrics the template creator defined. IBM Unica Marketing Operations captures and displays the last date of import, shown as **External Sources Last Refreshed Date Time** at the bottom of the table.
3. Click **Save and Finish** to update the metrics on the Tracking tab and close the **Import Values** page.

If necessary, manually update metrics that you imported.

Related Topics

- To edit program or project metrics

Finalizing and rolling up metrics

When a project is linked to a program or a program is linked to a plan, you can roll up metric values from the child object to the parent object. Template creators define how metrics roll up to the parent object. For more information on defining rollup behavior, see the *IBM Unica Marketing Operations Administrator's Guide*.

Planned values for metrics do not roll up. Those values are for top-down planning.

Metric values do not roll up automatically. IBM Unica Marketing Operations rolls up the values when you indicate they are final. Each time you import new metric values or edit metric values, you must indicate the values are final in order for them to roll up.

Whenever there are metric values that have not been rolled up, a **Finalize** link displays on the Tracking tab of the object containing the values.

To finalize and roll up metrics

The **Finalize** link only displays if there are new or changed metric values that have not yet been rolled up.

1. Navigate to the **Tracking** tab of the project or program whose metrics you want to roll up to their parent program or plan.
2. Click the **Finalize** link. (The **Finalize** link appears after metrics are edited or imported.)
3. The metrics that are defined for rollup are rolled up to the parent program or plan and are available on the parent object's **Tracking** tab.

Related Topics

- To enter planned values for metrics that roll up

17 Reports

About reports

By default, IBM Unica Marketing Operations provides four reports and six dashboard components. The Marketing Operations reports package provides additional example reports and dashboard report components created in Cognos 8 BI, a third-party business intelligence application.

You access reports from IBM Unica Marketing Operations in the following ways.

- Click the **Analysis** tabs of individual items like projects and marketing objects to see reports that apply to the current item.
- Select the **Analytics > Operational Analytics** to see example Cognos reports that present data from more than one object.

The reports administrator can modify the reports, create new ones, add custom attributes, set up criteria filters, and so on.

Report appearance and output

Each Cognos report has a header, a body section, a page footer, and navigation buttons. When you run a report, it appears in your browser window in HTML format. For many of the reports, you can select a different format (for example, PDF or XML) to view.

Because the following reports have multiple queries, you cannot export them as CSV or XML files.

- Analytics page report: Project Crosstab Summary Report
- Analysis Tab reports: Project Detailed Expense Breakout, Project Approval and Response, and Budget Summary reports (plan, program, project)

For further details on report output appearance and formats, see the Cognos documentation.

Sending reports in e-mail

Click the e-mail icon ( ) to bring up a form where you enter e-mail addresses for recipients of the report. After you complete the form and choose OK, the report is sent in the current format chosen for display.

For example, if you choose PDF then e-mail, the report is sent as a PDF attachment to the message.

Enter the following information in the e-mail dialog:

- **E-mail addresses**: type the address for each recipient, separated by semicolons.
- **Subject**: type subject for the message. Defaults to the name of the report.
- **Body**: type in the message.
- **Attachments**: ensure the **Include the report** box is checked.

Do not select **Include a link to the report**; this option is not currently supported.

Filtering report criteria

The data in reports can be filtered in various ways, depending on the report. You use filters to specify report criteria and parameters for your report.

This section describes how to use the filters and prompts that appear when you run reports.

Search and Select Prompt boxes

This type of filter allows you to perform a search and then choose which results to use for the report. Various reports use these filters for the following types of data:

- Owners
- Users
- Vendors
- Projects; you can search by project name or project code.

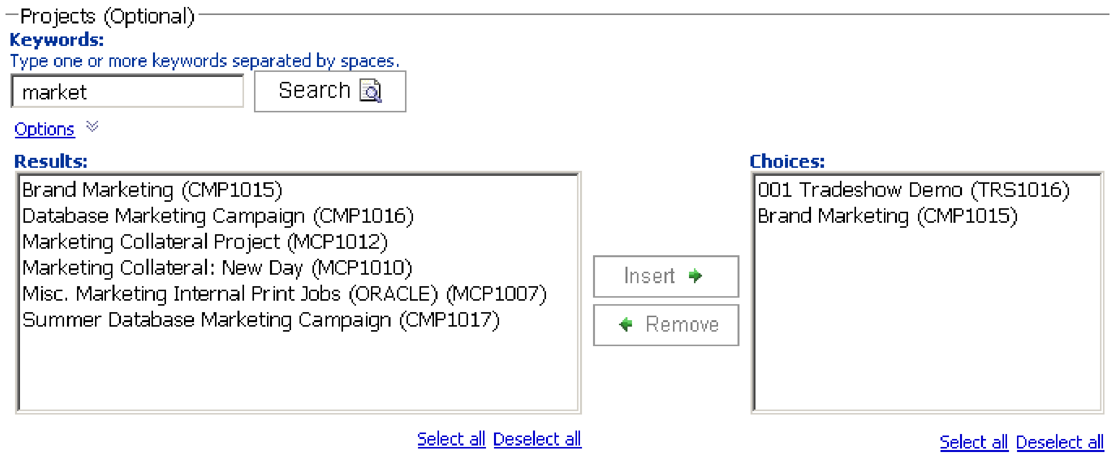
1. Type keyword(s) to search, then optionally choose the search option:
    - Starts with any of these keywords (default setting)
    - Starts with the first keyword, and contains all of the remaining keywords
    - Contains any of these keywords
    - Contains all of these keywords

    For example, if you are searching for project code **PRO1001**, you could type **PRO** or **1001**, and choose the **Contains any of these keywords** option.

2. Click **Search**.

   System returns data matching the search criteria.

3. Use the **Insert**, **Remove**, **Select all**, and **Deselect all** buttons to create a list of items for your report. Move the items to appear in your report into the **Choices** list box, as shown here:



   The report will contain data for the owners, users, vendors or projects appearing in the **Choices** list box.

Dates

To narrow the date range for your report, use the Date filter:

- The **Earliest date** button puts no limitation on the begin dates for the search. Similarly, the **Latest date** button does not limit by end date. The default setting is to have both of these buttons selected, which means the system does not filter on dates at all.
- Entering actual dates in the **From** and/or **To** fields limits the report to tasks containing dates active within the selected range.

Active dates

Date prompts use active dates. All projects (or plans or programs) that are active any time within the date range specified meet the report criteria.

For example, if you specify a date range from January 1, 2005 to March 15, 2005, the following projects will meet the criteria:

- Projects starting on or after January 1, 2005, no matter when they end.
- Projects ending on or before March 15, 2005, no matter when they began.

Projects that do not meet the criteria:

- Projects ending before January 1, 2005
- Projects starting after March 15, 2005

Status and Type

These filters limit the report to contain only tasks with selected status or type (determined based upon the template used to create the project). For these filters, select as many choices as you like.

Making no selection is equivalent to selecting all choices.

Multi-object reports

This section describes the default reports that are listed on the **Analytics Home** page when the IBM Unica Marketing Operations reports package is installed. It also presents procedures for running them.

The following table lists the default reports.

Report	Description
Overdue Milestone	Displays all overdue milestones with task end dates that fall between the selected start and end dates.
Program Tasks and Milestones	Displays all milestones for the program selected in the parameter field.
Project On Time Analysis	Displays completed projects within the time period specified along with the number of days early or late. These dates are calculated by pulling the greatest date in the workflow for the project for both the target and forecast/actual columns.
Project Performance Crosstab	Displays project performance metrics, including: leads passed, revenue, and ROI. The data is aggregated over initiative and project type vs. business units. This report requires the Financial Management Module.
Project Performance Summary	Displays projects and their budget data. This report requires the Financial Management Module.
Project Performance Summary (Custom)	Displays projects grouped by initiative, with their budget, cost, revenue, response rate, and lead generation performance data. This report demonstrates how a sample report can be customized using custom attributes. This report does not work unless your template administrator has implemented the example custom attributes. This report requires the Financial Management Module.
Project Tasks	Displays all tasks and their status for the specified project.
Resource Task Load	Displays tasks assigned to selected users. The report returns tasks for each project that falls into the specified date range.

Report	Description
Resource Utilization Summary	Displays a summarized view of resource utilization percentages by user. Select start and end dates to specify a date range for the report.
System Programs	Displays a breakdown of programs by status and template type.
System Projects	Displays projects broken down by status and template type.
System Users	Displays details for each IBM Unica Marketing Operations user.
Task On Time Analysis	Displays all tasks that have been either early or late, where the task end date falls between the Start Date and End Date parameters chosen for this report. The report is grouped by task name. If a task ended early, the number of days it finished ahead of schedule is displayed on a green background. If it ended late, the number of days late is displayed as a negative number on a red background.
Vendor Spend Summary	Displays total invoiced expenses for specified vendors in the specified date range, including breakouts for paid, approved, and received expenses. This report requires the Financial Management Module.

To run the Overdue Milestone report

The Overdue Milestone report shows all overdue milestones with task end dates that fall between the selected start and end dates. You can filter the report by using the **Report Start Date** and **Report End Date** parameters as well as the **Task Status** and **Project Status** parameters.

1. Select **Analytics > Operational Analytics**.
2. In the list of reports, click **Overdue Milestone Report**.

   A screen appears allowing you to set filter criteria.
3. Choose start and end dates for the report.
4. Optionally, set filters for Task and Project status.
5. Click **Finish** to create the report.

The report displays a list of milestones, grouped by the milestone owner, sorted by project code, and containing the following columns: Milestone Owner, Project Code, Milestone, Task Number, Status, Task Name, End Date, Forecast/Actual End, Days Late, and Notes.

Related Topics

- To set your basic options

To run the Program Tasks and Milestone report

The Program Tasks and Milestones report shows all milestones for projects that are part of the program selected in the parameter field. You can filter the report on milestone type. If you chose not to filter on milestone type, all tasks are displayed.

1. Select **Analytics > Operational Analytics**.
2. In the list of reports, click **Program Tasks and Milestones**.

   A screen appears allowing you to set filter criteria.
3. Select a program in the **Program** drop-down menu.
4. Optionally, select Milestone types for the report. Note that if you do not choose any Milestone types, the report will contain all tasks in all projects that belong to the selected program.
5. Click **Finish** to create the report.

The report displays a list of milestones (or tasks), grouped by project and sorted by date, and containing the following columns: **Project Name** , **Milestone type**, **Task Number** , **Forecast/Actual** dates and effort, **Target** dates and effort, **Variance**, and **Notes**.

The Variance column contains the number of days early or late the milestone occurred. If a milestone is reached early, it is displayed on a green background. If it is reached late, it is displayed as a negative number on a red background.

To run the Project Performance Crosstab report

The Project Performance Crosstab report shows high-level project metrics in a cross tab along multiple dimensions of custom attributes.

The example included is a cross tab of project performance metrics including leads passed, revenue, and ROI (Return on Investment), aggregated over initiative and project type vs. business units.

This report requires the Financial Management Module.

1. Select **Analytics > Operational Analytics**.
2. In the list of reports, click **Project Performance Crosstab**. A screen appears allowing you to set filter criteria.
3. On the first filter page, choose the projects to include in the report. To specify other filters, click **Additional Prompts** and proceed to step 4. Otherwise, skip to step 5.
4. On the second filter page, specify filters for any or all of the following:
   - Project owner
   - Project date range
   - Project status
   - Project type: these are determined based upon the template used to create the project

All sections on the filter pages are optional. If you do not fill in any information in any of the sections, the resulting report contains the resource task load for all users and all projects in the system.

5. Click **Finish** to create the report.

The sample report provided contains the following information:

- Row Dimensions: (1) Initiative, (2) Project Type

  Data in the rows is grouped by Initiative; you can use this field to categorize your programs and plans. Each Initiative section contains rows for each Project Type included in the report.

  Project type is determined from the template used for creating the project. Sample project types are **Database Marketing Campaign**, **Tradeshow Template**, **Marketing Collateral**, and **Campaign Project Template**.

- Column Dimension: Business Unit

  A business unit is a field on the project and plan creation page. It is one way to categorize projects and plans.

- Metrics to show: number of leads passed, revenue, and ROI (Return on Investment)

  Example of a Project Performance Crosstab report:

	Business Units			
# Leads Passed (Actual) $ Revenue (Actual) ROI (Actual)	Credit Card	Insurance	Investment Services	*Business Unit Total*
Report Total		520	263 $1,718.00 76.39%	783 $1,718.00 -72.26%
Initiative: (No Value)		520		520
Project Type:				
Project Type: Tradeshow		520		520
Project Type: Marketing Collateral Project				
Initiative: Product Launch			263 $1,718.00 76.39%	263 $1,718.00 76.39%
Project Type: Database Marketing Campaign			263 $1,718.00	263 $1,718.00

To run the Project Performance Summary report

The standard Project Performance Summary report lists projects alphabetically, along with status, date, and budget information. The custom version lists projects grouped by initiative, with budget, cost, revenue, response rate and lead generation performance data. Both versions require the Financial Management Module.

The custom version of this report also contains additional prompts and custom fields. It demonstrates how a standard report can be customized using custom attributes and works only if your template administrator has implemented the custom attributes.

1. Select **Analytics > Operational Analytics**.

2. In the list of reports, click **Project Performance Summary**.

   A screen appears allowing you to set filter criteria.

3. On the first filter screen, you can choose the projects to include in the report. If this is your only filter criteria, click **Finish** to run the report. To specify other filters, click **Additional Prompts** and proceed to step 4.

4. On the second filter page, specify filters for any or all of the following:

   - Project owner
   - Project date range
   - Project status
   - Project type: these are determined based upon the template used to create the project

   All sections on the filter pages are optional. If you do not fill in any information in any of the sections, the report contains project performance for all projects in the system.

5. Click **Finish** to create the report.

The report displays a list of projects sorted by project name. The custom version is grouped by Initiative. The reports contain the following columns:

Column	Description
Project Name/Code	Displays the project name and its ID.
Status	Displays the status of each project.
Target dates	Displays the target start and end dates.
Business Unit, Segment, and Product Family	Displays the business unit, segment, and product family for each project. These are fields included with the sample templates, used to categorize projects. Not all types of projects contain all of these fields. If your report uses a project that does not contain one or more of these fields, the column is ignored (it is blank for that project). (These fields are only in the custom version of the report.)
Total Budgeted Total Forecasted Actual Cost	Displays a variety of budgeting information. These fields are filled in from the budget tab for each project.
Total Revenue	Displays revenue metrics (if defined) for the project.
Response rates and leads columns	Displays response rate and leads generation data. Response rates and leads data are taken from the metrics for each project (found in the **Tracking** tab). (These fields are only in the custom version of the report.)

Column	Description
ROI	Displays ROI (Return On Investment) metrics (if defined) for the project. (This field is only in the custom version of the report.)

To run the Resource Task Load report

1. Select **Analytics > Operational Analytics**.
2. In the list of reports, click **Resource Task Load**.

   The **Filter Resource Workload** screen appears.
3. Specify filters for any or all of the following:
   - User
   - Projects
   - Project date range
   - Project status
   - Project type: these are determined based upon the template used to create the project

   All sections on this page are optional. If you do not fill in any information in any of the sections, your report will contain the resource task load for all users and all projects in the system.
4. Click **Finish** to create the report.

The report results are written to the screen, unless another format is selected. The report displays tasks meeting the filter criteria, grouped by user, and containing the following columns from the workflow tab of the project:

Column	Description
Task Name	Displays the project name and its ID.
Project Name	Displays the project name and code; clicking on the link opens the summary page of the project (if your report administrator has configured the drill-back URL).
Dates	Displays the forecast/actual and target start and end dates.
Status	Displays the status of each task.
% Complete	Displays the current progress of each task.
Notes	Displays the notes for a task.

Column	Description
Condition	Displays a condition, based on the dates for a task. If the end date for a task is later than its target end date, this column contains one of two values: • **Late**: if status is **In Progress** or **Completed**, and **Forecast Start Date** is later than **Target Start Date**. • **Overdue**: if status is **In Progress** or **Completed**, and **Forecast End Date** is later than **Target End Date**. For all other tasks, this field is blank.

To run the Vendor Spend Summary report

The Vendor Spend Summary report displays total invoiced expenses for specified vendors in a specified date range, including breakouts for paid, approved and received expenses. This report requires the Financial Management Module.

1. Select **Analytics > Operational Analytics**.
2. In the list of reports, click **Vendor Spend Summary**.

   A screen appears where you can set filter criteria.
3. Specify filters for:
   - Vendor
   - Invoice date range (defaults to today's date)

   Note that both filters are required.
4. Click **Finish** to create the report.

The report is a summary of invoices by vendor, with three columns. The columns categorize the invoice totals by their status, as follows:

- The **Outstanding** column totals all invoices with a status of **Draft**.
- The **Payable** column sums all invoices with a status of **Payable**.
- The **Actual Spent** column sums all invoices with a status of **Paid**.

An example of the Vendor Spend Summary report:

	Outstanding (Draft)	Payable	Actual Spent (Paid)
All Selected Vendors	**$0.00**	**$100.00**	**$26,452.00**
CATER007 - Rebecca's Catering	$0.00	$0.00	$150.00
PRINT002 - Reactivity	$0.00	$0.00	$5,852.00
PRINT003 - Accenture	$0.00	$100.00	$13,500.00
SECC0011 - American Security	$0.00	$0.00	$6,250.00
SHIPP008 - Federal Express	$0.00	$0.00	$700.00

Single-object reports

The single-object reports are available from the **Analysis** tab of projects, programs, and plans. For these reports, you are reporting on that single object.

The following table describes both the standard single-object reports and the example Cognos 8 reports made available when the IBM Unica Marketing Operations reports package is installed.

Report	Description
Revision History	A report that lists the revisions made to the current object. This is the report you see by default when you click the Analysis tab of accounts, approvals, assets, plans, programs, projects, marketing objects, requests, teams, and invoices.
Approval Responses	A report for projects that displays information about approval tasks.
Invoice Summary List	A report for projects and programs that lists invoice summary information. This report requires the Financial Management Module.
Marketing Object Cross-Reference	A report for projects and marketing objects that lists the marketing objects referenced or modified by the current object.
Approval and Compliance Listing	An example Cognos report for projects that displays additional information about approval tasks.
Budget Summary	An example Cognos report for projects, programs, and plans that displays a summary of the budget by week, month, or quarter. This report requires the Financial Management Module.
Detailed Expense Breakout	An example Cognos report for projects that displays a breakout of the project expenses. This report requires the Financial Management Module.
Work Assigned	A report for teams that displays work assignments by team and by team member.

Related Topics

- To view the revision history of an object
- About the marketing object cross reference report
- To run the Approval and Compliance Listing report
- To run the Budget Summary by Quarter report
- To run the Detailed Expense Breakout report

To view the revision history of an object

After you work in an object for a period of time, you can view its revision history to see who created and modified the object, which fields were modified, and when the modification took place.

You can review the revision history for the following objects: accounts, approvals, assets, plans, programs, projects, requests, teams, and invoices.

1. Navigate to the **Summary** tab of an object to view its revision history.
2. Click the **Analysis** tab.

   By default, the page displays the revision history of the object, listing all modifications to the object since it was created.

   You can click **Revision History** in the **Report Type** pull-down menu to display the revision history if another report is displayed.

   Note the following:

   - For projects, click **Approval Responses** in the **Report Type** pull-down menu to display the revision history for any approvals linked to tasks within the project.
   - For approvals, an entry is created whenever the approval round number changes (when the approval owner requests re-approval for whatever reason).

     For example, if Connie Contact (approval owner) changes an approval and requests re-approval, an entry like the following is added to the revision history of the approval:

     Connie Contact on 12/15/2005 01:47:50 PM Approval Round #2: Approval was re-requested and the round number has increased.

To run the Approval and Compliance Listing report

The Approval and Compliance Listing report lists the approval processes for the workflow approval tasks of a project. It is separated into sections for current approval processes, completed approval processes, and approval processes scheduled to begin in the future.

1. Select **Operations > Projects**.
2. From the list of projects, select the one to report on.
3. Navigate to the **Analysis** tab of the project.
4. From the **Report Type** pull-down menu, choose **Approval and Compliance Listing**.

   The report displays on screen.

This report contains the following information:

Column	Description
Approval Process/Progress	Displays the task number, name, and progress for each approval process listed. Progress is described as how many approvals have been received out of the total number expected.
Items Being Approved	Displays a list of the items being approved.
Approvers	Displays a list of the approvers. For a required approver, displays (Required) next to the name of the approver.
Linked Task	Displays the task number and name of the workflow task linked to the approval.
Status	Displays the status of the approval: • **In Progress**: indicates an active approval process. • **On Hold**: indicates a temporarily halted approval process • **Completed**: indicates an approval process that is finished. • **Not Started**: indicates an approval process that has not yet been submitted for review.

To run the Budget Summary by Quarter report

The Budget Summary by Quarter report displays budget information by quarter for the selected project, program, or plan, and fiscal year. For programs and plans, data rolls up from contributing projects and programs. This report requires the Financial Management Module.

1. From the **Operations** menu, select:
   - **Projects** to run the report for a project.
   - **Programs** to run the report for a program.
   - **Plans** to run the report for a plan.
2. From the list, select the project, program or plan to report on.
3. Click the **Analysis** tab.
4. From the **Report Type** pull-down menu, choose **Budget Summary by Quarter**.

   The report for the current fiscal year displays. If there is data for more than one year, you can choose a different fiscal year for the report from the **Fiscal Year** pull-down menu.

Data is organized for the selected fiscal year, as follows:

Section	Description
Summary table	This table displays summary budget information: • Rows: different breakdowns of the budget; actual/remaining, committed/uncommitted, and forecast/available • Columns: Fiscal year total, then one column for each quarter. For projects, the report consists of only this table.
Details table	For programs and plans, this table shows budget information rolled up from subordinate objects. • Rows: for a program report, each individual project that is part of the program has its own row. Similarly for a plan report, each program has its own row. • Columns: Each quarter has columns for rollup budget, rollup forecast, rollup committed, and rollup actual.

To run the Detailed Expense Breakout report

This report requires the Financial Management Module.

1. Select **Operations > Projects**.
2. From the list of projects, select the one to report on.
3. Click the **Analysis** tab of the project.
4. From the **Report Type** pull-down menu, choose **Detailed Expense Breakout**.

   The report for the current quarter displays. If there is data for more than one quarter, you can choose a different quarter for the report from the **Fiscal Quarter** pull-down menu.

Data is organized for the selected quarter, as follows:

Section	Description
Accounts	Displays three columns (actual, committed, and forecast) of the budget information for the account. The data for each account is displayed on its own row. The first row contains summary data for all accounts.
Cost categories	Displays three columns (actual, committed, and forecast) of budget information. The data for each category is displayed on its own row. The first row contains summary data for all cost categories.
Vendors	Displays actual money spent per vendor. There is one row per vendor, and the first row presents summary data.

To run the Work Assigned to Team or Team Member Reports

You can view the approvals, projects, project requests, and tasks associated with a team as a whole or with a specific team member.

1. Navigate to the **Analysis** tab of a team.
2. Select the report type and work assignment (approvals, projects, project requests, or tasks). If you select the Work Assigned to Team Member report, also select the team member.

   The report is displayed.

The following information is available.

Section	Description
Name	Displays the name for approvals, project requests, and tasks; clicking on the link opens the summary page of the work assignment (if your Report Administrator has configured the drill-back URL).
Project Name	Displays the project name for projects; clicking on the link opens the summary page of the project (if your Report Administrator has configured the drill-back URL).
Project Code	Displays the project code for approvals, projects, and tasks.
Project Owner	Displays the project owner for approvals and tasks.
Requester	Displays the requester for approvals and project requests.
Task Owner	Displays the task owner for tasks.
Request ID	Displays the ID for project requests.
Approver	Displays the approver for approvals.
Status	Displays the status for approvals, projects, and tasks.

Marketing Operations list portlets

This section describes the standard Marketing Operations portlets that are available for use on dashboards even if the Marketing Operations reports package is not installed.

Report	Description
My Active Projects	A list of active projects for the user viewing the report.

Report	Description
My Alerts	A list of the Marketing Operations alerts for the user viewing the report.
Approvals Awaiting Action	A list of approvals awaiting action by the user viewing the report.
My Tasks	A list of tasks owned by the user viewing the report.
My Requests	A list of requests owned by the user viewing the report.
Projects over Budget	A list of all projects that are over budget for the calendar year. This report requires the Financial Management module.

Marketing Operations IBM Cognos report portlets

This section describes the Marketing Operations dashboard portlets that are available in the Marketing Operations reports package.

Report	Description
My Task Summary	An example IBM Cognos report showing data about all active and completed tasks for the user viewing the report in all In Progress projects.
My Approval Summary	An example IBM Cognos report showing data about active and completed approvals for the user viewing the report.
Manager Approval Summary	An example IBM Cognos report showing data for active and completed approvals for all In Progress projects in the system.
Projects by Project Type	An example IBM Cognos report showing a 3-D pie diagram that shows all In Progress projects in the system by template type.
Projects by Status	An example IBM Cognos report showing a 3-D bar chart that shows all projects in the system by status: draft, in progress, on hold, cancelled, and finished.
Manager Task Summary	An example IBM Cognos report showing data for active and completed tasks for all In Progress projects.
Marketing Financials Position	An example IBM Cognos report showing a timeline with Budget, Forecasted, Committed, and Actual amounts for all plans in all states in the current calendar year. This report requires the Financial Management module.

Report	Description
Spend by Project Type	An example IBM Cognos report showing a 3-D pie chart of the actual amount spent per project type in the current calendar year. This report requires the Financial Management module.
Completed Projects by Quarter	An example IBM Cognos report showing a 3-D bar chart of the number of early, on-time, and late projects completed this quarter.
Projects Requested and Completed	An example IBM Cognos report showing a timeline graph of the number of project requests and number of completed projects per month. This report only counts project requests with the following states: Submitted, Accepted, or Returned.
Forecast by Project Type	An example IBM Cognos report showing a 3-D pie chart of the forecasted spending per project type for the current calendar year.
Budget by Project Type	An example IBM Cognos report showing a 3-D pie chart of the budget per project type for the current calendar year. This report requires the Financial Management module.

18 Searches

About searches

You can perform two kinds of search in IBM Unica Marketing Operations: simple and advanced.

You can perform a simple or advanced search for plans, programs, projects, tasks, assets, approvals, marketing objects, and invoices from any view in the corresponding section of IBM Unica Marketing Operations. Searching in the Programs section retrieves only programs; searching in the Projects section retrieves only projects, and so on.

Simple searches

IBM Unica Marketing provides a simple search function that enables you to search for most objects, including plans, programs, projects, assets, approvals, tasks, and invoices. You can perform these searches using the **Search** field in the menu bar at the top of the IBM Unica Marketing window. For details on this search function, see the *IBM Unica Marketing Platform Administrator's Guide*. You can use this seach to search for most objects, including plans, programs, projects, assets, approvals, tasks, and invoices.

Advanced searches

IBM Unica Marketing Operations also provides an advanced search function that enables you to specify more complex searches based on several different criteria that apply the type of items for which you are searching. You can save commonly used advanced searches to save time.

Advanced searching works the same for all objects except assets. Marketing Operations provides one type of advanced search page for assets, and a different type for all other objects that contain advanced search functionality.

Permissions considerations

When you search for an object, IBM Unica Marketing Operations always conducts the search against all the objects the user has security rights to view (for example all projects). This occurs even if you initiate the search from within a filtered view, such as the Active Projects view, or from within a saved search.

For example, if you do not have access to the Workflow tab of a project template, tasks from the project created from that template do not appear in the results of an All Tasks search even if you are a member (Owner/Participant/Requester) of the project. However, if one or more tasks from that project are assigned to you, then those are displayed irrespective of your access rights.

Related Topics

- To perform an advanced search of a digital asset library
- To perform an advanced search (except for assets)

About searching within grids

In advanced search, grid attributes appear in the list of available attributes to add to a search for all project templates that are enabled, whether or not any projects or marketing objects exist that have been created from that template.

For example, assume your system contains the following:

- A project template named Tradeshow, and this template is enabled.
- A tab named Vendors is available for Tradeshow templates.
- The Vendors tab contains a grid, and one of the grid columns is named Vendor URL**.**

On the advanced search screen for projects, you can select Vendor URL when you choose a condition for the search. Note that the Vendor URL attribute appears in the list, even if your system does not contain any Tradeshow projects.

When a template is deleted, its grid attributes are no longer available as search criteria. You can search for attributes in a disabled template; choose a disabled template (or **All Disabled**) from the advanced search screen.

Related Topics

- About the Not In operator

About searching for marketing object attributes

You can search for attributes contained in a linked-to marketing object, from marketing objects or projects. For example, suppose you have projects that link to marketing objects that in turn contain an attribute for which you want to search:

- You have projects of type Marketing Collateral, which can link to
- Marketing objects of type Creatives, which contain an attribute
- **Cost**, representing the cost of the creative.

From the project page, you can perform an advanced search which returns projects based on criteria you specify about the Cost attribute.

To perform an advanced search of a digital asset library

The advanced search for assets allows you to search for information in specific fields that the owner filled out when creating or modifying the assets.

1. Select **Operations > Assets**.
2. Select a digital asset library to search
3. Click the **Search/Filter** icon ().

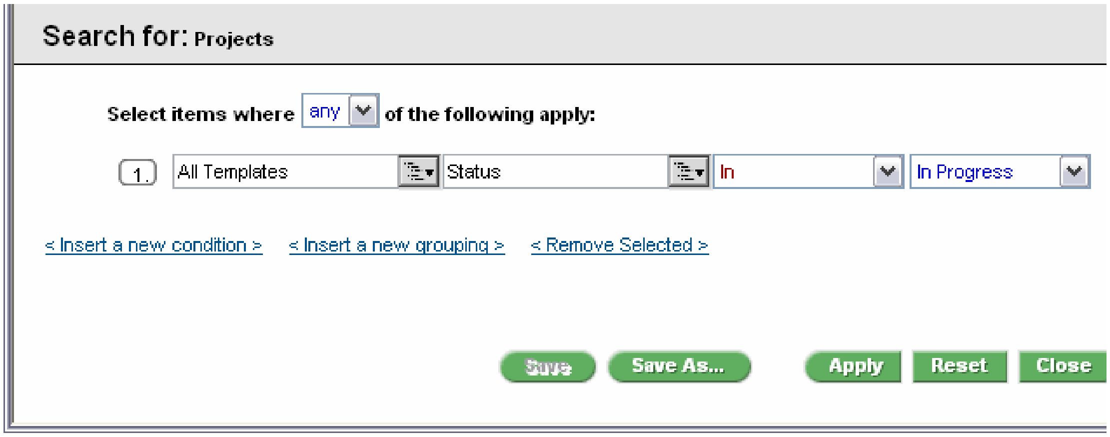
   The Assets Search screen appears.
4. Fill in one or several of the fields, depending on what you want to search for.
5. Click the **Search** button.

The items meeting the search criteria are displayed on the Assets list page.

To perform an advanced search (except for assets)

1. Open the list page of the object type for which you want to search (for example, projects, tasks, and so on).
2. Click the **Search** icon ().

   The Advanced Search page appears:



3. In the first field, choose a template or templates on which to base the search. In addition to each template, the list contains groups of templates: All Templates, All Enabled, and All Disabled.
4. In the second field, choose an attribute on which to base the search. Attributes are grouped by object type. For example, if you are searching for projects, project attributes are listed first, then the attributes for each type of marketing object are listed, grouped by marketing object type.
5. In the third field, choose an operator for the search. The available operators depend upon the type of attribute selected for the search.
6. In the fourth field, enter a value.
7. Repeat steps 3 to 6 as necessary to construct your advanced search.
8. Optionally, click **Save as** to save the search. Administrators can also publish the search by selecting the **Publish** checkbox on the Save As dialog box. Published searches are available to all Marketing Operations users.
9. Click **Apply** to perform the search based on your criteria.

Related Topics

- Disabled attribute values in searches

To regroup and reorder search criteria

As you construct search criteria, you can rearrange the grouping and order of any individual search condition:

1. For the condition you want to move, position the cursor over the condition's number box.

   Note that the cursor changes to a double vertical arrow, and the tool tip displays "Drag to move this condition to another place in the query."
2. Drag the condition to where you want to insert it. Note the red guide line, showing where the condition will be inserted.

3. Once the condition is positioned correctly, release the mouse to drop it into its new location.

> You can drag and drop search criteria at any level.

About the Not In operator

Background

IBM Unica Marketing Operations objects (plans, programs and projects) are created from templates.

Templates have definitions of attributes, for example, **brochure_type**. Project instances created from the same template could have different values for their attributes. For example, TS001 might have **Tri-fold** as its brochure type, and TS002 could have **Bi-fold**.

In a typical IBM Unica Marketing Operations installation, there are multiple project templates, and a particular attribute might be present in some templates and absent in others.

The behavior of the Not In operator

The operator, **Not In**, returns all instances of objects (for example, projects) that do not have the value of the attribute as given in the search, or if the object does not have the attribute itself. To illustrate, if you search for **all Fruits that do not have black colored seeds**, this search returns fruits that do not have black colored seeds **AND** fruits that are seedless, since seedless fruits do not have black colored seeds.

Consider the following example:

- Template1 has a custom tab, **Business**, that contains the attribute **BusinessUnit**.
- Template2 does not have the **Business** custom tab (hence it does not contain the **BusinessUnit** attribute).
- Two projects are created from Template1:
  - Project1 is created with "Insurance" as the value for BusinessUnit.
  - Project2 is created with "Banking" as the value for BusinessUnit.
- Two projects are created from Template2: Project3 and Project4.

Assume you create a search with the following criteria:

```
[All Templates] -> [BusinessUnit] -> [Not In] -> [Insurance]
```

This search returns Project2, Project3, and Project4, since none of these projects has BusinessUnit = Insurance.

Assets advanced search page

When you click Advanced Search on a digital asset list page, the system displays a page with the following fields.

Field	Description
Asset Name	Allows you to search in the **Asset Name** field of all existing assets. IBM Unica Marketing Operations searches for all asset names that contain the text string you enter. You can use the following standard wildcards. • * - to search for any string • ? - to search for any character.
AND OR	Allows you to choose a Boolean operator. • **AND:** to return items containing all the words in the **Asset Name** field. • **OR:** to return items containing any of the words in the **Asset Name** field.
Asset Code	Allows you to search in the **Asset Code** field of all existing assets. IBM Unica Marketing Operations searches for all codes that contain the string you enter.
Description	Allows you to search for text in the **Description** field of all the existing assets. IBM Unica Marketing Operations searches all the description fields for the characters you enter.
Status	Allows you to select any or all of the statuses to search; Draft, Finalized, or Locked.
Expires Before	Allows you to specify a date. IBM Unica Marketing Operations searches for all assets with expiration dates on or before the specified date.
Folder Name	Allows you to enter part or all of a folder name to search. IBM Unica Marketing Operations searches for all folder names that contain the text string entered and searches for assets in that folder.
Keywords	Allows you to search in the Keywords field of all existing assets. IBM Unica Marketing Operations searches for any of the keywords that contain the text string you enter.
Owners	Allows you to select one or more owners to search for assets belonging to the selected owner(s).
Version Name	Allows you to search in the **Version Name** field of all existing assets. IBM Unica Marketing Operations searches for all versions that contain the text string you enter.
Usage Guidelines	Allows you to search in the **Usage Guidelines** field of all existing assets. IBM Unica Marketing Operations searches for all usage guidelines that contain the text string you enter.

Advanced search page for objects other than assets

When you click Search on the list page for most IBM Unica Marketing Operations objects, the system displays a page with the following information.

Control	Description
Search for	Displays text indicating the objects for which you are searching. For example, if you are searching for programs, the dialog displays **Search for: Programs.**
Select items	Determines whether the search needs to match all or any of the search criteria. Options are: all, to specify that the search must meet all search criteria, or any, to specify that the search can match any of the search criteria. The default is all.
Condition	Allows you to construct a search condition by specifying the following. • From the first pull-down list, select the template on which to base the condition. • From the second pull-down list, select the attribute for which you want to search. Possible values are: Project Name, Owner, Description, etc. • From the third pull-down list, select the search operator. • In the fourth field, enter the value for the criteria. For example, if you are searching for projects, and want to find project names that include the word Marketing. • Select **All Enabled** to search on all enabled project templates • Select **Project Name** in the second pull-down, • Select **Contains** in the third pull-down, and • Type **Marketing** in the fourth field.
Grouping	Allows you to construct a grouping for the search results by specifying the following. • From the all/any pull-down, select all or any, to determine whether to use all or any of the grouping criteria. • Fill in the remainder of the grouping criteria as described for constructing the Condition.
Insert a new condition	Click to insert a new line for entering a condition.
Insert a new grouping	Click to insert a new line for grouping the search criteria.
Remove selected	Click to remove any selected conditions or groupings.
Save as	Click to save your criteria as a named search. You are prompted to enter a name for the search. Additionally, IBM Unica Marketing Operations administrators can publish a search by selecting the **Publish** checkbox.

Control	Description
Apply	Click to perform the search based on the criteria specified.
Reset	Click to reset the dialog box, clearing any criteria already specified.
Close	Click to close the dialog box without performing a search.

About saved searches

You can save any advanced search by clicking the **Save As** button on the Advanced Search page. Saved searches are available only for plans, programs, projects, and marketing objects.

There are two types of saved searches: unpublished and published. Unpublished saved searches are available only to the user who saved it. Published saved searches are available to all users. Only a Unica administrator can publish saved searches.

Accessing saved searches

After you save a search, you can access the search and rerun it with the same criteria, or delete it. You can access saved searches in two ways:

- On the **Action** icon's menu on the object’s list page
- On the list page itself when you view all objects of that type by selecting **All [item]** in the **Action** menu

For example, saved searches for projects are available on the Projects List page when viewing all projects and requests. If your system contains any published saved searches, they are listed along with your unpublished saved searches.

Setting the sort order in saved searches

When you save a search, the sort column and sort order that exist on the page from which you are searching becomes the default sort order in the saved search.

Note that, if you create a saved search from another saved search that has optional columns, the optional columns are not included. Thus, if the sort column in the original search was an optional column, in the second saved search, the sort column reverts to the default, as the sort column does not exist in the new saved search.

You can change the sort column and sort order of an unpublished search by changing the sort column and sort order of the list page, accessing the saved search, and clicking **Save**, which updates the search. This applies only to unpublished searches. To change the sort column and/or sort order of a published search, a Unica administrator must first unpublish the search, change the sort as described above, and then re-publish the search.

To view a saved search

1. Open the list page for an object type.
2. Click **All <*objects*>** (where *objects* are projects/requests, programs, or plans.)

   Your saved searches and all published searches appear as folders at the top of the screen.
3. Click on the folder that contains the search results you want to view.

   Saved searches are also available from the Actions icon menu.

To delete a saved search

Note that you cannot delete a saved search that is any of the following.

- Created by another user
- A default calendar, project, or task search
- A system search
- Published
- The search the user is currently using

1. Open the list page for an object type.
2. Click the **Actions** icon () and click the checkbox next to the search or searches you want to delete.

   You can delete only your own saved searches; you cannot check boxes for any other searches.
3. Click **Delete Selected** to remove your selected saved searches.

19 Alerts and the message board

About alerts and the message board

Alerts and the message board both allow you to communicate information to other users of IBM Unica Marketing Operations.

Alerts and the message board are available for the following objects: plans, programs, projects, requests, assets, accounts, approvals, invoices, tasks, teams, and marketing objects.

Related Topics

- To subscribe to alerts for an object
- Brief and detailed task alerts

Alerts

You can use alerts to communicate information to specific people about the state of an object or about an action that the user needs to take. Default alert subscriptions are set by administrators, but can be overridden on a per-object basis by owners and participants of the specific objects.

For workflow tasks, alerts are either brief or detailed.

Related Topics

- Brief and detailed task alerts
- To subscribe to alerts for an object
- About adding comments for alerts

Message board

The message board allows you to communicate information to the other members of the team or to an object owner.

Viewing alerts

When you receive an alert, go to the Alerts page to view it. Alerts are also sent to affected users' e-mail addresses (for each user that has a valid e-mail address set up). For a detailed list of events that could trigger an alert and for more information on setting up alerts, see the *IBM Unica Marketing Operations Administrator's Guide*.

To view alerts, log in and click the Alerts icon (). Clicking on, or scrolling over the alerts icon shows a drop down menu seperating the alerts for your installed applications. The number of alerts appears to the left of each application name. Once you choose which application's alerts to view, the page displays the following information:

Column	Description
Page heading	Contains the number of unread alerts (which appears in parentheses) and the total number of alerts
Check box	Each alert contains a check box; use check boxes to select alerts for a specific action (for example to mark a group of alerts for deletion). Check the box in the first line (next to the Message Text label) to select all the alerts.
Message text	Displays the text of the alert.
Date/Time	Displays the time of the event that triggered the alert.

You can perform the following actions from the page.

Link/Button	Description
	Select the yellow envelope icon next to an alert to mark the alert as read. After you click the icon, the alert is grayed out. Reselect the icon to mark the alert as unread.

Link/Button	Description
Alert title	Click the link in the alert to go to the object that is the subject of the alert. The Alerts page remains open while you view the information in a separate window.
Pages	Click a page number to list the corresponding page of alerts.
Delete Selected	Click to delete the selected alerts.
Delete All	Click to delete all of your alerts.
Mark All as Read	Click to mark all your alerts as read, graying out each alert. A confirmation screen appears to ensure you wish to mark all alerts as read.
Mark All as Unread	If you have no unread alerts, click this link to mark all your alerts as unread.
Close	Click to close the Alerts page.

Receiving alerts when outside the organization's domain

If your email address is outside the domain of the organization that has IBM Unica Marketing Operations installed, you need to modify your SMTP server in order to receive alerts. Add the IP address of the Marketing Operations server to the relay allowed IP address list.

About adding comments for alerts

For many events, the system sends out alerts based on actions users perform. For example, when a project owner starts a project, the system sends out alerts to project members.

In this example, before the system sends the alert, the project owner can add comments to the alert. The system provides a dialog box containing the text of the alert. The user can enter any additional comments to the alert. When the user closes the dialog box, the system sends the alert, including the comments.

For the following events, users can add comments to the alert before the system sends the alert.

Object	Events
Project request	• A project request is submitted. • A project request is accepted. • A project request is returned. • A project request is cancelled.
Project	• A project is started. • A project is put on-hold. • A project is restarted. • A project is completed. • A project is cancelled. • A project is put in not started state.
Program	• A program is started. • A program is put on-hold. • A program is restarted. • A program is completed. • A program is cancelled.
Plan	• A plan is started. • A plan is put on-hold. • A plan is restarted. • A plan is completed. • A plan is cancelled.
Approval	• An approval process is started. • An approval process is put on-hold. • An approval process is restarted. • An approval process is complete. • An approval process is cancelled
Asset	• An asset is drafted. • An asset is locked. • An asset is finalized. • An asset is archived.
Invoice	• An invoice is marked as payable. • An invoice is marked as paid. • An invoice is re-drafted. • An invoice is cancelled.
Marketing object	The status of a marketing object has changed.

To subscribe to alerts for an object

You can override default settings within a plan, program, project, or project request even if you are not an administrator, which allows you to control the alerts that each object owner and participant receives. However, if there are permissions configured for any of the tabs of a project or request, the system filters alerts appropriately. For example, alerts about attachments are not sent to users who do not have access to a project's Attachments tab.

1. Open the object for which you want to change alert subscriptions.
2. Click the **Communicate** icon () and select **Subscribe to Alerts** from the drop down list.
3. From the list of alerts, select the checkboxes that correspond to the alert that you want to change. You can set or clear alert subscriptions for each type of user, **Owner**, **Participant**, and so on. The possible entries are as follows:
   - Checkmark: indicates the user will receive the alert or alarm
   - Blank: indicates the user will not receive the alert or alarm
   - n/a: indicates you did not specify team members for this access level (for example Program Participant) when you created the object. Once you add a team members with the corresponding access level, you can set alerts for that access level.
4. Click **Accept** to save your changes or **Cancel** to leave the alert settings as they were.

Brief and detailed task alerts

When someone makes edits to a workflow, they may make numerous edits that affect several tasks, members, dates, and so on. IBM Unica Marketing Operations allows you to determine whether users should receive detailed or brief alerts (via notification by e-mail and within Marketing Operations) about the workflow changes:

- Brief mode: The notification informs users that changes have been made to the workflow. In certain cases, the field changed and new value are shown.
- Detailed mode: The notification contains a section for each task that has been changed. For each change, both the previous and current values are listed in the alert.

Determine the correct level of information, and set the **Detailed workflow change notification** alert accordingly.

Note the following:

- If a project is set up to deliver detailed alerts to owners and participants, any changes to workflow tasks leads to a detailed alert being sent to project owners and affected task members (that is, specific participants who are task members). In this case, brief alerts related to workflow tasks (such as Task Assigned or Task Started) are not sent.
- If a project is set up to deliver detailed alerts to owners only, then changes to workflow task rows lead to a detailed alert being sent to project owners only. Affected task members (project participants) receive brief alerts.

Related Topics

• Examples of brief and detailed alerts

Group events that contribute to detailed alerts

In addition to edits made to the workflow itself, a few other actions can lead to task alerts being sent, if a project is set for detailed alerts.

Tab	Actions
People	• If a user uses the find and replace functionality to make changes to a workflow, IBM Unica Marketing Operations sends an alert to both the previous and new task owners. • If a user clicks **Assign work by role**, Marketing Operations sends an alert to each user assigned (or un-assigned) tasks.
Tasks	• If a user clicks **Complete Selected**, **Skip Selected**, or **Reassign Selected**, IBM Unica Marketing Operations sends an alert that indicates the affected tasks. • If a user edits a task from the screen, Marketing Operations sends an alert indicating the changes to the task.
Teams	If a team manager or member reassigns tasks, IBM Unica Marketing Operations sends an alert to both the previous and new task owners.
Approvals	If a user edits an approval task that is part of a workflow, IBM Unica Marketing Operations sends an alert indicating changes to the task.

Examples of brief and detailed alerts

The following example depicts an email a user might receive if the project is set up to deliver detailed alerts.

```
Subject: Project workflow updated: "Project 0004 (TRS1022)"
Project workflow updated: "Project 0004 (TRS1022)"
By: asm admin
When: Monday, October 15, 2007 at 1:38:24 PM EST
Task : 1.1 Determine objectives and theme (Task Code : <empty>)
```

```
Target Start changed to 11/01/2007 09:00:00 AM from 10/17/2007
09:00:00 AM
Notes changed to My Added new notes...... from Added new notes
% Complete changed to 6 from 3
Target End changed to 11/05/2007 05:00:00 PM from 10/19/2007
05:00:00 PM
Members changed to rm_user3, rm_user2, from asm admin
Task : 1.2 Estimate costs (1.1,1.1) (Task Code : <empty>)
Target Start changed to 11/06/2007 09:00:00 AM from 10/22/2007
09:00:00 AM
Notes changed to My Added new notes...... from Added new notes
% Complete changed to 25 from 10
Target End changed to 11/07/2007 05:00:00 PM from 10/23/2007
05:00:00 PM
Members changed to rm_user3, rm_user2, from asm admin
:
:
Click
http://svr01:7001/plan/affiniumplan.jsp?cat=projectworkflow&projectid
=103 to go to project.
```

The following example depicts an email a user might receive if the project is set up to deliver brief alerts:

```
Subject: Project workflow updated: "Project 0004 (TRS1022)"
Project updated: "Project 0004 (TRS1022)"
By: asm admin
When: Monday, October 15, 2007 at 1:38:24 PM EST
Comment: "Workflow" tab updated.
Description: Tradeshow for 1st Mutual Bank of Fred
Click
http://svr01:7001/plan/affiniumplan.jsp?cat=projecttabs&projectid
=103 to go to project.
```

Configuring task alert level

Your administrator may have selected the **Detailed workflow change notification** alert. If so, by default, all projects send detailed alerts. Project owners and members can override the default setting on a per-project basis, by changing the setting for the **Detailed workflow change notification**, located in the alert subscription window for each project.

Related Topics

- To subscribe to alerts for an object

To post a message on the message board

The message board allows you to post or read messages about a particular plan, program, project, asset, account, approval, or invoice. You can use this as a method of communicating information about the object. When you post a message to the message board, any user who has permission to access that object can view the posted message.

1. Open the list page for the object type of the object for which you would like to post a message. For example, click **Operations > Accounts**. (You can post messages for plans, programs, projects, assets, accounts, approvals, or invoices.)
2. Click the plan, program, project, account, approval, or invoice for which you want to post a message.
3. Click the **Communicate** icon () in the IBM Unica Marketing Operations toolbar and select **Post a Message**.

   The Messages window appears.
4. Enter your message in the text box.
5. Click one of the radio buttons.

   Note that by default, you also receive an e-mail alert when you post a message.
6. Click **Post Comment**.

   The Messages window displays all the posted comments for this object. Your new comment appears at the top of the list.

   If you chose an e-mail option, your message includes a line listing the e-mail recipients, similar to the following:

   (cc'd to Mary Manager, Connie Contact, aartiste@unica.com)

   The system displays names for users whose names are stored in IBM Unica Marketing Platform. If this information is not in the platform, the system uses the e-mail address.
7. Click **Close** if this is the only comment you want to post now or click **Post a Comment** to post an additional comment.

   IBM Unica Marketing Operations posts the message to the message board and sends any e-mail messages you instructed it to send. The messages contain the text of the message posted on the message board as well as a link to the object (plan, program, project, and so on) where the message was posted.

To read a message on the message board

You can read messages that were previously posted to the message board, if you have permission to view that object. Messages can be posted for plans, programs, projects, assets, accounts, approvals, or invoices.

1. Open the list page for the object type of the object for which you would like to read a message. For example, click **Operations > Accounts**. (You can post or read messages for plans, programs, projects, assets, accounts, approvals, or invoices.)
2. Click the plan, program, project, asset, account, approval, or invoice whose messages you want to read.
3. Click the **Communicate** icon () and select **Read Messages**.

   The Messages window appears, displaying all the messages on the message board for that object.
4. Click **Close** to exit the message board or click **Post a Comment** if you want to respond to a posted message.