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MRM - Full User Guide

KL Support - 2017-03-15 - Marketing Resource Management (MRM)
MARCOM PLATFORM
Admin Manual

Abstract

This document describes how general setting and metadata setting can be configured through Administration to setup marcomplatform for a new client.

Introduction

BrandSystems was founded in 1999 by an innovative group of professionals with a background in graphic design, advertising, marketing and branding. From the earliest days of MRM, we have designed the Solutions we would like to use, and over the past decade our products have been tweaked and refined. BrandSystems is the leading company within Marketing Resource Management in Scandinavia.

The result is an elegant and sophisticated MRM Solution with the best graphic user interface on the market. We specialize in solving marketing departments‟ challenges by combining communication process skills with state of the art marketing technology.

BrandSystems MRM solutions enable:

• Streamline communications
• Easily control every step of the marketing process
• Plan and budget campaigns
• Reuse campaigns, thoughts and projects
• Approve productions in predefined processes
• Analyze the results of marketing campaigns

Purpose:

The purpose of this manual is to help BrandSystems MRM registered users enhance their use and understanding of the software. To that end, the manual provides descriptions, definitions, and step-by- step instructions, but is not intended to replace formal MRM training. Each BrandSystems MRM instance is unique in the way the system has been configured for the client‟s business environment. Therefore, some functions or segments contained in this manual may not be applicable to your specific system and some screenshots may vary from what is shown here.

Legal:

Contact:

For further information or questions or offer or suggestions, please contact us as referred below.

BrandSystems AB Svarvargatan 11
Box 49031
100 28 Stockholm Sweden
+46 8 410 135 95

BrandSystems Private Ltd
#29, “Empire Infantry” Ground Floor Infantry Road Bangalore 560 001
India
+91 80 4210 9714

Administration

BrandSystems MRM software centralizes control of diverse marketing activities across the business enterprise. You can define marketing plans by creating and assigning resources, entity types, task flows, and other components. Build in efficiency through systemizing best practices and business rules and securely managing multiple versions of graphics online. Valuable marketing information can be stored, accessed and updated in real-time. To assist in understanding progress and status, straightforward dashboards give a high-level view while more detailed analysis can be conducted through queries and custom reports.

The Administration component allows you to change and manage a range of general system settings, metadata settings and custom features that take effect across the system, and can only be viewed by administrators.

Warning: You should not delete or alter items in the Administration section unless you are confident in your actions. Please consult BrandSystems or Technical partners if you are uncertain of what to do.

Use this Administration manual (in combination with the other BrandSystems MRM system manuals) to learn how to:
• Configure the system through general settings
• Create and manage custom data
• Create and manage task flow
• Create and manage reports
• Create and manage users / access group
• Create and manage dashboard
• Manage financial settings

From the Administration section you are able to:
• Edit the system configuration
• Add and edit values to the different sections of data management
• Add and edit task flow templates
• Manage the marketing intelligence areas of the system
• Edit the user access and group security
• Manage the report functionality
• Manage the notifications settings
• Manage the email alert settings
• Manage the language settings
• Manage the root /detailed level filter settings

Admin settings have been categorized as two parts which is “General settings” & “Metadata settings”. Where general settings would help user to define general settings of Marcom platform and metadata settings would help user to define entity type, attributes and options for each metadata.

General Settings

This section describes what are the settings are available in general settings and how it can be configured.

Overview: The general Settings section allows you to change general information relating to the system set up. The page lists settings ranging from user security settings and terms and conditions to text displayed at the bottom of system generated emails.

General Settings: This is where client logo, Navigation main menu settings, Additional settings which includes to define system default date format, Administrator email, Defining statistics, Gantt view header bar and broadcast message which will be sent out to all the users when they log in to the system.

User & Access Settings: This is where new user, password settings are set such as time zone, start page and access rights, complexity, defining API users, Approval of new user request, Access of module which presented in platform and defining SSO users etc.

Administration Email: This is the email address that any system generated administrative emails will be sent from and approval of new user request. This should be set to the system Administrator. This will need to be updated if there is a change in System Administrator.

Financial Settings: This is where financial settings of adding & defining currency type, enable / disable forecasting, defining forecasting calculation etc…

Dashboard Settings: Select the widget type and each widget template settings with access.

Language Settings: Choose the system language, and add new language to apply in to the system.

Broadcast message: The broadcast message section allows administrators to add or edit messages that can either be posted on the home page of the system or emailed to user groups. Announcements can be used to communicate to all users about system-wide changes or any other relevant information such as links to other sites, or to training materials.

Task Settings: This is where task list library can be created with predefined tasks with attachments and where task template can be created and associated with any campaigns, plans and activities.

Report Settings: This is where credentials management, custom view can be created and system defined reports can be created and associate with the system.

Metadata Settings: This determines a wide range of any entity settings such as plans, campaigns and activities with attributes.

Attributes can be created and associated with any kind of entities.

1. Title & Logo

a. In this settings, where admin user can upload a client logo when they setting up a platform for a new client.

b. Administration -> General Settings -> General Settings -> Title & Logo

c. Title section, user can enter any text like client name. When user mouse over on the logo this text will be shown as tool tip.

d. Logo section, by clicking select image the logo image can be uploaded. This image will be available in login page & inside the application left corner side.

Screen shot:

2. Navigation

a. Navigation is categorized as two parts.

i. Main navigation

1. This would help user to define main navigation menu and to display the respective page.
2. By clicking Add button in this section, the popup will be open up to fill necessary details.
3. The name which provided in “Caption” will be the name of menu.
4. User can choose which module this menu belongs to. At present the module state only with “Planning tool”.
5. All “Feature” will be listed out based on the “module” selection.
6. Description can be given as per the menu.
7. URL will provide to load the respective page. Example, if it‟s a Plans then URL will be given as “Plans” to load the respective page when user clicks the menu.
8. Add username, Add user email, Add user id, Add language will be selected for SSO functionality.
9. Click Save button the menu will be added.

Screen shot to add navigation menu

ii. Sub Navigation

1. If at all any main navigation menu need a sub menu under it, through this section it can be achieved.
2. By clicking Add button in this section, the popup will be open up to fill necessary details.
3. The name which provided in “Caption” will be the name of the sub menu.
4. The entire main navigation menu will be listed out “Parent navigation” to choose under which menu this sub menu should be appeared.
5. User can choose which module this menu belongs to. At present the module state only with “Planning tool”.
6. All “Feature” will be listed out based on the “module” selection.
7. Description can be given as per the sub menu.
8. URL will provide to load the respective page. Example, if it‟s a Plans then URL will be given as “Plans” to load the respective page when user clicks the sub menu.
9. Add username, Add user email, Add user id, Add language will be selected for SSO functionality.
10. Click Save button the sub menu will be added.

Screen shot to add sub menu:

b. Sorting Option for Navigation menu / sub menu:

Sorting option feature is enabled for main / sub menu navigation to define / set the display order in the main menu. This is applicable for sub menu as well when it has more than one sub menu under one main menu.
By click and move the row change the order of main menu.

3. Financial Settings

a. PO Settings

i. PO settings would help user to define predefined settings for purchase order and invoice.
ii. Prefix will state how the PO order number should start. Example, PO / PO - / Po etc…

iii. Date time format to set how the date time format needs to look like, yy / y / mm-dd-yy etc…
iv. Number of digits to set how many digits the PO number should have as part. Example 2/3/4/5 etc…
v. Starting number to set from which number the digits should start. Example, 2000 / 3000 / 4000 etc…
vi. Current running number would display what is the number is running in the system at present like 1000.
vii. Example of Purchase order number “PO 2013-12-19 2001” (Prefix, Date, 4 digit number which starts from 2001).
viii. When user provides the first time, then generate button should be clicked. While editing the save button to be clicked.

Screen shot:

b. Financial forecasting settings

i. User can enable / disable financial forecasting from the system by selecting enable financial forecast.
ii. User can choose the division for forecasting like yearly, monthly, quarterly and weekly.
iii. User can add new currency and edit existing currency as well.

Screen shot:

4. Additional Settings:

Additional settings will help user to define Admin email, date format and currency type in the system.

a. Admin email

i. Define admin user or approval authority to approve when external / internal user register for a new account from outside of the application. So when new user registered the admin user would get an email of registered user details to approve / reject. Multiple admin user email id can be defined here. After entered the mail id, click save button to activate.

b. Date format

i. Based on the client need /demand, the date format can be defined. This defined date format will be followed in entire system. Example, yyyy-dd-mm / mm-dd-yy / m-d-y etc… After choosing the date format, click update to activate.

c. Currency type

i. Based on client demand / need, the currency type can be defined. This currency type will be followed in entire system. Example, EUR, SEK, GBP etc… After choosing the currency type, click update to activate.

Screen shot:

5. Language Settings:

a. In language settings, the language can be created from default language based on client need / demand.

b. After language creation, by clicking view user will be able to enter the language based on language created.

Screen shot:

7. Newsfeed Settings:

a. Where admin user can define filter options of newsfeed in overview page.

Screen shot:

8. Broadcast Settings:

a. Where admin user can broadcast message to all the users at a single time.

Screen shot:

User & Access Settings

This section describes how user can be created, how roles can be added, how user request can be approved and how the module based role can be defined.

1. User

a. Here new user can be added by clicking “Add” button.

b. First name, last name, password, email id, language, time zone (based on client), user start page (plan, cost centre, objectives, dashboard etc…).

c. Role can be given to a user. Like, Admin, editor, viewer etc…

d. Click save to add a user in to the system.

Screen shot:

Filter Options:

a. Filter option is provide to admin user where they can type and check the user details when lot of users are available.

Screen Shot:

2. Role

a. Role categorized as Global role and global access.

b. Global role to create roles and assigned to the user.

c. Global access to assign access to a role like creates, edit, read, and delete access.

d. Clicking add button, in global role the new role can be added.

e. By clicking add button, the global access can be assigned to a created role based on module.

Screen shot for adding role:

3. User Request

a. When any user requested for an new account by clicking user registration then this page will have user details for approval / rejected.
b. Admin user (admin email which is defined in additional settings -> Admin email) would receive a mail.
c. Admin user can select the user and either click approve / reject.
d. The history will be shown in the approval history to see which user has been approved / rejected.

Screen shot:

4. Module

a. Module would be system defined and this will be used when assigning global access to global role.

b. User can choose role based on module to provide access like create, delete, edit and read etc...

Screen shot:

Planning tool Settings

Planning tool settings define module setting where as user can set root level, tree view, gantt, list view, root level filter and detailed filter settings.

1. Root level settings

a. Root level settings define what are the metadata should be displayed in root level such as plans and cost centres.

b. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

c. Based on this selection, the fields are appeared in the available attributes.

d. User can drag fields from available attributes to selected attributes to show metadata in root level.

e. After moving attributes from available to select then click save button to enable it.

Screen shot:

2. Tree view Settings

a. Tree view settings to define levels should be appeared under plan in the tree view. If none of them are selected from left side to right side then the any entity name will not be appeared in tree view.

b. Sometimes user want to see only plan level & master level though plan has lot of sub levels. Admin user can choose only plan & master level to display in tree view.

c. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

d. Based on this selection, the level will be appeared in the available tree.

e. User can drag fields from available tree entities to selected tree entities to show metadata in root level.

f. After moving attributes from available to select then click save button to enable it.

Screen shot:

3. Gantt view Settings

a. Gantt view settings would help user to define what metadata fields should appear in gantt view.

b. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

c. Based on this selection, the fields are appeared in the available attributes.

d. User can drag fields from available tree entities to selected attributes to show metadata in root level.

e. After moving attributes from available to select then click save button to enable it.

Screen shot:

4. List view Settings

a. List view settings would help user to define what metadata fields should appear in gantt view.

b. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

c. Based on this selection, the fields are appeared in the available attributes.

d. User can drag fields from available attributes to selected attributes to show metadata in root level.

e. After moving attributes from available to select then click save button to enable it.

Screen shot:

5. Root level filter Settings

a. Root level filter settings would help user to define what metadata fields should appear in root level filter.

b. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

c. Based on this selection, the fields are appeared in the available attributes.

d. User can drag fields from available attributes to selected attributes to show metadata in root level.

e. After moving attributes from available to select then click save button to enable it.

f. Also admin user can define either keyword search is require or not in root level filter.

Screen shot:

6. Detailed filter Settings

a. Detailed filter settings would help user to define what metadata fields should appear in detailed filter.

b. Admin user can choose either dynamic entity (plans) or cost centres from the drop down.

c. Based on this selection, the fields are appeared in the available attributes.

d. User can drag fields from available attributes to selected attributes to show metadata in detailed level.

e. After moving attributes from available to select then click save button to enable it.

f. Also admin user can define either keyword search is require or not in root level filter.

Screen shot:

Dashboard (Marketing Intelligence) Settings

Dashboard settings categorized as widget types & template settings.

Dashboard charts / Data: The Dashboard Charts / Data section allows you to configure and manage the charts that will be available for users when viewing the dashboard. User must have predefined access for dashboard.

All graphs are interactive (can click areas of the charts or graphs for a list of values and then further for more detail).

Types of Dashboard Charts:

- Financial Summary by budget
- Task Summary
- Chart by country
- My Newsfeed
- Tasks by Status
- My Notifications
- User type summary
- User roles summary

Calendar: The Calendar Administration section allows you to add and edit public calendar views. These views will be able to be seen by all users who have access to the marketing calendar.

Editing Calendar Views:

- Group Campaigns by Campaign Owners, Participants or Custom Fields
- Select the fields you would like to appear
- Filter by dates, Campaign status, Campaign Owners or Participants, and Custom Fields

Tips on Calendar Views:

- Users can create and save their own personal views and mark favourites
- The marketing calendar can also be exported to Microsoft Excel by clicking the appropriate button on the toolbar
- Only the system administrator can change the colours of the Gantt chart bars.

Data Changes Report: This report highlights all information that has changed in all Campaigns. These settings allow the administrator to configure the fields that are displayed in the Data Changes Report Wizard.

1. Template settings

a. Default template needs to be created.

b. After default template created then roles will be assigned to this template.

Screen shot:

2. Widget type

a. After creating template, in widget type there will be an add button to configure system defined widgets which is newsfeed, milestone, task information, notifications etc…

b. Then user can define the role for each widget type by assigning the role.

Screen shot:

Task Settings

A task setting is to set task flag, task library and task template which will be associated with each entity to achieve task handler functionality.

Overview: Task flow administration used to create n number of task list and task templates. Both task list & task template tightly coupled based on the criteria which will be defined by administrator based on business needs.

Task List: Task list will help to create number of predefined tasks with attachments.

Task Template: Task template will define the criteria to set predefined task list to associate with each entity type.

Task Flag: Task flag will define different flags with different color code to identify the tasks status.

Export to excel: Each task list or entire tasks lists can be export as excel. From root level all the tasks list which is presented in its sublevel also can be exported as excel.

1. Task Flag

a. Admin can define list of flag with various status like, Important, immediate response and no response.

b. So these flag can be set for each task based on need / demand.

c. Name would be treated as caption, based on color code the flag will be set and the description can also be mentioned. User can edit / delete at any time.

d. User can enable / disable task flag by selecting / unselecting enable task flag.

Screen shot:

2. Task Library

a. Task list library to set predefined task list with prepopulated task and attachment.

b. Each task list library can be associated with each entity type.

Screen Shot add task list:

Screen shot for Add task in task list:

Screen shot of task list library:

3. Task list template

a. Task list template is to define filter criteria which will have single or multiple task lists.

b. Based on filter criteria, this task template will be added to the template when the time of entity creation.

c. Click add template button to create new template.

d. To set filter, click edit criteria of the created template.

e. After select the conditions in filter criteria, click save button to save the filter and it will be applicable when entity is created if the filter criteria get matched.

f. Click go back button, if does not want to set the filter.

g. By clicking "+" button to add more conditions. By clicking "-" button to remove.

Screen shot to add template:

Screen shot to define filter:

Settings

1. This settings help admin user to update search engine whenever new metadata configured by clicking update search engine. It will help system to recycle and start the search engine with new metadata.

Screen shot:

SSO

1. SSO settings would be used for achieve single sign on functionality through settings.

a. The necessary items are mandatory to define the SSO settings and same setup needs to be provided in the client side to achieve SSO.

b. Key needs to be provided which will be encrypted and generate a token with url.

c. IV needs to be provided which is initial vector for encryption.

d. Algorithm needs to be selected based on the demands.

e. Padding mode, cipher mode needs to be provided to generate encrypted token string.

f. SSO time difference can be defined to generate / receive request in minutes.

g. SSO token mode can be defined to generate either in text or XML.

h. Default group can be set. Public / viewer etc…

Administration - metadata Settings

Metadata: Metadata settings allow you to create attribute which is lists, fields, tree dropdown to capture in the entity information. Entity information is completed by the Initiator when they create the entity and can be edited at any time. The following types of Data fields and lists may be created and edited.

Fields:

Text Field: Short text field for limited text such as words and phrases.

Long Text Field: Larger text field with a scroll bar for sentences or paragraphs.

Date Field: Allows the user to manually input a date or select a date from the calendar pop up.

Number Field: Numeric input only.

Yes/No Field: A list containing the values „Yes" and „No".

Lists:

Single Select List: Users can only select one value in the list.

Multiple Select List: Users can select multiple values in the list.

Tree single selection List: user can select one dropdown value as a tree.

Tree multiple selections List: user can select multiple dropdown values as a tree.

Tips on Data Fields:

- The order of data fields may also be modified, by clicking on the row of the field to drag and drop.
- Areas to consider when adding a new data field at the campaign level.
    - Entity Wizard – entity added prior to adding new field will need to be updated if necessary.
    - Parent child relationships – relationships may need to be updated when adding field values to existing child data fields
    - Entity status can be defined and apply any while creating an entity type.
    - Entity wizard attribute groups (groups of different fields) can be added if necessary.

Entity Custom Status: In the Custom Status section you can add, edit or delete customized statuses for entities. You can also change the display order and the status.

Metadata Version Management: The metadata Version Management section allows you to capture a snapshot of a metadata setup at various stages of that system progress.

Business Rules Management: The Business Rules Management section allows rules to be set up to automatically changes the status of a Campaign if certain Campaign information is changed.

Departments: Every user can belong to a predefined department. These departments are created and managed through this section of the Administration page. Users are allocated to departments in the User & access section.

Single sign On Roles: User has a single sign on access then they can be able to access internal / external application which is associated with the system.

Task Templates: Administrator can define task template which will have a predefined tasks with attachments. It can be associated with any entity type based on the field"s criteria.

Plan Types: Add or Edit or build out plan Types and fields, and assign task flow Definitions.

1. Metadata settings will help admin user to create entity type, attribute type and associate both entity & attribute type. When user click metadata settings, there will be an button called “add version” will be available.

2. When user clicks Add new version, then the popup will open to create new version from system defined version where user can give name and description for the version by clicking save button.

Screen shot:

3. Once the metadata version is created, edit metadata version button will be enabled for created version and add new version button also visible.

4. User can create from any version to create a new version by clicking add new version.

5. User can edit current version and apply the changes in the current version itself instead of making new version.

6. And the latest version which is used in present will be highlighted.

Screen shot:

7. By clicking edit metadata of current version, user will get an alert message which state that after modifying data and come back to metadata version page, apply changes & activate button will be enabled to apply the changes in the system.

8. When user clicks “OK” then it will take user to Entity type & attribute page to create entity type & attribute type to associate each other.

a. Attribute

- i. By clicking add button, the new attribute can be created.
- ii. While creating any attribute, the option can be choose like the attribute is datetime, singe line text box, dropdown, check box etc…
- iii. If at all above these category then it can be just selected and saved.
- iv. But there are some special attributes like Listsinlgeline, listmultiselect, treedropdown will require another step to create.
- v. When special attributes are selected then next button will be appeared to configure it.
- vi. After clicks next then tree node will be appear to choose the options to define what are the options will come based on first drop down selection in the second drop down.
- vii. System defined attributes cannot be removed. If any attributes associated with entity type also cannot be removed. It should be removed from entity and then it should be removed from attributes.

Screen shot:

b. Entity type

- i. Entity type can be created by clicking add button.
- ii. While adding an entity type, caption should be provided which is an entity type name.

iii. Short description will help to make icon before the entity name in tree view, entity overview page.
iv. Color code can be provided to define color code for the entity. Same color code will be appeared with short description to show it tree view and in the entire application.
v. This color code will be shown in the gantt view bar when it has start / end date.
vi. Module can be selected to define which module this entity belongs to. At present only planning tool is available.
vii. Root level will let user define either the entity type is root level or sub level. If root level is clicked then the entity type will be treated as root level.
viii. Select children will help to define sub level under each level. Based on the selection the tree structure will be shown in entity tree view.
ix. Workflow can vary for each level. So each level different workflow can be selected. According to the selection the workflow would be present.

Screen shot:

x. After entered the entire fields click next button to configure the attributes for the entity type.
xi. Provide caption which needs to be available in entity type UI. Caption can be anything.
xii. And choose which attributes and associate with the caption name.
xiii. If the attributes should be inherited from parent then choose inherit from parent level.
xiv. If attribute should be read only not editable then choose read only.
xv. If attribute is inherit and editable then select choose from parent level. (read only should not be checked).
xvi. And clicks add button to update in right side panel to check what are the fields added.
xvii. This attributes can be editable.
xviii. Other than system defined entity type other types can be deleted.

Screen shot:

After created entity type & attributes click go back to apply change and activate the changes in the system.

c. Drag & Drop of Attributes

i. While creating an entity type, attributes can be sorted based on the user / client needs.
ii. After associating necessary attributes to the entity, when admin user mouse over the attributes filed then drag & drop icon would appear. By clicking each field user can drag & drop the position whichever it supposed to be.
iii. After drag & drop, click next and complete.
iv. When admin user completed, “Apply changes” button would be enabled in the main metadata setting page.
v. By clicking “apply changes” button this changes will be synched in to the system.

Screen shot:

Attribute group

The attribute group element is used to group a set of attribute declarations so that they can be incorporated as a group into entity type definitions.

Attribute group will be created same as attribute and linked with entity type by metadata settings.

Administration

Attribute group can be achieved through metadata settings in the system. Synchronization to DB should be performed after attribute group is created and linked with entity type.

Go to Administration -> Metadata settings

After clicking metadata settings, all the version would be visible and click “edit metadata” to achieve attribute group.

Attribute Group

Attribute group can be configured in the following way.

After clicking “edit metadata”, it will redirect to metadata settings page. Left side tree, click menu called “Attribute Group” to add / edit / delete attribute group as shown in below screen shot.

Admin user can define what are the attributes can be available in the attribute group which will be linked with any entity type. When the necessary attributes have been chose, by clicking save the new attribute group will be saved in to the system.

Adding a new attribute group

Click add to create a new attribute group. When add button is clicked then the popup will be opened. This popup is segregated with two different blocks.

First block is to provide an Attribute group name and description of the attribute group. Second block is to add available attribute is in the system already same as attributes. Attribute “Name” will be system defined attribute which cannot be removed.

There is two buttons called “clear” and “add” is available to clear the field selection in attribute and add attribute in to the attribute group respectively as shown in the below screen shot.

When the necessary attributes have been chose, by clicking save the new attribute group will be saved in to the system.

Linking with Entity Type

Metadata settings -> Entity Type

After creating an attribute group, those attribute group can be linked with any entity type. By editing any entity type, these attribute group can be configured.

Edit any entity type and attribute group is present in third page in the popup of entity type. Choose attribute group which needs to be associated with the entity and click Add.

In the same screen, there is a check box called “Append with detail block”. If this check box is clicked then this attribute group will be part of detail block in the entity overview page. If it‟s not checked then it will be a separate block.

Please see the screen shot below.

After adding the attribute group click next to complete the process.

When user clicks “Add report” button the configuration block will be appeared to start the configuration as shown in the screen shot below.

Sync to DB

After completing all above process, go back from metadata settings to do the sync settings by clicking “apply changes” button. This sync to db process will perform synchronization process and all the changes will be incorporated in to the system.

When apply changes clicked, and then user will get a successful message.

Entity

When entity is created, as per the admin configuration the attribute group will be presented in overview page.

If “Append with detail block” is not checked then the attribute group will be available after detail block as shown in below screen shot.

If “Append with detail block” is checked then the attribute group will be part of detail block as shown in below screen shot.

By clicking “click here to add „Attribute group name‟”, user can start to add attribute groups as shown in below screen shot.

The popup contains what are the attributes available in the particular attribute groups. If there is no image available then user has option to select image to upload. And also there is no restriction to crop the image based on any aspect ratio. User can be able to crop the image as per their needs after providing the details click add button to add to the entity type.

After adding the attribute group, it will be added to the entity type as shown in the below screen shot.

User can add multiple attribute group by clicking right corner “+” symbol in anywhere in the attribute group box. Also user can delete by clicking “X” from the entity.

Administration

Reports can be categorized in two ways in the Marcom platform as defined below.

1. System defined reports
2. Configuring reports through reporting server.

Overview: The Reports component allows you to access, run and build reports containing system data about Campaigns or other aspects of the system.

Standard Reports: Standard reports are available to associate with the system any time after customization by administrator as per the business needs.

List of Standard Reports*:

> **Financial Report:** Budget report of the all campaigns and activities. Financial report can be customized based on system needs though its system defined report.
>
> **Structure Report:** List of Campaigns / activities filtered by entity Status (can filter further by custom fields).
>
> **Gantt view Report:** List of all entities which can be generated as report based on the view like yearly, monthly and quarterly. Gantt view report can be filtered based on period / entity type and other custom fields.

All reports can be exported to Excel Printed.

Customized Reports: Reporting server (Engine) will help Admin to build a new report. The reports are available to associate with the system any time after customization by administrator as per the business needs.

All reports can be exported to Excel or Word or PDF and Printed.

System defined reports

System defined reports have been categorized in two ways. There are three reports are system defined as mentioned below.

1. Gantt view report (can be configured dynamically)
2. Financial report (can be configured dynamically)
3. Structure report (cannot be configured dynamically)

When the report feature is enabled in the system, these above three reports would be available in the report popup. Structure report will be default generation and there is no configuration necessary.

Gantt view Report

Gantt view and financial report can be configured in the following way.

Administration -> General settings -> Report settings -> Gantt view

Admin user can define what are the attributes can be available in the gantt view report. When the necessary attributes have been chose, by clicking save automatically the changes will be applied in the system.

Please see the screen shot below.

Financial Report

Administration -> General settings -> Report settings -> financial report

In this section by clicking add report button, n-number of financial report can created and configured based on the needs. Each financial report can have different metadata.

Please see the screen shot below.

When user clicks “Add report” button the configuration block will be appeared to start the configuration as shown in the screen shot below.

Configuring reports through reporting server

This section describes reports can be created and configured through reporting server. To achieve these configuration the following settings needs to be done in the Marcom platform.

Also reports can be created directly log in the reporting server application or it can be configured from Marcom platform.

If Admin is having reporting access then in the report popup they will have a edit button to login directly to the reporting server application from Marcom platform. So that admin user can create a new report or edit the existing report.

Credential Management

To login from Marcom platform the following credentials needs to be set in the administration -> General settings -> Reports settings -> Credential management

When user is providing the valid credentials then custom view can be created based on the needs.

Credential management contains the following fields which need to be filled with respective values.

Report server URL: URL of the report server which is http://report.brandsystems.com

Admin user name / password: admin user credential to edit the report.

Viewer username / password: credential for end user to view the report.

Category: Client name which is container of the report.

Data view: Data source to get the data.

For reference, screen shot attached below.

Custom view

Admin / partner can create a new data view which will be associated with the report. This view will be executed in the Marcom application to fetch all the data values to show it in the report.

Also Admin can be able to edit existing data view to add more metadata or remove.

Reports

All the created reports will be displayed here and admin user can upload the example image to see it in report popup for each report.

There is a column called show / hide will help admin user to enable or disable the reports in the system. When its selected then the status column will be changed as “Linked” which states that the reports are enabled in the system. If the status is “unlinked” this states that the reports are not enabled in the system.

Also admin user can define, either the particular report is available for only parent level or its applicable for sub level also.

Fields description:

1. Name: Name of the report.
2. Caption: Any caption based on the report.
3. Description: Description of the report.
4. Preview: Preview image to show it in report popup.
5. Show / hide: Enable / disable the report in the system.
6. Status: to see whether the report is linked or not linked with the system.
7. Entity level: Report availability for only parent level.
8. Sub levels: Report availability for sub levels as well.

Reporting Designer (Installation of Dev express server & Authentication)

1. Download report designer executable file which named as DevExpress.ReportServer.Designer.13.2.9
2. Install the report designer.
3. After installation, click report designer to login.
4. Provide the credentails to log in to the designer.

After login, it will to choose a report type which needs to be created as shown in the below screen shot.

New report creation

And also you can create a new report using the Report Wizard. To invoke the Report Wizard, click the New Report button in the Report tab of the ribbon toolbar as shown in the below screen shot.

Click the smart tag of the report, and in the invoked actions list, expand the Data Source drop-down list and click Add New DataSource as shown in the below screen shot.

On the first page of the invoked **Data Source Wizard**, select the data source to use in your report from the list of available items.

On the next page, select views from your database. If you choose multiple views, the Report Designer creates a data relationship between them (if possible).

On the next page, choose determines which columns will be available in your report.

On the same page move from left to right to select the columns.

After choosing the data source then user can start to configure the reports. User can start use the report designer option as shown below.

User can drag and drop the controls which need to be presented in the report. After dragged the control, Click the smart tag of the control to set the columns value from the available view as shown in the report as shown in the below screen shot.

After choosing the values from data source, then the user can see the report by clicking report preview to see the report.

After the report creation is completed, To upload a new report to the server, click the Upload Report... button in the Report section of the ribbon toolbar which will check in the report in the reporting server as shown in the below screen shot.

Editing existing report

To open an existing report, click the **Open Report...** button in the **Report** section of the ribbon toolbar.

Save Reports

After you have made changes to an existing report, you have two options:

- Save the report.
- Check in the report.

Saving creates a local copy of the report, allowing you to close the report and finalize the revision later. Additionally, it locks the report. This means that the report will not be editable by other users until the check in or rollback.

Checking in uploads a new revision to the server and unlocks the report, if it was previously locked.

To save the report, click Save Report in the ribbon toolbar as shown in the below screen shot.

To check in the revision, click Check in the Report in the ribbon toolbar as shown in the below screen shot.

To undo all changes made for the current revision, click the drop-down arrow in the Check In Report... button and select Undo Check Out in the invoked menu as shown in the below screen shot.

After check in the report, it will automatically push in to the Marcom application. Then Admin user need to go to Administration settings to enable the reports in the system in Administration -> General settings -> Reports Settings -> Reports.

Report popup

In the report popup, have all possible permissions to create, manage, view, and distribute reports those who are having administration access as show in the below screen shot.

When user clicks edit, they can start editing the reports which already exists in the reporting server.

Appendix A – user access permission table

Administrator Feature	
Metadata configuration	can create and update metadata for the system
User creation	Can create and update new users
Global role creation and config setting	Can create roles and configure features to it.
Planning tool settings	Can configure Gantt view, list view settings
Financial settings	Can configure currency, PO number
Dashboard settings	Can create default dashboard template with wizards
Objective settings	Can create units
Task settings	can create predefined tasks and task templates
Report settings	can configure different types of reports
Planning tool feature	
Create entity	can create new entity
Duplicate entity	can duplicate entities with various options
Create filters and apply	can create, save and apply filters
Gantt view	Can view and modify Period
List view	can view 'List view'
Edit entity metadata	can change entity metadata details
entity Newsfeeds	Can see all news feeds related to the entity
Financial Feature	
Plan budget	Can Plan budget for the entity
Request for approval	Can request for approval
Approve budget	Cost centre owner can approve
Create Purchase order	can create, edit for PO
Adjust approved allocation	Can adjust approve allocation
Create Invoice	can create, edit for Invoice
Financial forecast	can modify financial forecasting
Costcentre Feature	
Costcentre creation	Can create cost centre with Fiscal year
Gantt, list view	Can view gantt and list for Costcentres
Change assigned amount	Can change assigned amount
Report Feature	
config custom view	Can config custom report
Generate report	Can generate various types of reports

Appendix A – Email Summary

Email Summary:

All the email options can be defined by administrator in admin settings and also user can restrict in their own page settings.

- **Entity New** – E-mail triggered when a new entity is created and members are added.
- **Task assigned** – Email triggered when a task is assigned.
- **Task Overdue** – E-mail triggered when a task is overdue.
- **Entity Reactivated** –e-mail triggered when entity status is changed from “On Hold” to an active status
- **Entity Owner Reassigned** – E-mail triggered when entity owner is reassigned.
- **File Uploaded** – E-mail triggered when files are uploaded to their entity.

Block Email Template Summary:

All the email options can be defined by administrator in admin settings and also user can restrict in their own page settings.

- **Entity New** – Block E-mail triggered when a new entity is created and members are added.
- **Task assigned** – Block Email triggered when a task is assigned.
- **Task Overdue** – Block E-mail triggered when a task is overdue.
- **Entity Reactivated** – Block e-mail triggered when entity status is changed from “On Hold” to an active status
- **Entity Owner Reassigned** – Block E-mail triggered when entity owner is reassigned.
- **File Uploaded** – Block E-mail triggered when files are uploaded to their entity.

Active / Block Notification Summary:

All the notifications options can be defined by administrator in admin settings and also user can restrict in their own page settings.

- **Entity New** – Active / block notification triggered when a new entity is created and members are added.
- **Task assigned** – Active / block notification triggered when a task is assigned.
- **Task Overdue** – Active / block notification triggered when a task is overdue.
- **Entity Reactivated** – Active / block notification triggered when entity status is changed from “On Hold” to an active status
- **Entity Owner Reassigned** – Active / block notification triggered when entity owner is reassigned.
- **File Uploaded** – Active / block notification triggered when files are uploaded to their entity.
- **Metadata update** - Active / block notification triggered when metadata edit / delete happen to their entity.

SEE ATTACHMENT BELOW:

- Tags
- MRM

Attachments

- BrandSystems MRM User Guide.pdf (3.48 MB)