Chapter 1
Welcome to UN

Welcome to UN, Harmonic Communications Corporation's house-produced Web-based application for automating the administrative aspects of the advertising-industry workflow. UN simplifies the completion of tasks throughout the advertising cycle while promoting the efficient management of advertising assets across multiple media that is a key part of the Harmonic value proposition.

UN—the name is short for United Nations, a salute to Harmonic's original name of Yalta, site of the 1945 conference where the idea of the UN took shape—is used by Harmonic staff in the following groups: Account Planning, Channel Management, Creative, Customer Analytics, and Engagement Management.

ABOUT UN SYSTEM BENEFITS

The system benefits those groups in a variety of ways, including:

- Making it possible to upload advertising assets—such as campaign planning worksheets in Microsoft Excel, media briefs in Microsoft Word, or image files built with Adobe Photoshop—into a central repository and to associate these assets with engagements, programs, campaigns, and projects
- Allowing employees to view, edit, and copy those files, based on their user roles and permissions
- Preventing simultaneous modification of files through a system of checking assets in and out
- Allowing for history tracking and roll backs through versioning
- Providing for the efficient management of communications and business relationships with clients and vendors
- Facilitating the internal review and approval of advertising assets
- Enabling the assignment of tasks
- Enabling the generation of standard advertising industry reports (such as a list of insertion orders by client) from data stored in the system
- Allowing campaign execution orders to be sent directly to the computers of vendor companies
- [Revisions and additions to this list TK]

ABOUT THIS USER GUIDE

[This section will set forth the structure and conventions of this manual.]

Chapter 2

UN and the Advertising Workflow

[This chapter will summarize the advertising workflow and indicate what role UN will play at each stage. Special attention will be paid to the efficiency and other gains derived from using UN.]

Chapter 3
Getting Started

This chapter explains the requirements for running UN and how to access, log on, and log off from UN. It also shows you what UN looks and feels like, identifies the parts of the UN interface, and shows you some of the basics of navigating in the system. Finally, it introduces some UN concepts that will be important to you as you move toward actively working with the system.

SYSTEM REQUIREMENTS

To run UN, your computer must meet the following requirements:

COMPONENT	REQUIREMENTS
Operating System	Windows 98 or Windows 2000
Screen Resolution	800 x 600 pixels or higher
Connectivity Components	56 kbps or faster
Browser	Internet Explorer 5.5
Additional	Microsoft.xml executable. This file, available on the Harmonic Intranet, is necessary for giving IE XML capability and should be applied after you upgrade to IE 5.5.

Table 1: UN System Requirements

APPLICATIONS REQUIREMENTS

Your computer must also be equipped with the applications software of any document or other asset you want to open for edit or review. The software needed varies from user to user depending on their role; for instance, members of the Customer Analytics group might never need Adobe Photoshop. Examples of commonly used programs at Harmonic include:

- Adobe Photoshop
- Allaire HomeSite
- Macromedia Director
- Macromedia Dreamweaver
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Word

NOTE

UN imposes no limits on the kinds of applications that can be used in the system. Assets created with any application can be used in UN.

ACCESSING UN

UN resides on Harmonic's corporate intranet and is accessed like an ordinary Web page.

To access UN: Open your Web browser and direct it to [http://europa.yaltacomm.com:30313/]

IMPORTANT

The UN Web address is: [http://europa.yaltacomm.com:30313/]

To log on to UN:

1. Obtain your UN user name and password from your manager, if necessary.
2. Type your UN user name and password into the appropriate fields.

   TIP

   Check the **Remember me** box if you want your user name to appear automatically in the username field whenever you open UN.

3. Click **Login**.

   UN opens to the main page of the Slates area, the product's "home page."

EXITING UN

To log off from UN:

1. If you are working in a **New** or **Edit** window and want to save your work, click **Save**.
2. On the **Navigation bar**, click **Logout**.

NAVIGATING IN THE UN SYSTEM

[This section will introduce the user to the principal components of the UN interface, using a combination of text and screenshots. It will also outline the basics of navigating among the various areas and tabs.]

PERFORMING COMMON OPERATIONS

[This section will explain how to perform such basic operations as saving your work, cancelling operations, and refreshing the display; sorting lists by clicking on column heads; using the Slates filter; using the Search and Slates tabs in the Clients & Users area; and hiding and showing Properties boxes.]

[suggest they set up a file with a friendly name for storing docs they check out of UN for edit: c:\\Harmonic\UN]

Saving Your Work

Cancelling Operations

Refreshing the Display

Directories

clicking x to close boxes.

Applying Filters

In UN, a filter is a dialog containing a tree directory of client companies and their associated units (organizational units, programs, campaigns, projects, and documents). Filters let you sort information and display in a table only the information you are interested in. Table entries are hyperlinked, allowing quick access to their Properties and edit windows. Three of UN's areas require you to use a filter to bring up information: Slates, Documents, and Tasks.

To apply a filter:

1. Click **Apply filter...**

   A dialog with the tree directory opens.
2. Navigate to the level where you want to apply the filter, clicking on the plus signs as necessary to expand the directory.
3. Click on the level where you want to apply the filter.

   All relevant items at and below the level you chose are displayed in the table of the area you are working in.

Items returned by the filter are hyperlinked. The links typically lead to Properties boxes and other information, and provide access to the relevant edit windows.

Hyperlinked e-mail addresses create blank e-mails addressed to the person named in the link (you may need to maximize the e-mail from the Windows task bar).

Using the Search Tabs

[changed in latest version, review and correct; possible it will change more bc of bug filed on searching for Harmonic employees; if you don't know one of the teams they're on, you can't find them.]

Two of UN's areas, the Clients & Users and Vendors areas, feature a tab called the Search tab that lets you search through the database of companies, people, and slates associated with these areas and display in a table those you are interested in. For instance, you can use the Clients & Users search tab to call up all of the engagements, campaigns, and so forth connected with a certain client company, or the Vendors search tab to bring up a list of vendor contacts associated with a particular vendor.

Items returned by the tabs are hyperlinked, with the links typically providing access to each item's **Properties** box and edit window.

Hyperlinked e-mail addresses create blank e-mails addressed to the person named in the link (you may need to maximize the e-mail from the Windows task bar).

To use the Clients & Users Search tab:

1. On the Navigation bar, click on the **Clients & Users** tab.

   The **Clients & Users** search tab is displayed.
2. Complete the fields on the tab according to what you are searching for. The fields can be used in any combination and none is required. Use of the fields is explained below:

   First name: The first name of a client contact or Harmonic employee you are looking for.

   Last name: The last name of a client contact or Harmonic employee you are looking for.

   Client: Choose an entry from the drop-down list, which includes all the client companies and organizational units in the system. You can also leave this field as its default, **<Select Company>**, which will cause the search area to include all of the client companies in UN.

3. Choose either the **Find Contacts** or **Find Team Members** radio button.
4. Click **Search.**

   The system returns the results in a table.

To use the Vendors Search tab:

1. On the Navigation bar, click on the **Vendors** tab.

   The **Vendors** search tab is displayed.
2. Complete the fields on the tab according to what you are searching for. The fields can be used in any combination and none is required. Use of the fields is explained below:

   First name: The first name of a vendor contact you are looking for.

   Last name: The last name of a vendor contact you are looking for.

   Vendor name: The name of a vendor firm.
3. Click **Search.**

   The system returns the results in a table.

Sending Feedback

To send feedback on UN: Click on the link **Send us feedback** at the bottom of any page in the product. A blank e-mail addressed to product management is created (you may need to maximize the e-mail from the Windows task bar).

Chapter 4
Working with Basic Information

[intro to this section]

[The information in this chapter is used only by managers]

WORKING WITH USER INFORMATION

In the UN system, Harmonic employees are known as users. Users must be entered into the system before they can log on and use UN, and their being in the system makes it possible for them to be assigned to teams, assign and be assigned tasks, and to participate in almost everything else UN does.

This chapter discusses the following aspects of working with data on Harmonic employees:[fix]

- Adding a user to the system
- Editing a user's information (for instance, changing his or her job title)

All of the activities described in this chapter take place in UN's Clients & Users area. You can access this area from any location in the system by clicking the Clients & Users tab on the Navigation bar.

For more information on getting around in UN, see the section "Navigating in the UN System," in Chapter 3.

For more information on the various areas of UN, see the section "__________," also in Chapter 3.

Adding Users to the System

To add a Harmonic employee to the system:

1. On the **Navigation bar**, click the **Clients & Users** tab.

   The first page of the **Clients & Users** area is displayed.
2. On the **Operations bar**, click **Create new>> User.**

   The **New User** window is displayed.
3. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Sync w/ Outlook: Checking this box causes UN to synchronize with your Outlook client; your UN tasks will then appear in Outlook. There is no communication in the other direction, from Outlook to UN. (For more information on Tasks, see Chapter ___.)

   Suffix: Refers to such surname suffixes as Jr. or Sr.

   Phone (primary) +: Clicking the plus sign creates fields for additional phone numbers.

   Job Title: Choose an option from the drop-down menu.

   Business Group: Choose an option from the drop-down menu.

4. Click **Save.**

   A properties box titled "Harmonic" and showing the person's user information is displayed.

Editing User Information

This section describes how to edit information on employees already in the system.

To edit the information of a Harmonic employee already in the system:

1. On the **Navigation bar**, click the **Clients & Users** tab.
   The first page of the **Clients & Users** area is displayed.
2. Use the **Search** tab to generate the employee's name in the **Clients & Users** table.
   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. In the **Clients & Users** table, in the **Last Name** column, click the person's last name.
   The box showing the employee's properties is displayed.
4. On the Operations bar, click **Edit**.
   The **Edit User** window is displayed.
5. Make the desired changes.

   NOTE
   The username field cannot be edited.

6. Click **Save**.
   The employee's **Properties** window is displayed, reflecting any changes made.

WORKING WITH CLIENT INFORMATION

Typically, a manager will enter a client company or organizational unit into the system when Harmonic comes to an agreement with a company to perform services on its behalf. A good example of a client company is Hewlett-Packard and of an organizational unit is HP Printers. It is always necessary to set up a data profile on the client company before doing so for one of its organizational units, even if our business relationship is chiefly with the organizational unit.

NOTE
In most cases the manager, after setting up a data profile on a client company or organizational unit, will go on immediately to set up an engagement with that company or organizational unit. The engagement outlines our business relationship with the client. For more information on engagements, see Chapter _, "_______________."

This chapter discusses the following subjects pertaining to working with client companies and their organizational units:

- Entering client company information into UN
- Editing that information
- Entering information on a client company's organizational units
- Editing that information

For information on viewing (rather than entering or editing) company and organizational unit information, see Chapter ____, "Viewing Basic Information."

Working with Client Companies

This section describes how to set up data profiles on client companies (input basic information on them into the system) and how to edit those profiles.

Adding a client company to the system is a prerequisite for adding information on one of the company's organizational units.

Setting up a Data Profile on a New Client Company

To set up a data profile on a Client Company:

1. On the **Navigation bar**, click the **Clients & Users** tab.

The first page of the **Clients & Users** area is displayed.

2. On the **Operations bar**, click **Create new>> Client.**

   A dialog for adding new companies and organizational units is displayed.

NOTE

You can ignore the expandable directory at the center of the dialog. This directory is not used when a company is first entered into the system.

3. Click the **New Company** button at the top of the dialog.

   The **New Company** window is displayed.

4. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Description: This is an open-ended field for general information on the company's line of business, size, plans for growth, and so on.

   State: Select the correct state abbreviation from the drop-down menu.

5. Click **Save.**

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with the data of the newly entered company.

   For more information on the **Slates** area, see Chapter _____.

To correct or edit the information you just entered:

1. With the company's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit Company** window is displayed for the newly entered company.

2. Make your changes and click **Save.**

WARNING

If you move on from the Slates window showing the Properties box of the newly entered company, you will not be able to access its properties for editing until you create an engagement for it.

Editing a Client Company's Data Profile

There is a prerequisite to editing a client company's data profile: an engagement must already have been created for that company. (The one exception is that immediately after you create the new company's profile, and while you are still displaying the window with the company's Properties box, you can edit its information by clicking Edit on the Operations bar.) For information on creating an engagement, see Chapter 6, "Creating Engagements and Teams."

The instructions below assume an engagement has already been created for the client company.

To edit a client company's data profile:

1. On the **Navigation bar**, click the **Slates** tab.

   The first page of the **Slates** area is displayed.

2. Use the **Search** tab to generate the company's name in the **Slate**'s table.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.

3. Click on the company's name.

   A window showing information on the engagement is displayed.

4. Locate the green engagement **Properties** box on the right side of the screen.

5. In the **Properties** box, click on the company's name.

   A window showing information on the company, including its Properties box, is displayed.

6. On the Operations bar, click **Edit.**

The **Edit Company** window is displayed.

7. Make your changes and click **Save**.

   The client company's Properties box is displayed again, now incorporating your changes.

Working with Organizational Units

This section describes how to set up data profiles on organizational units of client companies, how to set up profiles for organizational units that branch off of higher-level organizational units (for instance, attaching to the organizational unit HP Printers a subordinate unit called HP Color Printers), and how to edit an organizational unit's data profile once it's already in the system.

NOTE
A prerequisite for entering data on an organizational unit is that the company itself must have already been entered into UN. This chapter assumes this has been done.

Setting up a Data Profile on an Organizational Unit

To set up a data profile for an organizational unit:

1. On the **Navigation bar**, click the **Clients & Users** tab.

   The first page of the **Clients & Users** area is displayed.
2. On the **Operations bar**, click **Create new>> Client**.

   A dialog for adding new companies and organizational units is displayed.
3. In the directory, locate the company to which you want to attach the new organizational unit.
4. Click on the company's name.

   The **New OrgUnit** window is displayed.
5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Description: This is an open-ended field for general information on the organizational unit's line of business, size, plans for growth, and so on.

   State: Select the correct state abbreviation from the drop-down menu
6. Click **Save**.

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with the data of the newly entered organizational unit.

   For more information on the **Slates** area, see Chapter ______.

To correct or edit the information you just entered:

1. With the organizational unit's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit OrgUnit** window is displayed for the newly entered unit.
2. Make your changes and click **Save**.

WARNING
If you move on from the Slates window showing the Properties box of the newly entered organizational unit, you will not be able to access its properties for editing until you create an engagement for it.

NOTE
There is no limit to the number of organizational units that can be attached to a given client company.

Setting Up a Data Profile on a Dependent Organizational Unit

The section describes how to set up a data profile for dependent organizational unit, that is, an organizational unit that branches off of a higher-level organizational unit. This would be done in an instance similar to the following: Having already set up a profile for Hewlett-Packard, and also one for a higher-level organizational unit of the company, say, HP Printers, you then needed to set up a profile for a unit subordinate to HP Printers, say, HP Color Printers.

To set up a data profile for a dependent organizational unit:

1. On the **Navigation bar**, click the **Clients & Users** tab.

   The first page of the **Clients & Users** area is displayed.
2. On the **Operations bar**, click **Create new>> Client.**

   A dialog for adding new companies and organizational units is displayed.
3. In the directory, locate the parent company of the organizational unit you are adding.
4. Click on the plus sign to the left of the company's name.

   The directory expands to reveal any first-level organizational units attached to that company.
5. Continue drilling in this fashion until you reach the organizational unit to which you want to attach a dependent organizational unit.
6. Click on the name of the organizational unit.

   The **New OrgUnit** window is displayed.
7. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Description: This is an open-ended field for general information on the organizational unit's line of business, size, plans for growth, and so on.

   State: Select the state abbreviation from the drop-down menu
8. Click **Save.**

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with the data of the newly entered organizational unit.

For more information on the **Slates** area, see Chapter ______.

To correct or edit the information you just entered:

1. With the organizational unit's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit OrgUnit** window is displayed for the newly entered unit.
2. Make your changes and click **Save.**

WARNING

If you move on from the Slates window showing the Properties box of the newly entered organizational unit, you will not be able to access its properties for editing until you create an engagement for it.

Editing an Organizational Unit's Data Profile

There is a prerequisite to editing an organizational unit's data profile: an engagement must already have been created for it. (The one exception is that immediately after you create the new organizational unit's profile, and while you are still displaying the window with the organizational unit's Properties box, you can edit its information by clicking Edit on the Operations bar.) For information on creating an engagement, see Chapter 6, "Creating Engagements and Teams."

The instructions below assume an engagement has already been created for the organizational unit.

To edit an organizational unit's data profile:

1. On the **Navigation bar**, click the **Slates** tab.

   The first page of the **Slates** area is displayed.
2. Use the **Search** tab to generate the organizational unit's name in the **Slate**'s table.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. Click on the name of the organizational unit.

   A window showing information on the engagement that is associated with the organizational unit is displayed.
4. Locate the green engagement **Properties** box on the right side of the screen.
5. In the **Properties** box, click on the organizational unit's name.

   A window showing information on the organizational unit, including its Properties box, is displayed.
6. On the Operations bar, click **Edit**.

   The **Edit OrgUnit** window is displayed.
7. Make your changes and click **Save**.

   The organizational unit's Properties box is displayed again, now incorporating your changes.

Working with Client Contacts

[Introduction will define what a client contact is and explain, among other things, prerequisites for creating them and who will perform these operations.]

Adding Client Contacts

To add a Client Contact to the system:

1. On the **Navigation bar**, click the **Clients & Users** tab.

   The first page of the **Clients & Users** area is displayed.
2. On the **Operations bar**, click **Create new>> Client Contact.**

   A dialog for associating new client contacts with campaigns and projects appears.

   NOTE

   Client contacts can only be associated with campaigns and projects [confirm].

3. In the dialog's directory, and clicking on the plus signs to expand the directory as necessary, locate the name of the campaign or project to which you want to associate the new client contact.
4. Click on the campaign or project.

   The **New Client Contact** window is displayed (the window's title also indicates the name of the associated campaign or project).
5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Suffix: Refers to such surname suffixes as Jr. or Sr.

   Phone (primary) +: Clicking the plus sign creates fields for additional phone numbers.
6. Click **Save.**

   A Properties box labeled with the name of the person's company and showing the information of the new client contact is displayed.

To correct or edit the information you just entered:

1. With the client contact's **Properties** box displayed, click **Edit** on the Operations bar.

The **Edit Client Contact** window is displayed for the newly entered contact.

2. Make your changes and click **Save**.

   The person's Properties box is displayed again, now showing the revised information.

Editing Information on Client Contacts

To edit the information on a client contact:

1. On the **Navigation bar**, click the **Clients & Users** tab.

   The first page of the **Clients & Users** area is displayed.

2. Use the **Search** tab to generate the client contact's name in the **Clients & Users** table.

   NOTE
   For information on using the Clients & Users Search tab, see ___________.

3. In the **Clients & Users** table, in the **Last Name** column, click the person's last name.

   The box showing the Client Contact's properties is displayed.

4. With the person's **Properties** box displayed, click **Edit** on the **Operations bar.**

   The **Edit Client Contact** window is displayed.

5. Make your changes and click **Save**.

   The person's Properties window is displayed, now showing the revised information.

WORKING WITH VENDOR INFORMATION

[Introduction TK]

Working with Vendor Companies

Adding Vendor Companies

To add a Vendor company to the system:

1. On the **Navigation bar**, click the **Vendors** tab.

   The first page of the **Vendors** area is displayed.

2. On the **Operations bar**, click **Create new>> Vendor**.

   The **New Vendor** window is displayed.

3. Complete the fields in the window. Fields with an asterisk are required. Click **Save**.

   A Properties box labeled with the name of the vendor company and showing its information is displayed.

To correct or edit the information you just entered:

1. With the vendor's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit Vendor** window is displayed for the newly entered vendor.

2. Make your changes and click **Save**.

   The vendor company's Properties box is displayed again, now showing the revised information.

Editing Information on Vendor Companies

To edit information on a vendor company:

1. On the **Navigation bar**, click the **Vendors** tab.

The first page of the **Vendors** area is displayed.

2. Use the **Search** tab to generate the company's name in the Vendors table.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.

3. Click on the company's name.

   The Vendor's properties box is displayed.

4. On the Operations bar, click **Edit.**

   The **Edit Vendor** window is displayed.

5. Make your changes and click **Save.**

   The vendor's Properties box is displayed again, now incorporating your changes.

Working with Vendor Contacts

[Introduction TK]

Adding Vendor Contacts

To add a Vendor Contact to the system:

1. On the **Navigation bar,** click the **Vendors** tab.

   The first page of the **Vendors** area is displayed.

2. On the **Operations bar,** click **Create new>> Vendor Contact.**

   A dialog for associating new vendor contacts with vendor companies appears.

3. In the dialog, click on the name of the vendor company to which you want to associate the new vendor contact (that is, the company the person works for) then click **Next.** (Alternately, double-click on the name of the company.)

   The **New Vendor Contact** window is displayed.

4. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Suffix: Refers to such surname suffixes as Jr. or Sr.

   Phone (primary) +: Clicking the plus sign creates fields for additional phone numbers.

   Contact type: Choose an option from the drop-down menu.

   Country: Choose an option from the drop-down menu.

5. Click **Save.**

   A Properties box showing the information of the new vendor contact is displayed.

To correct or edit the information you just entered:

1. With the vendor contact's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit Vendor Contact** window is displayed for the newly entered contact.

2. Make your changes and click **Save.**

   The person's Properties box is displayed again, now showing the revised information.

Editing a Vendor Contact's Information

To edit information on a vendor contact:

1. On the **Navigation bar,** click the **Vendors** tab.

   The first page of the **Vendors** area is displayed.

2. Use the **Search** tab to generate the person's name in the Vendor's table.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.

3. Click on the person's name.

A window showing the vendor contact's properties is displayed.

4. On the Operations bar, click **Edit**.

   The **Edit Vendor Contact** window is displayed.

5. Make your changes and click **Save**.

   The vendor contact's Properties box is displayed again, now showing the new information.

Chapter 5
Viewing Basic Information

[This section will collect in one places instructions on viewing the main types of Properties information, for the benefit of those employees whose only responsibility vis a vis this data is looking at it.]

VIEWING USER INFORMATION

To view a Harmonic employee's Properties window:

1. On the **Navigation bar**, click the **Clients & Users** tab.
   The first page of the **Clients & Users** area is displayed.
2. Use the **Search** tab to generate the employee's name in the **Clients & Users** table.
   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. In the **Clients & Users** table, in the **Last Name** column, click the person's last name.
   The box showing the employee's properties is displayed.

VIEWING CLIENT COMPANY INFORMATION

To view the properties of a client company:

1. On the **Navigation bar**, click the **Slates** tab.
   The first page of the **Slates** area is displayed.
2. Use the **Search** tab to generate the company's name in the **Slate**'s table.

NOTE
For information on using the Clients & Users Search tab, see __________.

3. Click on the company's name.
   A window showing information on the engagement is displayed.
4. Locate the green engagement **Properties** box on the right side of the screen.
5. In the **Properties** box, click on the company's name.
   A window showing information on the company, including its Properties box, is displayed.

VIEWING CLIENT CONTACT INFORMATION

To view the properties of a client contact:

1. On the **Navigation bar**, click the **Clients & Users** tab.
   The first page of the **Clients & Users** area is displayed.
2. Use the **Search** tab to generate the client contact's name in the **Clients & Users** table.

NOTE
For information on using the Clients & Users Search tab, see __________.

3. In the **Clients & Users** table, in the **Last Name** column, click the person's last name.
   The box showing the Client Contact's properties is displayed.

VIEWING VENDOR COMPANY INFORMATION

To view the properties of a vendor company:

1. On the **Navigation bar**, click the **Vendors** tab.
   The first page of the **Vendors** area is displayed.
2. Use the **Search** tab to generate the company's name in the Vendors table.
   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. Click on the company's name.
   The Vendor's properties box is displayed.

VIEWING VENDOR CONTACT INFORMATION

To view a Vendor Contact's properties:

1. On the **Navigation bar**, click the **Vendors** tab.
   The first page of the **Vendors** area is displayed.
2. Use the **Search** tab to generate the person's name in the Vendor's table.
   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. Click on the person's name.
   A window showing the vendor contact's properties is displayed.

Chapter 6
Working with Engagements

[This section will explain what an engagement is, describe what role they play in the UN workflow, and give step instructions for creating and editing them. It will also indicate who in the company has the responsibility--and capability--of creating and editing engagements. Finally, it will tell those who need merely to view the properties of an engagement where in the guide to turn for that information.]

CREATING ENGAGEMENTS

[The introduction to this section will note that engagements can be created at either the company or the organizational unit level.]

To create an engagement:

1. On the **Navigation bar**, click the **Slates** tab.

   The first page of the **Slates** area is displayed.
2. On the **Operations bar**, click **Create new>> Engagement.**

   A dialog for attaching engagements to companies and their organizational units is displayed.
3. In the directory, and using the plus signs if necessary, locate the company or organizational unit to which you want to attach the new engagement.
4. Click on the company name or organizational unit.

   A **New Engagement** window for adding information about the engagement is displayed.

   NOTE

   There is a limit of one engagement per company level. If you click on a company or organizational unit for which an engagement already exists, the system will not respond.

5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Comment: An open-ended field for general comments on the engagement. [Examples]

   Objective: For example, "Drive consumers to client's Web site, lower customer acquisition costs for client."

   Start date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.

   End date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.
6. Click **Save.**

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the newly created engagement.

   For more information on the **Slates** area, see Chapter ______.

To correct or edit the information you just entered:

1. With the engagement's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit Engagement** window is displayed for the newly entered engagement.

2. Make your changes and click **Save**.

   The engagement's **Properties** box is displayed again, now incorporating your changes.

EDITING AN ENGAGEMENT'S DATA PROFILE

To edit an engagement's data profile:

1. On the **Navigation bar**, click the **Slates** tab.

   The first page of the **Slates** area is displayed.

2. Use the **Search** tab to generate in the **Slates** table the name of the company or organizational unit associated with the engagement.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.

3. Click on the name of the company or organizational unit associated with the engagement.

   A window showing information about the engagement is displayed.

4. On the Operations bar, click **Edit**.

   The **Edit Engagement** window is displayed.

5. Make your changes and click **Save**.

   The organizational unit's Properties box is displayed again, now incorporating your changes.

Chapter 7
Working with Teams

[This section will explain the role of teams in the UN product and situate the creation of teams after the creation of engagements in the UN workflow. It will also describe how to assign and unassign people from teams, explain what is meant by assigning team members roles, and discuss the disadvantages of creating a team for a lower-level slate before one is created for the parent engagement. It will give instructions on creating teams for engagements, as well as for programs, projects, and campaigns.]

WORKING WITH ENGAGEMENT TEAMS

Creating a Team for an Engagement

To create a team for an engagement:

1. On the **Navigation bar**, click the **Slates** tab.

   The front page of the **Slates** area is displayed.
2. Use the **Search** tab to generate in the **Slates** table the name of the company or organizational unit associated with the engagement.

   For information on using the **Search** tab, see the section "____________," in Chapter 3.
3. Click on the name of the company or organizational unit associated with the engagement.

   A window showing information about the engagement is displayed.
4. On the Operations bar, click **Edit**.

   The **Edit Engagement** window is displayed.
5. In the section of the window labeled "Harmonic team," click **Select**.

   The **Edit team members** dialog, for assigning Harmonic employees to the engagement's team, is displayed.
6. In the **Unassigned** column, click on the name of a person you want to assign to the engagement team, then click the right-arrow button. (Alternately, double-click on the person's name.)

   The person's name is transferred from the **Unassigned** column to the **Assigned** column.
7. Repeat Step 6 until you've placed on the team everyone you want.
8. To remove someone from the team, click on their name then click on the left-arrow button.

   NOTE

   The shortcut of double-clicking to move people from one column to the other does not work in going from the Assigned column to the Unassigned column. Instead it activates an unrelated function (a dialog for assigning roles to team members).
9. In the **Assigned** column, click on the name of one of the team members then click **Select role(s)**. (Alternately, double-click on the team member's name.)

   A dialog for assigning roles to the chosen team member is displayed.

   NOTE

   For information on team members roles, see __________________.
10. Check the box(es) for the role(s) this person will perform in the engagement.

11. Click **Done**.

    The **Edit team members** dialog is displayed again.

12. Repeat steps 9 and 10 for all members of the engagement team.

13. When you are finished assigning roles to team members, and with the **Edit team members** dialog showing, click **Done**.

    The **Edit team members** dialog closes.

    The employee(s) you selected for the engagement team are listed in the "Harmonic team" section of the **Edit Engagement** window.

14. In the **Edit Engagement** window, click **Save** to save your work.

    A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the engagement. The "HARMONIC TEAM" section of the **Properties** box now lists the engagement's team members.

Editing the Composition of an Engagement Team

[Introduction to this section explains that editing the composition of a team includes one or all of the following: adding people to a team, removing people from a team, and changing team members' roles.]

[The intro will note that it is possible to perform all three of these activities at once when the Edit team members dialog is open, but that the instructions break them into separate procedures for the sake of clarity.]

Adding a Person to an Engagement Team

To add an employee to an existing engagement team:

1. On the **Navigation bar**, click the **Slates** tab.

   The front page of the **Slates** area is displayed.

2. Use the **Search** tab to generate in the **Slates** table the name of the company or organizational unit associated with the engagement.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.

3. Click on the name of the company or organizational unit associated with the engagement.

   A window showing information about the engagement is displayed.

4. On the Operations bar, click **Edit**.

   The **Edit Engagement** window is displayed, showing the current members of the engagement team (in the section of the window called "Harmonic team").

5. In the "Harmonic team" section of the window, click **Select**.

   The **Edit team members** dialog is displayed.

   The **Unassigned** column shows employees available to be added to the team.

   The **Assigned** column shows those currently on the team.

6. In the **Unassigned** column, click on the name of anyone you want to add to the engagement team, then click the right-arrow button. (Alternately, double-click on the person's name.)

   The person's name is transferred from the **Unassigned** column to the **Assigned** column.

7. In the **Assigned** column, click on the name of the new team member then click **Select role(s)**. (Alternately, double-click on the team member's name.)

   A dialog for assigning roles to the team member is displayed.

NOTE

For information on team members roles, see ________________.

8. Check the box(es) for the role(s) this person will perform in the engagement.
9. Click **Done**.

   The **Edit team members** dialog is displayed again.
10. Repeat steps 6 through 9 for all employees you want to add to the engagement team.
11. When you are finished adding team members and assigning roles to them, and with the **Edit team members** dialog showing, click **Done**.

    The **Edit team members** dialog closes.

    The employee(s) you added to the engagement team is (are) now included in the list in the "Harmonic team" section of the **Edit Engagement** window.
12. In the **Edit Engagement** window, click **Save** to save your work.

    A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the engagement. The "HARMONIC TEAM" section of the **Properties** box includes the team member(s) you added.

Removing a Person from a Engagement Team

To remove an employee from an engagement team:

1. On the **Navigation bar**, click the **Slates** tab.

   The front page of the **Slates** area is displayed.
2. Use the **Search** tab to generate in the **Slates** table the name of the company or organizational unit associated with the engagement.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. Click on the name of the company or organizational unit associated with the engagement.

   A window showing information about the engagement is displayed.
4. On the Operations bar, click **Edit**.

   The **Edit Engagement** window is displayed, showing the current members of the engagement team (in the section of the window called "Harmonic team").
5. In the "Harmonic team" section of the window, click **Select**.

   The **Edit team members** dialog is displayed.

   The **Unassigned** column shows employees available to be added to the team.

   The **Assigned** column shows those currently on the team.
6. In the **Unassigned** column, click the name of the person you want to remove from the team, then click the left-arrow button.

   The person's name is transferred from the **Assigned** column to the **Unassigned** column.

   NOTE

   The shortcut of double-clicking to move people from one column to the other does not work in going from the Assigned column to the Unassigned column. Instead it activates an unrelated function (a dialog for assigning roles to team members).
7. Repeat Step 6 for all the employees you want to remove from the engagement team.
8. When you are finished removing team members, click **Done**.

   The **Edit team members** dialog closes.

   The employee(s) you removed from the engagement team is (are) no longer included in the list in the "Harmonic team" section of the **Edit Engagement** window.
9. In the **Edit Engagement** window, click **Save** to save your work.

A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the engagement. The "HARMONIC TEAM" section of the **Properties** box no longer includes the team member(s) you removed.

Changing an Engagement Team Member's Role(s)

To change the role(s) of a member of an engagement team:

1. On the **Navigation bar**, click the **Slates** tab.

   The front page of the **Slates** area is displayed.
2. Use the **Search** tab to generate in the **Slates** table the name of the company or organizational unit associated with the engagement.

   For information on using the **Search** tab, see the section "__________," in Chapter 3.
3. Click on the name of the company or organizational unit associated with the engagement.

   A window showing information about the engagement is displayed.
4. On the Operations bar, click **Edit.**

   The **Edit Engagement** window is displayed, showing the current members of the engagement team (in the section of the window called "Harmonic team").
5. In the "Harmonic team" section of the window, click **Select**.

   The **Edit team members** dialog is displayed.

   The **Unassigned** column shows employees available to be added to the team.

   The **Assigned** column shows those currently on the team.
6. In the **Assigned** column, click on the name of the team member whose role(s) you want to edit, then click **Select role(s).** (Alternately, double-click on the person's name.)

   A dialog for assigning roles to the chosen team member is displayed.

   NOTE

   For information on team members roles, see __________________.
7. Check the box(es) for any role(s) you want to add for this person.
8. Clear the box(es) for any role(s) you want to take away for this person.
9. Click **Done.**

   The **Edit team members** dialog is displayed again.
10. Repeat steps 6 through 9 for all team members whose roles you want to edit.
11. When you are finished editing team members' roles, and with the **Edit team members** dialog showing, click **Done.**

    The **Edit team members** dialog closes.
12. In the **Edit Engagement** window, click **Save** to save your work.

    A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the engagement. The "HARMONIC TEAM" section of the **Properties** box reflects the changes you made in the team members' roles.

WORKING WITH PROGRAM TEAMS

WORKING WITH CAMPAIGN TEAMS

WORKING WITH PROJECT TEAMS

[Sections to come: on programs, campaigns, and projects.]

Chapter 8
Working with Programs, Campaigns, and Projects

[Introduction to this chapter will define the terms programs, campaigns, and projects; discuss where creating and editing them falls in the UN workflow; identify who performs the respective activities associated with these work units; and preview the operations to be covered in the chapter. It will state that programs are attached to companies and organizational units, while campaigns and projects are attached to programs.]

Projects is work we do for a client that's not campaign-related.

WORKING WITH PROGRAMS

[Introduction TK]

Creating Programs

To create a new program:

1. On the **Navigation bar**, click the **Slates** tab

   The front page of the **Slates** area is displayed.
2. On the **Operations bar**, click **Create new>> Program.**

   A dialog for associating a new program with a company or organizational unit is displayed.

   NOTE

   Programs can only be associated with companies or organizational units, and only those with which an engagement has been set up [confirm].
3. In the dialog's directory, locate the name of the company or organizational unit to which you want to attach the new program.
4. Click on the name of the company or organizational unit.

   The **New Program** window is displayed.
5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Comment: An open-ended field for general comments on the program. [Examples]

   Objective: For example, "Maximize ROI for client for the summer 2001 campaigns and projects."

   Start date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.

   End date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.
6. Click **Save.**

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the newly created program.

To correct or edit the information you just entered:

1. With the program's **Properties** box displayed, click **Edit** on the Operations bar.
   The **Edit Program** window is displayed for the newly created program.
2. Make your changes and click **Save.**
3. The program's **Properties** box is displayed again, now incorporating your changes.

WORKING WITH CAMPAIGNS

[Introduction TK]

Creating Campaigns

To create a new campaign:

1. On the **Navigation bar**, click the **Slates** tab.
   The front page of the **Slates** area is displayed.
2. On the **Operations bar**, click **Create new>> Campaign**.
   A dialog for associating the new campaign with a program is displayed.

   NOTE
   Campaigns can only be associated with programs.

3. In the dialog's directory, using the plus to expand the directory as necessary, locate the name of the program to which you want to attach the new campaign.
4. Click on the name of the program.
   The **New Campaign** window is displayed.
5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Description: Open-ended field for a general description of the program.

   Objectives: For example, "Increase branding awareness across golf-based Web sites."

   Start date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.

   End date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.
6. Click **Save**.
   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the newly created campaign.

To correct or edit the information you just entered:

1. With the campaign's **Properties** box displayed, click **Edit** on the Operations bar.
   The **Edit Campaign** window is displayed for the newly created campaign.
2. Make your changes and click **Save.**
3. The campaign's **Properties** box is displayed again, now incorporating your changes.

[Section on Summary/Traffic Tabs]

WORKING WITH PROJECTS

[Introduction TK]

[A project is work we do for a client that's not campaign-related.]

Creating Projects

To create a new project:

1. On the **Navigation bar**, click the **Slates** tab.

   The front page of the **Slates** area is displayed.

2. On the **Operations bar**, click **Create new>> Project**.

   A dialog for associating the new project with a program is displayed.

   NOTE

   Projects can only be associated with programs.

3. In the dialog's directory, and clicking on the plus signs to expand the directory as necessary, locate the name of the program to which you want to attach the new project.

4. Click on the name of the program.

   The **New Project** window is displayed.

5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Type: Choose an option from the drop-down menu. The available options are: Other, Research, Strategy, and User Experience.

   Objectives: For example, "Conduct a focus group to find out if consumers are happy with client's product."

   Start date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.

   End date: Click **Select date** to bring up a calendar from which you can choose a date with a mouse-click.

6. Click **Save**.

   A window in UN's **Slates** area is displayed, showing, on the right side of the screen, a **Properties** box with information on the newly created project.

To correct or edit the information you just entered:

1. With the project's **Properties** box displayed, click **Edit** on the Operations bar.

   The **Edit Project** window is displayed for the newly created project.

2. Make your changes and click **Save**.

   The project's **Properties** box is displayed again, now incorporating your changes.

Chapter 9
Working with Documents

[This chapter will discuss all the aspects of working with documents, including uploading, editing, cloning, and viewing. It will also explain the concepts of checking documents in and out, versioning, and reverting to a previous copy of a document. In addition, it will detail who will be responsible for which operations.]

[Note to Tamara: new in tool since I wrote this--and still not operable as of 033001--are three items on Documents page Search tab: two dropdown boxes (Type and Status) and one field (Job #).]

Asset vs. Document

In UN, the words asset and document are used interchangeably. The terms refer to any files created on users' computers and uploaded into UN, where they then become available for viewing and other uses by everyone on the system. These files can be created in any application (Excel, Word, Photoshop, and so on).

Assets and Asset Slots

There is an important distinction in UN between the asset and the asset slot. The asset slot is a niche created in the system and labeled with certain properties. The asset or document is a file created in an application (such as Excel or Word) and uploaded into this niche. In addition, any time an asset is revised, the revised version is stored in the slot alongside the old ones. Both the asset slot and the asset have properties associated with them that can be edited. In addition, assets can be edited at the level of content (for example, making changes to a .gif file in Photoshop).

History and Versions

Typically assets undergo numerous revisions over the course of their lifetime. UN keeps a copy of every version of an asset as well as the version's properties information (such as when it was last checked in). Collectively, this material is the asset's history. The original version of a document is known as version 1; the version with the highest number is the most recent.

In opening assets to review and edit, you must choose which version of the asset to open and look at. Most often you will want the latest one (the one with the highest version number). It is also possible to go back to an older version of an asset and make that version the current version (a process known as "Rollback").

Automated and Non-Automated Documents

In UN, most documents are "non-automated." However, a few types of documents, found exclusively at the channel level or below, are what are known as "automated" documents, meaning their fields (all are based on Microsoft Excel templates) correspond to data that is stored in a central location in the system; that data is periodically updated through the working of various system processes. With non-automated documents, there is only one option for viewing (at the appropriate window in UN, just click on the button on the Operations bar called **View Version** or **View**). However, with automated documents, you have a choice of what rendition of the document to look at. This difference can be summarized as "View Version" vs. "View Current."

"View Version" vs. "View Current"

View Version and **View Current** are the names of two buttons in UN that the user may choose between when reviewing automated documents. What they refer to is two renderings of the same document, the renderings having the same fields and headings but potentially different data. The potential difference is a function of the automation process described above.

Choosing **View Version** shows you the document as it was most recently saved into the system by a human. Choosing **View Current** gives you a potentially more up-to-date document: it shows you the same document but this time with the fields filled in with the most up-to-date data available from the central data store.

Check-in and Check-out

When a new asset is uploaded into UN, the system considers it to have been "checked in." Thereafter, people can view the document with it still checked in, but to edit it they will have to check it out. When an asset is checked out to one user, others can view it but not change it. UN indicates that a document is checked out with a message such as, "Locked for edit by: Doe, John." A person can check out as many documents at once as they like.

When a user checks a document out for editing, he must save it to his computer and edit it there. When the person is finished with the edit, he then uploads the edited version into the asset's slot, where it takes its place as the latest version of the document, alongside all of the previous versions. UN will now consider the asset "checked in" and make it available for editing by other people.

IMPORTING ASSETS

Importing an asset means uploading it from your computer into UN for the first time.

Importing an asset is a two-stage process. First you create the slot for the asset in UN, then you upload the document from your computer or the network into the newly created slot.

NOTE

This process assumes that you have already created the asset and that it is available for upload from your computer or the network.

To create a slot for a new asset in UN:

1. On the **Navigation bar**, click on the **Documents** tab.

   The first page of the **Documents** area is displayed.
2. On the **Operations bar**, click **Add New Asset**.

   A dialog showing the **Slates** directory is displayed.
3. In the dialog's directory, navigate to the slate with which you want to associate the new asset.
4. Click on the name of the slate.

   The **New Asset** window is displayed.
5. Complete the fields in the window. Fields with an asterisk are required. Special cases are explained below:

   Category: Choose an option from the drop-down menu.

   Description: For example, "Contains girl with the red dress"

   Keywords: For example, "girl red". (Keyword searches are not possible in UN 1.0 but should be in subsequent versions of the product.)

   Job #: Assigned by EM group (which will devise a standard for assigning numbers), job # allows grouping of related assets. Field is alphanumeric. Because Job # is one of the column heads in the Documents table, it is possible to sort by this value.

   Option #: Used primarily by Channel Management. Refers to which of various media options the asset belongs to, if more than one is prepared for a client. Only three kinds of documents have different option numbers: Planning Matrix, Test Worksheet, and Media Schedule.
6. Click **Save**.

A slot is created in UN for the new asset.

To import the asset into the slot:

1. Click **Check out**.

   A window indicating that the asset is locked for edit by you is displayed.
2. Click **Check in**.
3. The **Upload Asset** window is displayed.
4. Click **Browse**.

   The **Choose file** dialog in Microsoft Windows is displayed.
5. Navigate to the file you want to upload into UN.
6. Click on the name of the file then click **Open**. (Alternately, double-click on the name of the file.)

   The **Choose file** dialog closes and the file's path and name appear in the **File** field of the **New Asset** dialog.
7. Review, edit, and complete the dialog's remaining fields as explained below:

   Description: Edit previous information as desired.

   Keywords: Edit previous information as desired.

   Describe Changes: Suggested text is "Initial Version." (In working with subsequent versions of this asset, you can use this field to describe the changes that distinguish the new version from the previous version.)
8. Click **Upload Source**.

   The asset is uploaded into UN.

   A screen showing information on the newly uploaded asset is displayed.

EDITING AN ASSET

The steps involved in editing an asset can be summarized as follows: navigating to the asset page, checking the asset out, saving it to your hard drive, editing it, and uploading the edited version back into the system (where it becomes the latest version and will reside in the asset slot alongside the previous versions of the same asset).

TIP

Before you begin editing documents in UN, create a folder on your hard drive with a name such as C:\\Harmonic\UN. If you copy assets into this folder when you are downloading them for edit, it will make it easy for you to find them when the time comes to upload the edited version back into UN.

To edit an asset:

1. On the **Navigation bar**, click on the **Documents** tab.

   The first page of the **Documents** area is displayed.
2. Using the filter, call up in the Documents table the name of the asset you want to edit.
3. Click on the asset name.

   A screen showing information on the newly uploaded asset is displayed (this is known as the assets page).

NOTE

If the asset is checked out to another user you will have to wait until that person checks it back in before you can edit it.

4. On the Operations bar, click **Check out**.

A window indicating that the asset is locked for edit by you is displayed.

5. On the Operations bar, click **View Version.**

   The asset is opened in the appropriate application, inside Internet Explorer.

6. If the asset is not in HTML, skip to Step 7. If the asset is in HTML: On the **View** menu, click **View Source.**
7. On the File menu, click **Save As...**
8. In the **Save As...** dialog, navigate to the folder where you save UN files for editing.

NOTE

If you have not previously created a folder on your hard drive where you save UN files for editing, now is a good time to do so. Downloading assets into a folder with a name such as C:\\Harmonic\UN will make it easy for you to find them when the time comes to upload the edited version back into UN.

9. In the **Save As...** window, click **Save.**

NOTE

If you have trouble saving the file, it might be because of certain symbols present in the system-generated file name. Try changing the name to a friendly name.

10. On the Internet Explorer file menu, click **Close.**
11. Open the copy of the asset that you saved to your computer.
12. Edit the asset.
13. When you're done editing (this might be days after you checked the asset out), save and close the asset.
14. In UN, navigate to the asset page. The page should indicate that the asset is still checked out to you. (However, managers do have the capability of canceling other people's checkouts, something they might need to do if a person were out sick, for instance.)
15. On the Operations bar, click **Check In.**

    The **Upload Asset** window is displayed.

16. Click **Browse.**

    The **Choose file** dialog in Microsoft Windows is displayed.

17. Navigate to the edited file.

IMPORTANT

Make sure you pick the right file!

18. Click on the name of the file then click **Open.** (Alternately, double-click on the name of the file.)

    The **Choose file** dialog closes and the file's path and name appear in the **File** field of the **Upload Asset** dialog.

19. Review, edit, and complete the dialog's remaining fields as explained below:

    Description: Edit previous information as desired.

    Keywords: Edit previous information as desired. (Keyword searches are not possible in UN 1.0 but should be in subsequent versions of the product.)

    Describe Changes: Summarize the changes you made.

20. Click **Upload Source.**

    The asset is uploaded into UN. A screen showing information on all the versions of this asset is displayed. The newly uploaded version will be listed at the bottom of the History table and have the highest version number (indicating that it is the latest version).

Deleting Assets

The only option for deleting assets in UN is deleting the asset slot and everything in it.

WARNING

There is no confirmation dialog when you delete an asset slot.

To delete an asset slot: With the asset page showing, click **Delete** on the **Operations** bar. The asset slot and all associated documents are deleted.

Copying an Asset

UN makes it possible to copy a version of an asset and paste it at any level in the system where documents are accepted for upload. This process is also known as cloning.

To copy an asset:

1. Navigate to the asset page for the asset you want to copy.
2. If the version you want to copy is the latest one for this asset (the one with the highest version number), and if the Operations bar includes a **Copy...** button, click that button. If you want to copy a version other than the latest, or the Operations bar does not include a **Copy...** button, look over the **History** table and click on the version you want to copy; click the **View** button on the next window that is displayed.

   A directory for choosing where you want to place a copy of the file is displayed.
3. In the directory, click on the level where you want to put the copy.

   The file is copied to the location you chose and a window showing information on the copy is displayed.

Viewing an Old Version of an Asset

To view a previous version of an asset:

1. On the asset page, in the History table's Change Description column, click on the entry for the version you want to view.

   A window with information on that version of the asset is displayed.
2. On the **Operations** bar, click **View**.

   The asset is opened in the appropriate application, inside Internet Explorer.

Rolling Back to an Old Version of an Asset

UN makes it possible to copy an old version of an asset and paste it at the end of the line so it becomes the latest version. This process is known as "Rollback."

To roll back to a previous version of an asset:

1. On the asset page, in the **History** table's **Change Description** column, click on the version of the asset you want to reposition as the latest version.

   A window displaying information on that particular version is displayed.
2. On the Operations bar, click **Rollback**.

   The asset page for the asset is displayed, showing a new version as the latest one, namely a copy of the one you just directed be rolled back.

Abandoning Check Out

Sometimes you might need to abandon a check out of an asset and make it available to other users. UN makes this easy to do.

To abandon a check out: On the asset page, on the Operations bar, click **Revert.** The asset page resets, now without the red text saying the asset is locked for edit by you.

Chapter 10
Working with Tasks and Approvals

[This chapter will discuss tasks and the approvals process.]

CREATING TASKS

To create a new task:

1. On the **Navigation bar**, click on the **Tasks** tab.

   The first page of the Tasks area is displayed.
2. On the **Operations bar**, click **New Task**.

   A dialog showing for associating the new task with a slate is displayed.
3. In the dialog's directory, and clicking on the plus signs as necessary to expand the directory, locate the slate for which you are creating the new task.
4. Click on the name of the slate.

   The **New Task** window is displayed.
5. Under **Type**, choose an option from the drop-down menu. The options are: Approve, Contact, Create, Deliver, Other, Release, Research, Review.

   When you make your selection, the window is reset with fields appropriate to the type of task you chose.
6. Complete the rest of the fields. Fields with an asterisk are required. Special cases are explained below:

   NOTE

   Depending on the type of task you chose, you may not see all of the fields listed below.

   Subject:

   Asset:

   Description:

   Assigned to:

   Priority:

   Due date:

   Job #:

[Review and refine: Only Approve causes a field reset.]

7. Click **Save**.

[Instruction set incomplete.]

Chapter 11
Working with Reports

UN enables you to run several common advertising-industry reports against information in the database, and to paste the results into Microsoft Excel spreadsheets. (You can copy report information into other applications too, such as Word or Notepad, but the results look best when you use Excel.) These reports, also known as queries, are already set up in the system. They include:

- List of Insertion Orders by Client
- List of Insertion Orders for All Clients
- List of RFPs by Vendor by Date Range
- Summary of Booked Dollars/Impressions/Clicks by Vendor
- Summary of Client Ad Serving Costs by Campaign
- Summary of Client Booked Dollars/Impressions/Clicks by Campaign by Channel
- Summary of Client Booked Dollars/Impressions/Clicks by Campaign by Phase
- Summary of Client Booked Dollars/Impressions/Clicks by Campaign by Phase by Date Range
- Summary of Client Booked Dollars/Impressions/Clicks by Vendor by Campaign
- Summary of Client Booked Dollars/Impressions/Clicks by Vendor by Campaign by Date Range

To run a report and view the results:

1. On the Operations bar, click **Reports**.
2. Click on the report you want to run.

   If you chose "List of Insertion Orders for All Clients," an empty table with the headings appropriate to your search is displayed. Skip ahead to Step 5.

   If you chose any report other than "List of Insertion Orders for All Clients," a window for inputting additional information necessary for your query is displayed. The window shows the name of your query and includes one or more of the following fields: **Choose Client, Client Name, End Date, Start Date,** and **Vendor Name.**
3. Complete the fields in the window.
4. Click **Run.**

   An empty table with the headings appropriate to your search is displayed.
5. On the Operations bar, click **Copy report to clipboard.**

   The data for your report is stored on your computer's clipboard. (This process is invisible.)
6. Open Microsoft Excel to a new worksheet.
7. Paste the contents of the clipboard into the worksheet using as the insertion point Cell 1A (the cell in the top left corner). Two ways to do this are:
   a) With Cell 1A activated, click the **Paste** icon on the **Standard toolbar**. Or,
   b) Position the cursor over Cell 1A, right-click with your mouse, and choose **Paste** from the pop-up menu.

   The information from your report is pasted into the Excel document.

NOTE

You can paste report information into other applications, such as Word or Notepad, but the results are best when you use Excel.