

PiSA sales administrator documentation

Simplified template management

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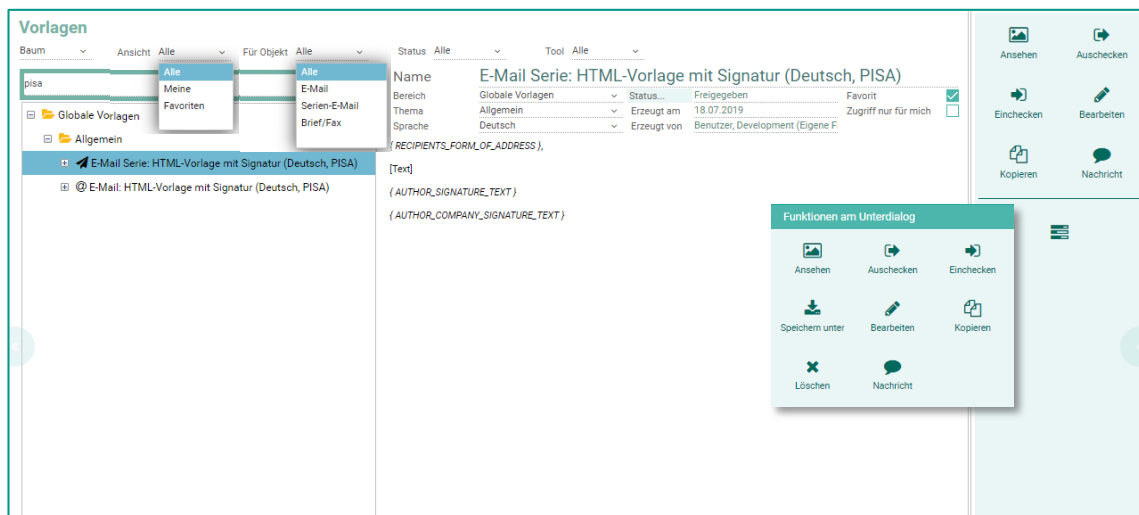
The goal of simplified template management is to increase the usability of template management for end users.

This goal was achieved by a new template form for correspondence templates that is simplified for the end user and has a greatly reduced range of functions.

For administrators, the Backoffice/Templates menu still opens the familiar "old" form with the full range of functions. Administrators in this sense are

- Members of one of the groups 41 or 43 or 49
- Users with the PiSA Cubes admin flag.

For all other users, the Backoffice/Templates menu opens the new simplified template form with the reduced functionality.



Note:

A user cannot have both forms.

In the simplified form, "real" reports and data sheets are filtered away by a search entry in the **LOA_OBJ_IDN** field for **PSA_CPD_%**. What remains are correspondence templates. This means, in the field **For object** of these templates one of the following objects must be selected:

Name	Position	Identifier
Emails	370	PSA_CPD_EML
Emails - Questionnaire	380	PSA_CPD_EML_QST
Emails - GDPR	390	PSA_CPD_EML_DPR
Emails - Series	400	PSA_CPD_EML_XPL
Emails - Series - Questionnaire	410	PSA_CPD_EML_XPL_QST
Emails - Series - GDPR	420	PSA_CPD_EML_XPL_DPR
Letters	430	PSA_CPD_LET
Fax	440	PSA_CPD_FAX
Letters/Fax	450	PSA_CPD_LAF

Conversely, you may not assign any of the values from the above list to templates that are not intended for letters and e-mails in **For object**, otherwise the respective templates will be offered in the simplified form as well as in the template selection.

In the simplified template management, all basic functions are grayed out except for "Print" and "Access":

- New
- Duplicate
- Structure copy
- Delete

Some **template-specific** implementations of basic functions are located only in the toolbar:

- + View
- + Check out
- + Check in
- + Save as
- + **Edit**
- + **Copy**

In the course of simplification, the following tabs, data fields and assignments have been hidden:

- + *Template ID, Version, Revision*
- + *XML loader object*
- + *Output format*
- + *Valid from, Valid until*
- + *For object*
- + *Tool*
- + *Sample data filter*
- + *Parameter*
- + *Comment*
- + *Single report, Max. Reports*
- + *Database*
- + *Layout*
- + *Template elements*

As a result of the simplification described above, the end user may only copy and edit templates that have been made available to him administratively.

When copying, the question whether a new version should be created is omitted. A completely new template is always created. The copy of the original receives the ID of the original plus the postfix "_2". If this already exists, the next free number is generated. After "_9" comes "_10". If a template with postfix is deleted, there will be a gap in the consecutive numbering. This gap will be filled during the next copying process.

Example:

The user copies **PSA_RPT_CPD_EML_PLH_1**.

PSA_RPT_CPD_EML_PLH_2 and **PSA_RPT_CPD_EML_PLH_3** already exist.

So the copy gets the ID **PSA_RPT_CPD_EML_PLH_4**. Version and revision of the original are also copied.

With Tool **PiSA sales** and **Word series**, the template file is displayed in a preview window (read-only) on the right. For BIRT templates, the BIRT logo appears instead. To edit the template, click on the "Edit" function in the toolbar (as in the full template form). The functionality is identical in both template forms. If the administrator wants to support BIRT template editing, he must provide a working sample data filter.

Template categorization

New in both forms is a categorization of the templates with 2 levels, which is used for correspondence templates. The 1st level is called **Scope**, the 2nd level is called **Topic**. The administration mask can be found under **Administration/Reports/Template scopes**. In PiSA sales standard the following areas and topics are delivered:

Template scopes

Name


Global templates

Topics

	Sequenc	Identifier	Name
→	10	PSA_RPT_TYP_001_GLB_GI	General
	20	PSA_RPT_TYP_001_GLB_DI	GDPR
	30	PSA_RPT_TYP_001_GLB_QI	Questionnaire
	40	CSO_RPT_TYP_001_GLB_TI	Test
	40	PSA_RPT_TYP_001_GLB_IN	Inxmail
	50	PSA_RPT_TYP_001_GLB_CI	CleverReach
	60	PSA_RPT_TYP_001_GLB_M	PiSA sales Mailer
*			

General

	Sequenc	Identifier	Name
→	10	PSA_RPT_TYP_001_GLB	Global templates
	20	PSA_RPT_TYP_001_SAL	Vertrieb
	30	PSA_RPT_TYP_001_MKT	Marketing
	40	PSA_RPT_TYP_001_SVC	Service

The topics above refer to the scopes below. Select a scope to see the topics related to it.

As an administrator, you can delete default scopes and default topics (release proof) and add your own. Deletion is only possible if the respective entry is not used in any template. Therefore, first create your own scopes and topics, then correct the assignment and finally delete topics and scopes that you do not need. Since the deletion process of standard entries is recorded in the journal, it will be repeated automatically in case of an update.

Scopes, topics and templates are displayed as a tree structure when selecting a correspondence template.

You will see only complete branches in the tree.

I. e.

Because in the standard the scopes **Sales**, **Marketing** and **Service** have no topics, they are not displayed.

Because in the default **Global Templates** section the topics **DSGVO**, **Questionnaire**, **Inxmail** and **CleverReach** are not assigned to any template, they are not displayed.

From the remaining branch **Global templates/General** only templates are displayed,

- where the **For object** matches the correspondence type
- where the language matches the correspondence language
- where the user has at least read access
- where the templates are released.

Access only for me

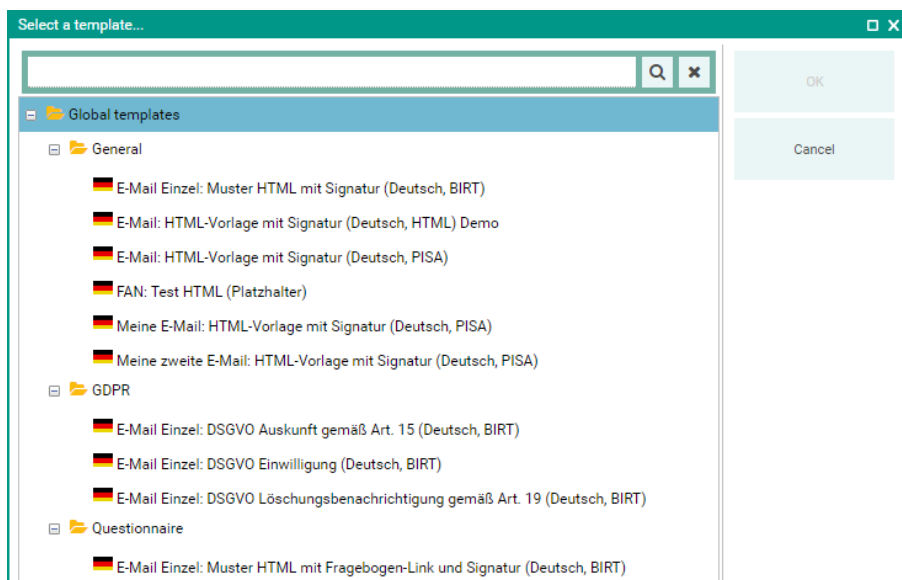
The "Access only for me" flag affects access in the following way:

When the flag is active, the access string is refilled with **D, D43, D49**. Only you and some administrators have full access. Others do not have read access, so they are not allowed to select the template. **D, D43, D49** can be controlled by the environment variable **PSA_RPT_DEF_USR_ACC**. If the flag is inactive, the group of the company with read access is added to the access string, e.g. , **R2011**.

Now all persons of your department are allowed to select the template.

Since only the owner is allowed to change "Access only for me", the access of templates provided administratively is protected.

After all filtering, the following remains in the standard for an e-mail, for example:



Note:

A branch in the tree like **Xyz/Other/Email xyz** appears because this template is assigned to a scope. No subject is entered on the template itself. In this case, the system supplements the missing 2nd level with the fictitious topic "Other". In the administration, therefore, a cope must not necessarily have topics.

Loader

When copying a template, the loader is also copied if it is a standard loader (owner (PSC_OWN) = **45** = **PSA**). The copy gets the name of the original, where the prefix **PSA** is replaced by **CST**. It is copied only if a copy does not already exist. If the standard loader is not sufficient for your needs, you should therefore build your own CST loaders from the beginning and assign them to the templates that you want users to copy.