Media Pool

User Manual

Version 8.0

Your feedback is important to us!
We are always grateful for tips on errors. Simply send us an e-mail to documentation@uptempo.io.

Content

Start 1

Upon closer inspection, it becomes clear that the administration process in the Media Pool module can be divided into a number of basic tasks, such as Create asset, Search for asset, or Use asset. The asset tasks are described extensively in the following chapters. To find out more about what an asset is, please refer to the *Assets – Basics* on page 19 section.

Recommended for new users

If you are unfamiliar with Media Pool, we recommend that you familiarize yourself with the following tasks:

- *Searching* on page 93

- *Usage* on page 193 > *Save* on page 196 and *E-Mail Delivery* on page 198

Please note that assets must have already been created. If no assets have been created, please begin with the *Create* on page 63 section.

For experienced users using a new version

If you are an experienced user and would like an overview of the new functions in the current version 8.0, please refer to the *New and Changed Functions* on the facing page section.

1.1 New and Changed Functions

In this version, a completely redesigned import makes it much easier to import and edit new assets.

Asset Editing Limit Removed

This release removes the limit on the number of assets that can be edited in a single session. Previously, editing was limited to a maximum of 200 assets per session. Now you can edit an unlimited number of assets at the same time. This change will make life easier for editors and content creators who need to create and edit a large number of assets. They will be able to work without intermediate steps. It should be noted, however, that editing a large number of assets at once can also mean that saving changes takes longer than usual.

Import Button inside Import Window

The *Import* functionality has been completely redesigned. The update gives users full control over importing files. Instead of creating a new folder each time, the user can now upload files to an existing folder or create a new folder.

An *Import* button has been added to the upper right corner of the Import page. Clicking the *Import* button opens a new window with the Upload component. This allows users to upload additional files to an existing import folder. In previous versions, a new folder was created for each import.
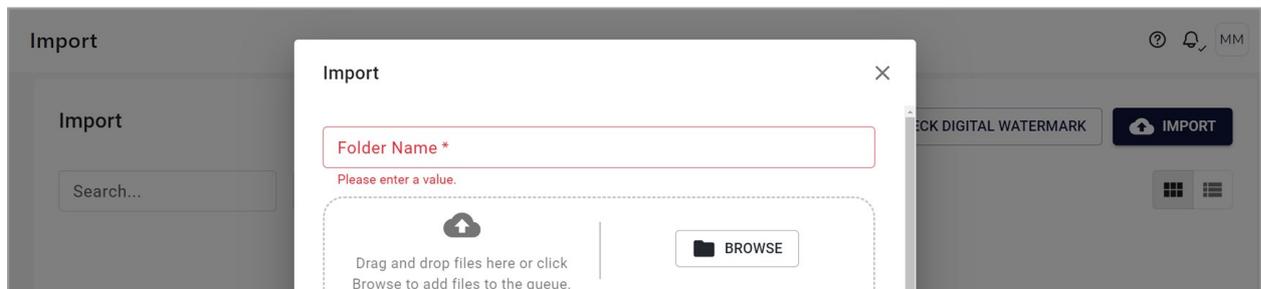
Custom Import Folder Name

When uploading assets, users can enter a custom name for the import directory or use an existing name. This makes it easier to find uploads later. In previous versions, "Upload, Date, Time" was the default name pattern for the import directory, but no custom directory could be selected for import.

Benefits:

- Easier identification of assets after upload, as the folder has been given a meaningful name by the user.

- Better organization and structuring of uploaded assets with the ability to name import folders.

- Differentiate uploads by folder name for faster retrieval and sorting.

Rules and Restrictions for the Upload Folder name:

- The name is a mandatory field and must not be empty.

- The name is limited to 255 characters.

- Once the upload has started, the folder name can no longer be changed.

In summary, this means that users must specify a folder name when uploading that is between 1 and 255 characters long and contains only valid alphanumeric characters and spaces. Once the upload has begun, the name cannot be changed. This ensures that the folder name is consistent and can be used to identify assets.

Drag-And-Drop Upload Directly into the Window

Compared to previous versions, users can now drag and drop local files from their computer into the search results or the open import area to upload them. The previous import option is still available. When a file is dragged into the window, a drag-and-drop area appears where files can be dropped.

When you release the mouse button, the Import dialog lists the files to be uploaded, but you still need to specify the new folder name or an existing folder before importing. If you do not have permission to upload individual media, no drop zone is displayed. In addition, the drop zone is not displayed when a dialog (widget) is open in the search results.

Drag-and-drop uploading provides a more convenient way for users to upload files, improving the user experience.

Improvements of the Import Dialog

These enhancements make the Import dialog more convenient and efficient for users.

- The new *To Import* button allows users to access the assets in the import folder immediately after importing. This eliminates the need to locate the folder in the import area as in previous versions.

- A new close button has been added to the Import dialog. Users can close the dialog if they want to edit the assets later, or if they decide not to upload anything after all.
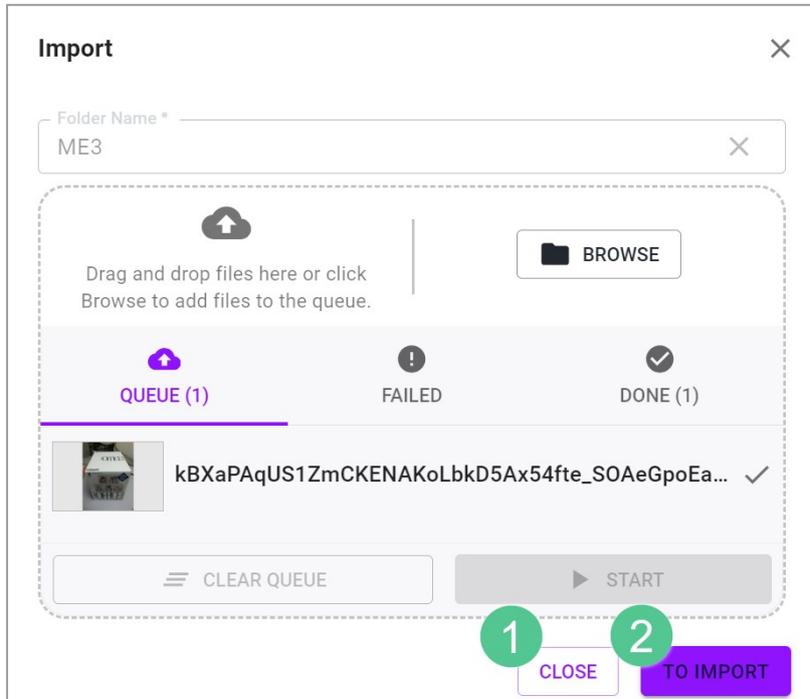
The buttons (1 *Close*, 2 *To Import*) allow users to close the Import dialog after uploading or to access the imported assets directly. Clicking *To Import* eliminates the need to search for the import.

Asset Removal Warning

There is a new confirmation dialog that appears when users attempt to remove assets from their own collection. This prevents other users from unintentionally losing access to an asset in a job or review if the original uploader removes it. The dialog informs users that removing the asset may affect other users and that they must explicitly confirm before the asset is actually removed.

Faster Uploads of Large Files

We've made uploading files faster and easier for you. Here's what's new:

- Better upload feedback: You'll now see clear status messages throughout the upload process, so you always know what's happening with your files. No more guessing if your upload is complete.

- Faster security checks: We've sped up the virus scanning process, helping you get your files uploaded more quickly and reliably.

Complex Search Queries

When more than ten items are selected in search fields such as text search, categories, file type/extensions, or tags, the extra items are now truncated to "...".

Previously, only the first ten items were displayed in full, and other items were missing. This was confusing to the user, as the full selection was nowhere to be seen.

The ellipsis ... lets users know that the selection is larger than the ten items displayed. This lets users know that they may need to narrow their search criteria to get better results. At the same time, users can see that all selected search criteria are being considered, not just the visible entries. Hovering over ... displays all items in a tooltip.
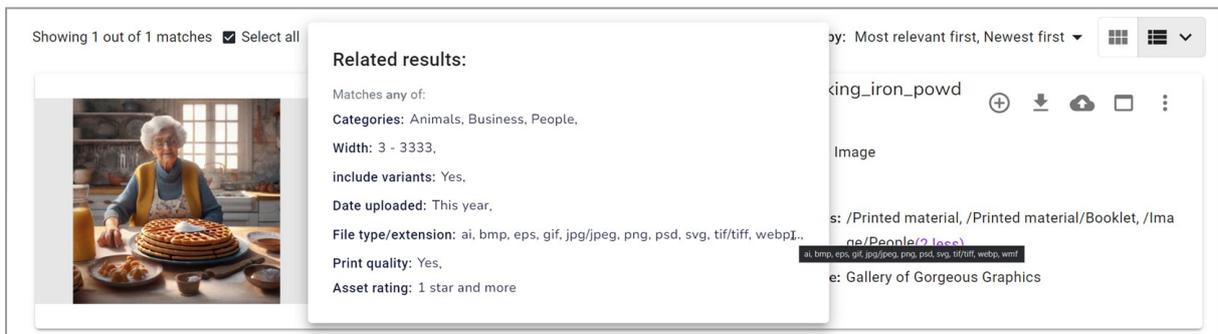
This improvement helps to display complex search queries in a more user-friendly way.

Show File Type in List View

This little feature is useful for those of you who do not use the *Gallery view*, but want to see the search results as *List view*.

In *List view*, the file type is now also indicated by a colored marker before the asset name.

For a complete overview of all changes, please refer to the Release Notes 8.0.

1.2 Target Group

This manual is intended for users who use the Media Pool module to create graphics, documents, videos, and audio files as assets, manage these assets, and download them for further use.

> **Note**
>
> In Digital Asset Management (DAM), the permissions and roles concept is essential for defining which functions a user is allowed to execute. This helps ensure that users have appropriate access and capabilities based on their roles within the system.
>
> A user is linked with a role. Permissions are assigned to the role. This concept is implemented on a customer-specific basis. If you are unable to call functions or areas that are described in this manual, it may be because you do not have the necessary permissions. If you have any questions, please contact your system administrator.

1.3 Style Conventions

Notes appear in a gray box.

Warnings appear in a red framed text box.

Paths to follow are written like this: *Click > x and then > y*.

1.4 Additional Documentation

This page provides links to documents containing additional information.

- Media Pool Administrator Help 8.0

Links to documentation for other Uptempo Work modules are provided at the following link:

- Work: Online User Help

Assets – Basics

2

When you upload a file in the module, *Media Pool* you create an asset. In addition to the file, the asset also includes previews with which the file is visually represented in the module *Media Pool*. In addition, you create attributes that describe the file, determine the visibility of the file for other users, or allow you to search for the file.

The following sections provide additional information:

- *Asset Attributes* on page 228

- *File Formats* on page 25

- *Visibility* on page 26

- *Owner* on page 27

- *Status* on page 28

- Display of assets: *Asset* on page 33 in Chapter *Structure* on page 31

2.1   Asset Types: Introduction

As a user of the module *Media Pool*, asset types are your best friends. Asset types are like forms for digital content. They help you manage and retrieve images, videos, documents, and other files.

How Do Asset Types Make My Job Easier?

- Time-saving: No more guessing what information to enter. The asset type provides exactly the attribute fields you need.

- Fewer errors: Using predefined fields and partially pre-filled values reduces the risk of typos and inconsistent entries.

- Faster retrieval: When searching for assets later, the structured information helps you find exactly what you need.

- Better collaboration: By using uniform structures, every team member can quickly get up to speed after brief training.

Using Asset Types

After Uploading:

- Consider: What kind of content is this?

- Choose the appropriate asset type from the list. Note: Not every user is permitted to assign asset types or modify existing assignments.

- Fill in the displayed fields. Pay special attention to required fields!

When Editing:

- The asset type determines which information you can view and change.

- Take the opportunity to add any missing information.

When Searching:

- Think about the asset types and their attributes. You can filter by these in widgets!

- Example: You are looking for all product photos (asset type) with the color tag red (attribute).

What Should I Be Aware Of?

- Required fields: You must fill these in. They are marked with an asterisk *.

- Pre-filled fields: Check if the entered information is correct for your asset.

- Descriptions: Read these. They help you choose the right asset type.

Tips & Tricks

- Take your time: Choosing the right asset type pays off later.

- Be thorough: The more known information you enter, the easier it will be to find the asset.

- Stay consistent: Always use the same asset type for similar content.

- Ask questions: Your administrator or experienced colleagues are happy to help.

- Give feedback: Missing particular asset type? Talk to your administrator.

Benefits

Using the correct asset types makes your work more efficient and helps the whole team. Your assets are easier to find, use and manage. This saves time, reduces frustration and makes your work in the module *Media Pool* easier.

> **Note**
>
> Correctly selecting an asset type and entering data carefully makes future work easier. This is an important foundation for smooth digital asset management in your organization.

Related Tasks

- Create

- The Upload Process

- Import Area

- Completing the Attributes of an Asset

- Completing the Attributes of Several Assets at Once

- Completing the Attributes of Multiple Assets One by One

2.2 Asset Attributes

This section describes the asset attributes available in the *Media Pool* module.

> 📋 **Note**
>
> Note that in some circumstances, not all of the attributes are used in your system. In addition, the display of the attributes depends on the selected asset type. Which asset types exist in your system and which attributes are assigned to the types depends on the configuration of the system. If you have any questions, please contact your system administrator.

The asset attributes are divided into the following groups:

Basic Attributes

The basic attributes include mandatory attributes that must be edited for each asset before the asset is *Media Pool* available in the module. In addition, this group includes attributes that each asset receives automatically, such as a unique asset ID. For more information, see *Basic Attributes* on page 229.

File Attributes

The file attributes are read from the file during upload and displayed in the module *Media Pool* module as information for the user. Note that some attributes depend on the file type such as document, pixel graphic or video. For more information, see *File Attributes* on page 230.

Descriptive Attributes

This group includes attributes that describe the asset and/or its content but that do not have a functional effect in the *Media Pool* module. It includes, for example, the assignment to countries or a language and a list of persons shown. For more information, see *Descriptive Attributes* on page 232.

Functional Attributes

Functional attributes are directly linked to the functions of the *Media Pool* module. The functions include, for example, asset versioning, publishing, and backups. The functional attributes describe the conditions in the relevant functions, for example, which version an asset has and whether it is published. For more information, see *Functional Attributes* on page 232.

Standardized Attributes

This group includes data that is standardized by organizations and maintained in the metadata of the file, such as camera data or IPTC Photo data. The standardized attributes are read out of the file during upload and displayed in the *Media Pool* module as information for the user about the asset. The user cannot edit these attributes. For more information, see *Standardized Attributes* on page 237.

2.3 File Formats

In principle, the module *Media Pool* allows you to upload common file formats, such as PDF, TIF, PNG, JPEG, DOCX ,PPTX, INDD, and so on. An administrator can specify which file formats may be uploaded in order to save only valid formats. If you want to know which formats can be uploaded to your system, or if you cannot upload files of a specific format, contact your system administrator. These are typically obsolete formats or formats that do not meet your company's standards.

2.4 Visibility

The visibility and accessibility of an asset depends on the following attributes:

Validity

If you use the *Validity* asset attribute, you can set invalid assets to be hidden after the set time period has expired. You can configure the validity for each asset in its attributes.

Virtual Database

Each asset is assigned to a virtual database. Virtual databases are combined in groups. Each user has access to a group of virtual databases and uses the group to reach the assets in the virtual databases contained in them if there are no other restrictions in place.

Categories, Affiliates, Organizational Units, and Permissions

The visibility of an asset can be controlled by assigning the asset to categories, affiliates, and organizational units and through the combination of permissions that you, as the user, receive. These functions are configured for each system. If you have any questions, please contact your system administrator.

Recycle Bin

Deleted assets are moved to the recycle bin and can only be found if the search option in the recycle bin is activated.

Variants

You can use the *Variants* function to flag assets that are an alternative version of a main asset. Variants can be found only if the option for finding variants is activated in a search.

2.5 Owner

The owner is the person responsible for an asset. The owner also processes requests for download approval. For more information, see *Download Approval* on page 182.

Responsibility for an asset can be transferred to another user, see the Chapter *Change Asset's Ownership* on page 137. Note that depending on the settings and permissions assigned, other users may be able to edit the attributes. In addition, the owner receives a notification in the following situations:

- If an asset is in the workflow for including it in a VDB that requires approval (upload approval), the owner also receives notification regarding the approval or rejection of the approval request.

- If this is set in your system: The owner receives a message if the validity of an asset expires.

- The owner is informed if the asset is handed over to a different user.

Change asset's ownership	Note: This option is available to the asset owner and users with the *Change Asset Owner* permission.

2.6 Status

An asset be in one of the following statuses:

Status	Description
Active and Official for versioning	The latest version of an asset is automatically the active version. For a version to become the official version, a user must flag it as official. There can only ever be one official version. The active version is used and displayed in the Media Pool module. In the *Job Manager*, *Marketing Data Hub*, *Review Manager*, and *Brand Template Builder* modules, the active version is used. The *Marketing Shop* module uses the official version.
Published	An asset is made available for use by third-party systems using the publication. Refer to *Publication Channels* on page 214.
Valid	The validity of an asset is set in its properties. When set accordingly, invalid assets are hidden. For more information see *Functional Attributes* on page 232.
Deleted	The asset is moved to the recycle bin. Only users that can access the recycle bin can find a deleted asset.

Status	Description
Subject to approval	The asset is in the workflow for adding it to a VDB that requires approval. An asset with this status cannot be edited and its detailed view cannot be opened. The status is displayed with a watermark in the preview image:
Approval required	To use the asset, a user must request a download approval. The status is displayed with a watermark in the preview image:

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

Structure

3

This chapter covers the structure of the module *Media Pool*. Please refer to the following sections:

- *Asset* on the facing page: This section covers the main elements which you will commonly encounter when dealing with assets. These are elements which you will open or use frequently in various different parts of the module.

- *Start Page and Search* on page 44: Under > *Assets* > *Search* you can access the homepage with the search function.

- *Import Page* on page 48: Under > *Assets* > *Import* you can access the functions *Import*, *Change owner*, *Show log Mass versioning of assets* and *Check digital watermark*.

- *Collections* on page 57: Under > *Assets* > *Collections* you can access your favorites and collections.

- *Approvals* on page 59: Under > *Assets* > *Approvals* you can access information about applications for download and upload approvals.

- *Reports* on page 61: Under > *Assets* > *Reports* you are able to access the standard dashboard of the module *Media Pool* in the *Reports* module.

3.1 Asset

This section covers the main elements which you will commonly encounter when dealing with assets. These are elements which you will open or use frequently in various different parts of the module.

- *Preview Images* below: In the module, *Media Pool* multiple preview images are generated automatically for a large number of file formats.

- *Detailed View* on the next page: The detailed view provides the attributes, preview images and specific functions for the asset.

- Editing the attributes: One central element is the dialog for editing asset attributes. You edit this dialog, for example, to create one or more assets or edit the attributes. For more information, see *Dialog Box for Editing the Attributes* on page 38.

- Displaying in the lists: Assets are occasionally displayed in a list, e.g. a list of search results, your favorites or a collection. For these lists, you can choose whether they should be displayed in a gallery view or in a list view. For more information, see *Gallery and List View* on page 41.

Associated Tasks

- *Opening the Detailed View* on page 132
- *Completing the Attributes of an Asset* on page 82
- *Completing the Attributes of Several Assets at Once* on page 85
- *Completing the Attributes of Multiple Assets One by One* on page 83

3.1.1 Preview Images

In the module, *Media Pool* multiple preview images are generated automatically to provide a graphical representation of assets. These are displayed in a number of locations, e.g. the Detailed View or search results (see *Start Page and Search* on page 44).

> **Note**
>
> The purpose of a preview image is to visually display an asset or provide information about its content. Preview images are not exact copies; instead they are optimized by automatic conversion for specific sizes, RGB color space, and lower image resolution. A preview image may therefore differ significantly from the original file.

Preview images of assets that have not been approved yet or that require approval are marked with a watermark.

Document previews can contain multiple pages if this is set up on your system and the document has multiple pages. In the detailed view of the corresponding asset, you can also play a low-resolution preview of the video in addition to the static preview image. A video player that you can use to play video files directly is integrated into the detailed view.

The zoom for a preview image is always set to the maximum available size in the detailed view and the preview.

> **Note**
>
> When zooming into a preview image, graphics or videos with a small size may appear unexpectedly pixelated. If the graphic is unexpectedly displayed in this way, check the actual resolution of the graphic by downloading the original version of the graphic and opening it in a suitable image editing program.

Elsewhere, such as in the dialog for editing asset attributes, the following applies: If an asset is smaller than 60 × 60 pixels, the preview image is automatically enlarged by a factor of 2, 3, or 4 up to a maximum of 120 × 120 pixels.

3.1.2 Detailed View

Each asset has a detailed view. The detailed view displays a preview and attributes of an asset. You can also access additional functions.

Opening the Detailed View

For information about opening the detailed view, see .

Structure
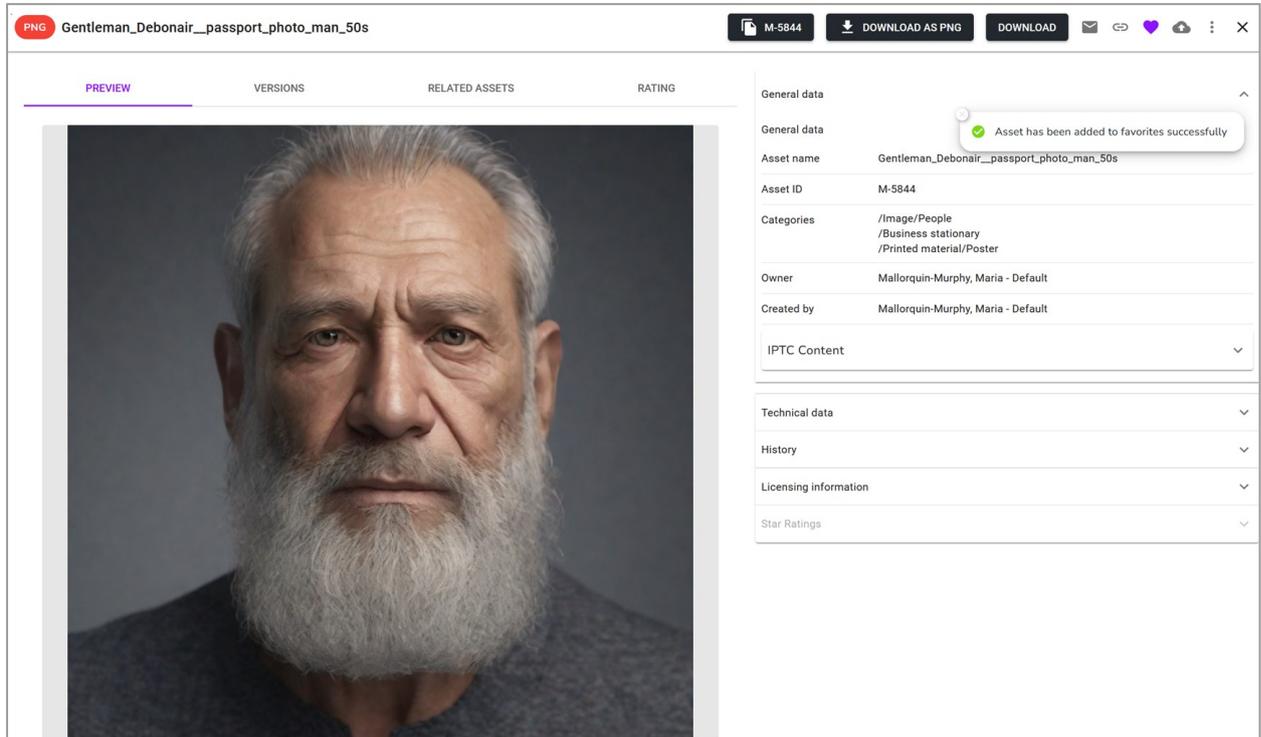
The detail view fills the entire browser window. The preview takes over the majority of the view. Important functions are accessible above the preview: You can click the versions, variants, related assets and ratings of the asset to access them.

The section on the right displays additional tabs with the attributes of the assets.

> **Note**
>
> The tabs and the arrangement of attributes may vary for each system. Therefore, the detailed view of your system may differ from this . If you have any questions, please contact your system administrator.

The title row displays the title and file format. The following functions can be accessed next to it:

- *Button with Asset ID*: This copies the asset ID to the clipboard.

- *Download as ...*: The asset is downloaded in a predefined standard format.

- *Download*: This downloads the asset. When doing so, you can access the various rendering schemes and adapt the asset to your purposes.

- ✉ : This sends the asset by e-mail.

- 🔗 : This copies the URL of the current view (that is, the detailed view that is currently open) to the clipboard.

- ♥ : You can add the asset to your favorites or remove it from your favorites.

- ☁ : This publishes the asset.

- ⋮ : You can access additional functions, for example, for creating a version, rating the asset or subscribing to the asset.

Contents of the ⋮ Menu

You can access a large array of functions via the ⋮ menu on each search result or in the detailed view.

Some functions are only available depending on the context, such as composing messages under *Subscribe > E-mail to subscriber*s . This means that this option only appears in the menu if an asset also has subscribers. See figure on the following page:

📁	Open
🔍	Preview
✏️	Edit Properties
✏️	Change asset's ownership
▧	Variants ⌃
⊕	Assign variants
↻	Automatically fill tags
↺	Recreate Preview Images
🗑	Delete
❤️	Add to my Favorites
📁	To Collection
★	Rate
👁	Subscribe
🔗	Copy asset link
⬇️	Download/E-Mail ⌃
💾	Save
✉️	Send as e-mail
☁️	Publishing Channels
🛒	Create shop item
💼	Create Job
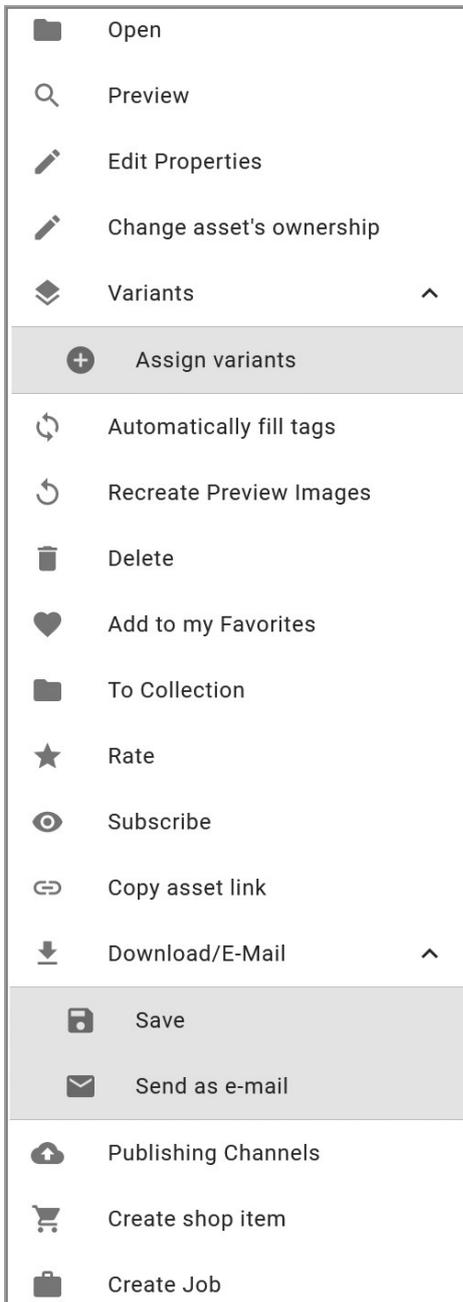
Associated Tasks

- *Finding Online Occurrences* on page 191

- *Versioning an Asset* on page 142

- *Flagging a Version as Official* on page 146

- *Downloading a Version* on page 147

- *Deleting a Version* on page 147

- *Creating a Variant* on page 169

- *Opening a Variant* on page 170

- *Unassigning Variants* on page 171

- *Transferring a Variant* on page 172

Note that you can use the Menu button to access additional functions. You can also access these functions when you open the menu in a search result; they are therefore not listed again here for the sake of clarity.

3.1.3   Dialog Box for Editing the Attributes

The Edit attributes dialog box can be used for a number of different tasks:

- If you want to complete the attributes for assets that you have created, see *Import Area* on page 80

- If you are managing assets and want to edit the attributes, see *Management of the Asset Attributes* on page 132

See also the *Associated Tasks* section below, which refers to other tasks.

Opening the Dialog Box

To edit the attributes, you can access the dialog either via the *Edit Properties* function in the ⁝ menu on the search result or in the detailed view and, in the case of a multiple selection, in the MENU button above the search results, by choosing either *Edit > Edit assets one by one* or *Edit all assets at once*.

Structure

The following screen shot shows the dialog box when you are editing a single asset. A preview image is displayed in the left-hand section, and the editable attributes are displayed in the right-hand section.

> **Note**
>
> Note that the attributes displayed depend on the asset type or whether you are editing one asset or several assets at the same time. If you have any questions, please contact your system administrator.

No.	Function	Description
1	Asset type	The top field shows the asset type defined for the asset. If a description is stored for the asset type, it can be displayed directly in the editing dialog box via the ⓘ icon. Note: You can only change the asset type if your role has the corresponding authorization. If you have any questions, please contact your system administrator.

No.	Function	Description
②	Show excluded attributes	If your role has the appropriate authorization, you will see the *Show excluded attributes* button. Use it to call up the attributes that are not assigned to the asset type. Note that this authorization is usually only assigned to a few users.
③	Collapsed group	Attributes are grouped together for clarity. Initially, the groups are displayed expanded. Collapse groups to get a better overview.
④	Expanded group	When a group is expanded, all assigned attributes are displayed below each other.
⑤	Large preview	The icon ⬚ appears in the center when you move the mouse over the preview. Click it to open the large preview.

The mandatory fields are marked with *. These attributes must be filled in in order to save the attributes. As a rule, further attributes must be edited. If you have any questions, please contact your system administrator.

Note that attributes may be preassigned with a default value. In addition, attributes may be visible and possibly even preset, but still be locked for editing.

If additional information is stored for the attribute, it can be called up via the ℹ️ icon.

For more information on the attributes, see *Asset Attributes* on page 228

Associated Tasks

- *Alternative Preview Image* on page 138

- *Related Assets* on page 174

- *Requesting an Upload Approval* on page 179

- *Flagging Assets as Requiring Approval* on page 182

- *Assigning a License to an Asset* on page 185

- *Linking an Asset to a Watermark* on page 188

3.1.4   Gallery and List View

Assets are occasionally displayed in a list, e.g. a list of search results, your favorites or a collection. You can choose between thumbnail or list view for these assets.

Gallery View

The gallery view is a visual display of assets - very little information about the asset (such as the dimensions or owner, for example) is displayed.

Choose the thumbnail view in order to:

- List assets in a simple visual form,

- Display assets as if they were in a photo gallery,

- Browse through assets easily.
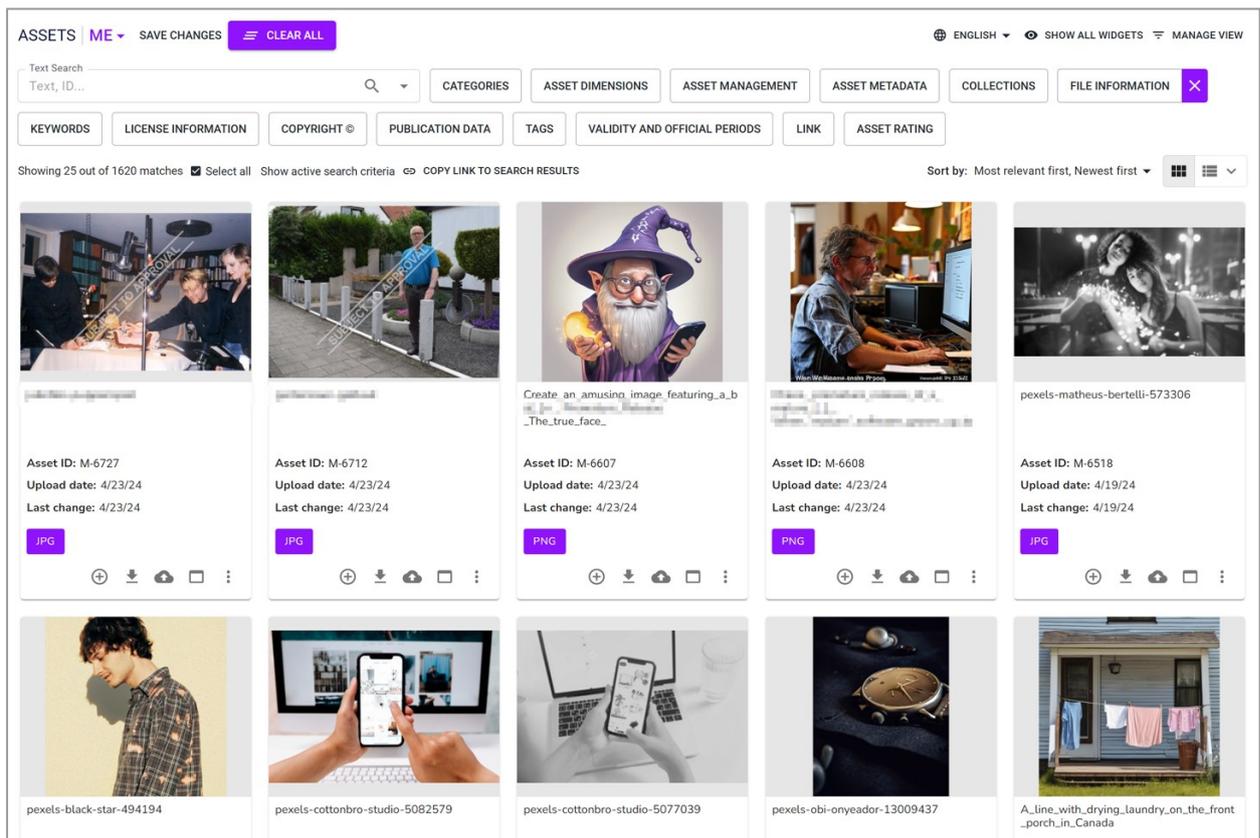
List View

In the list view, additional attributes are displayed next to the preview image of the asset. An administrator can specify which attributes are to be displayed in the list view in order to meet the requirements of your company. If you have any questions, please contact your system administrator.

You can choose between a compact and an extended view. If you choose the compact view, customized fields created as formatted text will not be displayed. To switch between the compact and the expanded list view, click the arrow ⌄ on the list view button in the search results. Select *Expanded list* in the drop-down list.

3.2 Start Page and Search

Navigating to *Assets > Search*, you can access the start page with the *Searching* on page 93. The following sections are displayed when you open the homepage.
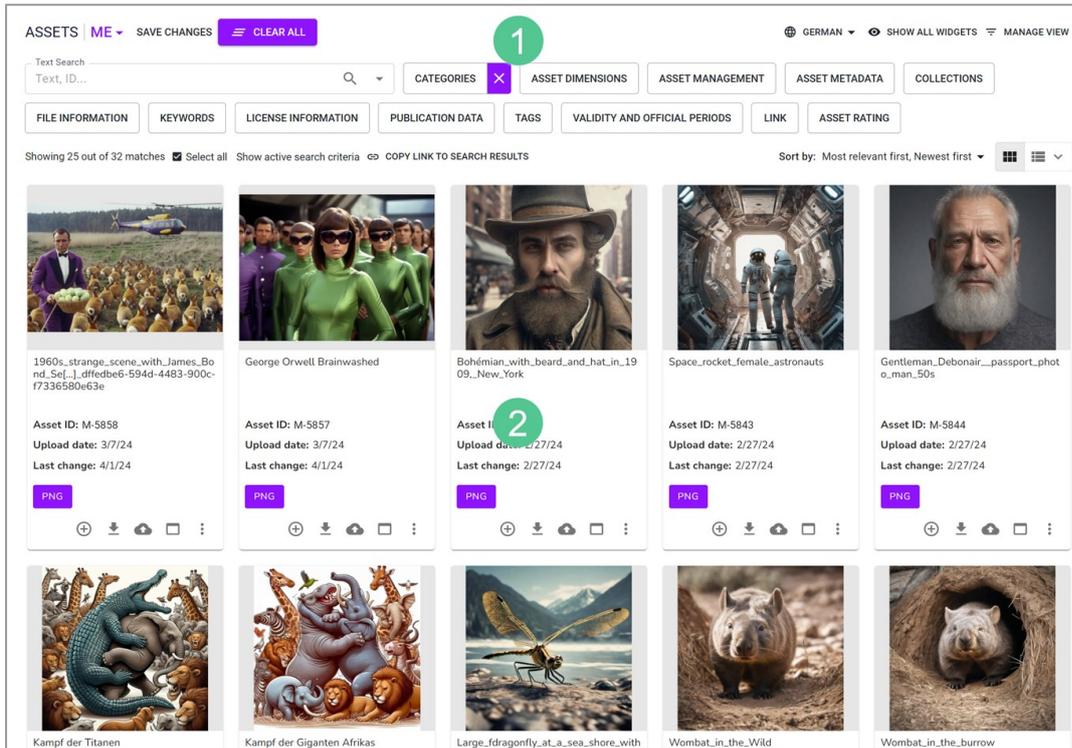
Section	Description
1	Search functions This section is used to perform a new search. It also allows you to access all the search settings and display the search results.
2	Search results This section displays the assets that have been found.

Search Functions

The following functions are available in this section:

Section	Description
1	List of Views: Click the element to open the list of all available views. *My views* are displayed in the top section. *Public views* are displayed in the lower section. Associated task: • *Delete View* on page 119
2	Searched language: You can decide which language to search when asset attributes are available in multiple languages. One such property could be the name of the asset. All the interface languages enabled on your system will be displayed. *Show all widgets*: Select this to display all widgets. *Manage widgets*: Click this button to open the *Edit view* dialog box. Associated tasks: • Change widget display, see *Widgets* on page 97 • *Creating a view* on page 117 • *Editing a View* on page 118 • *Copying a View* on page 119
3	Activated widgets: This section shows the widgets that you have chosen to display under Manage views. If you have entered search criteria in a widget, this is indicated by a color marking.
4	*Select all*: This button is used to select all the assets in the search results, so that they can be sent by email, for example. *Show active search criteria*: Click this button to display a list of all active search criteria. *Copy link to search results*: Click this button to copy the search URL to the clipboard. You can use the usual commands for your operating system to paste the URL and, for example, share it with another user by e-mail. If the user has the relevant authorization, he or she can also perform the search. However, if the user has different access authorizations for assets, the search results may be different.

Section	Description
⑤	*Sort by*: Click this section to open the *Sorting Options* dialog box. Enter up to three sorting criteria and sort the criteria based on which ones should take priority. *Gallery view* and *List view*: Choose between the gallery and list view and select between *Compact list* and *Expanded list*. Default is *Gallery view*.

Menu Functions

To perform any of the tasks listed below, you can access the functions from the ⋮ menu on the asset. If you want to perform a task on multiple assets, such as sending an email with multiple assets attached, select the checkbox for the assets. A $\boxed{\text{MENU...}}$ button will then appear above the search result, allowing you to access all available functions for bulk editing.

Associated Tasks

You can access the following tasks in search results:

- *Save* on page 196
- Sending an asset as e-mail, see *E-Mail Delivery* on page 198
- *Deleting* on page 150
- *Revisions* on page 149
- *Subscribing to an Asset* on page 167
- *Flagging an Asset as a Favorite* on page 156
- *Rating an Asset* on page 165
- *Deleting a Rating* on page 165
- *Assigning an Asset to a Collection* on page 159
- *Assigning Several Assets to a Collection* on page 160
- *Creating a Variant* on page 169
- *Creating an Item* on page 221
- *Publishing an Asset Immediately* on page 216
- *Scheduling the Publication of an Asset* on page 216
- *Editing the Publication of an Asset* on page 217

3.3 Import Page

By navigating to > *Assets* > *Import* you can access the following functions :

- You can create assets (see *Create* on page 63).
- You can version multiple assets at once (see *Versions* on page 140).
- You can check assets for a digital watermark (*Watermarks* on page 187).

For the first two functions, you have to upload the assets to the module. You can do this by using the *Import* page or you can drag and drop local files into the search window. The upload interface and operation are described in *Start Uploading* below.

Press *To Import* to go directly from the import dialog to your last import. The files will be displayed in an import folder following the upload. In the Import overview page you can access all import folders, see *Imported Files* on page 52. See *Import Overview Page* on page 53 to learn how an import folder is structured and what functions are available there.

Select > *Assets* > *Import* > *Check for Digital Watermark* and check local files for a digital watermark.

3.3.1 Start Uploading

You can access the upload functions by selecting the following:

- > *Assets* > *Import* > *Import*: The import dialog opens. Enter a new name for the import folder or select the name of an existing import folder that you have already created. Once you have started the upload, you can exit the dialog via the *To Import* or *Close* button as soon as they become active. This means you do not have to wait for the upload to be completed.

The following interface is displayed when you start an upload:

Import

Folder Name *

Movers & Shakers

Drag and drop files here or click Browse to add files to the queue.

📁 BROWSE

QUEUE	FAILED	DONE

No results found!

Drag and drop files here or click

Browse to add files to the queue.

≡ CLEAR QUEUE   ▶ START

CLOSE   TO IMPORT

Once you have added a file or multiple files, they will be displayed in a list view:
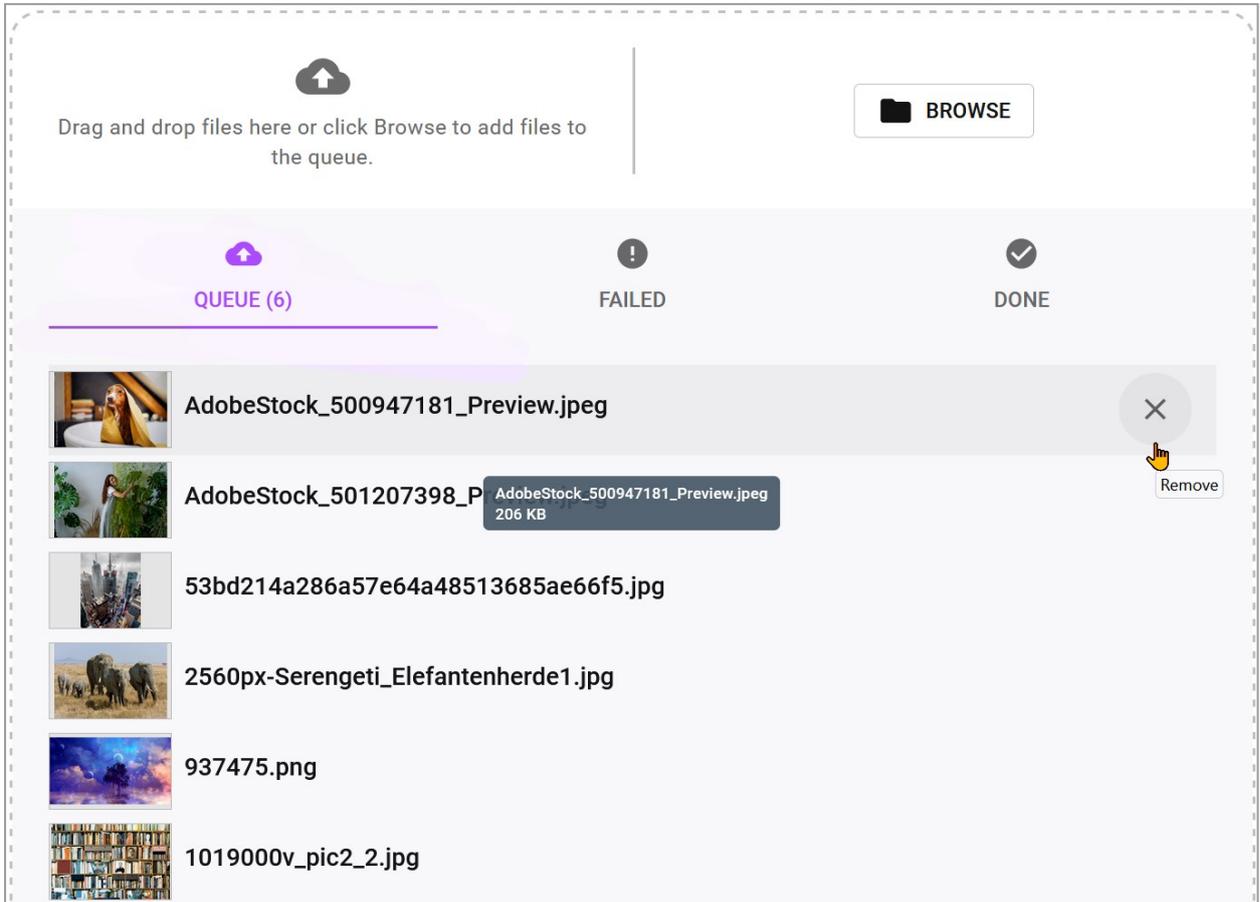
Click on *Start* to start a new upload, which is executed in the background.You can also add files after the upload has started. The files are uploaded one after the other when you start the upload. A progress bar provides information about the status of each file.

- When the upload is advanced enough, the *To Import* button becomes active. Click it to go to your import folder. There you can complete the attributes of the uploaded assets.

- When you prefer to edit the asset attributes later, finish the import dialog by clicking *Close*.
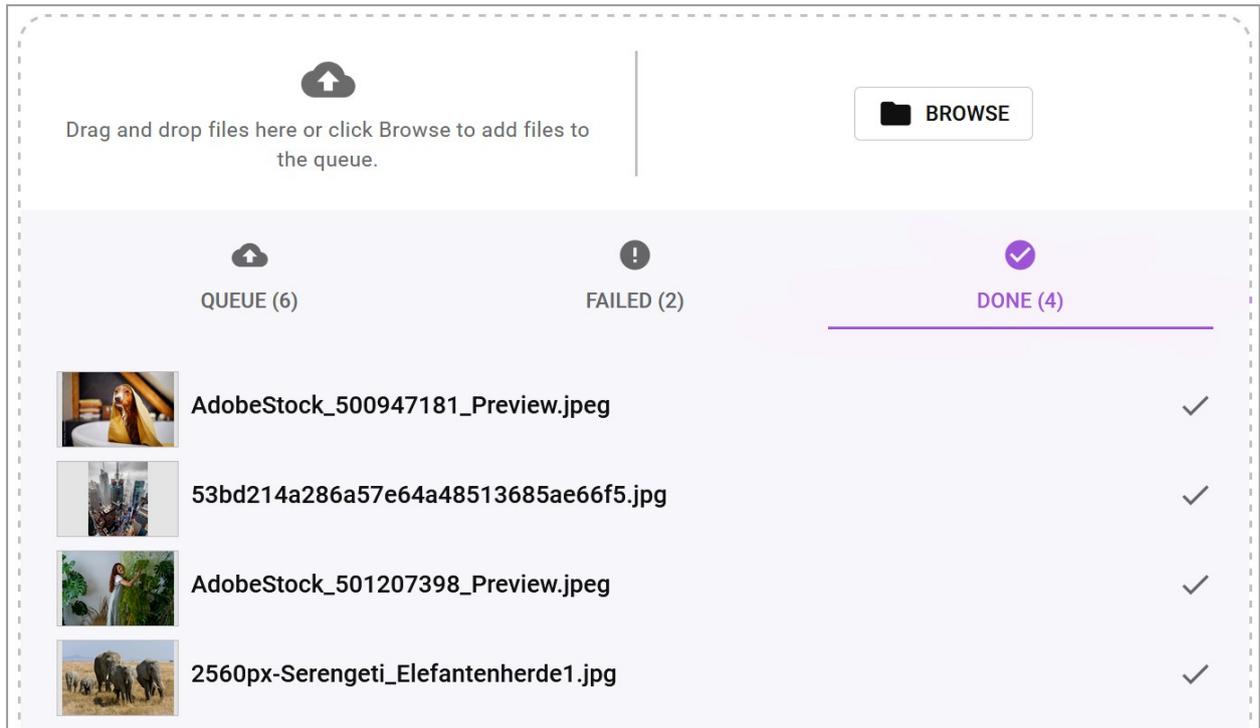
Click on *Done* and *Failed* tabs, to check if the upload is complete and to check the reason for possible failures. A detailed log is available on the import page.

User Interface Elements

Element	Description
Folder Name	Note: Editable only before the start of an upload. Enter a name for the import folder. Folders that you have created in the past are displayed in a selection list after clicking on the text field. They can then be reused.
Browse	Add additional files to the upload. Adding is possible even with a started upload.
Start	Note: Only visible before the start of an upload. You start the upload.
Pause/ Resume	Pause the upload or resume it.
×	If you click × in the file name section, you delete the corresponding file from the import dialog. If you click the *Clear Queue* button, you delete all files from the upload queue.

Element	Description
To Import	Note: Only visible after a certain upload progress. This opens the dialog box for editing the asset attributes. For more information, see *Completing the Attributes of an Asset* on page 82.
Close	Exits the import dialog immediately. You do not want to edit the asset properties of the import at this point, as you can always modify these details later.

Associated Tasks

3.3.2 Imported Files

You access the overview of import folders by selecting > *Assets* > *Import*. You can view your own import folders and, if you have the appropriate authorization, the import folders of other users.

Display and Structure of Import

When you access the Import Overview, you are in Gallery mode. The list view shows the name of the import folder, the owner, the date of the import, the total number of imported files (*Uploads*), and the number of unprocessed files *Unedited*). The individual upload files or import folders are marked with a colored circle to indicate the status of the import.

Color	Description
▬	The import is not edited yet.
▬	The import has been fully completed and edited.
▬	The import is only partially edited.
▬	The import is empty or contains duplicates only - that is, assets that already exist in the *Media Pool* module.

Associated Tasks

- *Transferring an Import Folder* on page 78
- *Deleting an Import Folder* on page 79

3.3.3 Import Overview Page

The *Import* page contains the files imported during the upload and their extracted data and preview images in their respective import folders. Your most recent import is displayed at the top and is already open. In the import folder, you complete the asset attributes and thus make new assets in the *Media Pool* module or you create all files contained in the folder as versions of already created assets. If duplicates are detected during the upload, you identify them in the *Failed* tab of the import dialog or track them later in the log section of the import folder. Please refer to Import Area for a comprehensive overview of the available functions.

Structure
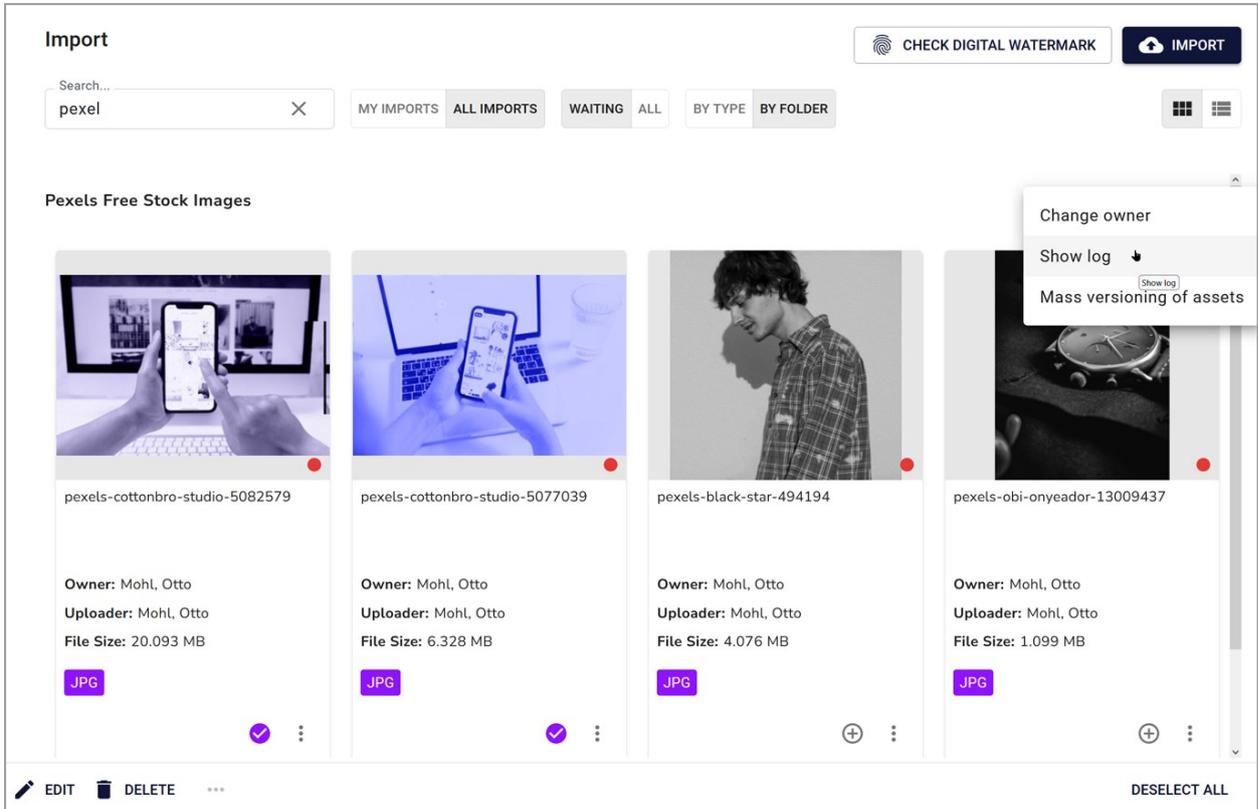
The assets contained in the import are initially displayed in a gallery view. You can switch to the list view. The log area is located under the button ⋮ *More functions*. If problems occur during import, these are recorded in detail and displayed in the log.

The import overview provides you with details about the import folder. You can see the folder's name, who owns it, who uploaded it, and the size of the files inside. You'll also be able to monitor the progress of processing. To make things even clearer, there's a colored circle that indicates the status of the folder or each file.

The editing functions are displayed in the toolbar appearing under a multiple selection and in the ⋮ menu for each individual imported asset. You use them to complete the asset attributes and then make the file available as an asset in the *Media Pool* module.

The following list covers the most common uses and post-import operations, starting with the default scenario and moving through various filtering options and methods for selecting assets.

Processing Your Last Import

This is the most common use case, which is why your last import is always at the top. The basic steps for opening the import are:

Click > *Media* > *Import*or click the *To Import* button in the file import dialog directly after an upload has finished.

Selecting a Previous Import Folder

This is a useful option for regularly recurring imports under the same name. Enter the name or substring of an existing import folder in the *Folder Name* field in the import dialog. Only import folders that you have created previously will be listed as results. Select the desired import folder to continue uploading to that folder.

Using Filters

It is standard that only imports that have not yet been processed are displayed. The *Waiting* filter is therefore preset when opening the imports overview. If you are currently in a different filtered view, clicking the *Waiting* filter allows you to only select assets that have not yet been edited. Depending on your user permissions, you can also access and edit imports from other users by activating the *All Imports* filter.

> **Note**
>
> You can use the search field and the filters in the toolbar to narrow down your search. The search function only looks for import folder names, not file names.

Select a Range

The SHIFT -click selection from Asset A to Asset B is useful for selecting a larger number of related assets. See Completing the Attributes of Several Assets at Once and Completing the Attributes of Multiple Assets One by One.

Mark and Select Individual Assets

As an alternative to the area selection for non-contiguous assets, you can select several assets individually or click on individual assets after the area selection and remove them from the selection.

Either click on the assets you want to select one after the other, or directly click on the + icon at the bottom of each asset tile. This allows you to select multiple assets without having to select an entire area. Note: The multiple selection also works across several import folders after you have expanded them by clicking on their name.

The assets you have selected are marked with a ✓ checkbox.

Click the pencil icon with the *Edit* button in the footer of the window and select a function.

See Completing the Attributes of Several Assets at Once and Completing the Attributes of Multiple Assets One by One.

> **Note**
>
> When browsing imports, assets can be selected for further editing by clicking on their preview images. In most cases, this is easier than clicking individually on the small + symbol at the bottom of each asset tile.

Associated Tasks

- *Completing the Attributes of an Asset* on page 82

- *Completing the Attributes of Several Assets at Once* on page 85

- *Completing the Attributes of Multiple Assets One by One* on page 83

- *Versioning Several Assets Simultaneously* on page 143

- *Deleting an Asset in the Import Folder* on page 87

3.4 Collections

Select > *Usage* > *Collections* to access your favorites and collections.

Favorites

You can access assets that you mark as favorites quickly by choosing > *Assets* > *Collections* > *My Favorites*. The assets are displayed in a hit list here.
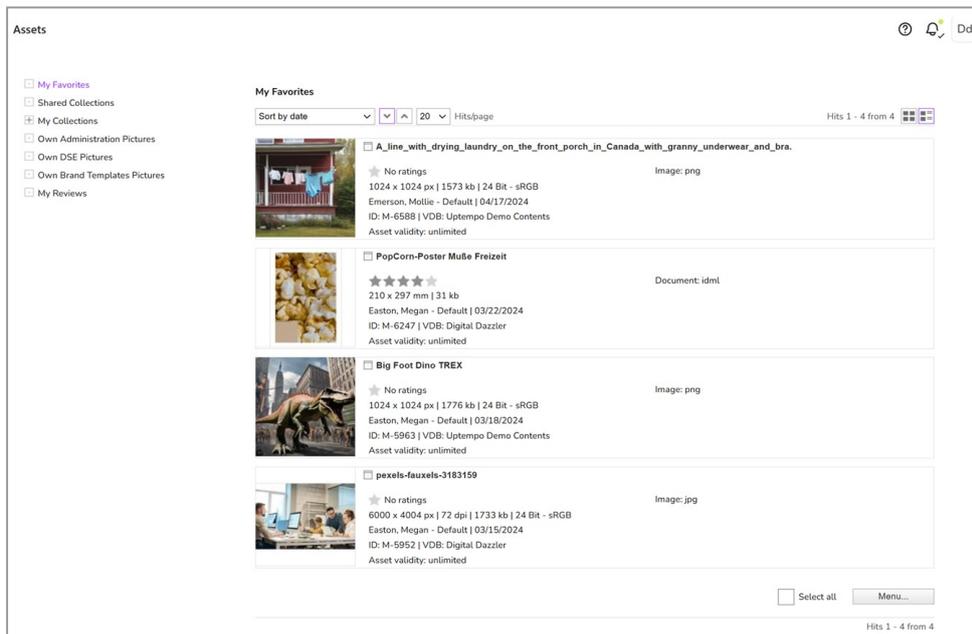
Collections

You can group various assets in a collection and make the collection available to other users. An example of this would be a collection of images for a campaign. The assets are displayed in a hit list in a collection.
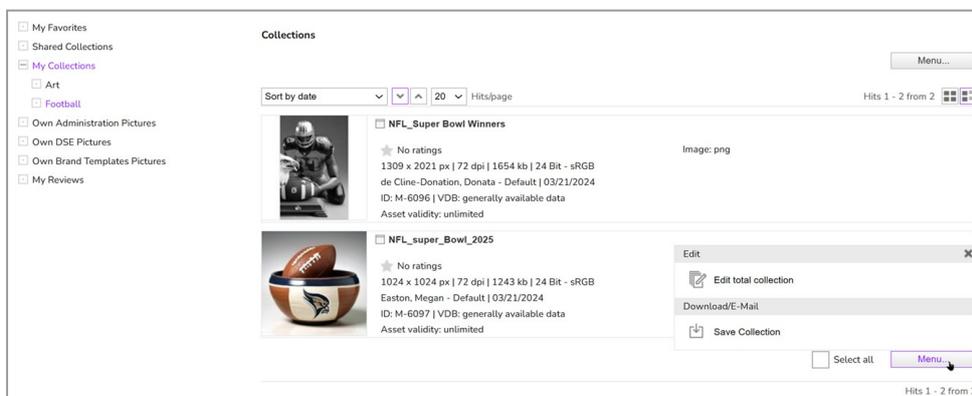
For more information, see *Collections* on page 157.

Associated Tasks

3.5 Approvals

You can access information about applications for download and upload approval by selecting > *Assets > Approvals*.

Download Approval

You can flag assets as requiring approval to allow specific persons to access or use them or to prevent their access or use by specific persons, for example. Users must request permission to download or send assets that require approval from the owner. Once a user has received a download approval, the validity of the approval is unlimited and without restriction: The user can use the asset and all of its versions repeatedly.

You can call an overview of the download approvals by choosing > *Assets > Approvals > Download approvals*.

Function	Display
To Be Processed	All assets for which you must still grant an approval.
Still Pending	All assets that you have requested approval to use.
History > Received Approvals	All assets that you have received approval to use.
History > Received Rejections	All assets that you have not received approval to use.
History > Granted Approvals	All assets that you have granted approval to use.
History > Rejected Approvals	All assets that you have rejected approval to use.

Upload Approval

To ensure that only high-quality assets are created, virtual databases (VDBs) with upload approval can be created. In this case, the assets are created in the VDB only if the assets have run through an appropriate approval workflow and been approved.

Select *Assets > Approvals > Upload Approval*s to display an overview of upload approvals.

Function	Display
To Be Processed	All assets for which you must still grant an upload approval.
Still Pending	All assets that you have imported to a VDB that requires approval that have not been approved yet.

Function	Display
History > Received Approvals	All assets that you have imported to a VDB that requires approval that have been approved.
History > Received Rejections	All assets that you have imported to a VDB that requires approval, but for which the upload approval has been rejected.
History > Granted Approvals	All assets for which you have granted an upload approval.
History > Rejected Approvals	All assets for which you have rejected an upload approval.

Associated Tasks

- *Processing a Request for Download Approval* on page 184

- *Processing Approval Requests* on page 180

- *Viewing the Processing Status of an Upload Approval* on page 180

3.6 Reports

If you click > *Assets* > *Reports*, you can access the standard dashboard in the Reporting Center module. Note that you must have a role with the appropriate permissions in the *Reporting Center* module to access the standard dashboard.

For more information about the default dashboard, see the appropriate documentation.

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Create

4

As the person responsible for DAM, Ron has to deal with a variety of tasks. These include versioning graphics and logos during the design process and being responsible for importing imagery from photo shoots for new ad campaigns.

In order to be able to manage your digital files in the *Media Pool* module, you must create the files in the module as assets. You create an asset in the following steps:
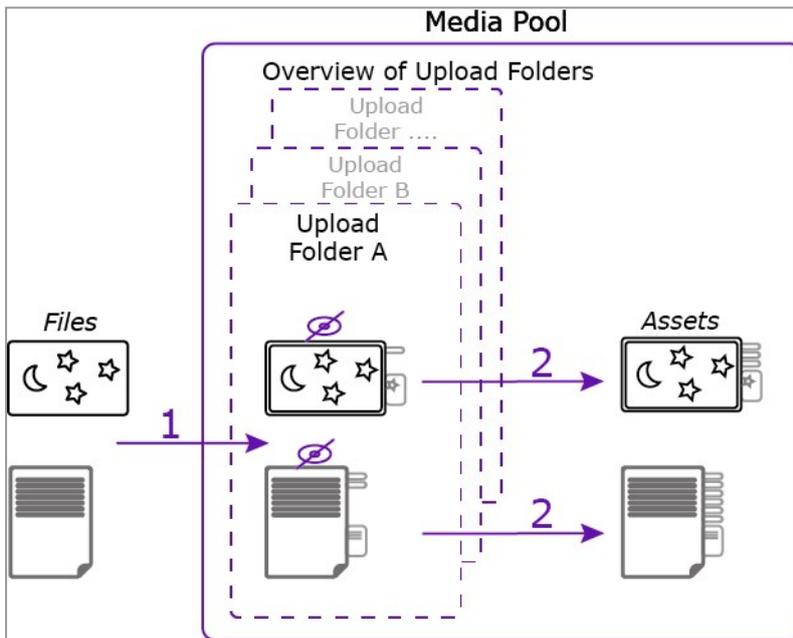
1. You upload the one or more files.

   The uploaded files are stored in an import folder. You can access all import folders from an overview page. Files that are located in an import folder whose asset attributes have not yet been completed are not accessible in the module.

2. In the import folder you complete the asset attributes.

Subsequently, the asset can be accessed in the *Media Pool* module by other users.

Upload

When you upload one or more files to the import folder, meta data for the files is extracted and copied to the asset attributes and preview images are generated. For more information, see *The Upload Process* on page 66.

Import Overview

The import folders are displayed on an overview page. You can view your own imports and, if you have the appropriate permissions, the import folders of other users. For more information, see Overview of the Import Folders.

Import Folder

An import folder contains the files imported during upload and their extracted data and preview images. It is possible to use the same folder for multiple consecutive uploads. In the Import folder, you select the asset type and then fill in the asset attributes. If duplicates were detected during the upload, you can track them in the log section of each import folder. For more information, see Import Area.

4.1 The Upload Process

When uploading, one or more files are loaded into the Import folder. The metadata of the files is extracted and copied to the asset attributes. Preview images (thumbnails) are also generated.
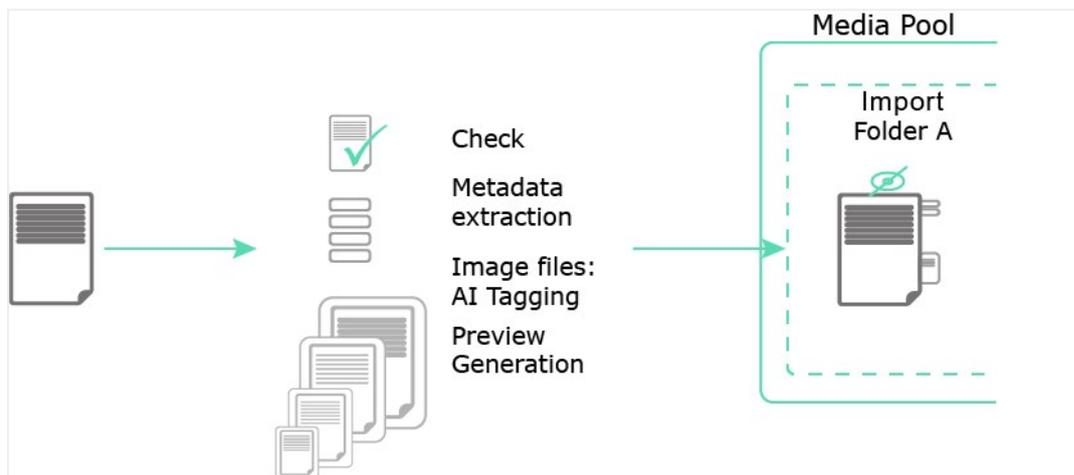
Prerequisite

The file format for the file that you want to import must be created. Other formats cannot be added to the upload. Which file formats are permitted is customized and adapted to the formats used in your company.

Process

During the upload, the following will be checked:

- Duplicates: During the upload, the file content is checked for duplicates using a bit-by-bit check and unique cryptographic MD5 checksum verification. This ensures that even identical files with different names are reliably detected as duplicates. A message is displayed if a file has already been created as an asset. When you upload several files, any duplicates found are skipped and the upload process is continued.

- Linked images: When you upload an InDesign file with linked images, the module checks whether the images are available. It also checks whether any duplicates of the linked images already exist in the module.

- Valid fonts: If the *Font check* function is activated and configured, the module checks whether the fonts included in an InDesign file upload are valid.

Errors that occur during the upload can be displayed via the menu command *Show log* in the log area of the respective import folder. See Import Area.

- File metadata is extracted and will be set as asset attributes. This applies, for example, to the file type, dimensions, or resolution of the file. The file name is transferred as the title for the asset.

To display an asset in the module *Media Pool*, thumbnails in different sizes are generated. The thumbnails represent the asset in search results or in the asset detailed view, for example.

> **Note**
>
> Thumbnails are used to give users a visual preview of an image or asset before they click or zoom in on the actual image. Thumbnails are created automatically to ensure that they can be displayed in different sizes and qualities on different devices and platforms.
>
> The automatic conversion will resize the image to a specific size, converts it to the RGB color space (the color space used by most displays), and reduces the resolution of the image to reduce file size and load time. It is important to note that preview images are not exact copies of the original images, but compressed and customized versions.

> **Note**
>
> Metadata is extracted and thumbnails are automatically generated only for the supported *Media Pool* file types. If you have any questions, please contact your system administrator.

Several files are uploaded one after the other. You can use the *Pause* button to stop and *Resume* to continue the import.

AI Tagging

It is possible that AI tagging for image files is available on your system. This is a paid service. If enabled, images are analyzed and any elements which are found are stored as tags in the attributes of the asset. Even Adobe PSD files can also be automatically tagged by analyzing their large preview. The tags that were automatically generated by AI can be viewed and individually deleted when editing the properties under *AI Tagging*. Users can thus eliminate those tags that are not a good match for the asset. It is possible to change the language of the tags. The default is the system language set for the user.

You can see *Edit Properties* the generated AI tags in the asset properties. Some fine tuning is usually required. Adjust the tags by deleting unwanted or incorrect tags by clicking the close button in a tag.
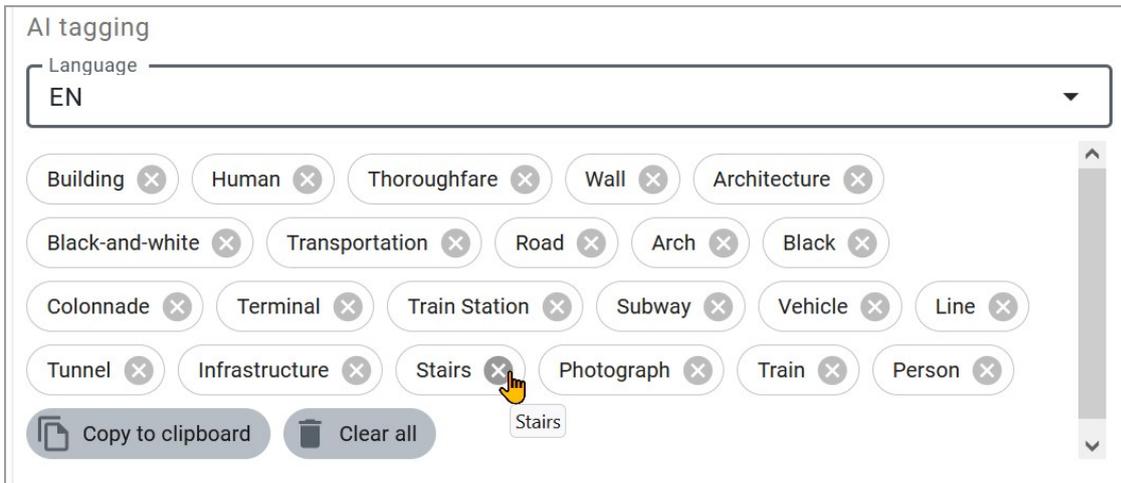
The automatic tags can be included in the search, see *Widgets* on page 97. If you have any questions, please contact Uptempo.

Import Functions

Depending on personal preference and user experience, the import dialog can be invoked in two ways:

- Click > *Assets* > *Import* and then click the button *Import* to open the *Import* dialog. In the *Import* dialog, use the *Browse* button or drag and drop to add files to upload.

- Drag local files into the *Import* overview page or into the *Search* window of the module *Media Pool*.

The *Import* dialog box displays the added files.

Click on *Start* to launch a new upload, which is executed in the background. You can exit the import dialog as soon buttons at the bottom of the dialog become active. Click *Close* or *To Import* to exit the import dialog without having to wait for the upload to finish.

Associated Tasks

- *Uploading Files* on the next page

File Size

With each upload you can upload files with a size of up to 10 GB to the module *Media Pool*.

> **Note**
>
> Please note that there must be sufficient storage space on your server to process the file. The storage space required for the file may exceed the available storage space.

The memory required for a file is calculated based on the following formula:
Width (px) x height (px) x color depth (bit)/ 8 x color channels= RAM in bytes

Example:

- Image with 640 px × 480 px, 16 bit color depth, CMYK:
  640 × 480 × 16/8 × 4 = 2457000 bytes = 2.3 MB

- Image with 25000 px × 25000 px, 16 bit color depth, CMYK:
  25000 × 25000 × 16/8 × 4 = 5000000000 bytes = 4.7 GB

Which Files are Included in an Upload?

To make it as efficient as possible to create assets, we recommend using the following rules as a basis when including files in uploads:

Assets with identical mandatory properties:

- Editing the asset properties manually may be very time-consuming. If you want to edit the attributes of several assets at the same time, combine them in one upload. To do so, the following mandatory attributes must be identical:
  - Asset type
  - Virtual DB, which means the set of users for which the asset is visible.

- at least one category
- Mandatory attributes of the asset type

- These attributes must be edited to access the asset in the module. The other attributes may differ and can then be edited separately for each asset. For more information, see *Completing the Attributes of Several Assets at Once* on page 85.

- Versions of existing assets: You can version assets. If you want to version multiple assets at the same time, use the *mass versioning* function. For more information, see *Versions* on page 140.

Duration of Uploads

The length of time required for the import depends on the file size, your broadband and the processing time required (for extracting meta data, for example). Importing very large files (for example, 500 MB or more) can therefore require a very large number of system resources under certain circumstances and may lead to errors or terminations. In the case of large image files in particular (for example, non-compressed TIFF files), we recommend checking whether the file size can be reduced or whether it is actually necessary to store the source file in the module *Media Pool*.

Progress Bars

Once you start the import, the upload progress for each file is displayed. A status bar for the overall import is displayed below the list.

Tips for Selecting Asset Types

- Choose the right asset type to ensure all relevant information is entered.
- You can use suggestions, but you may need to adjust the pre-filled fields.
- If you're unsure, ask. If you don't know which asset type to use, contact your administrator or experienced colleagues.
- Be thorough. Fill in as many fields as you can. This makes the asset easier to find and use.

4.1.1 Uploading Files

You can upload files to the Media Pool in different ways.

Upload as Basic User

1. Click > *Assets* > *Import*.

    The import overview page will be loaded.

2. Click the *Import* button at the top right.

3.

    The import dialog is displayed.
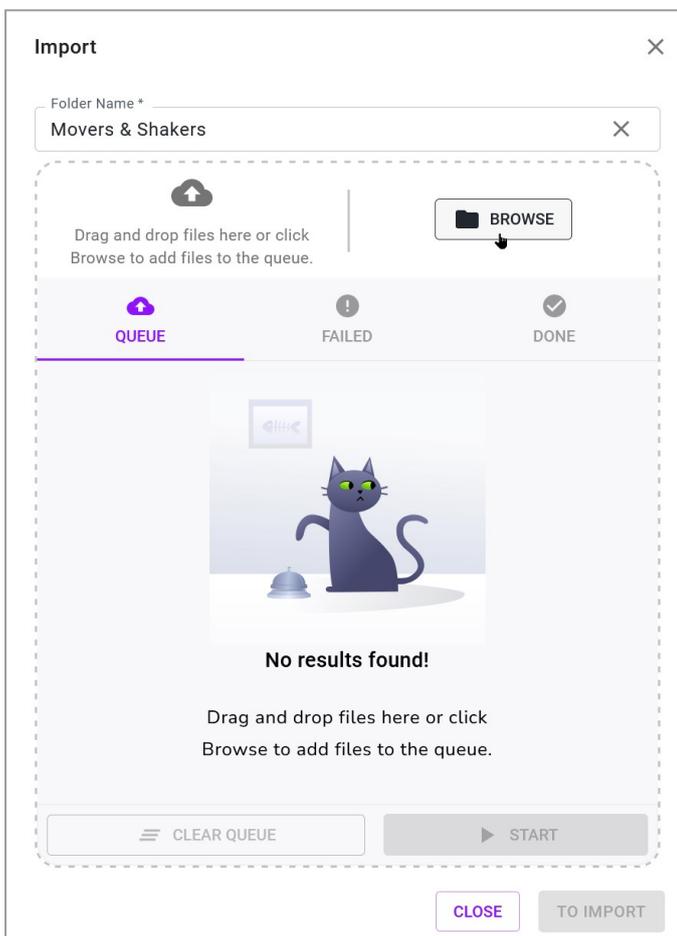
4. Enter a name for the import folder in the *Folder Name* field.

5. Select one of the following options:

    a. Add local files to the import dialog using drag-and-drop.

    b. Click *Browse* and select local files.

For PNG, JPEG, BMP or GIF files a small thumbnail is displayed directly after adding them to the queue.

c. To remove accidentally placed individual files from the queue, click ✕ after the file name. To remove all files from the queue, the *Clear Queue* button is available.

6. Click *Start*.

   The files are uploaded.

7. Once the upload is completed, click *To Import*.

   This opens the import folder.

8. Optional: Click *Close* to exit the import dialog. You can edit the required attributes later.

You have uploaded one or more files. In the import folder, select the uploaded assets and switch to the dialog for editing the asset attributes. See Completing the Attributes of an Asset or Completing the Attributes of Multiple Assets One by One.

Upload as Advanced User

The newly introduced drag-and-drop feature streamlines the import process: Imports can now be started directly from the relevant areas of the *Media Pool*, without having to go to the Import page first.

1. You can drag and drop files from a local storage medium directly into the import overview or into the *Search* of the *Media Pool* module without having to click the *Import* button first.

   This will save you steps 1 and 2 of the standard instructions above.

The *Import* dialog is displayed.
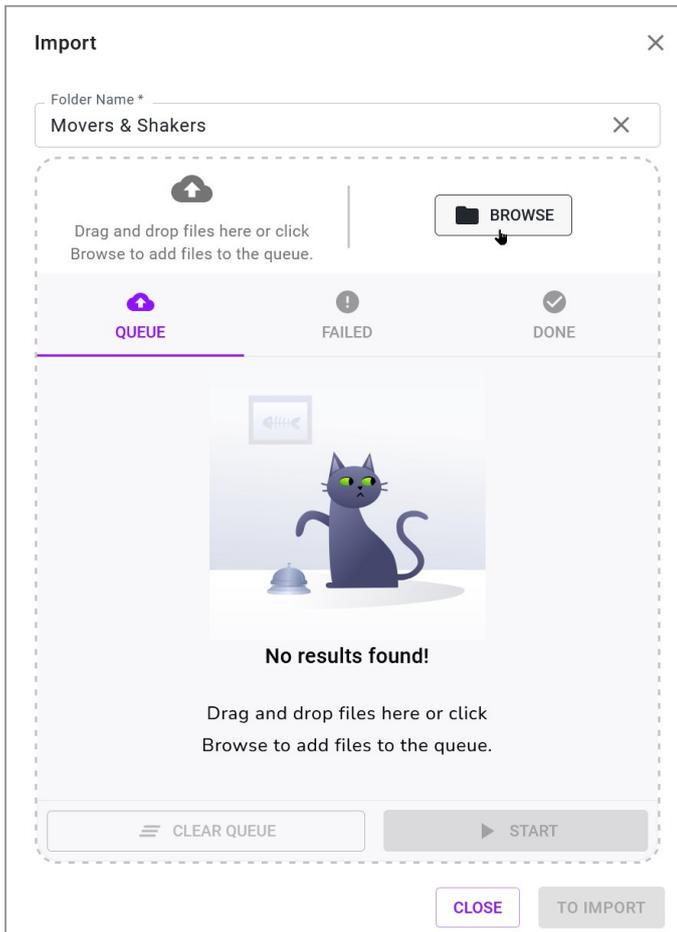
2. In the *Folder Name* field, type a name for the new import folder.

   You can reuse an existing folder name to add additional uploads to that folder.

3. Import folders previously created by you are displayed in a drop-down list by clicking on the *Folder Name* field.

   You can search for folder names you've already used.

4. Select one of the following options:

   a. Add local files to the import dialog using drag-and-drop.

   b. Click *Browse* and select local files.

      For PNG, JPEG, BMP or GIF files a small thumbnail is displayed directly after adding them

to the queue.

    c. To remove accidentally placed individual files from the queue, click ✕ after the file name. To remove all files from the queue, the *Clear Queue* button is available.

5. Click *Start*.

6. Optional: The files are uploaded.You can add further files to the import dialog during the upload. To do this, proceed as follows: Repeat step 4a. The additional files are added to the end of the queue. You do not need to restart the upload for these new files.

7. Once the upload is completed, click *To Import*.

   This opens the import folder.

8. Optional: Click *Close* to exit the import dialog. You can edit the required attributes later.

9. Optional: While the upload is running, you can add more files to the Import dialog box. To do this, do the following: Repeat step 4a. The additional files are added to the end of the queue. You do not need to restart the upload for these new files.

10. Once the upload is completed, click *To Import*.

    This opens the import folder on a separate page.

11. Optional: If you prefer to edit the required attributes later, click *Close* to close the import dialog.

You have uploaded one or more files. In the *Import* folder, select the uploaded assets and switch to the dialog for editing the asset attributes. See Completing the Attributes of an Asset or Completing the Attributes of Multiple Assets One by One.

Upload Problems

Before switching to the *Import*, you can already find out why the upload was unsuccessful for some assets on the *Failed* tab. The number in parentheses indicates the total number of failed file uploads.

1. If the upload is incomplete, in the import dialog, open the *Failed* tab in the import dialog.

2. Move the mouse pointer over the exclamation mark in the red circle next to the file name.

   In the tooltip you will find an initial short error description such as "The asset already exists. You cannot upload it twice."

3. For advanced users: You can view the detailed report (log) after failed uploads in the most recent import folder under the button ⠆ *More functions > Show log* or for older import folders under *... > Show log*.

Show Log

In the *Import* folder, you can display a log on the missing or incomplete Assets after upload errors. You can access the log only after failed uploads or versioning.

- After a partially successful upload and clicking *To Import* the command *Show log* is available under the ⋮ *More functions* menu button on the top of the *Import* page.

- When an upload fails completely, the only way to get to the empty import folder is via > *Assets* > *Import*. Then set the filter in the *Import* toolbar from *Waiting* to *All* to display the empty import folder. You can access the log to the right of the folder name row via > *...* > *Show log*.

The log lists the problems that occurred during the import process, for example:

- The detection of a file that is a duplicate of an existing asset. The detailed views of the corresponding assets already in the module *Media Pool* are linked. If you have the relevant authorization, you can open the detailed view of each relevant asset directly.

- The import of a document with invalid fonts (when the font check is activated)

- Missing linked images in InDesign file uploads

- The detection of linked images that are duplicates of existing assets

---

Log   ✕

The asset **University.jpg** already exists.
Created by **Matthias Eckardt (Business Unit 1)**
Owner **Matthias Eckardt (Business Unit 1)**
Date: **09/08/2023**
ID: **M-2349** as file **University.jpg**, Name **UptempoUniversity1975**, VDB
generally available data
Show details

                                                              CLOSE
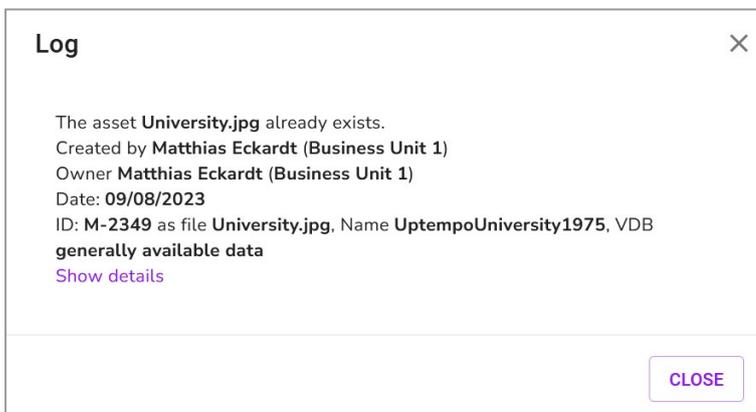
In the case of duplicates that have not been uploaded, you can jump directly from the log window to the detailed view of the existing asset by clicking on the link that appears.

4.2 Overview of the Import Folders

All asset imports and folders are displayed on an overview page by navigating to > *Assets* > *Import*. You can view your own import folders and, if you have the appropriate authorization, those of other users. Each import folder contains the files of an upload or the extracted files of a uploaded ZIP file. Your most recent import is always displayed at the top and already expanded.

Display and Structure

You can access the overview of import folders under > *Assets* > *Import*. You can control which imports are displayed using filters in the toolbar. In gallery mode, you only see the editing status of the individual asset. To access the multi-colored status display for import folders as shown in the illustration, switch the import overview from gallery mode to list view.

For a detailed description of the structure and the multicolored status display, see *Imported Files* on page 52.

Functions and Filters

You can call the following functions and filters on the *Import* overview page:

Function	Description
Opening an import folder	To open an import folder, click the import folder name in the overview.

Function	Description
Transferring an import folder	Click the ... menu on the import folder. You fully handover responsibility the import folder to a different user with the *Change owner* menu option. When an import folder is handed over, it is removed from your overview. The user to whom you hand over one or more import folders is informed by system message. For further information see *Transferring an Import Folder* on the next page.
Deleting an import folder	Click the ... menu on the import folder. With the *Delete folder* menu option you delete the import folder. The files contained in the import folder are also deleted. You can only delete import folders that are not edited yet or are empty. For further information see *Deleting an Import Folder* on page 79.
Check digital watermark	Use this button to test files for digital watermarks. See Checking assets for a digital watermark.
Import button	Use this button to open a new import dialog for uploading files.
Filter	
Show own imports	This is the default view. To view only your imports, click the filter *My Imports* in the toolbar.
Show other imports	If your role is permitted to also display the imports of other users, click the filter *All Imports* in the toolbar.
Show pending imports	This is the default view. Click the filter *Waiting* in the toolbar to display only the imports to be edited.
Show completed imports	Click the filter *All* in the toolbar to display the imports that have already been completed and processed as assets.
Group by Type	When you click the *By Type* filter in the toolbar, the display switches from a folder view to a grouping by file type, such as *Archive*, *Audio*, *Document*, *Image* or *Text*. Click the name of the type in the overview pane to view the contents.
Group by folder	This is the default view. When you click the *By Folder* filter in the toolbar, the view changes from the Type view back to the Folder view.

Function	Description
View	
List view	Click on the button to switch to the list view of the import folders. A date filter *From/To* is available in the list view to narrow down the imports by date range.
Gallery view	This is the default view. Click the button to switch from the list view to the gallery view. Your last import will be opened and displayed at the top of the gallery view.

Associated Tasks

- *Transferring an Import Folder* below

- *Deleting an Import Folder* on the facing page

4.2.1 Transferring an Import Folder

To better distribute the workload, you can change the owner of the import. You fully hand over owner-ship and responsibility for the import folder to a different user. When an import folder is handed over, it is removed from your import overview *My Imports*. The user to whom you hand over the import folder is informed by a system message.

Change Owner of Import Folder

1. Click > *Assets* > *Import*.

2. In the row for the upload that you want to transfer, click the command ... > *Change owner* to change the ownership of the import folder.

   A dialog box opens.

3. Use one of the following options to search for a user:

   ○ In the *Select owner* field, enter the last or first name of the user. You must enter at least three letters to start searching and filtering.

   ○ Enter the e-mail address of the user or at least parts of it in the *Select owner* field to start searching and filtering.

   The search results are displayed as drop-down list.

4. Select a name from the drop-down list.

5. Click *Save*.

You have changed the ownership of the import folder to the selected user.

4.2.2   Deleting an Import Folder

You delete an import folder. The files contained in the import folder are also deleted in the process. However, you can only delete import folders that have not yet been processed and those that are empty.

> **Risk of data loss!**
>
> The deletion of uploaded but unprocessed assets and entire import folders cannot be undone!

Deleting an Import Folder

1. Click > *Assets* > *Import*.

2. In the row for the import folder that you want to delete, click ... > *Delete folder*.

   The *Delete folder* confirmation dialog opens.

3. Click *Delete*.

The import folder and the files that it contains are deleted.

> **Note**
>
> As soon as you have completed asset attributes for an asset in the import folder, an error message is displayed when you invoke ... > *Delete folder*. If you exit or reload the *Import* area, the menu option *Delete folder* for this import folder will no longer be displayed the next time.

4.3 Import Area

The *Import* area is where you make uploaded files available as finished assets in the module *Media Pool*. Newly added files are initially placed in a waiting area after the upload and must be completed with mandatory attributes such as asset name, VDB etc. before they can be used for further functions such as search, distribution in collections, etc.

Your most recent import folder is located at the top of the page and is already open. If duplicates were detected during the upload, you can track them in detail in the import folder *Log* window with a link to the duplicate assets in the system.

Structure

For a detailed description of the user interface, see Import Interface.

Make Assets Accessible in Media Pool

There are two ways to get to the import area:

- When an upload is ready for processing, the *To Import* button appears in the import dialog. Click it to go directly to the uploaded files.

- You can reach the page by navigating to > *Assets* > *Import*.

  There you will find an overview of all import folders and you can access any specific folder.

In the Import folder, you complete the attributes of the assets or assign them as versions to already existing assets. :

- Completing the attributes of one asset: If the import folder contains only one asset or if you want to make only one asset from an import available. For more information, see *Completing the Attributes of an Asset* on page 82.

- Completing the attributes of multiple assets one after the other: If you want to make multiple assets available but the asset attributes are different. For more information, see *Completing the Attributes of Multiple Assets One by One* on page 83.

- Completing the attributes of several assets simultaneously: If you want to make several assets accessible and the asset attributes are identical at least in the mandatory attributes. For more information, see *Completing the Attributes of Several Assets at Once* on page 85.

- Optional: Create assets as versions of already existing assets: If all included assets are versions of already created assets. For more information, see *Versions* on page 140.

Functions

The following functions are available in the import folder under a selected asset via the ⋮ menu:

Function	Description
Edit	This opens the dialog for editing the asset attributes.
Open preview	This displays a large preview of the asset, even if no attributes have been edited yet.
Delete	If the assets have already been fully imported, they are moved to the recycle bin. If no changes have yet been made to the attributes after uploading, the assets are deleted. For more information, see *Deleting an Asset in the Import Folder* on page 87
Open details	Available on an asset where at least the mandatory fields in the asset attributes have already been filled in. You can identify the status by the green traffic light tag at the asset in the import folder. If an imported asset is tagged red, it means that the asset attributes have not yet been filled in. This command opens the detail view. To access additional functions, use the ⋮ menu located at the top right. For more information, see *Opening the Detailed View* on page 132.
Move to folder	You move the asset to an existing import folder that you have created in the past and still own.
Unzip	Unzip (Available for ZIP files): The ZIP file is unzipped and the contained assets are saved individually into the specified import folder. This function is required, for example, if you are creating InDesign documents with linked images as assets.

Function	Description
Change assets ownership	Available on an asset where at least the mandatory fields in the asset attributes have already been filled in. You can identify the status by the green traffic light tag at the asset in the import folder. Specify the new owner in the drop-down menu. See Change Asset Ownership.
Show folder	Opens the import folder of the asset. Only available at the asset if you are in the overview on the import page and not already in an import folder view.

4.3.1 Completing the Attributes of an Asset

1. Click > *Assets* > *Import* or click directly after an upload *To Import*.

   The *Import* page displaying all previous imports is loaded.

2. Select the import you want to edit:

   • If you want to edit the last import, it is already displayed in the expanded state at the top of the list.

   • If you want to edit another import:

      ○ Click on the name of the import to open it on a separate page.

        This is the only option in the list view.

      ○ In gallery mode, click on the arrow ⌄ after the name.

        This expands the import folder without leaving the overview.

   The content of the selected import folder is displayed.

3. Move the mouse to the tile of the asset whose attributes you want to complete.

4. Click the ⋮ menu at the bottom right of the asset tile and select *Edit*.

5. Optional: By clicking on the asset tile or directly on the + symbol at the bottom of the tile you can select the asset and then click on the pencil symbol or the *Edit* button in the footer of the window.

   The corresponding dialog box for editing the asset attributes opens.

6. Select an asset type from the *Asset Type* drop-down menu.

   The attributes assigned to the asset type are loaded and displayed.

7. Complete the attributes. Note: You must complete at least the mandatory attributes in order to save your entries. Mandatory attributes are marked by an asterisk (*).

8. Click *Apply*.

You have completed the import of the file and have turned it into an asset.

4.3.2 Completing the Attributes of Multiple Assets One by One

1. Click > *Assets* > *Import* or click directly after an upload *To Import*.

   The *Import* page displaying all previous imports is loaded.

2. Select the import you want to edit:

   - If you want to edit the last import, it is already displayed in the expanded state at the top of the list.

   - If you want to edit another import:

     ○ Click on the name of the import to open it on a separate page.

       This is the only option in the list view.

     ○ In gallery mode, click on the arrow ⌄ after the name.

       This expands the import folder without leaving the overview.

   The content of the selected import folder is displayed.

3. Choose one of the following options to select multiple assets:

   ○ If you only want to edit only pending assets in the import folder, select the filter *Waiting* in the toolbar.

   ○ If you want to select all of the assets contained in the import folder, activate the filter *All* in the toolbar. This includes already edited assets.

a. To select a range of assets, click on the tile of the first asset to edit. Hold down the $\boxed{\text{SHIFT}}$ key and click on the last asset in the import folder you want to edit. Note: Holding down the $\boxed{\text{SHIFT}}$ key for marking assets also works during scrolling in a long list.

b. Optional: To select and mark multiple assets, either click on the assets to be selected one after the other or directly on the + symbol in the footer of each asset tile. This allows you to mark multiple assets without having to select an entire area. Note: A multiple selection also works for multiple import folders after you expand them by clicking the down arrow ⌄ at the end of the row.

The assets you have selected are each marked with a checkbox.

4. Click the pencil icon with the *Edit* button in the footer of the window and select *.Edit assets one by one*.

   The dialog for editing the asset attributes opens for the first selected asset.

5. Select the asset type from the *Asset Type* drop-down menu.

   The attributes assigned to the asset type are loaded and displayed.

6. Complete the asset attributes of the displayed asset.

   Note: You must complete at least the required attributes in order to save your entries. Required attributes are marked with an asterisk (*).

7. Click *Save and next*.

8. Repeat steps 5 to 7 until the attributes of all selected uploaded assets in the import folder have been completed.

You have completed the import of the files and have turned them into assets. The edited assets are now available in the *Media Pool* module.

> **Note:**
>
> Even if no previews have been created yet, you can start editing the attributes of the import files. Editing large files takes a little longer. The previews and thumbnails are generated in the background and are available on the asset immediately after completion.

4.3.3 Completing the Attributes of Several Assets at Once

If you want to edit the attributes of several assets simultaneously, the following mandatory attributes must be identical:

- Asset type
- Virtual database (VDB), which means the set of users for which the asset is visible.
- at least one category
- Mandatory attributes of the asset type

These attributes must be edited to access the asset in the module. The other attributes may differ and can then be edited separately for each asset.

1. Click > *Assets* > *Import* or click directly after an upload *To Import*.

   The *Import* page displaying all previous imports is loaded.

2. Select the import you want to edit:
   - If you want to edit the last import, it is already displayed in the expanded state at the top of the list.
   - If you want to edit another import:
     - Click on the name of the import to open it on a separate page.

       This is the only option in the list view.
     - In gallery mode, click on the arrow ⌄ after the name.

This expands the import folder without leaving the overview.

The content of the selected import folder is displayed.

3. Choose one of the following options to select multiple assets:

    ◦ If you only want to delete only pending assets in the import folder, select the filter *Waiting* in the toolbar.

    ◦ If you want to select all of the assets contained in the import folder, activate the filter *All* in the toolbar. This includes assets that have already been edited.

        a. To select a range of assets, click on the tile of the first asset to edit. Hold down the ⌈SHIFT⌉ key and click on the last asset in the import folder you want to edit.
        Note: Holding down the ⌈SHIFT⌉ key for marking assets also works during scrolling in a long list, but the range selection does not work across several expanded import folders.

        b. Optional: To select and mark multiple assets, either click on the assets to be selected one after the other or directly on the + symbol in the footer of each asset tile. This allows you to mark multiple assets without having to select an entire area.
        Note: A multiple selection also works for multiple import folders after you expand them by clicking the down arrow ⌄ at the end of the row.

        The assets you have selected are each marked with a checkbox.
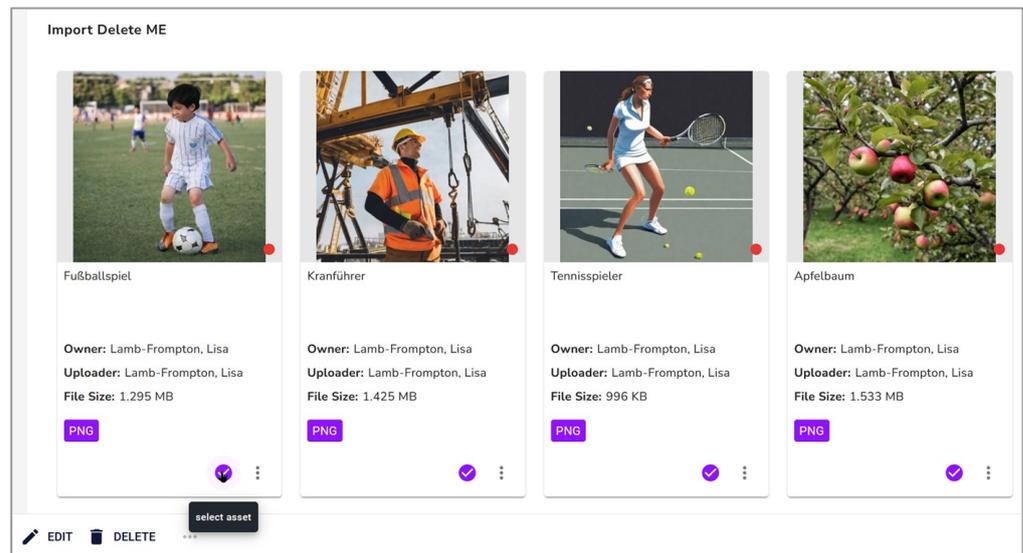
4. Click the pencil icon with the *Edit* button in the footer of the window and select *.Edit all assets at once*.

    The dialog for editing the asset attributes opens.

> **Note**
>
> In the displayed dialog box, you edit the attributes of several selected asset attributes simultaneously. Note in particular the mandatory fields. Edit the required fields under two conditions:
>
> - You want these attributes to receive the same value in all of the selected assets.
>
> - These attributes have not been filled yet. (Exceptions are the *Asset name* and *Tags* mandatory fields. *Asset name* is always prefilled and *Tags* may be prefilled. Editing is therefore not required in each case.)

7. Select the asset type from the *Asset Type* drop-down menu.

   The attributes assigned to the asset type are loaded and displayed.

8. Complete the asset attributes.

   Note: You must complete at least the required attributes in order to save your entries. Required attributes are marked with an asterisk (*).

9. Click *Save and close*.

You have completed the import of the files and have turned them into assets. The edited assets are now available in the *Media Pool* module.

4.3.4 Deleting an Asset in the Import Folder

> **Caution! Data loss!**
>
> The deletion of uploaded but not yet edited assets cannot be undone!

Note when deleting an asset:

- If the asset has already been imported, it is moved to the recycle bin.

- If the asset has only been uploaded, but its attributes have not yet been completed, then it is deleted.

Deleting one Asset in the Import Folder

1. Click > *Assets* > *Import* or click directly after an upload *To Import*.

   The *Import* page displaying all previous imports is loaded.

2. Select the import you want to edit:

   - If you want to edit the last import, it is already displayed in the expanded state at the top of the list.

   - If you want to edit another import:

     ◦ Click on the name of the import to open it on a separate page.

       This is the only option in the list view.

     ◦ In gallery mode, click on the arrow ⌄ after the name.

       This expands the import folder without leaving the overview.

   The content of the selected import folder is displayed.

3. Move the mouse over the preview image of the asset to be deleted.

4. Click the ⋮ menu at the bottom right of the asset tile and select *Delete* from the drop-down menu.

   A confirmation prompt is displayed.

5. Click *Delete*.

You deleted an asset from the Import folder.

Deleting Multiple Assets in the Import Folder

1. Click > *Assets* > *Import* or click directly after an upload *To Import*.

   The *Import* page displaying all previous imports is loaded.

2. Select the import you want to edit:

   - If you want to edit the last import, it is already displayed in the expanded state at the top of the list.

   - If you want to edit another import:

     ◦ Click on the name of the import to open it on a separate page.

This is the only option in the list view.

- In gallery mode, click on the arrow ⌄ after the name.

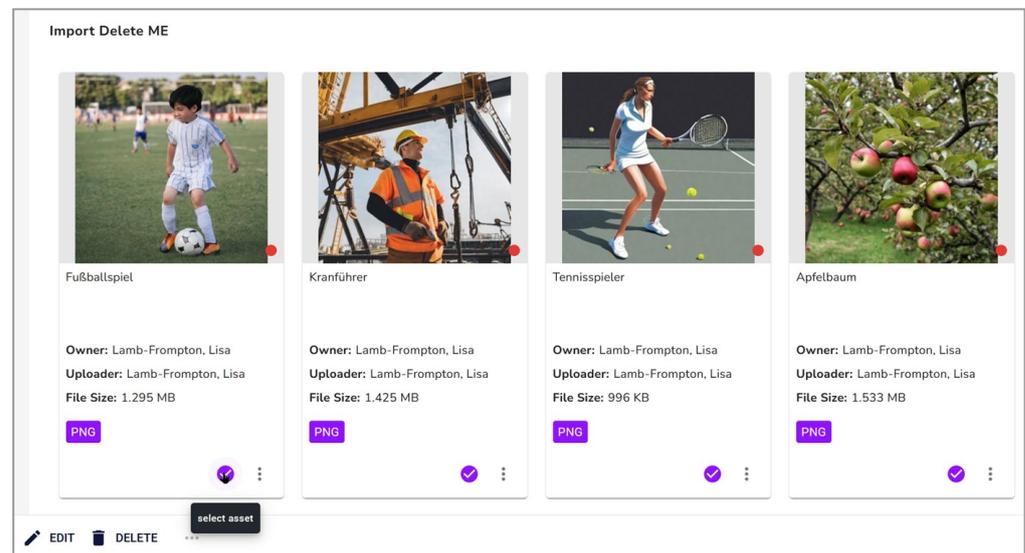 This expands the import folder without leaving the overview.

The content of the selected import folder is displayed.

3. Choose one of the following options to select multiple assets:

   - If you only want to delete only pending assets in the import folder, select the filter *Waiting* in the toolbar.

   - If you want to select all of the assets contained in the import folder, activate the filter *All* in the toolbar. This includes assets that have already been edited.

     a. To select a range of assets for deletion, click on the tile of the first asset to delete. Hold down the SHIFT key and click on the last asset in the import folder you want to delete. Note: Holding down the SHIFT key for marking assets also works during scrolling in a long list.

     b. Optional: To select and mark multiple assets, either click on the assets to be selected one after the other or directly on the + symbol in the footer of each asset tile. This allows you to mark multiple assets without having to select an entire area.
     Note: A multiple selection also works for multiple import folders after you expand them by clicking the down arrow ⌄ at the end of the row.

     The assets you have selected are each marked with a checkbox.
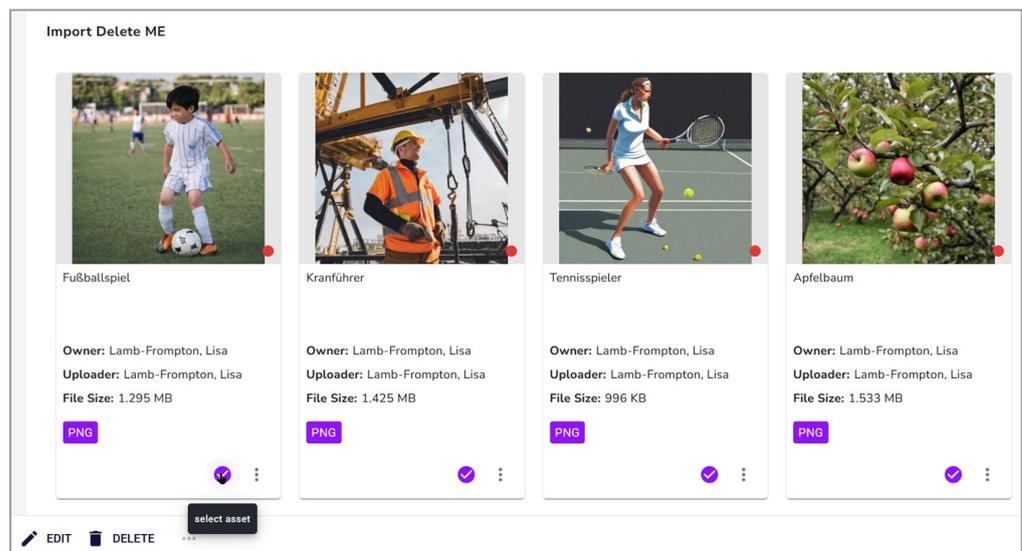
c. Click the trash can icon with the *Delete* button in the footer of the window.

A confirmation prompt is displayed.

d. Click *Delete*.

The selection of assets will be deleted from the Import folder.

4.4 Uploading InDesign Documents With Linked Images

In the *Media Pool* module, you have the option of managing InDesign documents with linked images. After the import, the number of linked images is listed in the detailed view of the InDesign document.

Prerequisite

A prerequisite is that you import the InDesign document together with the linked images in a ZIP file.

> **Note**
>
> Note that Uptempo does not support the import of nested ZIP files. Uptempo recommends that you do not store the InDesign file and linked images in subfolders.

Creating InDesign Documents With Linked Images as Assets

If you have uploaded an InDesign document with linked images in a ZIP file, you first have to unpack the ZIP file:

1. Upload the ZIP file that contains the InDesign file and the linked images.

2. Open the import folder that contains the uploaded ZIP file.

3. On the uploaded ZIP archive, select > ⁝ > *Unzip*.

4. In the *Unzip* dialog box that opens, enter the name for a folder.

5. Click *Unzip*.

6. Click *To Import* after unzipping has finished.

   The import folder is displayed together with the unpacked InDesign file and the linked images.

7. Select the files you want to create as assets by clicking on their preview images or the + symbol under the preview image.

   The toolbar with *Edit* button at the bottom left appears.

8. Click *Edit* and select one of the possible editing functions (see chapter Import Area).

   The respective dialog for editing the asset attributes opens.

9. Select the asset type.

The attributes assigned to the asset type are displayed.

10. Complete the asset attributes.

11. Click *Save*.

You have uploaded the InDesign file with the linked images and created them as assets.

Searching

5

The search under> *Assets* > *Search* is optimized for the conditions in your company. That allows the search to provide you with rapid results and help you quickly find the relevant assets with no need for complex search requests. Using customized saved search filters and the assigned categories, users can easily and quickly compile a specific type of imagery (e.g. product images, outdoor motifs, people, etc.).

Searching for an Asset

If you click > *Assets* > *Search* the search page is displayed.It is possible that no assets are listed for the preset search the first time the module is called. This must be set up by an administrator. If you have any questions, please contact your system administrator.
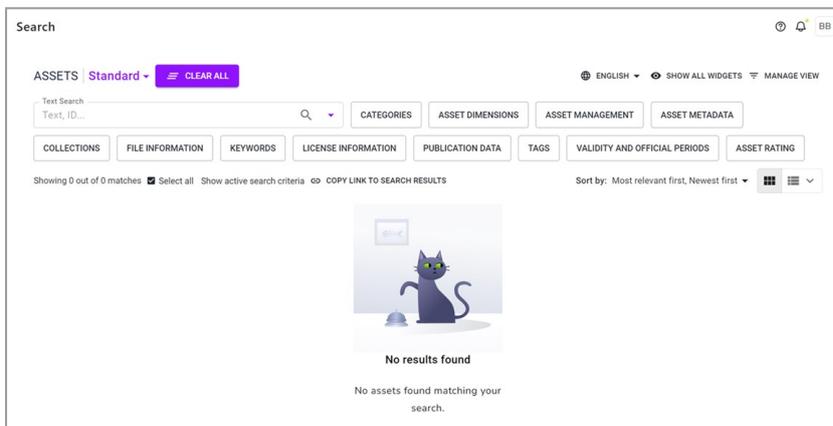
To receive a search result, enter a search criterion in the widgets, e.g.:

- Enter a keyword and press the ⏎ key or click the magnifying glass icon.
- Click a widget. A dialog opens in which you can enter, select or click on search criteria. Click *Confirm* to close the widget.

All of the assets available to you which match the search criteria will then be displayed. Note that you can select which user interface language is searched in the top right corner.
If you combine the entry of a search term and the setting of search criteria in other widgets, all criteria must apply in order to obtain a result. For more information about widgets, refer to the section below.

> 📄 **Note**
>
> The widgets that are displayed when you first open the screen depend on how your system is configured. If you have any questions, please contact your system administrator.

Widgets and Views

Widgets combine asset attributes like dimensions, tags, keywords or file information. Users can define multiple criteria in each widget. A detailed description of the available widgets is provided in the chapter *Widgets* on page 97.

Any search which has been defined in the widgets can be saved as a separate view and published so that it can be shared with other users. You can also define for yourself which widgets are visible, the order in which they are displayed and which view is used as your default view. For more information about views, please refer to the chapter *Views* on page 117.

Structure of the Search Results

For a description of the search results structure, see *Start Page and Search* on page 44.

Start new Search: Reset Search Criteria

To quickly start a new search efficiently, you can reset the search criteria using the following functions:

- Reset all search criteria at once: Click next to the drop-down list of views *Reset All*. The button is displayed only after a search has been performed.

- Reset the search criteria of a widget: Click the × on the widget. The × symbol is displayed only after a search with the search criteria has been performed.

Select Multiple Assets

Multiple assets can be selected in the search results by checking the box next to each asset. When the asset is selected, the checkbox turns orange.

You can select any number of assets by holding down the SHIFT key: Click on the first and the last desired asset while holding down the SHIFT key. In this case, the first, the last, and all assets in between are selected. A MENU... button appears above the search results. The functions available there can be applied to the entire selection at once, e.g. *Subscribe*.

Sharing Searches and Setting Bookmarks

You can share performed searches or set a bookmark for them.

If you want to share a search, click the *Copy link to search results* button above the asset displayed after you perform the search. You can use the shortcut `CTRL` - `V` or `CMD` - `V` to paste the URL somewhere else and, for example, share it with another user by e-mail. If the recipients have the appropriate authorization, they can also perform the search. However, if the other user has different access permissions to the assets, the search results using the submitted link may vary.

To be able to carry out a specific search more quickly, it is advisable to set a bookmark. To do this, set up the search query accordingly and execute it. Then set a bookmark in your browser using the keyboard shortcut `CTRL` - `D` or `CMD` - `D`.

> **Note**
>
> Note that shared searches and set bookmarks cannot be managed centrally. If the search criteria has to be updated, you must share the search again or update each bookmark manually.
>
> An alternative is to solve this kind of use case by using views, see *Views* on page 117.

5.1 Widgets

The widgets are placed as buttons next to the search field. The widgets combine asset attributes such as dimensions, tags, keywords, or file information. In each widget, users can define multiple search criteria. They can also select their preferred language for text searches, regardless of the user interface language.

> **Note**
>
> Note that the search criteria specified in the widget descriptions may not be available on your system. In this case, the required function or module is not enabled by your administrator.

Changing Widget Display

Typically, you will initially see only a selection of widgets defined by the administrator. If you want to display a widget because you want to use the search criteria contained within it for your own search, follow these steps:

1. Click > *Assets* > *Search*.

   The search page is displayed. The upper part of the window displays the widgets and, if applicable, the search input field of the default view.

2. Choose:

   A. If you want to see all available widgets: Click *Show all widgets* in the top right-hand corner.

   OR:

   B. If you want to select from the available widgets: Click *Manage view* in the top right-hand corner.

   The *Edit view* dialog is shown at the right.

3. Click the gray crossed-out eye 👁️ next to the widgets you want to activate.

4. Optional: Change the order of the widgets via drag and drop by grabbing the ≡ handle at the beginning of the row.

5. Close the dialog box.

The selected widget view is displayed. You can save the changes as a view. Refer to chapter *Views* on page 117.

Using Widgets

For most widgets, the top section allows you to choose how multiple criteria are combined with each other in the widget. You can use the *Find assets that match the search criteria as follows* selection to choose whether to list assets to which all, at least one or none of the criteria apply. Note that this may not cover all the criteria for the widget. If this is the case, you can find a corresponding message in the descriptions below.

The bottom section of the widgets contains the buttons *Clear all*, *Cancel* and *Apply*. These buttons trigger the following actions:

Button	Action
Clear all	The criteria are reset. Please note that, in certain circumstances, this may not apply to all settings. The widget remains open.
Cancel	The settings are reset. The widget is closed. No new search is triggered and the previous search results are kept.
Apply	The widget is closed. A new search is triggered with the existing criteria. The search result depends on which assets the user has access to.

Text Search

Enter one or more keywords in the *Text Search* widget. After you enter the first three characters, a list of matching keywords is displayed. You can enter additional characters or choose a suggestion from the list. Regardless of this, you can always start a search by typing at least two characters in the search box. To start the search, press ⏎ or click the 🔍 icon.

If you click the down arrow on the right of the widget, the following dialog box opens:
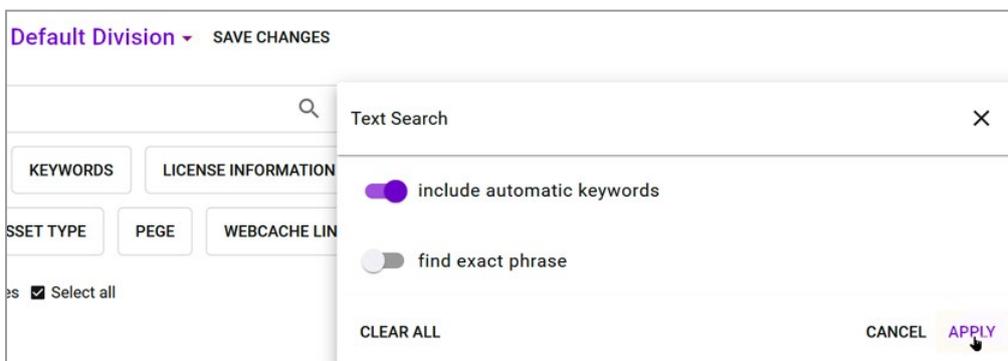
Here you can select whether only assets are listed whose searched fields contain the exact keyword entered or also partial hits. With the second option, you decide whether the automatic tags are also searched. The automatic tags are determined using the AI tagging system, when an asset is uploaded.

Asset Dimensions

This widget is used to search for assets with specific dimensions.
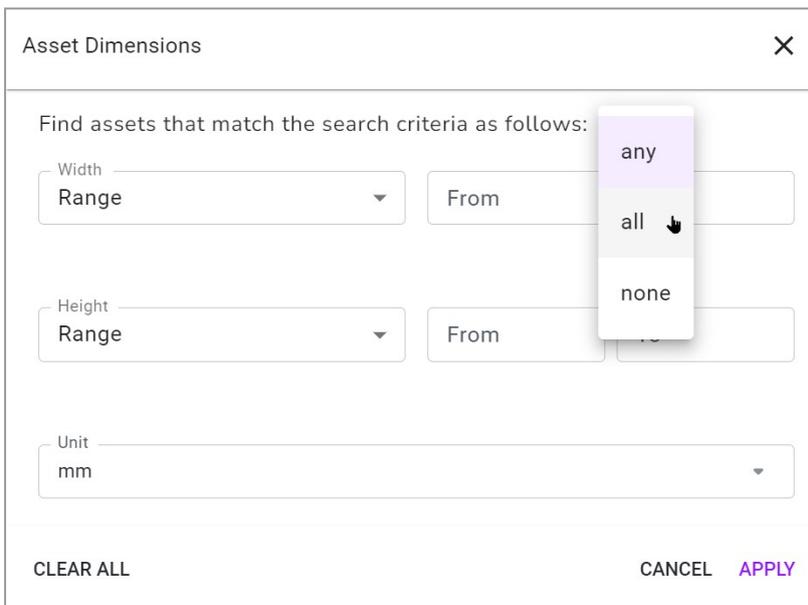
Select the option that best reflects your desired search outcome: to match *any*, *all*, or *none* of the selected criteria. You can enter the *Width* and *Height* in the top area of the dialog. Use the field on the left in the relevant lines to select whether to search for an asset of a specific size or within a specific size range. If you are searching within a size range, enter the range in the fields to the right *(From… To)*. If you want to search for a specific size, enter the size on the right. Choose a unit in the bottom drop-down list. (*px*, *cm*, *mm* or *inch*).

Asset Rating

This widget is used to search for assets with a specific star rating. Note that the rating function must be enabled in your system to do so.

Select the radio button for a rating to find assets that have at least that (average) rating. Click *Apply* to set this search setting.

Asset Metadata

The *Asset Metadata* widget is used to search through asset metadata.

Uptempo

Asset Metadata   ✕

Find assets that match the search criteria as follows: any ▾

| Asset ID |

┌─ Affiliate ID ─────────────────────┐
│ 123_AD │   ☑ Exact phrase

┌─ Date uploaded ─┐
│ Range (custom) ▾ │   │ From   📅 │   │ To   📅 │

│ Uploaded by   ▾ │

┌─ Last updated ──────────────┐
│ Within the last 2 weeks   ▾ │   04/04/2024 - 04/18/2024

CLEAR ALL   CANCEL   **APPLY**

Criterion	Description
Asset ID	This allows you to search for assets with a specific ID. It is not necessary to enter the leading *M-*. If you do not know the full ID, you can work with wildcards: Entering *234** will find all assets whose ID starts with 234, e.g. *2345*, *2346* or *23477*. Searching for IDs with specific ending digits is not possible: **234* yields no hits.
Affiliate ID	This allows you to search for assets allocated to a specific affiliate. If you do not know the full ID, you can enter part of the ID, wildcards are not needed: Enter *234* to find assets assigned to branches *1234*, *234* or *2345*, for example.
Date uploaded	This allows you to search for assets which were uploaded on a specific date or during a specific date range. You can select a predefined date range in the field to the left. Alternatively, you can select the settings *Exact date* or *Range (custom)*. If you select *Exact date*, enter a date or select a date using the date picker on the right. If you select *Range (custom)*, you must enter a date range in the fields *From... To.*
Uploaded by	This drop-down list allows you to pick a user whose uploaded assets you would like to search for.

Criterion	Description
Last updated	This allows you to search for assets whose attributes were last edited on a specific date or during a specific date range. You can select a predefined date range in the field to the left. Alternatively, you can select the settings *Exact date* or *Range (custom)*. If you select *Exact date,* enter a date or select a date using the date picker on the right. If you select *Range (custom)* you must enter a date range in the fields *From... To.*

Asset Management

The *Asset Management* widget is used to search through attributes which are used to manage the asset.

Criterion	Description
Asset name	This allows you to search for an asset with a specific name or part of the name of the asset.

Criterion	Description
Item number	This allows you to search for assets with a specific item number.
Org. unit	This allows you to search for assets whose owners are allocated to a specific organizational unit.
Language	This allows you to search for assets with a specific assigned language.
Country	This allows you to search for assets with a specific assigned country.
Vdb	This allows you to search for assets allocated to one ore more specific VDBs. When creating a search filter, a multi-selection of VDBs is possible.
Persons shown	This allows you to search for assets on which a specific person is depicted.
ISIN	This allows you to search for assets with a specific assigned ISIN.
include variants	Select whether variants should also be included in the search.

The following criteria are not considered by the *Find assets that match the search criteria as follows:* option.

Criterion	Description
In Recycle Bin	Choose whether the recycle bin should also be searched.
In My Subscriptions	Activate this switch if you want to restrict your search to assets to which you are subscribed.
Download approval	Choose whether you would like to search for assets that require download approval.

File Information

This widget is used to search for assets with specific file properties.

File Information	✕

Find assets that match the search criteria as follows: any ▼

⌄ ⌃ 🔍

2 selected   clear all   ⌃

☑ webp (96)

☑ png (128)   [png (128)]

⌄ ☐ Image (1622)

☐ ai (8)

☐ bmp (0)

☐ eps (2)

☐ gif (2)

☐ jpg/jpeg (1367)

☑ png (128)

☐ ps (3)

☐ psd (1)

☐ svg (14)

☐ tif/tiff (1)

☑ webp (96)

CLEAR ALL   CANCEL   APPLY

Criterion	Description
File type/ex-tension	Select the file types to search for. In the tree, activate the checkboxes for the file types that you would like to search for. If you do not want to search through the tree manually, you can enter the type in the search field (e.g. *png*). Hits are displayed directly in the tree below it.
File size	Enter the file size that you are searching for. Use the field on the left to specify whether you are searching for a file size within a specific range or an exact file size. If you are searching for assets with a file size within a specific range, enter the range in the From and To fields. If you are searching for assets with a specific size, enter the size. Then select the size unit (*KB*, *MB* or *GB*).
Color model	Select the color models that you are searching for.

Validity and Official Periods

This widget is used to search for assets that are valid or official within a specific period.

Uptempo

Validity and Official Periods	✕

Find assets that match the search criteria as follows: all ▾

Asset Validity	From	To
In range ▾	03/01/2023 ✕	04/18/2026 ✕

Official version	After
Starting after ▾	08/23/2023 ✕

CLEAR ALL   CANCEL   APPLY

Criterion	Description
Asset Valid-ity	This widget is used to search for assets that are valid within a specific period. In the field on the left, select which kind of period you are searching for (e.g. *Beginning from* a specific date). Enter the specific date range in the fields on the right.
Official version	This widget is used to search for assets that are marked as official within a specific period. In the field on the left, select which kind of period you are searching for (e.g. *Beginning from* a specific date). Enter the specific date range in the fields on the right.

Categories

This widget is used to search for assets with specific assigned categories.
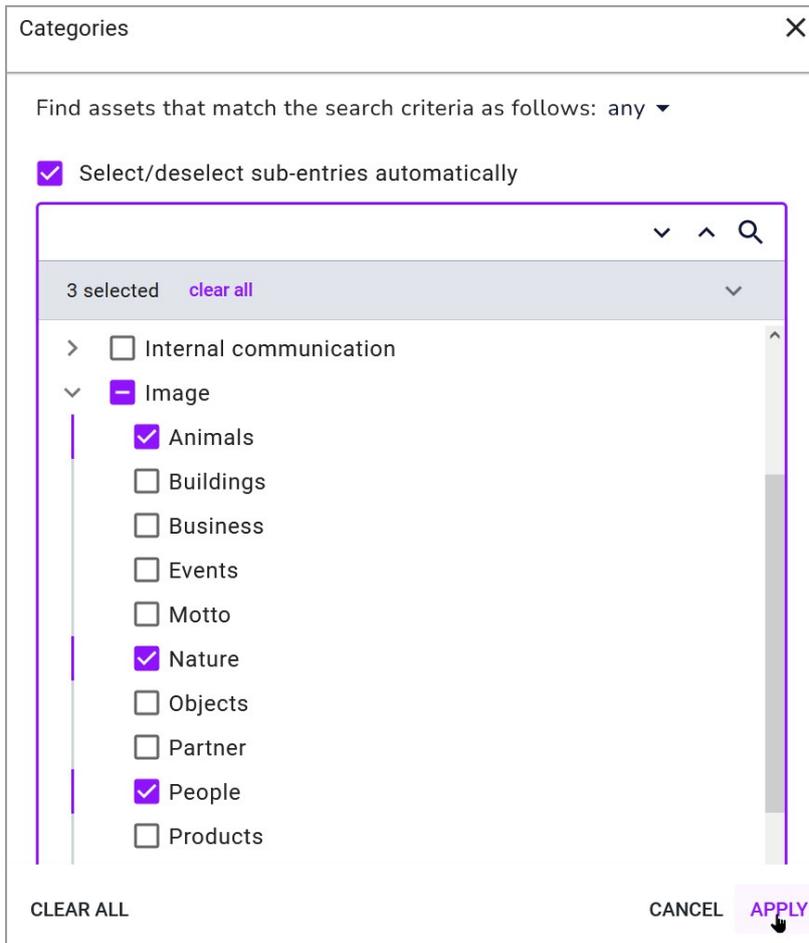
In the tree, select the categories that you would like to search for. If you do not want to search through the tree manually, you can enter a category in the search field. Hits are displayed directly in the tree below it. Use the checkbox above the selection field to choose whether subordinate categories should be included automatically.

License Information

This widget is used to search for assets with specific license data.

Criterion	Description
License name	This allows you to search for assets to which a specific license has been allocated.
License required	Search for assets that require a license.
License type	This allows you to search for assets to which a license of a specific type has been assigned.
License purpose	This allows you to search for assets to which a license with a specific purpose has been assigned.
License validity	This allows you to search for assets with a license with a specific validity period.

Collections

This widget allows you to search for assets allocated to specific collections.
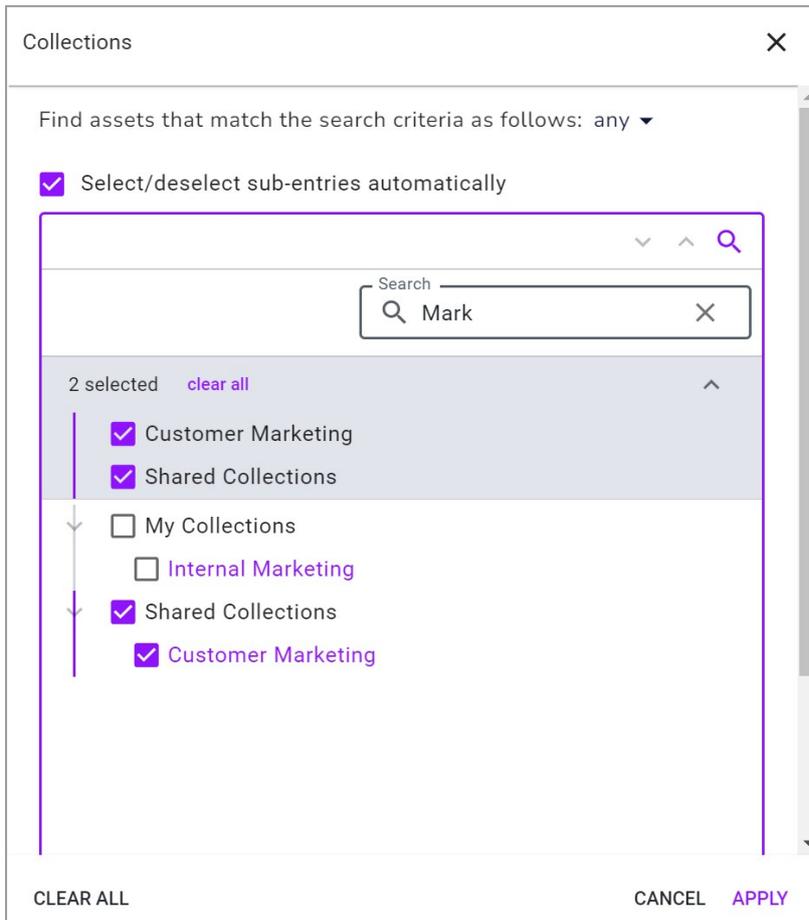
In the tree, select the collections to be searched. If you do not want to search through the tree manually, you can enter a collection in the search field. Hits are displayed directly in the tree below it. Use the checkbox above the selection field to choose whether subordinate collections should be included automatically.

Keywords

This widget is used to search for assets with specific assigned keywords.
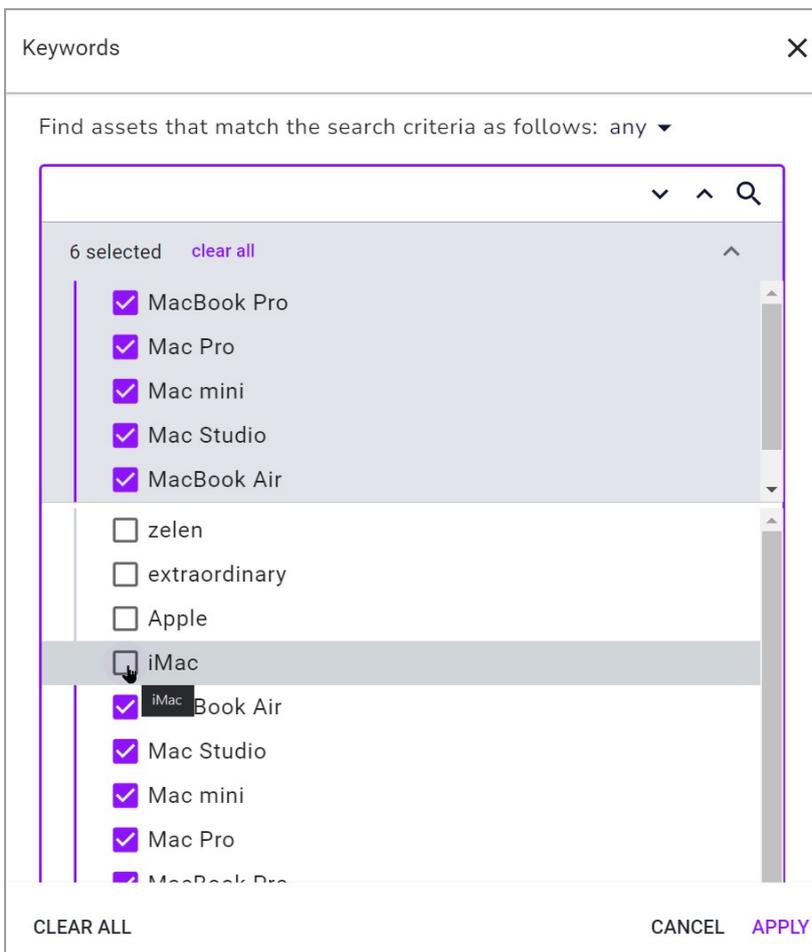
Check the boxes for the keywords that should be included in the search. If you do not want to look through the entire list, you can enter a search term in the search field. Hits will be displayed directly.

Tags

This widget is used to search for assets with specific tags assigned.
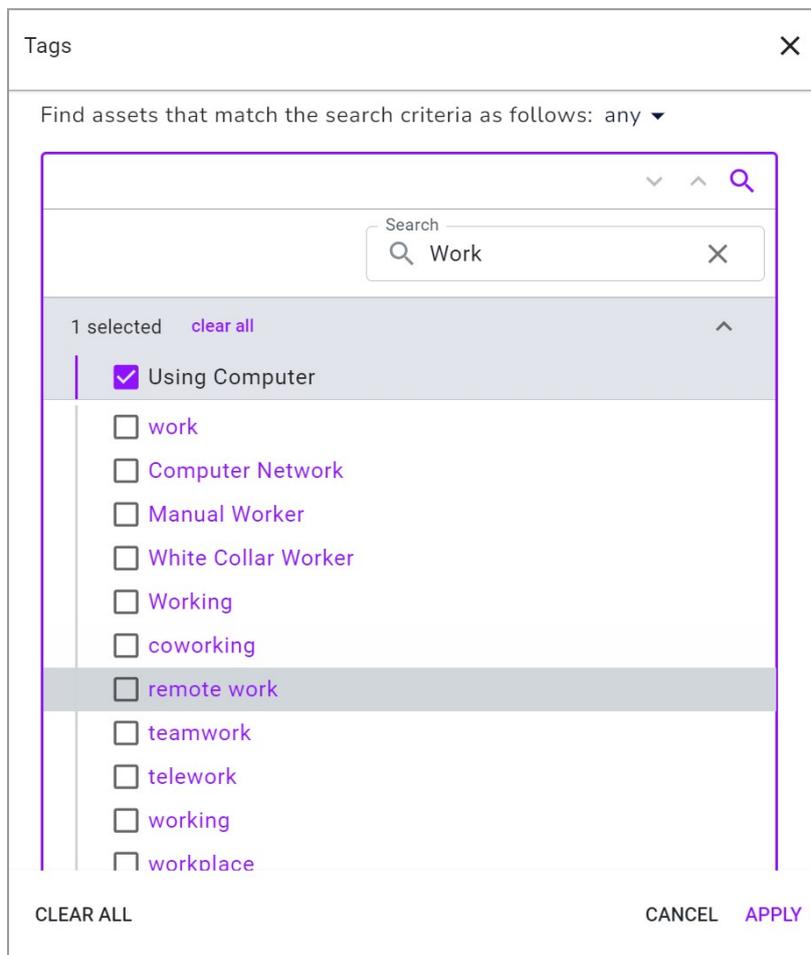
Check the boxes for the tags that should be included in the search. If you do not want to look through the entire list, you can enter a search term in the search field. Hits will be displayed directly.

Publication Data

This widget is used to search for assets with specific publication information.

Criterion	Description
Currently published	This allows you to search for assets that are currently published.
Publication channel	This allows you to search for assets that were published in a specific channel.
Publication date	This allows you to search for assets that were published during a specific period. In the field on the left, select which kind of period you are searching for (e.g. *Beginning from* a specific date). Enter the specific date range in the fields on the right.
Suitable for Brand Templates	This allows you to search for assets whose quality is sufficient for use in Brand Template Builder.
Print quality	This allows you to search for assets whose resolution meet the criteria for print quality.

Custom Text Fields

Automatically displayed in the widget for each customized field. If a name is entered for a customized field, the widget is automatically given the same name.

Customized fields can be created as *Custom Attributes* fields, using formatted text or a drop-down list. These types are described below:

Free Text Field

Widgets of this type are used to search for assets to which a specific keyword has been allocated in this property.

Vegetable	✕
Entry Pak Choi	☐ Find empty
CLEAR ALL	CANCEL APPLY

Use the field to enter the word that you want to search for. Check the box if you would like to find assets for which nothing is entered in this property.

Formatted Text

Widgets of this type are used to search for assets to which a specific keyword has been allocated in this property.

Formatted Text	✕
Formatted teamwork	☐ Find empty
CLEAR ALL	CANCEL APPLY

Use the field to enter the word that you want to search for.

Multi Select List

Widgets of this type are used to search for assets to which a specific selection has been allocated in this property.

Tick the checkboxes next to the values you want to include in the search. If you do not want to look through the entire list, you can enter a search term in the search field. Hits will be displayed directly.

5.2 Search Results

You can choose between two different views for the view of a hit list: the Gallery view or *List view*. You can sort both views in ascending or descending order according to date, title, or file size, for example. More information about the asset can be displayed in the list view, while only three are possible in gallery mode. You can switch between the thumbnail and list view simply by clicking the mouse.
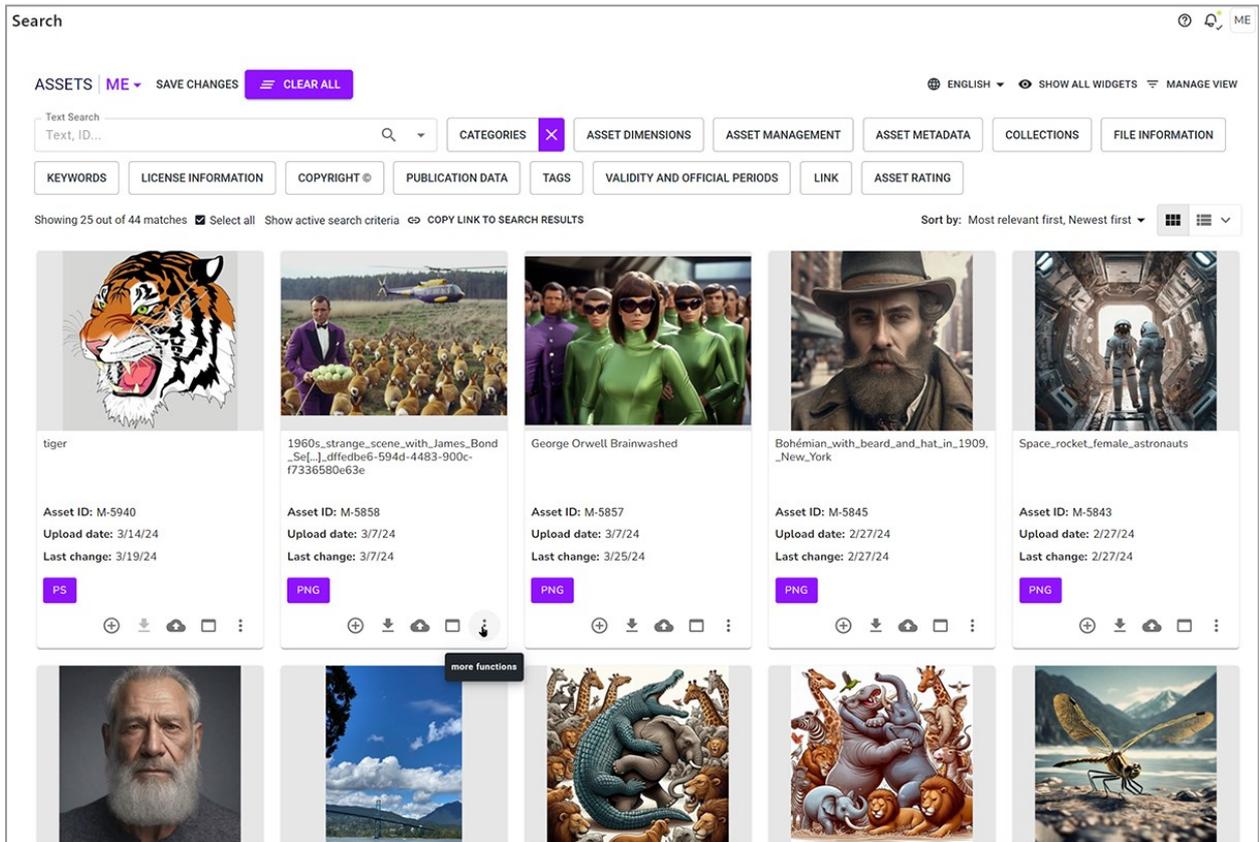
Sorting Options

You can combine up to three sorting criteria and prioritize them in the list of sorting options using drag-and-drop.

1. Click on *Sort by* above the hit list.

   The *Sorting Options* dialog opens.

2. Use the drop-down menu to select other sorting options if you do not like the default setting.

3. Optional: Drag and drop the search criteria into the desired sort order by grabbing ▬ at the

beginning of the line.

This means that the search results are first sorted by criterion 1, the intermediate result is sorted by criterion 2, and finally this intermediate result is sorted and displayed by criterion 3.

Sorting Option	Description
Most relevant first	Sorts assets by their relevance to the search query, with the most relevant assets listed first.
Least relevant first	Sorts assets by their relevance to the search query, with the least relevant assets listed first
Best rated first	Sorts assets by their rating, with the highest rated assets first.
Worst rated first	Sorts the assets by their rating, with the least rated assets listed first.
Biggest file first	Sort assets by file size, with the largest files listed first.
Smallest file first	Sort assets by file size, with the smallest files listed first.
Last updated first	Sort assets by the date they were last updated, with the most recently updated assets listed
Oldest updated first	Sort assets by the date they were last updated, with the oldest updated assets listed first.
Most downloaded first	Sort assets by number of downloads, with the most downloaded assets listed first.
Least downloaded first	Sort assets by number of downloads, with the least downloaded assets listed first.
Name (A-Z)	Sort assets alphabetically by name in ascending order.
Name (Z-A)	Sorts assets alphabetically by name in descending order.

Expanding the List View

In *List view* you can display more asset attributes than it is possible with *Gallery view*.

1. Instead of clicking directly on the *List view* icon, click the ⌄ menu next to the *List view* icon to expand the view.

2. To expand the *List view*, click ⌄ > *Expanded list*.

3. To return to the default settings, click List view ⌄ > *Compact list*.

You have expanded the list view.

5.3 Views

Any search which has been defined in the widgets can be saved as a separate view and published so that it can be shared with other users. You can create a view to be a default view if you frequently use the same criteria or widgets. This default view will then be displayed when you open the *Media Pool* module.

Associated Tasks

- *Creating a view* below

- *Editing a View* on the next page; Please note that you can only edit your own views.

- *Copying a View* on page 119

- *Delete View* on page 119; Please note that you can only delete your own views.

5.3.1 Creating a view

1. Click > *Assets* > *Search.*

2. If the required widgets are not displayed:

   a. Click *Manage widgets*.

      The *Edit view* dialog box opens.

   b. Activate the display of the widgets that you need and deactivate the display of the widgets that you do not need in the display.

3. If the view should contain search criteria: Set the search criteria in the widgets.

4. Optional: For multilingual attributes, set which language to search.

5. Optional: Set the sort order.

6. Click *Manage view*.

   The *Edit view* dialog box opens.

7. Enter a name for this view in the top field (maximum 255 characters).

8. Optional: Activate the *View is public* checkbox if you want to make the view available to other users.

9. Optional: Activate the *This is my default view.* checkbox if you want to use the view whenever

you start the module *Media Pool*.

10. Click *Save*.

You have now created the view. To change the view, open the drop-down list located on the top left of the start page, next to the page title *Assets*.

5.3.2   Editing a View

> 📄 Note
>
> Please note that you can only edit your own views.

1. Click > *Assets* > *Search*.

2. Open the selection list of views at the top left and under the list heading *My views*, select the view you want to edit.

3. Optional: Click *Show all widgets* to display all configured search widgets.

4. Click *Manage view*.

   The *Edit view* dialog is shown at the right.

5. Change the properties of the view. This covers the following areas:

   ◦ Widget display

   ◦ Widget order

   ◦ Search criteria in widgets

   ◦ The the language searched for multilingual attributes

   ◦ The *View is public* property.

   ◦ The *This is my default view.* property.

6. Click *Save changes* in the top left next to the view drop-down list.

You have edited the view.

5.3.3 Copying a View

1. Click > *Assets* > *Search*.

2. To copy a view, open the drop-down list located on the top left of the start page, next to the page title *Assets*. Select the view, you would like to copy.

3. Click *Manage widgets*.

   The *Edit view* dialog box opens.

4. Enter a new view name.

5. Click *Save*.

6. Close the dialog box.

The view will be displayed under the new name and can be opened from the view drop-down list.

5.3.4 Delete View

> 📄 Note
>
> Please note that you can only delete your own views.

1. Click > *Assets* > *Search*.

2. Open the selection list of views at the top left.

3. Click the × symbol next to the view which you would like to delete.

   A confirmation prompt is displayed.

4. Confirm the prompt.

The view will be deleted.

5.4 Forming Search Terms

To make search terms more efficient, you can use various search techniques and combine several search terms.

Umlauts and Eszett

Umlauts are handled in accordance with DIN 5007 and are recognized as their corresponding normal vowels. For example, the system searches for "Ä", "Ö", or "Ü" as if you had entered "A", "O", or "U". This also applies to most special letters that resemble simple letters in other languages (å = a, œ = oe). You can use both spellings when searching. This is practical if the computer keyboard you are using does not have a language specific keyboard layout. The Eszett letter ("ß") is only used in German. It can be typographically replaced by typing double-s ⟨ss⟩ if the ß character is not available.

Searching for a Search Term

Enter a search term in the search field. The search is not case-sensitive.

Searching for Parts of a Word

You can enter only a recognized part of a word in the search field. All the assets in which the part of the word is found in the searched attributes are listed as hits. At least two characters must be entered for the search to return a result.

Search Term	Search Results
tree	Apple tree, pear tree, treehouse
NFL	Dragonfly, NFL playoffs, conflict

Searching for Several Terms

You can combine several search terms for a search. Separate the individual search terms that you enter in the search field using a blank space to link the search terms to each other in an "And" relationship. The search result shows all assets for which all entered search terms are found in the searched attributes. This also applies to searching for word parts.

Search Term	Search Results
important document [alternatively: *important AND document*]	the *document* is *important* one *important* document

Search for an exact phrase

Use quotation marks to search for an exact phrase. Only assets for which the phrase between the quotation marks was found exactly in the searched attributes are displayed as search results. A blank character within the quotation marks is not interpreted as an "And" relationship.

Search Term	Search Results
"an important"	*An important* document

Searching for Alternative Words

You can search for different search results at the same time by separating them with an "OR". All assets for which at least one of the specified search terms is found in the searched attributes are displayed as search results.

> **Note**
>
> You must write "OR" in capital letters.

Search Term	Search Results
one OR two OR three	That is *one* of the important documents That is *one* of the *three* most important documents That is *one* of *two* important documents

Excluding Words

You can exclude words from the search by placing a minus sign before the word. All words that do not have a minus sign are automatically linked with "And". All assets for which all search terms considered are found in the searched attributes are displayed as search results.

Search Term	Search Results
One -two three	That is *one* of the *three* most important documents

Not found in this example: "That is one of the two most important documents".

Search for the Asset ID

If the attribute is searched through, you can search for an asset ID. When you do so, you do not always have to enter the leading "*M*".

Search Term	Search Results
M-1234	The asset with the *M-1234* asset ID and other assets for which *M-1234* is found in other searched fields.
1234	The asset with the *M-1234* asset ID and other assets for which *1234* is found in other searched fields.

Administrate 6

As a DAM user, Alice's tasks include the following:

- Checking the metadata and licenses of stock photos before publication

- Providing variants in different sizes and formats for output on different channels

Asset management or administration also includes these areas:

- *Management of the Asset Attributes* on page 132: Using the attributes, you define information for and about the asset. Some attributes can be created and maintained for the system languages.

- *Versions* on page 140: As a result of improvements, corrections, or revisions, there may be several versions of an asset. You can use versions in the module *Media Pool* to map the successive or different conditions of an asset.

- *Review* on page 148: You can use the Review Manager module to start an asset check.

- *Revisions* on page 149: You can use the Job Manager module to create a job for an asset, for example, to request an image correction or re-edit for a required image, quickly and easily.

- *Deleting* on page 150: You can delete assets which are outdated or no longer required and move them to the Recycle Bin.

- *Restoring* on page 152: You can restore assets that were moved to the recycle bin.

- ⋮ Menu and MENU… Button: Use either the `MENU...` button that appears above the search results for the possible collective actions or the ⋮ menu on the right-hand side of the asset or in the detailed view to access the functions for editing individual assets.

6.1 ⋮ Menu and "MENU..." Button

The ⋮ menu and the `MENU...` button are displayed at various points on the user interface so that you can quickly access the desired functions.

- The ⋮ menu is available at the bottom right of each search result tile in the gallery view and on the right in the list view. In the case of multiple selections, the `MENU...` button appears above the results. It allows you to perform actions on multiple selected assets.

- In the detailed view of the asset, which opens after you double-click on a search result, the ⋮ menu is located at the upper right corner next to the close box.

- In the > *Assets* > *Collections* area, a menu button is placed that allows you to access the functions you need to edit your collections.

Your permissions determine which functions you can access in the menu.

> **Note**
>
> Depending on whether you want to call a function for a single asset or for multiple selected assets, you must use the individual Menu button for the selected asset or the Menu button displayed at the bottom of the thumbnail or list view. You can use the functions for editing collections only in the > *Collections* area.

The following screenshot shows the expanded ⋮ menu for a single asset:

📁	Open
🔍	Preview
✏️	Edit Properties
✏️	Change asset's ownership
▦	Variants ⌃
⊕	Assign variants
↻	Automatically fill tags
↺	Recreate Preview Images
🗑	Delete
♥	Add to my Favorites
📁	To Collection
★	Rate
👁	Subscribe
🔗	Copy asset link
⬇	Download/E-Mail ⌃
💾	Save
✉	Send as e-mail
☁	Publishing Channels
🛒	Create shop item
💼	Create Job
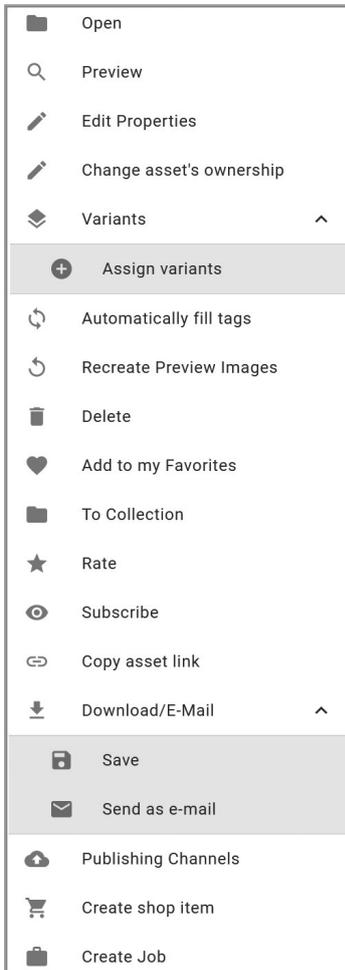
Opening the ⋮ Menu

The ⋮ menu appears for each asset in the search results.

1. Click ⋮.

2. Optional: In the case of a multiple selection by selecting the checkboxes of individual assets in the search, or a range selection by $\boxed{\text{SHIFT}}$-clicking on the first and last assets in the desired range, the $\boxed{\text{MENU...}}$ button appears above the search results.

   The menu with the asset editing and management functions opens.

3. Select the desired function to make changes.

You have edited one or more assets.

Prerequisites

Your authorizations determine which functions you can call using a Menu button.

Details Area

Function	Description
Open	Open the detailed view of the selected assets.
Preview	This opens a large preview image in a pop-up window.
View assets	Note: This can be executed only as a mass action for multiple selected assets via the `MENU` button. This opens a larger preview image in a pop-up window. You can leaf through the selected assets.

Editing

Function	Description
Delete	This moves the asset to the Recycle bin. The asset is not permanently deleted, but can now only be found if the *Recycle bin* checkbox is activated in the advanced search. If an asset is sent by e-mail (download link) and is then deleted, you can still access it via the link until the end of its validity.
Edit Properties	This opens a dialog box in which you can manage the properties.
Edit assets one by one	Note: This can be executed only as a mass action for multiple selected assets. This opens a dialog box in which you can manage the properties. You can use the page up symbol to switch to the next asset.
Edit all assets at once	Note: This can be executed only as a mass action for multiple selected assets. You can edit the properties of all the selected assets in a pop-up window.

Function	Description
Change assets ownership or Change asset's ownership	The command *Change asset's ownership* is available on the individual asset in the search. This function can be accessed in a multiple selection for batch processing via > $\boxed{\text{MENU...}}$ > *Edit* > *Change assets ownership*. This opens a window in which you can assign a new owner to one or more assets. Note: This option is available to the owner of the asset and to users who have the *Change Asset Owner* permission.
Assign variants	You can group assets that are related to each other in terms of content (such as image series or identical images in different colors) as variants.
Transfer variants	Note: Only if variants have already been assigned to the asset. You can open a new search in a pop-up window and define a new leading media object (master object) for existing variants of the selected media object.
Unassign variants	Note: Only if variants have already been assigned to the asset. This removes all variants added to the asset.
Recreate Preview Images	Note: Only available via the ⋮ menu. This allows you to update the preview image of the selected asset. Note: If you trigger this function for video files, the content of the *Remarks* field and the comments for the original file are overwritten.

Favorites and *Collections* Area

Function	Description
Add to my favorites	This flags the selected asset as a favorite.
Remove from My Favorites	This removes the selected asset from your favorites list.
To Collection	This opens a pop-up window in which you can select the collection to which you want to add the selected asset.
Rate	You can award between 1 and 5 stars for the asset. You can use the average rating (average number of stars) as search criteria.

Function	Description
Subscribe	This allows you to subscribe to the asset. You are then informed automatically about changes to the properties, version changes, downloads, or if the asset is deleted.
Delete subscription	You can delete the asset from your subscriptions.

Download/E-mail in Collections Area

Most of these commands are also available in the $\boxed{\text{MENU...}}$ button for mass actions or in the ⋮ menu in the hit list.

Function	Description
Save	This opens the *Asset download* dialog box where you can save the asset locally.
Save with linked images	Note: This can be executed only for InDesign files (INDD and IDML). This opens the *Asset download* dialog box where you can download the selected asset, including the used images.
Send as e-mail	This opens the *Send as e-mail* dialog box and you can send the selected asset as attachment or link.
Sending as an e-mail with linked images	Note: This can be executed only for InDesign files with linked images. This opens the *Send as e-mail* dialog box. The selected asset is sent in the e-mail as a link. The recipient of the e-mail can download the asset with all linked images using the link.
E-mail to subscribers	This opens a pop-up window in which you can send an e-mail to all the subscribers to the asset. This command appears context-sensitive only for assets that are subscribed to by someone.

Publishing Channels Area

> 📋 **Note:**
>
> It is not intended to publish assets from a collection.

Function	Description
Publishing Channels	This opens a pop-up window in which you define the output channel under which the asset is published. You also specify the publication period.
Publish	You publish the asset immediately and initially without a time limit.
Edit	This opens a pop-up window in which you can edit the publication period of the asset.
Unpublish	You stop the publication of the asset.

Export Area

> 📋 **Note:**
>
> These options are visible in the `MENU...` button for bulk actions, but have no function any longer.

Other Area in *> Collections*

Function	Description
Apply for license extension	This opens the *License extension* dialog window, in which you can request a license extension for the selected asset.
Open document	Note: Can be executed only for InDesign documents with Adobe InDesign up to and including Version CS 6. This opens a pop-up window that you can use to copy the name of the asset to the clipboard and transfer it to the InDesign Extension.
Create shop item	This opens the *> Edit item* page in the Marketing Shop module, in which you can create the selected asset as an item.
Create Job	This opens the *Create Job* dialog window. You can select a job type to create a new job.

Function	Description
Adapt to your own requirements	Note: This can be executed only for InDesign documents that have been finalized in the Brand Template Builder module and published in the *Media Pool* module . This opens the InDesign document in Brand Template Builder and you can adapt it there. The adapted document can also be published in the *Media Pool* module again.

Menu Text Button in the > *Collections* Area

Function	Description
Forward as e-mail	This opens the *Send as e-mail* dialog box. Select a rendering scheme. A link to the asset included in the collection is sent in the e-mail.
Create collection	This creates a new collection
Transfer collection	This transfers the selected collection to a different user.
Edit Collection	You can rename the collection or add a language variant for the name.
To Collection	This opens a pop-up window in which you can assign the selected asset to a different collection.
Delete from Collection	This removes the selected asset from the collection.
Edit total collection	This opens the *Edit asset data* dialog box. You can edit the properties of all the assets included in the collection.
Save Collection	This opens the *Asset download* dialog box. Select a rendering scheme to use to download the assets included in the collection.

6.2 Management of the Asset Attributes

Using the attributes, you define information for and about the asset. Some attributes can be created and maintained for the system languages. An overview of all attributes is available in *Asset Attributes on page 228*.

View

An overview of the attributes of an asset is available in the *Detailed View on page 34*. Each asset has a detailed view that displays the attributes, such as the file format, file size, versions of the asset, owner, or asset ID.

> **Note**
>
> The detailed view is adapted for each system. The attributes which are displayed in your system will depend on the adjustments which have been made. If you have any questions, please contact your system administrator.

Editing

You edit the attributes in the *Dialog Box for Editing the Attributes on page 38*.

Associated Tasks

- *Opening the Detailed View below*
- *Editing the Attributes of an Asset on the facing page*
- *Editing the Attributes of Several Assets Simultaneously on page 134*
- *Change Asset's Ownership on page 137*
- *Alternative Preview Image on page 138*

6.2.1 Opening the Detailed View

1. Navigate to > *Assets* > *Search*.

2. Search for the asset whose detailed view you want to open.

3. Click on the individual search result ⋮ > *Edit Properties*.

4. Optional: Click on the preview image in the search results.

The detailed view will open.

6.2.2 Editing the Attributes of an Asset

1. Search for the asset whose attributes you want to edit.

2. Click ⋮ > *Edit Properties* on the asset.

   The detailed view opens.

3. Enter the required information in the input fields.

4. Click *Apply*.

The attribute has been saved. Please note: If the asset is assigned to a VDB that requires approval, you require approval to ensure that the asset and its saved attributes are made available in the *Media Pool* module.

> **Note**
>
> The file naming conventions for the attribute fields *Asset name* and *File name* are as follows:
>
> - Maximum of 255 characters
>
> The *File name* entry must not:
>
> - Begin with a period (.) or hyphen (-)
> - End with a period (.)
>
> Even if they are allowed in your local file system, avoid these characters in the *File name* field:
> ```
> / \ ™ $ ® , ! ; : " * ? < >
> ```
>
> If a file with such characters in its name is uploaded, it will not be blocked. However, you will need to correct the file name when you edit the mandatory attributes.

6.2.3 Editing the Attributes of Multiple Assets One After the Other

When you edit assets one at a time, a progress bar is displayed in the top right of the edit dialog. The progress bar displays the following information:

- Name of the asset that is currently being edited,

- How many assets have already been edited and the total number of selected assets. For example: 1/10

Each asset can be edited individually; by clicking on *Save and next* the current asset is saved and the next one is automatically displayed.

> **Attention! Data loss!**
>
> You can also switch between the individual assets using the navigation arrows < and > next to the asset name. Please note that values entered in this way are not saved! They are only saved when you click *Save and next*.

Editing the Attributes of Multiple Assets One After the Other

1. Search for the assets that you want to edit simultaneously.

2. Select the assets by clicking ⊕ in order to activate the checkbox on each asset.

3. Optional: To select an asset selection between A and B, hold down the `SHIFT` key and click on the first asset and the last asset in the range. You can also scroll down to create a larger selection.

4. Above the asset search, select the top `MENU...` button, click > *Edit* > *Edit all assets at once*. The dialog box for editing the attributes opens for the first attribute.

5. Edit the attributes.

6. Click *Save and next*.

7. Repeat steps 4 to 5 until the attributes of all selected assets are completed.

You have edited the assets.

6.2.4   Editing the Attributes of Several Assets Simultaneously

To edit asset attributes efficiently, you can edit the attributes of multiple assets simultaneously. Note the special features with this function.

> **Note**
>
> Note that you can only edit assets of the same asset type at the same time. If you select assets of different types for simultaneous editing, you can call up the different asset types one after the other in the editing dialog box and edit the respective assigned assets simultaneously.

Changing Attributes

When editing multiple assets simultaneously, you can change attributes as follows:

1. For attributes with a value, the previously stored value is replaced, e.g. the VDB for all assets is changed to the new value.

2. For attributes with several values, the existing entries are supplemented by the newly added ones, e.g. the existing keywords are supplemented by the newly entered ones.

3. For special attributes such as the categories or the stored countries, existing attributes can be both added or removed.

When editing assets at the same time, the current values are not shown. Only the currently stored asset type is shown. In order to add or change individual values during mass editing, corresponding entries are required. As long as no values have been changed for an attribute, the attributes stored for the individual assets are not changed either.

Special Feature Boolean Attributes

For Boolean attributes, either the value TRUE or FALSE is stored. In order not to change the initial status of the stored attributes, an additional status is therefore displayed for a Boolean attribute to signal that the currently stored values are not to be changed. If the value is to be changed for all assets, the user selects whether the value TRUE or FALSE is to apply everywhere.

Edit Mandatory Attributes

The mandatory attributes are marked with an asterisk (*) in the user interface. You edit the mandatory attributes in mass editing in two situations:

1. You want these attributes to receive the same value in all of the selected assets.

2. These attributes have not been filled yet. Exceptions are the mandatory fields *Asset name* and *Categories*. *Asset name* is always prefilled and *Categories* may be prefilled. Therefore, editing is not always required.

Keywords, Categories and Relevant Countries Attributes

The *Keywords*, *Categories,* and *Relevant countries* fields are lists that can contain a different selection for each asset. To ensure that this selection is not overwritten completely, select which entries are added and which are removed individually:
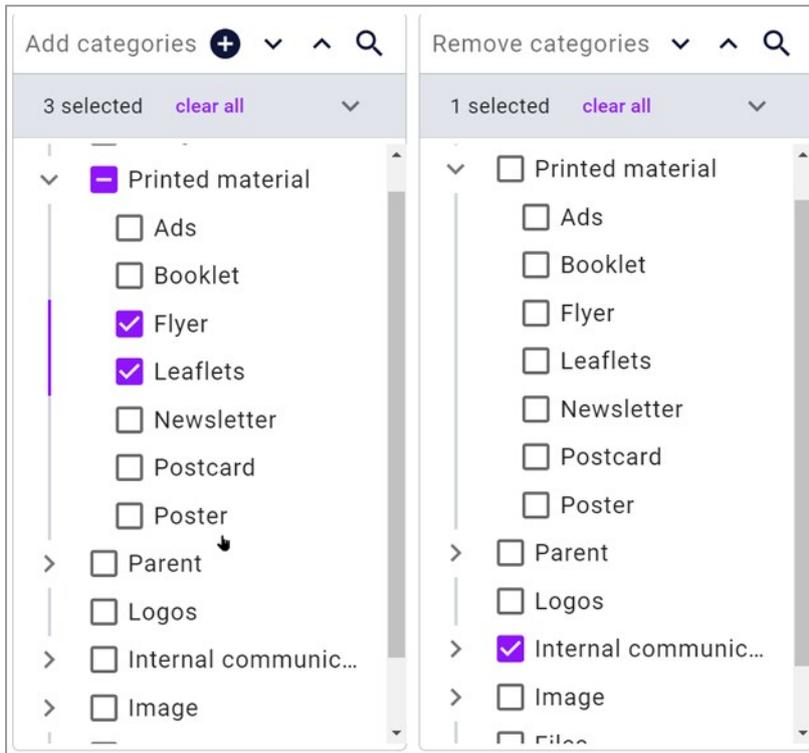
In the example in the screen shot, the categories */Printed Material/Flyer* and */Printed Material/Leaflets* have been added to all of the selected assets. If the category */Internal Communications* was added to the assets before, it will be removed. Other assigned categories remain unchanged.

File Name Attribute

Please note that the content of the field *File name* cannot be changed as part of mass processing.

Editing the Attributes of Several Assets Simultaneously

1. Search for the assets that you want to edit simultaneously.

2. Select the assets by clicking ⊕ in order to activate the checkbox on each asset.

3. Optional: To select an asset selection between A and B, hold down the `SHIFT` key and click on the first asset and the last asset in the range. You can also scroll down to create a larger selection.

4. Above the asset search, select the top `MENU...` button, click > *Edit* > *Edit all assets at once*.

   The dialog box for editing the attributes opens.

5. Edit the attributes.

6. Click *Save and close* or *Save and next*.

You have edited the attributes of several assets simultaneously. The changed attributes now have the same value for all these assets.

6.2.5 Change Asset's Ownership

To better distribute the workload, you can change the asset owner. The owner is responsible for an asset and processes requests for asset approval, among other things.

Change Single Asset's Ownership

1. Search for the asset.

   You can use the ⁝ menu in the toolbar to access additional functions for each match in the search result.

2. Click ⁝> *Change asset's ownership*.

   This will display the *Change assets ownership* dialog. Note: This option is available to the owner of the asset as well as to users with the *Change Asset Owner* permission.

3. In the *Select owner* field, type the name of the user to whom you want to transfer ownership of the asset.

   When you have entered the first three letters of the search term, matching name suggestions are listed.

4. Select a user as new owner.

5. Click *Save*.

The selected user is now the new owner of the asset. For more information, see *Owner* on page 27.

Change Multiple Asset's Ownership

1. Search for the assets you need.

2. Select the checkbox for each asset in the search results, or hold down the `SHIFT` key to select a range between Asset A and Asset B.

   The number of selected entries and a `MENU...` button are displayed above the hit list.

3. Click > `MENU......` > *Edit* > *Change assets ownership*.

   This will display the *Change assets ownership* dialog. Note: This option is available to the owner of the asset as well as to users with the *Change Asset Owner* permission.

4. In the *Select owner* field, type the name of the user to whom you want to transfer ownership of the marked assets.

   When you have entered the first three letters of the search term, matching name suggestions are listed.

5. Select a user as new owner.

6. Click *Save*.

The selected user is now the new owner of the asset selection. For more information, see *Owner* on page 27.

6.2.6 Alternative Preview Image

In certain scenarios, such as video content, automatically generated previews may not capture the best image or moment. By manually selecting an alternative preview or creating a custom preview, you can better showcase the asset. You can define an alternative preview image for the asset instead of the automatically generated preview image.

> **Note**
>
> For optimal display, the alternative preview image should have at least the following dimensions 60 × 60 pixels. If the image is smaller, it is automatically upscaled , which may result in a loss of quality.

Specify Alternative Preview Image

1. Select the asset for which you want to define an alternative preview image.

2. Click the ⋮ menu and select *Edit Properties*.

   This opens a dialog box in which you can edit the attributes.

3. Click the button *Show excluded attributes*.

4. Scroll down to the *Alternative preview image* entry.

5. To select an alternative preview image, you have two options:

   ○ Click *Add asset*.

     This opens the asset search for *Alternative asset preview* in which you can search for the asset that you want to use as the secondary preview image.

   ○ Drag a locally saved image file into the dotted outlined area to upload it as an alternative preview image.

6. Click *Apply*.

In the future, search results will use the alternate preview image instead of the original asset preview.

6.3 Versions

As a result of improvements, corrections, or revisions, there may be several versions of an asset. You can use versions in the module *Media Pool* to map the successive or different conditions of an asset.
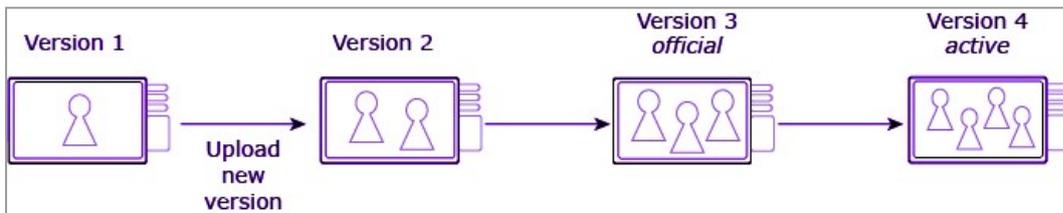
How it Works:

You can version an asset or version multiple assets automatically in mass versioning. Note the requirements for mass versioning in Versioning multiple assets simultaneously. There is no restriction on the number of versions.

When you create a version, only the preview images are regenerated and technical attributes such as the size and resolution are overwritten. Other attributes such as the asset name or tags are not changed.

The latest version of an asset is automatically the active version. For a version to become the official version, a user must flag it as official. There can only ever be one official version.

> **Note**
>
> The file format of the asset must be approved for publication in order to mark a version as official. If you have any questions, please contact your system administrator.

You can only delete versions that are not flagged as official.

The asset attributes for the new version are transferred from the previous version. You can use the *Edit Properties* function to edit the attributes of the new version.

> **Note**
>
> When you upload a new version, the system uses a unique cryptographic MD5 checksum verification of the file content to check whether this file is already in Media Pool.

Usage

The active version is used and displayed in the *Media Pool* module. In the *Job Manager*, *Marketing Data Hub*, *Review Manager*, and *Brand Template Builder* modules, the active version is used. The *Marketing Shop* module uses the official version.

Notes for InDesign Documents

When working with InDesign documents with linked images, you must note the following:

- When a new version of the InDesign document is uploaded, any linked images are lost.

- When a new image version is uploaded, the link references the original image version.

Associated Tasks

- *Versioning an Asset* on the next page

- *Versioning Several Assets Simultaneously* on page 143

- *Flagging a Version as Official* on page 146

- *Downloading a Version* on page 147

- *Deleting a Version* on page 147

View

You can access the versions and their corresponding information in the detailed view. The versions are listed on the *Versions* tab. The newest version is at the top of the list. A preview image and the following information are displayed for each version:

- Version: Version number

- Creator: The user that uploaded the version

- Upload date: Date and time at which the version was uploaded

- Comment: The text that you saved as the version comment while uploading.

The ✅ icon indicates the official version.

Functions

You can use the following functions for versions:

Icon	Description
⬇	This saves the original file of the version.
⊘	This selects the version as the official version of the asset. Only one version can be marked as *official*. For the official version, the icon changes to ✅.
📄PDF	This saves a document asset in PDF format.
🗑	This deletes the version of the asset. If the version cannot be deleted because it is official, the icon is grayed out.
+ Upload new version	This creates a new version, for which you can upload a new file.
Official versions history	This opens a list that shows when which version was official.
Published versions history	This opens a list that shows when which version was published.

6.3.1 Versioning an Asset

To upload a new version of an asset, follow these steps:

1. Open the detailed view of the asset via ⋮ > *Edit Properties*.

   The detailed view opens.

2. Click the *Versions* tab and click '+ *Upload new version*.

3. In the pop-up window, select a locally saved file that you want to upload as the new version. Alternatively, you can drag and drop the file into the upload area.

4. Optionally, add a *Comment* providing information about the new version.

5. Click *Upload*.

The file will be uploaded and created as a new version of the asset. The new version is not auto-matically activated. See *Flagging a Version as Official* on page 146.

6.3.2 Versioning Several Assets Simultaneously

Automatic Matching

To automatically assign the new versions to the created assets, you can choose between three methods:

- Matching file name: The file name of the asset to which a version is to be added matches the file name of the new version.

- Asset ID: The ID of the asset to which a version is to be added is part of the file name of the new version. You can choose whether the asset ID is at the start (as a prefix) or end (as a suffix) of the version file name. You can also choose the separator with which the asset ID is separated from the rest of the file name, such as a period (.) or hyphen (-).

> EXAMPLE
>
> You want to carry out the assignment using the asset ID as a prefix. You want to separate the asset ID from the rest of the file name with a hyphen. To assign a version to the asset with the asset ID M-2456, the file name for the version must correspond to the following structure: M-2456-*Name.Format*.

- Item number: The item number of the asset to which a version is to be added is part of the file name of the new version. You can choose whether the item number is at the start (as a prefix) or end (as a suffix) of the version file name. You can also choose the separator with which the item number is separated from the rest of the file name, such as a period (.) or hyphen (-).

> EXAMPLE
>
> You want to carry out the assignment using the item number as a suffix. You want to separate the item number from the rest of the file name with a period. To assign a version to the asset with the item number 123456, the file name for the version must correspond to the following structure: *Name*.123456.*Format*.

Note that you can use only one method in the mass versioning.

Prerequisites

You have standardized the names of the files that are created as versions and the attributes of the assets that are to be versioned to an assignment method.

Creating Several Versions Simultaneously

Click > *Assets* > *Import*.

1. Add the new versions to the import by dragging files from the local disk into the window or click the *Import* button and use the *Browse* button.

2. Enter a name for the import folder in the field *Folder Name* .

3. Click *Start*.

   The files are uploaded to the import folder.

4. Once the upload is complete, click *To Import*.

5. To version them all, click :*More functions > Mass versioning of assets*

   a. Optional: To version a selection, select a range of assets by holding down the SHIFT key and clicking the (+) icon for the first and last asset, or click the (+) icon for individual assets.

      At the bottom left, *Edit* is displayed.

   b. Click (*Edit* or the pencil icon) and select *Mass versioning of assets*.

   c. Optional: If you are in the import overview with all import folders, you can access the command *Mass versioning of assets* via the ... menu on the right.

6. The *Mass versioning of assets* wizard is loaded.
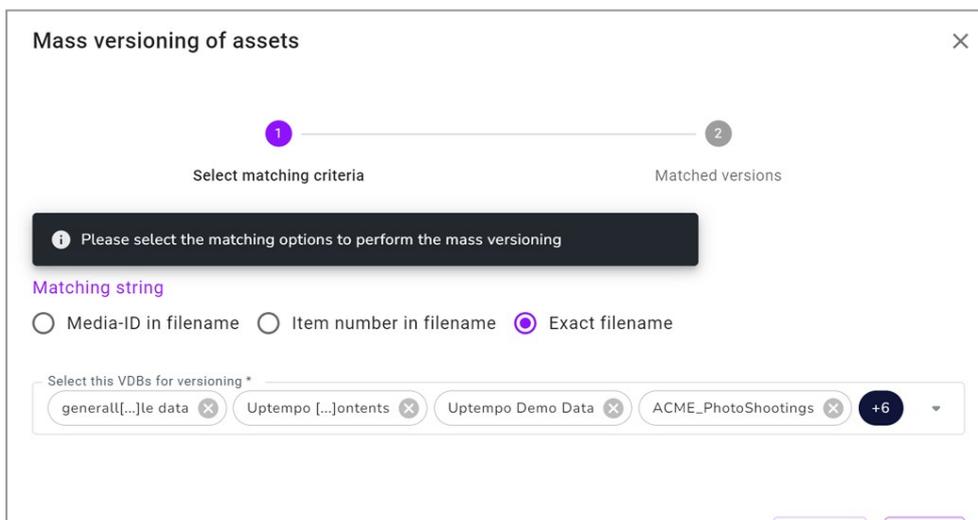
7. On the *Select matching criteria* page select the matching options to perform the mass versioning.

8. Click *Apply*.

   You start the mass versioning process.

9. Once the process is complete, the results, or assets found and matched, are listed on the next page, titled *Matched versions*.
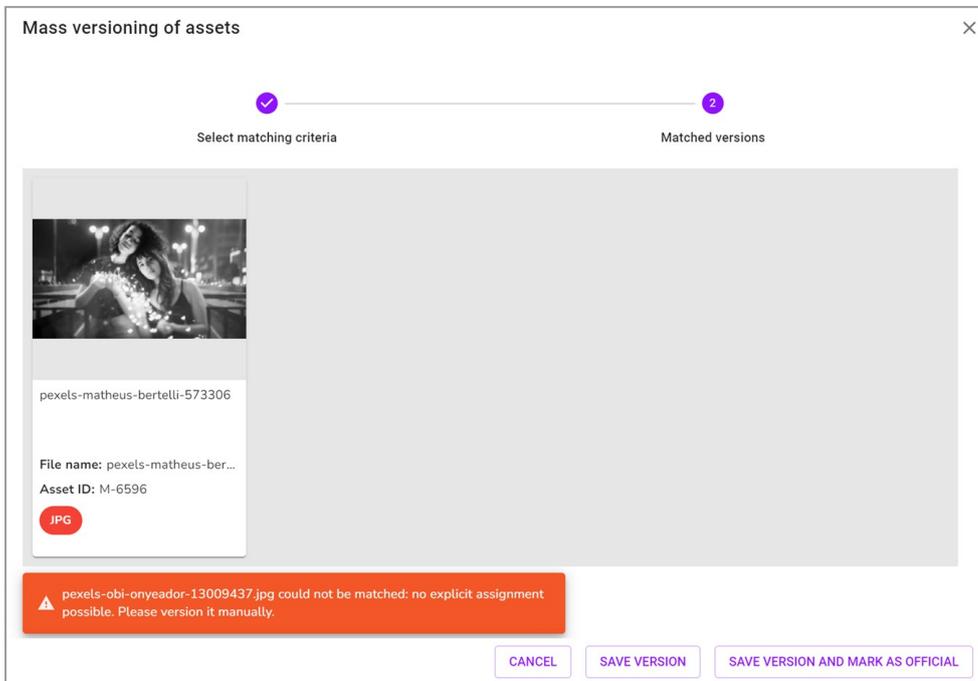
10. Activate the *Select mass-version matches* checkbox to select all files that could be assigned to an existing asset.

11. Click *Save version*.

- Optional: To mark the new version as the current one, click the button *Save version and mark as official*.

You have created and saved the uploaded files as a new version of the assets. You can call up the versions of an asset via the detailed view. You can display the log of the import folder to view the list of successfully versioned assets.
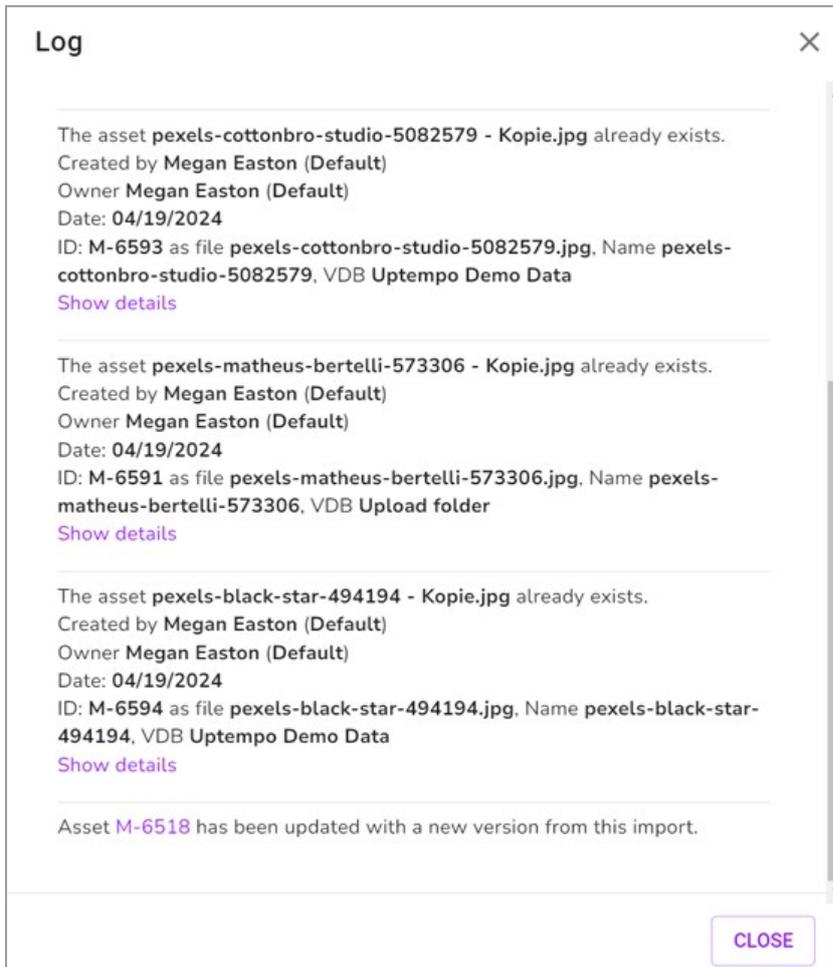
6.3.3 Flagging a Version as Official

After uploading, you must flag the newly uploaded version as official.

1. Open the detailed view of the assets whose versions you want to edit.

2. Go to the *Versions* tab.

3. For the version that you want to select, choose the ⊘ button.

The version flagged with ✓ is the official version of the asset.

6.3.4 Downloading a Version

1. Open the detailed view of the asset whose version you want to download.

2. Go to the *Versions* tab.

3. For the desired version, click the symbol ⬇.

   The system dialog for saving a file opens.

4. Select a destination folder and click *Save*.

The file is downloaded to your computer.

6.3.5 Deleting a Version

> Caution! Loss of data!
>
> You cannot undo the deletion of versions!

1. Open the detailed view of the asset of which you want to delete one or more versions.

2. Go to the *Versions* tab.

3. Click the Recycle bin icon for the desired version.

   A confirmation prompt opens.

4. Click *Delete*.

The version has been deleted permanently.

6.4 Review

You can use the *Review Manager* module to start an asset check.

Prerequisite

The *Review Manager* module must be activated in your system. If you have any questions, please contact your system administrator.

Starting a review

You upload an asset to a datasheet in the Job Manager using the Asset Selector field function. Users with the appropriate permissions in their role can vote or start a detailed review in the Review Manager.

You have started the check of the asset.

Further information

For more information, see the Review Manager online help.

6.5 Revisions

You can use the Job Manager module to create a job for an asset (for example, to request an image correction or re-edit for a required image) quickly and easily.

Prerequisite

- The Job Manager module must be activated.

- You require permissions in the Job Manager module.

- A job type with the required variable fields and workflows has been created.

Starting a Revision

1. Locate the asset for which you want to start a revision.

2. In the search results click ⋮ > *Create Job* at the asset.

   The dialog box *Create Job* opens.

3. Enter the name of the new job in the input field, select an appropriate job type and confirm with *Add*.

   The job data sheet is created and opened.

4. Enter all the required information in the datasheet.

5. When you have entered all information for your job, click *Save*.

6. Click the close button ✕ to return to the asset search.

The job is now listed in the job overview in the Job Manager module and can be edited from there. You can call the job from the Job Manager module.

Further Information

For more information, see the Online Help Portal.

6.6 Deleting

You can delete assets which are outdated or no longer required and move them to the Recycle Bin. The asset is not permanently deleted, but can now only be found if the *In Recycle Bin* checkbox is activated in the search in the *Asset Management* widget. If an asset is sent by e-mail (download link) and is then deleted, you can still access it via the link until the end of its validity.

> **Note**
>
> If you delete an asset that is currently published via one of the publication channels, the asset is automatically unpublished from all publication channels.

Notes for InDesign documents

When working with InDesign documents with linked images, you must note the following:

- When a linked image is deleted, the link still remains.

- When you delete an image for which the image version linked in the InDesign document is available, the link still remains.

- When you delete an image version that is linked in an InDesign document, the link is canceled.

Moving an Asset to the Recycle Bin

1. Search for the asset that you want to delete.

2. Click ⋮> *Delete* on the asset.

   A confirmation prompt is displayed.

3. Click *Delete*.

You have moved the asset to the Recycle bin.

Deleting Assets in a Collection

A collection may also contain assets that cannot be found via the regular search. For example, it is possible to add local files as assets to a job and start a review. These assets then appear in the *Own DSE Pictures* collection, but not automatically in an asset search.

When users attempt to delete assets in a collection, such as a *Own DSE Pictures*, a confirmation prompt is displayed. This is to prevent accidental deletion of assets that may be used in jobs or reviews.

The confirmation dialog indicates that removing the asset may affect other users. The user must therefore explicitly confirm the deletion before the asset is removed.

This prevents other users from unexpectedly no longer having access to required content they are working on.

6.7 Restoring

You can restore assets that were moved to the recycle bin.

Restoring an Asset

1. Search for the asset in the recycle bin: In the *Asset Management* widget, activate the *In Recycle Bin* checkbox.

2. Click > ⋮> *Edit Properties* on the asset*.*

   This opens a new dialog box.

3. In the *Virtual DB* field, select a virtual database (VDB).

4. Optional: Edit other attributes.

5. Click *Apply*.

The asset is stored in the selected VDB and can be accessed there by all users with the appropriate access permissions.

7

Arranging and Organizing

In addition to the extensive and convenient search options, you can arrange and organize assets individually. In *Media Pool* various functions are available to help you do this.

Favorites

You can access assets which you flag as favorites using > *Assets* > *Collections* > *My Favorites*. For more information, see *Favorites* on page 156.

Collection

You can group various assets in a collection and make the collection available to other users. An example of this would be a collection of images for a campaign. You can also use the collection to make assets available to users who would otherwise not have access to the assets. This is the case, for example, if the asset is stored in a VDB for which a different user does not have access.

For more information, see *Collections* on page 157.

Rating

If the function is activated in your system, you can rate assets (1 to 5 stars) and leave comments. You can use the average rating of an asset as search criteria. The number of stars is displayed directly from the preview image of an asset.

For more information, see *Rating* on page 165.

Subscription

Subscriptions allow you to track changes to assets.

For more information, see *Subscription* on page 167.

Variants

To group together assets with identical content, such as images in a series, different languages, or different colors, you can create the assets as variants of a leading asset. This lets you structure assets and mark them as belonging to each other. Only the master asset is displayed in search results. You can access all the variants quickly and easily using the detailed view of the master asset. If an alternative preview image has been assigned to an asset, it will be displayed in the *Variants* tab. For more information, see *Variants* on page 169.

Related Assets

You can flag assets that belong together as related to each other. You can also define the type of relationship in the attributes. For more information, see *Related Assets* on page 174.

7.1 Favorites

You can access assets that you mark as favorites quickly by choosing > *Media Pool* > *Collections* > *My Favorites*. You can see whether an asset is marked as a favorite in the top line of its detailed view:

- 🖤: The asset is not a favorite.

- 💜: The asset is marked as a favorite.

Associated Tasks

- *Flagging an Asset as a Favorite* below

- *Removing an Asset From a Favorite List* below

7.1.1 Flagging an Asset as a Favorite

- Search for the asset that you want to flag as a favorite.

- On the asset or in detailed view click > ⋮ > *Add to my Favorites*.

The selected asset is then selected as a favorite. Click > *Assets* > *Collections* > *My Favorites* to display the asset together with your other favorites.

Alternatively, you can also mark the asset as a favorite in its detailed view. To do so, click 🖤 in the top line in the detailed view. The asset is then added to your favorites. The icon changes to 💜.

7.1.2 Removing an Asset From a Favorite List

- Click > *Assets* > *Collections* > *My Favorites*.

- Click the MENU button of the asset that you want to remove from the favorites list.

- Choose *Remove from My Favorites*.

The selected asset is then removed from the favorites list.

Alternatively, you can also delete the asset from your favorites in its detailed view. To do so, click 💜 in the top line in the detailed view. The asset is then deleted from your favorites. The icon changes to 🖤.

7.2 Collections

You can group various assets in a collection and make the collection available to other users. An example of this would be a collection of images for a campaign. You can also use the collection to make assets available to users who would otherwise not have access to the assets. This is the case, for example, if the asset is stored in a VDB for which a different user does not have access. Collections in combination with approvals can be used to provide different target groups (e.g. marketing department, sales, field service) in a company with the required assets.

A collection may also contain files that cannot yet be accessed by other users. For example, you can upload images that are saved locally to the *My images* collection and store them in your own section within the *Media Pool* module. Note that these files are still subject to the duplicate check: If a file is saved by different users in their own areas, the file is displayed in their own areas. However, the file in question is the same file. Changes made by a user are available for all other users that have stored this file.

Associated Tasks

- *Creating a Collection* on page 159

- *Assigning an Asset to a Collection* on page 159

- *Assigning Several Assets to a Collection* on page 160

- *E-Mailing a Collection* on page 160
  You can send a collection via e-mail. When you do so, a link to the assets in the collection is provided in the e-mail. For example, you can send images to recipients who do not have access to the *Media Pool* module.

- *Sharing a Collection* on page 161
  You can share a collection to make it available to a group of users. The group can either contain all users of the module *Media Pool* or be restricted to users in organizational units, a distribution list or a group you specify. A shared collection is displayed *under> Assets > Collections > Shared collections*. Only the owner can edit the collection.

- *Forwarding a Collection* on page 162
   If you use the *Transfer collection* function, the collection is copied and created for each recipient in their *> Assets > Collections > My Collections* section. Each recipient can edit the collection, send it by e-mail, or share it as if they had created it themselves. You can enter users or distributor lists as recipients.

Uploading Locally Stored Images

You can upload locally saved data to the *Own Administration Pictures*, *Own DSE Pictures*, *Own Smart Access Pictures*, *Own Brand Template Builder Pictures* and *My Reviews* areas. The files are not assigned to a VDB and cannot be found in the *Media Pool* module. To create an uploaded file as an asset, you must first complete the asset attributes. Note: If a different user uploads the same file and completes the asset attributes, the file can automatically be accessed in the *Media Pool* module.

For more information, see .

Standard Collections

The following areas are created automatically by default:

- Shared Collections: You can share your own collections with other users. Using the *Share collection* function, you can move one of your collections to the *Shared Collections* section.

- My Collections: You can assign individual assets to this collection. You can create further sub-collections.

- Own Administration pictures: All the images that you have uploaded for the *Administration* section are assigned to this section. For example, this section contains images that you have assigned to a changeable object or assigned as an alternative preview image. These images are not automatically transferred to the module *Media Pool* because they are not assigned to a virtual database. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

- Own DSE Pictures: All images that you upload in the *Job Manager* and *Marketing Data Hub* modules are assigned to this section. You can upload images that are saved locally. These images are not automatically transferred to the module *Media Pool* because they are not assigned to a virtual database. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

- Own Smart Access Pictures: All the images that you upload in the *Smart Access* module are assigned to this section. You can upload images that are saved locally. These images are not automatically transferred to the module *Media Pool* because they are not assigned to a virtual database. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

- Own Brand Template Builder Pictures: All the images that you upload when you use the *Brand Template Builder* module to customize advertising material are assigned to this section. You can upload images that are saved locally. These images are not automatically transferred to

the module *Media Pool* because they are not assigned to a virtual database. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

- My Reviews: All of the files for which you start a review in the *Review Manager* module are assigned to this section. You can upload images that are saved locally. These images are not automatically transferred to the module *Media Pool* because they are not assigned to a virtual database. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

7.2.1 Creating a Collection

1. Click > *Assets* > *Collections* > *My Collections*.

    This displays the existing collections.

2. Click MENU... to access the function *Create collection*.

    This opens a new dialog box.

3. Enter the name of the new collection in the input field.

4. Click *Save*.

    The new collection is created. Once you have created the collection, you can assign assets.

5. Click > *Assets* > *Search*.

6. Open the ⋮ > *To Collection*. for the asset that you want to add to the collection.

    This opens a pop-up window that displays the collections that you have created.

7. Click the collection to which you want to assign the asset. You can display any existing sub-collections by clicking the (+) symbol.

8. Choose *Apply* to confirm your selection.

The asset is displayed in the new collection under > *Assets* > *Collections* > *My Collections*.

7.2.2 Assigning an Asset to a Collection

1. Search for the asset that you want to assign to a collection.

2. Click > ⋮ > *To Collection* on the search result or in detailed view.

    This opens a window that displays the collections that you have created.

3. Click the collection to which you want to assign the asset. You can display any existing sub-collections by clicking the Plus sign.

4. Choose *Apply*.

The asset is displayed in the selected collection under > *Assets* > *Collections* > *My Collections*.

7.2.3 Assigning Several Assets to a Collection

1. Search for the assets that you want to assign to a collection.

2. Check the box next to the assets that you would like to assign.

3. Click *Menu… > To Collection*.

   This opens a window that displays the collections that you have created.

4. Click the collection to which you want to assign the assets. You can display any existing sub-collections by clicking the Plus icon.

5. Click *Apply*.

The assets are displayed under > *Assets* > *Collections* > *My Collections* in the selected collection.

7.2.4 E-Mailing a Collection

You can send a collection via e-mail. When you do so, a link to the assets in the collection is provided in the e-mail. For example, you can send images to recipients who do not have access to the Media Pool module.

Prerequisites

You can only forward your own collections (collections that you have created). You cannot forward other sections, such as *Own Brand Template Builder Pictures*, by e-mail.

> **Note**
>
> Assets that require approval can only be sent via e-mail once the owner has approved them to be sent. Assets that require approval are provided with a watermark. You can request the approval directly in the *Send as e-mail* dialog box.

Sending a Collection as E-Mail

1. Click > *Assets* > *Collections* > *My Collections* and select a collection that you have created.

2. Click the MENU... button above the collection and choose *Forward as e-mail*.

   This opens a new dialog box.

3. Enter the information required to send the e-mail. Mandatory fields are marked with *. For more information, see *E-Mail Delivery* on page 198.

4. Click *Send as e-mail*.

   This creates a summary of specified information and message preview.

5. To send the finished e-mail, click *Send*.

You have sent the e-mail.

7.2.5   Sharing a Collection

You can share a collection to make it available to a group of users. The group can either include all of the users in the *Media Pool* or can be restricted to users in organizational units, a distribution list, or a group defined by you. A shared collection is displayed under > *Assets* > *Collections* > *My Collections*. Only the owner can edit the collection.

Settings

- *Name*: This input field is automatically prefilled with the name of the collection. You can rename the collection if required.

- *Validity*: Define the start and end date from and to which you want to publish the collection.

- *Visibility*: You can limit the visibility of or access to the shared collection to one organizational unit. Choose *Manage visibility* and select an organizational unit, user, or distribution list from the selection field. Only users who are either assigned to the organizational unit, entered directly, or included in the distribution list can access the collection. If you do not limit the visibility, the collection is made available without restrictions.

Sharing a Collection

1. Click > *Assets* > *Collections* > *My Collections* and select a collection that you have created.

2. Click the top MENU... button to access the *Share collection* function .

A dialog box opens.

3. Configure the necessary settings for the *Name*, *Validity*, and *Visibility* fields.

4. Click *Save* to save your entries.

The selected collection is moved to the *Shared Collections* folder.

7.2.6 Forwarding a Collection

If you use the *Transfer collection* function, the collection is copied and created for each recipient in their > *Assets* > *Collections* > *My Collections* area. Each recipient can edit the collection, send it by e-mail, or share it as if they had created it themselves. You can enter users or distributor lists as recipients.

Settings

- *Assets*: This lists the assets that are currently included in the collection.

- *User search*: You can search for other users to whom you want to forward the collection by last name, first name, or e-mail address.

- *Selected person:*: This lists the selected users to whom the collection is to be forwarded.

- *Comment:*: Enter a text that is forwarded with the system message.

Forward a Collection

1. Click > *Assets* > *Collections* > *My Collections* and select a collection that you have created.

2. Click the top MENU... button to access the *Share collection* function .

   A dialog box opens.

3. In the *Recipient* field select the users or distribution list to which you want to forward the collection.

4. Optional: Enter a comment.

5. Choose *Transfer collection*.

The recipients of the collection that you have forwarded will be notified through a system message. They can access the forwarded collection by clicking > *Assets* > *Collections*.

7.2.7 Upload of Locally Stored Images

You can upload locally saved data to the *Own Administration Pictures*, *Own DSE Pictures*, *Own Smart Access Pictures*, *Own Brand Template Builder Pictures* and *My Reviews* areas. The files are not assigned to a VDB and cannot be found in the *Media Pool* module. To create an uploaded file as an asset, you must first complete the asset attributes. Note: If a different user uploads the same file and completes the asset attributes, the file can automatically be accessed in the *Media Pool* module.

Uploading locally saved images

1. *Click > Assets > Collections*

2. Select one of the collections *Own Administration Pictures*, *Own DSE Pictures*, *Own Smart Access Pictures*, *Own Brand Template Builder Pictures* or *My My Reviews* by clicking on it.

3. Click *Browse* or click the input field.

   The file dialog box of your operating system opens.

4. Select a locally saved image file.

5. Click *Open* the file dialog box followed by *Save*.

The image is uploaded and saved in the selected collection.

> **Note**
>
> The uploaded images are not yet assigned to a VDB and thus cannot be found in the *Media Pool* module. After uploading the image, you can create it as an asset in the module *Media Pool* by editing the attributes.

Editing Functions

After you have uploaded one or more image files into a collection, you can access the following functions from the MENU... button below the collection:

Function	Description
View assets	This opens a dialog box in which you can view the assets.
Edit assets one by one	This opens a pop-up window in which you can edit the attributes of all the selected images.

Function	Description
Edit all assets at once	This opens a pop-up window in which you can edit the attributes of all the selected images.
Recreate Preview Images	This opens a dialog box in which you can regenerate the preview images.
Edit total collection	This opens a pop-up window in which you can edit the attributes of all the images included in the collection at the same time. Entries that you made previously are overwritten.

In an open collection, you can remove an individual image via the MENU… button on the image asset by using the functions *Delete from Collection* or click on it in conjunction with *Move to Collection*. Under the open collection, activate the *Select all* checkmark, to apply the above functions to all assets via the global MENU… button.

7.2.8 Deleting a Collection

1. Click > *Media* > *Collections* > *My Collections*.

2. Click on the name of the collection you wish to delete.

3. Select the function *Delete collections* by clicking the MENU… button above the collection. This opens a confirmation dialog.

4. Click *Yes*.

5. The selected collection is permanently deleted. Note: Deleting a collection does not delete the assets it contains. They can still be found via > *Assets* > *Search*

The deleted collection is no longer displayed under > *Assets* > *Collections* > *My Collections*.

7.3 Rating

If this feature is enabled in your system, you can rate assets (★ to ★ ★ ★ ★ ★ stars) and leave comments for the rating. You can use the average rating of an asset as search criteria.

Associated Tasks

- *Rating an Asset* below

- *Deleting a Rating* below

- *Search by Average Rating* on the next page

7.3.1 Rating an Asset

1. Search for the asset.

2. Click > ⋮ >*Rate*.

3. Click the desired number of stars.

   Example: ★ ★ ★ ☆ ☆ corresponds to a three-star rating.

4. Enter your comment in the *Your comment* text field.

5. Click *Create*.

Your rating is available immediately. Repeat the steps to edit and correct an existing rating.

Alternatively, you can open the detailed view in a search result. Click > ⋮ > *Rate*. Continue with step 3.

7.3.2 Deleting a Rating

Deleting Your Own Rating

1. For the asset whose rating you want to delete click > ⋮ > *Rate* in the hit list or in the detailed view.

   The dialog *Edit rating* opens.

2. Click *Delete*.

The stars that you entered and the comment about the rating are then removed. The average rating of the asset is re-determined automatically.

Deleting a Rating by Another User

1. Open the detailed view of the asset.

2. Go to the *Rating* tab.

   A list of all existing ratings is displayed.

3. Click the recycle bin icon to delete a rating.

The comment and the corresponding rating are deleted. The average rating of the asset is re-determined automatically.

7.3.3 Search by Average Rating

1. Click > *Media Pool* > *Search*.

2. Open the *Asset evaluation* widget.

3. Select the minimum number of stars that you want to search for from the list.

4. Click *Confirm*.

The search result shows assets with an average rating that is at least as high as the specified number.

7.4 Subscription

Subscriptions allow you to track changes to assets.

Changes and activities

- A system message informs you about these changes and activities:
- Changes to the attributes of the asset (including the name)
- A download of the asset
- A download of the original file for a version of the asset from the detailed view
- A download of the PDF file of a version of the asset from the detailed view
- Change of the version
- The deletion of the asset

Associated Tasks

- *Subscribing to an Asset* below
- *Opening a List of Your Subscribed Assets* below
- *Deleting a Subscription* on the next page

7.4.1 Subscribing to an Asset

- Search for the asset to which you want to subscribe.
- Use the ⋮ menu on the asset to access the *Subscribe* function.

You have subscribed to the asset.

7.4.2 Opening a List of Your Subscribed Assets

1. Click > *Assets* >Search
2. Open the widget *Asset Management* and set the checkbox for *In My Subscriptions*.
3. Click *Apply*.

The result of the search is a list of your subscribed assets.

7.4.3 Deleting a Subscription

1. Search for the asset whose subscription you want to delete, for example, by calling a list of your subscribed assets (see *Opening a List of Your Subscribed Assets* on the previous page).

2. Choose > ⋮ > *Delete subscription* on the asset.

You are no longer subscribed to the asset.

7.5 Variants

To group together assets with identical content such as images in a series, different languages, or different colors, you can create the assets as variants of a master asset. This lets you structure assets and mark them as belonging to each other. Only the master asset is displayed in search results. You can access all the variants quickly and easily using the detailed view of the master asset.

> **Note**
>
> During a search, assets that are marked as variants of a master asset are generally not listed. Variants can be found only if the option *Include variants* is activated in the *Asset Administration* widget while searching.

> **Note**
>
> The master media object and its variants can be assigned to different VDBs. You see only the variants whose VDB you can access.

Associated Tasks

- *Creating a Variant* below

- *Opening a Variant* on the next page

- *Unassigning Variants* on page 171

- *Transferring a Variant* on page 172, which means transferring a variant to a different master asset.

7.5.1 Creating a Variant

1. Search for the asset that you want to be the master asset.

2. On the search result, click > ⋮ > *Variants* > *Assign variants*.

A search dialog box opens.

3. Search for the assets that you want to create as variants.

4. For the assets that you want to create as variants of the master asset, activate the checkbox in the bottom right corner of the tile. An enabled checkbox is highlighted in color.

5. Click *Apply*.

You have created the assets as variants of the master asset.

Alternatively, you can also create variants in the detailed view of the master asset. Open the detailed view and click > Variants > ⊕. Continue with step 3.

Alternatively, you can also create variants in the detailed view of the leading asset. Open the detailed view ① and then ② click > *Variants* > ⊕. Proceed with step 3.
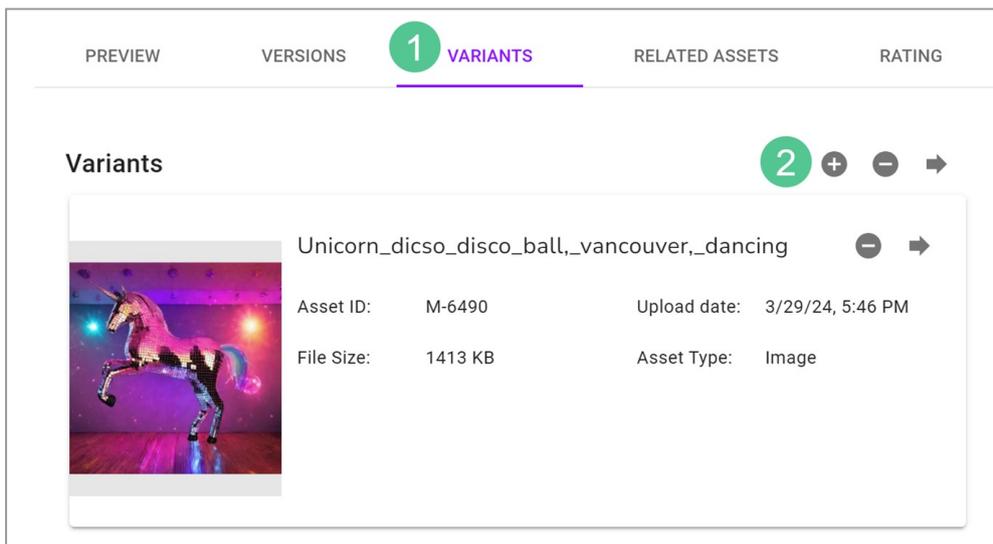
7.5.2 Opening a Variant

1. Open the detailed view of the master asset.

2. Go to the *Variants* tab.

A list of the existing variants of the asset is displayed.

> 📄 **Note**
>
> The master media object and its variants can be assigned to different VDBs. You see only the variants whose VDB you can access.

7.5.3 Unassigning Variants

Unassigning a Variant

1. Open the detailed view of the master asset.

2. Go to the *Variants* tab.

3. Next to the variant that you want to delete, choose ⊖.

   A confirmation prompt opens.

4. Click *Confirm*.

The asset is now no longer a variant.

Unassigning All Variants

1. Open the detailed view of the master asset.

2. Go to the *Variants* tab.

3. Click ⊖ above the list of variants.

   A confirmation prompt opens.

4. Choose *Confirm*.

All the variants are removed.

Alternatively, you can remove all variants from a search result without opening the detailed view and without visual inspection. Click > ⋮ > *Variants > Unassign variants*.

	Variants	^
⊕	Assign variants	
➡	Transfer variants	
⊖	Unassign variants 🖑	

Unassign variants
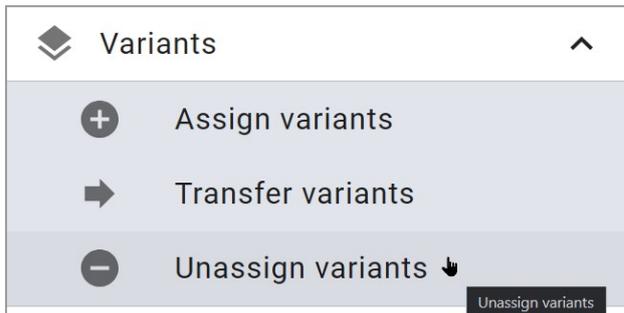
7.5.4 Transferring a Variant

Transferring a Variant

1. Open the detailed view of the master asset.

2. Go to the *Variants* tab.

3. Next to the variant that you want to transfer, choose ➡.

    The asset search is loaded.

4. Search for the asset that you want to select as the leading asset for the variant.

5. Select the new master asset by clicking the (+) sign in the search result.

    A confirmation message is displayed.

6. Close the detailed view.

The asset is now a variant of the second master asset.

Transferring all the Variants

1. Open the detailed view of the master asset.

2. Go to the *Variants* tab.

3. Click ➡ above the list of variants.

    The asset search is loaded.

4. Search for the asset that you want to select as the leading asset for the variants.

5. Select the new master asset by clicking the Plus sign in the search result.

    A confirmation message is displayed.

6. Close the detailed view.

The assets are now variants of the second master asset.

Alternatively, you can transfer all variants from a search result without opening the detailed view and without visual inspection. Click > ⋮ > *Variants* > *Transfer variants*
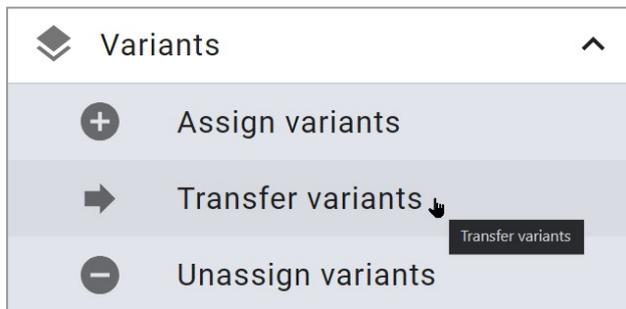
7.6 Related Assets

You can flag assets that belong together as related to each other. You can also define the type of relationship in the attributes. You can call up the related assets from the Detailed view. Click the *Related assets* tab.

Add Related Assets

1. Search for the asset to which you want to add related assets.

2. Open the detailed view of the asset, see *Opening the Detailed View* on page 132.

3. Switch to the *Related assets* tab.

4. Click the Plus symbol.

5. Click *Add asset*.

   The search is displayed.

6. Search for assets you want to add as related assets.

7. Select the checkbox for the assets you want to add.

8. Click *Apply*.

   The *Assign relations* dialog is displayed. The selected assets are shown in the dialog.

9. Optional: If necessary, repeat steps 5 through 8 to add more related assets. Note that these must be related assets with the same relationship type.

10. Click *Next*.

    You are now in step *Define relation*. A drop-down list is displayed.

11. Define the type of relationship:

    ◦ Select an existing entry in the alphabetically sorted list. When you click the *Define relation* drop-down list, a search field is displayed. Enter a keyword to search or filter the entries.

    ◦ If you do not find a suitable entry, enter the desired name in the search field. Press the ⏎ key. You have defined a new relationship type.

12. When you have specified a relationship, click *Next*.

    You are now in step *Confirm*. The dialog displays the selected assets with the selected relationship type.

13. Click *Apply*.
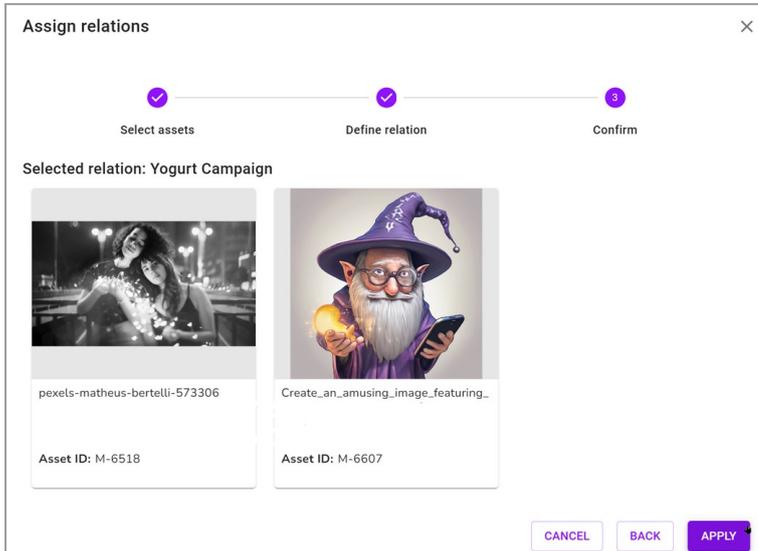
The selected assets are displayed as related assets with the selected relationship type.

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Protecting
Assets

8

Protecting assets involves a number of different tasks. You may want to ensure that only high-quality assets are created. Or you may want to safeguard how an asset can be used. This includes the use of watermarks and download permissions for controlled access. The final task involves tracking how an asset is used.

Quality Assurance for Created Assets

To ensure that only high-quality assets are created, virtual databases (VDBs) with upload approval can be created. In this case, the assets are created in the VDB only if the assets have run through an appropriate approval workflow and been approved.

For more information, see *Upload Approval* on the facing page

Safeguarding Who Can Use an Asset

You can flag assets as requiring approval to allow specific persons to access or use them or to prevent their access or use by specific persons, for example. Users must request permission to download or send assets that require approval from the owner. Once a user has received a download approval, the validity of the approval is unlimited and without restriction: The user can use the asset and all of its versions repeatedly.

For more information, see *Download Approval* on page 182.

Safeguarding How an Asset Can Be Used

You can regulate the use of assets using licenses. For example, you can define the usage or period of validity for the usage. Assets with a compulsory license can only be downloaded or sent after the license terms have been accepted. The license information is displayed in the detailed view of an asset.

For more information, see *Licenses* on page 185.

Tracking How an Asset Is Used

To control the use of assets outside of the *Media Pool*, you can set a watermark. The *Media Pool* can generate a visual and a digital watermark (metadata watermark). For more information, see *Watermarks* on page 187.

In your system, you can activate the function for tracking the online occurrence of pixel graphics that have been created as assets in the *Media Pool*. In this situation, an AI logic checks whether the image or parts of it are present on the internet. For more information, see *Finding Online Occurrences* on page 191.

8.1 Upload Approval

To ensure that only high-quality assets are created, virtual databases (VDBs) with upload approval can be created. In this case, the assets are created in the VDB only if the assets have run through an appropriate approval workflow and been approved.

You can call an overview of the upload approvals by navigating to > *Assets* > *Approvals*, see *Approvals on page 59*.

Associated Tasks

- *Requesting an Upload Approval* below

- *Viewing the Processing Status of an Upload Approval* on the next page

- *Processing Approval Requests* on the next page

Approval History

In the detailed view of an asset, information about the approval history of the last workflow is displayed in the *Approval history* field if this field has been created in the detailed view.

8.1.1 Requesting an Upload Approval

You automatically request upload approval for an asset if you assign the asset to a virtual database (VDB) that requires approval. You can do this in two situations:

- When you complete the asset attributes while creating an asset, see *Completing the Attributes of an Asset* on page 82.

- When editing the attributes of an asset that has already been created, see *Editing the Attributes of an Asset* on page 133.

In both cases, you must select a VDB that requires approval in the *Virtual DB* field when editing the attributes. If you have selected a VDB that requires approval, additional fields in which you can select one or more approvers are shown below the field.

Once you save the asset attributes, the approval workflow starts. The approver is informed accordingly. The asset has the status *Subject to approval*. An asset with this status cannot be edited and its detailed view cannot be opened. The status is displayed with a watermark in the preview image:

VDBs and workflows that require approval are configured by individual customers. If you have any questions, please contact your system administrator.

8.1.2 Viewing the Processing Status of an Upload Approval

Click > *Assets > Approvals > Upload Approvals > Still Pending*.

This opens a list of the assets that you have imported to a VDB that requires approval and that are still awaiting approval. The processing status is displayed next to the preview image.

8.1.3 Processing Approval Requests

1. Choose > *Assets > Approvals > Upload approvals > To Be Processed*.

    This opens an overview page displaying the upload approvals that you still have to process.

2. Click MENU... > *Set approval*

    This opens the detailed view of the asset in a pop-up window.

3. Choose *Approve* to approve the import to the VDB that requires approval. Choose *Reject* to reject the import to the VDB that requires approval.

    > 📄 Note
    >
    > You only ever process the workflow step for which you are responsible. If additional workflow steps are defined for the approval, then the asset is forwarded within the defined workflow. If you do not grant approval, the asset is deleted immediately.

1. If you do not grant approval, enter the reason in the field *Reason for rejection*.

2. If no step to reset the workflow to is specified in the workflow settings: Choose the step to which the approval workflow is set.

3. Choose *Finalize <Name of workflow>*.

The asset is now assigned to the VDB requiring approval and can be accessed by other users.

If the approval request is rejected, the user who made the request receives a system message. The request is listed under > *Assets > Approvals > Approvals > History > Received Rejections*. The asset cannot be accessed by other users.
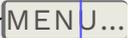
> **Note**
>
> If you want to grant multiple requests simultaneously, select the requests, click the lower MENU... button and then *Provide without visual watermark*.

8.2 Download Approval

You can flag assets as requiring approval to allow specific persons to access or use them or to prevent their access or use by specific persons, for example. Users must request permission to download or send assets that require approval from the owner. Once a user has received a download approval, the validity of the approval is unlimited and without restriction: The user can use the asset and all of its versions repeatedly.

You can call an overview of the download approvals by navigating to> *Assets > Approvals > Download Approvals*, see *Approvals* on page 59.

Associated Tasks

- *Flagging Assets as Requiring Approval* below

- *Requesting Download Approval* on the facing page

- *Processing a Request for Download Approval* on page 184

8.2.1 Flagging Assets as Requiring Approval

You can flag an asset as requiring approval in two situations:

- When you complete the asset attributes while creating an asset, see *Completing the Attributes of an Asset* on page 82.

- When editing the attributes of an asset that has already been created, see *Editing the Attributes of an Asset* on page 133.

In both cases, you must open the *Approval required* section by clicking the plus icon when editing the attributes. Activate the checkbox and enter approval information if necessary.

Once you save the asset attributes, the asset requires approval. This status will be indicated by a watermark on the preview image.
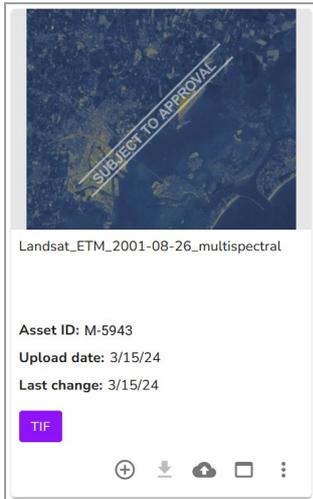
8.2.2 Requesting Download Approval

You request download approval when you want to save an asset that requires approval or send it by e-mail.

1. Search for the asset that requires approval.

2. Click > ⋮ > *Download/E-Mail > Save* or *Send as e-mail*.

   You will not be able to save or send the asset directly. Instead, you will need to request download approval.

3. Enter a reason for your request.

4. Click *Apply for approval*.

The owner is informed about your request and must process the approval request. You are automatically informed about the result by e-mail. If the download approval is granted, you can then save or send the asset.

If you save or send multiple assets that do not all require approval, you can save or send the assets that do not require approval immediately. For more information, see *Usage* on page 193.

8.2.3 Processing a Request for Download Approval

1. Click > *Assets* > *Approvals* > *Download approvals* > *To Be Processed*.

   This opens an overview page displaying the approvals that you still have to process.

2. Click the MENU… button below the request.

3. Choose *Grant* or *Reject*.
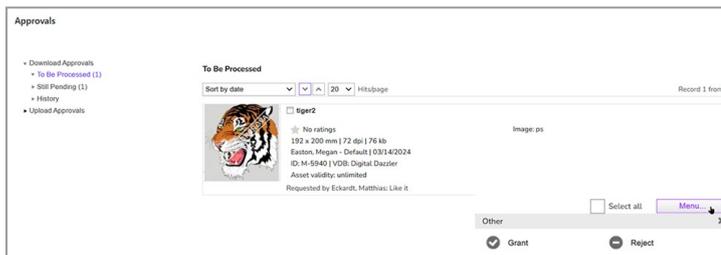
This grants the use of the asset or denies its use. The user who made the request is informed by system message. The asset is then sorted under *History > Granted Approvals* or *Rejected Approvals*.

> **Note**
>
> If you want to grant multiple requests simultaneously, select the requests, click the lower MENU… button and then *Provide without visual watermark*.

8.3 Licenses

You can regulate the use of assets using licenses. For example, you can define the usage or period of validity for the usage. Assets with a compulsory license can only be downloaded or sent after the license terms have been accepted. The license information is displayed in the detailed view of an asset.

Licenses are created on a customer-specific basis. If you have any questions, please contact your system administrator.

Associated Tasks

- *Assigning a License to an Asset* below

- *Accepting a License* on the next page: You accept a license when you want to save an asset that requires a license or send per the asset by e-mail. For more information, see Accepting a license.

- *Apply for License Extension* on the next page: If the license assigned to an asset is insufficient, you can request an extension of the license.

8.3.1 Assigning a License to an Asset

You can assign a license to an asset in two situations:

- When you complete the asset attributes while creating an asset, see *Completing the Attributes of an Asset* on page 82.

- When editing the attributes of an asset that has already been created, see *Editing the Attributes of an Asset* on page 133.

In both cases, you must open the *License required* section by clicking the plus icon when editing the attributes after clicking *Show excluded attributes*. Activate the checkbox at *License*, then choose a license type and then apply it in the *License type* field. The other fields show you the usage, validity period, regional and personal licenses, and a license image where applicable.

If you click *Apply*, a license is assigned to the asset. The asset can be downloaded only if the license terms have been accepted.

8.3.2   Accepting a License

You accept a license when you want to save an asset that requires a license or send per the asset by e-mail.

Accepting a License

1.   Search for the asset that requires a license.

2.   On the search result, click > ⋮ > *Save* or *Send as e-mail*

     You cannot then save or sent the asset directly; instead, you must first accept the license.

3.   Read the license terms.

4.   Confirm that you have read the license terms and will observe them: before*I have read the licensing terms …*, select the checkbox.

5.   Save the asset or send it as an e-mail. For more information, see *Save* on page 196 and *E-Mail Delivery* on page 198.

You have accepted the license.

8.3.3   Apply for License Extension

If the license assigned to an asset is insufficient, you can request an extension of the license.

Requesting a License Extension

1.   Search for the asset that requires a license.

2.   Click > ⋮ > *Download/E-Mail* > *Save or Send as e-mail* on the asset.

3.   Click *Apply for license extension*.

     The *License extension* dialog box opens.

4.   Enter the extensions that you require (for example, a different *Duration of use* or additional *Intended purpose*).

5.   Activate the checkbox *Copy to myself* if you want to receive the request yourself as an e-mail.

6.   Click *Send*.

You have requested the license extension.

8.4 Watermarks

In order to control the use and deployment of assets outside of the module *Media Pool*, your organization uses watermarks. The module *Media Pool* can generate a visual and a digital watermark (metadata watermark).

Visual Watermark

> **Note**
>
> Please note that you can only provide raster graphics and PDF files that are not password-protected with a visual watermark.

A visual watermark is rendered directly in the pixel image (e.g. JPG or GIF) or in the PDF file. When multi-page PDF files that are assigned to a suitably configured VDB are downloaded, a visual watermark is rendered on each individual page.

To prevent unwanted access to a PDF file, the PDF file can be protected with a password. A password-protected PDF file can *Media Pool* be imported into the module. However, to create a visual watermark, it must be possible to open the PDF file. Since this is not possible for password-protected PDF files, an info message is issued stating that a visual watermark cannot be created.

The info message is displayed if you:

- Attempt to import a password-protected PDF file to a VDB for which the option *Set visual watermark for downloaded asset* is activated (even using the REST API),

- Edit the attributes of a PDF file (individual and mass editing),

- Want to upload a password-protected PDF file as a new version of an asset,

- Want to edit attributes for an asset for which a password-protected PDF file has been created as a version.

Digital Watermark

In a digital watermark, various information is encoded and stored in the output format:

- Name of the user who downloaded the asset

- First and last name of the user (downloader)

- E-mail address of the user who either used the *Save* function to download the asset or used the *Send as e-mail* function to send it.

- Organizational unit of the user who either used the *Save* function to download the asset or used the *Send as e-mail* function to send it.

- Date of download

- Information about download quality

- For assets that require approval, additional information is stored:

- Name of the user who approved the download

- First and last name of the user who approved the download

- E-mail address of the user who approved the download

- Organizational unit of the user who approved the download

Associated Tasks

- *Linking an Asset to a Watermark* below

- *Checking Assets for a Digital Watermark* on the facing page

8.4.1   Linking an Asset to a Watermark

- You automatically link an asset to a watermark if you assign the asset to a virtual database (VDB) that is configured accordingly. You can do this in two situations:

- When you complete the asset attributes while creating an asset, see *Completing the Attributes of an Asset* on page 82.

- When editing the attributes of an asset that has already been created, see *Editing the Attributes of an Asset* on page 133.

In both cases, you must select a VDB for which the following options are activated in the *Virtual DB* field when editing the attributes:

- Set meta data Watermark for Downloaded Assets (digital watermark)

- Set Visual Watermark for Downloaded Assets

If you assign the asset to a corresponding VDB and save the attributes, users can now only save or send the asset with the watermark.

Note that the user who has uploaded a file or version always saves the asset without a visual watermark when downloading it or sending it by e-mail. This also applies when the asset has been transferred to a different owner.

VDBs are configured by individual customers. If you have any questions, please contact your system administrator.

8.4.2   Checking Assets for a Digital Watermark

You can check an asset for a digital watermark and read the information written to the file.

Prerequisites

- At the time of downloading, the saved asset was assigned to a virtual database for which the option *Set meta data Watermark for Downloaded Assets* is activated by an administrator.
- The digital watermark was written to the image file during the download from the Media Pool.

Checking Assets for a Digital Watermark

1. Choose > *Assets* > *Import*
2. Click the *Check digital watermark* button.

   The dialog *Check for Digital Watermark* opens.
3. Click *Browse* to select a locally stored asset for verification.
4. Click *Check selected file*.

The selected file is checked for a digital watermark. If a digital watermark is found, the information stored with encryption, such as the file name, download date or information about the download, is read out and displayed.

Check for Digital Watermark ✕

Digital Watermark Information

Information about the downloaded file ⌄

Information about the downloader ⌃

Username:	bella.bauer@
Name:	Bella Bauer
E-mail:	.com
Division:	MI6 > The IT Crowd

Information about the approver ▬

CLOSE

8.5 Finding Online Occurrences

In your system, you can activate the function for tracking the online occurrence of pixel graphics that have been created as assets in *Media Pool* module. In this situation, an AI logic checks whether the image or parts of it are also available on the Internet.

> **Note**
>
> If you would like to activate this function, please contact your contact partner at Uptempo GmbH.

1. Open the detailed view of the asset.

2. Choose > ⋮ > *Find online occurrence*s.

The result is displayed in a list of up to 100 hits with URLs, sorted by relevance in descending order.

Find online occurrences of asset: "Sleak_passport_photo_man_50s"   ✕

Found 6 occurrences

1. https://www.seaart.ai/explore/detail/cl48a1p4msb61ntmu62g
2. https://www.seaart.ai/explore/detail/cmnjn2de878c73ctc2og
3. https://www.seaart.ai/explore/detail/cj00fg94msbf8uov6j1g
4. https://www.seaart.ai/zhCN/explore/detail/ckm0mt94msba8dsse55g
5. https://www.seaart.ai/ar/explore/detail/ckm0mt94msba8dsse55g
6. https://www.seaart.ai/ru/explore/detail/ckm0mt94msba8dsse55g

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Usage

9

As the person responsible for the DAM, Ron has various uses for assets. These include:

- downloading approved product images for use in campaigns and on the company's product website
- the provision of videos for sales for integration into product presentations

Whenever you use an asset, you normally use it outside of the *Media Pool* module. In the simplest case, you would download an asset and save it locally. *Media Pool* provides a number of different options for using assets:

Saving

When you save an asset, you download it from the Media Pool and save it locally on your computer. When saving the assets, you can change them using rendering schemes. For more information, see *Save* on page 196.

E-Mailing

When you send an asset by e-mail, you make it accessible to other persons. They may be other users or persons with no access to the Media Pool. You can send the asset as an attachment or link. When sending assets by e-mail, you can change them using rendering schemes. For more information, see *E-Mail Delivery* on page 198.

Publication

If an asset is provided for publication on a channel, it is monitored by the system. In certain events defined for the channel in the module administration, the third-party system is informed. The third-party system processes the asset based on its programming and, for example, posts the asset to a social media platform. Rendering schemes are used for publication through a channel. For more information, see *Publication Channels* on page 214.

In Other Modules

The assets from the Media Pool can be used in other modules (for example, you can use them as items in the Marketing Shop or templates in Brand Template Builder). For further information, see *In Other Modules* on page 218.

Rendering Schemes

When saving or sending assets by e-mail, you can change them using rendering schemes. Rendering schemes group together output formats for specific purposes, such as for downloading assets in various formats as PDFs or for using graphics with a low resolution in web applications. The output formats correspond to the technical possibilities for converting and outputting the assets.

For more information, see *Rendering Schemes* on page 201.

Note

Note the special issues for sending InDesign files with linked images. For further information, see *Using InDesign Files* on page 213.

9.1 Save

When you save an asset, you download it from the module *Media Pool* and save it locally on your computer. When saving the assets, you can change them using rendering schemes.

Functions

You can access the following functions from the gear wheel icon for each asset

- Remove: This deletes the asset from your download.

- Open: This opens the detailed view of the asset.

Saving an Asset

1. Select one or more assets.

2. On a single asset search result or in the detail view click ⋮ > *Download/E-Mail* > *Save*. To download several selected assets at the same time, first click the MENU… button above the search result and then in the menu select *Download/E-Mail* > *Save*.

   The *Asset download* dialog box opens. The asset or all selected assets are automatically added to your download. The preview images of the assets contained are displayed in the *Assets requested for download* area.

3. Select an appropriate rendering scheme.
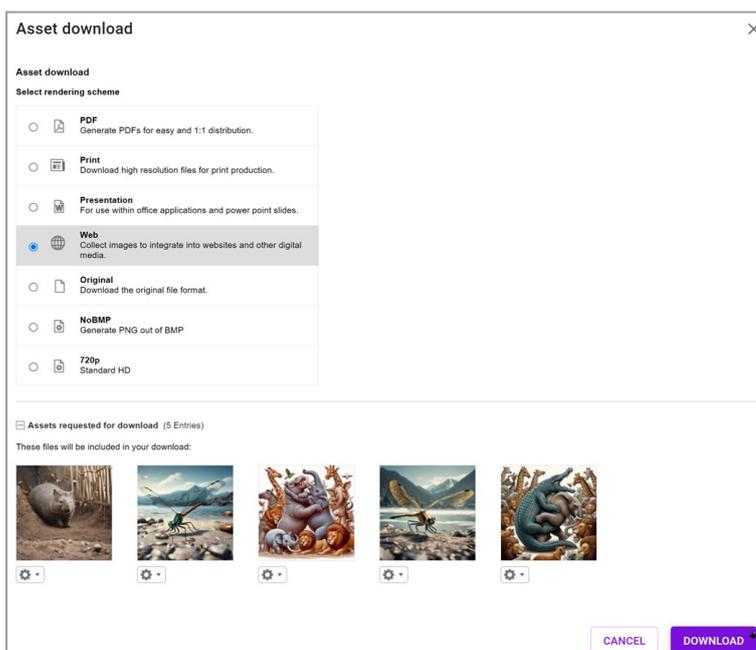
4. If you want to edit images, open the image editing functions. For more information, see *Image Editor* on page 201.

5. If you want to save assets that require approval, request approval for these assets. For more information, see *Requesting Download Approval* on page 183.

6. If you want to save assets that are subject to licenses, confirm the license conditions. For more information, see *Accepting a License* on page 186.

7. If you require a license extension, request the extension. For more information, see *Apply for License Extension* on page 186.

8. Click *Download*.

You save the selected assets. A ZIP file is created automatically when you download several assets.

Note

Note the special issues for sending InDesign files with linked images. For more information, see *Using InDesign Files* on page 213.

9.2 E-Mail Delivery

When you send an asset by e-mail, you make it accessible to other persons. They may be other users or persons with no access to the *Media Pool* module. You can send the asset as an attachment or link. When sending assets by e-mail, you can change them using rendering schemes.

Sending an Asset as a Link or Attachment

When sending an asset by e-mail, you choose whether to add the asset to the e-mail as a link or an attachment.

- *As link*: Activate the checkbox to create and send a link for each asset. One asset can be downloaded via the link. The options specified in the rendering scheme determine the output format. Note that the link may have a validity period. If you have any questions, please contact your system administrator.

- *As attachment*: Activate the checkbox to send the asset or the created output format via e-mail as an attachment. Multiple assets are automatically packed into a ZIP file.

Versions When Sending an Asset as a Link

If assets are sent as a link, you can choose which version is linked to.

- *Link to the selected version of the asset*: The link always refers to the version that is active at the time that the link is created. If an additional version is uploaded at a later stage, the link references the older version.

- *Link to the active version of the asset*: The link always refers to the version that is active at the time that the asset is downloaded via the link. If an additional version is uploaded at a later stage, the link references the newer version that is now active.

- *Link to the official version of the asset*: The link refers to the version that is marked as official at the time that the asset is downloaded via the link. If an additional version is marked as official at a later stage, the link references the version that is now official.

Functions

- *Remove*: This deletes the asset from your download.

- *Open*: This opens the detailed view of the asset.

- *Subject*: Change the automatic subject text if required.

- *Recipient*: Write the e-mail address of the recipient in the input field.

- *Copy to*: Enter an e-mail address to which you want to send a copy of the message.

- *Copy to myself*: Activate this checkbox to send a copy of the message to the e-mail address that is defined for you in the system.

- *Message*: Enter the text of your e-mail in the input field. You can use the *Recently added* drop-down box to select from the most recently used cover letters.

Sending an Asset as E-Mail

1. Select one or more assets.

2. Click ⦂ >*Download/E-Mail*> *Send as e-mail* on a single search result or in the asset's detailed view. To download several selected assets at the same time, first click the MENU button above the search result and then *Download/E-Mail*> *Send as e-mail*.

   The dialog *Send as e-mail* opens. Any assets that you have selected are added to your download automatically. The preview images of the selected assets are displayed in the *Assets requested for e-mail dispatch* section.

3. Select an appropriate rendering scheme.

4. If required, add a playlist. For more information, see .

5. If you want to edit images, open the image editing functions. For more information, see *Image Editor* on page 201.

6. If you want to send assets that require approval, request approval for these assets. For more information, see *Requesting Download Approval* on page 183.

7. If you want to save assets that are subject to licenses, confirm the license conditions. For more information, see *Accepting a License* on page 186.

8. If you require a license extension, request the extension. For more information, see *Apply for License Extension* on page 186.

9. Enter the information necessary to send the e-mail. Mandatory fields are marked with *.

10. If you are sending the assets as a link, define the options for the download links.

11. Click *Send as e-mail*.

You have sent the assets by e-mail.

Note

Note the special issues for sending InDesign files with linked images. For more information, see *Using InDesign Files* on page 213.

9.3 Rendering Schemes

When saving assets and sending them by e-mail, you can change them using rendering schemes. Rendering schemes group together output formats for specific purposes, such as for downloading assets in various formats as PDFs or for obtaining graphics in a low resolution for a web application. The output formats correspond to the technical possibilities for converting and outputting the assets.

> **Note**
>
> For the video asset to be saved in a different video format, the file must be transcoded. If the video file has not been transcoded, the transcoding must be requested or triggered. Click the gear icon in the download dialog and *Add to video transcoding*. The video asset is queued for video processing. Once the transcoding is finished successfully, you are notified by e-mail. The message contains a link that you can use to access or save the file directly.

For more information, see the following sections:

- *Default Rendering Schemes* on page 241
- *Output Formats* on page 248
- *Image Editor* below: In a rendering scheme, you can specify whether an image can be edited before downloading or sending. Editing of an image is activated by default for the *Presentation*, *Web*, and *Print* rendering schemes.

Rendering schemes are defined on a per-customer basis. If you have any questions, please contact your system administrator.

9.3.1 Image Editor

In a rendering scheme, you can specify whether an image can be edited before downloading or sending. Editing of an image is activated by default for the *Presentation*, *Web*, and *Print* rendering schemes.

Opening the Image Editor

You can open the Image Editor when you save or email one or more assets. You can open the Editor in the *Asset download* or *Send as e-mail* dialog invoke the *Edit* function in the gear menu below the asset, if the selected rendering scheme allows the asset format to be edited.

Note that the editing assets is covered by the instructions for ︓ *>Download/E-Mail> Save* (see *Save on page 196*) or *Send as e-mail* (see *E-Mail Delivery* on page 198).

Editing Functions
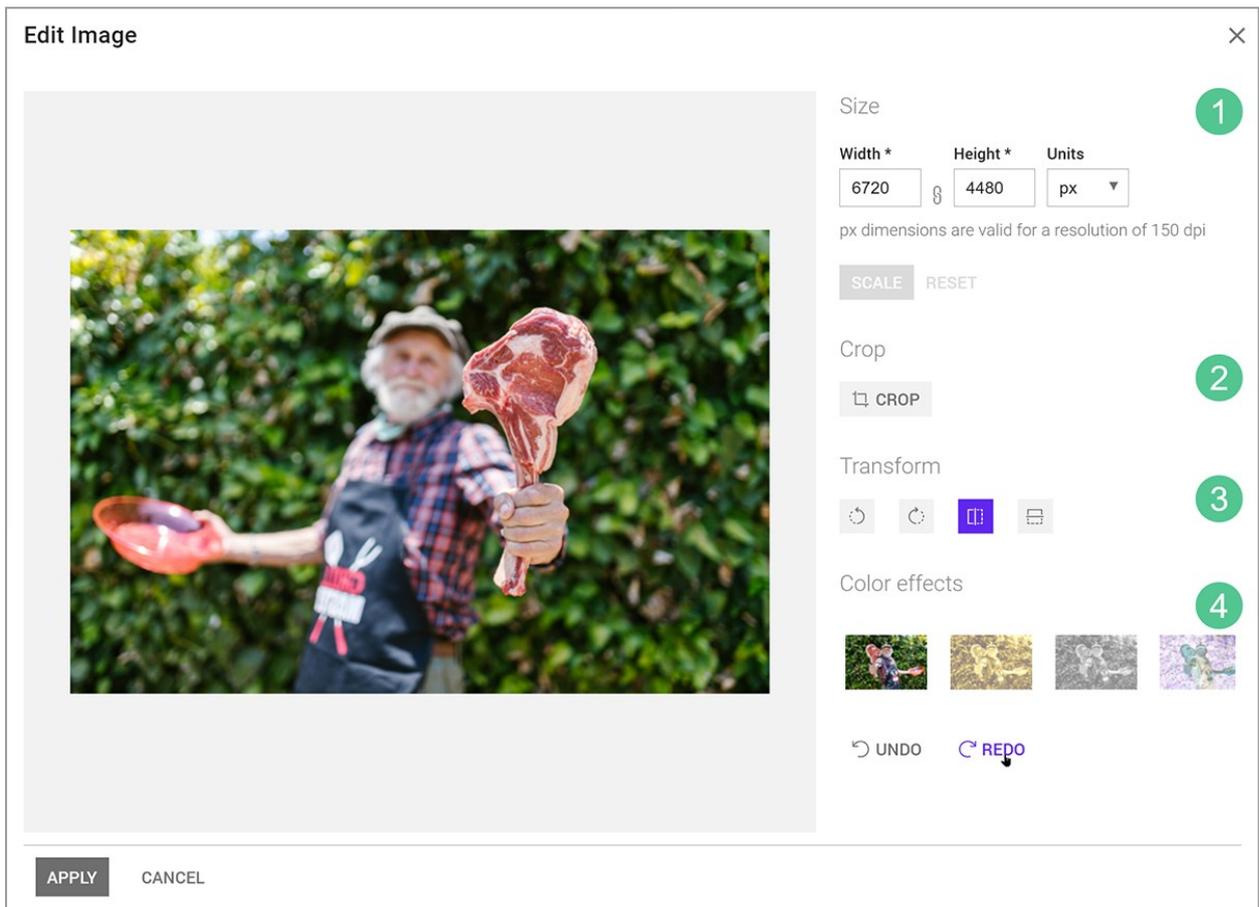
You can access the following functions to edit an image:

Size

This function defines the size ① of the image. The dimensions relate to the resolution specified in the rendering scheme for the file format. You can enter the new height or the new width. The other value will be calculated automatically to maintain aspect ratio. The image cannot be stretched. If you increase the dimensions, the resolution will be reduced. A warning will be displayed in such cases. Click *Scale* to make the change.

EXAMPLE 1

You want to download a JPG file. It will have a resolution of 300 DPI if you download it with the standard rendering scheme *Print*. The following will be displayed when using the image editing function *Size*:

Size

Width *   **Height ***   **Units**

42   §   28   cm ▼

cm dimensions are valid for a resolution of 150 dpi

SCALE   RESET

This means that the image will have a size of 42 × 28 cm at a resolution of 300 DPI if you download it without editing.

You need the image for an A4 brochure, and the image should be only 16 cm wide. If you download the image without editing, you would have to resize it manually. The file size will also be unnecessarily large.

To avoid this, enter the value 16 (cm) into the *Width* field in the *Size* section. The height will be calculated automatically. Then click *Scale*. If you close the Image Editor dialog with *Confirm* and download the image, it will be displayed with a width of 16 cm and a resolution of 300 DPI.

EXAMPLE 2

You want to use the image from example 1 in a HTML advertising banner. You therefore select the standard rendering scheme *Web* which outputs JPG files with a resolution of 72 dpi. The following will be displayed when using the image editing function *Size*:

This means that the image will be displayed with dimensions of 6720 × 4480 pixels at a resolution of 72 dpi.

You need the image to be 1000 pixels wide in your banner. If you download the image without editing, you would have to resize it manually. The file size would also be unnecessarily large.

To avoid this, enter the value 1000 (pixels) into the *Width* field in the *Size* section. The height will be calculated automatically. Then click *Scale*. If you close the Image Editor dialog with *Apply* and download the image, it will be displayed with a width of 1000 pixels at a resolution of 72 DPI.

> **Note**
>
> If you want to scale the image and select a specific section, you can jump directly to the *Crop* function using the option *Select size of the image to be cropped*. See the following section for more information.

Crop

You can use the *Crop* **2** functions to crop the image to a specific section (minimum size 50 × 50 pixels). Click *Crop* to open the following dialog:
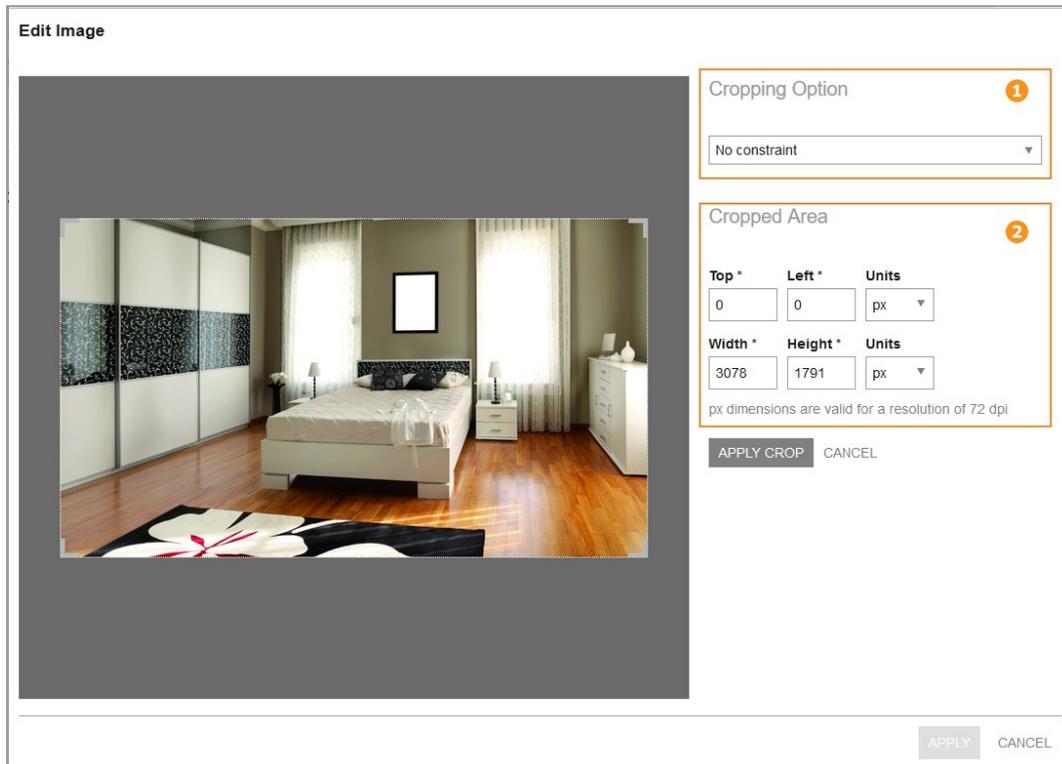
A preview of the image is shown on the left along with a crop rectangle. You can click the corners of the rectangle and drag them to the desired size. If you click within the rectangle and hold the mouse button down, you can position the rectangle on the image to specify the section which you want to keep.

The size and position of the rectangle is also displayed on the right beneath ❷ *Cropped Area*. The rectangle can also be edited in these fields:

- *Position*: The *Top* and *Left* fields correspond to the distance between the top left corner of the rectangle and the original top left corner of the image.

- *Size*: The *Width* and *Height* fields correspond to the size of the rectangle. The values relate to the dimensions of the original image section in the resolution specified by the rendering scheme.

You can use the cropping options to the top right ❶ to control the crop rectangle regardless of whether you change the rectangle with the mouse or using the fields under *Cropped Area*. The following cropping options are available:

- *No constraint*: There are no restrictions on how you can change the crop rectangle within the image. The final size of the image will be the same as the size of the cut-out section in the original image.

- *Original aspect ratio*: The rectangle will have the same aspect ratio as the original image. The aspect ratio will not be changed if you change the size of the rectangle. The final size of the cut-out section will be the same as the size of the section in the original image.

- *Custom aspect ratio*: If you select this option, two fields will be displayed in the **1** section, in which you can enter a horizontal to vertical aspect ratio. The crop rectangle will automatically be set to its maximum size with this aspect ratio. The aspect ratio will not be changed if you change the size of the rectangle. The final size of the cut-out section will be the same as the size of the section in the original image.

- *Define dimensions of cropped image*: If you select this option, two fields will be displayed in the section **1** in which you can enter the desired size of the cut-out section. The crop rectangle will automatically be set to its maximum size with the aspect ratio derived from the width and height which you have entered. You can then change the position and size of the rectangle to select the section which you want to cut out. Click Crop to display the selected section. Once the image has been downloaded, it will have the specified size at the resolution of the rendering scheme.

EXAMPLE 3

You want to use the following asset but only need a section with a table and chair.

In this example, you determine the size of the section to be cropped under *Cropping Option > Define dimensions of cropped image*.

You need the image for a printed product, i.e. at a resolution of 300 DPI with a width of 16 cm and a height of 8 cm.

Select ⋮ > *Download/E-Mail* > *Save* at the search result. Select a rendering scheme which outputs the file format at a resolution of 300 dpi, e.g. the standard rendering scheme *Print*. Then click the gear menu on the preview image and select *Edit*. This will open the *Edit Image* page. Click on *Crop*.

In the next dialog box, select *Define dimensions of cropped image* in the *Cropping Option* drop-down list. The *Width*, *Height* and *Units* fields will be displayed. Select the unit *cm* and enter *16* (cm) for the width and *8* (cm) for the height. The crop rectangle will automatically be set to its maximum size with an aspect ratio of 16:8 = 2:1.

Select the desired section, e.g.:

The position of the rectangle (*Top* and *Left*) and the original size of the selected area at the resolution of the rendering scheme (*Width* and *Height*) will be displayed under *Cropped Area*. Click *Crop* to crop the selected area and display it with a size of 16 × 8 cm at a resolution of 300 dpi:
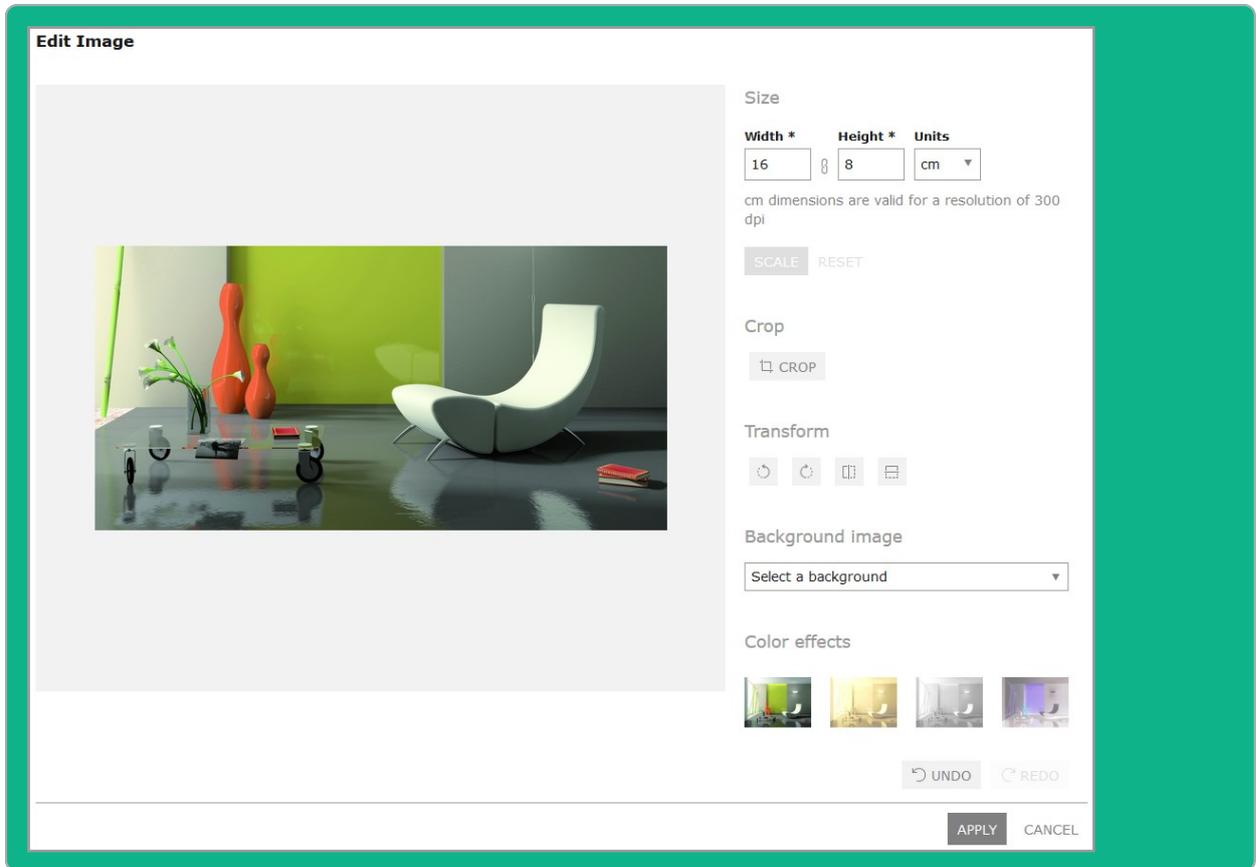
Transform

The following transformations 3 are available:

Function	Description
↺	Rotate 90° counter-clockwise
↻	Rotate 90° clockwise
▯	Flip horizontally
▭	Flip vertically

Background Image

If configured, you can select a background image 4 for transparent images. This can be useful if you want to render an image with a logo in the background.

Select an image from the drop-down list. The images are managed in the Administration. If you have any questions, please contact your system administrator.

Color Effects

You can apply a color effect 4 to the image in the final section. Select whether to display the image in a sepia hue or grayscale, or create a negative.

Associated Tasks

Please refer to *Editing an Image* below for information about how to access image editing functions. Note that the following instructions are part of the instructions for： *>Download/E-Mail> Save*(see *Save* on page 196) or *Send as e-mail* (see *E-Mail Delivery* on page 198.

9.3.2 Editing an Image

Note that the following instructions are part of the instructions for *saving an asset* (see *Save* on page 196) and/or *sending it by e-mail* (see *E-Mail Delivery* on page 198.

1. Select a rendering scheme that allows you to edit the image. Editing of an image is activated by default for the *Presentation*, *Web*, and *Print* rendering schemes.

2. Call the *Edit* function via the cog wheel icon.

   This opens an editor that provides the editing functions.

3. Edit the image.
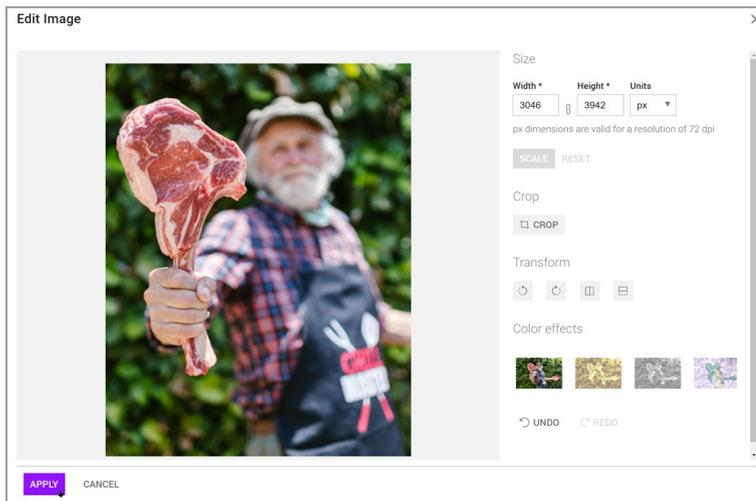
4.

Click *Apply* to save the image processing made before.

This closes the editor.

5. Continue saving or sending the asset by e-mail.

You have edited the image before saving it or sending it by e-mail.

9.4   Using InDesign Files

If you use the InDesign asset, you can decide whether the document is used with or without the linked images:

- On an individual asset in the search result or in the asset's detailed view click ： > *Download/E-Mail > Save or Save with linked images*

- On an individual asset in the search result or in the asset's detailed view click ： > *Download/E-Mail* > Send as e-mail or *Send as e-mail with linked images*

If versions of the images exist, you can choose between the versions.

Special Issues

If you choose to save or send the asset with linked images, note the following special issues:

- The asset is always used as an original. Therefore a rendering scheme cannot be selected.

- The asset can be sent only as a link. The recipient can download the InDesign file with the linked images as a ZIP file via the link.

- All links go to the version that is current at the time of the download. This corresponds to the *Link to the active version of the asset* selection.

9.5 Publication Channels

If an asset is provided for publication on a channel, it is monitored by the system. In certain events defined for the channel in the module administration, the third-party system is informed. The third-party system processes the asset based on its programming and, for example, posts the asset to a social media platform. Rendering schemes are used for publication through a channel.

Events in which the third-party system is informed may be, for instance, a new version of the asset, the publication itself, or a change to asset attributes.

Prerequisites

To publish an asset through a channel, the asset must be valid.

Managing Publication on Channels

You manage publication on channels in the *Publishing channels for...* dialog box. The dialog box opens when you click the ⬆ button in a search result for the asset or in the detailed view of the asset.

Default Channels

The module *Media Pool* has the following default channels:

- Create publicly available links: This creates a public link on the web cache.

- Share asset via SEW, MPM or CEA: If the SEW, MPM, or CEA modules are activated in your system, you can release assets via this channel for these modules.

Publishing to Multiple Channels

An asset can be published on multiple channels at the same time or at different times. There is no restriction with regard to the maximum number of simultaneous publications of an asset.

When the *Publish* button is grayed out and inactive, a tooltip will provide you with a brief explanation of the cause and a possible fix when you hover over it. For example, 'The selected rendering scheme is not valid.'

Timelines and Status

You can publish an asset immediately; in this case, it is included for the channel immediately. You can also schedule the publication separately for each channel starting from a specific time or for a specific time period. You can also finish a publication.

You can view the status of the publication of an asset for various channels when you open the *Publishing channels for...* dialog box. The left-hand column in the table displays the status:

Status	Description
Green	The asset is currently published on this channel.
Yellow	The asset is scheduled to be published on this channel. A corresponding start date has been set.
Gray	The asset is not published on this channel and no publication is scheduled.
Red	The publication period for the asset has expired.

Delete Published Assets

When a published asset is moved to the recycle bin by deletion, the asset is automatically unpublished.

> **Note**
>
> It is not possible to publish assets that are in the recycle bin. The *Publish* button therefore appears grayed out for such assets. At the top of the channel publishing dialog box, a corresponding note is displayed with an appropriate reason.

Associated Tasks

- *Publishing an Asset Immediately* on the next page
- *Scheduling the Publication of an Asset* on the next page

- *Editing the Publication of an Asset* on the facing page
- *Finishing the Publication on a Channel* on the facing page

9.5.1 Publishing an Asset Immediately

1. Search for the asset that you want to publish immediately.
2. In the search result, click the ☁ button next to the asset.

    The dialog box *Publishing channels for…* opens.
3. If a rendering scheme is not defined yet for the channel on which you want to publish the asset:
    a. Click *Edit*. The editing dialog box opens.
    b. Select an appropriate rendering scheme.
4. Click *Publish*.

The asset is published on this channel.

9.5.2 Scheduling the Publication of an Asset

1. Search for the asset whose publication you want to schedule.
2. In the search result, click the ☁ button next to the asset.

    The dialog box *Publishing channels for…* opens.
3. Click *Edit*.

    The *Edit* dialog box opens.
4. In the *From* field, select a start date for the publication.
5. If you want to limit the publication time period, select an end date in the *To* field.
6. Ensure that a suitable rendering scheme is selected.
7. Choose *Schedule*.

You have scheduled the publication of the asset.

9.5.3 Editing the Publication of an Asset

You may have to edit the ongoing or scheduled publication of an asset if you select a different rendering scheme or want to change publication data.

1. Search for the asset whose publication you want to edit.

2. In the search result, click the ☁ button next to the asset.

   The dialog box *Publishing channels for...* opens.

3. Click *Edit*.

   The *Edit* dialog box opens.

4. Edit the publication data or rendering scheme.

5. Choose *Publish* or *Schedule*.

You have edited the publication of the asset.

9.5.4 Finishing the Publication on a Channel

1. Search for the asset whose publication you want to finish.

2. In the search result, click the ☁ button next to the asset.

   The dialog box *Publishing channels for...* opens.

3. Click the *Unpublish* button next to the channel on which you want to stop the publication.

You have finished the publication of the asset on the channel.

9.6 In Other Modules

> **Note**
>
> Note that not all of the modules may be available in your system and that you may not have access to each of the specified modules.

Assets from the module *Media Pool* can be used in the following modules of Uptempo Work Management:

Brand Template Builder

The following graphic explains how assets from the module *Media Pool* are used in Brand Template Builder:
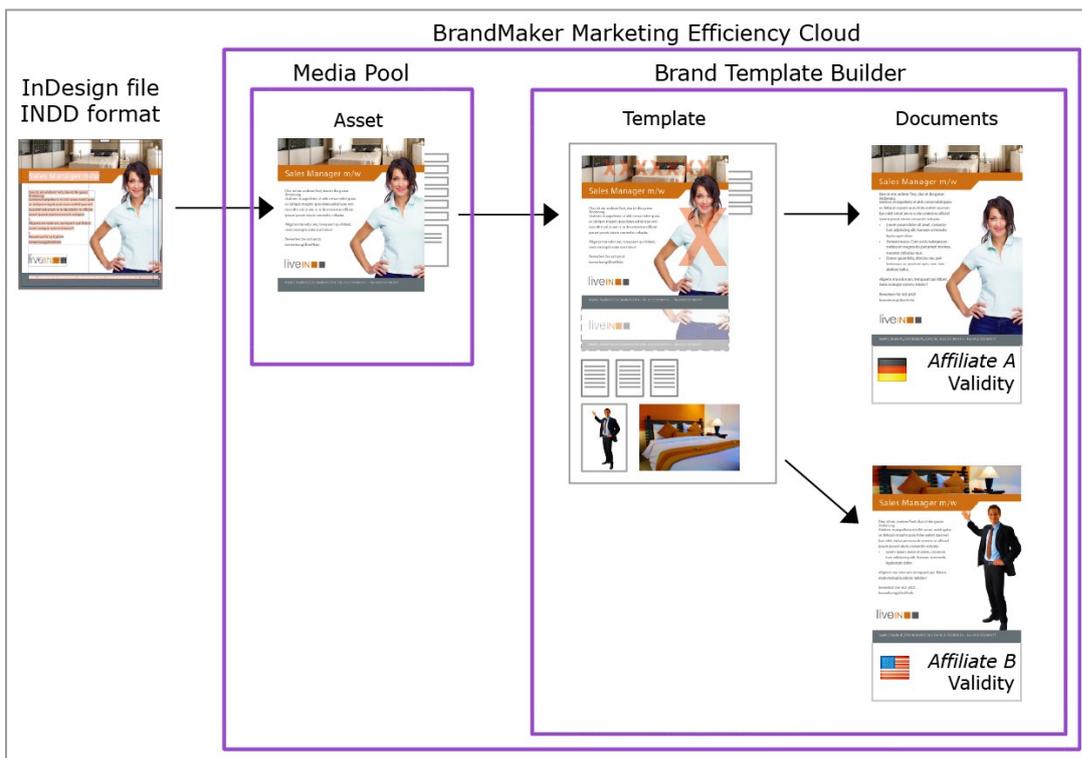
In the first step, you create the InDesign file in INDD format. Subsequently, the InDesign file is created as an asset in the *Media Pool* module. You create the asset as the basis for creating the template in template design in the *Brand Template Builder* module. When doing so, you define the following issues:

- Which features and elements of the INDD file can be changed?

- How can the user change the features and elements?

If a user creates a document, the user edits the features and elements that can be changed. In this case, each document receives the following properties:

- Locale assignment

- Validity within a specific time period

- The assignment to an affiliate

InDesign does not need to be installed locally to customize the file. Users edit the created documents in the Brand Template Builder customizing wizard.

In addition, you can use image assets in templates and documents.

For more information on the documentation of the Brand Template Builder module, see *Additional Documentation* on page 18.

Marketing Shop

Assets can be created as items in the Marketing Shop, either as free download items or download items that are subject to costs. For more information, see *Creating an Item* on page 221.

If you have the corresponding authorization, you can order or download a download item. Prerequisites for this are:

- The asset has been created as a shop item of the *Download item with costs* type.

- The asset is assigned to a VDB for which the *Order via Shop required* checkbox is activated.

- The shop item is assigned to a rendering scheme and the possible output formats are linked to a price.

For more information, see *Ordering or Downloading a Download Item* on page 222.

Job Manager

If configured accordingly, you can start the revision of an asset in the Job Manager. For more information, see *Revisions* on page 149. In addition, you can also add an asset to a job, for example, as a visual representation. For more information on the Job Manager documentation, see *Additional Documentation* on page 18.

Marketing Data Hub

With the appropriate configuration, you can add assets from the module to a data object, *Media Pool* e.g. as product images. For more information on the Marketing Data Hub documentation, see *Additional Documentation* on page 18.

Marketing Planner

To add information to your marketing plan, you can add download links to assets in the module *Media Pool* to the planning elements . For more information on the Marketing Planners documentation, see *Additional Documentation* on page 18.

Review Manager

The Review Manager lets you discuss assets with your colleagues. The media objects may be images, documents, videos, or web pages. The Review Manager allows for both direct discussion within the review and optionally for the participants to grant approval for it.

A review is started on the asset placed in the data sheet in the Job Manager. For more information on the Review Manager documentation, see *Additional Documentation* on page 18.

9.6.1   Creating a Job

Prerequisites

You have the appropriate authorizations for the Job Manager module.

Creating a Job

1. Search the asset for which you want to create the job.

2. Click > ⋮ > *Create Job* on the asset in the search result.

   This opens the *Create Job* dialog window.

3. Enter the name of the new job in the input field, select a suitable job type and confirm with *Add*.

   This opens a new dialog box.

4. Enter the name of the job in the input field and confirm by choosing *Save*.

   The job data sheet is created and opened.

5. Enter all mandatory information on the data sheet.

6. Click *Save* after you have entered all the required information about your job.

7. Click the ✕ close button to return to the asset search.

The job is now listed in the job overview in the Job Manager module and can be edited from there. You can call the job from the Job Manager module.

9.6.2   Creating an Item

Prerequisites

- You can create a shop item only from valid assets.

- You require the corresponding permissions in the Marketing Shop module. If you have any questions, please contact your system administrator.

Creating an Item

1. Search for the assets that you want to create as items.

2. Click ⋮ > *Create shop item*. To create multiple assets as items, check the boxes for the relevant assets and select the function from the menu button for bulk actions above the search result.

   You switch to the *Edit item* page in the Marketing Shop module.

3. Select the *Download item* item type.

4. Click *Generate item number*s.

   This creates an item number for all the selected assets.

5. Click *Next*.

   You then switch to the *Basic Data* tab.

6. Specify the assigned catalogs by activating one or more checkboxes.

7. Activate the *Approved* checkbox.

8. Define the additional optional information.

9. Click *Next*.

   You switch to the *Supplier* tab.

10. From the *Price per download quality* drop-down list, select a rendering scheme that you want to link to the price.

11. Enter the desired price in the input field.

12. Click *Add quality and price*.

13. Define a price for additional rendering schemes by repeating steps 10 to 12.

14. Select a Supplier from the drop-down lists and set the Status of the item.

15. Click *Next*.

    You then switch to the *Custom Fields* tab.

16. Enter all the information that is necessary to create the item. Define the custom fields for the article or articles.

17. Click *Start creation*.

The item is created.

9.6.3   Ordering or Downloading a Download Item

Prerequisites

- The asset has been created as a shop item of the type *Download item*with cost.

- The asset is assigned to a VDB for which the *Order via Shop required* checkbox is activated.

- The shop item is assigned to a rendering scheme and the possible output formats are linked to a price.

Ordering or Downloading a Download Item

1. Select one or more assets that are created as download items.

2. At the search result click > ⋮ Download/E-Mail > *Save*. Use the `MENU...` button above the search results to carry out mass actions for several selected assets.

   This opens the *Order asset* dialog box.

3. Select an appropriate rendering scheme. The prices stored for the item are displayed.

4. Click *Add to shopping cart* to order the download items with costs. You can download items that are free of charge directly.

5. Go to the shopping cart in the Marketing Shop and complete the order process.

You have ordered or downloaded the download item.

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Analyze 10

If you click > *Assets* > *Reports*, you can access the standard dashboard in the *Reporting Center* module. Note that you must have a role with the appropriate permissions in the *Reporting Center* module to access the standard dashboard.

For more information about the default dashboard, see the appropriate documentation.

11

Appendix

11.1 Asset Attributes

This section describes the asset attributes available in the *Media Pool* module.

> **Note**
>
> Note that in some circumstances, not all of the attributes are used in your system. In addition, the display of the attributes depends on the selected asset type. Which asset types exist in your system and which attributes are assigned to the types depends on the configuration of the system. If you have any questions, please contact your system administrator.

The asset attributes are divided into the following groups:

Basic Attributes

The basic attributes include mandatory attributes that must be edited for each asset before the asset is *Media Pool* available in the module. In addition, this group includes attributes that each asset receives automatically, such as a unique asset ID. For more information, see *Basic Attributes* on the facing page.

File Attributes

The file attributes are read from the file during upload and displayed in the module *Media Pool* module as information for the user. Note that some attributes depend on the file type such as document, pixel graphic or video. For more information, see *File Attributes* on page 230.

Descriptive Attributes

This group includes attributes that describe the asset and/or its content but that do not have a functional effect in the *Media Pool* module. It includes, for example, the assignment to countries or a language and a list of persons shown. For more information, see *Descriptive Attributes* on page 232.

Functional Attributes

Functional attributes are directly linked to the functions of the *Media Pool* module. The functions include, for example, asset versioning, publishing, and backups. The functional attributes describe the conditions in the relevant functions, for example, which version an asset has and whether it is published. For more information, see *Functional Attributes* on page 232.

Standardized Attributes

This group includes data that is standardized by organizations and maintained in the metadata of the file, such as camera data or IPTC Photo data. The standardized attributes are read out of the file during upload and displayed in the *Media Pool* module as information for the user about the asset. The user cannot edit these attributes. For more information, see *Standardized Attributes* on page 237.

11.1.1 Basic Attributes

The basic attributes include mandatory attributes that must be edited for each asset before the asset is available in *Media Pool*. In addition, this group includes attributes that each asset receives automatically, such as a unique asset ID.

- ▼: The attribute is generated automatically or extracted from file properties.

- ◢: The attribute can be edited.

- ✳: Mandatory attribute. The attribute must be edited so that the asset is accessible in the module *Media Pool*.

Name	Description	▼	◢	✳
Asset name	The plain text name of the asset. This input field is automatically prefilled with the file name and/or the name of the imported file when the asset is created.	✓	✓	✓
File name	Uploaded file name (without file extension). Enter a maximum of 255 characters and do not use the following characters: : / \ ™ $ ® , ! ; " * ? < > | File names must not begin with '.' or '-'. Furthermore, file names must not end with '.'. If you download the asset, the file is saved under the changed name. Note that the file name cannot be changed during mass editing. Note: File naming conventions may differ from your local operating system, so you are advised to correct file names before uploading.	✓	✓	

Name	Description	▼	◩	✳
Asset ID	Unique ID of the asset in the module *Media Pool*. The ID is assigned automatically when the asset is created.	✓		
File type/ex-tension	Image, document, video or audio.	✓		
Categories	The categories assigned to the asset when it was created.		✓	✓
Virtual DB	VDB to which the asset is assigned.		✓	✓
Owner	User, who is the *Owner* on page 27 of the asset. The owner is initially the user who created the asset. The owner can be changed by handing over the asset to a different user, see *Change Asset's Ownership* on page 137.	✓	✓	
Created by	User who has created the asset.	✓		
Upload date	Date on which the file was created as an asset.	✓		
Last change	Date on which the asset attributes were last changed or a version was created.	✓		

11.1.2 File Attributes

The file attributes are read from the file during upload and displayed in the module *Media Pool* as information for the user. Note that some attributes depend on the asset type such as document, pixel graphic or video.

Name	Description
Generated file name	For the internal editing of the asset: The automatic file name (including the file extension) generated from the file name
File format	Format of the uploaded file
File size	Size of the uploaded file
Vector Graphics	

Name	Description
Size (W × H)	Size
Page count	Number of pages
Color mode, Color depth	Color mode (for example, CMYK) and color depth (for example, 24 bit)
Pixel Images	
Pixel size	Width × height in pixel
Document size	Dimensions for a specific resolution (150 or 300 dpi, for example)
Color mode, Color depth	Color mode (for example, CMYK) and color depth (for example, 24 bit)
Documents	
Size (W × H)	Size of first page
Page count	Number of pages
Video	
Width/Height	Width and height in pixel
Length	Duration
Audio	
Year	Year of publication
Bit rate	Data transfer rate
Audio sample size	Sample rate of an audio signal. The default value is usually 44100 Hz.
Length	Duration
Channels	Number of channels, for example, one channel for Mono or two channels for Stereo.
Format	File format for the audio track

11.1.3 Descriptive Attributes

This group includes attributes that describe the asset and/or its content but that do not have a functional effect in the *Media Pool* module. It includes, for example, the assignment to countries or a language and a list of persons shown.

Name	Description
Tags	The tags assigned to the asset when it was created.
Keywords	The keywords assigned to the asset when it was created.
Language	Language assignment
Relevant countries	Assignment of countries for which the asset is relevant. The relevant countries can be used as search criteria by using the *Country* field.
Person(s) shown	List of the persons shown in the asset.
Remarks	Information stored as remarks in text form.
Item description	Description of the asset as an item in text form.
Platform	Assignment of a platform: *PC*, *Mac* or *Others*
Program version	Program version assignment. If a PDF is uploaded, the PDF version is entered.
ISIN	ISIN number. An ISIN(International Securities Identification Number) can be used to identify securities traded on the stock market. If a list of permitted ISIN numbers is maintained for publishing, only assets with permitted ISIN numbers can be published. If no ISIN numbers are maintained, you can enter the ISIN number as a descriptive attribute.

11.1.4 Functional Attributes

Functional attributes are directly linked to the functions of the *Media Pool* module. The functions include, for example, asset versioning, publishing, and backups. The functional attributes describe the conditions in the relevant functions, for example, which version an asset has and whether it is published.

Print Quality

The *Print quality* attribute controls the *Suitable for Brand Templates* attribute (see the section *Usage*) and the function of rendering schemes (see *Rendering Schemes* on page 201).

Name	Description
Print quality (HiRes)	The attribute is activated automatically if one of the following conditions apply: • The asset resolution exceeds a specified value. The value is set to 300 dpi by default but may be defined differently for your system. If you have any questions, please contact your system administrator. • The asset does not have a resolution but is at least 2000 px × 2000 px. • The asset is a vector graphic. The attribute can be changed at a later stage.

Availability

As well as the assignment to a virtual database (VDB), the following functions determine the availability of an asset for the user. For more information, see *Visibility* on page 26.

Name	Description
Validity from/to	This displays the validity period defined in the attributes of the asset.
Hide if not valid	In the attributes of the asset, you can use the *Hide if not valid* checkbox to specify that the asset can be found only within its validity period.
Affiliate ID	The assignment of the asset to an affiliate

Safeguards

The module *Media Pool* has several mechanisms for ensuring the quality of the created assets as well as protecting their use. For more information, see *Protecting Assets* on page 177. The following attributes describe the settings.

Name	Description
Approval history	For assets that were uploaded to a virtual database (VDB) that requires approval, the following information is displayed: • The date on which the asset went through a workflow step defined for the VDB. • The name of the last completed workflow step. • The name of the user who processed the workflow step.
Subject to approval	If an asset requires approval, it cannot be downloaded until the owner has granted approval.
Reason for download restriction	Text which is entered in the *Reason for approval* field when requesting approval.
License information	Displays license information such as the license name, usage, or validity period for assets that require a license.

Versions

The *Versions* attribute describes the asset versioning. For more information, see *Versions* on page 140.

Name	Description
Versions	This displays the following information about the individual versions of the asset: • The version number of the asset • The name of the creator of the version • The date on which the version was created • The period in which the version was marked as official • The file name • The flag for marking the version as official • The flag for marking the version as published • The comment entered for the version. You can mark a version as official, save it as the original file or as a PDF, or delete it.

Structuring

The module *Media Pool* has several mechanisms for structuring the created assets. For more information, see . The following attributes describe the functions.

Name	Description
Average rating	Average value of ratings.
User ratings	List of ratings. The comments entered by the user, the user name, and the date and time of the rating are displayed.

Name	Description
Related assets	Assets that are flagged as related are displayed.
Variants	Assets that are flagged as variants are displayed.

Usage

Users can not only download assets directly, but also share them with individuals who are not registered users of the system. In addition, the assets can be used in different modules (for example, a product image can be used in the *Marketing Data Hub* module). The following attributes describe the usage, to be found in the detailed view below the *History* attribute panel, which you can expand by clicking on the name or the ⌄ arrow.

Name	Description
Download history	Information about each download of the asset by registered users: • Name of the user who downloaded the asset. • Date of download. • Information from the *Reason for use* field. For more information, see *Usage* on page 193.
Item number	Asset item number. The item number is used when the asset is used in the *Marketing Shop*, *Job Manager* and *Marketing Data Hub* modules. For more information, see *In Other Modules* on page 218.
Suitable for Brand Template Builder	This attribute controls whether assets are found when an asset search in the *Media Pool* module is triggered from the *Brand Template Builder* module. The attribute is archived automatically when the asset is created if the *Print quality* attribute is activated and the asset is created in the CMYK color scheme. The attribute can be changed subsequently so that the assets can be used in different color schemes or with a different resolution in Brand Template Builder.
Used in documents	This displays the asset ID, the asset title, and the version of the documents in Brand Template Builder in which the asset is used. For more information, see *In Other Modules* on page 218.

Name	Description
Used in templates	This displays the media ID, the media title, and the version of the template in which the asset is used. For more information, see *In Other Modules* on page 218.
Data Hub	This displays a link to the data sheet where the asset is used. You can open the data sheet information. For more information, see *In Other Modules* on page 218.
Jobs	This displays a link to the job data sheet where the asset is used. For more information, see *In Other Modules* on page 218.
Images used	Note: Only for InDesign documents. Asset ID, title, and the version of the assets that are used in the InDesign document. For more information, see *Using InDesign Files* on page 213.

Publication

If an asset is provided for publication on a channel, it is monitored by the system. In certain events defined for the channel in the *Administration* for the module , the third-party system is informed. The third-party system processes the asset based on its programming and, for example, posts the asset to a social media platform. Rendering schemes are used for publication through a channel. For more information, see *Publication Channels* on page 214.

Name	Description
Publish from	This displays the date from which the asset is or was published.
Publish to	This displays the date on which the publication ends or ended.

11.1.5 Standardized Attributes

This group includes data that is standardized by organizations and maintained in the metadata of the file, such as camera data or IPTC Photo data. The standardized attributes are read out of the file during upload and displayed in the *Media Pool* module as information about the asset. You cannot edit these attributes.

Note that this data is not re-read automatically. If you want to overwrite it, you must regenerate the preview message. This metadata is then overwritten.

The following groups of standardized attributes can be displayed in the *Media Pool* module:

Group Name	Associated Attributes
Camera Data	• Manufacturer • Model • Date time • Software
Video Data	• Frame Rate • Video Frame Width • Video Frame Height • Pixel Aspect Ratio • Tape Name • Scene • Shot/Take • Date Shot • Log Comment • Alternate Tape Name

Group Name	Associated Attributes
Audio Data	- Title - Created by - Album - Title Number - Genre - Composer - Technican - Date of publishing - Creation Date - Copyright - Comments - Instrument
Advanced XMP data	Display of XMP raw data
IPTC Contact	- Creator - Creator: Job Name - Creator: Address - Creator: City - Creator: State/Province - Creator: Postal Code - Creator: Country - Creator: Phone(s). - Creator: E-Mail(s) - Creator: Website(s)

Group Name	Associated Attributes
IPTC Content	• Headline • Description • Keywords • ITPC Subject Code • Description Writer
IPTC Image	• Creation date • Intellectual Genre • IPTC Scene Code • Sublocation • City • State/Province • Country • ISO Country Code
IPTC Status	• Title • Job Identifier • Instructions • Credit Line • Source • Copyright Notice • Copyright-Status • Rights Usage Terms

Note

If XMP data is maintained in the images to be imported, the keywords are extracted while importing TIFF files and JPEG files and written to the Tags metadata field in the *Media Pool* module.

11.2 Default Rendering Schemes

The following rendering schemes have been created by default. Note that your system administrator may adjust the standard rendering schemes. If you have any questions, please contact your system administrator.

PDF

This allows you to create and send PDF files quickly and easily.

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
DOC, DOCX XLS, XLSX PPT, PPTX DOTX XLTX POTX BMP TIF, TIFF JPEG, JPG PNG GIF WMF EPS	PDF Med-Res	—	—	150	No	No	No	No
INDD, IDML	PDF Med-Res	Dependent on job options			No	No	No	No

Presentation

This is suitable for use in MS Office applications.

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
DOC, DOCX XLS, XLSX PPT, PPTX DOTX XLTX POTX	Original	–	–	–	–	–	Yes	No
BMP TIF, TIFF PSD JPEG, JPG	JPG	RGB 24-bit	100	150	Yes	No	No	No
PNG	PNG	RGB 24-bit	–	72	Yes	No	No	No
GIF	GIF	RGB, 8 bit	–	72	Yes	No	No	No

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
WMF	Original	—	—	—	No	No	No	No
EPS AI	PNG	RGB	100	150	Yes	No	No	No
INDD, IDML	PDF Med-Res	Dependent on job options			No	No	No	No

Print

You can download high resolution files for production printing.

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
BMP	TIF	RGB 24-bit	—	300	Yes	No	No	Yes
TIF, TIFF PSD EPS AI	TIF	CMYK	—	300	Yes	No	No	Yes
JPEG, JPG	JPG	CMYK	100	300	Yes	No	No	Yes
PNG GIF	Original	—	—	—	Yes	No	No	Yes
INDD, IDML	PDF High-Res	Dependent on job options			No	No	No	Yes

Web

You can save images in formats that are suitable for websites or digital media.

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
DOC, DOCX XLS, XLSX PPT, PPTX DOTX XLTX POTX	PDF Low-Res	—	—	72	—	No	No	No
BMP TIF, TIFF PSD JPEG, JPG	JPG		70	72	Yes	No	No	No
PNG GIF	Original	—	—	—	Yes	No	No	No
WMF EPS AI	PNG	RGB 24-bit	—	72	Yes	No	No	No

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
INDD, IDML	PDF Low-Res	Dependent on job options			—	No	No	No

Original

This saves the original file of the asset.

Input format	Output format	Color space	Compression [%]	Resolution [DPI]	Allow editing	Allow download without approval	Allow download of original file for all users	Allow download of print quality files for all users
All formats	Original file	—	—	—	—	No	Yes	No

11.3 Output Formats

To a limited extent, the assets can be converted to other file formats for further use.

The following table lists the options available in *Media Pool* for converting various source formats to an output format.

AI (Adobe Illustrator)

Output format	Color depth (bit	Quality [%]	DPI	Allow editing before download
JPG	8, 24	30-100	72, 150	Yes
TIFF	8, 24, RGB, CMYK		72, 150, 300	Yes
BMP	8, 24		72, 150	Yes
GIF	8		72	Yes
PNG	8, 24		72, 150	Yes
AI	8, 24		150	Yes
Original				

EPS

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
JPG	8, 24	30-100		RGB, CMYK	72, 150, 300	Yes
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB		Yes
EPS	24			RGB	150	
PDF Low-Res						
PDF Med-Res						
PDF High-Res						
Original						

PS

Output format	Color depth (bit)	Quality [%]	DPI	Allow editing before download
JPG	8, 24	30-100	72, 150	Yes

Output format	Color depth (bit)	Quality [%]	DPI	Allow editing before download
TIFF	8, 24, CMYK		72, 150, 300	Yes
BMP	8, 24		72, 150	Yes
GIF	8		72	Yes
PNG	8, 24		72, 150	Yes
PS	8, 24		150	
PDF LowRes				
PDF MedRes				
PDF HiRes				
Original				

JPG / JPEG

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	24	30-100		RGB, CMYK	72, 150, 300	Yes

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
TIFF	8, 24		None	RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 150	Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

BMP

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	8, 24	30-100		RGB	72, 150	Yes
TIFF	8, 24		None	RGB	72, 150, 300	Yes
BMP	24			RGB	72, 150	Yes

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 150	Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

TIFF

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	8, 24	30-100		RGB, CMYK	72, 150, 300	Yes
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 150	Yes
PDF Low-Res						

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
PDF Med-Res						
PDF High-Res						

JPEG

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	8, 24	30-100		RGB, CMYK	72, 150, 300	
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 150	Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

PNG

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	8, 24	30-100		RGB	72, 150	Yes
TIFF	8, 24			RGB	72, 150	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB		Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

INDD

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
IDML						

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
PDF Low-Res						
PDF Med-Res						
PDF High-Res						
PDF Ultra High-Res						

IDML

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
INDD						
PDF Low-Res						
PDF Med-Res						
PDF High-Res						
PDF Ultra High-Res						

Office Files

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

PDF

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
PDF Low-Res						
PDF Med-Res						

WMF

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
JPG	8, 24	30-100		RGB, CMYK	72, 150, 300	
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 15	Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

PSD

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
JPG	8, 24	30-100		RGB, CMYK	72, 150, 300	
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes
PNG	8, 24			RGB	72, 150	Yes

GIF

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						
JPG	8, 24	30-100		RGB	72, 150	Yes
TIFF	8, 24			RGB, CMYK	72, 150, 300	Yes
BMP	8, 24			RGB	72, 150	Yes
GIF	8			RGB	72	Yes

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
PNG	8, 24			RGB		Yes
PDF Low-Res						
PDF Med-Res						
PDF High-Res						

Videos

Output format	Color depth (bit)	Quality [%]	Compression	Color space	DPI	Allow editing before download
Original						

Diese Seite wurde leer gelassen, damit neue Kapitel auf den richtigen (ungeraden) Seiten beginnen.

GLOSSARY

A

Asset

In the field of Digital Asset Management (DAM), an asset refers to digital files or content such as images, video, audio, documents, or other digital resources, including metadata and rendering information in the Media Pool module.

Asset Type

Asset types are central elements in digital asset management (DAM) that define the structure and management of digital assets. They determine which attributes are available for an asset and how they are configured.

C

Collection

A summary of assets created by a user.

D

Digital watermark

Encrypted information in a downloaded file, with the aim of controlling the use of the file.

F

Favorites

You can access assets that you mark as favorites quickly by choosing > Media Pool > Collections > My Favorites.

K

Keyword

Keyword created by a user.

L

Licenses

Legally valid approval, granting the right to use an asset under defined conditions.

List View

In the list view, additional properties are displayed next to the preview image of the asset. An administrator can specify which properties are to be displayed in the list view.

M

Metadata

Metadata in Digital Asset Management (DAM) is structured information that provides descriptive details about an asset. It includes descriptive information such as title, description, and keywords; technical information such as file format and resolution; rights and licensing information; and temporal and relationship data. Metadata helps identify, organize, and search for assets within the Media Pool module.

O

Owner

The owner is the person responsible for an asset. The owner also processes requests for download approval.

R

Related Assets

You can flag assets that belong together as related to each other. You can also define the type of relationship in the properties.

Rendering

Rendering is the process of creating an image or animation using computer software. Rendering information is important. It ensures that assets are displayed or rendered correctly.

Rendering Schemes

In rendering schemas, the options for downloading / storing assets are grouped into different categories or uses. For example, the rendering scheme Presentations determines in which output formats various input formats (such as DOC, PNG, or JPEG) are automatically provided for use in MS PowerPoint.

S

Structured Keyword

Keyword that is centrally created, edited and managed by an administrator.

T

Theme

Aspect of an asset, like target group or product. Themes are created and displayed hierarchically in a tree structure. Several themes can be assigned to an asset.

Thumbnail View

The thumbnail view is a purely visual display of assets - no additional information about the asset (such as media title, dimensions, or owner, for example) is displayed.

V

Variant

To group together assets that are identical in terms of content (for example, images in a series, in different languages, or in different colors), you can create the assets as variants of a master asset. Structure media objects and mark them as belonging together. Only the master asset is displayed in search results. Access all the variants quickly and easily using the detailed view of the master media object.

Virtual Database (VDB)

Storage area for managing assets. The VDB decides whether the security mechanisms Upload Approval and Watermark are available.

W

Watermark

Control mechanism of a VDB that irrevocably changes an asset prior

to downloading to understand its
use outside the Media Pool.