MediaBeacon 21.03

Welcome to MediaBeacon's User Guide

05 - 2021

ESKO

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1. Welcome to MediaBeacon's User Guide

Welcome to MediaBeacon's guide for users of our product. It will review the various functions of MediaBeacon in a non-customized setting, showing both typical usage and optional configurations. Note that your installation may not make available all possible functions to all users.

Using this Guide

- To navigate through this guide, use the # icons to expand the Table of Contents panel, and click the topic name to read that entry.
- To search across all topic for a text string, use the search field in the upper left corner.
- To download a PDF version of the complete guide, click the "PDF Version" link in the upper right corner of the page.
- To return to the list of all MediaBeacon documentation, click "Other MediaBeacon documentation" in the upper right corner of the page.

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3. Library Services

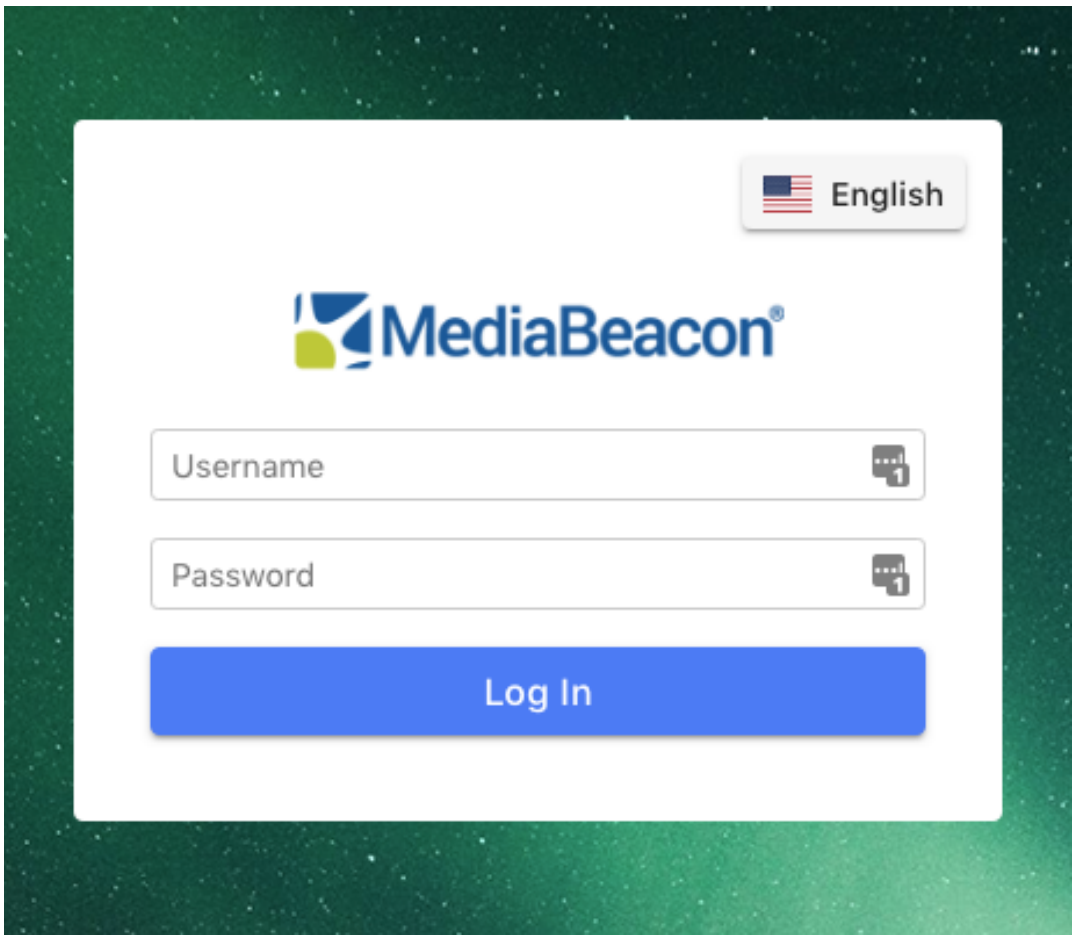
This section details the base functions of MediaBeacon that users will encounter.

Some functionality is optional as part of an add-on product or is intended for administrators.

3.1. Introduction to Web UI

An overview of the basic parts of the Web UI, which will be referred to in the rest of this manual.

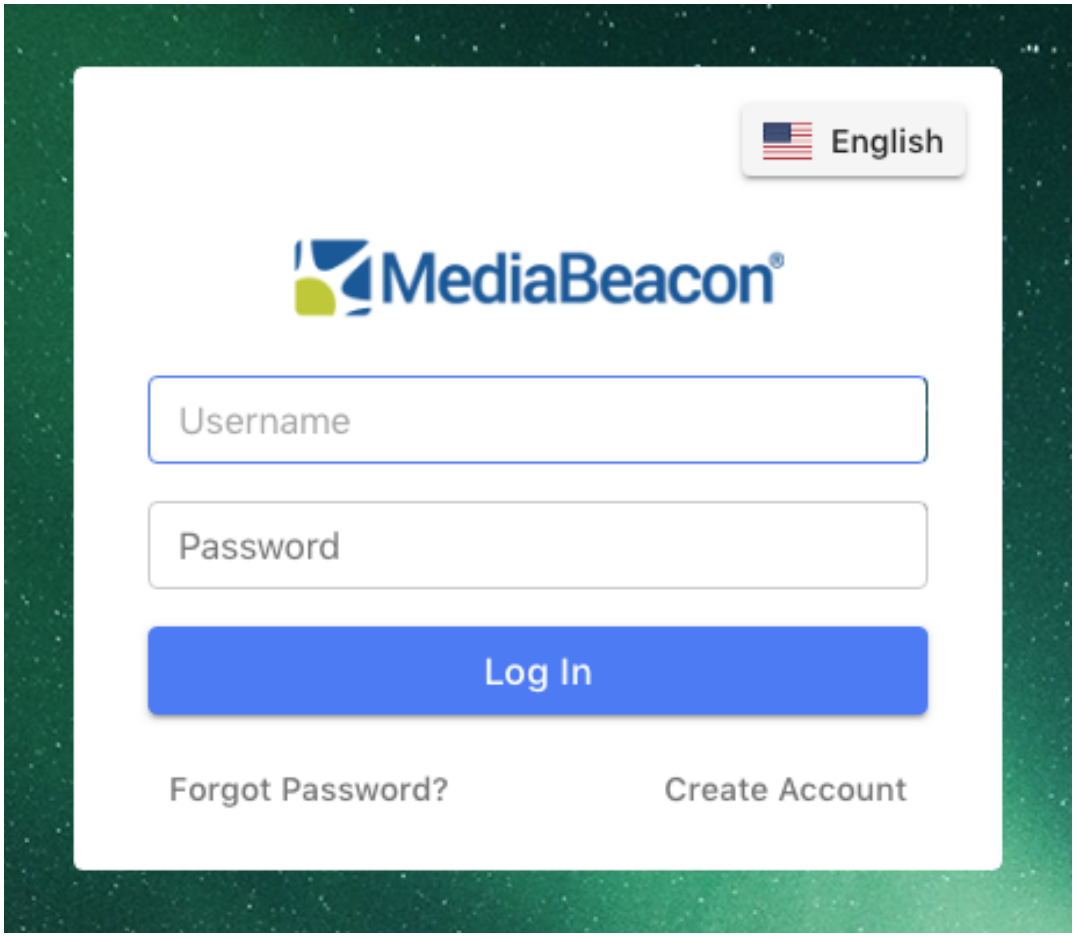
3.1.1. Login



This interface allows users to login to MediaBeacon using either a local account (that is, an account managed by the MediaBeacon system), or authenticate against an Identity Provider (IDP) connected to MediaBeacon.

In some cases, users may bypass this interface when their organization uses a single sign on (SSO) or similar user authentication solution.

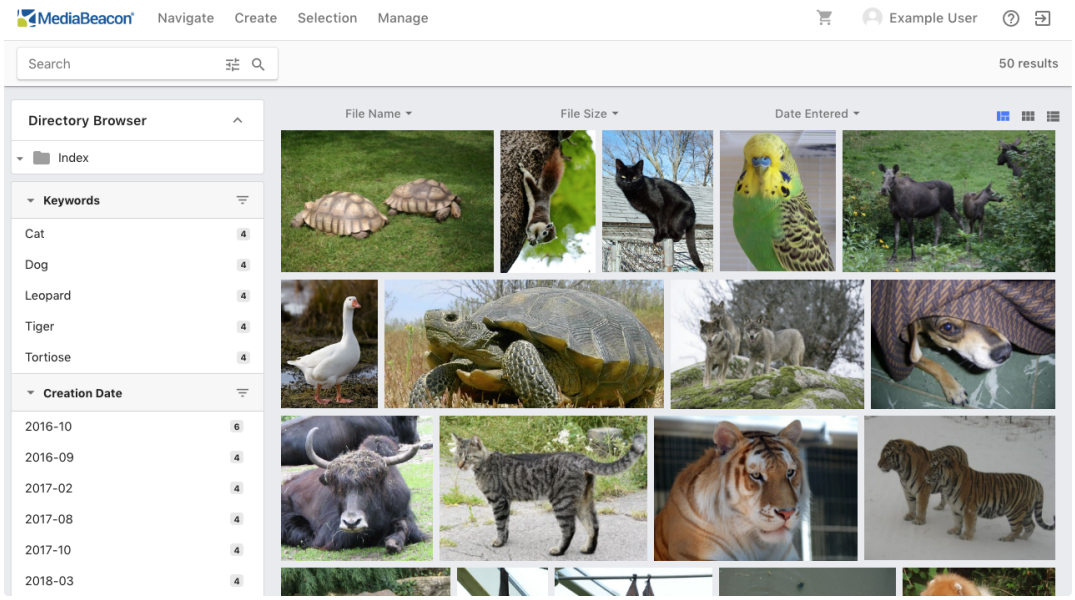
When local accounts are in use, the following links may be available:



- **Forgot Password:** Allows the user to send an email requesting password assistance to system administrators.
- **Create Account:** Allows users to enter a pre-generated code to create a local account.

Once logged in, the user will be redirected to the MediaBeacon Web UI.

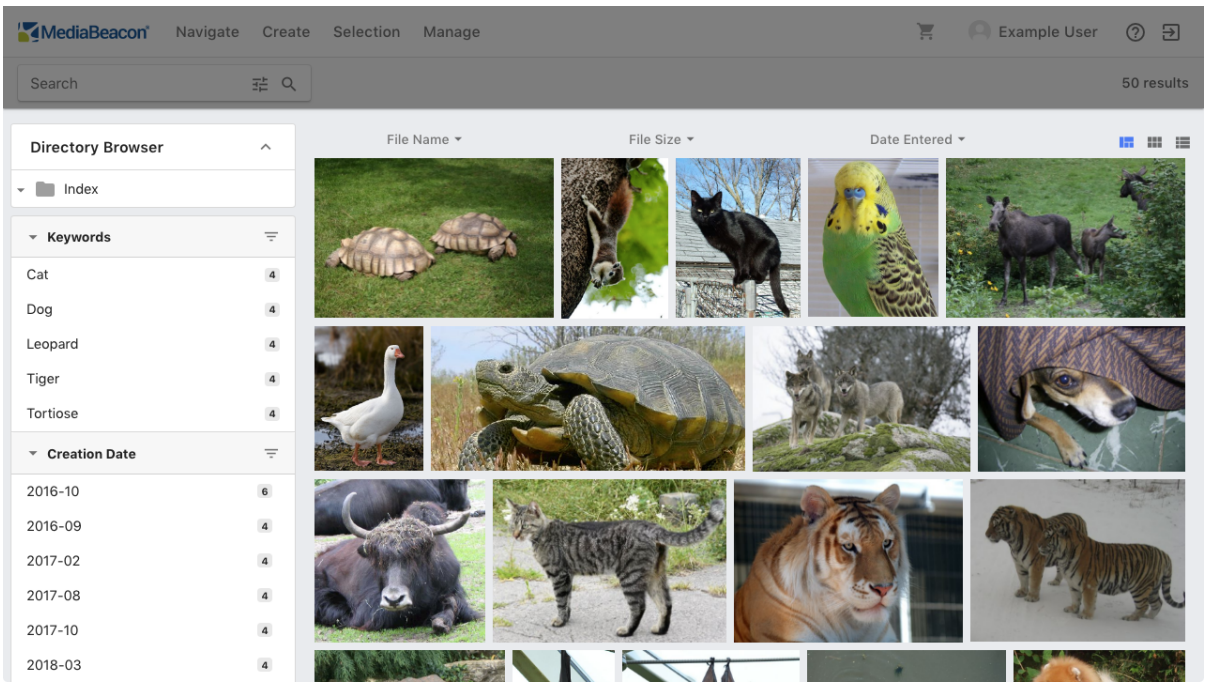
3.1.2. Workspaces



MediaBeacon's Web UI allows users to view and interact with interface elements and data in the **workspace**. It can contain different arrangements of interface elements called **components.**

Users may have access to one or more workspaces, depending on what components are required for a given set of tasks.

3.1.3. Components

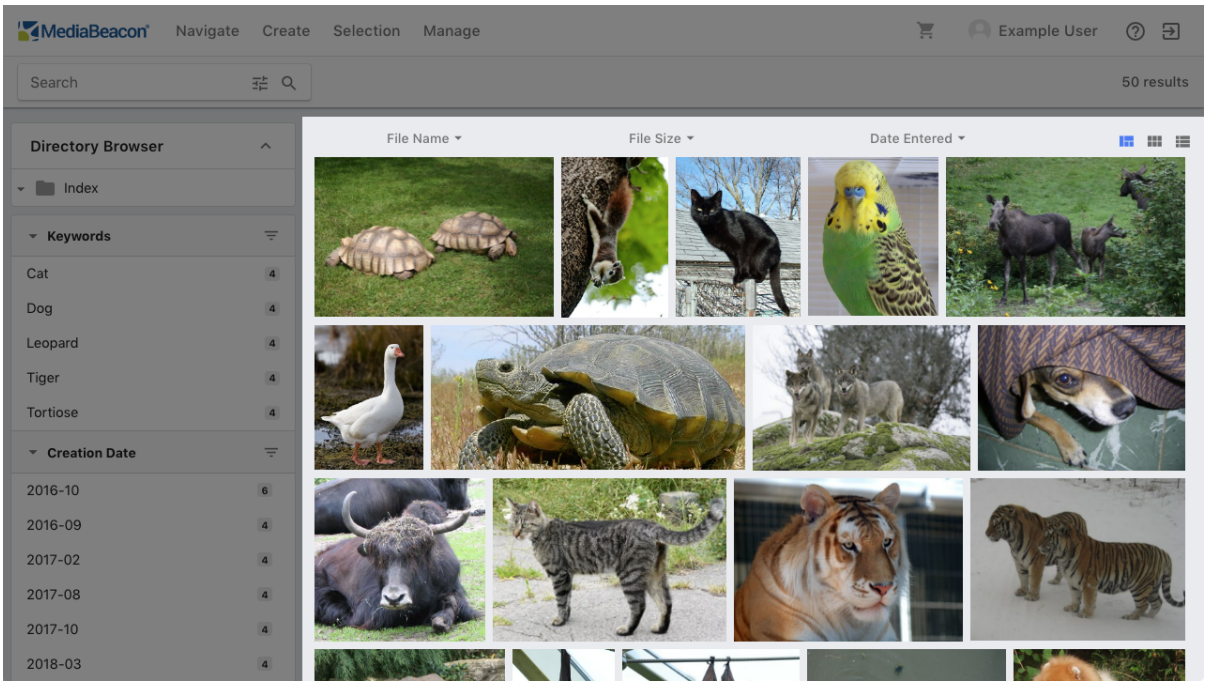


In the Web UI, the term component refers to a set of interface elements that interact with the UI as a whole. For example, the Quick Search component allows the user to search for **assets** in MediaBeacon by entering a string of text to conduct a search.

Components may be placed in different areas of the workspace,.

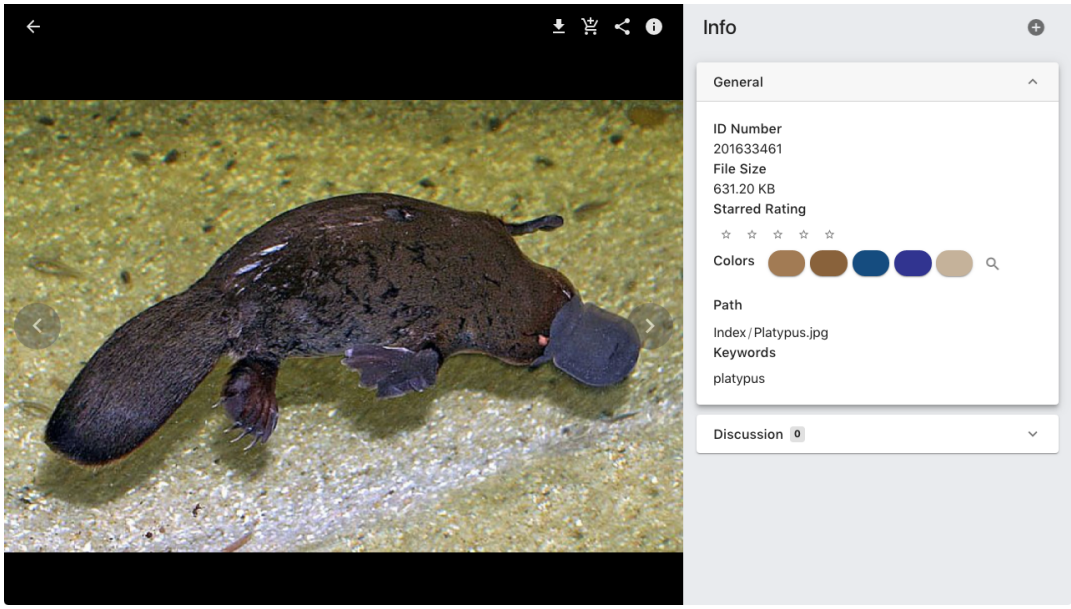
There is a wide range of components available and many have administrator configurable options that change their functionality depending upon user needs. Note: In previous versions of MediaBeacon, components were referred to as **widgets**.

3.1.4. Assets



Files that are stored in MediaBeacon are referred to as assets. MediaBeacon can store any type of file and will create preview images for a wide range of file types.

3.1.5. Asset ID



Every asset has a number called the Asset ID (also referred to as the Record ID). This is an automatically assigned and non-editable value, unique to a specific asset in a specific MediaBeacon system.

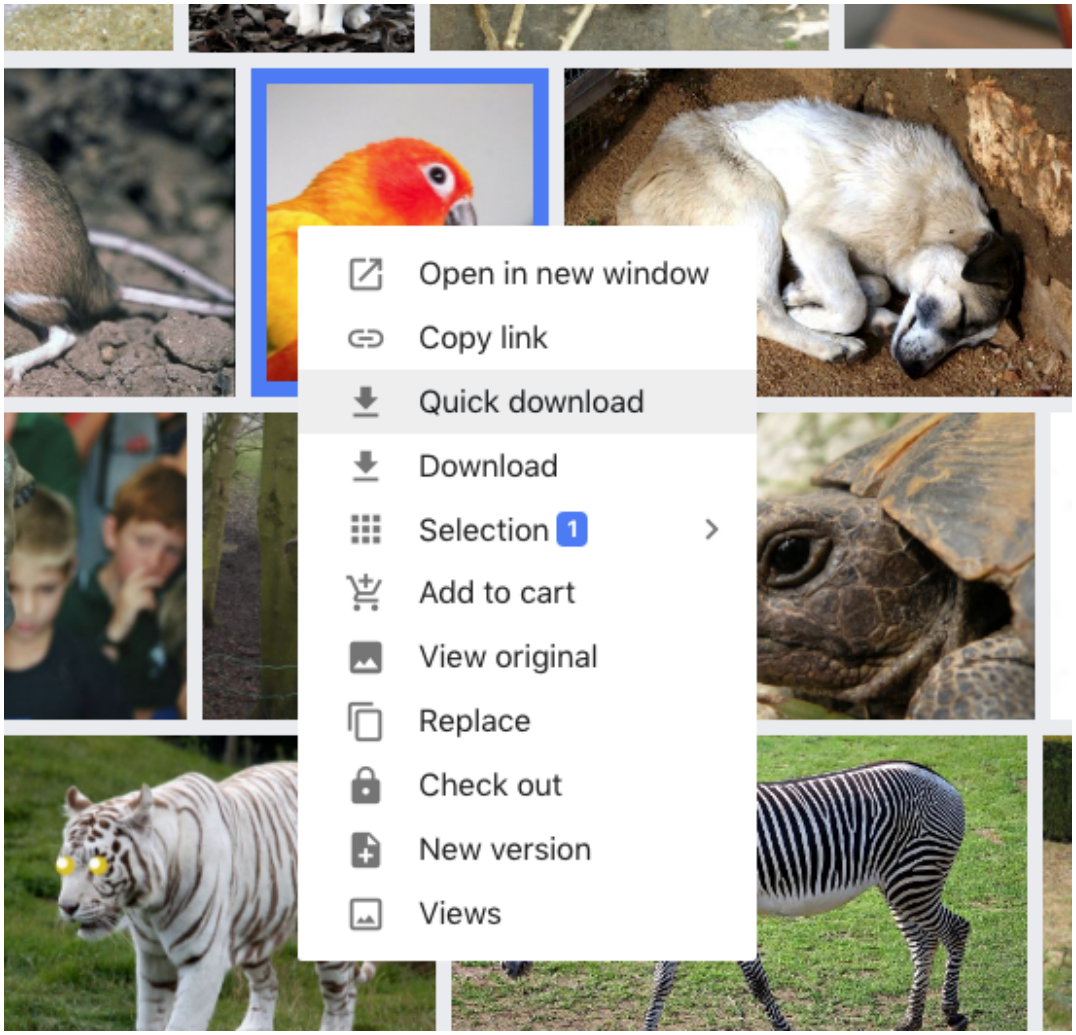
If an asset is downloaded and uploaded to MediaBeacon, where another asset holds that number, a new Asset ID will be assigned to the newer upload. This is common if an asset is downloaded and then re-uploaded to the same MediaBeacon instance.

3.1.6. ACLs

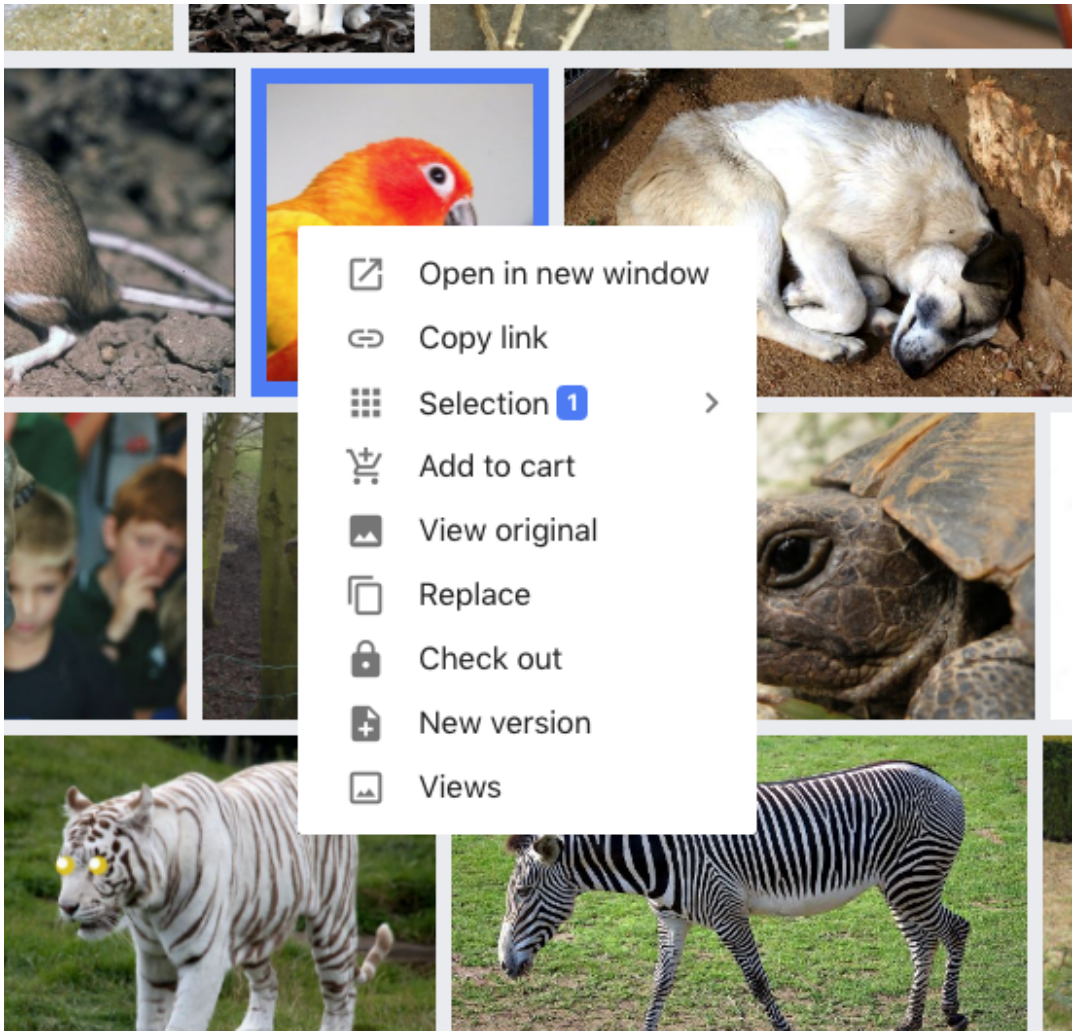
User accounts are assigned to one or more **access control lists**, or ACLs.

Depending on the privileges granted by a given ACL, the user is allowed to use various functionalities involving assets, such as: uploading, reading and writing **metadata**, searching, or downloading. ACLs also grant access to specific workspaces, and to access specific sets of assets.

For example, in one ACL, a user might have the ability to download assets, and in another, they might be restricted from doing so.



Normal Contextual Menu

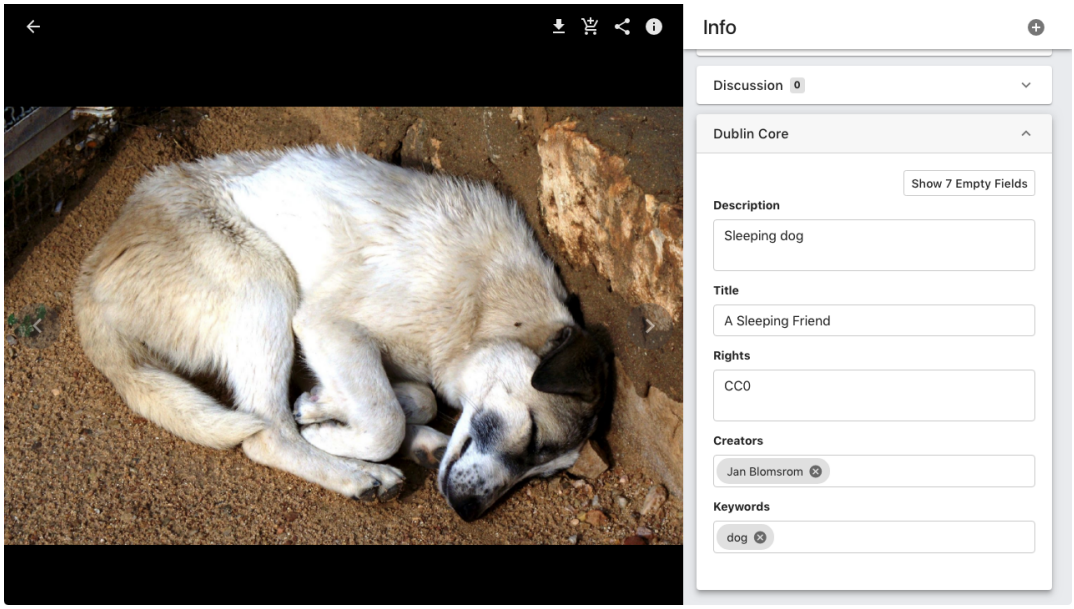


Contextual Menu with download restriction

3.1.7. Metadata

Metadata (data about data) is stored in MediaBeacon using the XMP format, which is written into the assets themselves. This allows the metadata to stay attached to the asset anywhere it goes so the metadata is readable to a wide variety of other applications.

The most common way to display metadata in MediaBeacon is by using the **Form**, which collects several metadata fields together into one interface element.



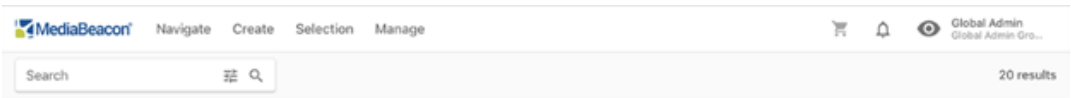
Many metadata fields are based on industry standards, but it is quite likely that your organization will have unique fields and Forms in which to display them.

3.2. Workspace Basics

This section covers the basics of workspaces. The workspace shown here is the default "Infinite Scroll" preset workspace.

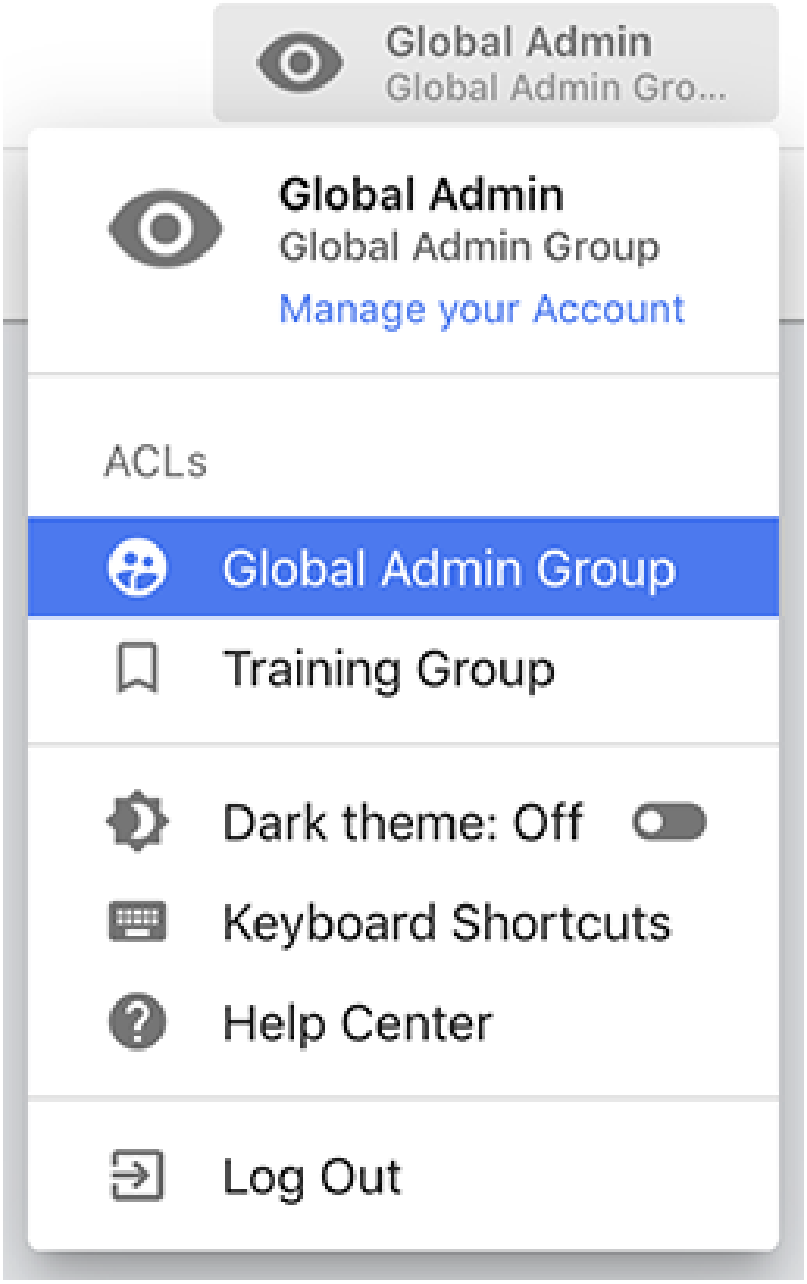
3.2.1. Menu Bar

The menu bar contains a number of elements:

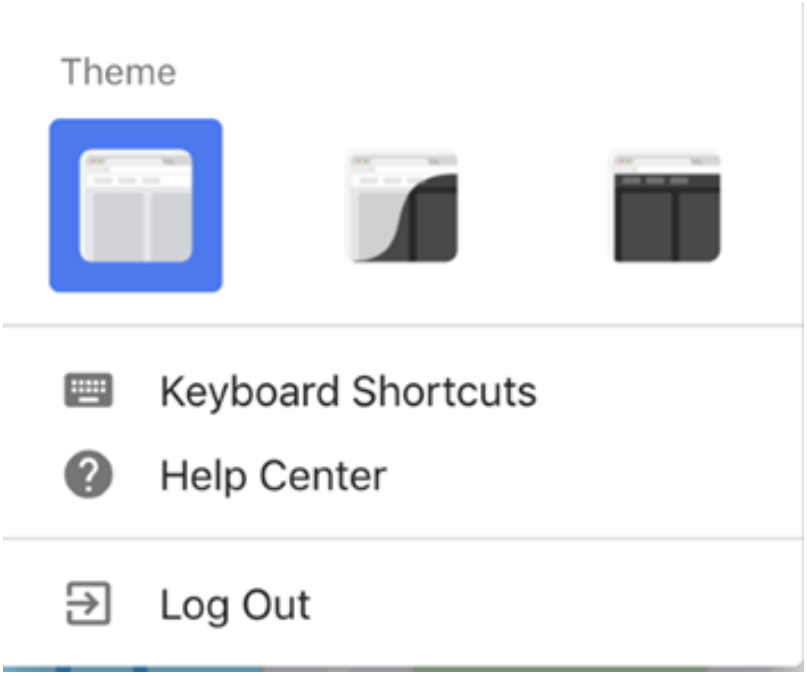


This menu combines several functionalities:

- User Profile functionality, displaying the user's name, icon, and current ACL.
- "Manage Your Account" opens the Contact Information dialog.
- ACLs: replaces the ACL Menu, listing all accessible ACLs.
- Theme Switching: Allows users to change between the default Grey them and the optional Dark Theme.
- Keyboard Shortcuts: Displays the list of keyboard shortcuts in the MediaBeacon Web UI.
- Help Center: Provides a link to online documentation.
- Log Out: Logs the user out of MediaBeacon.



In the User Menu, the Theme section has been expanded to show 3 icons. These#that allow the user to change between Grey#and Dark mode, and a new selection#in the middle#that willMediaBeacon to match the desktop OS's Dark mode setting.



3.2.2. Search Bar

- **Quick Search Component:** Allows the user to search for assets by entering a string.
- **Search Status Component:** Displays the current search criteria.

3.2.3. Component Layout Zone

- **Search Filter Component:** Allows the user to search for individual pieces of metadata or convergences thereof.
- **Infinite Scroll View Component:** Allows the user to see all assets that the current search returns, and to perform a variety of functions to them.

3.2.4. Notification Center

The popup dialog will be displayed when a background task is initiated. Examples of background tasks include: downloading a conversion, metadata writing, moving or copying assets. The Notification Center will visually indicate when a task is in progress and when it is completed.

The Notification Center toggles between open and closed the by clicking on the title of the popup.

- Added Workflow Notifications
- Added Discussion Notifications.
- Repeated notifications show as a single notification with a counter.

System wide notifications can be set to display at the top of users' notifications.

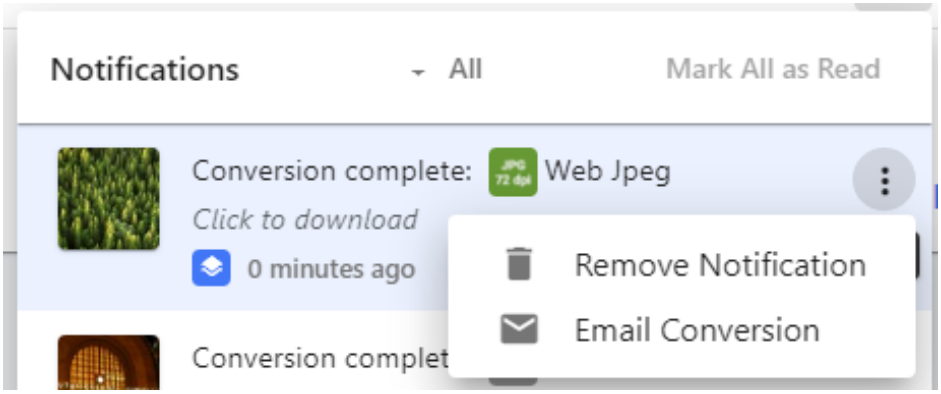
Available Conversions

Downloads that are being converted may be queued in the Notification Center's Available Conversions area.

The Notification Item Menu reflects the default configuration for conversions. However, the best practice configuration of Download Presets would use the "Download on Conversion Complete" option. This will cause a Conversion Download to skip a "Loading Dock" or other interstitial state, downloading automatically when the conversion has been completed. The toast message and notification are still shown but download itself is automatic

Notification Item Menu

The user can use the drop-down menu located on the notification to Remove Notification if they no longer require the conversion. If the user's group has the proper email permission, they can also select Email Conversion to email the converted asset.

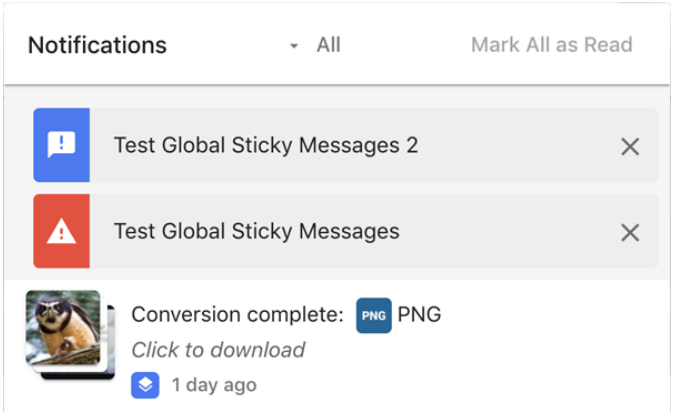


Note: Conversions are retained as long as the notification itself is retained.

Sticky Notifications

Sticky Notifications are a new type of notification that are displayed above other notification types in the Notification Menu and in the "Show More" notification dialog.

These messages can have a red or blue icon, and can be sent to individual users or all users of the system. They may also be created as links, a user's browser opening a new browser tab to a predefined URL.



Asset Icons

Each Icon represents a specific conversion of a specific asset.

Asset Badge Buttons

- Download: An arrow icon, that downloads the conversion.
- Delete: An "x" icon that will delete the conversion.
- Conversion Badge: Notes what preset was used to create the conversion.

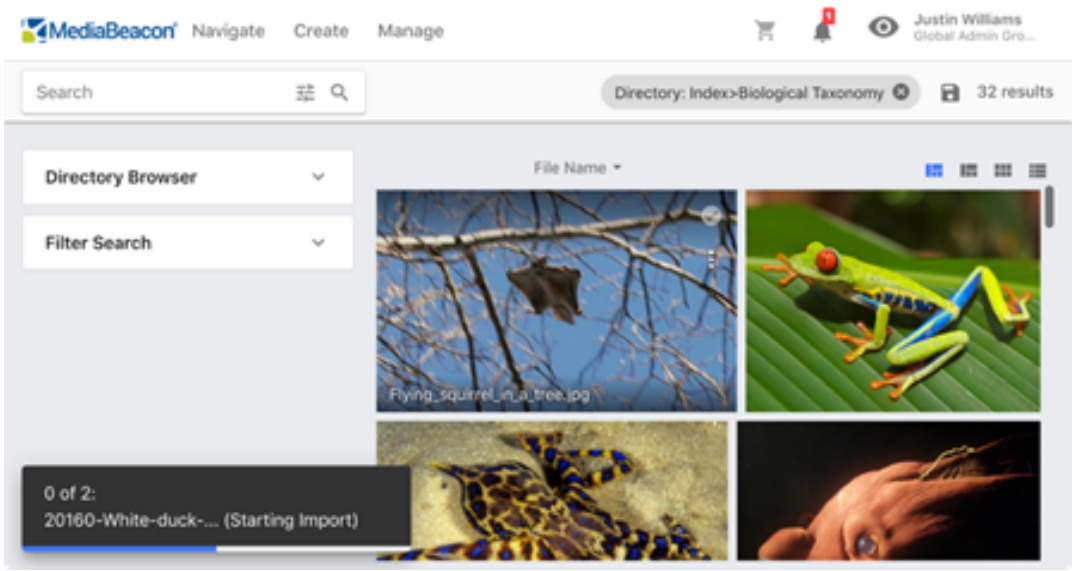
Buttons

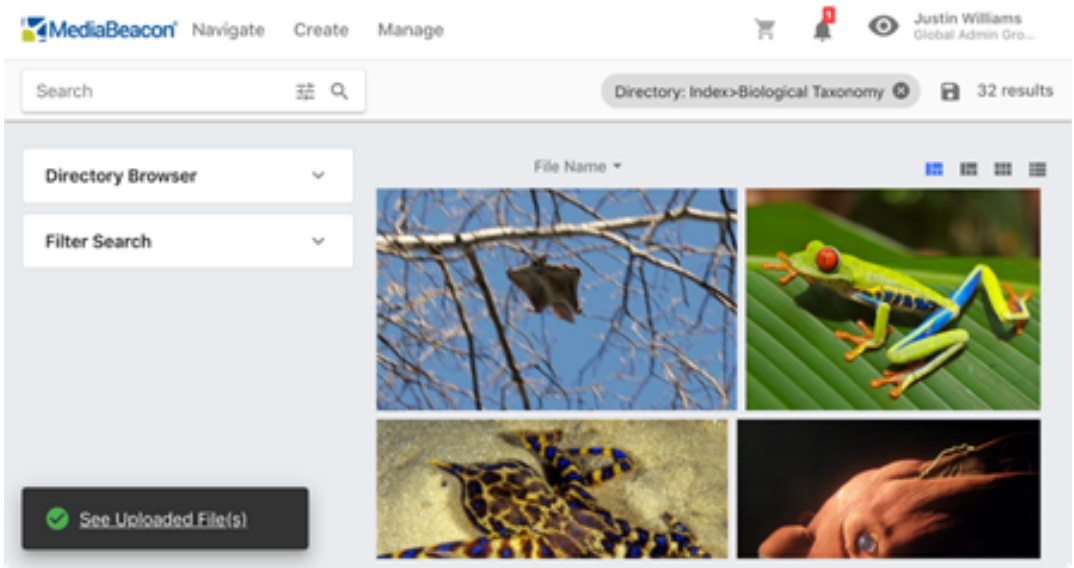
The buttons on the lower part of the available conversion area have the following functions:

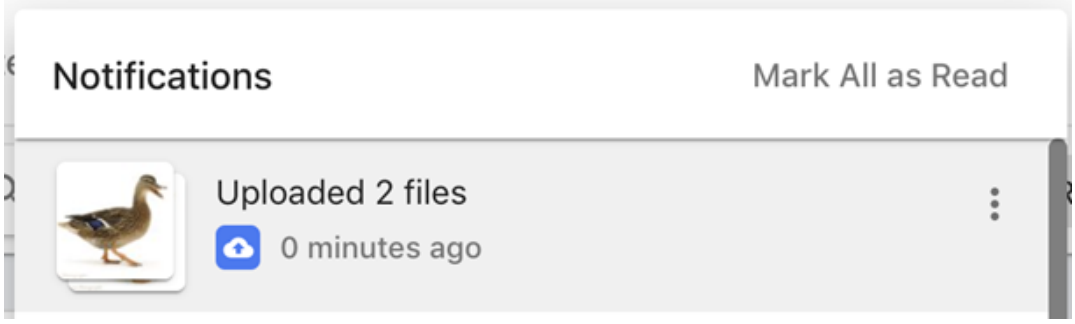
- **Download All**
  - Downloads all the conversions in the available conversions area.
- **Email All**
  - Emails all the conversions in the available conversions area.
- **Remove All**
  - Deletes all conversions.

Toast Notifications

The upload process will now be visible through#toast#progress bars. The completion of the upload will trigger a bell menu notification bell and allow the user to view the uploaded assets within the view component.

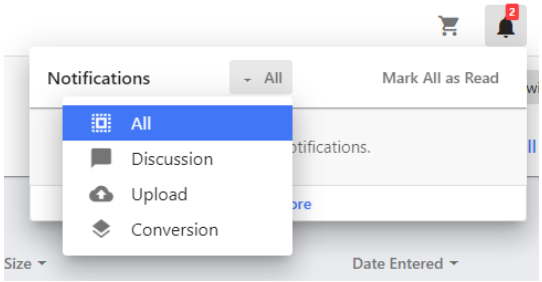

MediaBeacon
Navigate
Create
Manage
Justin Williams
Global Admin Gro...
Search
Directory: Index>Biological Taxonomy
32 results
Directory Browser
Filter Search
File Name
Flying_squirrel_in_a_tree.jpg
0 of 2:
20160-White-duck-... (Starting Import)


MediaBeacon
Navigate
Create
Manage
Justin Williams
Global Admin Gro...
Search
Directory: Index>Biological Taxonomy
32 results
Directory Browser
Filter Search
File Name
See Uploaded File(s)


Notifications
Mark All as Read
Uploaded 2 files
0 minutes ago

Notification Menu Filtering

The Notification Menu contains a filtering feature. Users can now filter for different types of notifications in their notification panel, as seen below.



3.2.5. Workspace Tab

Workspace tabs are an alternative to using the Navigation menu, allowing the user to navigate between workspaces by clicking a button control rather than using a menu. This option will be set by an administrator, if used.

3.2.6. General Components Area

This area of the workspace is where most components may be found.

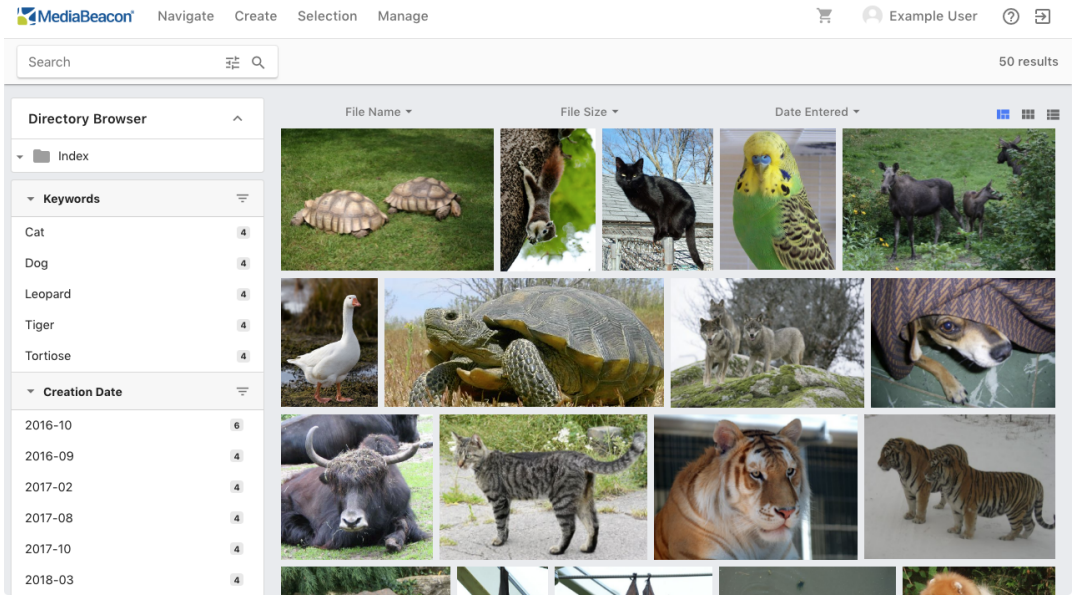
3.3. Component Basics

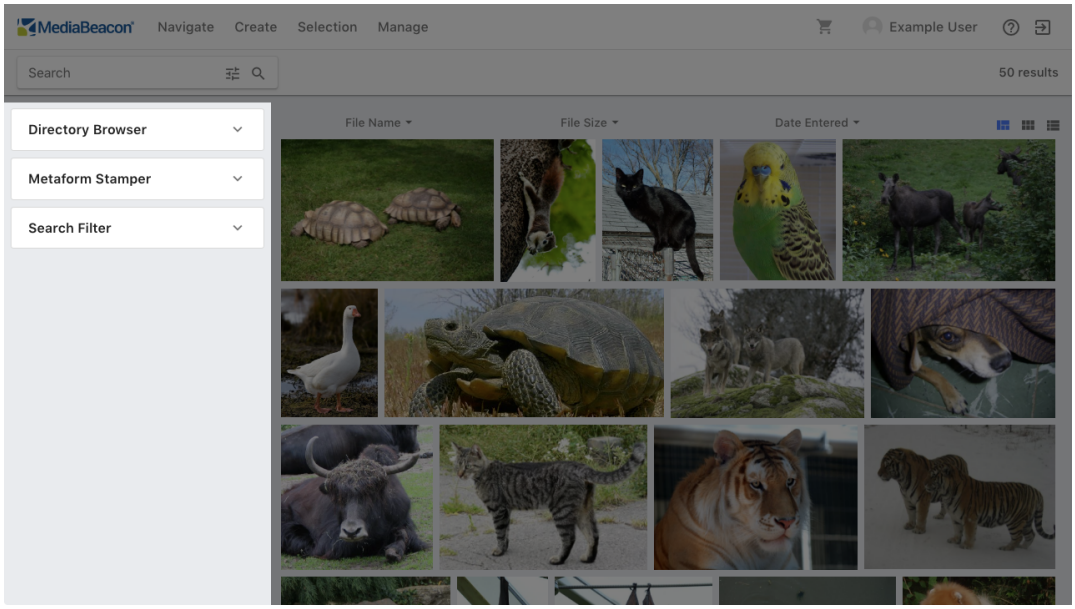
The majority of user interaction with MediaBeacon is performed through components. Components are interface elements within MediaBeacon that allow a user to perform specific functions, often interacting with other components in the process.

3.3.1. Component Visibility

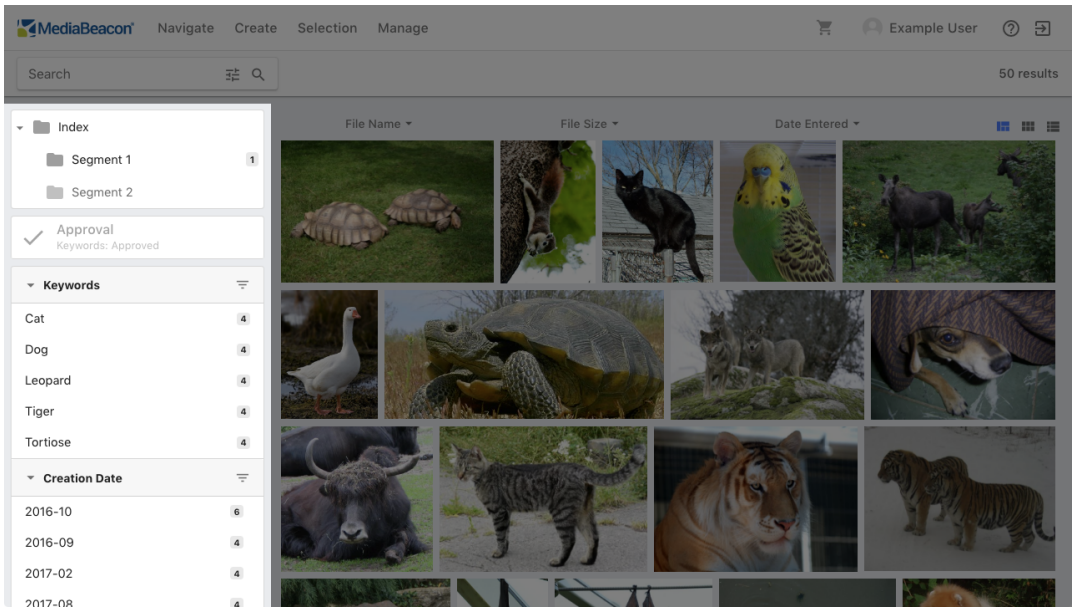
Components have several states of visibility:

- **Titles Displayed:** The component title will be displayed as a spindown element. Clicking here will collapse the component to show only the title, and in the collapsed state, clicking the title will expand the component.

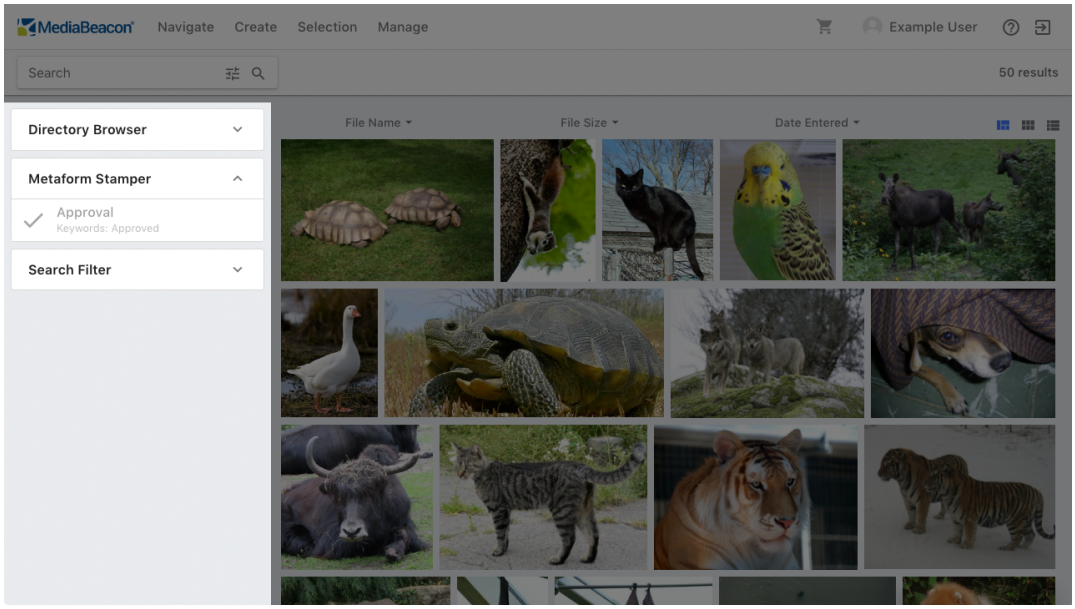




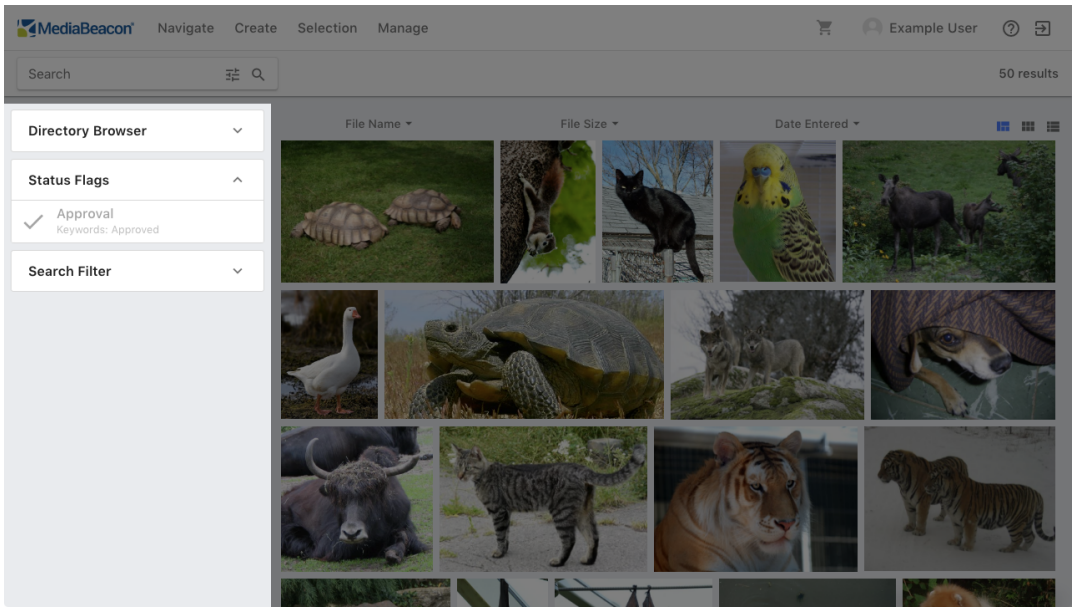
- **Titles Hidden:** The title of component is hidden, and the component is always displayed



- **Toggleable:** The titles are displayed but only one component in a column may be open at a time; any other component open in that column will collapse when another is expanded.



- **Custom Title:** Component titles may be changed from their default string.


MediaBeacon
Navigate
Create
Selection
Manage
Example User
Search
50 results
Directory Browser
Status Flags
Approval
Keywords: Approved
Search Filter
File Name
File Size
Date Entered

3.4. Contexual Menu Basics

Right clicking in many areas of the Web UI will display a contextual menu.

3.4.1. Contexual Menu Examples

- Components have unique contextual menus.

Figure 1: Contextual Menu for any View component

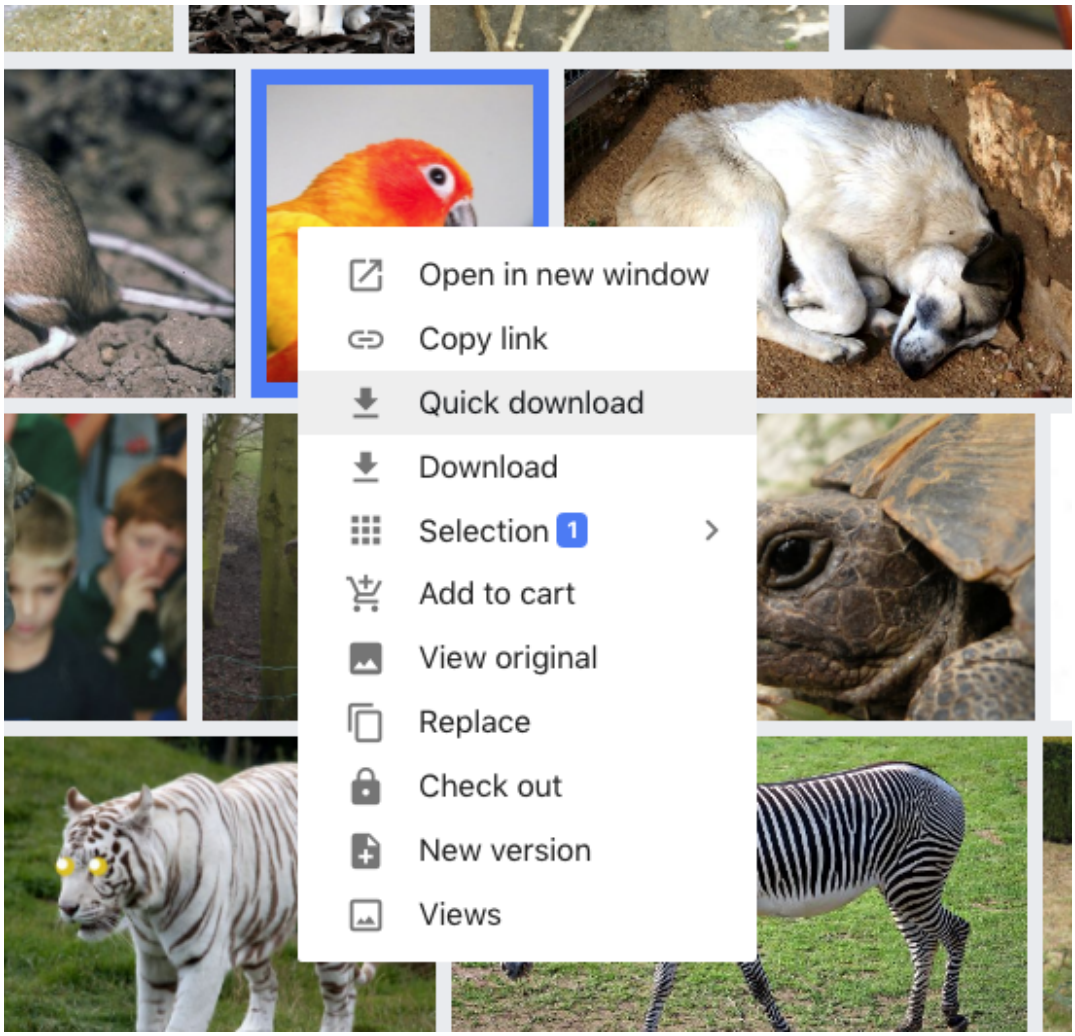
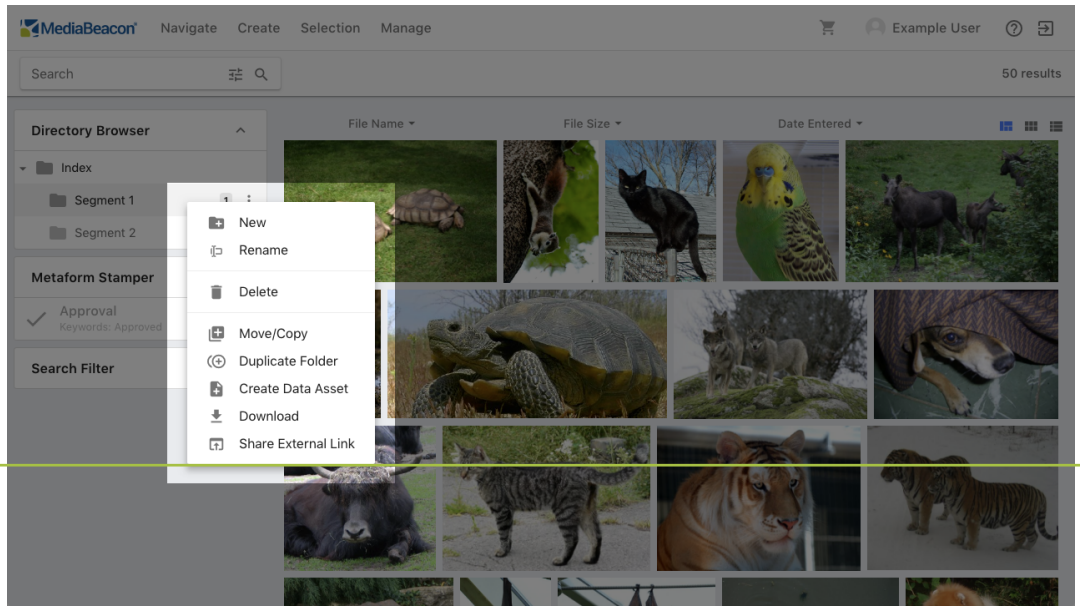
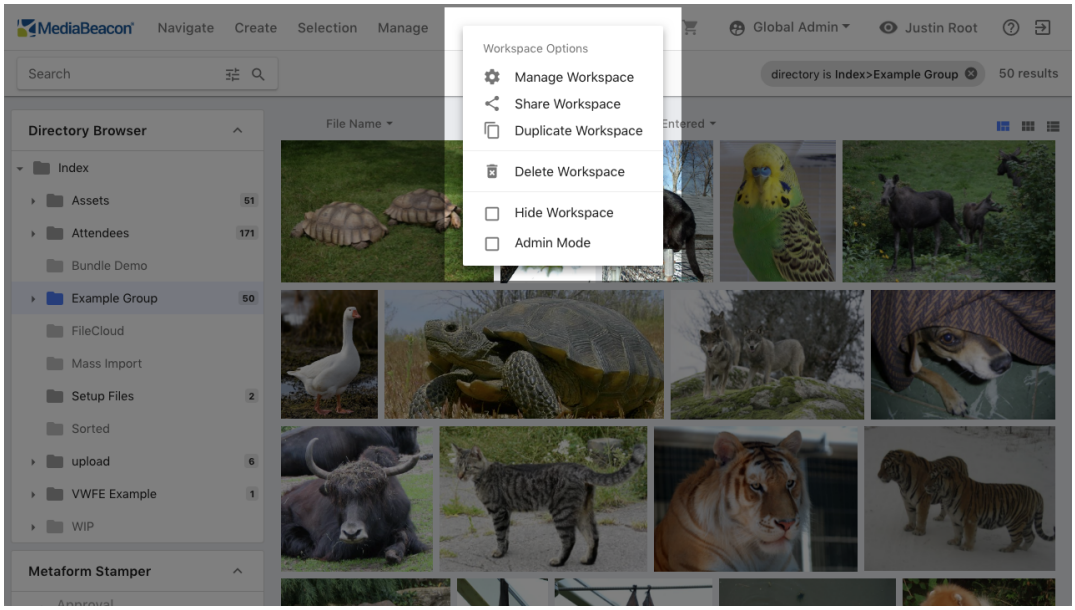


Figure 2: Contextual menu for the Directory Browser component



- The Workspace Options contextual menu is normally only displayed for administrators.



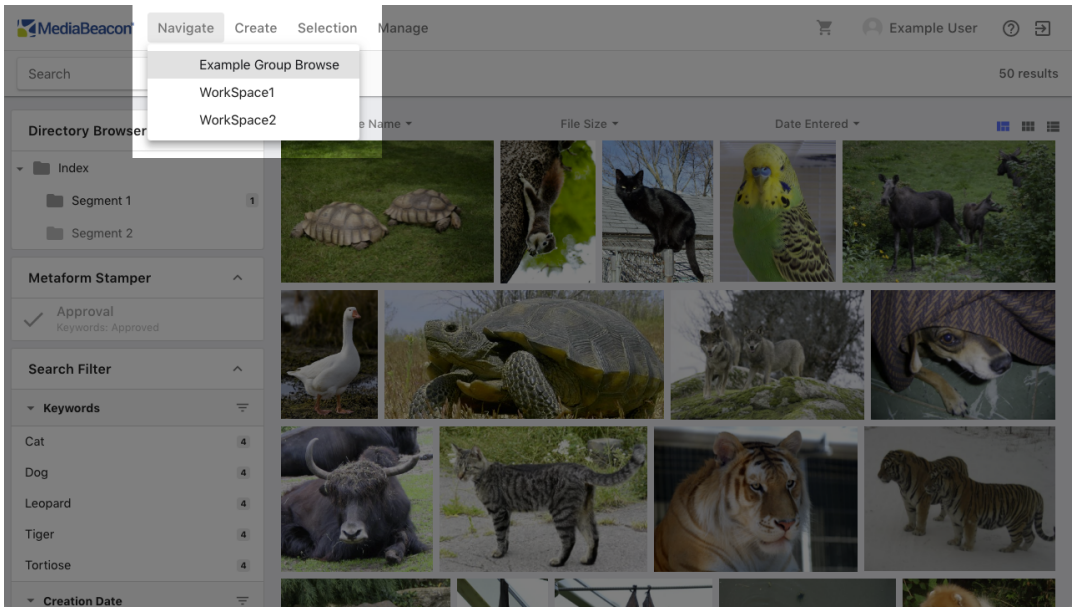
- This menu is displayed when right clicking on empty areas in the:
  - Menu Bar
  - Search Bar
  - General Components Area, where no component is resident
  - Workspace Tabs

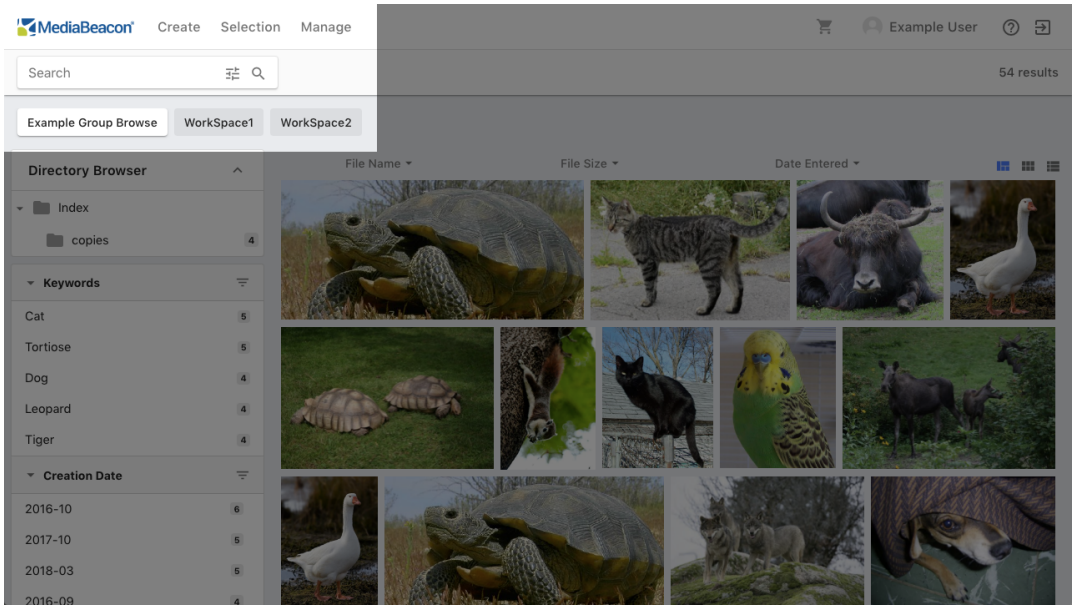
3.5. Navigating Basics

There are several ways to navigate between interfaces in the MediaBeacon Web UI. Users may want to switch workspaces and ACLs based on the tasks they need to perform.

3.5.1. Switching Workplaces

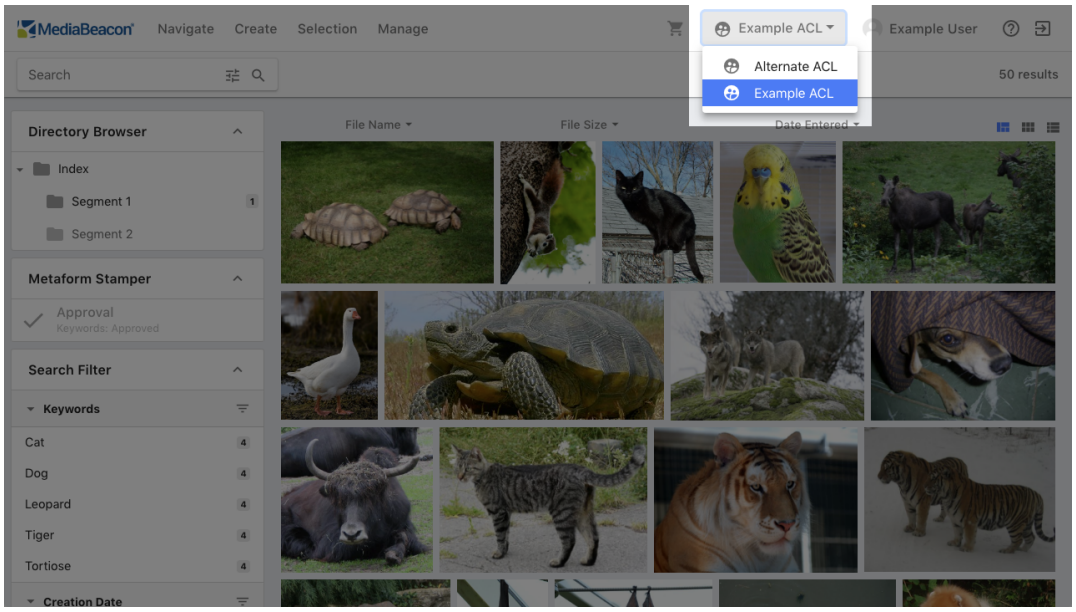
Some configurations of the Web UI will allow the user to switch between workspaces. This may be done using the Navigation menu or Workspace Tabs.





3.5.2. Switching ACLs

When the user has access to multiple ACLs, they will be able to switch between them using the ACL Menu or the ACL Component.



3.5.3. Arbitrary Navigation

When required, MediaBeacon can obscure the switching between workspaces and ACLs using the Places Browser component, which will be presented with links or buttons to change the user's access, with customized labels.

The Places Browser may be presented as a Tree, Menu, or Buttons:

Figure 3: Places Browser in Tree mode

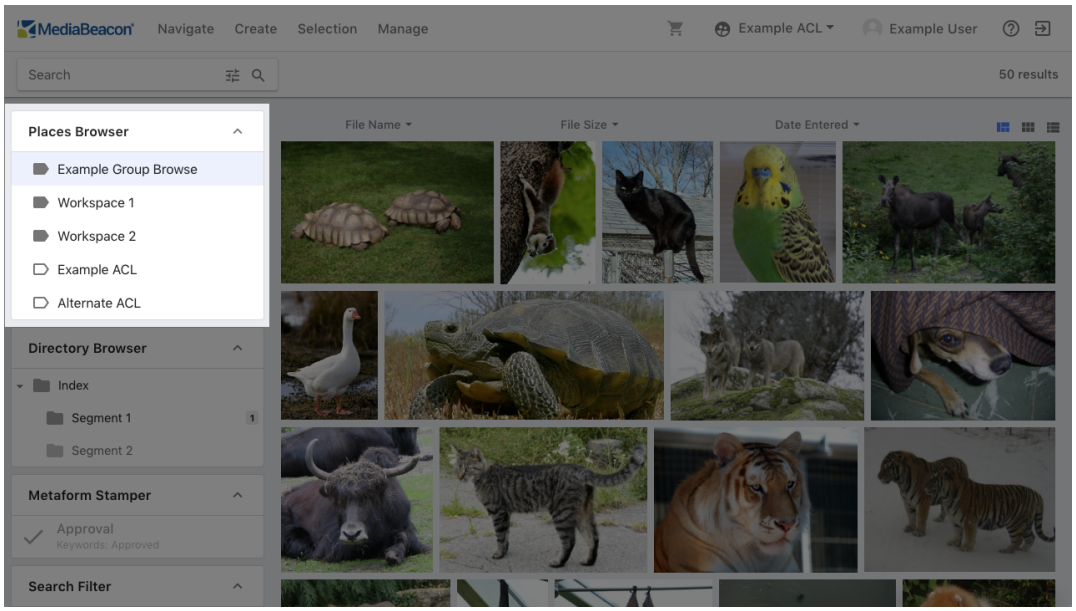


Figure 4: Places Browser in Menu mode

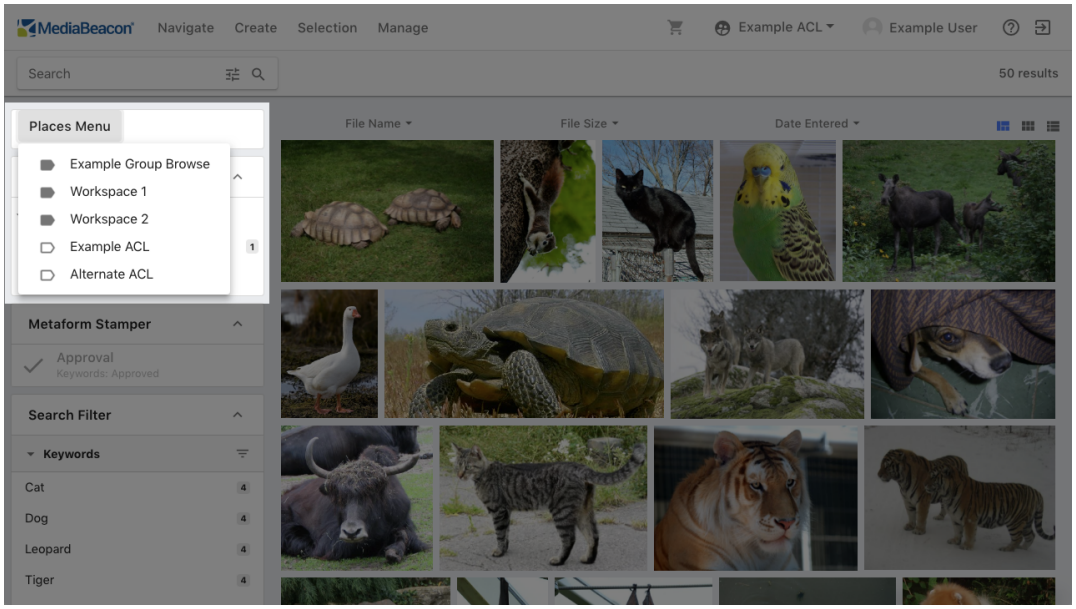
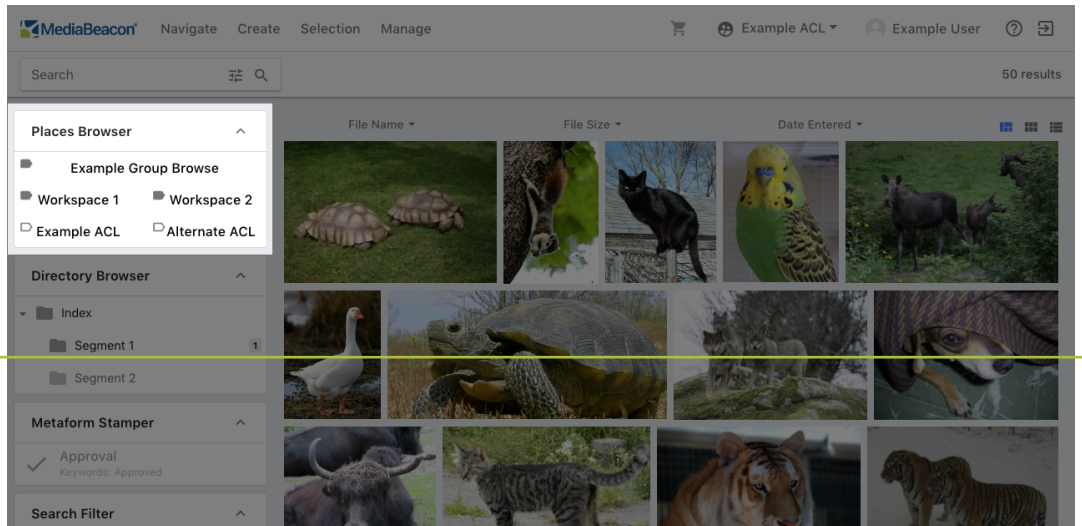


Figure 5: Places Browser in Button mode



3.6. Keyboard Shortcuts

MediaBeacon's Web UI has a number of keyboard shortcuts to aid users in performing repetitive tasks

These keyboard shortcuts are functional whenever a user is not editing field contents and not viewing a dialog box.

For browsers running in a Windows operating system, use the "Control" key in place of "#".

3.6.1. General

Display keyboard shortcuts: Shift + ?

View Component

- Clear selected assets: # + Shift + x
- Delete selected assets (with confirmation): # + Backspace
- Download selected assets (QuickDownload for a single asset): # + d
- Highlight neighbor asset: Arrow Keys
- Open/Close selected asset: Spacebar
- QuickSearch: # + Shift + f
- Select all assets: # + a
- Add selected assets to the cart: # + s
- View selected assets: # + Shift + v
- Zoom in/out of the tile component: # + Alt + Up/Down Keys

Dialog

- Show/hide Bulk Edit selection dialog: # + b
- Close Dialog: Escape
- Show/hide Copy/Move selection dialog: # + Shift + c

3.7. Search

This section will cover different search functions in MediaBeacon, and the core concepts they all share.

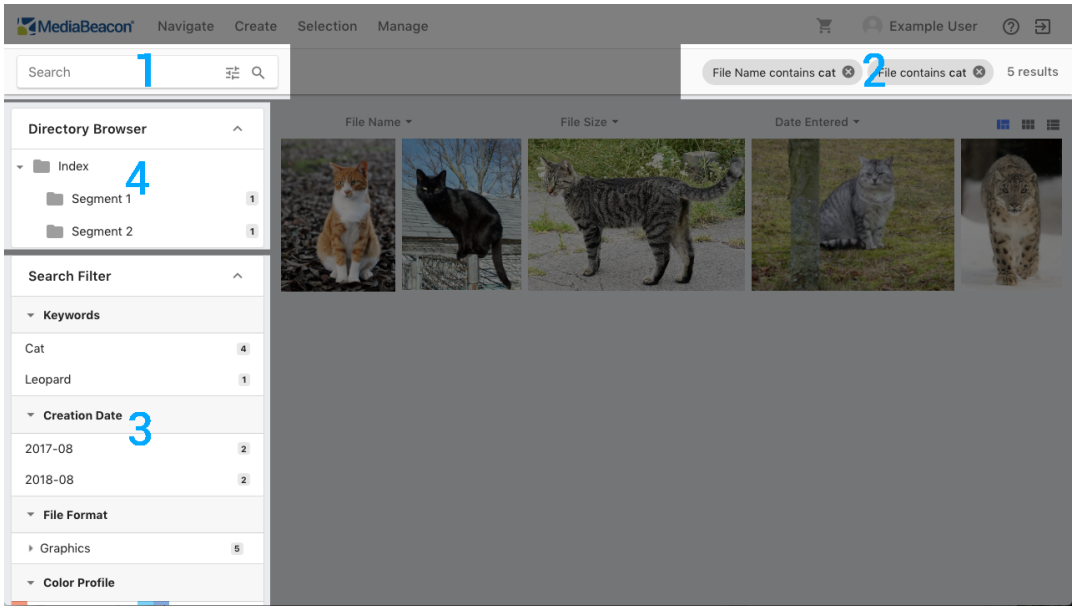
3.7.1. Search Overview

This article reviews basic search concepts

Search Components

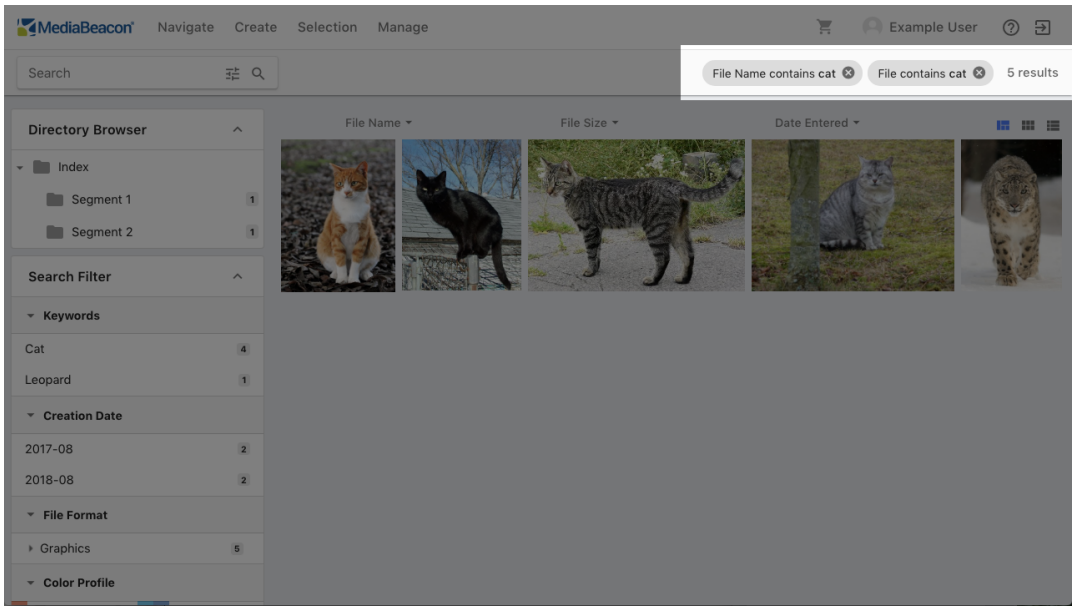
Several common components involved with searching are:

1. Quick Search
2. Search Status
3. Search Filter
4. Directory Browser



Search Criteria

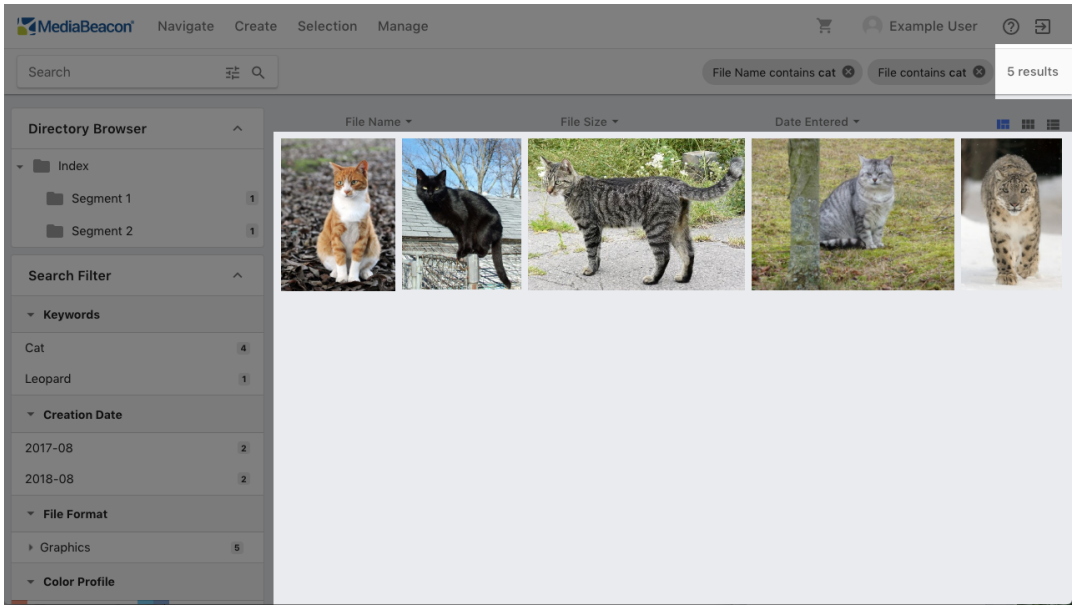
MediaBeacon provides an array of ways to search for assets. Using any of them, such as Quick Search, **search criteria** are added to the Search Status component



Search criteria collectively filter which assets are displayed to the user, referred to as the **current view**.

Current View

The current view is the set of all assets that match the current search criteria. This is also the set of assets will be selected when the user chooses the "Select All" command. The count of assets in the current view is visible to the right of the search criteria.



The current view of assets is restricted to those which match the search criteria, and the current view count is displayed

Search Criteria Retention

Some actions clear the current search criteria, while others add to that list. Below are the default actions that clear, add to, or retain search criteria. Keep in mind that an individual MediaBeacon instance may deviate from these default behaviours depending upon configuration.

Clears search criteria:

- Clicking the Home button in the upper left of the interface
- Switching between ACLs
- Performing a Good Search

Adds to search criteria:

- Selecting a value in the Search Filter

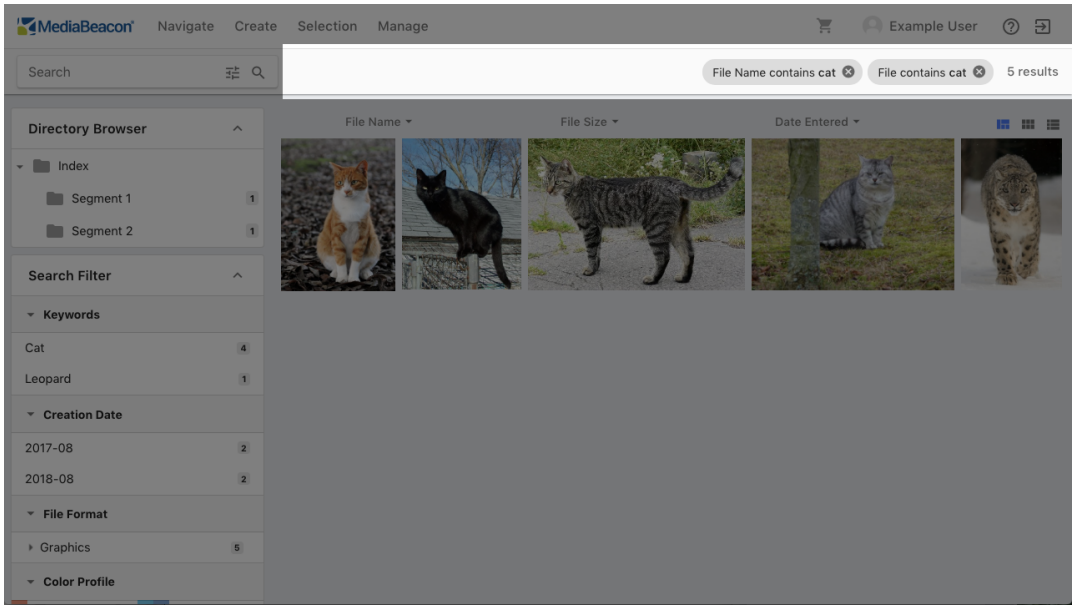
Retains Search Criteria

- Switching between workspaces

3.7.2. Search Status

The Search Status component allows the user to view and alter the currently applied search criteria.

Figure 6: The Search Status component



Working With Search Criteria

Search criteria may be added by using any of the available search methods, filtering the current view.

Individual search criteria may be removed with the clear icon on each term, or all terms may be cleared by clicking the Home button.

Figure 7: Search criteria clear buttons

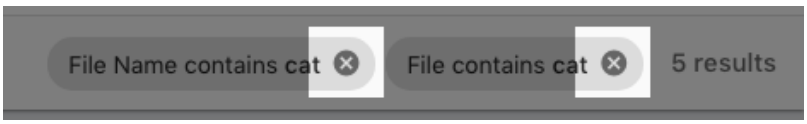
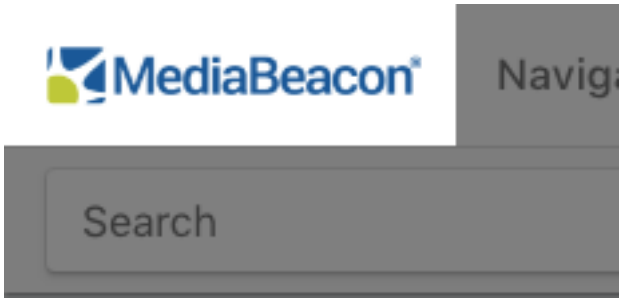


Figure 8: Home button



Types of Search Criteria

Each type of search will display slightly different criteria:

Quick Search

Search Filter

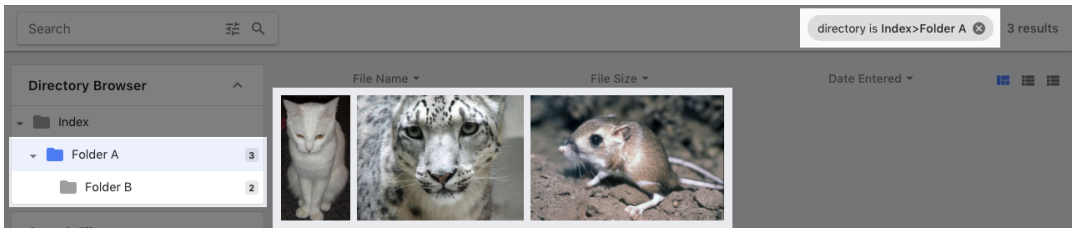
Not Search Filter

Advanced Search

Selected Directory

Folder Transparency and Opacity

When a folder is selected in the Directory Browser, MediaBeacon's default behavior is to display all assets in that folder and all subfolders in the current View component, this is referred to as folder transparency



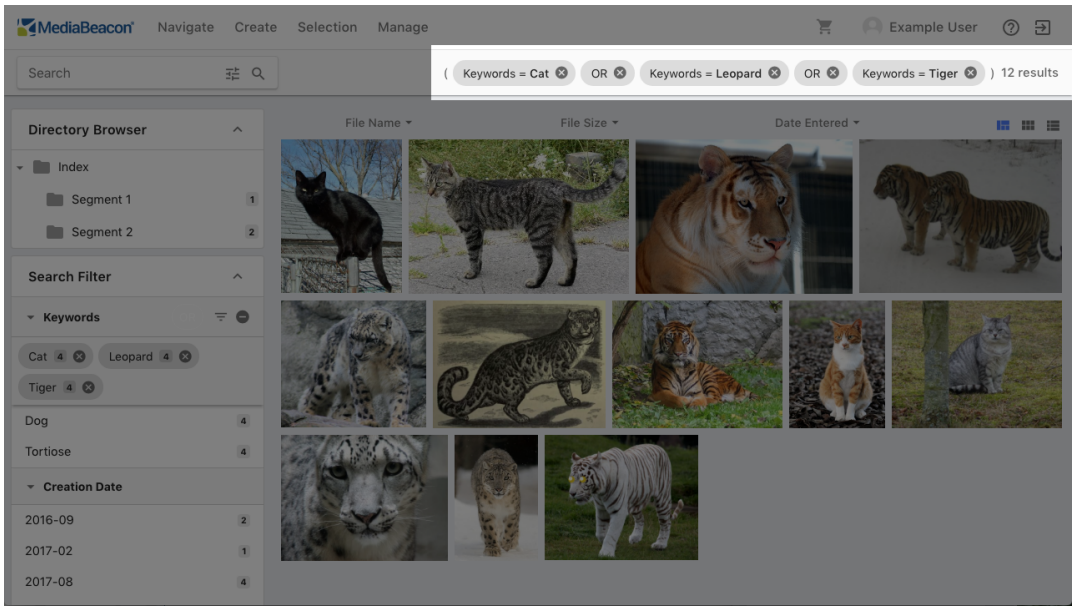
In order to filter for those assets located in the root of a folder, the user can click a "directory" search criteria (after first clicking a folder in the Directory Browser). The search criteria is then put in "folder opacity" mode, indicated by an opaque folder icon in the left-hand side of the directory search. In this mode, subfolder's contents are not displayed in the View component.

Advanced Operators

Advanced operators (AND, OR), also known as boolean operators, are used to combine search criteria in advanced types of searching. The option to view criteria with these operators is configured by an administrator.

When displayed, these operators can be clicked to toggle between "AND" and "OR".

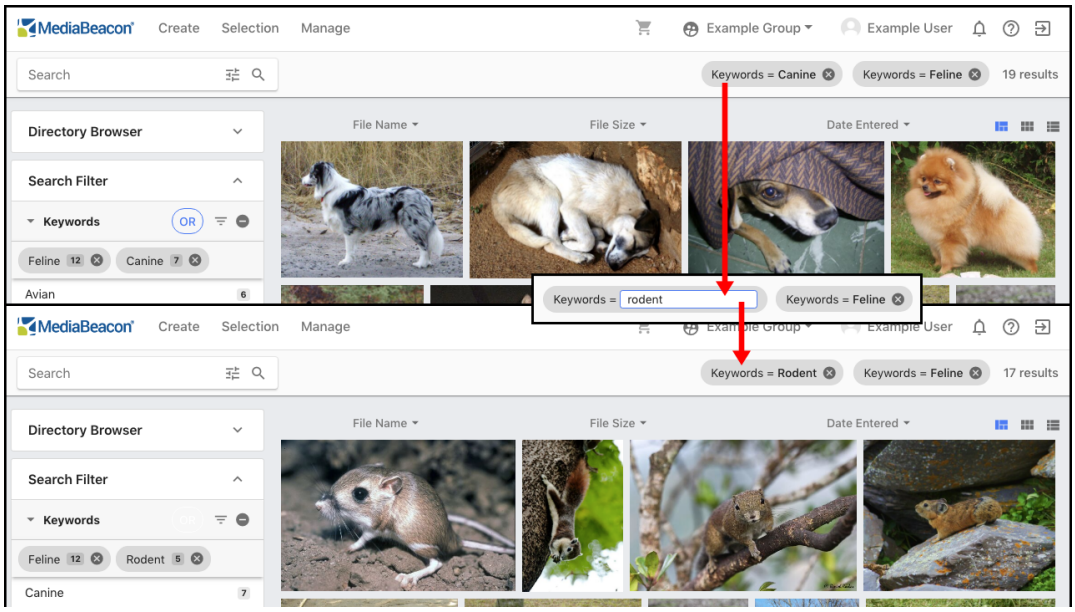
For more detail on how to use advanced operators, see the [Search Filter] section.



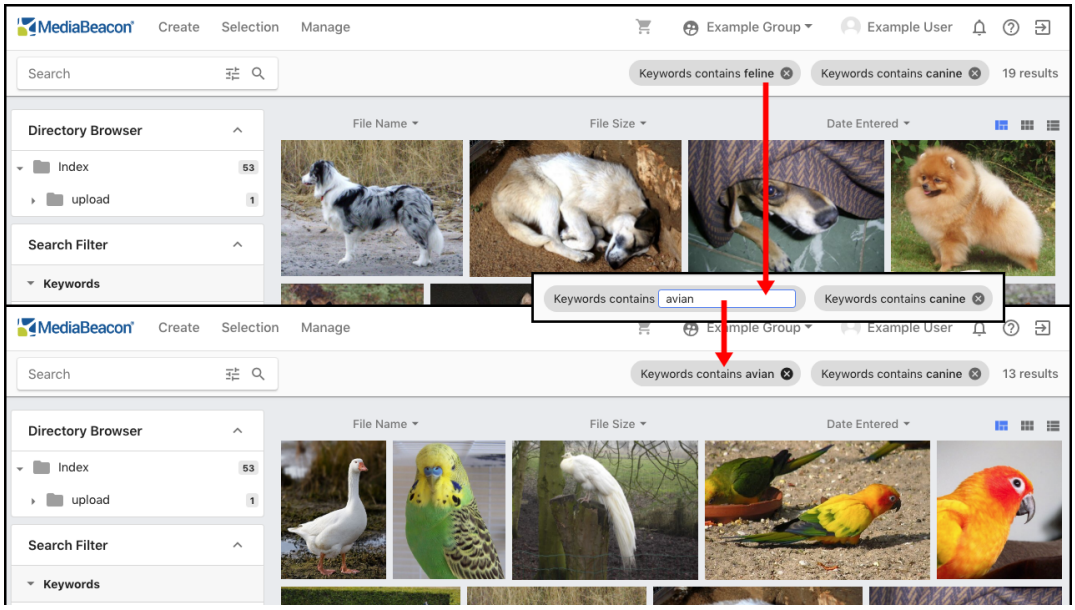
Editable Search Criteria

In MediaBeacon 2019.2 and above, the values of search criteria may now be directly edited. The user may click on a search criteria's text, and it will enter an edit mode, allowing the user to substitute a string.

- Advanced Search criteria values, before and after



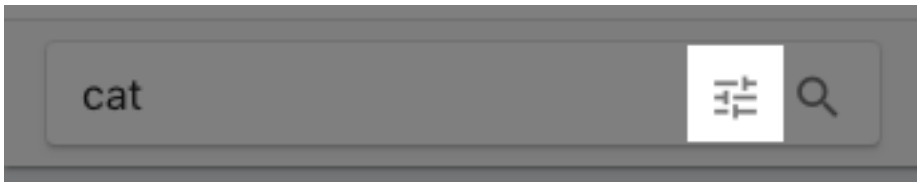
- Search Filter criteria values, before and after



3.7.3. Advanced Search

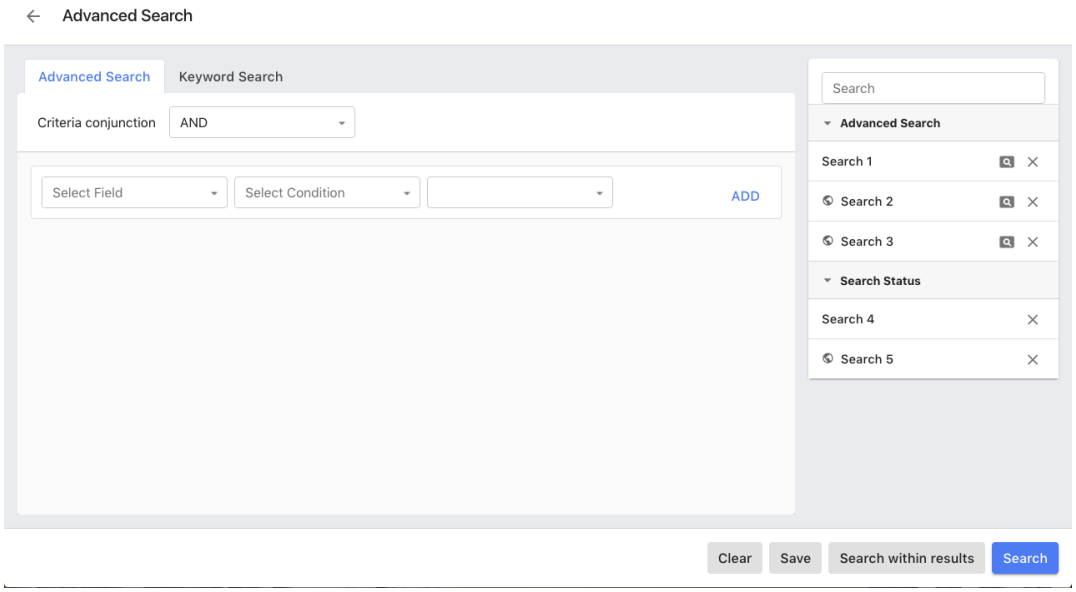
Advanced Search allows users to build complex searches using arbitrary fields.

Advanced Search is a dialog that is accessed from the Quick Search component.



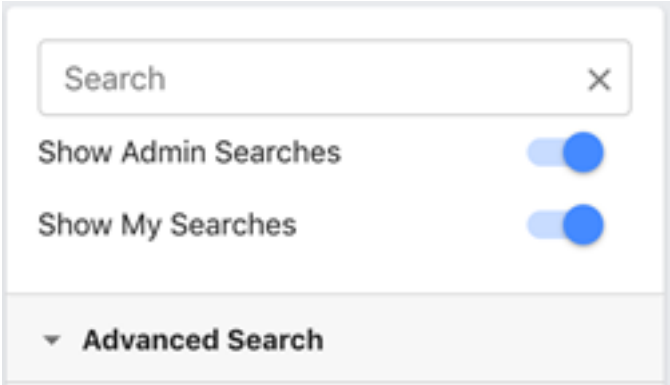
This feature may be disabled by the administrator, in which case the button will not be present.

The Advanced Search dialog encompasses the entire browser's screen, containing two tabs, Advanced Search, and Keyword Search. There is also a saved search panel to the right.



New ability has added for users to filter on saved searches that they have created in the Advanced Search.

An individual user may view searches that they have created in the Advanced Search dialog or in the Save Search component using the advanced search button inside the quick search component.



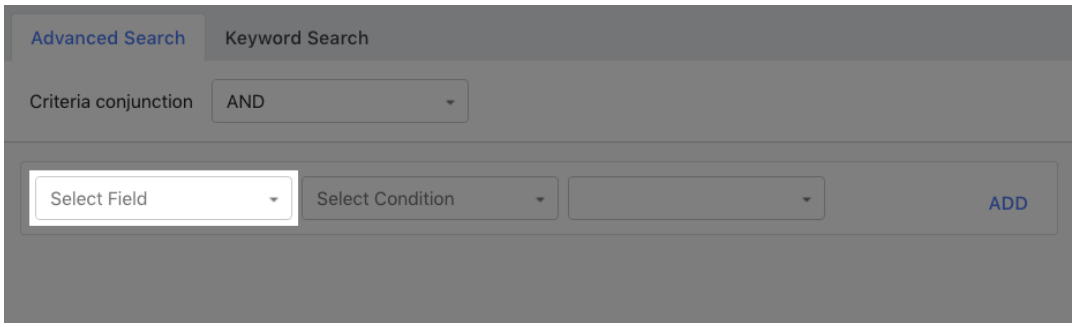
Advance Search Tab

The Advanced Search tab allows users choose one or more fields, search conditions and values for each field and then clicks "Search" to perform a search.

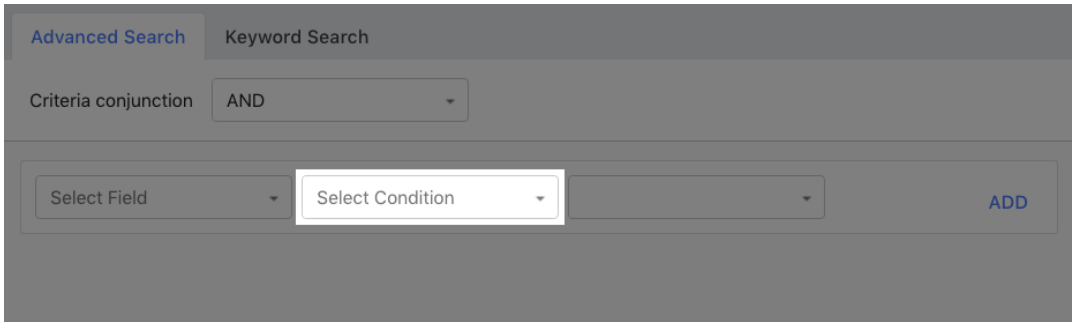
The user will need to know specifically which fields they wish to search within for this type of search, as it will only return results from the specified field(s).

Advanced searches are composed of one or more lines that contain:

- A specific field

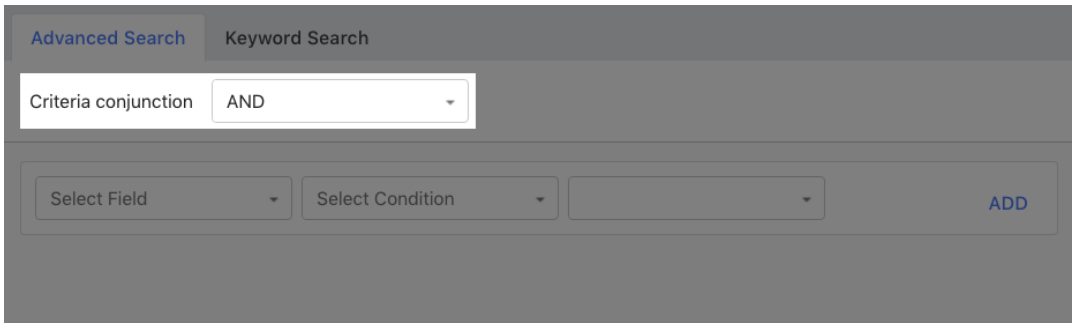


- A condition (aka search operator)

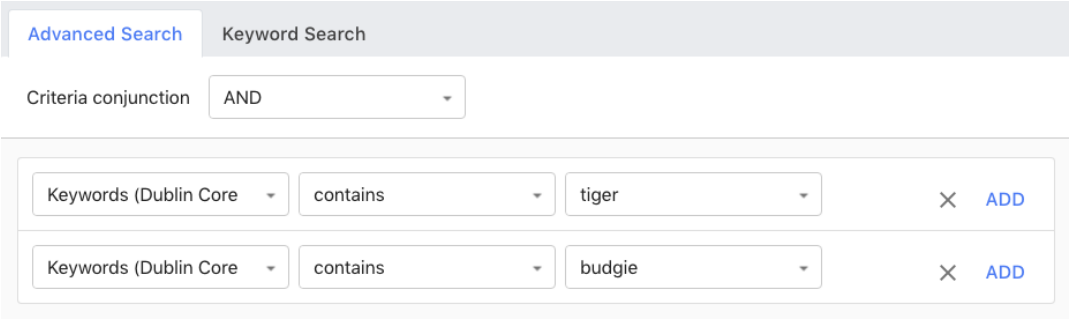


- A value

The search is also affected by the the Criteria Conjunction setting, allowing the user to choose to combine all the search rows together with the AND boolean operator or the OR operator.



Users may add additional lines by clicking the "ADD" link, remove a line by clicking the ([image]) icon , and perform the search by clicking the "Search" button at the bottom.



If users wish to add the search criteria in the Advanced Search tab to the existing search criteria (set prior to entering the Advanced Search dialog), they can click the "Search within results" button. In this way a user can create a complex search by consecutively using this function.

Field Types and Conditions

Each field type has a list of conditions that can be used in searches. These affect how the string entered in the value field will

- String, Text Area:
  - contains
  - is
  - does not contain
  - is not
  - is null
  - is not null
  - exact phrase
  - at least one word
  - all words
- Comma Separated Values:
  - contains
  - does not contain
  - is null
  - is not null
- Date:

  - is
  - is today
  - is after
  - is or is after
  - is after today
  - is at least N days after today
  - is before N days after today
  - is within N days after today
  - is before
  - is or is before
  - is before today
  - is after N days before today
  - is at least N days before today
  - is within N days before today
  - is not
  - is null
  - is not null

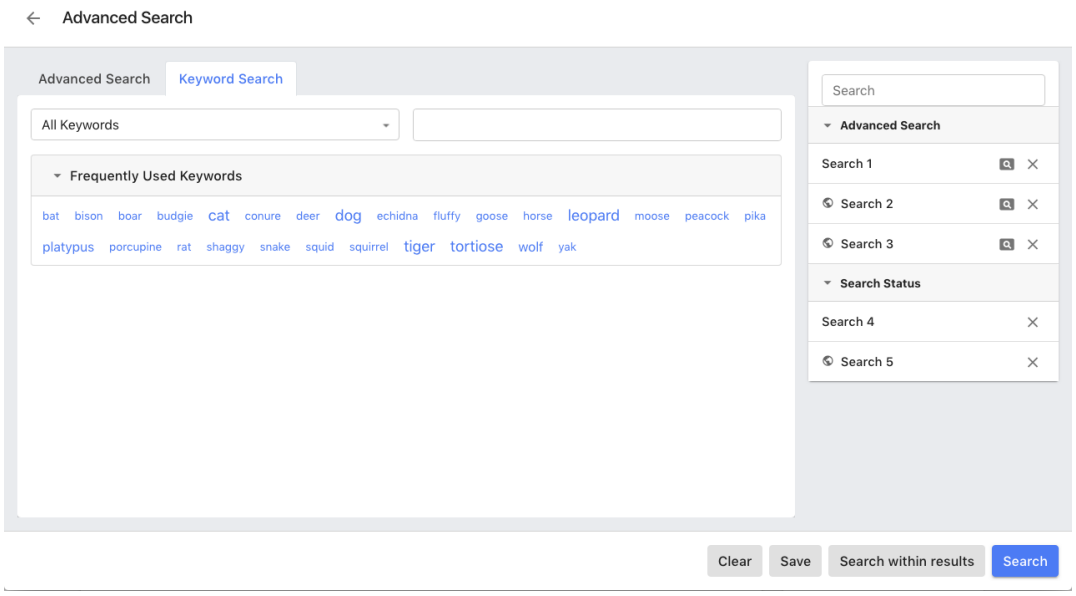
- Integer, Real Number:
  - is
  - is greater than
  - is greater than or equal to
  - is less than
  - is less than or equal to
  - is not
  - is null
  - is not null

Search Within Results

The "Search within results" button will add its criteria to the current search criteria (with an AND operator), instead of replacing the criteria.

Keyword Search Tab

This tab is used to search the Dublin Core "Keywords" field, and displays a tag cloud of keywords in the system. The user may enter a string, or click a keyword to add that individual value to the search field.

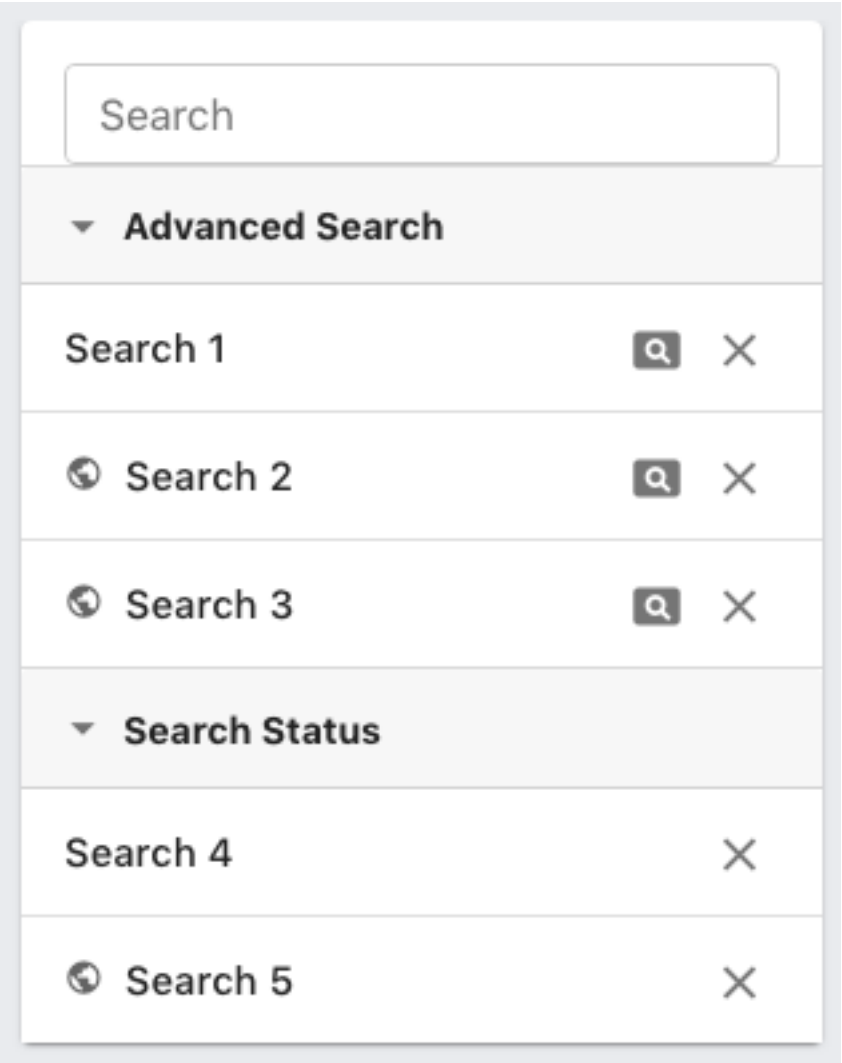


Entering text to search in this field is slightly different than Quick Search; entering a comma (,) will separate the string into two separate values.

This search has a special mode selector, allowing the choice of either "All Keywords" or "Any Keywords". Given a search of (scenic)(sky), "All keywords" will return only those assets that have both scenic and sky in the Keywords field, and "Any Keywords" will return assets that have either scenic or sky.

This search can also be used with the "Search within results" feature.

Saved Search Panel



Using Saved Searches

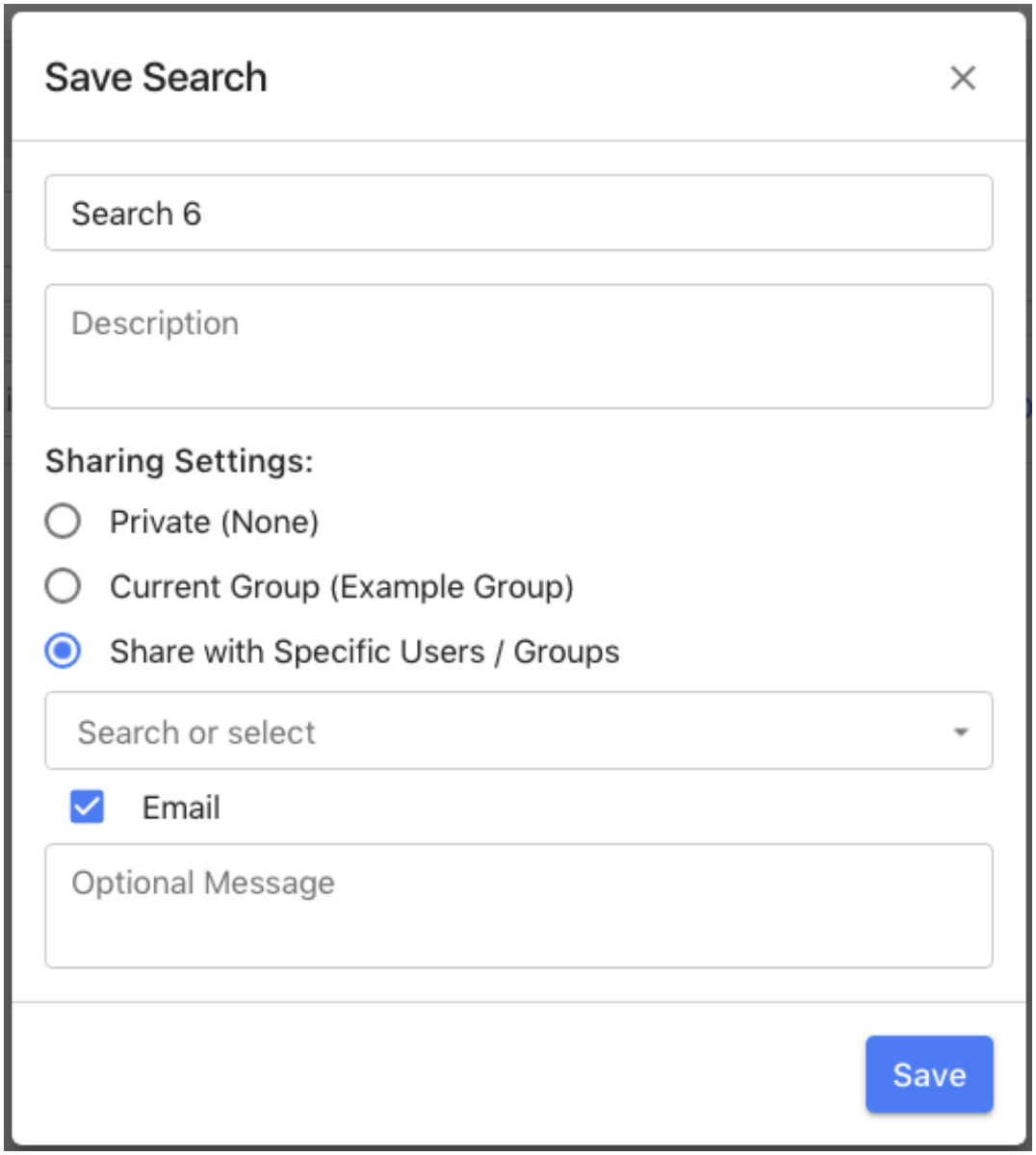
This panel shows saved searches. The elements of this panel are:

- A search/filter field, allowing users to filter the displayed saved searches
- Advanced Search: These are saved advanced searches.
  - Clicking the name of the search will immediately close the Advanced search dialog and perform the saved search.
  - Clicking the magnifying glass icon will load the saved search parameters into the dialog so they may be inspected or altered.
  - Clicking the "X" button will delete the saved search. Saved searches made by another user may not show this icon.
  - Search Status: These are searches saved with the Search Status component as mentioned above. One important difference from Advanced saved searches is that Search Status saved searches record all criteria in Search Status, and they automatically reload selected values in the Search Filter.

Making Saved Searches

- Advanced Search: Once a set of parameters have been entered, the user may click the "Save" button to save the search. The Save Search dialog is then displayed, see below.
- Search Status: This is an optional configuration that is enabled by an administrator. See *Search Status* on page 34 for more information.

Save Search Dialog

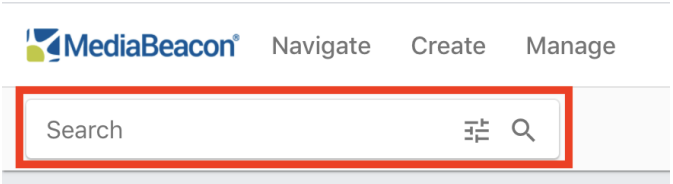


This dialog is shown whenever a search is saved.

- Name: required, the name of the search
- Description: optional, text description for the search

- Sharing Settings:
  - Private: the saved search will only be visible the current user.
  - Current Group: the saved search will only be visible the users of the current group.
  - Share with specific Users / Groups: the user may designate users or groups with whom to share the saved search. The "Search or select" field lists users and groups (groups have an icon to the left to differentiate them)
    - Mail: optionally, the user may send an email to the users and groups chosen, and an optional message field to include a message in that email.

3.7.4. Quick Search



Quick Search helps the users to guide through the assets using a string. MediaBeacon searches through assets which contain this string in its Metadata. A user can enter the search term in the field and presses the return key or clicks the magnifying glass icon to immediate right of the field to perform quick search.

The user can type the word partially or completely and MediaBeacon shows type-heads from which the user can choose the requires search que.

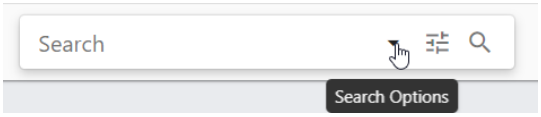
Search Component Controls

Initially when the user is in the workspace, the above search component is shown with advanced search option and the magnifying glass. Link to Advanced Search. While you place the cursor over the tab, you can find an option with other Search options.

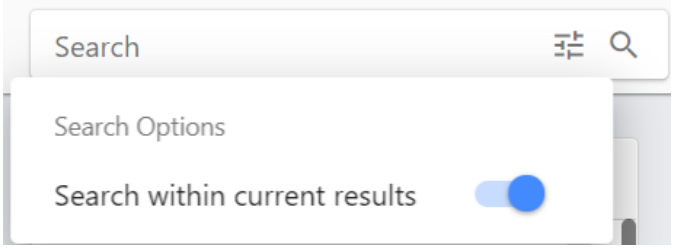
Currently, the search option contains the option to search the cue within the current results and other options configured. This option will add its criteria to the current search criteria (with an AND operator), instead of replacing the criteria.

To enable Search with Current Results

1. Put your cursor over the tab and click on Search options.



2. Select the toggle bar.



Note: The search options are configured by the administrators.

You can initiate the search by pressing enter or by using the search button. The results will be displayed on the search bar.

Whole Terms

Quick Search will use the entered string, and search based on the **whole words** contained within it. For example, the entry Fall Campaign contains two whole words, Fall and Campaign.

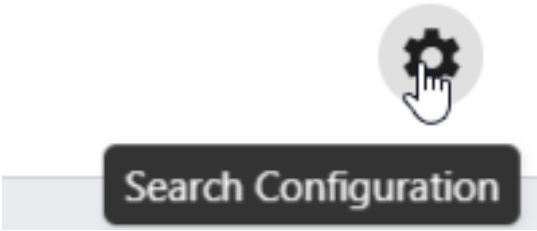
Search String Entered into QuickSearch	Results
Campaign	Searches for assets that contain a whole word in any field. Assets Returned: Fall Campaign, Campaign Fall, Campaign, Campaign 2020 Fall or Spring Campaign in any field.
Fall Campaign	Searches for assets that contain both whole words in any order in any fields. Assets Returned: Fall Campaign or Campaign Fall in one field or assets with Fall and Campaign in different fields.
"Fall Campaign"	Searches for assets that contain both whole words, in any order, on the same field. Assets Returned: Fall Campaign, Campaign Fall, Campaign 2020 Fall, all in the same field

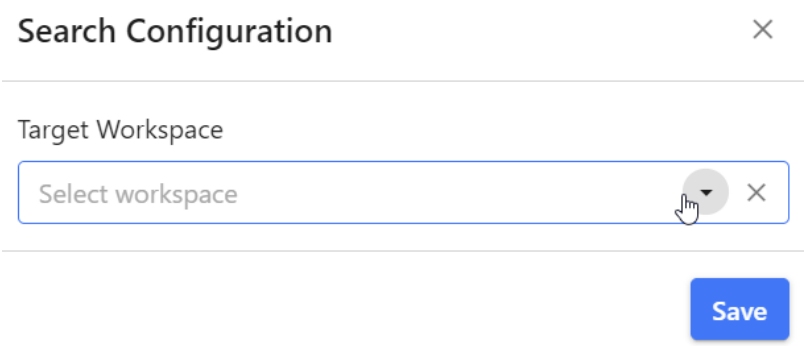
Boolean Operators

Boolean operators (AND, OR, NOT) are not parsed as operators by Quick Search, so entering apples NOT pears will search for the whole words apples, not, and pears. To search using AND, OR and NOT, use the Search Filter.

Advanced Search Button

MediaBeacon allows the user to configure Advanced Search option. By clicking the Search Configuration button, the user gets a Configuration page where they can select the target workspace where the Search needs to be performed.





Click save to make the changes.

Optional Configuration

Search Within Current Results

Normally, each search with Quick Search removes the previous search criteria. The Quick Search component may be configured to **search within current results**, so that each Quick Search is combined with the previous criteria using the AND operator.

Substring Searching

In contrast to whole words, substring searching can find a string of characters within whole words. For example, a substring-enabled search for berg would return assets containing the whole word aubergine.

Substring search is not enabled for all metadata fields by default, an administrator enables this on a field by field basis. However, substring search is enabled for filenames by default.

3.7.5. Search Filter

Users can quickly filter assets based on specific values in specific fields by using the Search Filter.

The Search Filter displays a list of metadata fields, and in turn, values and a count of assets within the current view that contain that value.

Figure 9: Metadata fields in the Search Filter

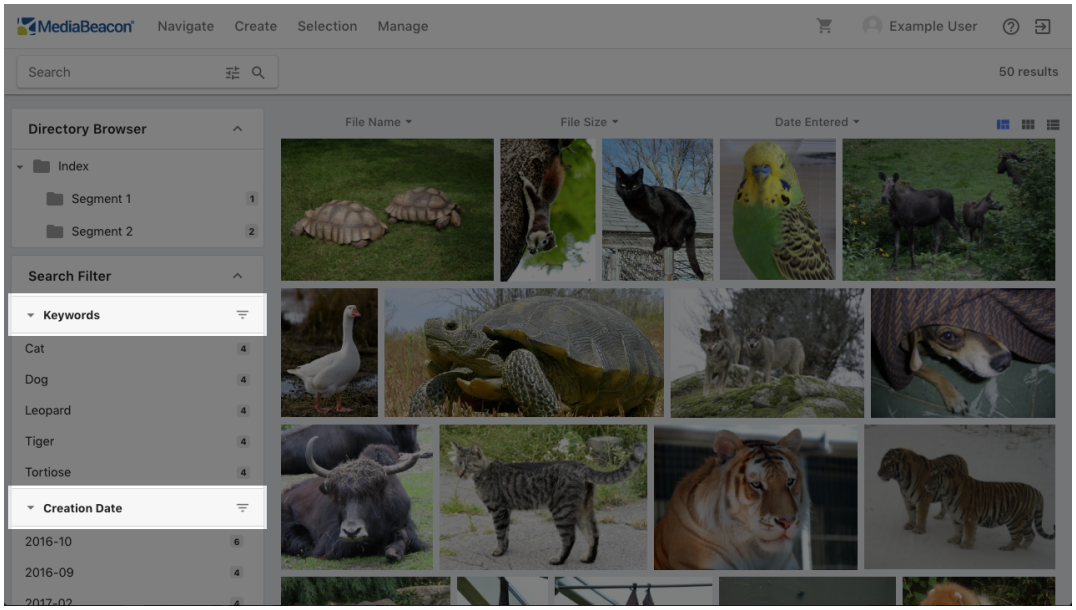
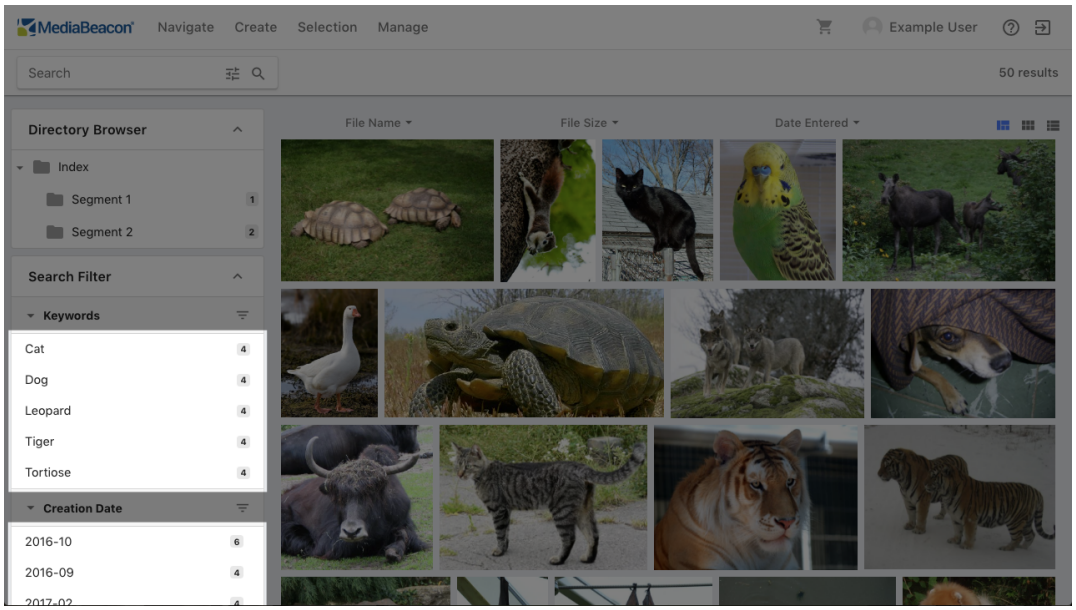


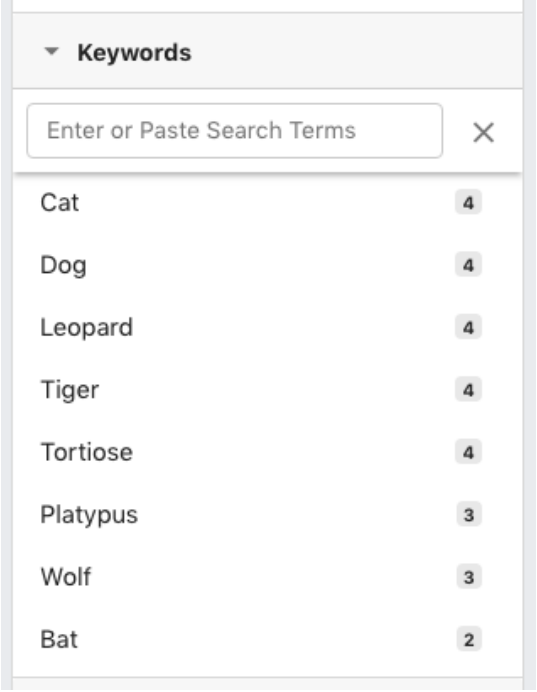
Figure 10: Metadata values in the Search Filter

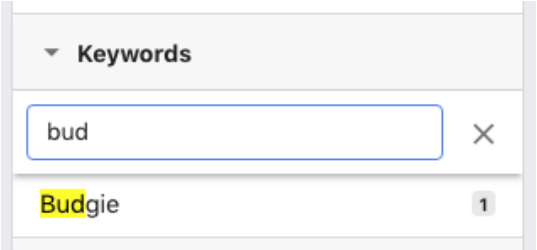


For example, under the "Keyword" heading, there might be five different values. In this case, the values would be five different keywords, and the numbers to the right are the total number of assets that contain this keyword within the set of assets in the current view.

The component's interface is divided into vertical sections, a **field name** (sometimes referred to as a facet) and a list of **values** below it. The values displayed under a field name may be toggled open and closed using the spindown triangle icon [image:button-spindown-triangle.png] to the left of the field name. If more values are present than are currently displayed (often limited for reasons of height), the filter button [image: button-searchfilter-filter.png] is displayed.

Clicking the more button will display a filter field under the field name, and show up to 256 values in a scrollable display under the field name. The filter field will filter values shown in the scroll area, allowing users to quickly find any value in the list.

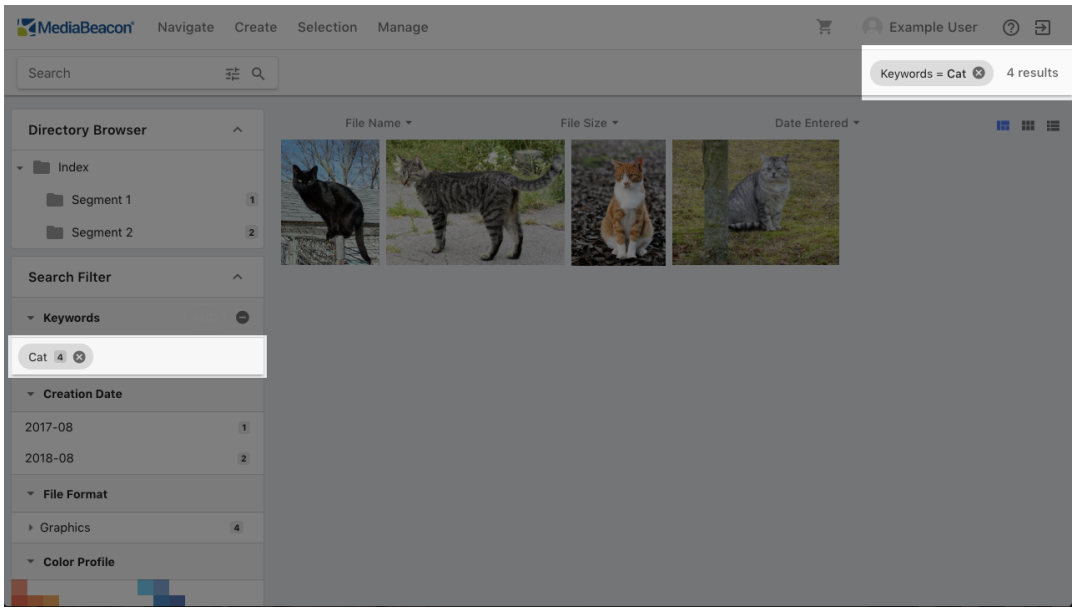




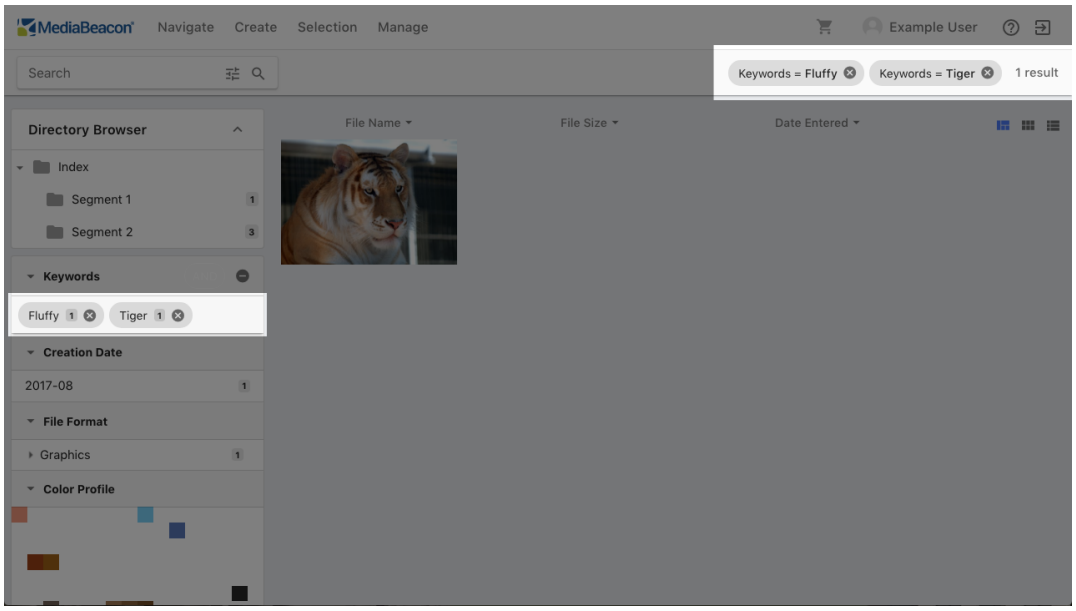
Adding and Removing Search Criteria

When the user clicks on a value, it is displayed as highlighted under the field heading. It is also added to the current search criteria, further filtering the assets in the current view to only display assets which contain the selected values.

Selected values will also change the displayed values in the Search Filter, displaying only those terms that are present in assets the current view contains.

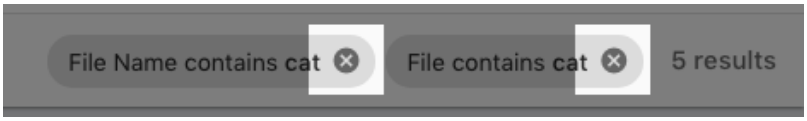


The user can add more search criteria by clicking other values.



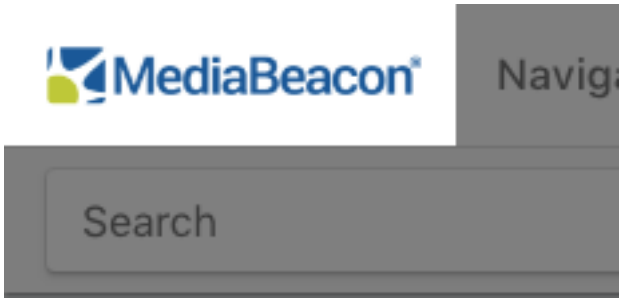
The user can remove values by:

- Clicking the Clear value icon to the right of a value to remove a specific value



- Clicking the clear all field values icon to the right of the field heading to clear all values from that field

- Clicking the Home button to clear all criteria

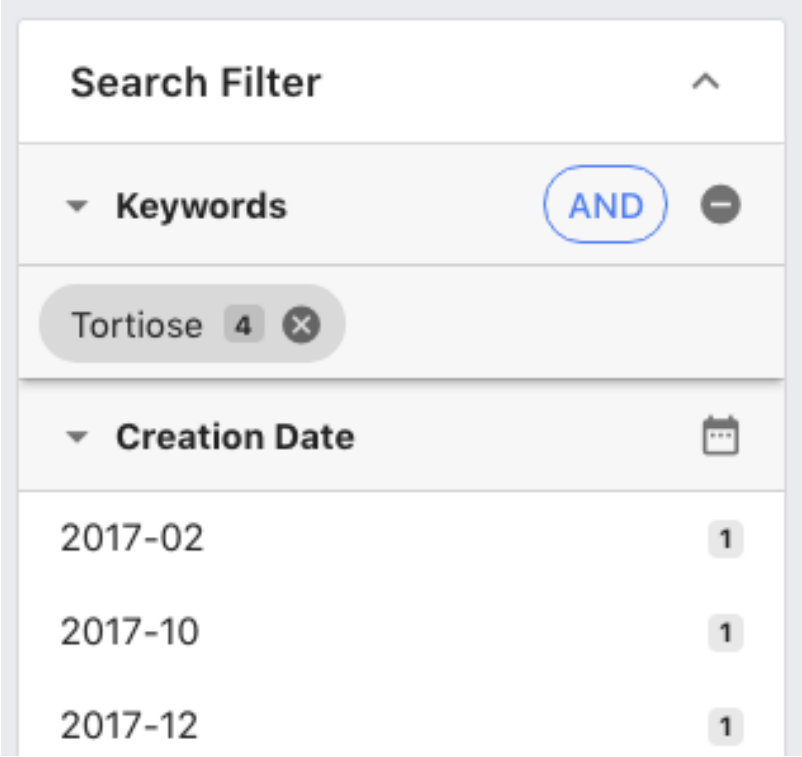


Using Advanced Operators

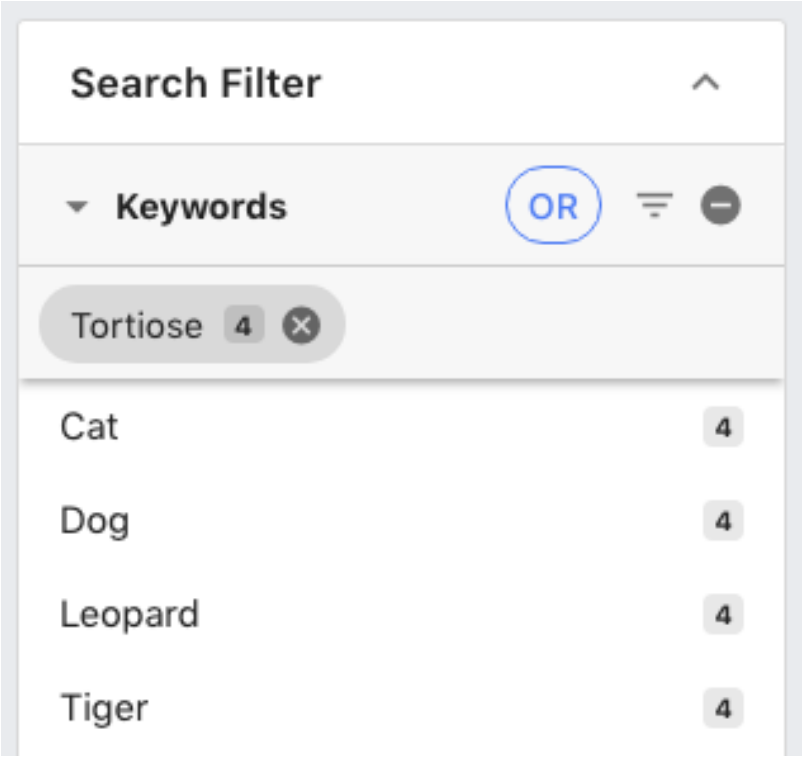
The Search Filter uses boolean search operators (AND, OR, NOT) to build complex searches quickly. For example, the search below can be built in 5 clicks:

[image of a complex search like (Fruit Type = apples OR Fruit Type = blueberries) AND (NOT Food Type = pie AND NOT Food Type = cobbler)]

When any value is chosen, an **operator indicator** is displayed, initially reading AND. This indicates which operator will be applied when subsequent values are chosen.



When clicked, this will change to OR. Note that more values are available as the currently-selected value is non-exclusive.



AND Operator

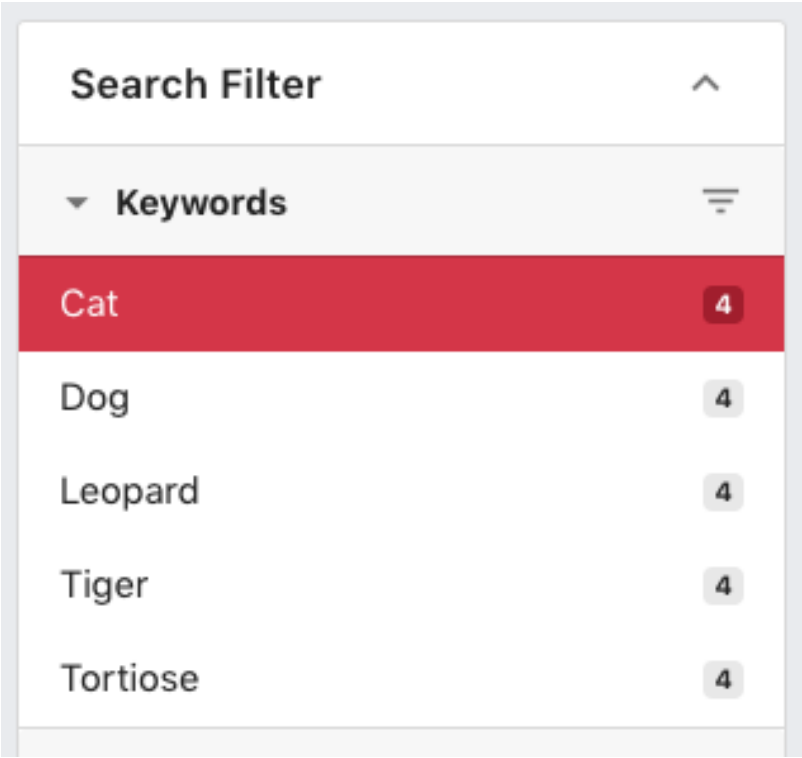
- Multiple values chosen in a given field are automatically combined with AND.
- Values chosen between different fields are always combined with AND.

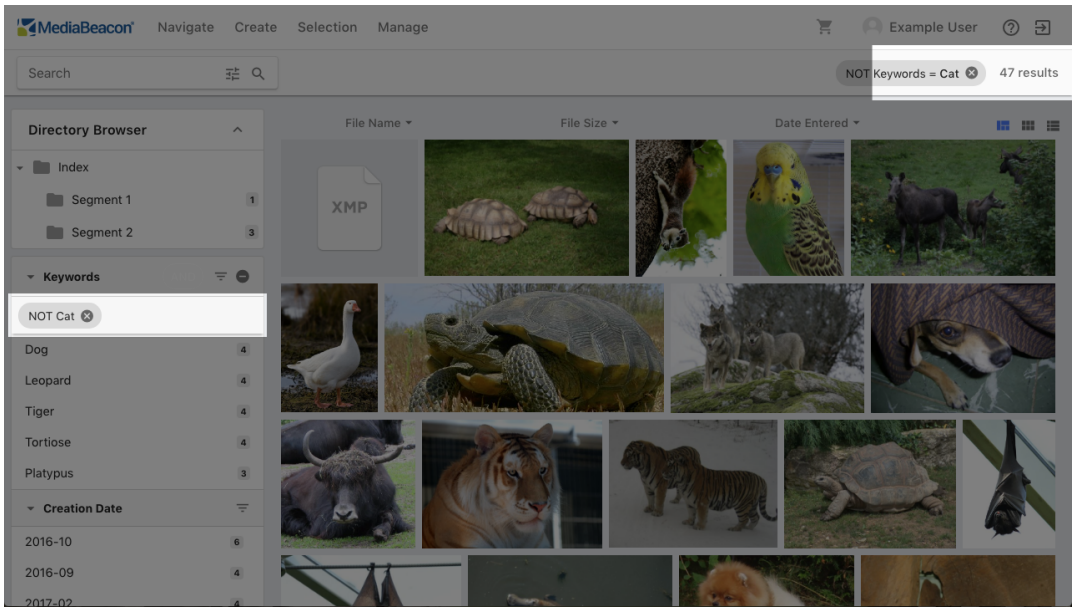
OR Operator

- Multiple values in a given field may be combined with an OR operator. Selecting the OR operator will return results that contain one or both of the search terms surrounding it.

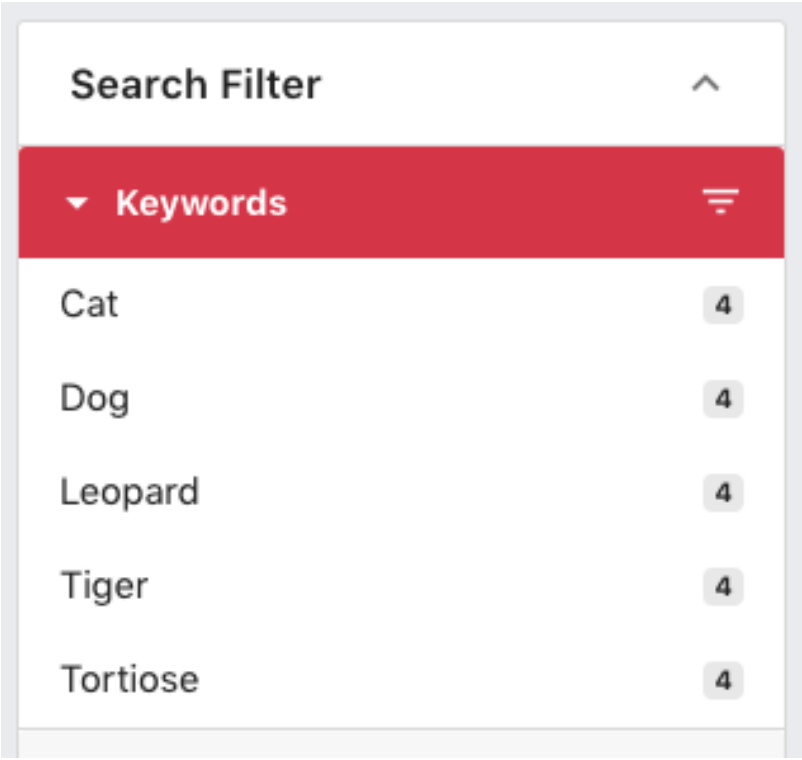
NOT Operator

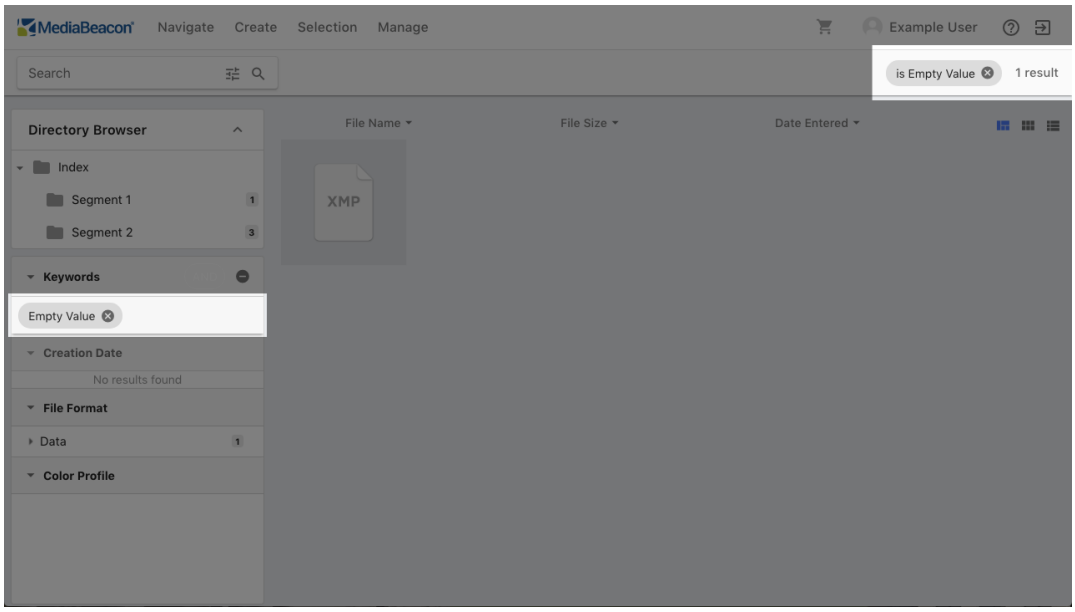
- Shift-clicking any value will add it as a **negative search criteria**, which will return assets that do not contain that term.





- Shift-clicking the field name will add a **null value search criteria**, returning assets that contain no metadata in the chosen field



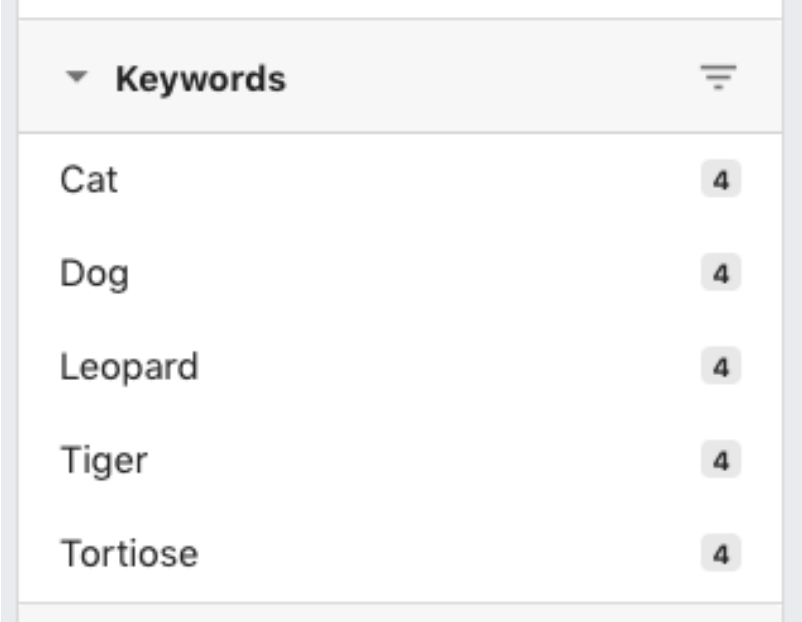


Field Types

Fields that contain specific types of metadata have different options for display.

Single Value and Multi-Value Field Types

Values in these fields types are displayed as pairs of values and counts.

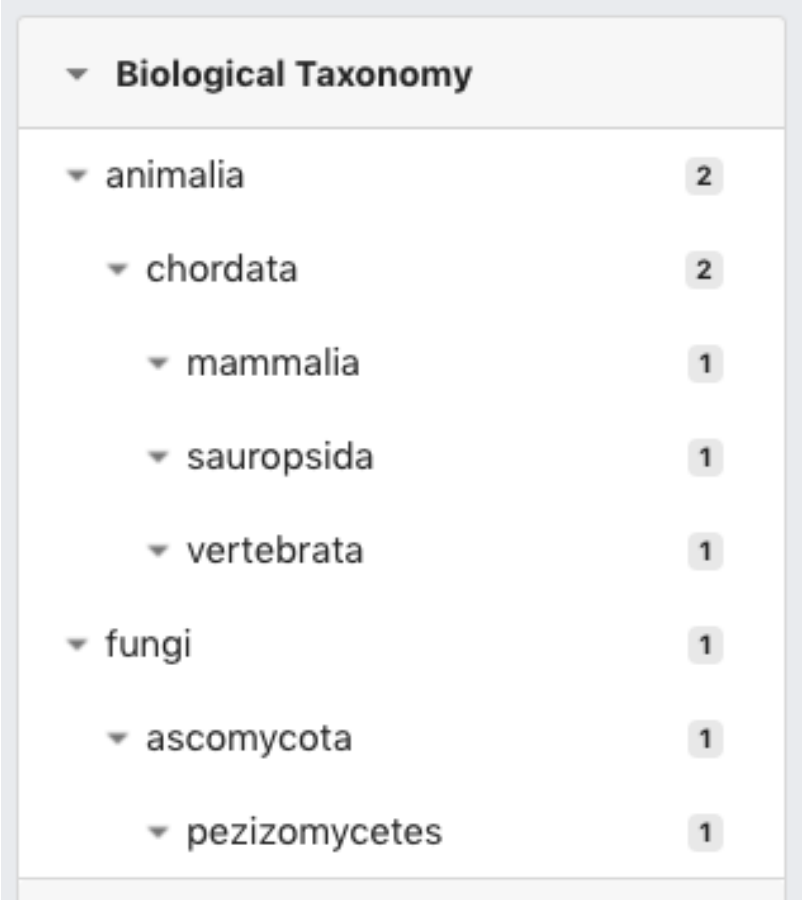


Hierarchical Fields

This type of field holds data that looks like this:

- Animalia:Chordata:Mammalia:Carnivora:Felidae:Felinae:Felis:silvestris:catus
- Animalia:Chordata:Mammalia:Carnivora:Canidae:Canis:lupus:familiaris
- Animalia:Chordata:Vertebrata:Mammalia:Afrotheria:Proboscidea:Elephantidae

In a spindown form that looks like this:

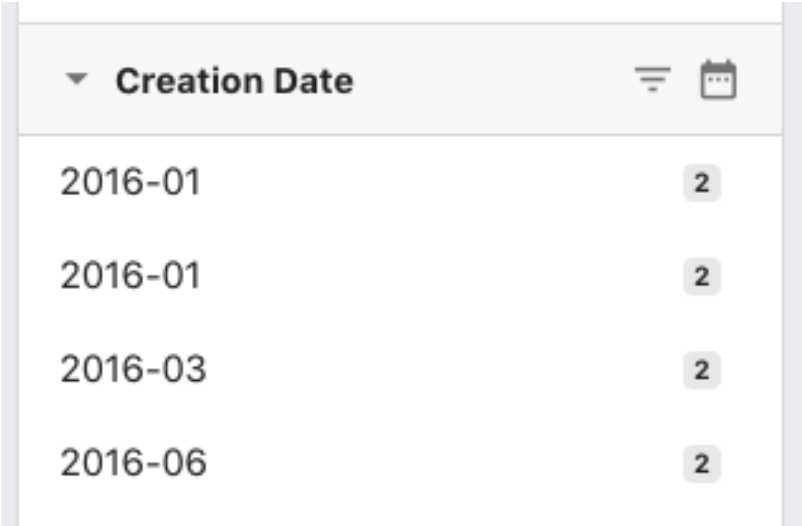


Selecting any of the interstitial values will filter any assets tagged with that value or any of the ones that contain it.

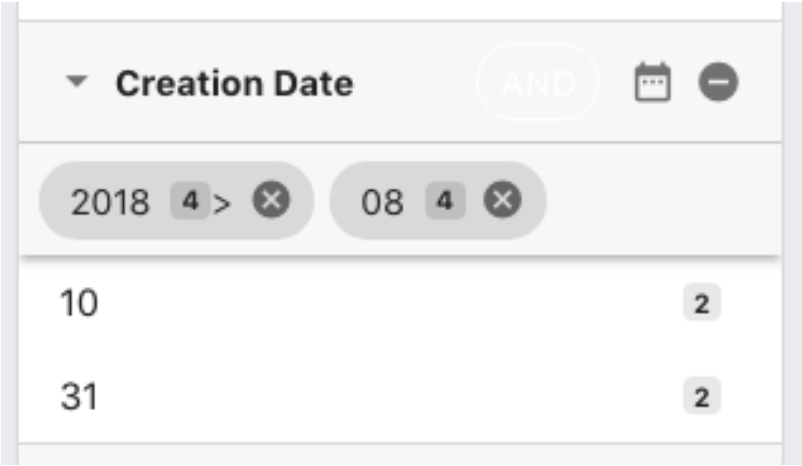
Date Fields

These fields have a variety of display options:

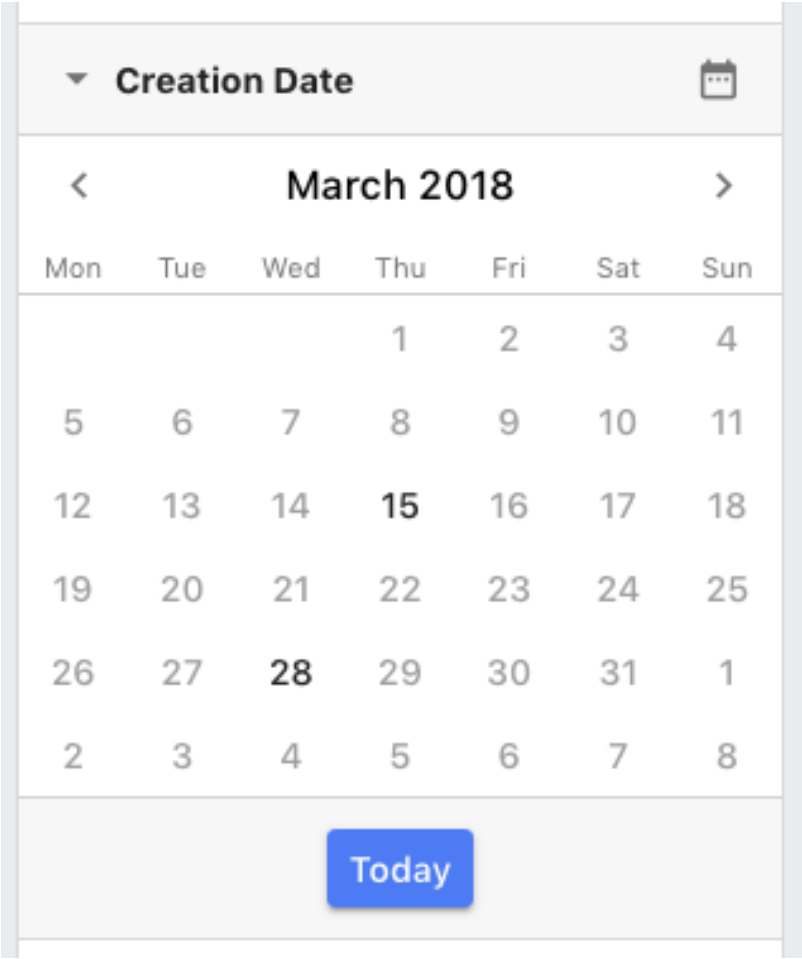
- Each value may represent a whole month or range of months, filtering for that range of dates.



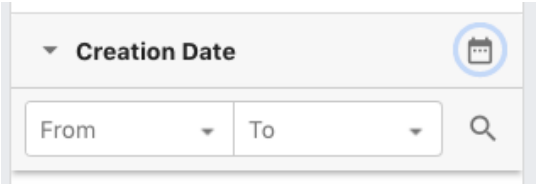
- Values may be displayed as a hierarchy, with days and months nested within years.



- A graphical calendar can be used, with optional color coded days for number of assets present.

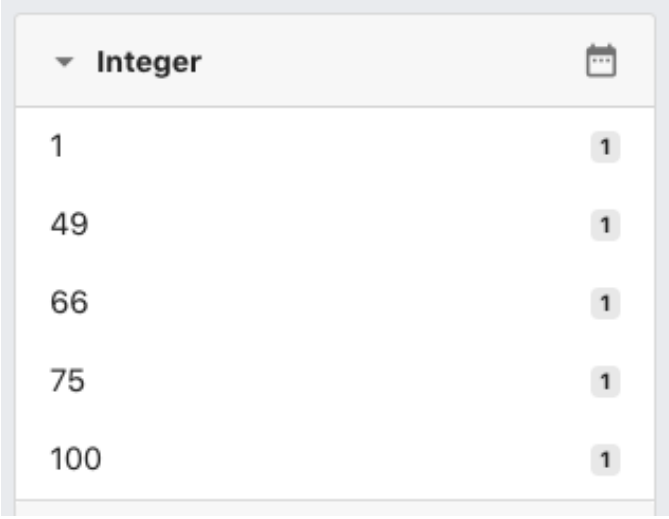


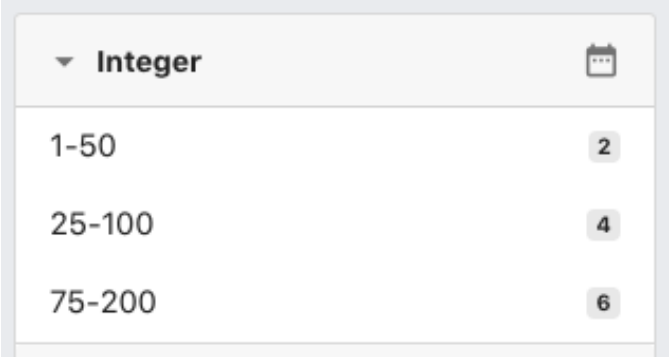
- Date fields may also be filtered by date range, by clicking the ranger filter button.

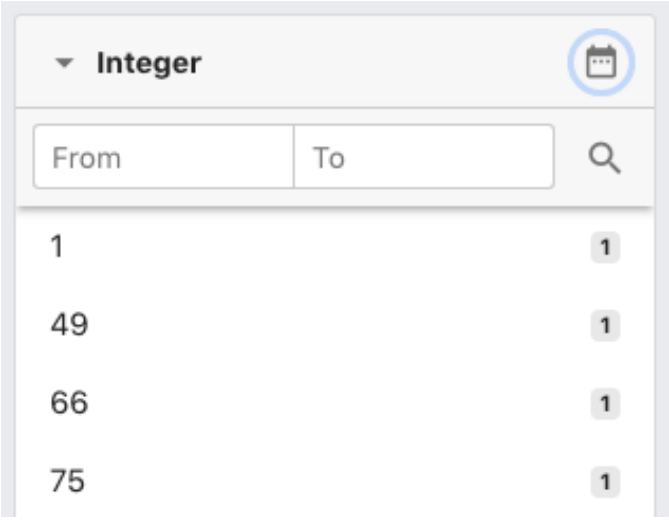


Integers

This field type can display exact values, or preset ranges of values. Also available is a range filer, similar to the date field type.

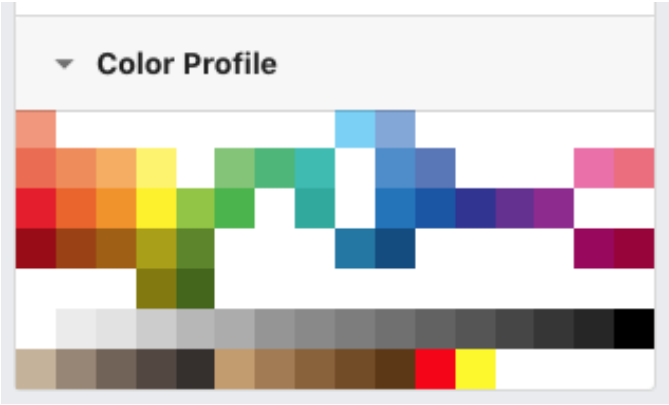

Integer
1
1
49
1
66
1
75
1
100
1


Integer
1-50
2
25-100
4
75-200
6

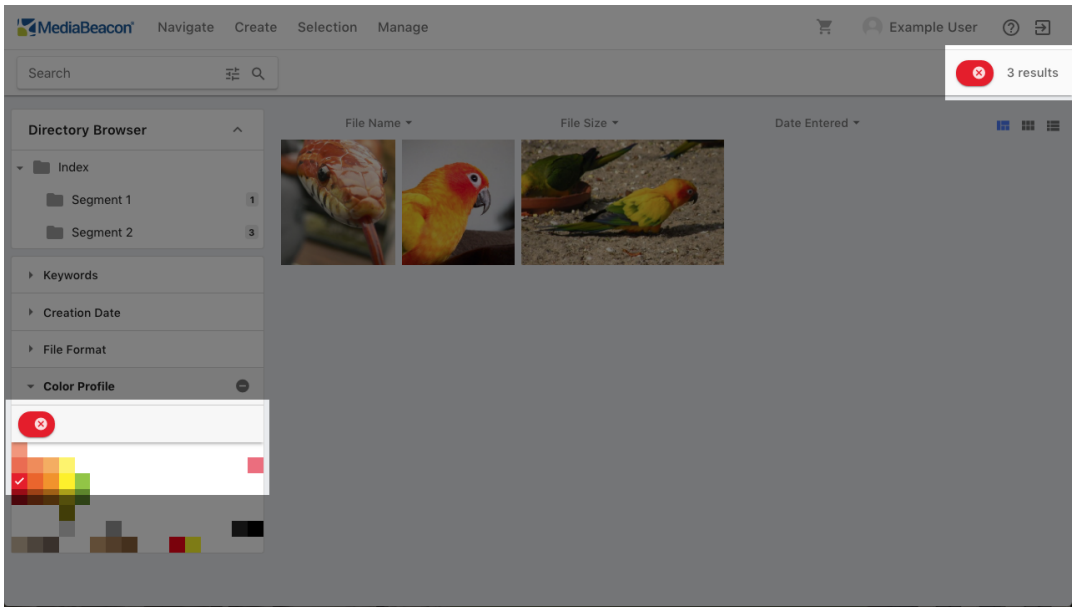

Integer
From
To
1
1
49
1
66
1
75
1

Color Profile

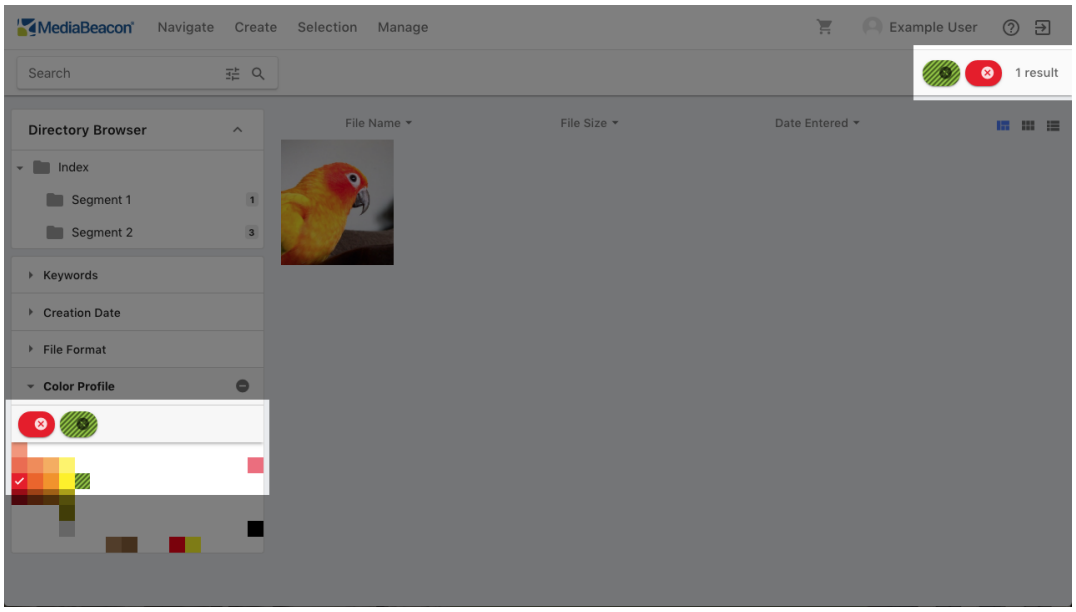
The Color Profile displays a set of histogram colors. Every asset with a visual preview is tagged with some of these of these colors at the time of upload, representing the most prominent colors in the image. These colors are not exact matches, but rather used to broadly color-categorize images.



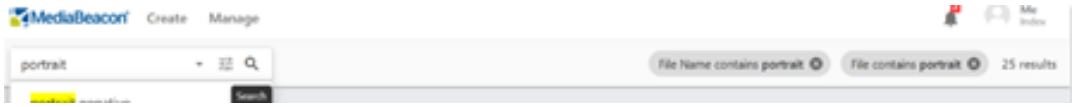
Selecting a color will filter for assets containing these broad color categories.



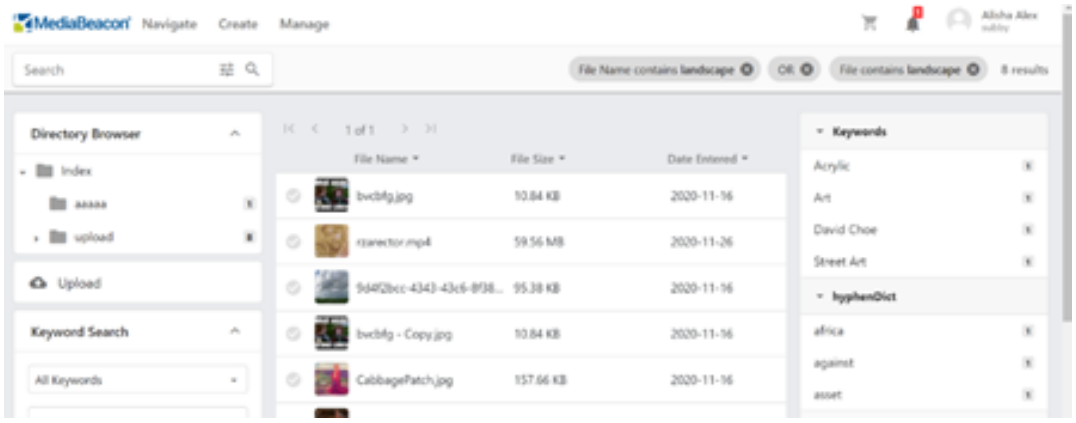
Colors may also be shift-clicked to exclude certain colors.



3.7.6. Image Search



Images can be searched based on its image orientation, (width and height). An image is landscape if the width is more than height, and it is portrait if height is greater than width.



3.8. Browse and View Assets

This section reviews MediaBeacon's options for displaying assets.

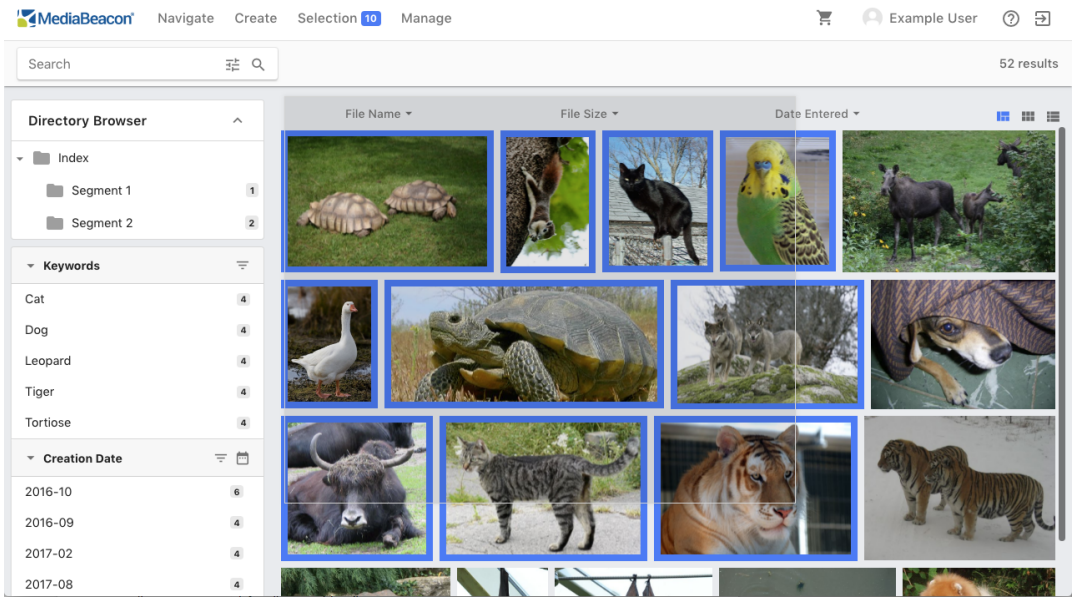
3.8.1. Asset Selection

Assets in MediaBeacon may be selected, similar to icons in a desktop operating system.

Selecting Assets

A new UI concept for asset selection has been implemented.#Assets now have a selection icon that must be clicked to add or remove an asset from the current selection#(Selection Mode). Band#selection#still operates#as before

Figure 11: Band Selection



Asset Selection Icons:

Figure 12: Infinite Scroll View

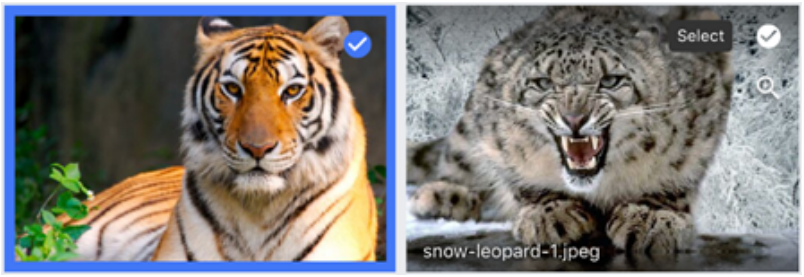


Figure 13: Tile View

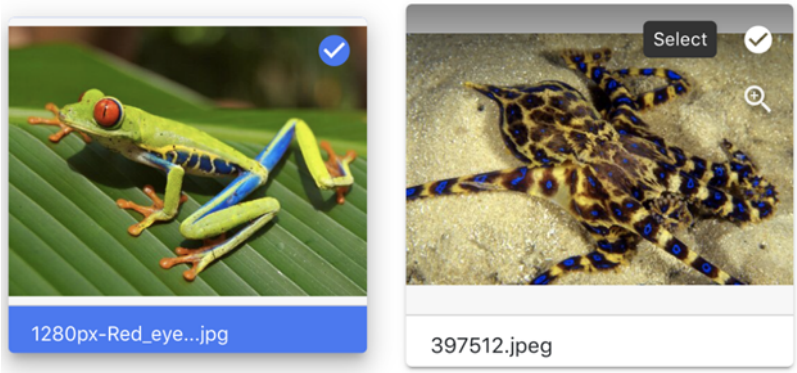
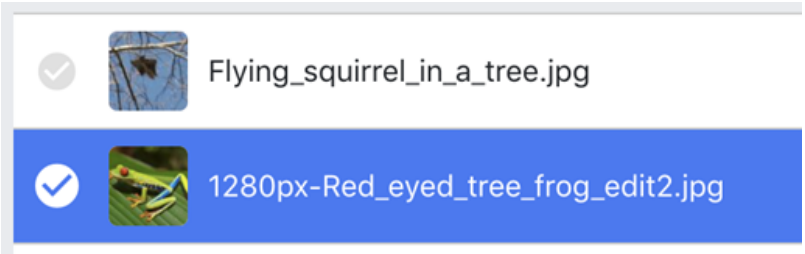
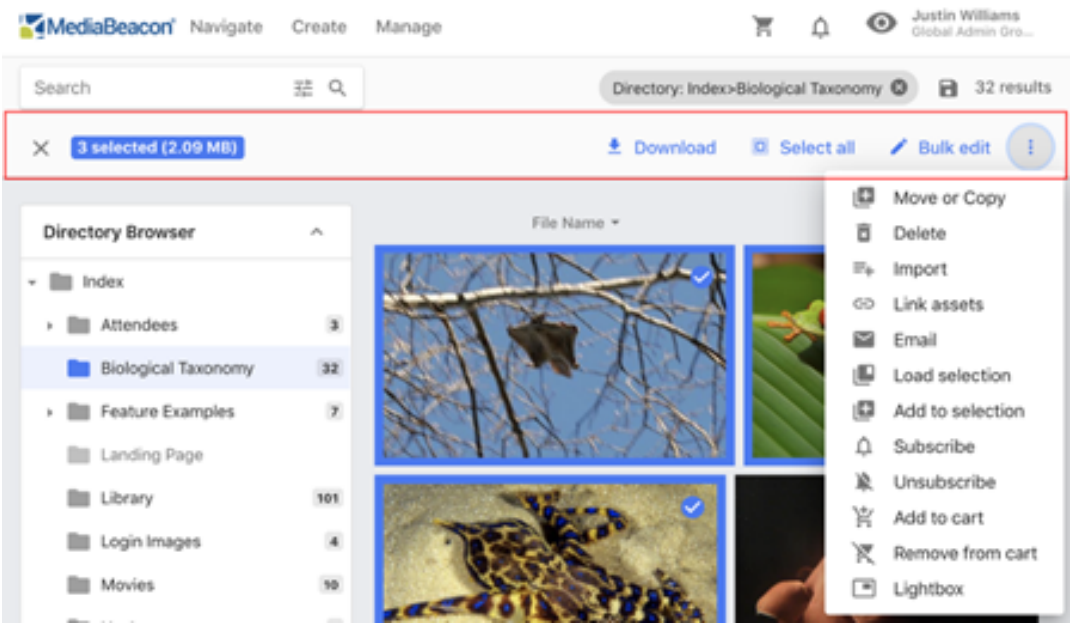


Figure 14: List View



Selection Bar: When assets are selected, this section will be shown under the Search Bar.



- Controls, Left to Right
  - Clear Selection (X Icon)
  - Assets Selected notifier
  - Download, Select All and Bulk Edit buttons#allow quick access to common multi asset selections.
  - Selection Action menu, commands previously in the "Selection" contextual submenu.
- When not in Selection Mode, a single click on the asset preview will open the asset view.

Deselecting Assets

Assets may be deselected by:

- Clicking another asset, this will clear any other selections.
- Shift-clicking a currently selected asset.
- Clear Selection keyboard shortcut:
  - macOS: Command + Shift + x
  - Windows: Ctrl + Shift + x

Using Commands on Asset Selection

Many commands can be applied to an asset selection, click below to read more on each topic.

- Create Menu *Menu Bar* on page 15 commands
- Selection menu *Selecting Assets* on page 62 commands
- View Component Contextual *View Component Contextual Commands* on page 69 Commands
  - Sub menu commands
  - *Keyboard Shortcuts* on page 31

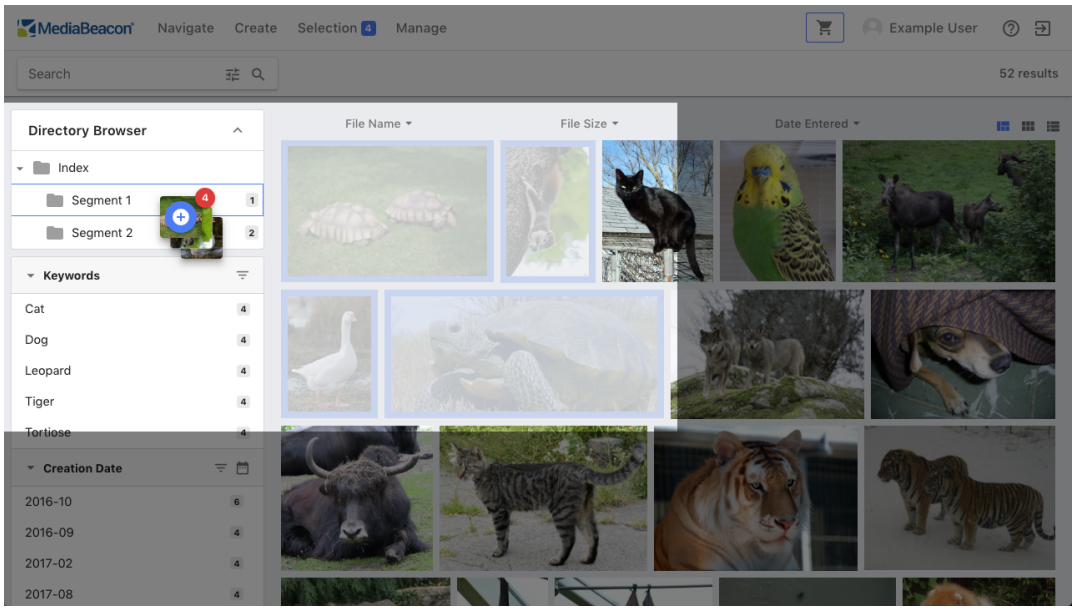
Drag and Drop within MediaBeacon

An asset selection may be dragged and dropped on various components within the MediaBeacon Web UI to apply a variety of commands to the selection. When the user clicks and holds on an asset in an asset selection, an **asset stack** is shown.

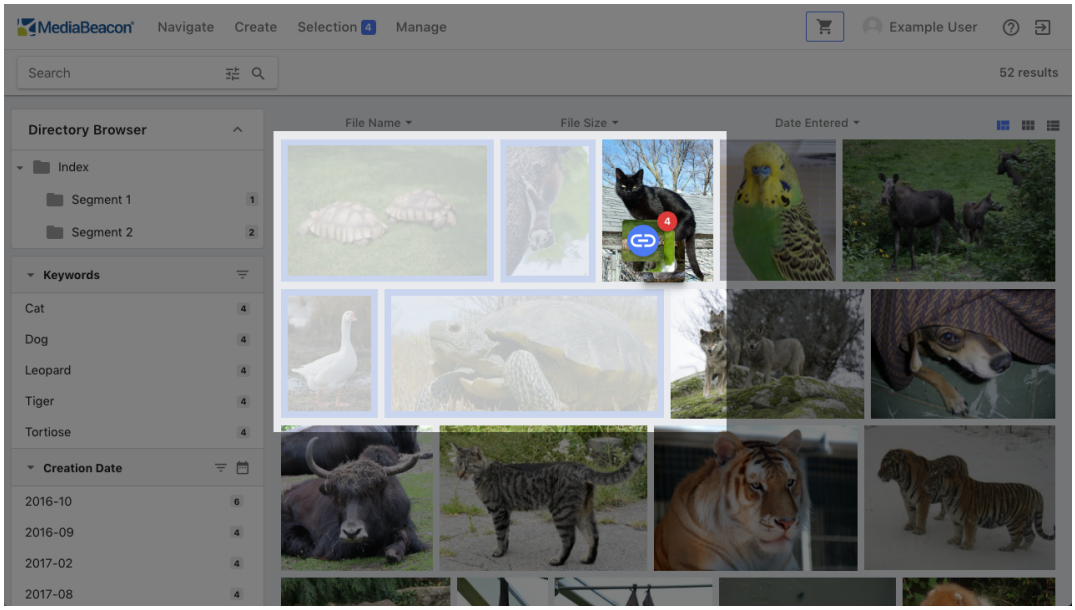
This displays previews of the first three assets, and a count of the assets. This tracks the cursor and indicates what function will be applied by overlaying a function icon on the top asset preview.

Drag and Drop Actions

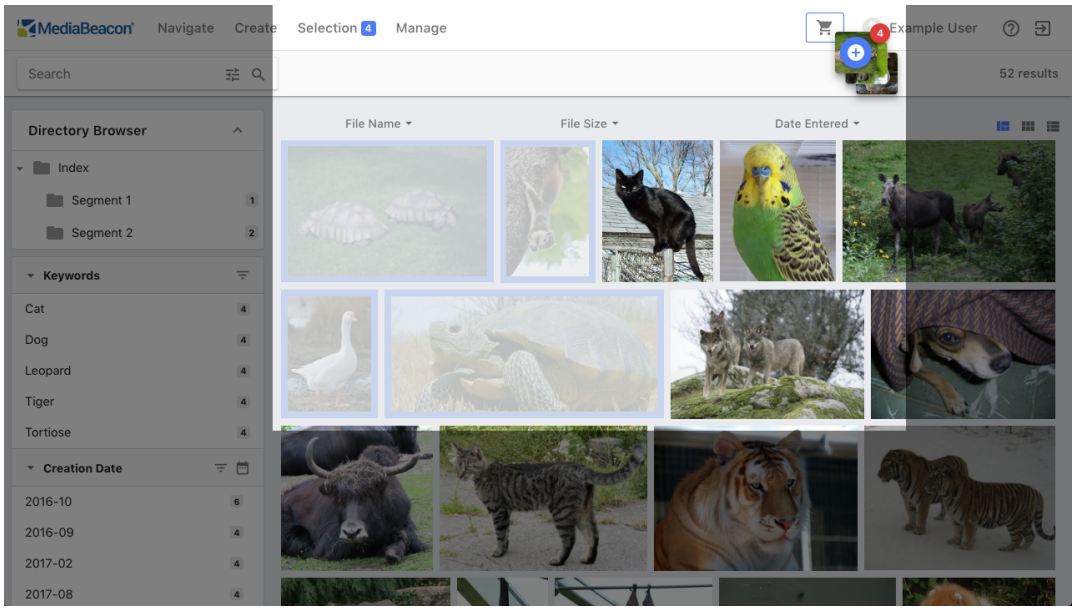
- Directory Browser Component: Move or copy assets: Drag-hover a selection of assets over a directory. Once released, the Move/Copy Selection dialog will be displayed, allowing the user to choose to move or copy the assets. If the directory hovered over has any subdirectories, it will autoexpand, allowing the user to drop into a child directory.



- View Components: Link assets: Drag-hover a selection of assets over a directory. Once released, the **Link Assets** dialog will be displayed, allowing the user to create asset links.



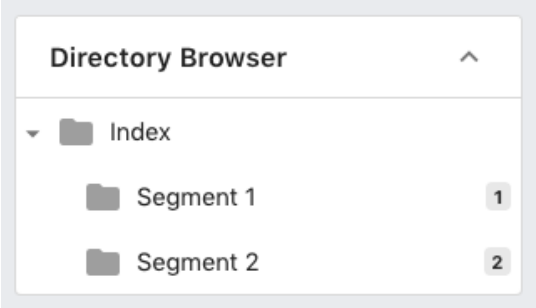
- Cart Component: Cart Icon: Drag-hover a selection of assets over the Cart icon. Once released, the assets will be added to the Cart.



- Search Filter and Taxonomy Components: Add metadata: Drag-hover a selection of assets over a value. Once released, the Update Metadata dialog will be displayed, allowing the user to confirm or cancel the addition of that metadata value to the asset selection.

3.8.2. Directory Search Component

The directory browser component allows users to interact directly with directories in the file system.

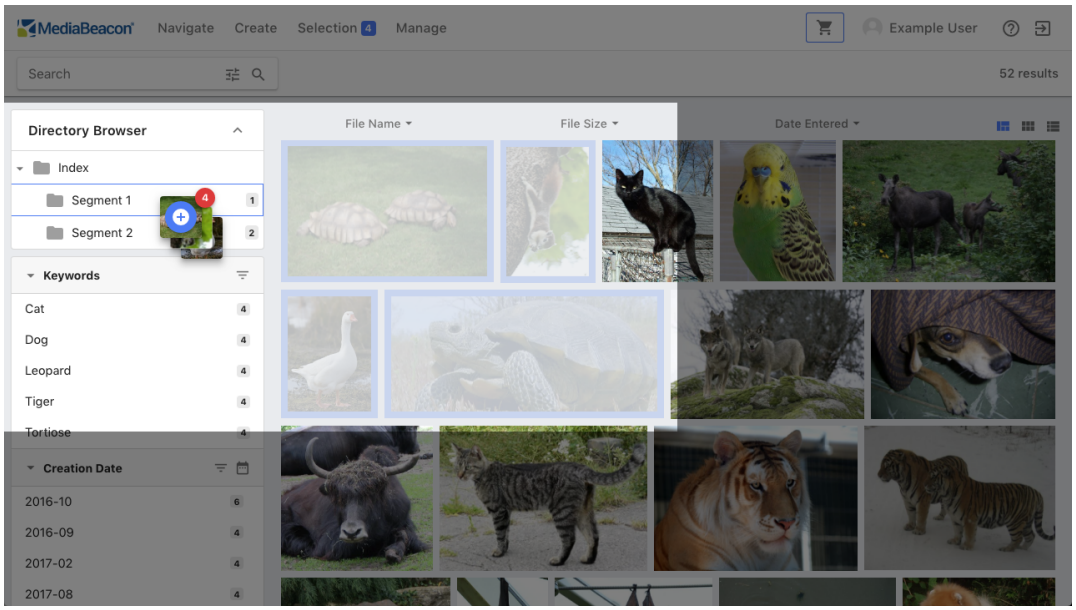


Clicking a directory will clear the current search and add the chosen directory as the current search criteria, filtering all results to assets in that directory and any subdirectories.

Directories containing subdirectories may be **spun open** to show their contents using the spin down triangle icon, to the left of the folder icon.

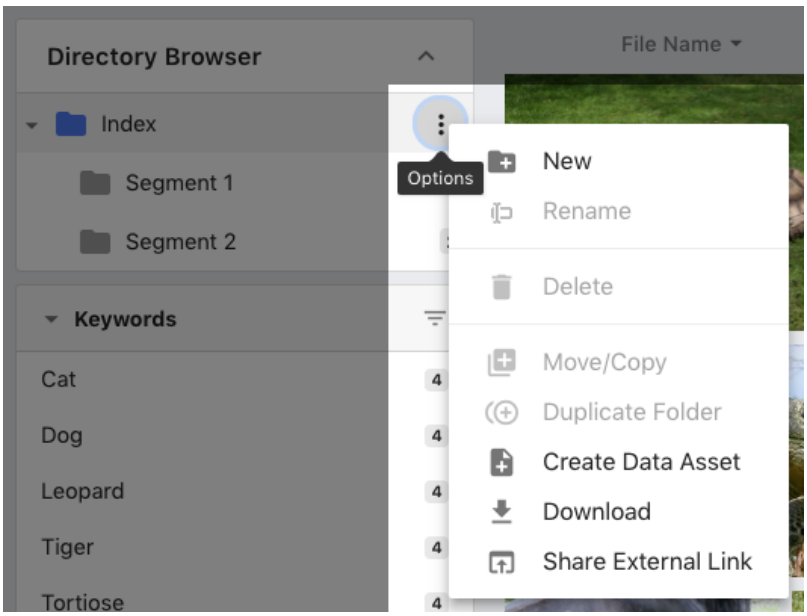
Drag and Drop Action

Move or copy assets: Drag-hover a selection of assets over a directory. Once released, the Move/Copy Selection dialog will be displayed, allowing the user to choose to move or copy the assets. If the directory hovered over has any subdirectories, it will auto expand, allowing the user to drop into a child directory.



Contexual Menu Commands

This menu is shown when the user right-clicks a directory or clicks the options icon.



File Action Commands

The following commands allow the user to manipulate directories. Not all commands may be available to all users.

- **New:** Create a new directory.
- **Rename:** Rename a directory. This can also be done by double-clicking the directory name.
- **Delete:** Delete a directory and all files within it, permanently.
- **Move/Copy:** Move or copy a directory and all contents.
- **Duplicate Folder:** Duplicate a directory and all contents.
- **Download:** Download a directory and all contents.

Expanded Privilege Commands

These commands are usually reserved for users with a management role in the system:

- **Import:** Regenerates previews. See the Admin Manual section for more information.
- **Bundle** & **Folder Info:** Allows the user to create folder bundles. See Bundles for more information.
- **Create Data Asset:** Allows the user to create a data-only asset in the selected folder. See Data Assets for more information.
- **Share External Link:** Allows the user to share an entire directory with a link that requires no login. See Share External Link for more information.

Optional Interface Elements

- Drag and Drop File Upload: When enabled, this allows files from the user's desktop to be dragged into a specific directory so that they are uploaded to that directory.
- Change Directory on Selection Move/Copy: Once a move or copy operation is completed, this function will automatically select the target directory of that action, displaying all assets in that location.

3.8.3. View Component Contextual Commands

Many commands for asset manipulation reside in this contextual menu.

This menu is accessed by right-clicking an asset in a view component, or on the asset preview in the asset view.

Contextual Menu Selection States 2019.1+

In these versions of MediaBeacon:

- When there is no asset selected, the contextual menu displays commands that can be performed on the asset that was right-clicked.
- When there is a single asset selected, the "Selection" sub menu is shown.

- When multiple assets are selected, the contextual menu displays commands that can be done to multiple assets at once.

Figure 15: Contextual menu with no selection

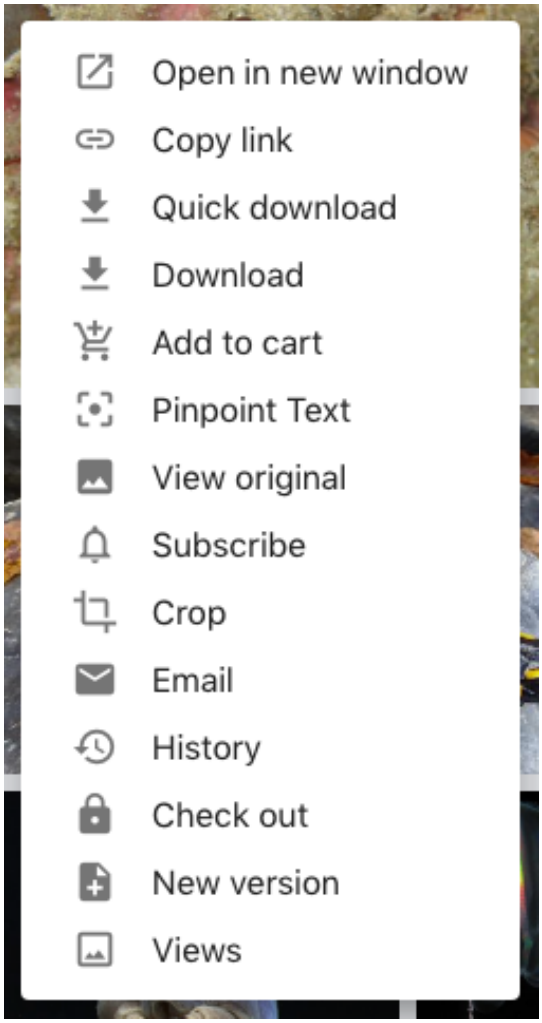


Figure 16: Contextual menu with a single asset selected

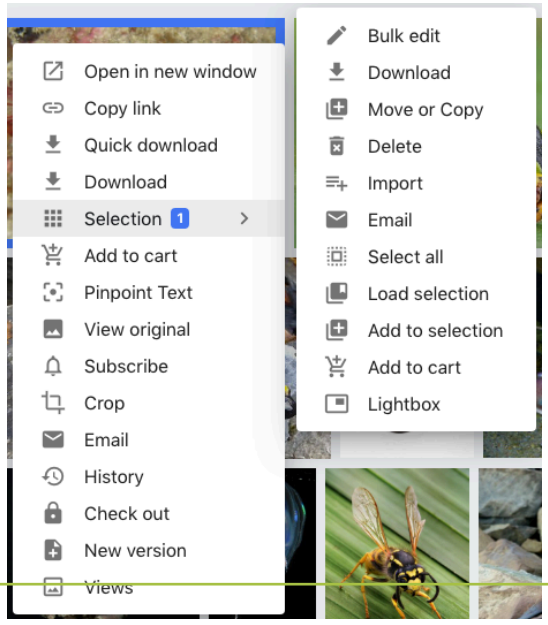
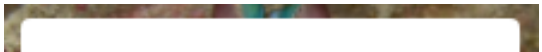


Figure 17: Contextual menu with a multiple-asset selection



Contextual Menu Selection States 8.x 2019.0

View component contextual menu commands act upon the asset that was right-clicked upon only, unless the command resides under the "Selection" sub menu. In this case, the command will be performed on all the assets in the selection.

Note: This excludes the commands: *Selection > "Select All" and Selection > "Load"*, see description below.

There are two states that the contextual menu may be in, opened without an asset selection, and with asset selection.

Figure 18: Contextual menu with no selection

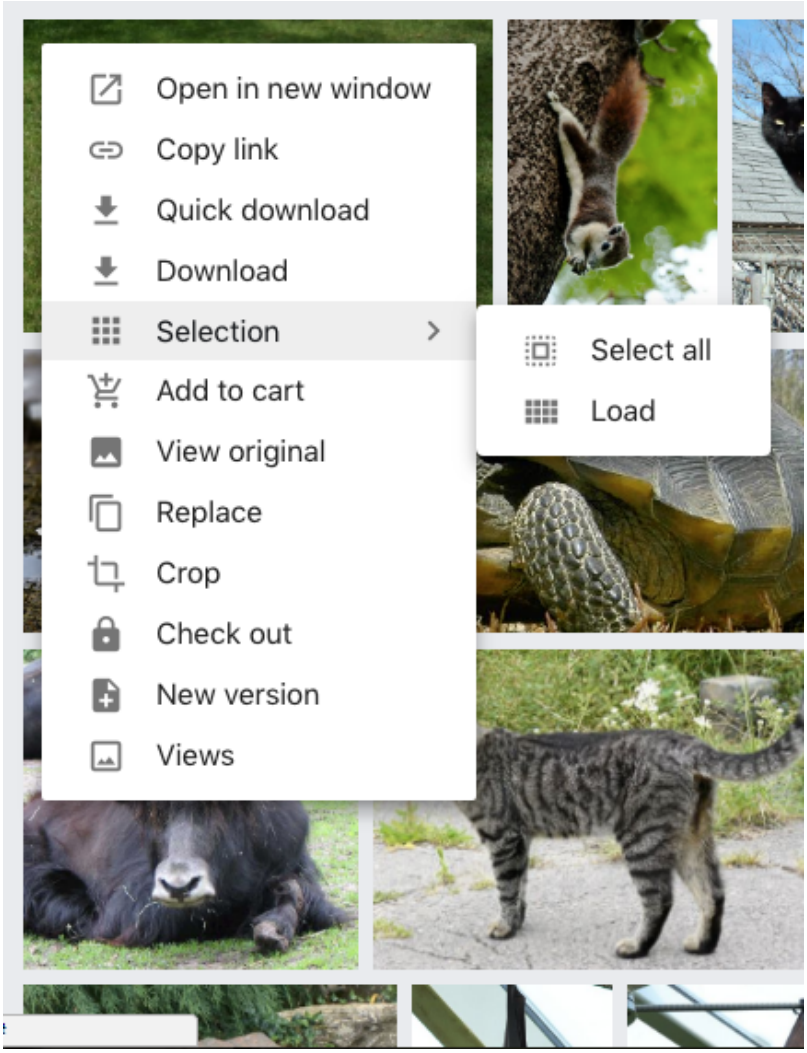
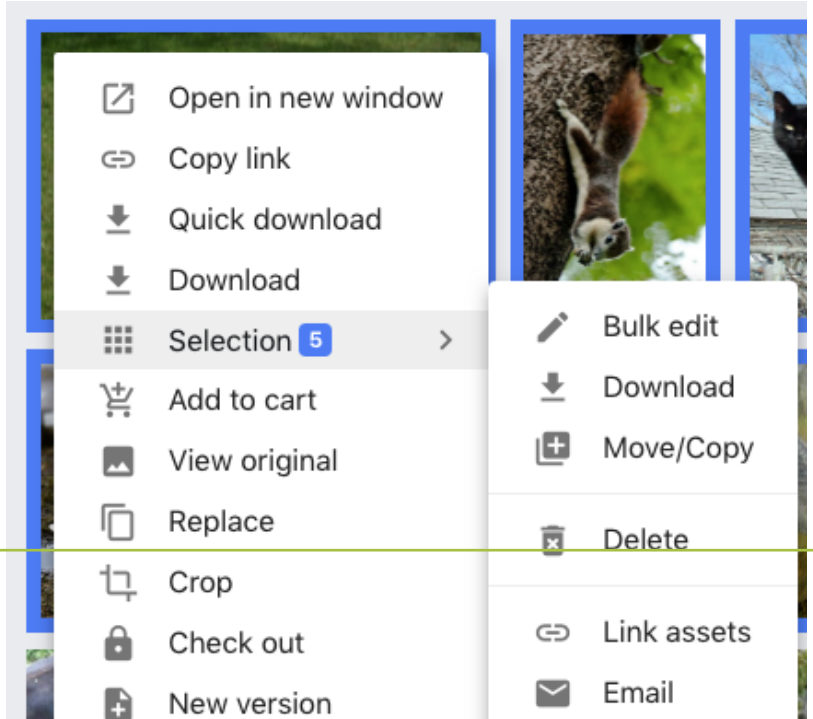


Figure 19: Contextual menu with a selection



Contextual Menu Commands

The commands in this menu only act upon the asset clicked, with the exception of the "Selection" sub menu. Commands there act upon all assets in the selection.

- **Open in new window:** This command opens the current workspace in a new browser window, with search criteria set to the clicked *Asset ID* on page 11, automatically opening the asset view.
- **Copy link:** This copies an URL to the clicked asset. When followed, this link opens a browser window in the same way "Open in new window" does. Note that a user must be logged in and have access to the asset in order to view it.
- **Quick download:** This command will download the clicked asset to the user's computer, in the original format, with all XMP metadata.
- **Download:** This command allows the user to download the clicked asset with a choice of conversions into other formats. These may be presets or custom, depending upon instance configuration. See the *[Download Conversions]* section for more information.
- **Selection:** This is a sub menu, discussed below.
- **Add to cart:** This will add the clicked asset to the cart, See *[Cart]* for more information.
- **Pinpoint Text:** Displayed only when search criteria are present, this command shows text excerpts the indicate the metadata found my the current search criteria.
- **View original:** This command acts differently upon assets depending on their format. When the asset can be displayed in a browser natively (such as JPG, PNG, and GIF), the asset will be opened in a new browser window. When the asset is of a non-natively displayable format, it will be Quick Downloaded.
  - **Note:** If the asset clicked is a PDF, this menu command will display as "**Open PDF**".
- **Replace:** This function allows a user to replace an asset's content, while retaining its metadata. The Replace Asset dialog will be shown, with an option to keep or replace the asset's name. See the *[Replace]* section for more information.
  - **Note:** This function is not present in MediaBeacon 2019.2.
- **Subscribe**: New to 2019.2, this function is described in detail in the Subscription Notification System article.
- **Crop:** This command allows the user to choose to crop an image, and then download conversion. The Crop dialog allows users to drag out a crop area, either unconstrained or set to a choice of aspect ratios.
- **History:** This command allows the user to view the raw log of actions that have occurred in the system. The History dialog's contents may be filter on a number of criteria; actions to a given asset, done by a specific user or group, actions in a date range, and by type of action. The displayed information may also exported to a CSV file. Note: This function is not typically available to end users.
- **Check out, Check in, and Cancel check out:** See the *[Check Out]* section for more information on this function.
- **New version:** See the *[Version]* section for more information in this function.
- **Views:** This command allows users to replace the preview of an asset. This does not affect the downloaded asset's contents. Typically, this would be done when an image's rotation was incorrect, or if the asset was of an non-pre viewable file type. The Modify Asset Views dialog allows rotation change, and to attach a JPG file of no larger than 1920x1920 as a alternate preview.

Selection Sub menu

The commands here act upon all assets in the selection. It also has the same list of commands in the

- **Bulk edit:** This command allows the user to make metadata changes to an asset selection. See the *[Bulk Edit]* section for more information.
- **Download:** This command downloads as described above, but acts upon the entire asset selection.
- **Move/Copy:** As above, applying to the entire asset selection.
- **Delete:** Permanently deletes the entire asset selection.
- **Import:** Regenerates previews. **Note:** This function is not typically available to end users.
- **Link assets:** This command creates an asset link in all the assets of a selection.
- **Email:** This command opens the Email dialog, allowing users to email a set of assets to a list of recipients. The body of the email is automatically pre-filled with a list of the asset selection's URL s.
- **Select all:** This command selects all assets in the current view.
- **Load:** This command displays the Load Saved Selection dialog, allowing the user to load a previously saved selection.
- **Remove:** Displayed only when a user is viewing a saved selection, this command will remove the
- **Add:** This command displays the Load Saved Selection dialog, allowing the user to choose a previously saved selection to which to add the current selection.
- **Add to cart:** Adds the asset selection to the Cart.
- **Remove From Cart:** Displayed only when a user is viewing the Cart contents, it removes a asset selection from the Cart.
- **Lightbox:** This command displays the asset selection in the Lightbox.

3.8.4. View Components

MediaBeacon has several types of components that display assets in a variety of presentations

This includes: Infinite Scroll, Tile View, and List View (formerly called Text View).

Figure 20: Infinite Scroll

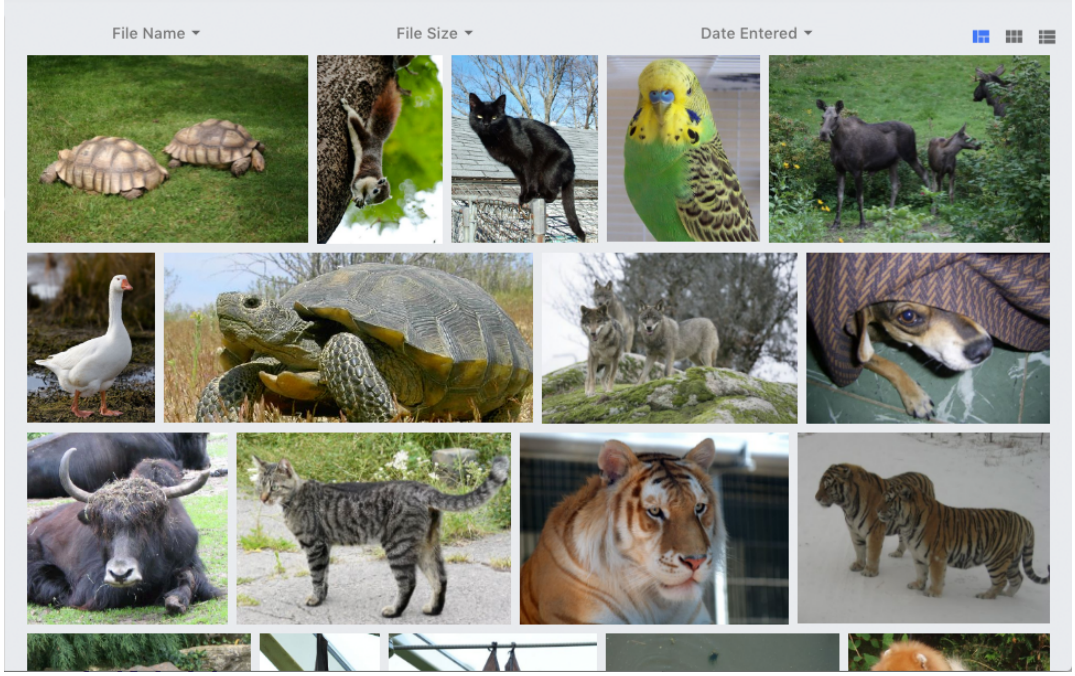


Figure 21: Tile View

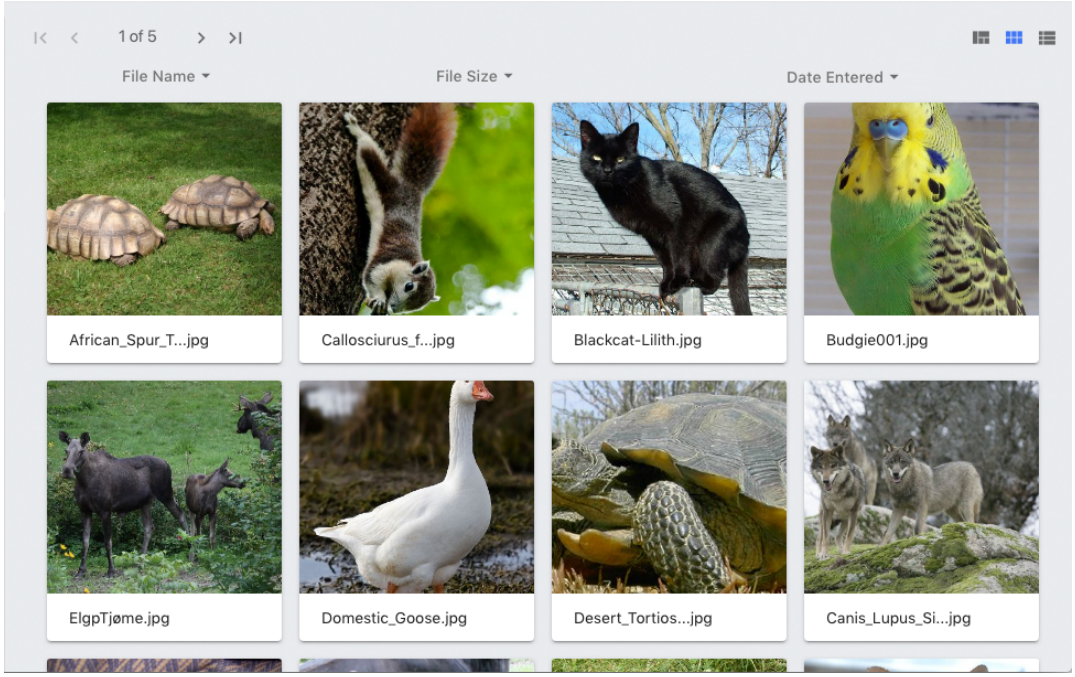
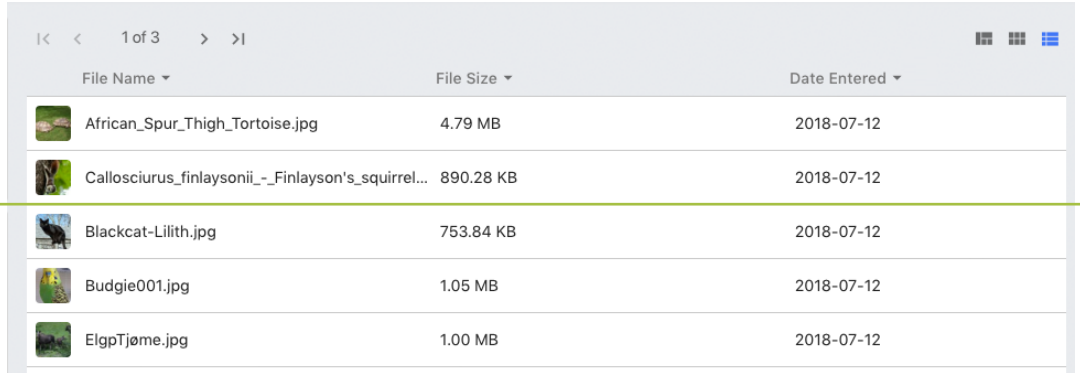


Figure 22: List View



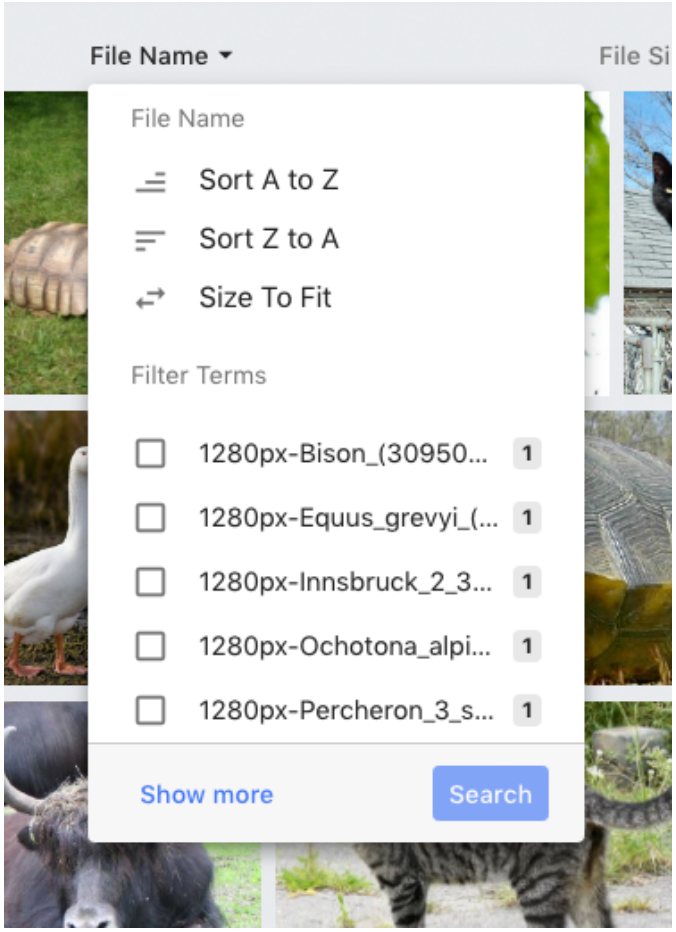
Common Features

View components share some common features.

Column Headings

At the top of the View Component is a set of metadata fields that may be used to sort or filter the assets shown. Common options include:

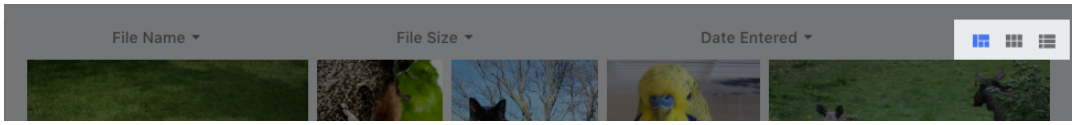
- Sort A to Z: for string fields
- Sort Z to A: for string fields
- Sort Smallest to Largest: for numeric fields
- Sort Largest to Smallest: for numeric fields
- Size to Fit: automatically size the column to fit



An administrator may change the list of displayed column headings.

View Switch Buttons

If more than one view component is present in a workspace. A set of icons will be displayed in the upper left of the view component to allow users to change the view component that is currently displayed.

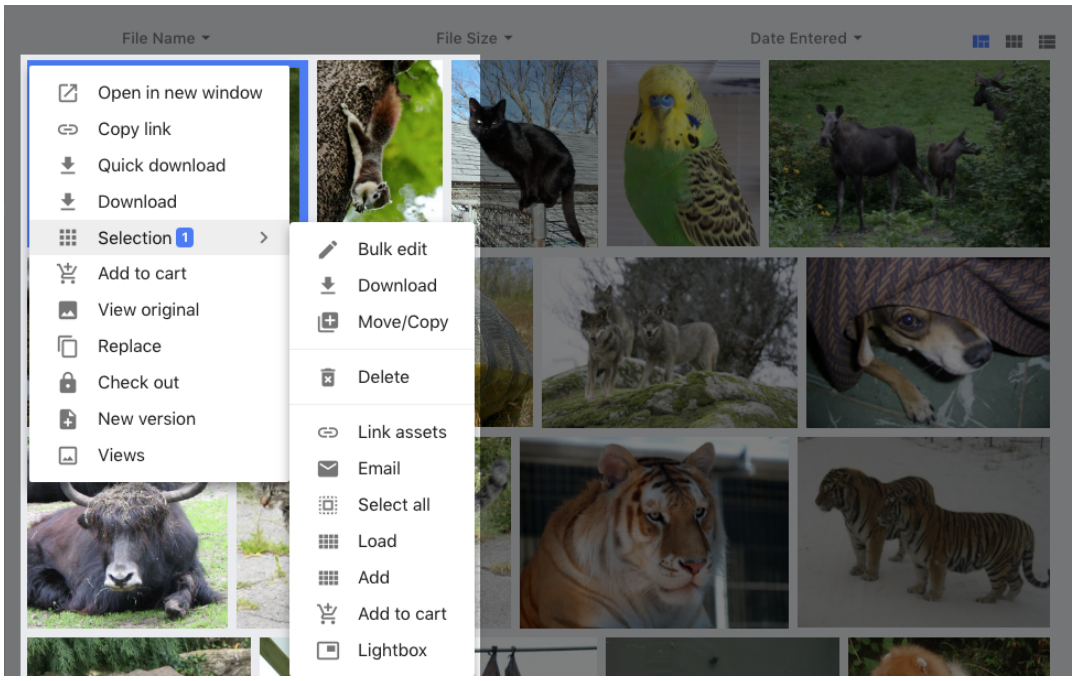


Shown here, left to right, are:

- Infinite Scroll
- Tile View
- List View
- Video Edit View

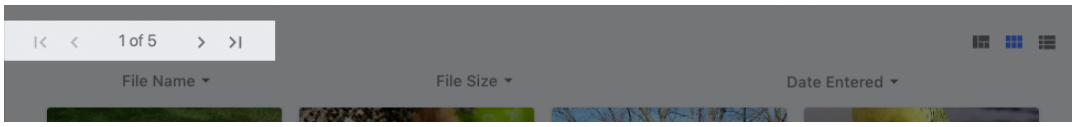
Contextual Menu

All view components have contextual menus containing an array of asset-oriented commands. Depending on the type of asset or search criteria, these may display differing commands, only showing those pertinent in a given case.



Pagination

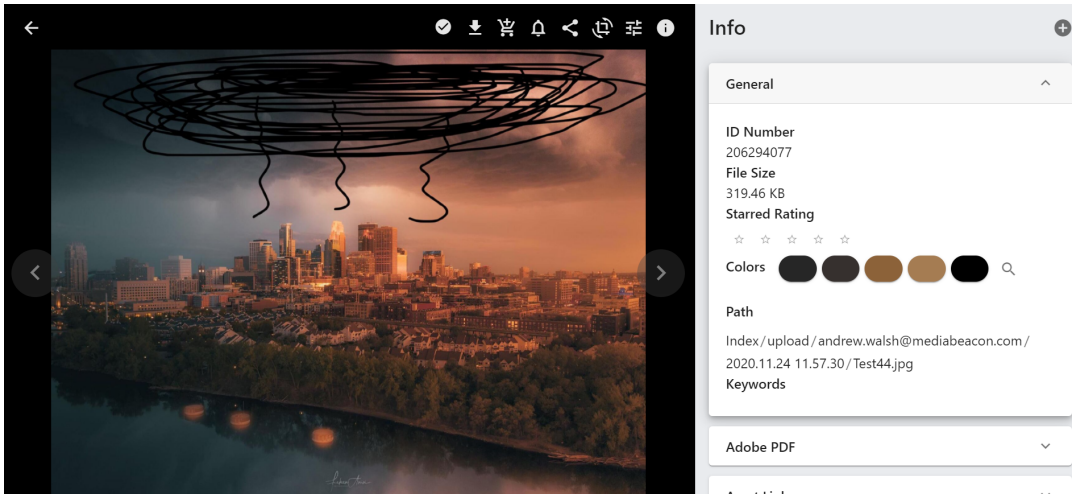
Several view components use a paginated interface to move between pages of assets:



Left to right these controls are:

- First Page
- Previous Page
- Current page Indicator
- Next Page
- Last Page

Asset View



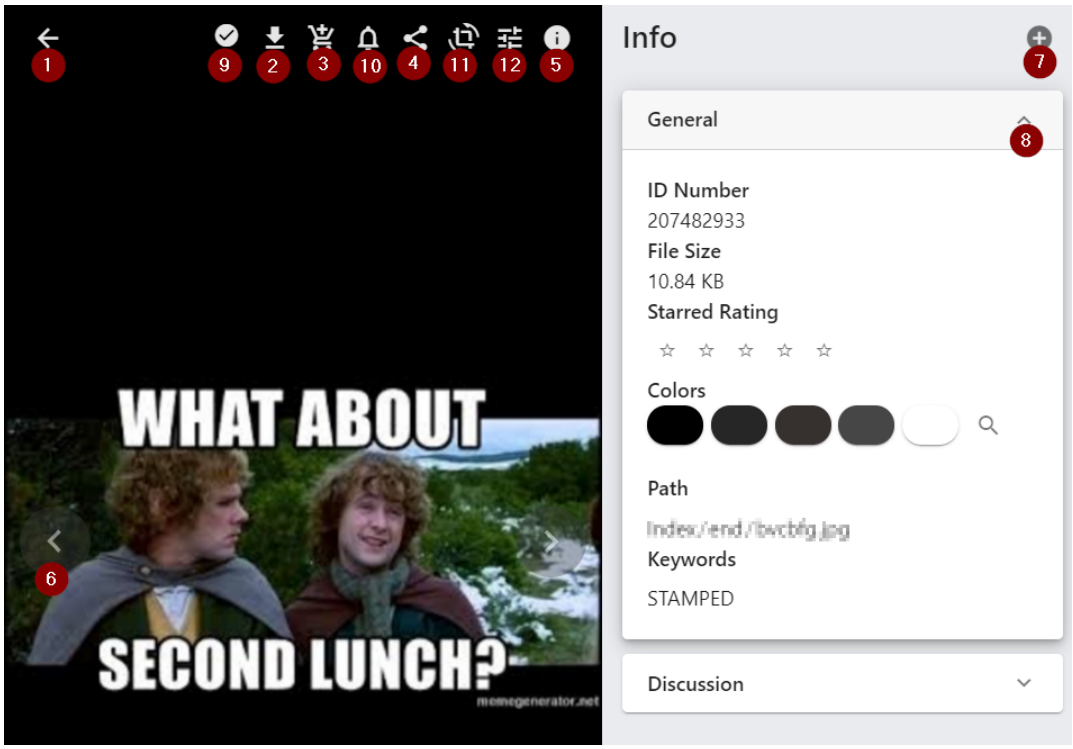
Asset View is accessed in any view component by either double clicking an asset or selecting the asset and pressing the space bar.

If an asset is in selection mode, the option is set to be "open asset view." By clicking on it the users can view the Metadata of the assets. This feature will help the users in mobile to get into asset view for browsing asset.

This dialog is the main way to view in-depth metadata and larger previews of assets.

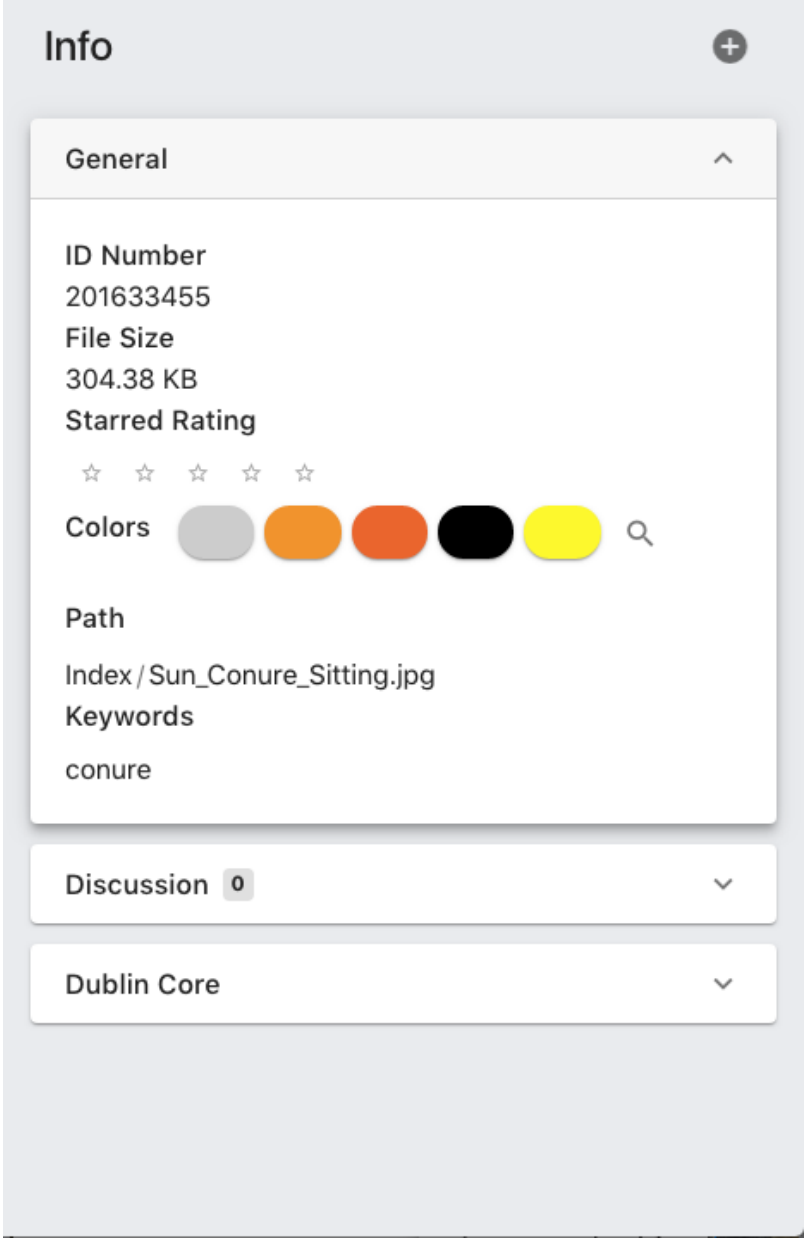
Added Select Icon to Asset View#The user interface of the asset view now provides a badge which helps the user to select or deselect the asset.

Action Buttons

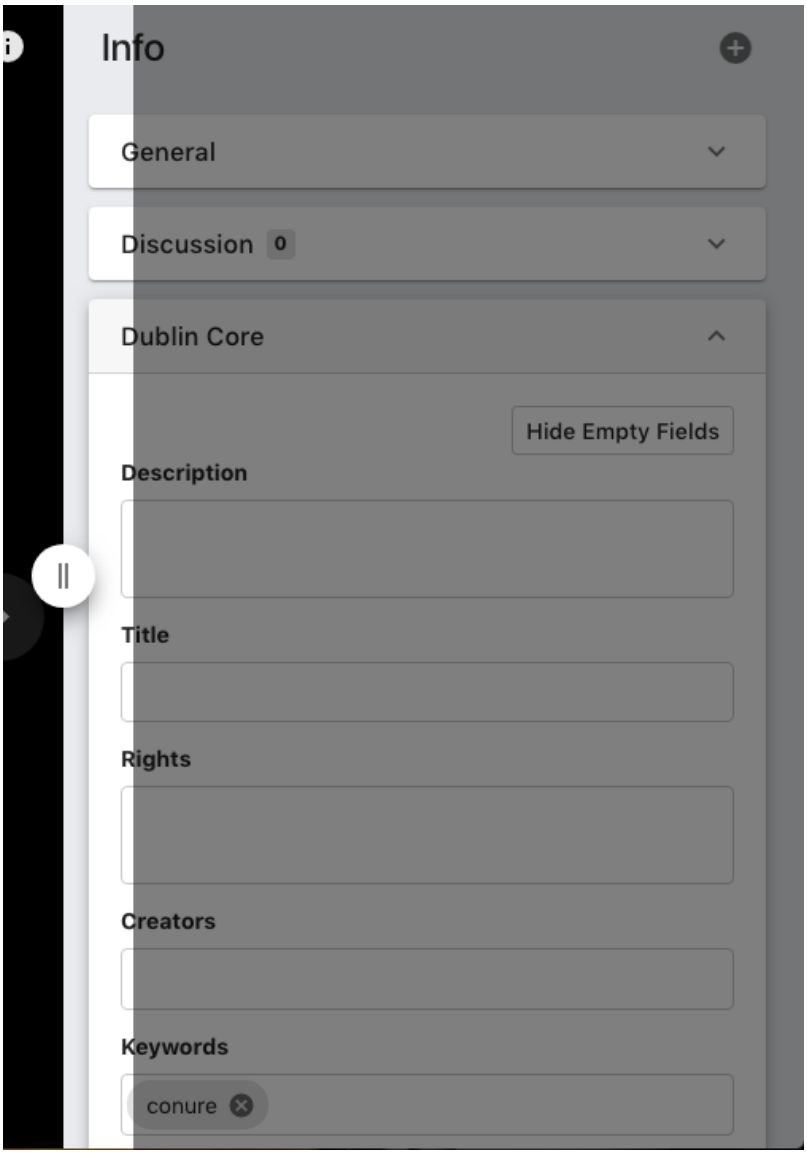


1. Back: To exit asset view, this also may be performed with the Escape key.
2. Quick Download: Downloads a copy of the asset.
3. Add to Cart: Adds the asset to the user's cart.
4. Share External Link: Sends a link allowing non-system users to download a file.
5. Toggle Info panel: Opens/closes the Info panel.
6. Pagination: Located on either side of the asset preview, these buttons allow the user to view the next or previous asset. Metadata values that have been entered but not been saved, will be saved when the pagination is used.
7. Add Form tab: Adds a new form tab
8. Toggle Form tab indicator: Opens and closes the info of the form.
9. Select: Select the asset.
10. Subscribe: Subscribe and Unsubscribe the asset.
11. Crop and Image rotate: Edit the asset by Cropping and Rotating.
12. Edit Image Colors: Asset colors can be edited.

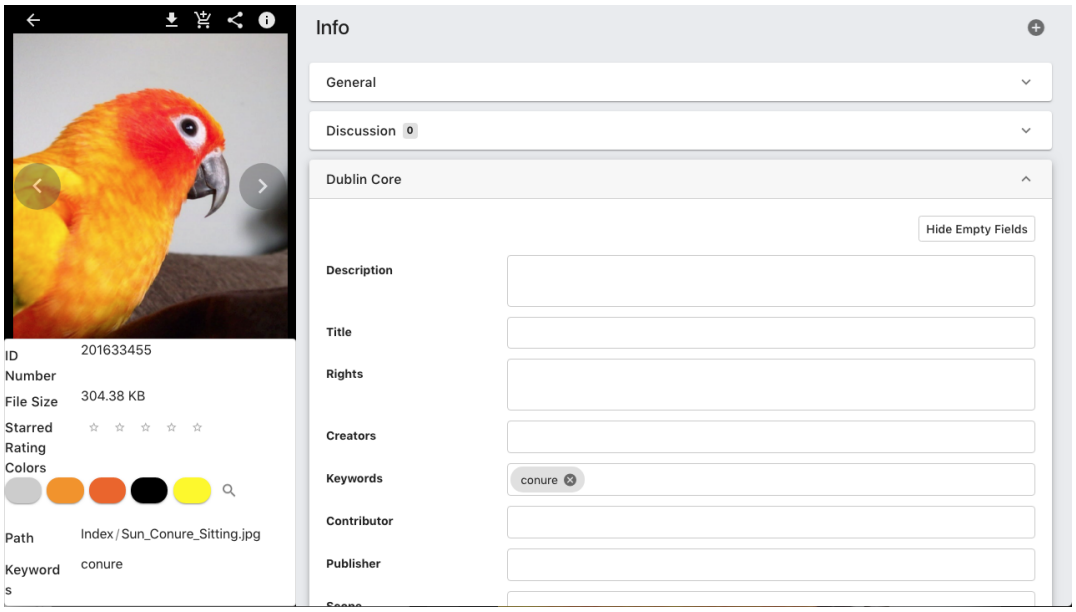
Info Panel



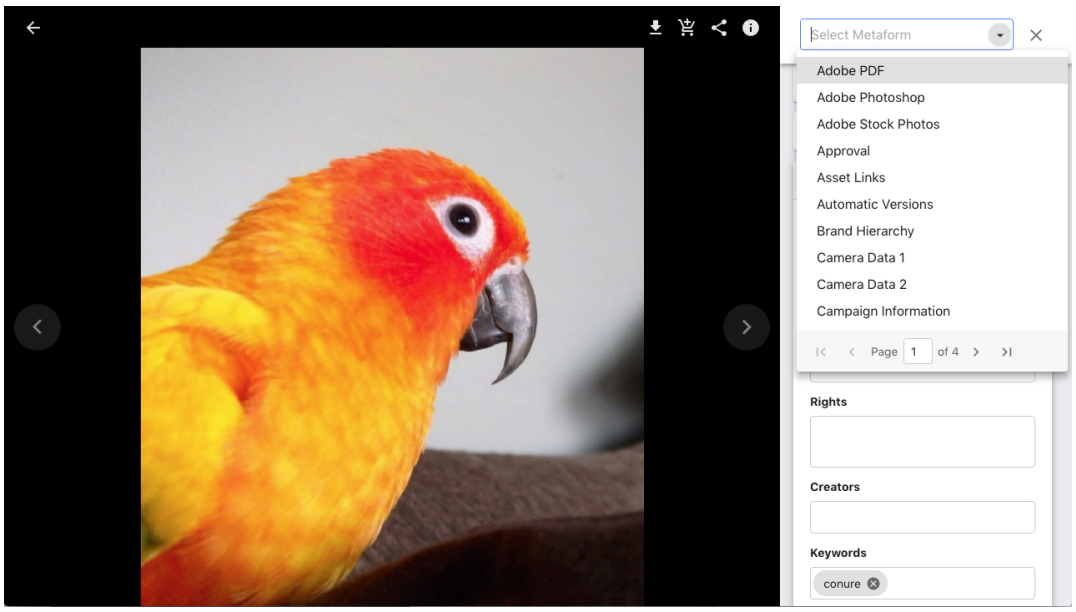
This area displays Form tabs, each containing a specific set of metadata fields. These may be clicked to open show the fields inside.



This area can be resized by mousing over the edge of the panel and click-dragging. When pulled fully to the left, the "General" tab will be displayed below the asset preview.

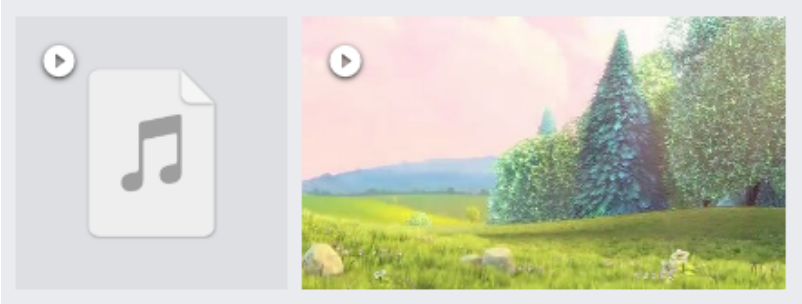


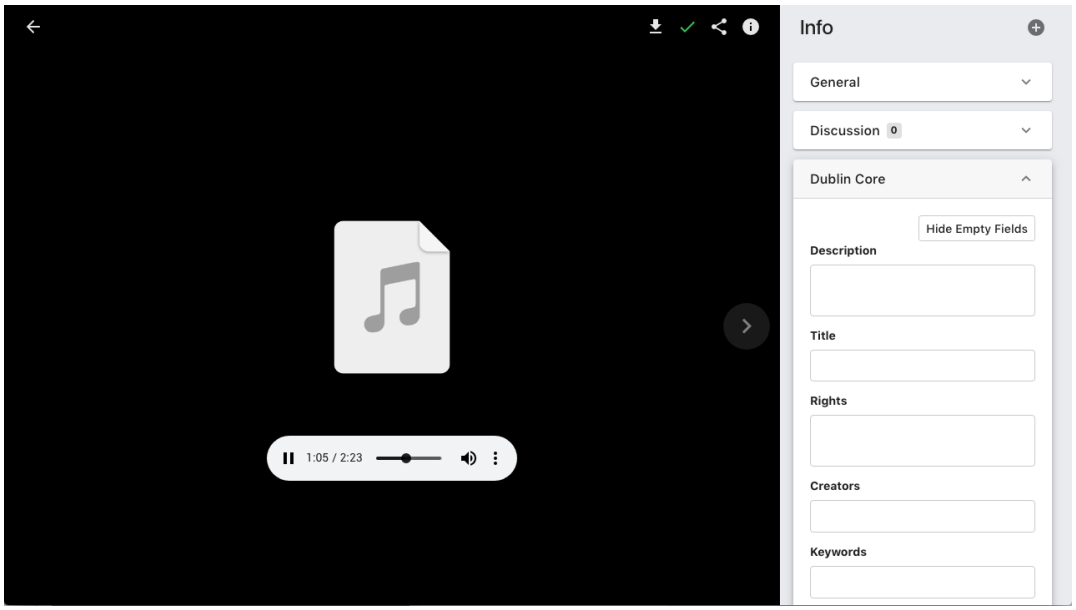
Additional metadata Forms may be added by clicking the "Add Form" button in the upper right.

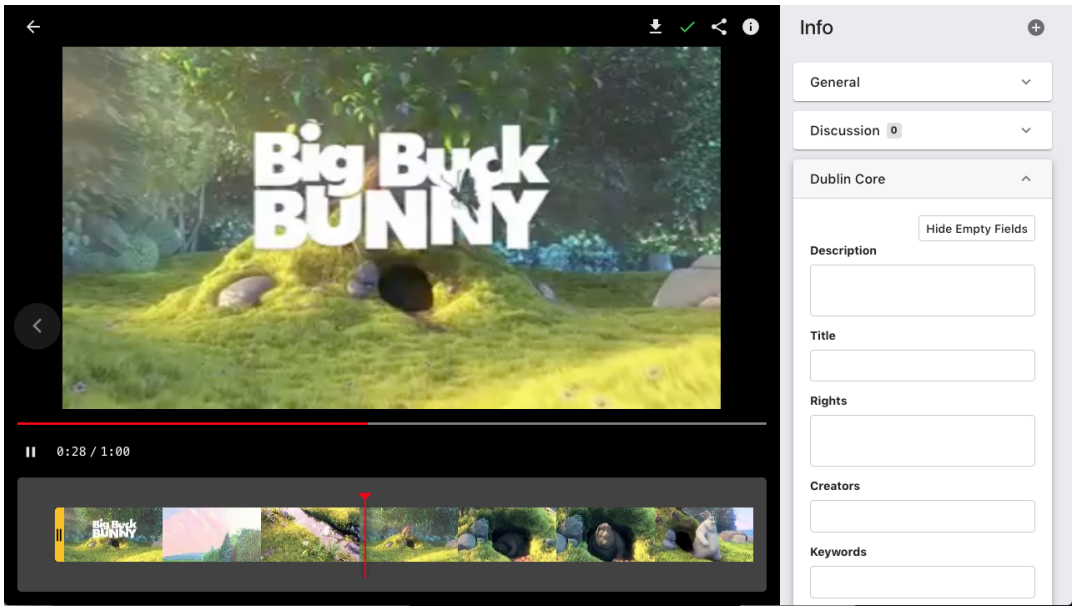


Multimedia Assets

Audio, video, and animated assets (that are playable in the browser) have a play icon in the upper right. This button will open the asset view and begin playing the asset.



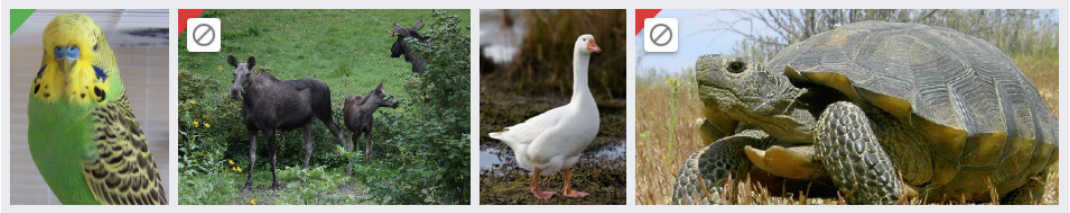

Info
General
Discussion 0
Dublin Core
Hide Empty Fields
Description
Title
Rights
Creators
Keywords
1:05 / 2:23


Info
General
Discussion 0
Dublin Core
Hide Empty Fields
Description
Title
Rights
Creators
Keywords
Big Buck BUNNY
0:28 / 1:00

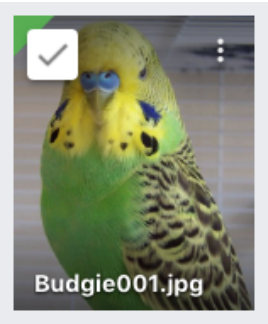
Additionally, hovering over a video asset will auto-play a set of key frames of the video. GIF files will also preview in this way.

Highlights and Badges

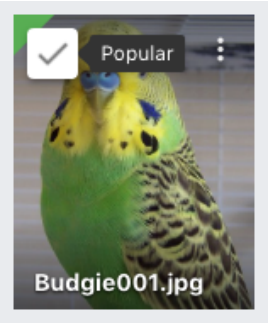
To denote a specific metadata status, assets in view components may display a color strip overlay in the upper-left corner of the preview image and/or one or more icons.



Icons may be hidden until the asset is hovered over

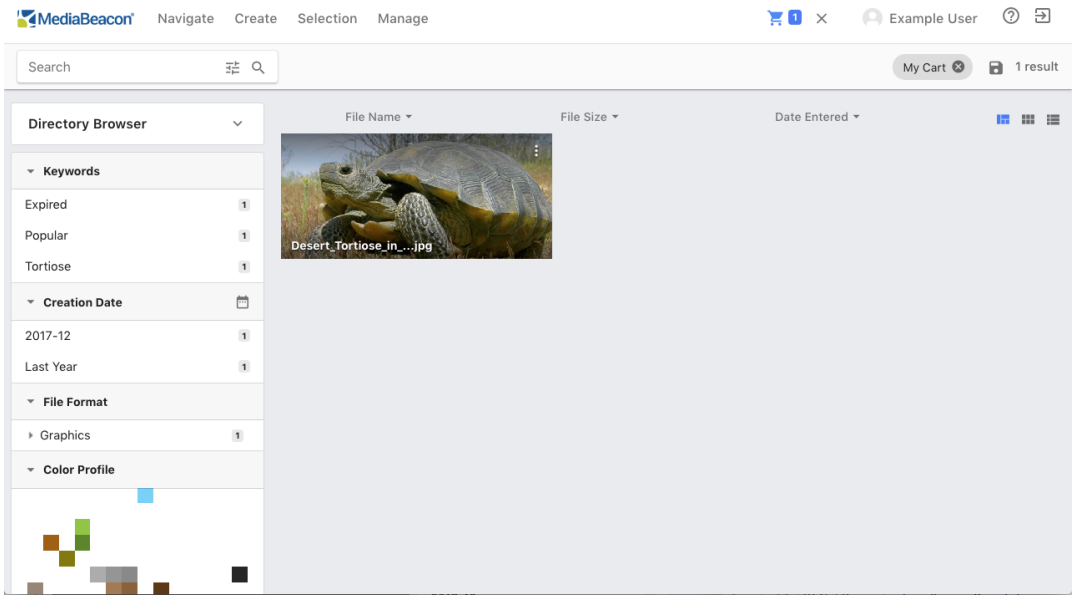


Icons may also show a label when they are individually hovered over.

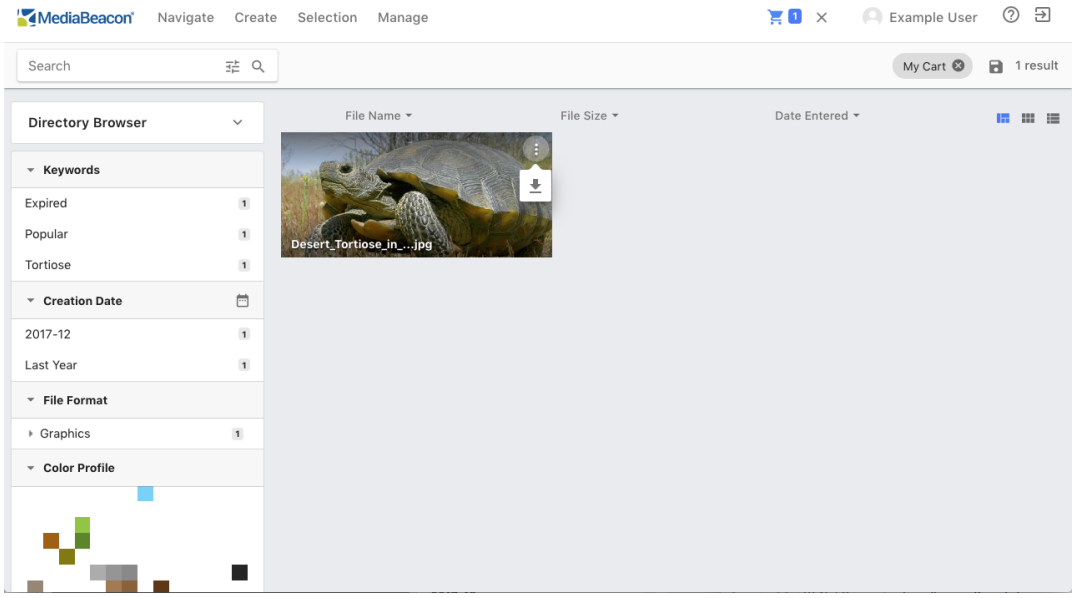


Asset Menu

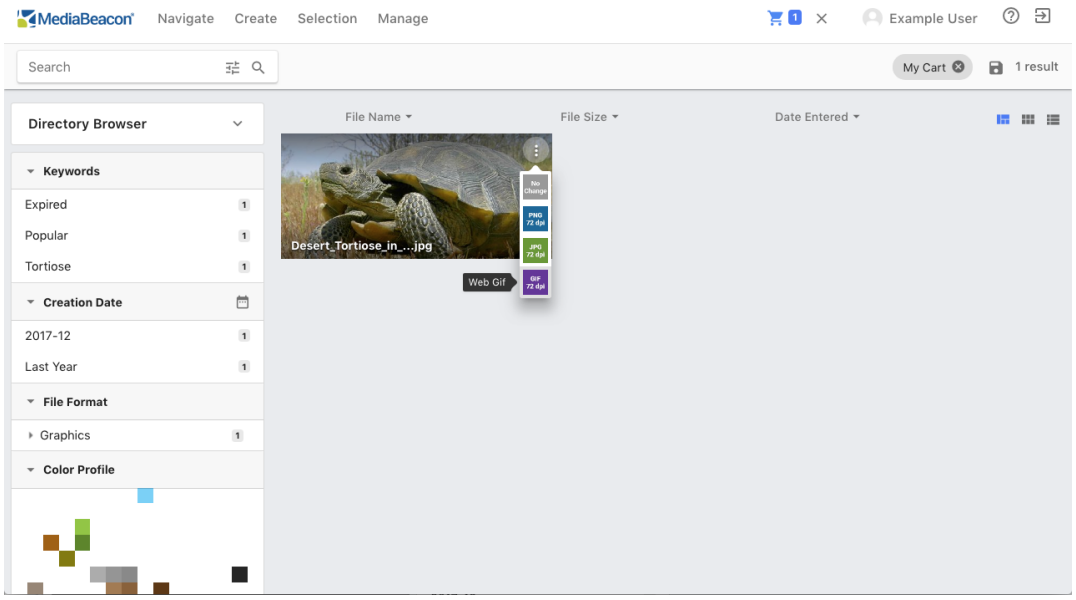
While hovering the mouse over an asset, the **asset menu** is shown.



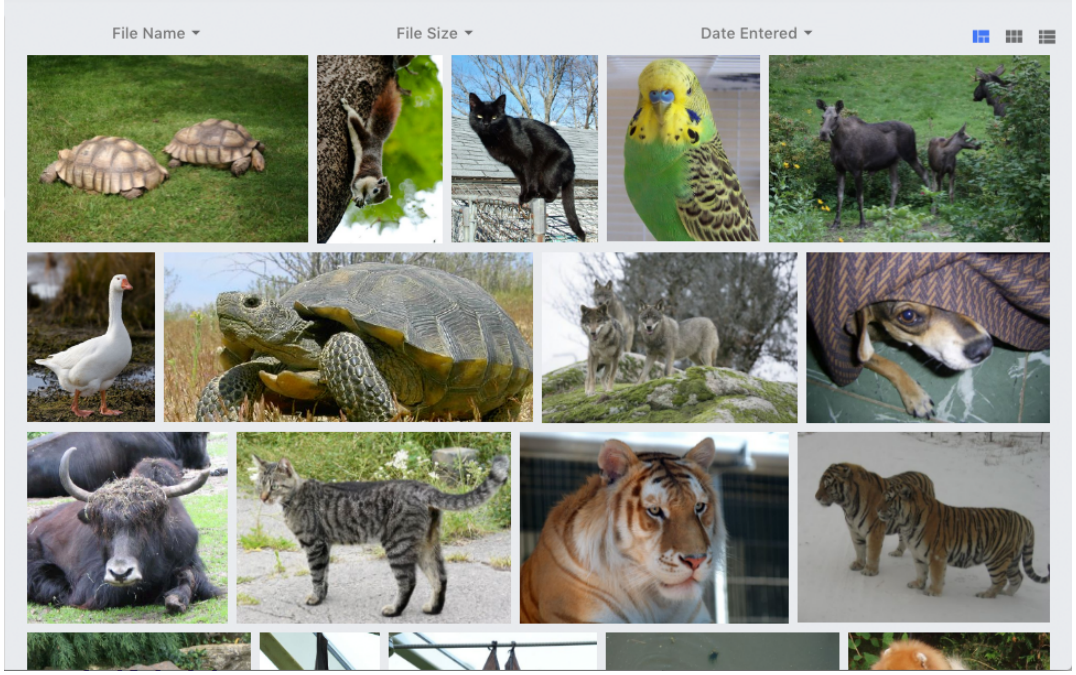
Hovering over this icon, a Quick Download button is shown.



The command shown here is Quick Download, but this may be replaced with a list of other download conversions.



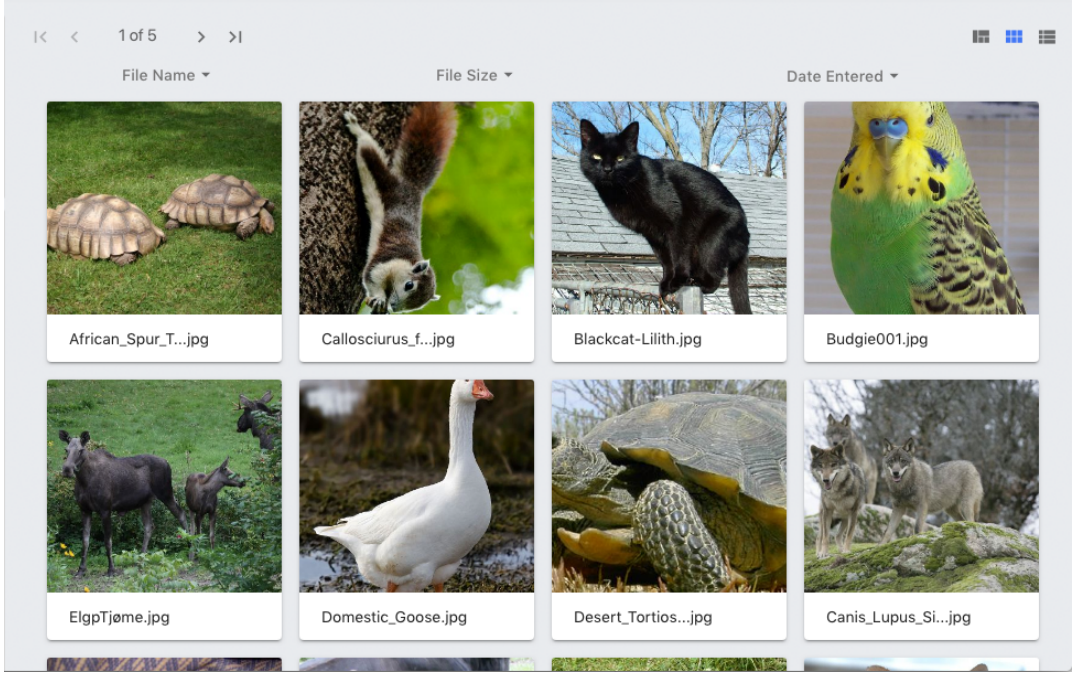
Infinite Scroll



This component will show all assets that are available in a user's current view, that is, the set of assets defined by their current search criteria. It does not have a paginated interface. Instead, users can scroll through a continuous list of asset previews.

The assets are presented without file names until the mouse is hovered over them.

Tile View



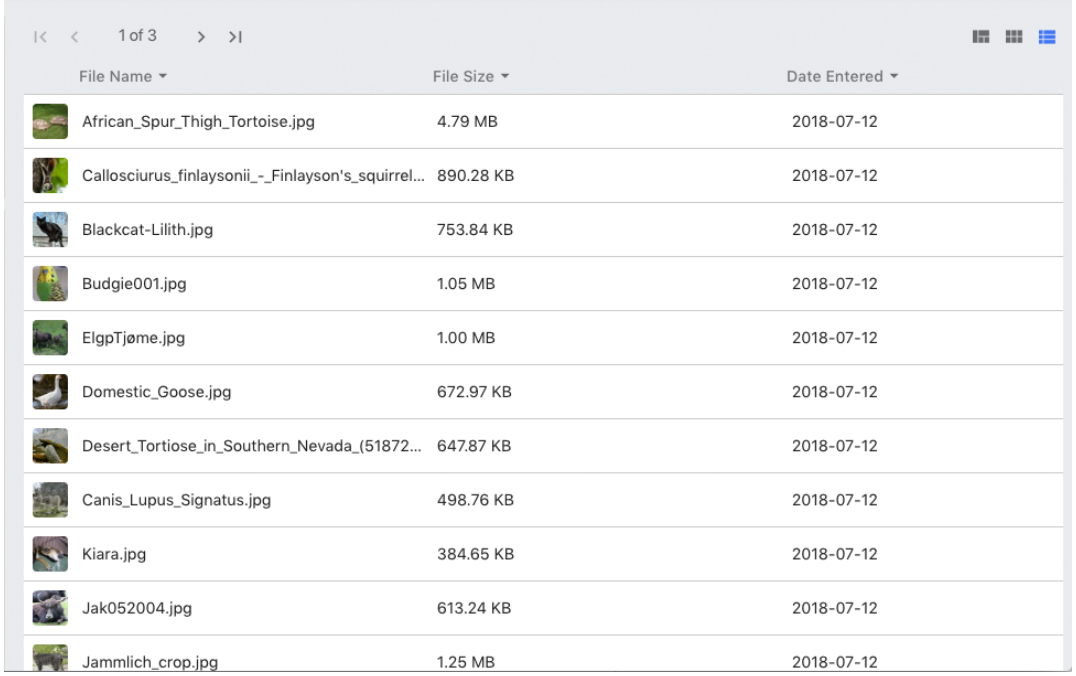
Tile View is very similar to Infinite scroll, except that:

- The asset previews are a fixed size, showing the center area of the asset preview.
- The interface is paginated, not continuous.
- The asset name is always shown.

Optional Configuration

A sizing slider may be present to the right of the pagination controls.

List View

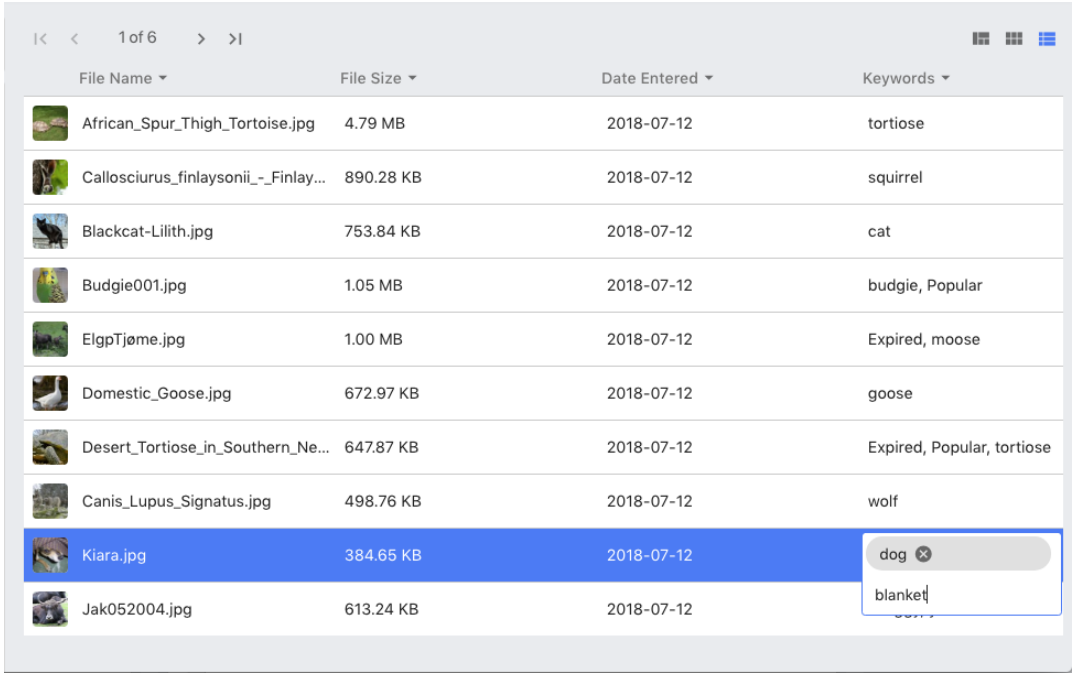


The List View displays assets as rows of information: a small preview image and the data corresponding to each metadata field used as a column heading.

Notable differences from the infinite scroll interface view components include:

- The interface is paginated, not continuous.
- Highlights only show the color tag, which is positioned in the corner of the row.

This view makes the search and filter capabilities of the column headings much more powerful because the data can be seen and edited directly.

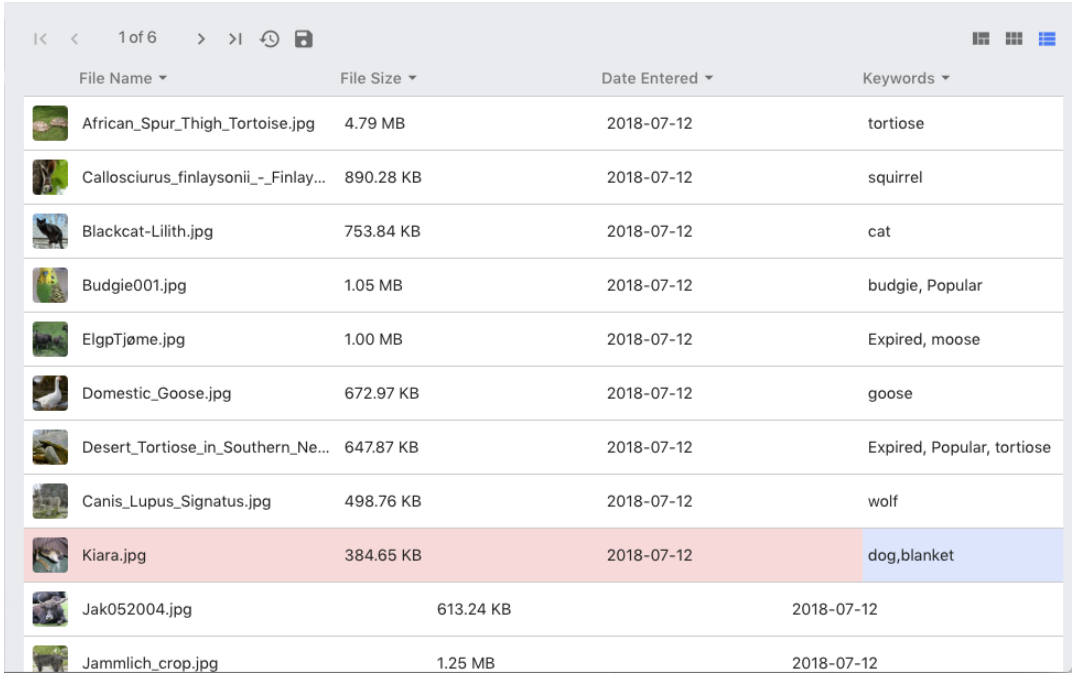


Editing metadata in this way is similar to the way cells in a spreadsheet are edited. The user double clicks on a field and can enter data and then use the following:

- Return, to begin editing the same field on the asset directly below,
- Tab, to begin editing the next field to the right of the current, or
- Shift-tab, to begin editing the next field to the left of the current.

Some fields types, such as a dictionary or text area may interfere with this, and may be clicked manually to begin editing.

Once a change has been made, that row will be highlighted in red, and any changed values will be highlighted with a contrasting color.



To reject the edits or commit them, click the Reset or Save icon respectively.

Note: An automatic save which will occur 20 seconds after activity has stopped.

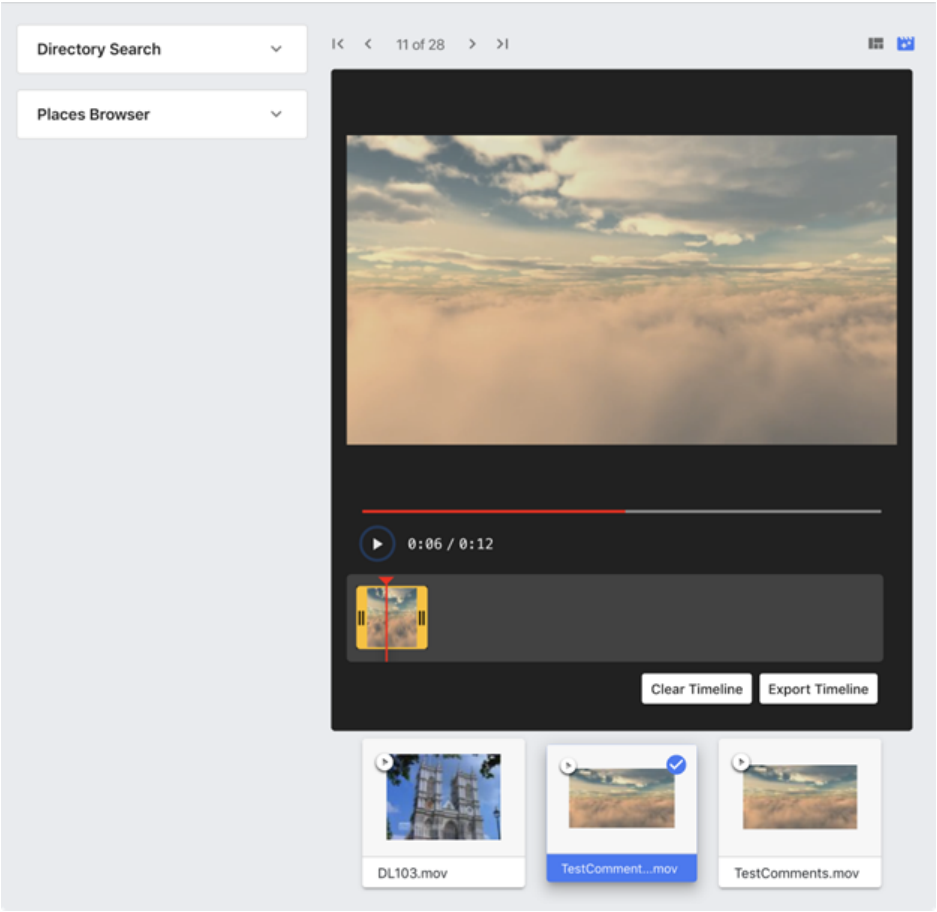
Optional Configuration

The list view may also have the **Import / Export Wizard** functionality enabled. For more information on this function, see the *Import / Export Wizard section*.

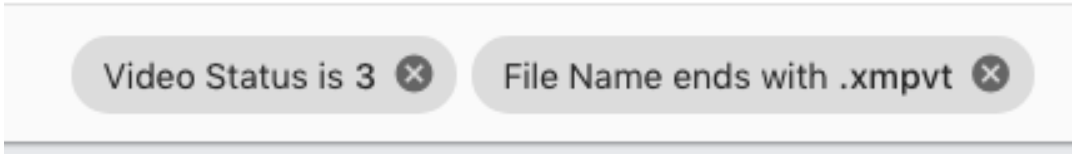
Video Edit View

The Video Edit View component allows users to create video storyboards called **timeline**. These can be saved as .xmpvt files. These can be opened and played by the Video Edit View.

The Video Edit View is similar to the Tile View, adding a video editing panel above a row of assets.

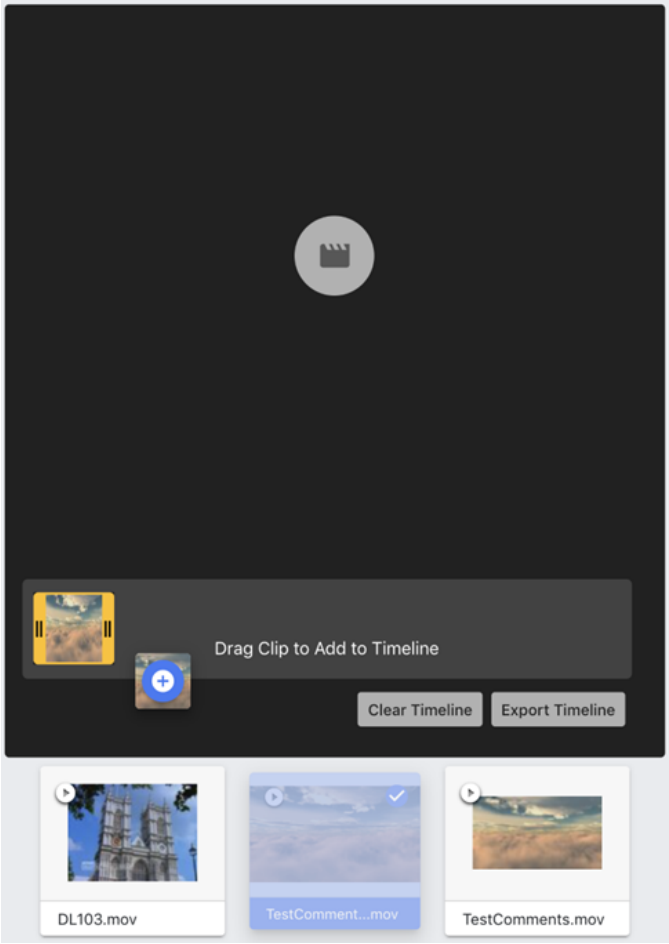


When using this view, 2 criteria are added that filter the assets shown to showing only video assets and timeline assets.



Creating Timelines

When an asset is dragged and dropped over the timeline area, it is added to the timeline as a clip.



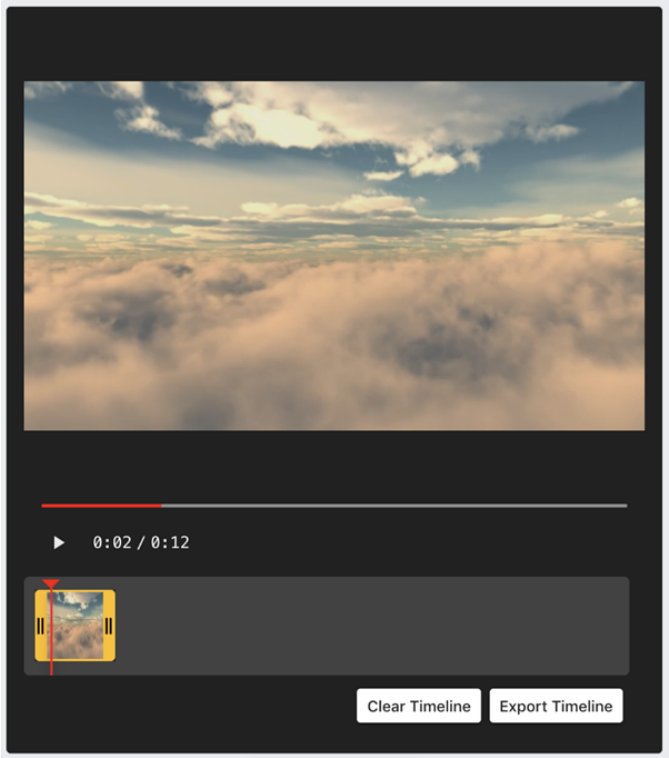
Multiple clips can be added and rearranged with drag and drop.

Each clip is be represented by set of video frames whose width is relative to the clip length, with trimming handles on the beginning and end of the clip.

The user may drag the handles to trim the in/out points for a given clip, or by clicking on the handle, the user may enter a specific in or out time respectively. To close the time entry box, click on an untrimmed part of a clip.

The timeline may be cleared by clicking the "Clear Timeline" button.

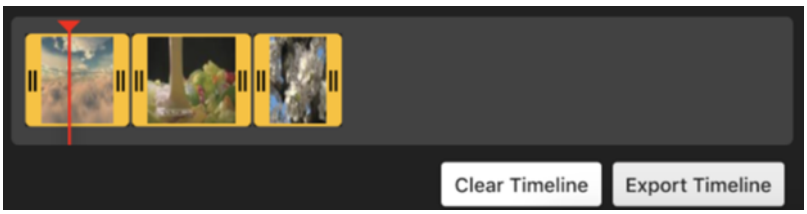
When dropped, the Video Editor View displays: the clip in the timeline, the playhead (red vertical bar and handle) and a preview above the timeline, with progress bar, a play/pause button and a current and total time indicator.



Playing Timelines

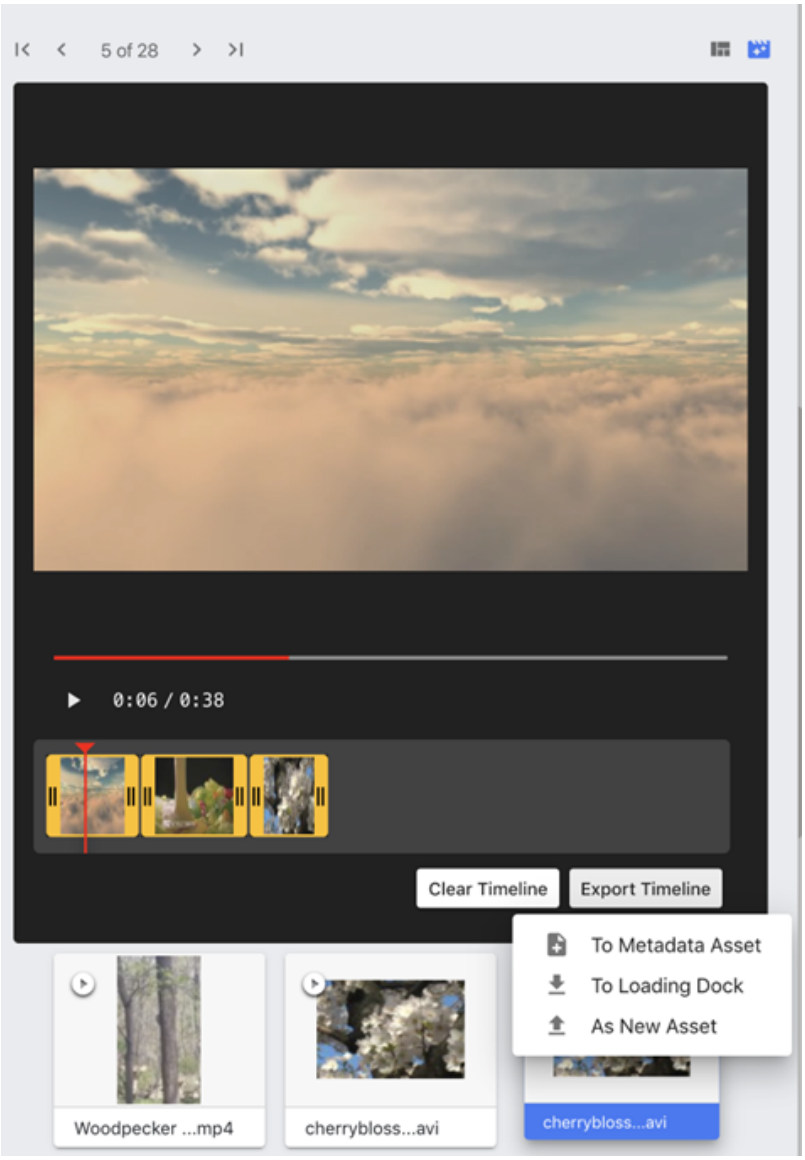
The play button will play the trimmer contents of all clips in the timeline sequence.

The time indicator and progress bar represent the combined length of all untrimmed parts of clips in the timeline, as though they were one continuous movie.



The clips on a timeline may be changed by:

- Rearranging via drag and drop.
- Trimming start/end times adjusting the yellow handles on the left and right sides.
- The clips may cleared with the “Clear Timeline” button.



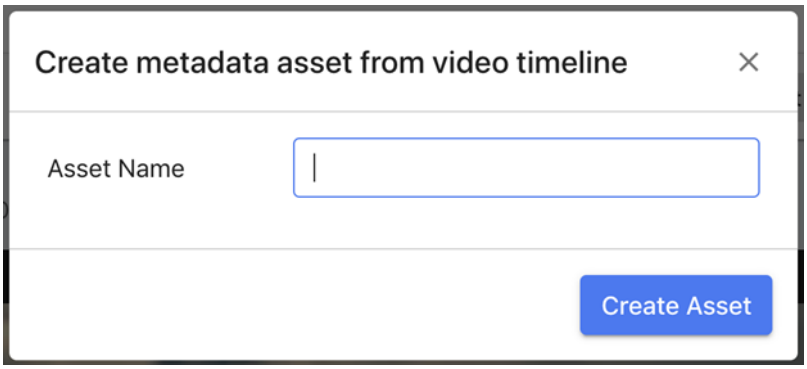
Saving and Loading Timelines

Exporting Timelines

Note: *A video conversion preset must be configured in the current Group's Loading Dock Type to use "Export Timeline".*

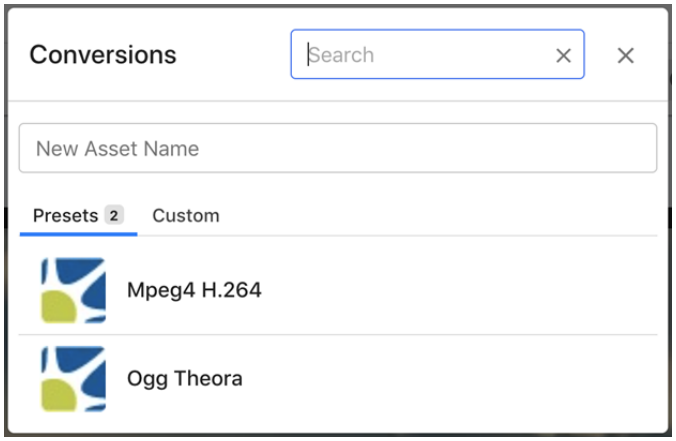
When choosing to "Export Timeline" the user has three options:

- To Metadata Asset: this will save the current timeline as a metadata only (.xmpvt) asset that records the contents of a timeline as well as clip trimming points. These assets may be used to repopulate timeline with the saved clips via dragging the .xmpvt into the timeline. Once chosen this option will display a dialog to name the new asset.

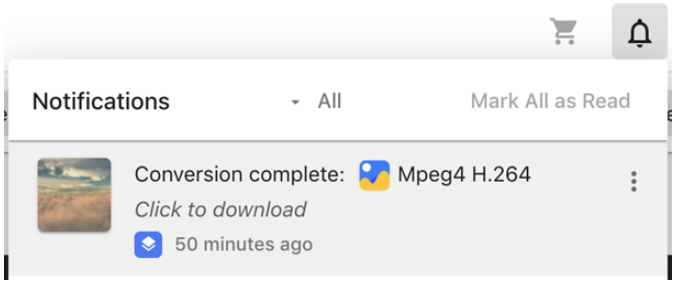


- To Loading Dock: This will download a movie file made up of the clips in the timeline.

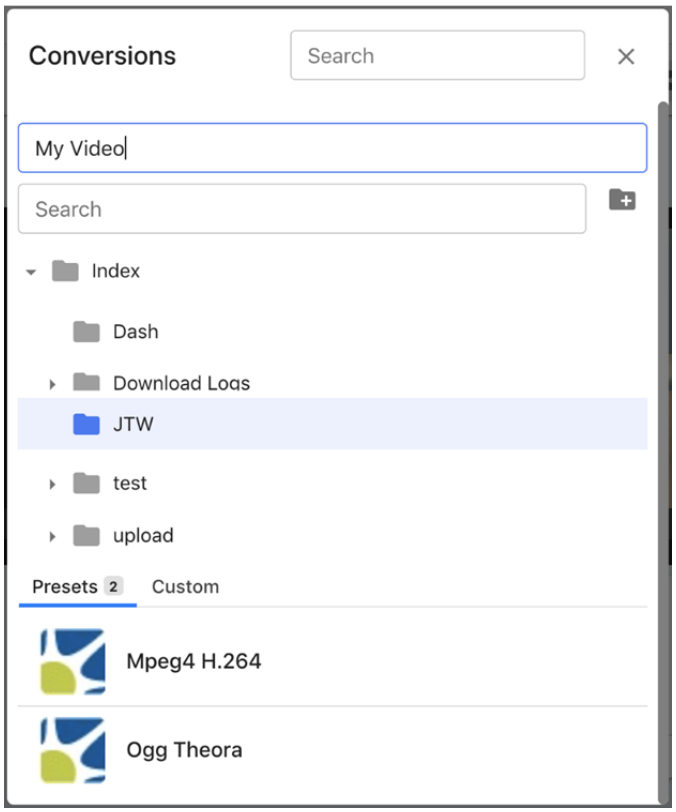
The Conversions dialog is shown, allowing the user to choose a name for the file to be downloaded and a video conversion for it.



Once complete, the video may be downloaded via the Notification Menu.

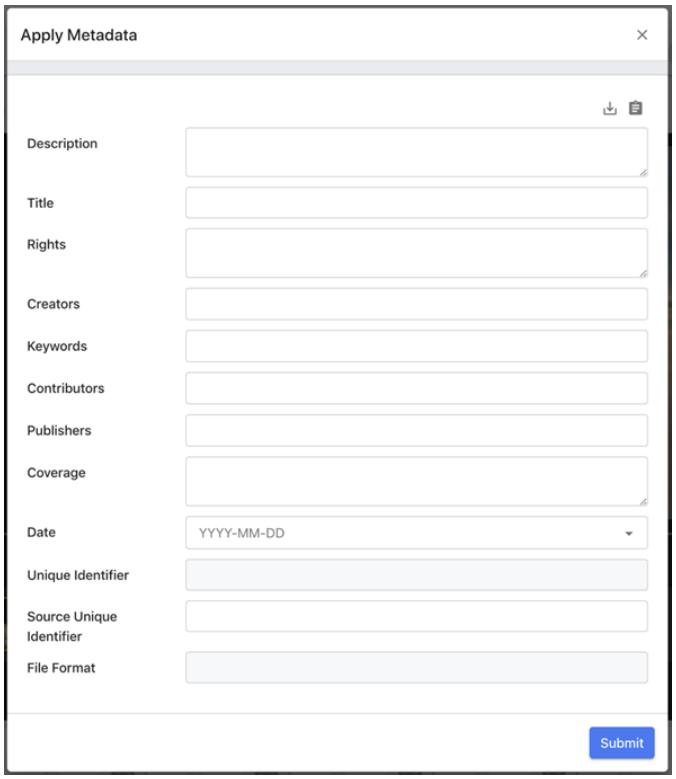


- As New Asset: When the user chooses this option, a new video asset is created inMediaBeacon. A dialog will be show to allow the user to enter a file name, choose a destination folder and a video conversion.



Upload Forms

If an Upload Form is specified in the user's ACL or the current workspace it will be presented to the user before an asset is created via Export Timeline, once the export options are is chosen.

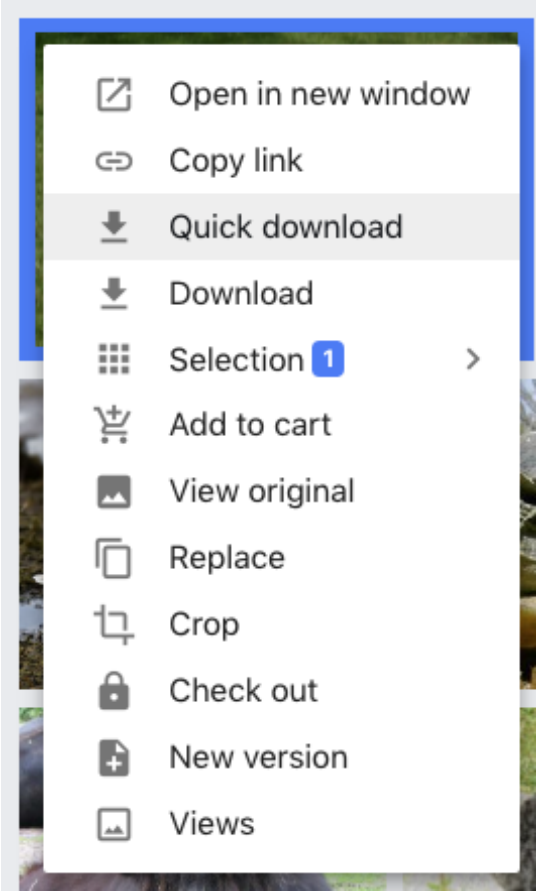


3.9. Download

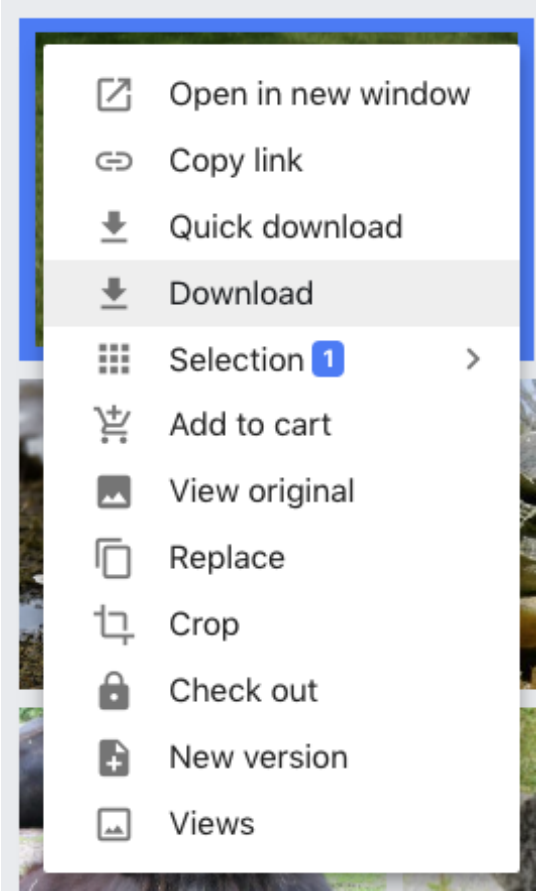
This section covers functions that involve downloading files from MediaBeacon.

An asset selection may be downloaded in a variety of ways:

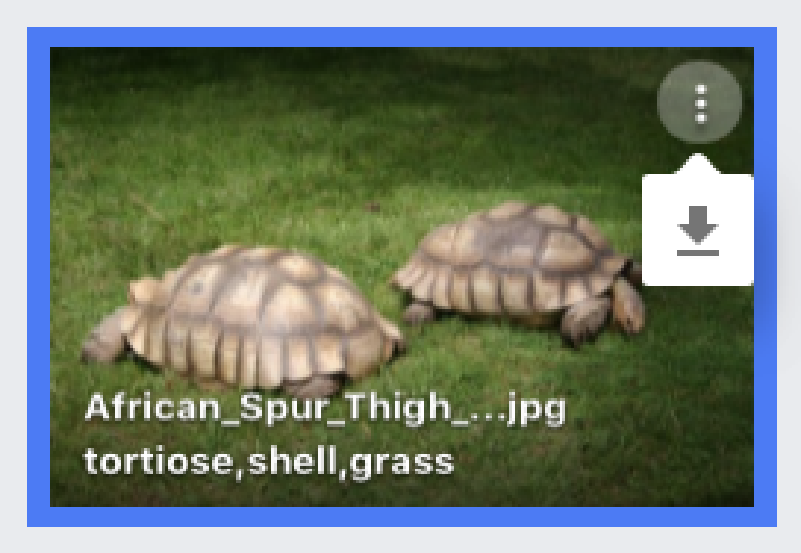
- **Quick Download** in the contextual menu: The most common form of download, also referred to as a direct download. Downloads the original of a single asset See the *[Quick Download]* section for more information



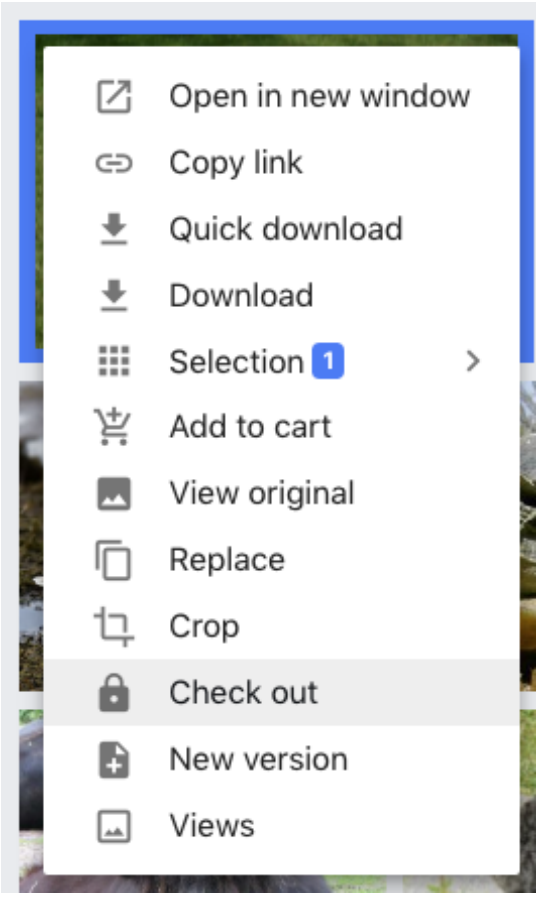
- **Download** in the contextual menu and/or the Selection sub-menu in the contextual menu: The most flexible form of download



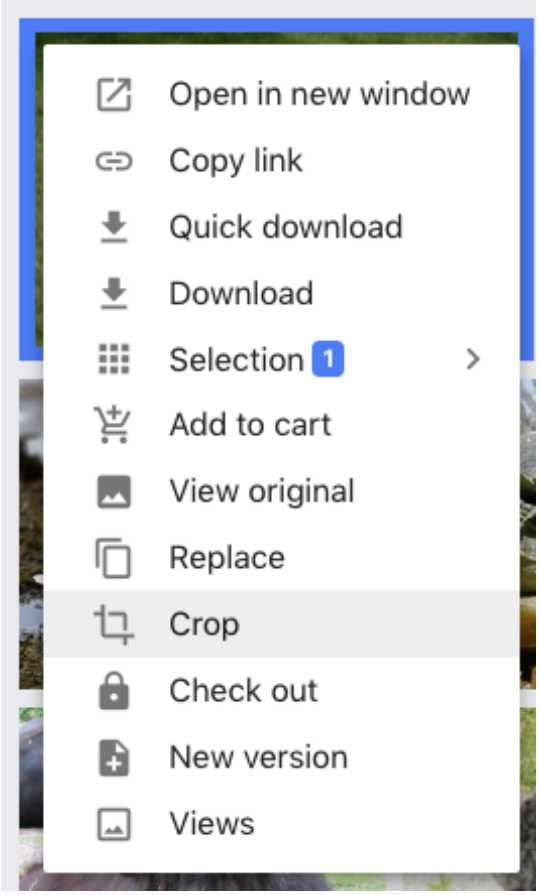
- Acts upon single or multiple assets
- May download assets in original format, use **conversion presets,** or **custom conversions**
- May immediately download assets or hold them in the **Available Conversions** area.
- See the [Download Conversions] section for function information.
- **Asset Menu**, displayed when the cursor hovers over an asset: Depending upon configuration, this menu may allow Quick Download or allow the user to select a conversion preset.



- **Check Out** in the contextual menu. See the [Check Out] section for function information.



- **Crop** in the contextual menu. See the [Crop] section for function information.



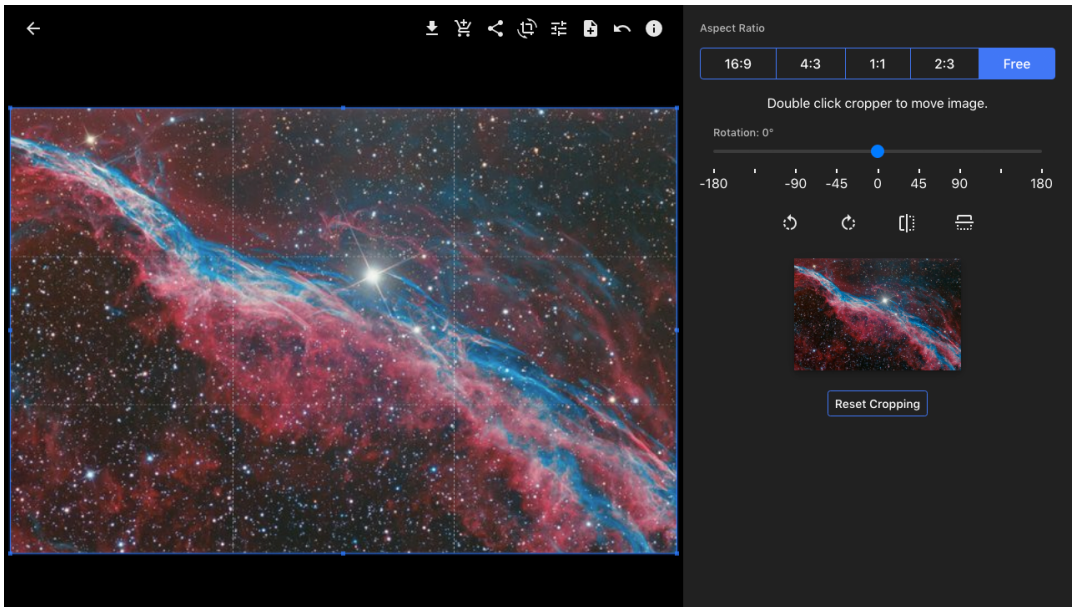
Metadata Retention

When an asset is downloaded, any XMP metadata present in the asset is included at the time of download.

3.9.1. Crop and Rotate via the Asset Info Dialog

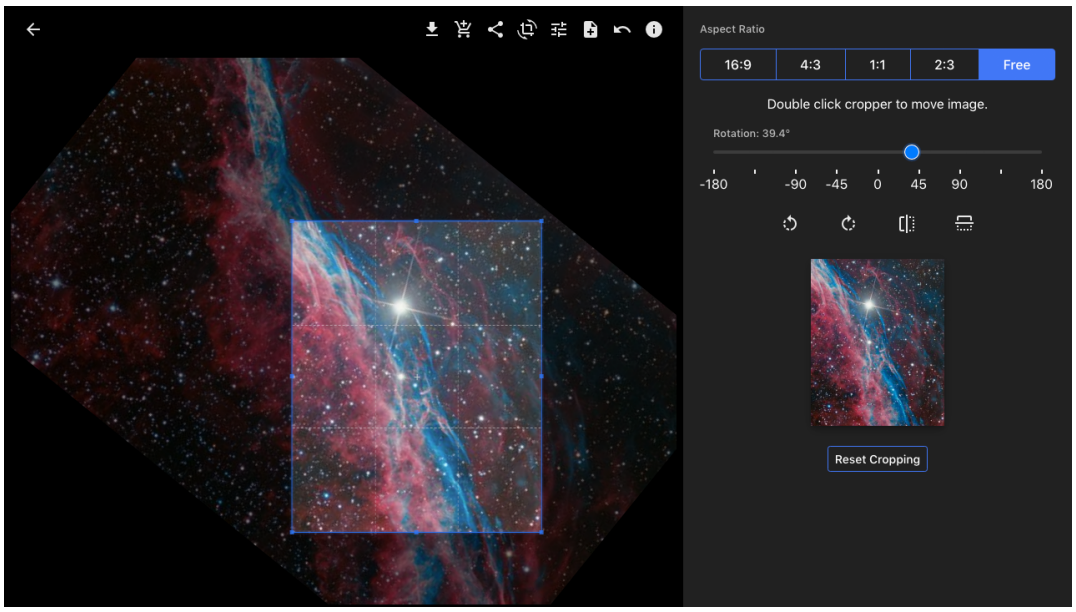
Advanced Rotate and Crop functions.

New to MediaBeacon2018.x, this feature allows the user to create a new version of an asset that is cropped or rotated. In the Asset View, the Crop and Rotate Image (located at the upper right of the left-hand frame) button opens the Crop and Rotate Image panel.



The asset preview will also show a gridded cropping box representing the crop area. It can be resized by click-dragging the corners or edges of the cropping box, and moved by click-dragging inside the box.

- Aspect Ratio Presets: These buttons lock the aspect ratio of the cropping box, or set it to "Free" having no preset aspect ratio.
    - In Free mode, shift-click-dragging a corner or side of the cropping box will retain the current aspect ratio.
- Rotation Slider and Indicator: the slide allows to user to rotate the image by an arbitrary amount clockwise or counter clockwise.

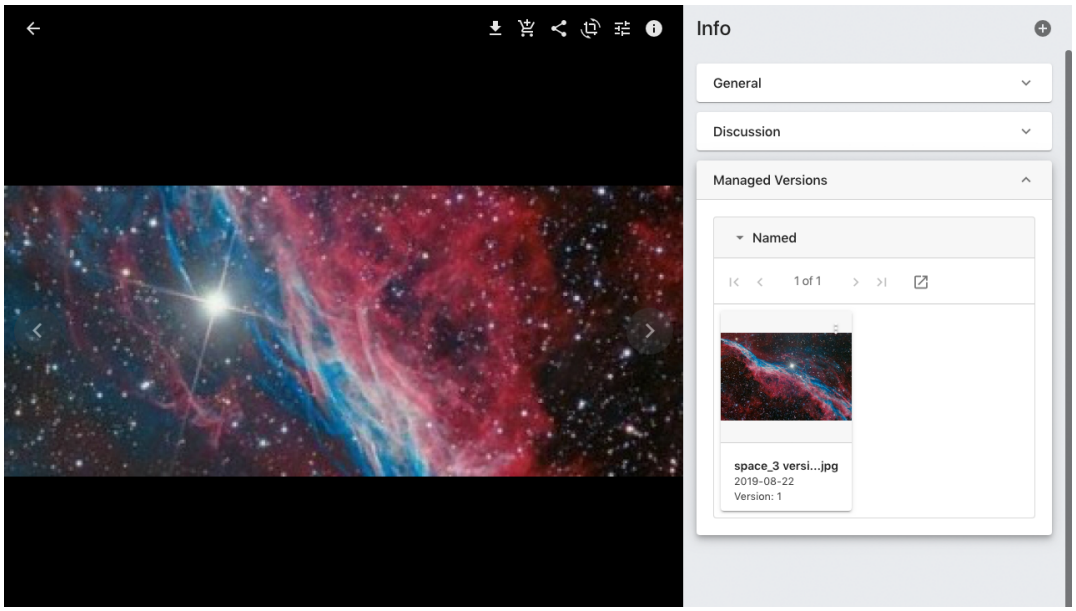


- Rotate Left: Rotates the image 90° left.

- Rotate Right: Rotates the image 90° right.
- Flip Horizontal: Mirrors the image horizontally.
- Flip Vertical: Mirrors the image vertically.
- Preview image: Displays a small preview of the cropped image.
- Revert Changes: The Revert Changes button (located at the upper right of the left-hand frame) will revert the image to its original state.

Creating a New Version

Once the user has made the settings they desire for a new version, they may click the New Version button (located at the upper right of the left-hand frame) to create a new version, which may be viewed under the "Managed Versions" Form tab.



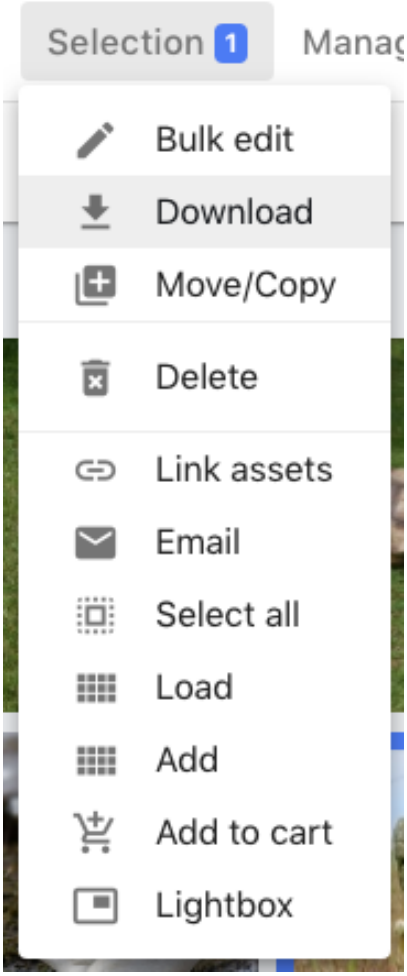
3.9.2. Download Conversions

The "Download" command allows users to download multiple assets at once, and optionally, to apply a conversion to those assets.

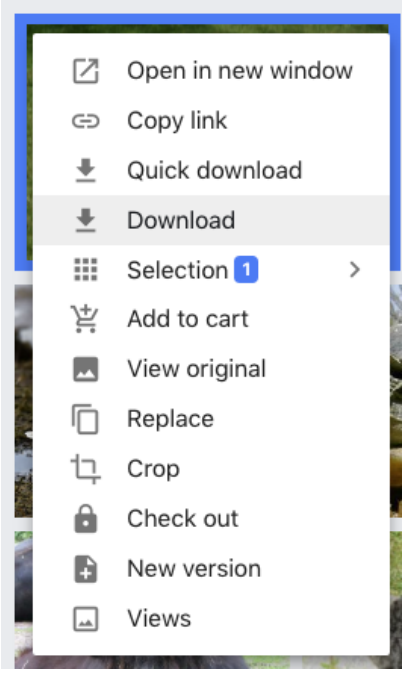
Starting a Download

The command can be chosen in several different places in the interface, with some variation in function:

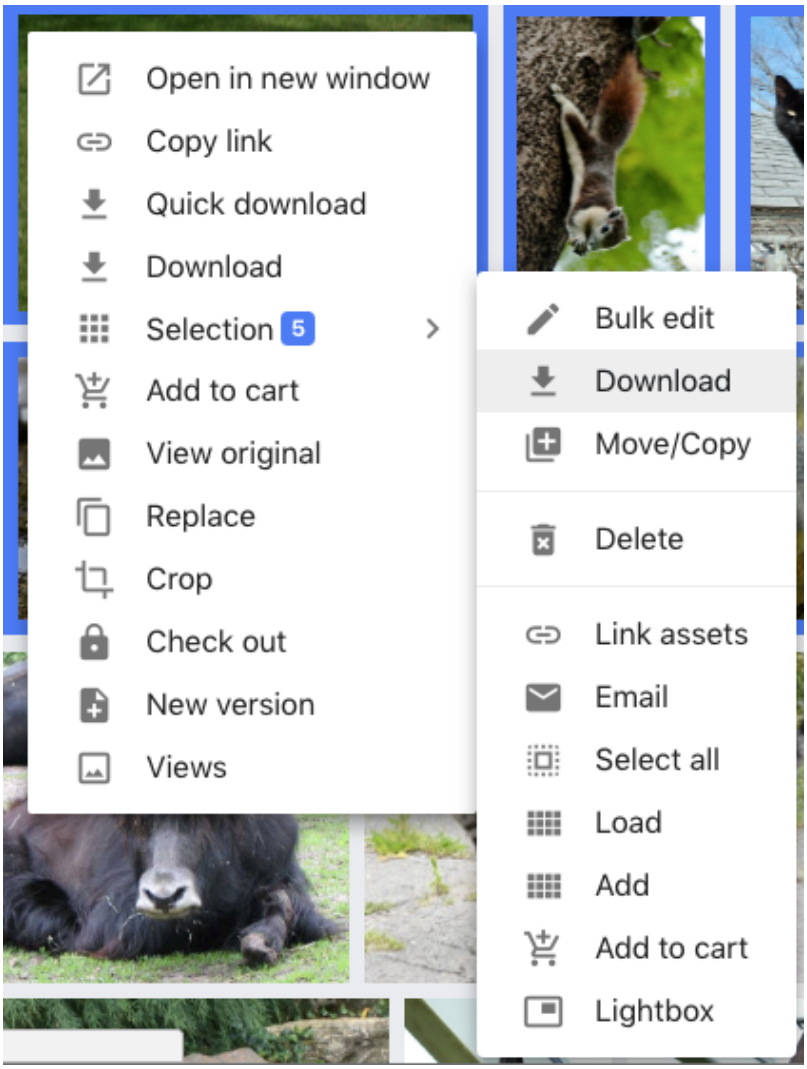
- Selection menu (when an asset selection has been made)
  - Downloads all assets in the selection.



- The contextual menu
  - Downloads only the asset that was right-clicked upon, regardless of the current asst selection



- The contextual menu's "Selection" sub menu
  - Downloads all assets in the selection



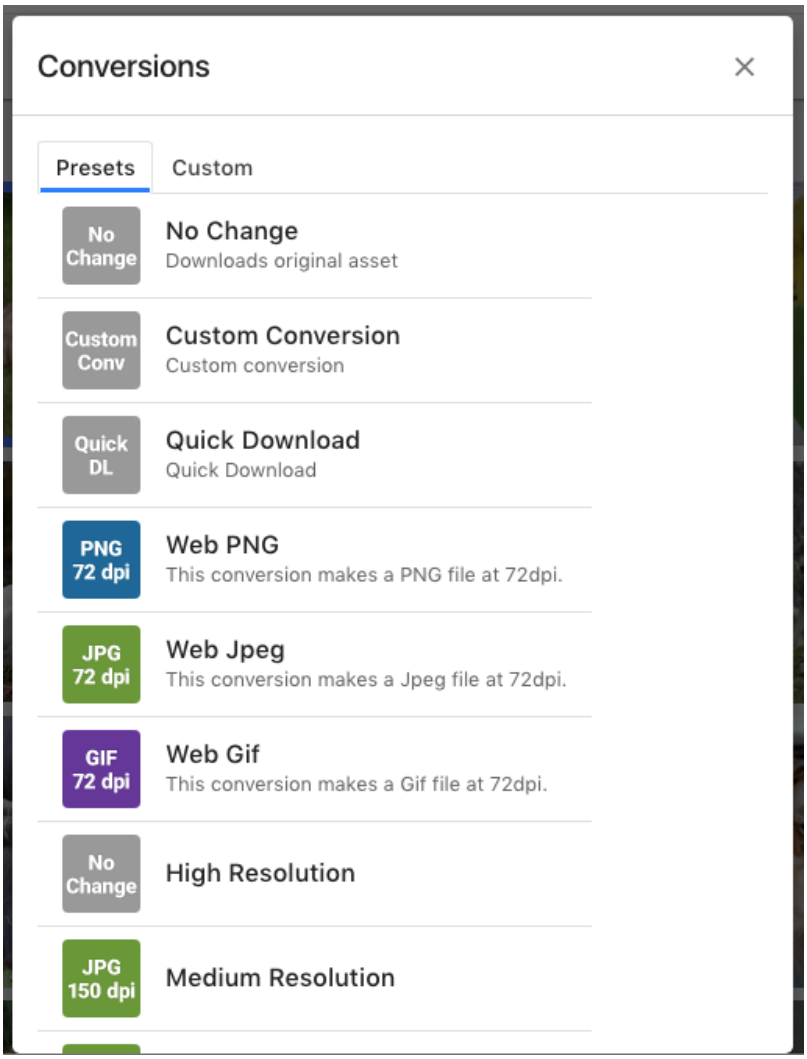
In any of these cases, the Conversion dialog will be displayed, to allow the user to choose a **conversion preset** or to perform a **custom conversion.**

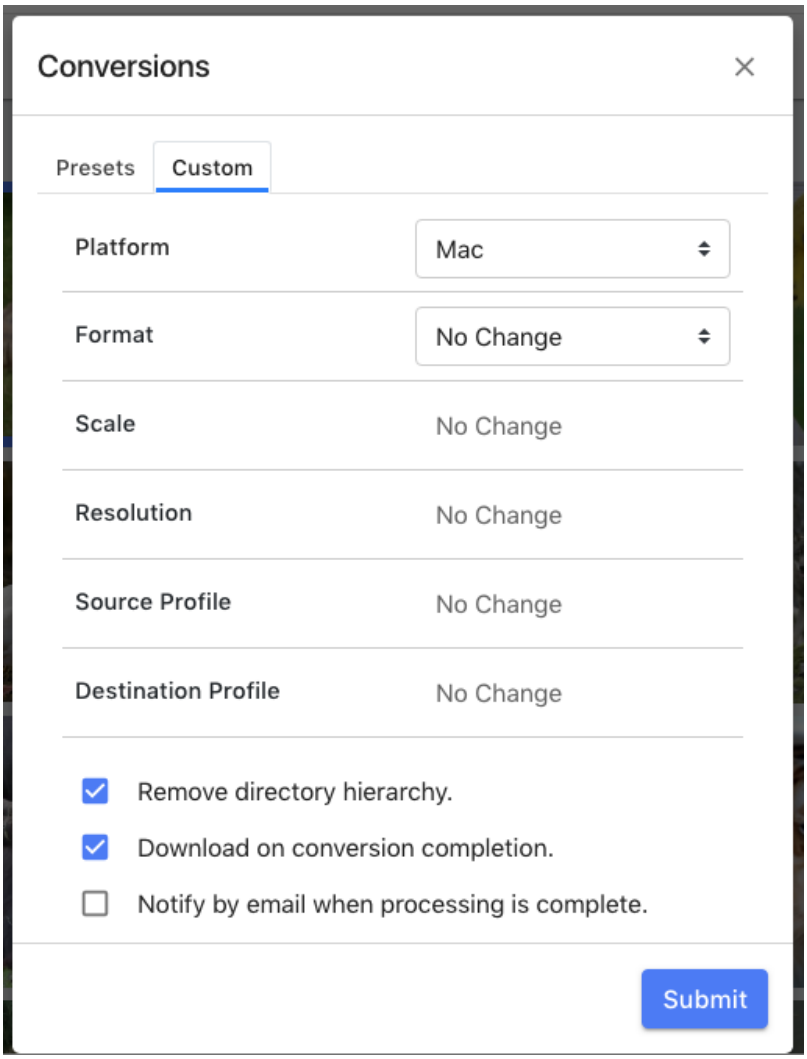
What are Conversions?

Conversions are copies of assets that are changed from their original format to another in the process of downloading them. These conversions are not permanently retained by MediaBeacon, so are best not thought of as "renditions".

Conversions may alter file parameters such as: file format, size, dpi, and color mode (RGB, Grayscale, CMYK)

Using the Conversions Dialog


Conversions
Presets
Custom
No Change
No Change
Downloads original asset
Custom Conv
Custom Conversion
Custom conversion
Quick DL
Quick Download
Quick Download
PNG 72 dpi
Web PNG
This conversion makes a PNG file at 72dpi.
JPG 72 dpi
Web Jpeg
This conversion makes a Jpeg file at 72dpi.
GIF 72 dpi
Web Gif
This conversion makes a Gif file at 72dpi.
No Change
High Resolution
JPG 150 dpi
Medium Resolution



- Presets Tab: Each row in this tab represents a predefined set of parameters into which the assets will be converted.
  - Various qualities of the asset may be changed, such as file type, color mode, scaling, rotation, resolution setting, and color conversion.
  - It is typical that there is a "No Conversion" (or similar name) preset. This downloads the original in the same manner as quick download.

- Custom Tab: This tab allows the user to choose the specific parameters desired for a conversion.
  - Various qualities of the asset may be changed, such as file type, color mode, scaling, resolution setting, and color conversion.
  - This section may be hidden from users, unless the user's role requires download of assets in arbitrary combinations of parameters.
  - "Remove directory hierarchy": when turned off, the folder structure the asset exists in within the MediaBeacon system will be included the download.
  - "Download on conversion completion": Allows the download to immediately proceed once processed, otherwise, the asset will be held in the **available conversions** area, see below. Note that if the browser window is closed, the download will not proceed until the user logs back in

- "Notify by email when processing is complete": Sends an email to inform the user a download has completed.

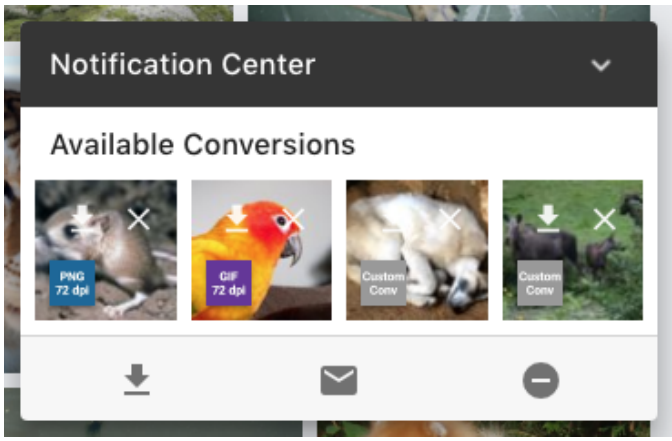
Once a conversion preset or custom conversion has been chosen, the asset conversion progress will be shown in the notification center, and either downloaded immediately, or sent to the **available conversions area**, depending upon options chosen above.

Note:

Keep in mind that conversion presets and custom conversion are installation-specific, so the list of available conversions or other options may differ in any given instance.

Conversions Items

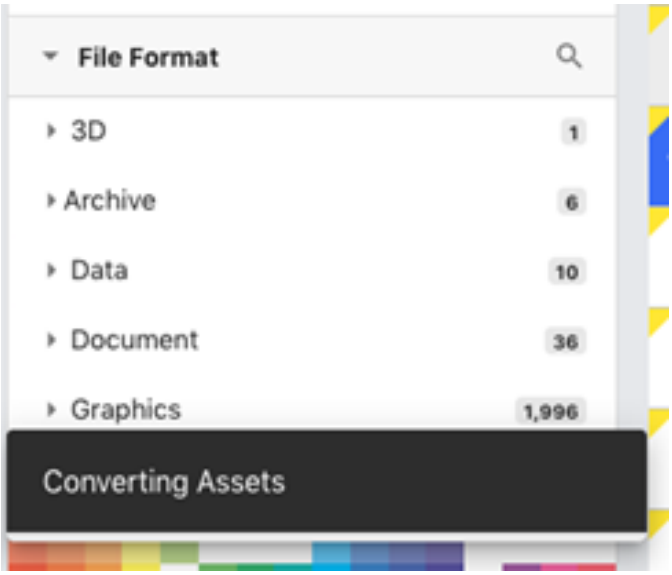
This area (formerly called the "Loading Dock"), is displayed when there are converted assets that are waiting to be downloaded.



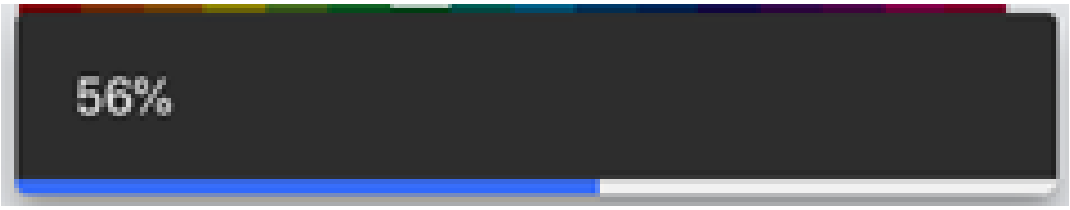
- Conversions: Icons listed here represent conversions of assets that are ready to be downloaded. Each conversion has several individual controls that pertain only to that asset
  - Download: Downloads just this conversion.
  - Delete: Deletes just this conversion.
  - Conversion Identifier Badge: Shows what preset (or that custom conversion) was used to create the conversion.
- Download All: Downloads all conversions.
- Email All: Sends the converted assets to a list of recipients. The full assets are attached, so users will need to be sure this does not exceed the maximum email attachment size.
- Delete All: Deletes all conversions.

Toast for Downloads

When a user performs a Download with a Conversion, a “Converting Assets” toast message will be shown in the bottom left of the Web UI. This is a change from the conversion being seen in the “Available Conversions” (Loading Dock) on the bottom right as previous versions did.



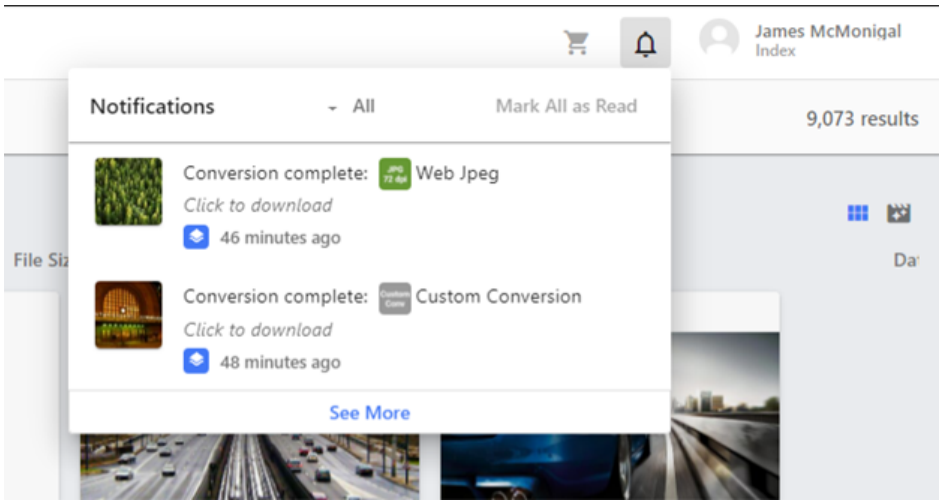
For larger assets, conversions will show a progress bar.



Once the Conversion has been created, two methods of feedback will be shown to the user:

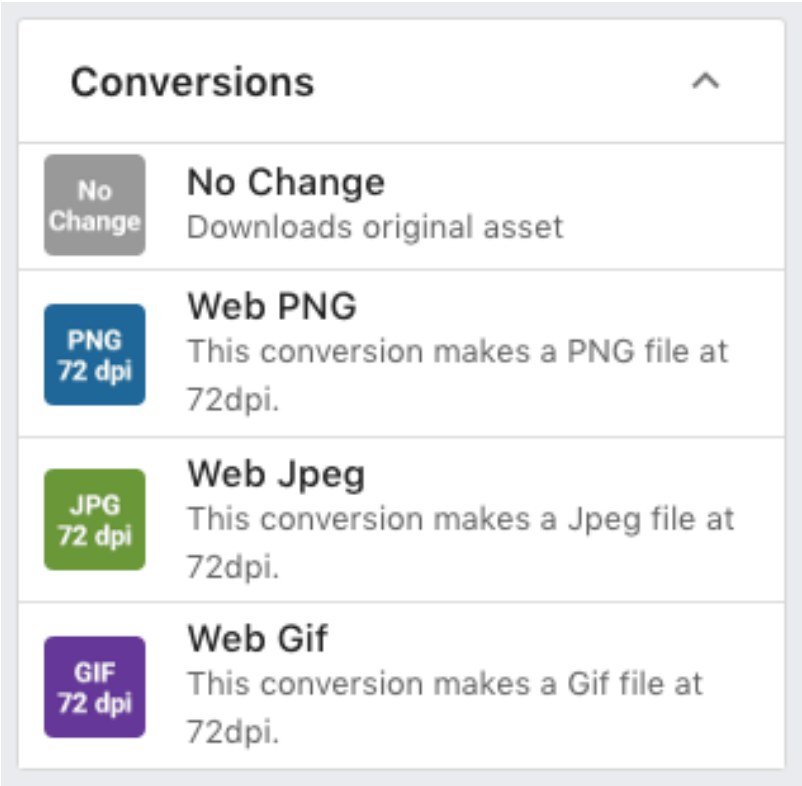
- A “Conversion complete” toast message will be shown for 15 seconds.

- The completed conversion is shown as a “Conversion complete” notification.



To complete the download, either the toast or notification may be clicked to download the converted asset.

Conversions Component



The Conversions component displays all or a subset of the available conversions seen in the Conversions Preset Tab. Clicking a conversion or dragging an asset selection to a Conversion will trigger the conversion to begin.

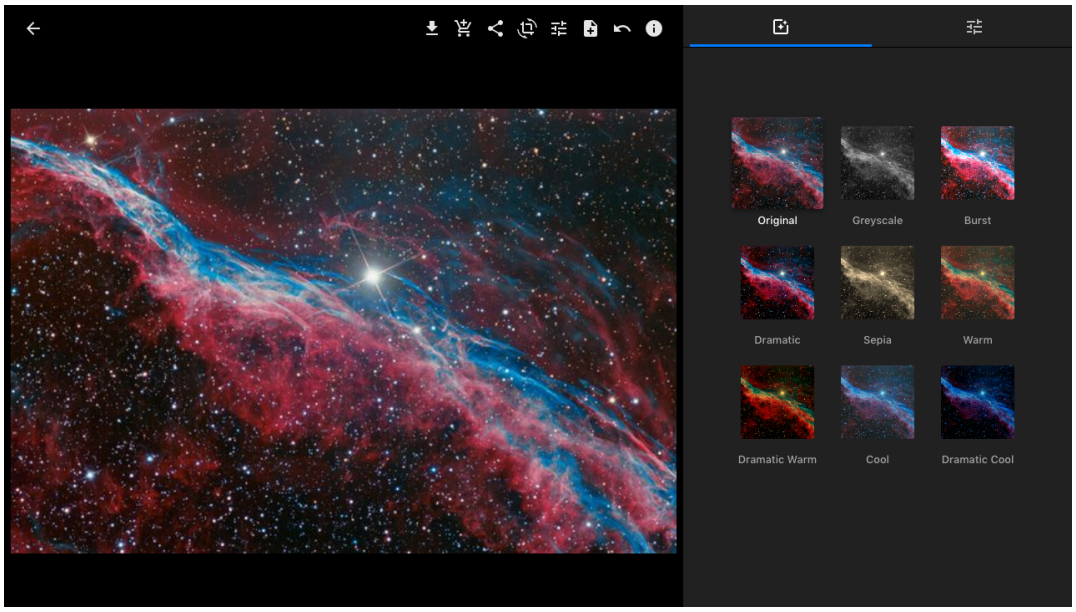
Again, depending upon the preset configuration, this may cause a download to commence when the conversion is complete, or send the conversion to the Notification Center Available Conversions area.

3.9.3. Image Color Adjustment via the Asset Info Dialog

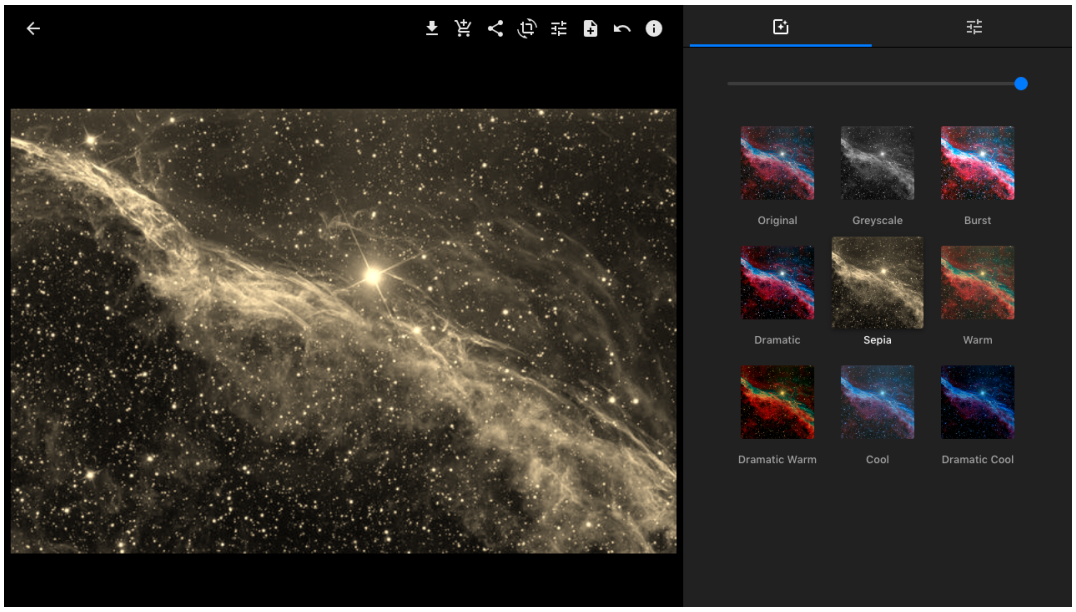
Color adjustment functions in MediaBeacon

This feature allows the user to create a new version of an asset that has been color-adjusted. Clicking the Edit Color button (located at the upper right of the left-hand frame) opens the color adjustment panel.

The user may choose to edit color in two tabs in the right-hand panel; Color Filters and Basic Adjustments, respectively (active tab is underlined in blue).

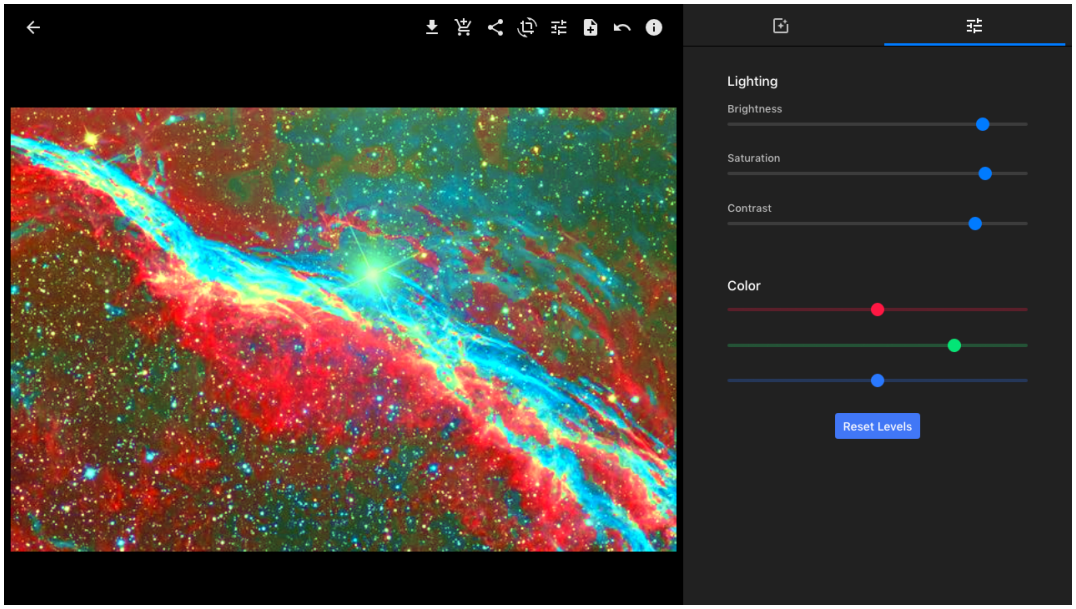


Color Filters Tab



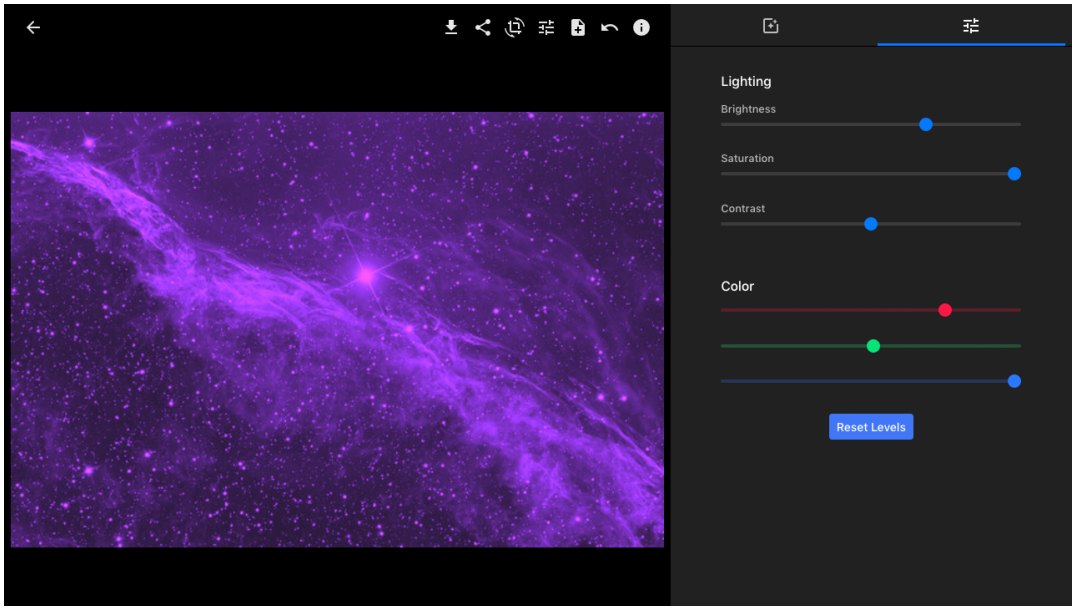
- This tab shows a list of 9 basic filters, along with a small preview of what the asset will look like when each is chosen.
- A slider above the presets allows the user to blend the original image with the filter; 0% at the left and 100% at the right.

Basic Adjustments Tab



- This tab displays adjustment sliders for Brightness, Saturation and Contrast, as well as Red, Blue and Green color sliders
- Combining Color Effects: The effects of the Color Filter and basic Adjustments can be combined

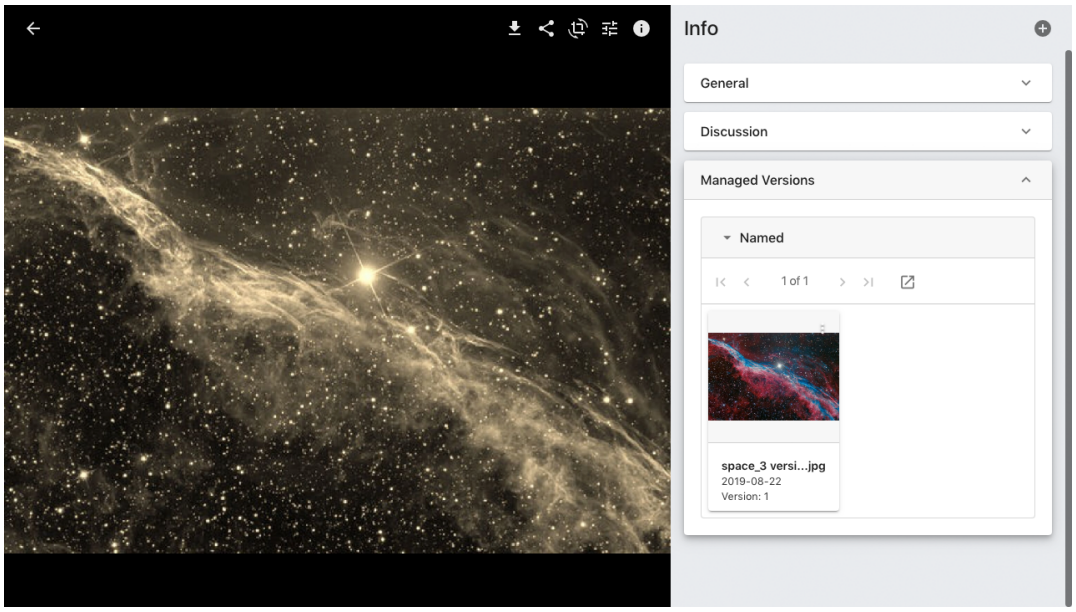
- For example, using the Grey scale preset in the Color Filters tab, and then stitching to the Basic Adjustments tab to add a purple tint.



- Comparison View: When changes have been made to the color settings of either tab, the user may click the asset preview to see the original image. The message "Click and Hold to Compare" is displayed below the asset.
- Revert Changes: The Revert Changes button (located at the upper right of the left-hand frame) will revert the image to its original state.

Creating a New Version

Once the user has made the settings they desire for a new version, they may click the New Version button (located at the upper right of the left-hand frame) to create a new version, which may be viewed under the "Managed Versions" Form tab.

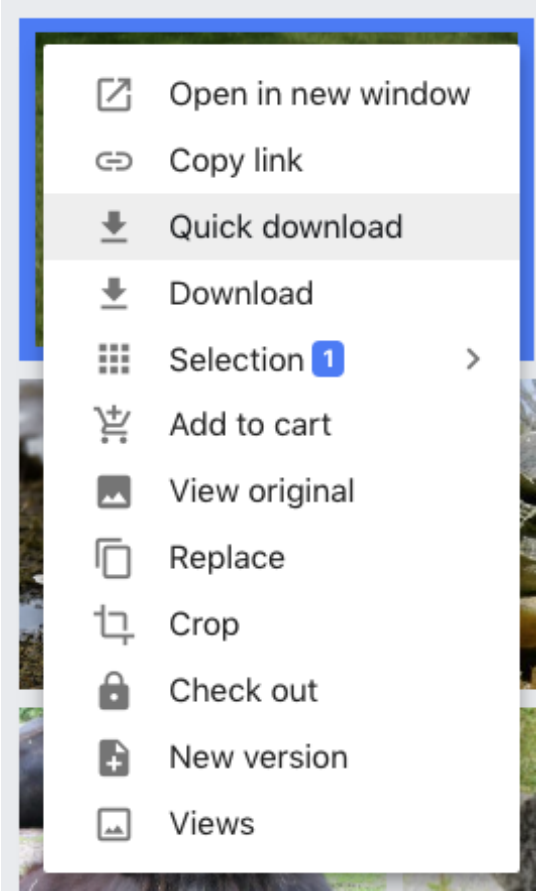


3.9.4. Quick Download

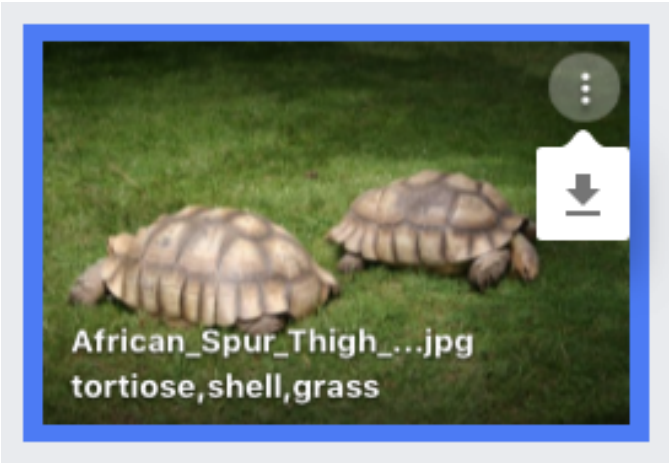
The Quick Download function downloads a single asset in its originally-uploaded format.

It can be triggered in the following places:

- View component contextual menu



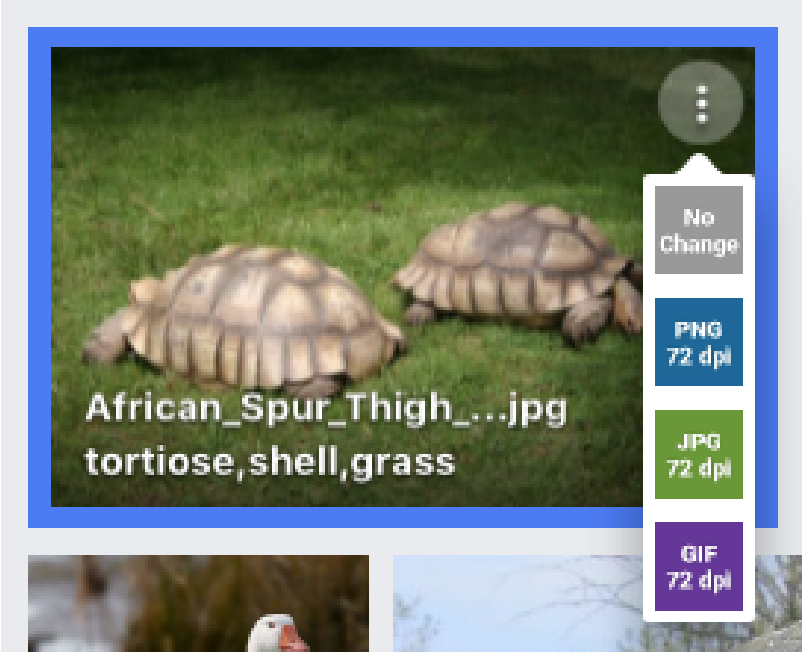
- Asset Action menu, a menu visible in the Infinite Scroll and Tile views. It is visible in the upper right of an asset it's hovered over.



Optional Configuration

- MediaBeacon is configured to download assets in a ZIP archive by default. This behavior may be changed to automatically decompress, and remove the ZIP file.

- The Asset menu may display one or more **conversion presets**, instead of the Quick Download command. The function of these will depend upon the configuration of your MediaBeacon instance.



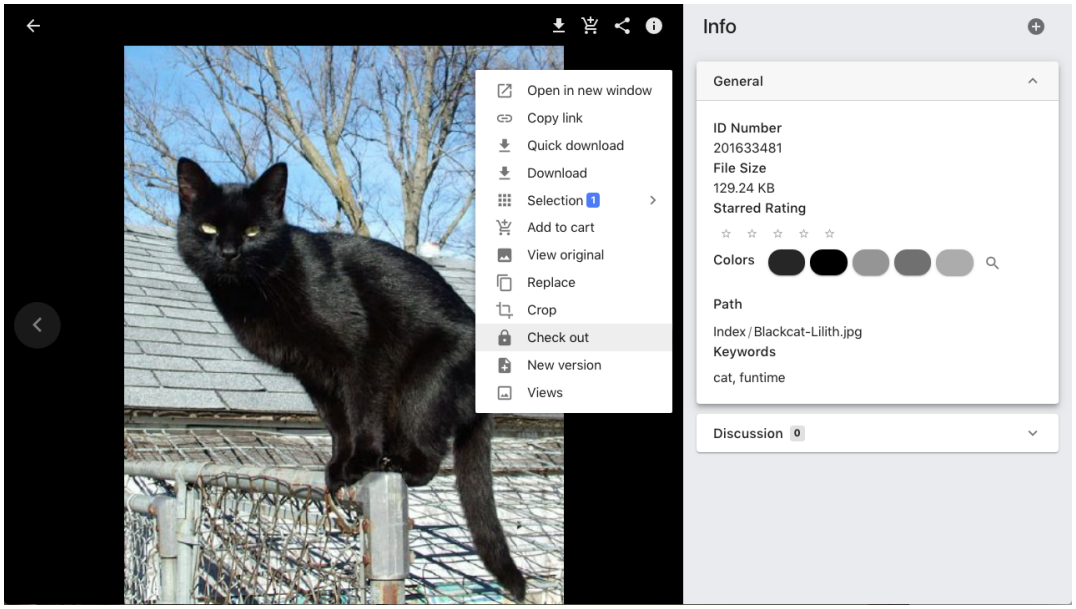
3.10. Upload

This section covers uploading functions in MediaBeacon

3.10.1. Check Out

Similar to the Version function, but allowing assets to be locked until a new version can be uploaded.

When the Check Out contextual menu command is performed on an asset, it is immediately Quick Downloaded and Checked Out. This is done to prevent other users from altering a file while it's being altered.

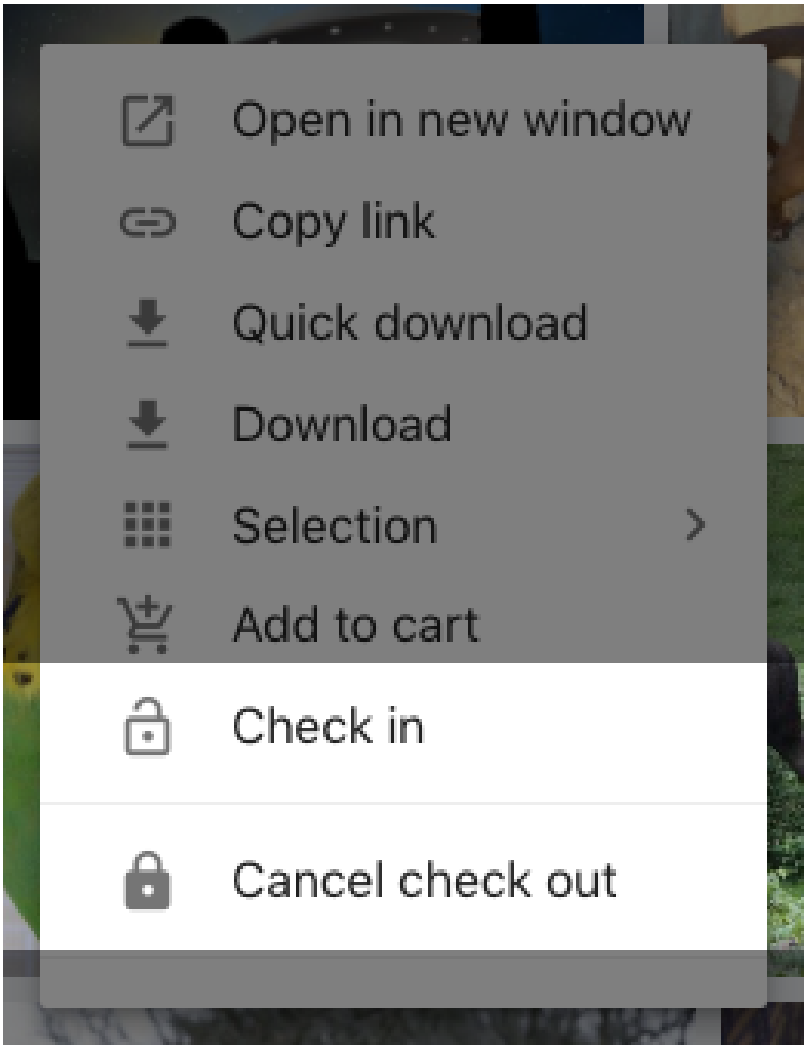


Note:

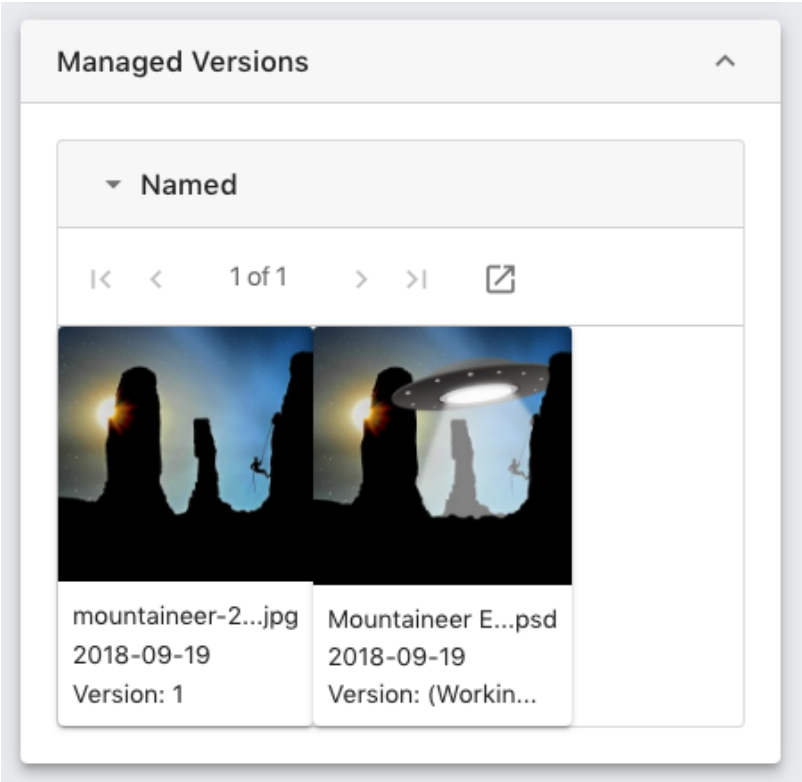
Note that Check Out, or any other contextual menu command may be performed by right clicking on the asset preview, either in the view component or the asset view.

An asset that is "checked out" cannot be moved to another location, copied, renamed, or have any alteration to its metadata. This status changes several aspects of the asset

- The contextual menu will be altered to include "Check in" and "Cancel Check out", see below.

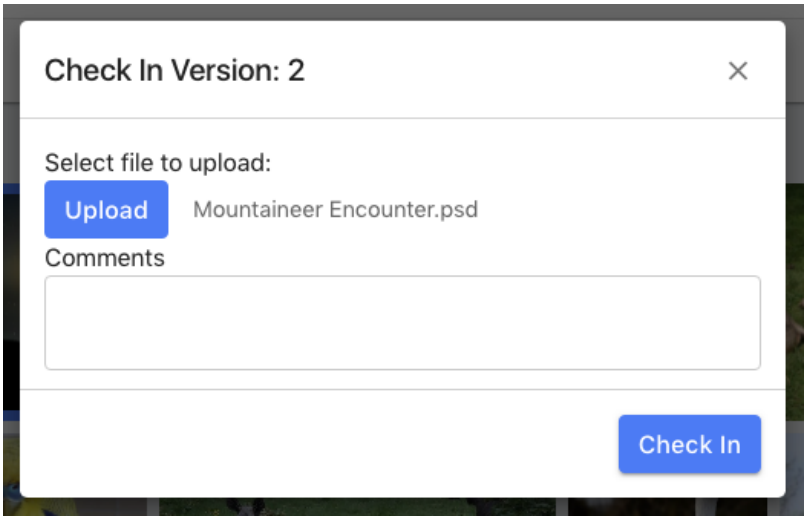


- In the Managed Version Form tab, a new version is listed as "Working Copy". This is a placeholder version until the newer one is checked in.



Checked Out Asset Contextual Menu

- **Downloading:** A checked out asset cannot be downloaded by users, other than the user that checked it out, who can download it again if needed.
- **Check In:** Only available to the original checkout user, this command opens the Check In dialog. It allows the user to upload a new versions.



- This will automatically rename the asset to the uploaded file's name, however the original metadata is retained.

- **Cancel Check Out:** This command will unlock the asset, no new version of the asset is created.

Note: An administrator may also be able to cancel a check out or check in a version.

Note: The Version function is similar to Check Out, and usually only one of the two functions are used in any given installation.

3.10.2. Duplicate Detection

Note:

This function is included inMediaBeacon 2019.1+

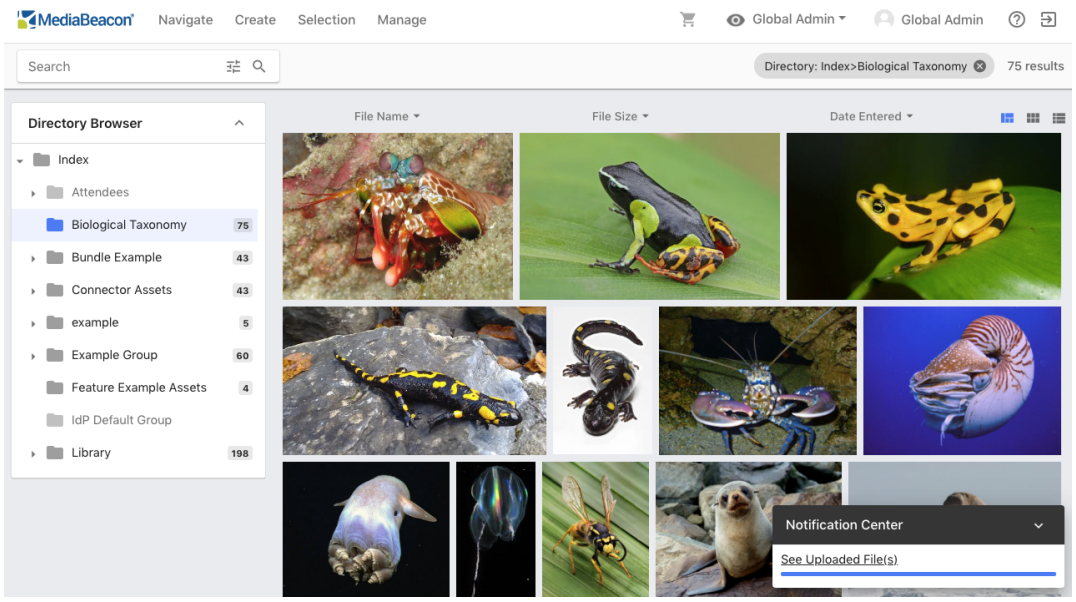
The duplicate detection system is designed to alert users when exact copies of an asset is uploaded. When an asset is uploaded, a "hash code" is generated from the asset preview. If this code matches another asset or assets, a duplicate detection notification will be generated. Note that matches are not made for non-current versions.

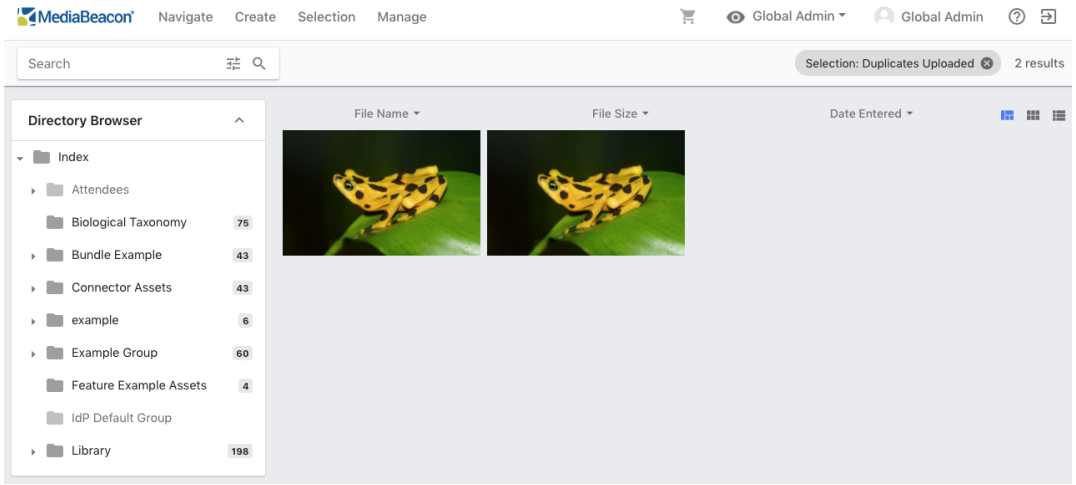
Implementation in 2019.1

In MediaBeacon 2019.2, messages generated by this system are displayed in the Notification Center, and in the Saved Selections dialog.

Notification Center

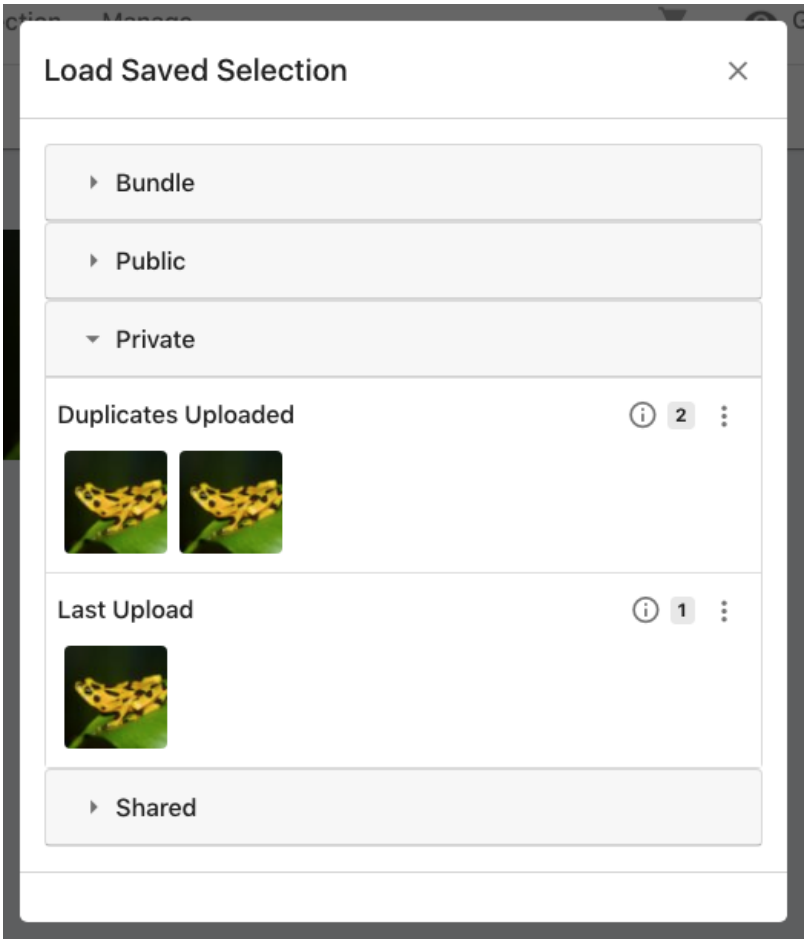
When a duplicate is uploaded, a notification for the duplicate detection event is displayed. Clicking the link will display just those assets as the current view.





Saved Selections Dialog

To see individual sets of found duplicates, choose "Load Selection" under the Selection menu, displaying the Load Saved Selections dialog. Each entry represents all assets found to be duplicates during each upload event. Clicking a "Duplicates Uploaded" entry will display just those assets as the current view.

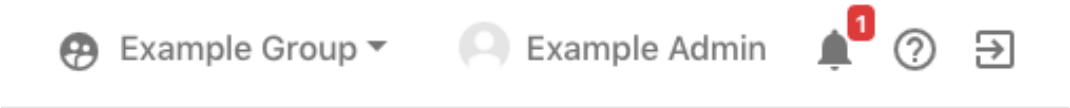


Implementation in 2019.2

In MediaBeacon2019.2, messages generated by this system are displayed in the Notification Icon, Notification Menu, Notification Dialog, and in the Saved Selections dialog.

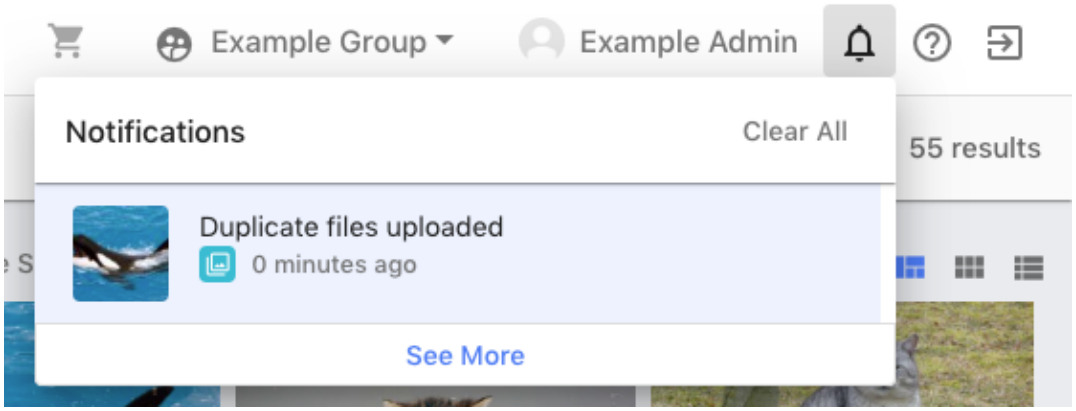
Notification Icon

When a duplicate is uploaded, a notification for each duplicate detection event is displayed.



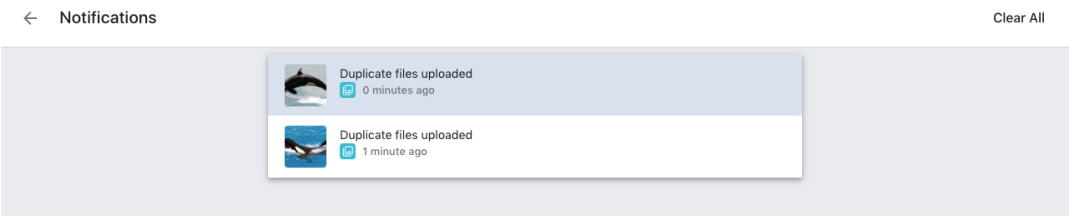
Notification Menu

Notification messages here show more detail, showing an asset preview icon, and a time indicator.



Notification Dialog

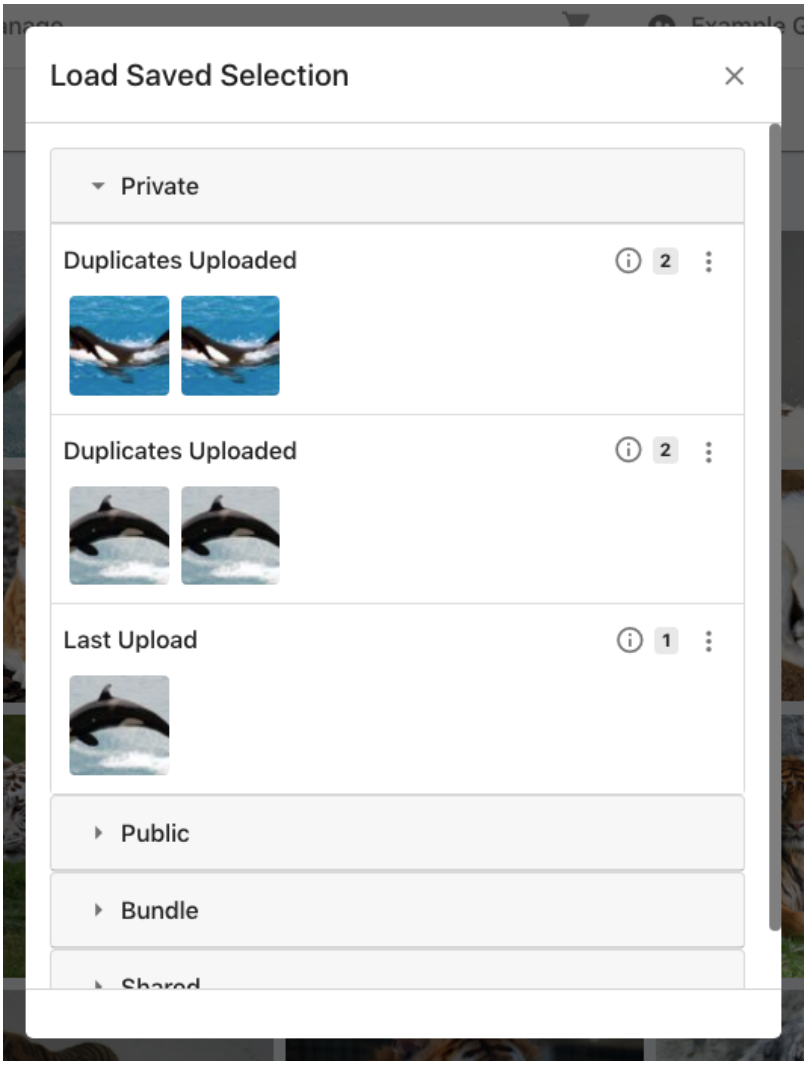
Clicking "See More" will show all notifications in a dialog.

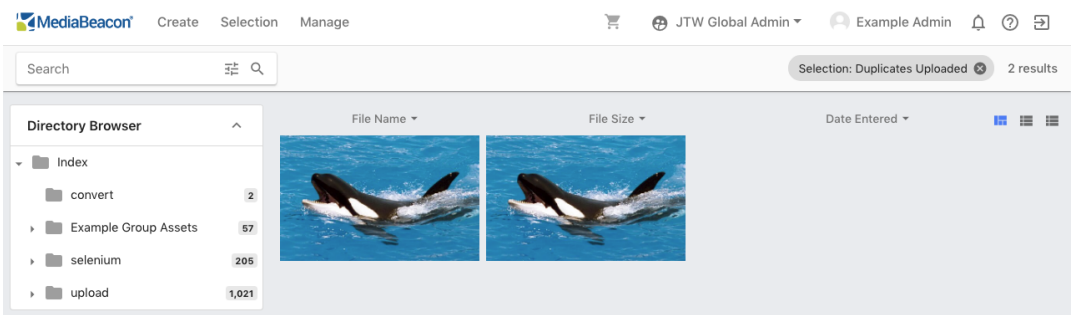


Private Saved Selections

To see individual sets of found duplicates, choose "Load Selection" under the Selection menu, displaying the Load Saved Selections dialog. Each entry represents all assets found to be duplicates

during each upload event. Clicking a "Duplicates Uploaded" entry will display just those assets as the current view.

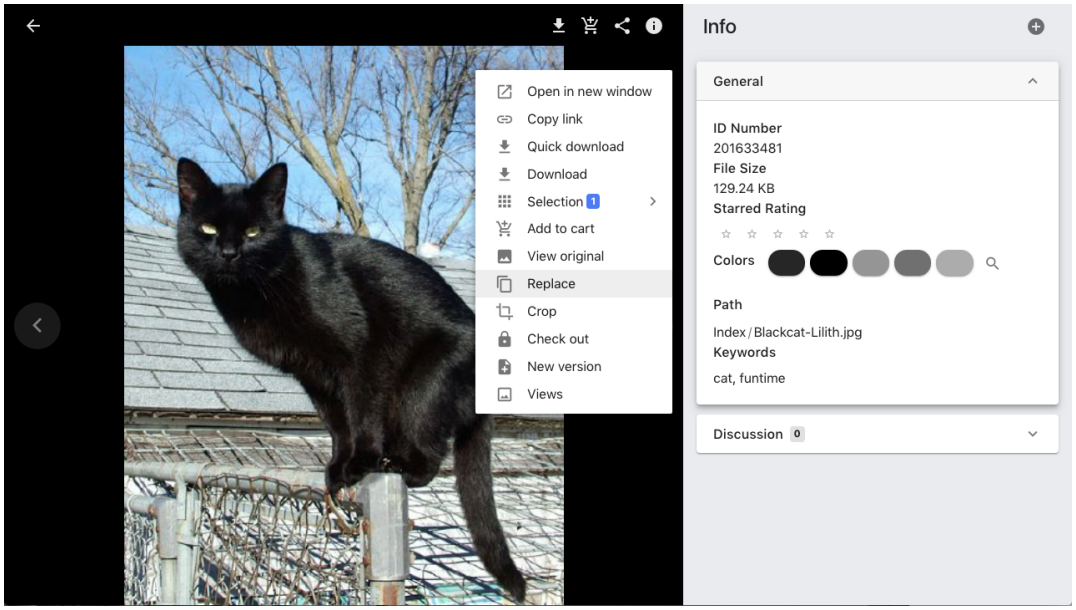


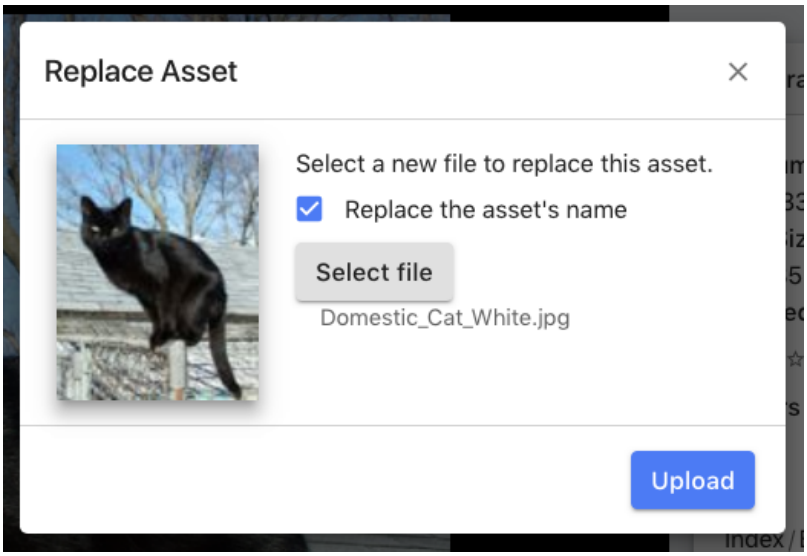


3.10.3. Replace

Allows users to replace the file portion of an asset without making a version.

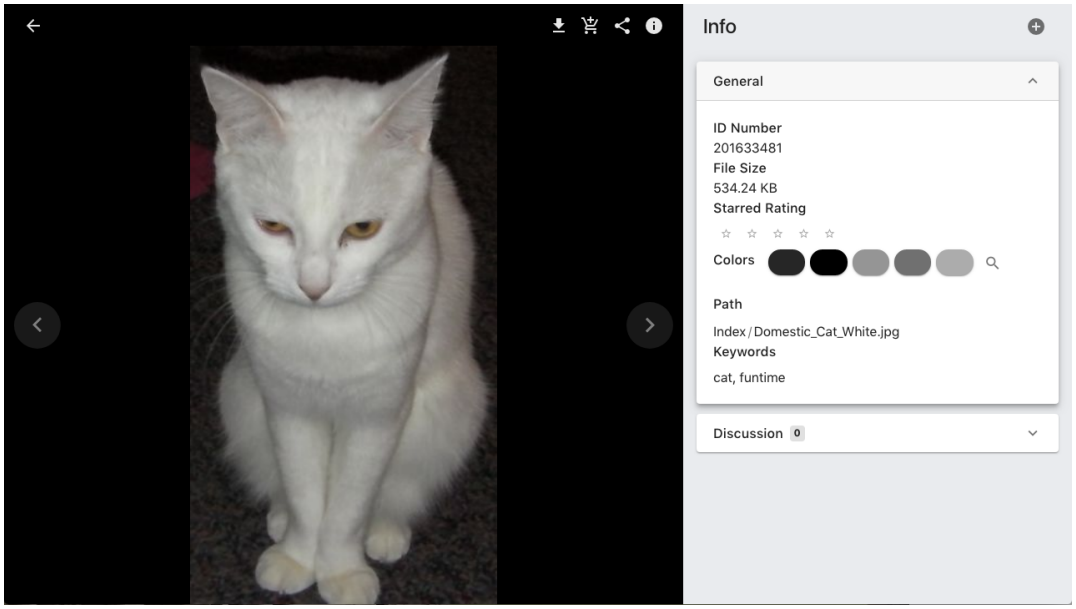
Note: The Replace function is not included in MediaBeacon2019.2+





The Replace command is similar to both Versioning and Check Out, with the following exceptions:

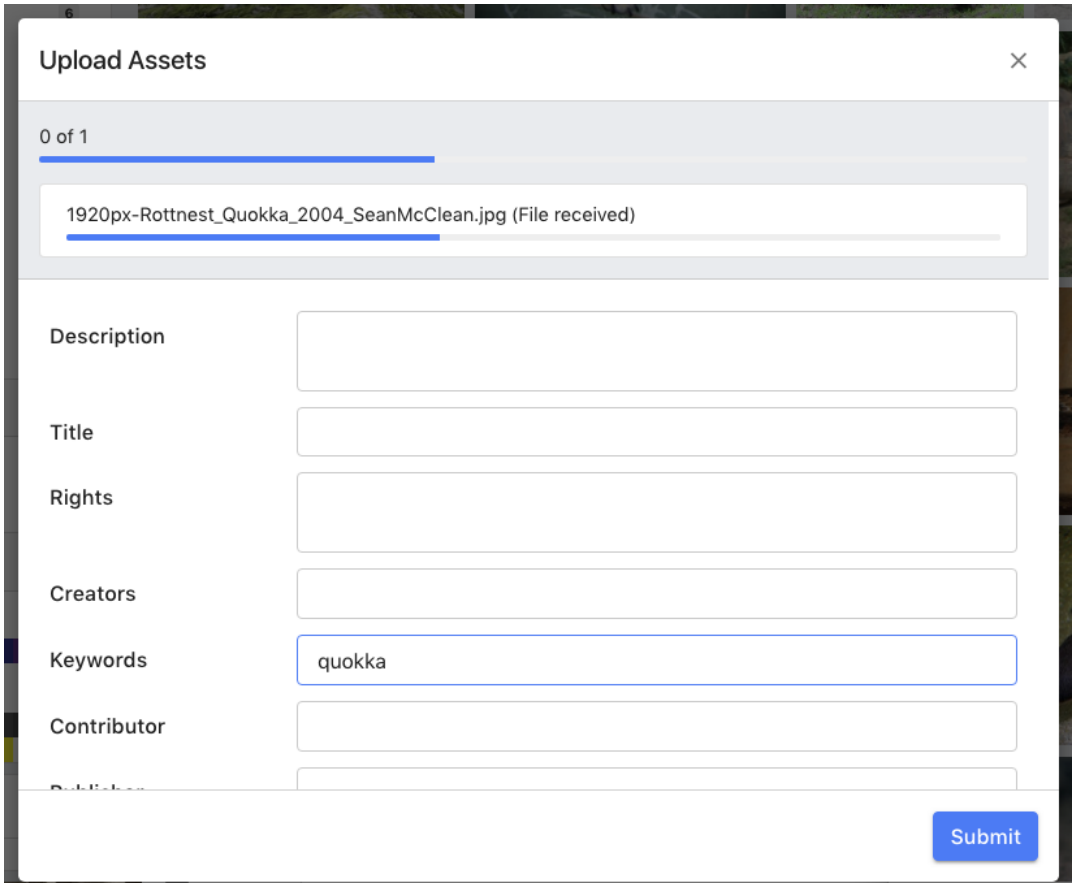
- It does not create a version, the "file" aspect of the asset is permanently replaced, with the metadata being retained.
- It optionally replaces the asset's name, but other metadata is retained, notably the Asset ID.
- It does not lock the asset.



Because no older version is retained, this function is usually reserved for administrators.

3.10.4. Upload Forms

Upload forms are a keystone of the metadata entry and searching life cycle in MediaBeacon.

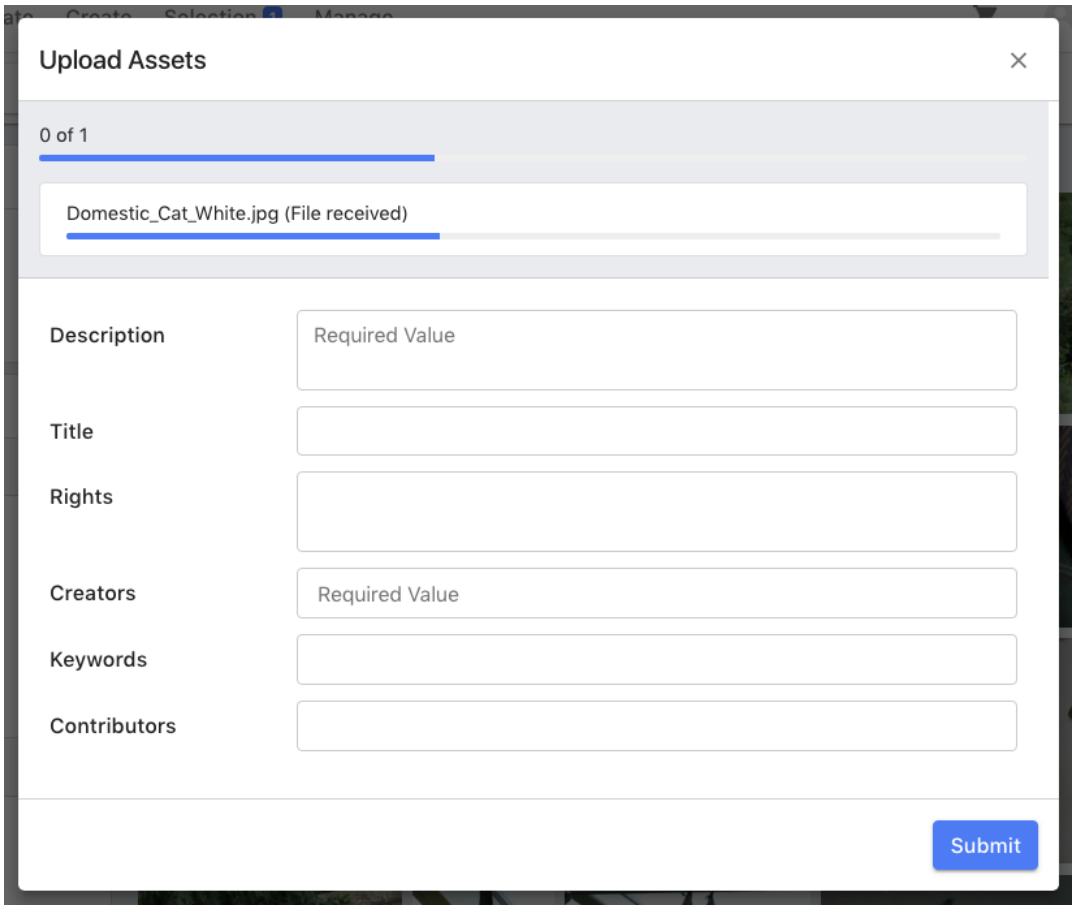


They can be configured to appear when a user uploads a file, usually on the Upload component or Workspace level.

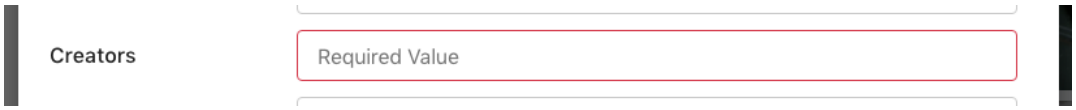
These Forms function similarly to other Forms, with a few exceptions. When an upload Form is presented, the upload will eventually pause, waiting for the Form to be submitted. Once done, the metadata is added and the files, now MediaBeacon assets, are moved to the designated upload location.

Required Fields

It's common to have one or more fields be required to be filled in order to submit any values on the form. In this state, a field will have a "Required Value" indicator.



No values will be entered and the download will not continue until a value is entered into all required fields. If not, an error will be shown for each field still required.



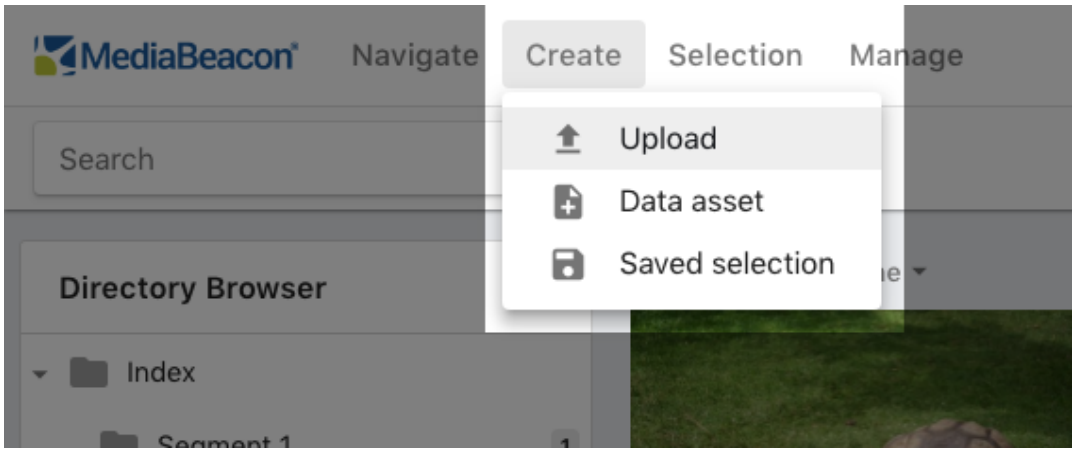
To cancel an upload at this stage, the user may click the "X" button in the upper right of the Upload dialog.

3.10.5. Upload via Create Menu

The standard method for users to bring new assets into MediaBeacon.

This method uses the Upload command in the Create Menu, opening the Upload dialog.

Upload Dialog



File Destination

The user may choose one of two options for the target directory of the upload: Standard Directory or Current Directory.

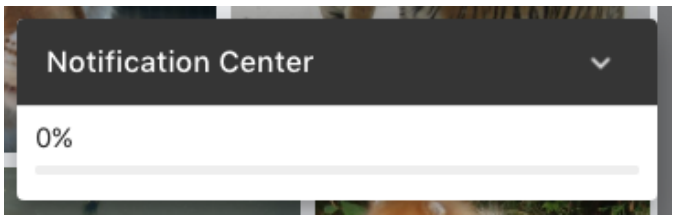
- **Standard Directory:** The upload location will be a folder named "upload", located under "Index". This directory is named with the uploading user's username and a timestamped directory for each upload event.
  - Index/upload/username/2018.10.10 12.34.56
  - **Current Directory:** This option will set the currently-selected directory in the Directory Browser as the upload target directory.

Select File

This button opens a standard OS-level file-picker, allowing the user to pick a file to upload. Additional files may be included in an upload.

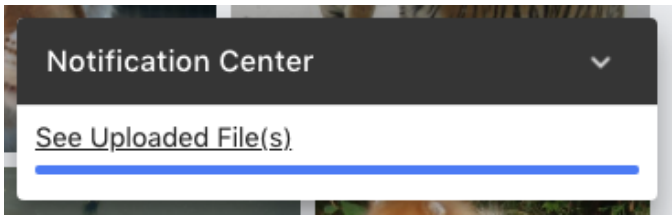
Upload Progress

When the user clicks the "Upload" button, the notification center will show progress of upload.

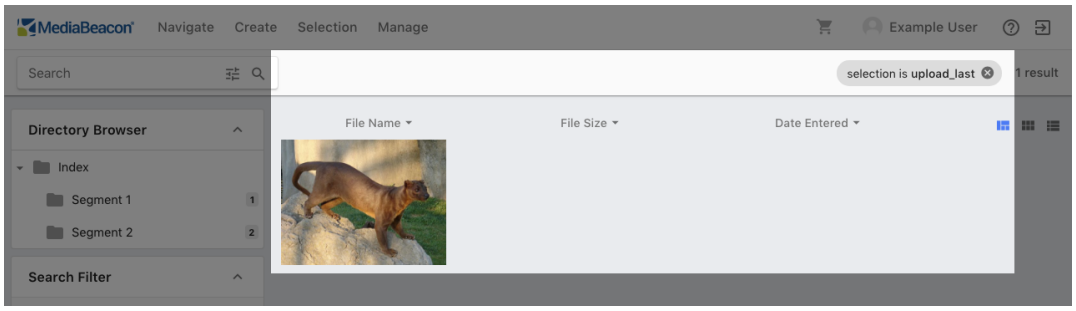


Last Upload Selection

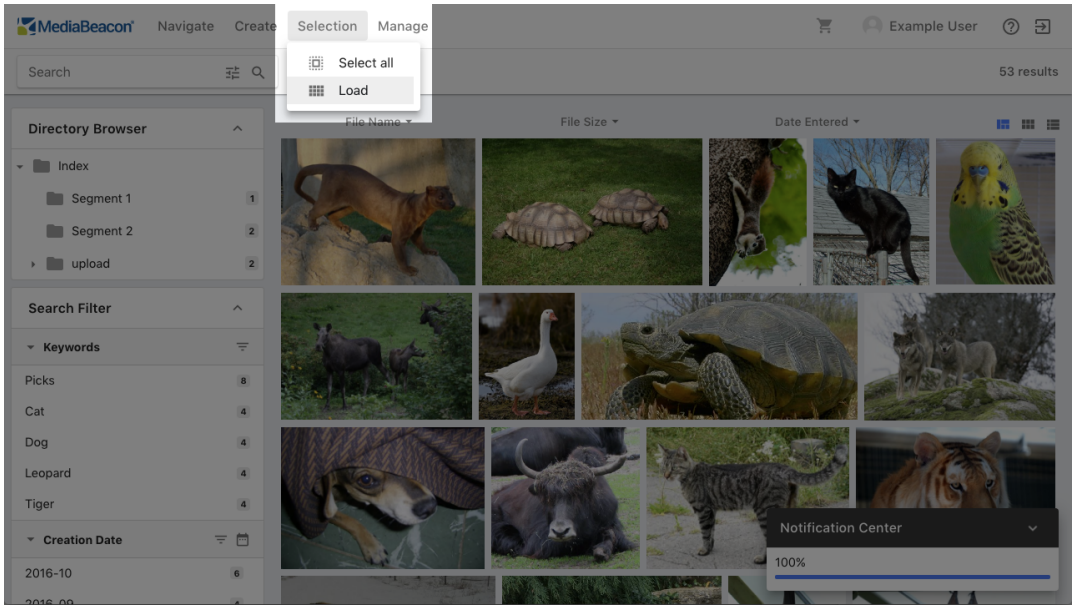
When the upload is finished, the notification center will display a click-able link: "See Uploaded File(s)".

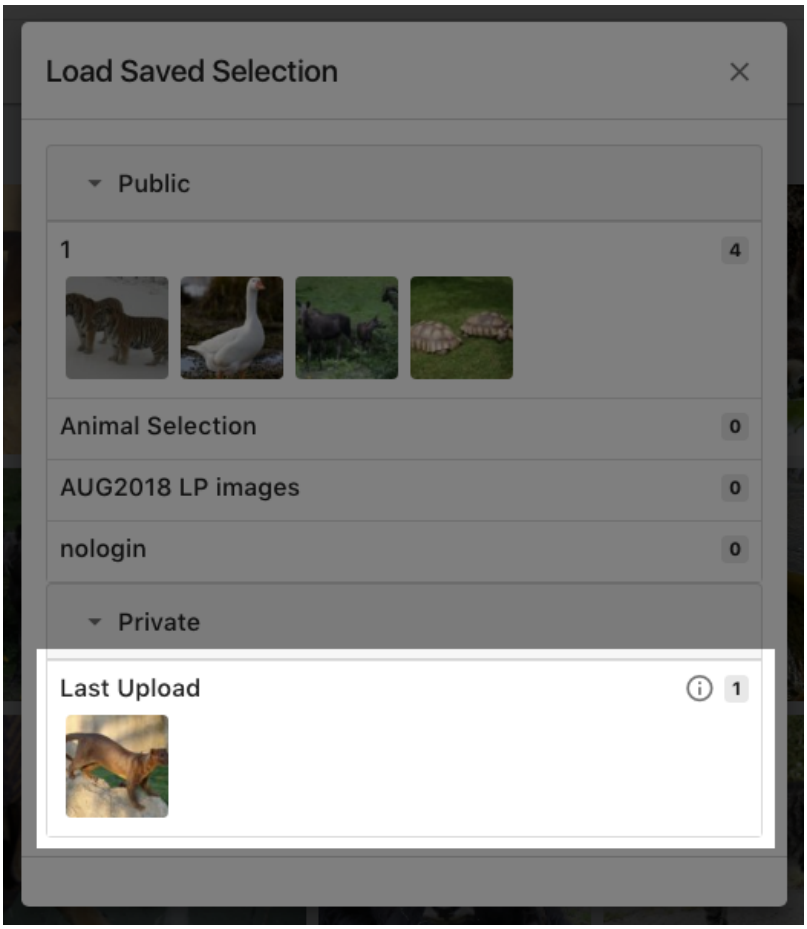


Clicking here will set the search criteria to selection is **upload_last.** This is an automatically updated saved selection that contains the assets in the user's last upload.



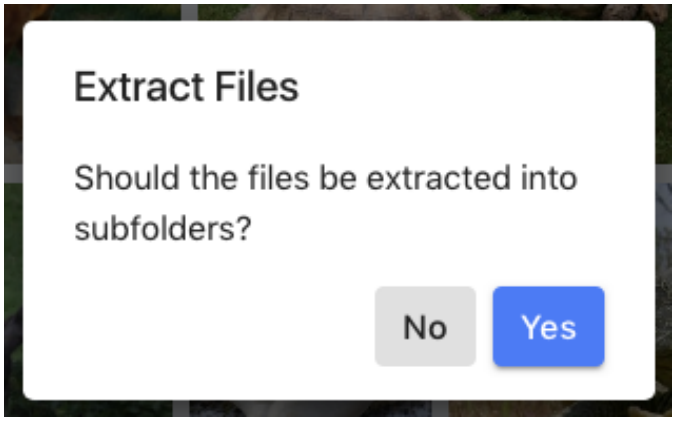
This selection may be recalled at any time by choosing "Load" in the Selection menu.





Uploading ZIP Archives

When a ZIP archive is uploaded to MediaBeacon, it will present the Extract Files dialog.



The user may choose:

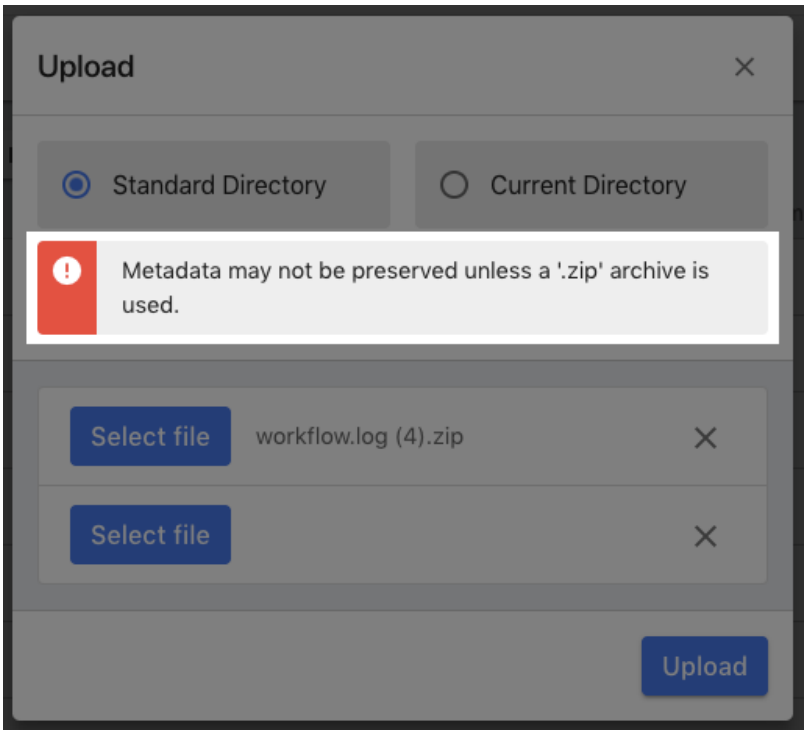
- Yes: The contents of the ZIP archive will be extracted, being placed in the chosen directory.

- **Note:** If the ZIP archive contains a directory structure, that will be reconstituted within MediaBeacon

- No: The ZIP archive is uploaded and itself becomes an asset. MediaBeacon does not preview the contents of ZIP archives in any way, and any metadata written to the ZIP asset are not inherited by the contents.

Metadata Preservation

When added to the upload dialog, some files (based on file extension) cause a warning to appear in the Upload dialog: "Metadata may not be preserved unless a '.zip' archive is used."



This only pertains in fairly rare circumstances; when XMP is stored in a file's Alternate Data Stream (Windows) or Extended Attributes, com.apple.ResourceFork (macOS).

Some file formats that cannot contain XMP metadata, (such as PNG) may have this condition. In order to keep the metadata with the file, MediaBeacon appends the metadata via one of the aforementioned methods during download.

In this case, to upload the PNG image toMediaBeacon and retain the metadata, the asset would need to be ZIP compressed. However, unless the metadata of the original is required, this would be unnecessary.

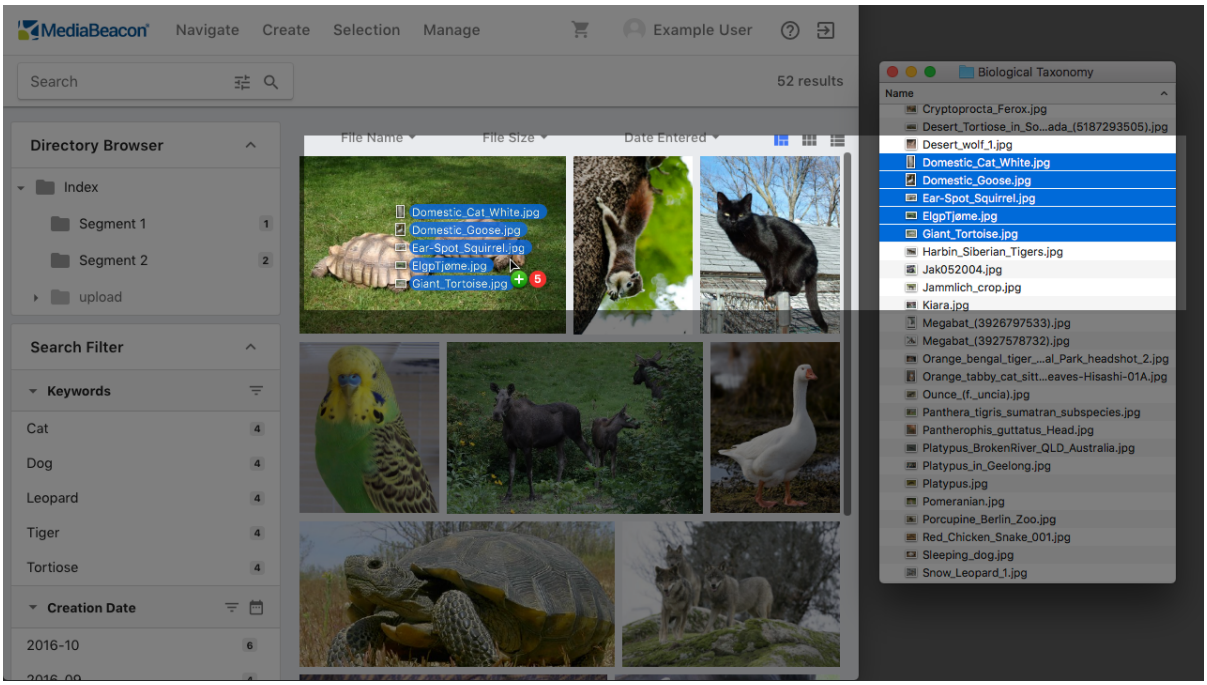
3.10.6. Upload Via Drag and Drop

Users may upload to MediaBeacon by dragging and dropping one or more files from their OS desktop into their browser window.

Several different areas in the UI are valid places to drop files, referred to as **upload drop zones.** Each of these may trigger different options

Note: This method of upload, and each of the below methods are configurable by system administrators and may or may not be present in all MediaBeacon instances.

View Component

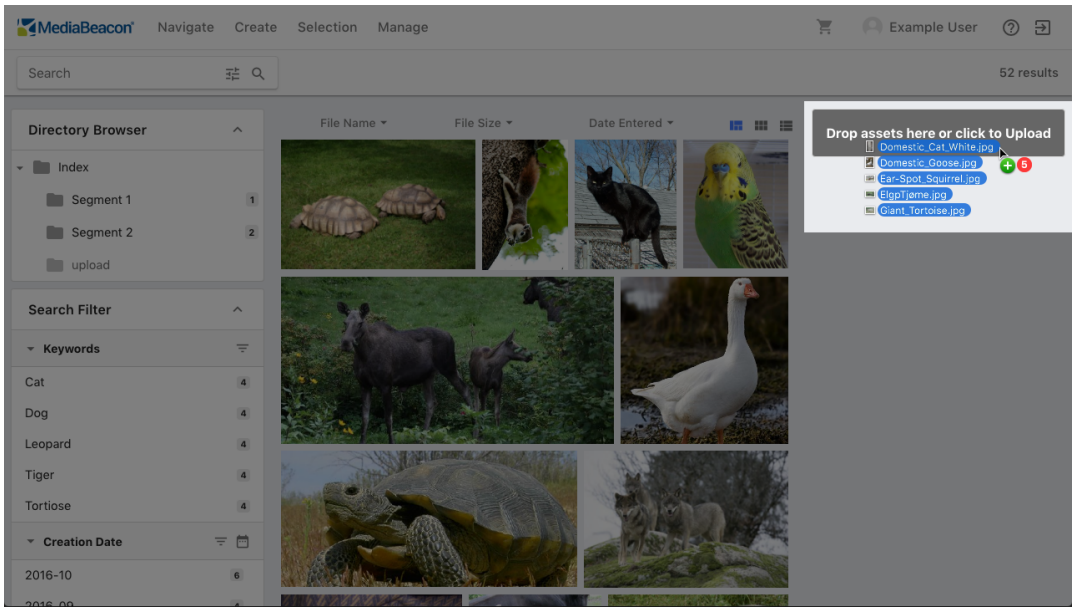


- The view component on a workspace may be configured to act as a drop zone.
- The upload location (destination of files) is preset by a system administrator.

Optional Configuration

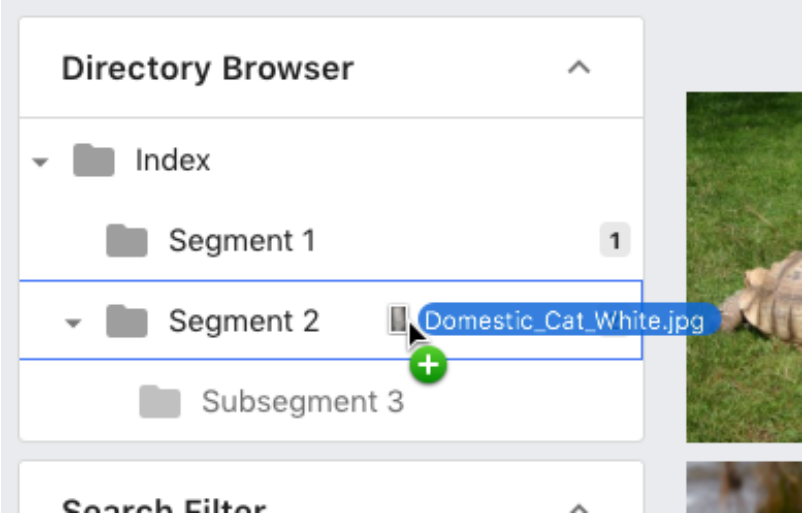
- **Upload to Selected Directory:** This component may be configured to uploaded files to the currently selected directory in the Directory Browser.
- **Asset Linking:** A link is created between the uploaded assets and the asset upon which they are dropped.

Upload HTML Component



- This is the most common configuration, with one or more present in the UI.
- They may also be clicked to show a standard Upload dialog.
- Note that this component's appearance is fully customizable, they may have a different designs in any MediaBeacon instance.
- The upload location is preset by a system administrator.

Directory Browser



- Any folder may be drag and dropped to set the upload location.
- Hovering over a directory with subdirectories will cause it to "snap" open to show subdirectories.

Optional Configuration

This component may allow each directory displayed to act as a drop zone, uploading to that directory.

Workspaces

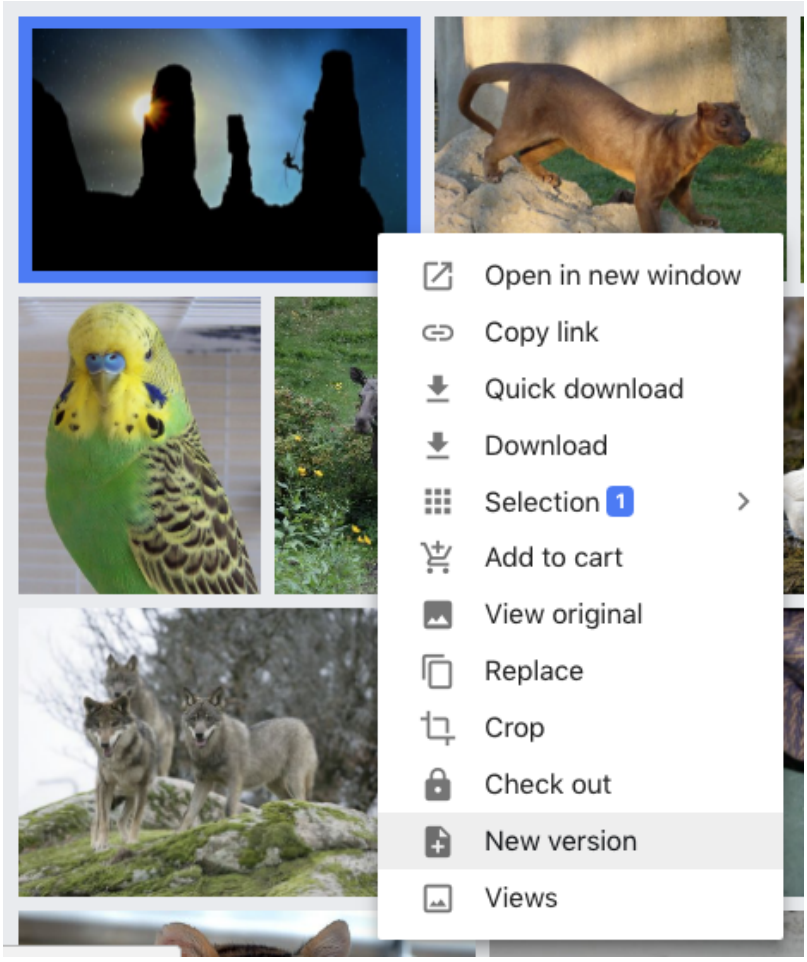
- If the user drops files on a component that has no upload options, or in an area that has no component, the workspace itself will act as an upload drop zone
- Workspace uploads are placed in the Standard Directory.

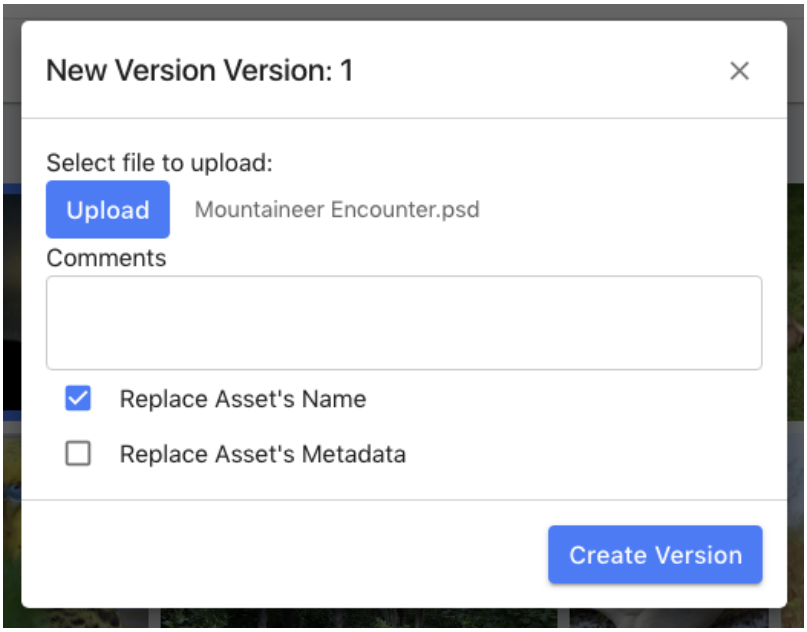
3.10.7. Versions

This function allows the "file" portion to be updated while retaining the same "asset" information, such as Asset ID and metadata.

An example would be the need to do photo touch-up on an image that's already been tagged with metadata, to remove a photographic flaw, or to color correct it.

To make a new version, the user right-clicks an asset and chooses "New Version" from the contextual menu, displaying the New Version dialog.

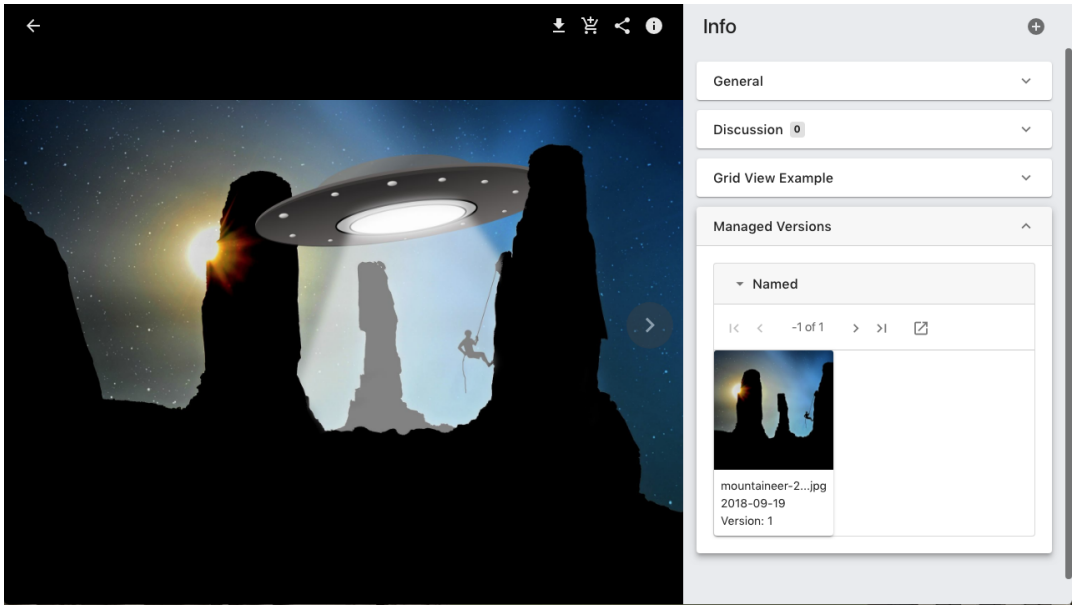




- **Upload** button: Opens a standard OS file picker to choose any file to upload as replacement.
  - Note that no Upload Form is displayed for this operation, regardless of other configuration, as it's being used with a preexisting asset.
- **Comments:** Text here can be used to identify the version.
- **Replace Name:** This option will change the name of the asset to the new file. This is especially useful when the new file is of a different file format.
- **Replace Metadata:** Optionally, XMP metadata in the new file may replace metadata in the asset. This will remove all metadata (except Asset ID), even fields not present in the uploaded file.
  - **Note:** Some metadata is always changed to match the new version, such as: File Size, File Format, and Color Profile.

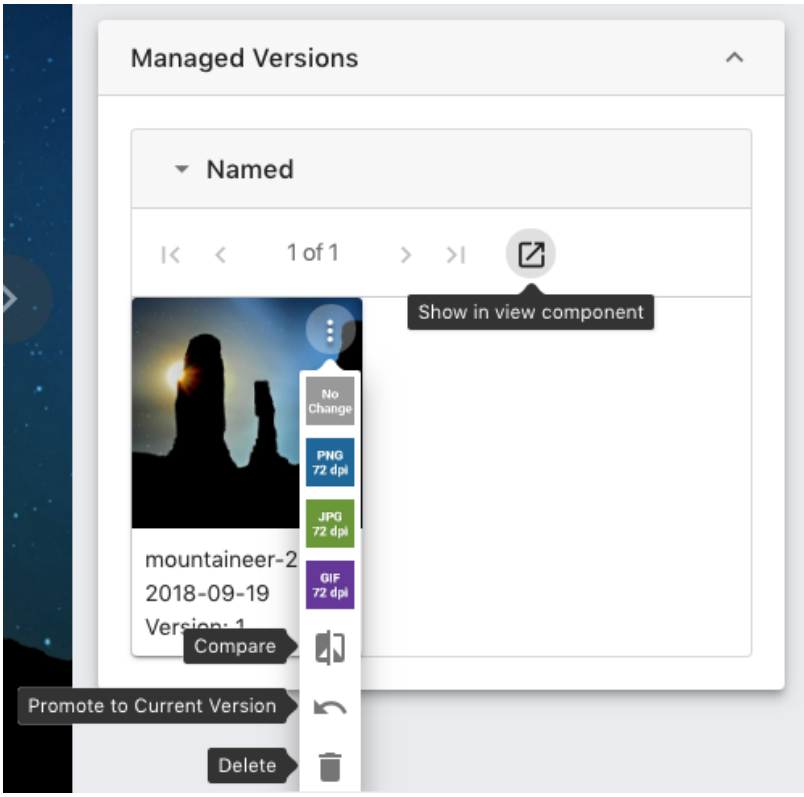
Of note is that this form of upload does not trigger Upload Forms.

Once uploaded, the new version if the image becomes the current version of an asset, and the older versions are accessible in the Managed Versions Form tab.



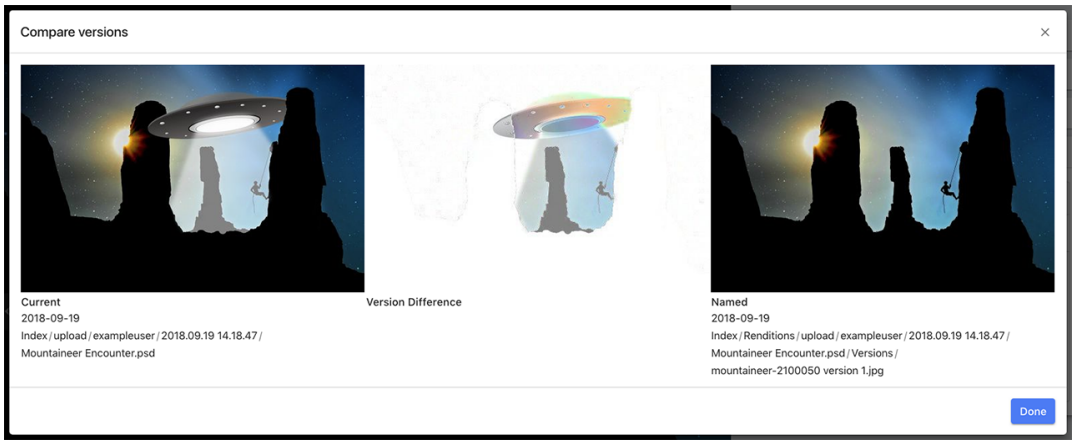
Past Versions in the Managed Version Form

The Managed Versions Form tab is used to display the previous versions of an asset.



- A spin down panel, "Named" shows all versions. This interface is paginated and has a button to show all versions in the current view component.

- **Show in View Component button: This will display all past version of an asset in the view component.**
- **Asset Action Button:** When an asset is hovered over, this icon is shown. It shows a submenu with the following commands
  - **Quick Download** or **Conversion Preset** buttons: downloads that previous version using the quick download or a conversion preset.
  - **Compare**: Opens the "Compare Versions" dialog, showing a image that represents the difference in pixels between the two versions.



  - **Promote to Current Version: This will make an older version into the current version**
    - **Note: This action will not change the asset file name**
  - **Delete**: Removes a version permanently.
- Version Numbering: The current version number is 1 higher than the highest number shown on all the versions under "Named".
- Managed Versions only shows versions when viewed from the current version asset.

Versions and Asset ID

Non-current versions will have their Asset ID changed while the current version will retain the original Asset ID.

Note: The Check Out function is similar to Versioning and usually only one of the two functions are used in any given installation.

3.11. Metadata

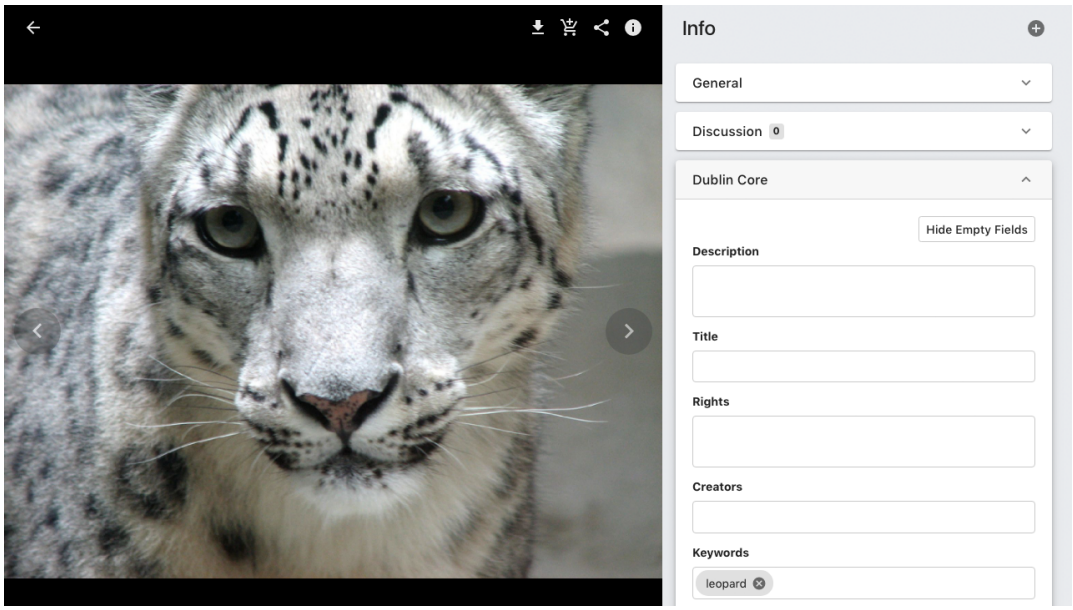
Metadata is data about data. This section details how MediaBeacon interacts with it.

MediaBeacon uses the Adobe XMP standard to store metadata.

How XMP Metadata Works

XMP metadata is written into the data of a file, making the metadata strongly-attached. This allows the metadata to travel with the file, instead of residing in an external source. This approach to metadata also allows XMP-aware applications to read and write metadata to that specific file, so that that all future users of the file can use this information.

From the user's perspective, metadata **values** are displayed in **fields**, which are collected together in **schemas**. InMediaBeacon, the interface that displays these data structures are called **Forms**.



When XMP metadata is written to a file, each value is stored with the field and schema, so the information will always have context. An asset containing a metadata value is sometimes referred to as being **tagged** with that value.

Over the life of the XMP standard, various industry standard schemas have been developed, such as Dublin Core Properties or Adobe Photoshop Properties. Although there are standards that exist, one aspect of XMP is that the display of metadata is variable. A common practice is to label fields differently than their canonical field names. A good example is data structure behind the Dublin Core Properties "Keyword" field:

http://purl.org/dc/elements/1.1/subject

The above is an example of a **XMP/XML expanded name** consisting of a **namespace URI** (aka namespace name), and a **local name**.

- **Namespace URI:** "*http://purl.org/dc/elements/1.1/*" This value is used in MediaBeacon to define a schema, a collection of related fields. The schema name "Dublin Core Properties" is a label applied to make this information more human-readable.

- **Local Name:** "subject" This designates the field itself, "Keywords" is the display label.

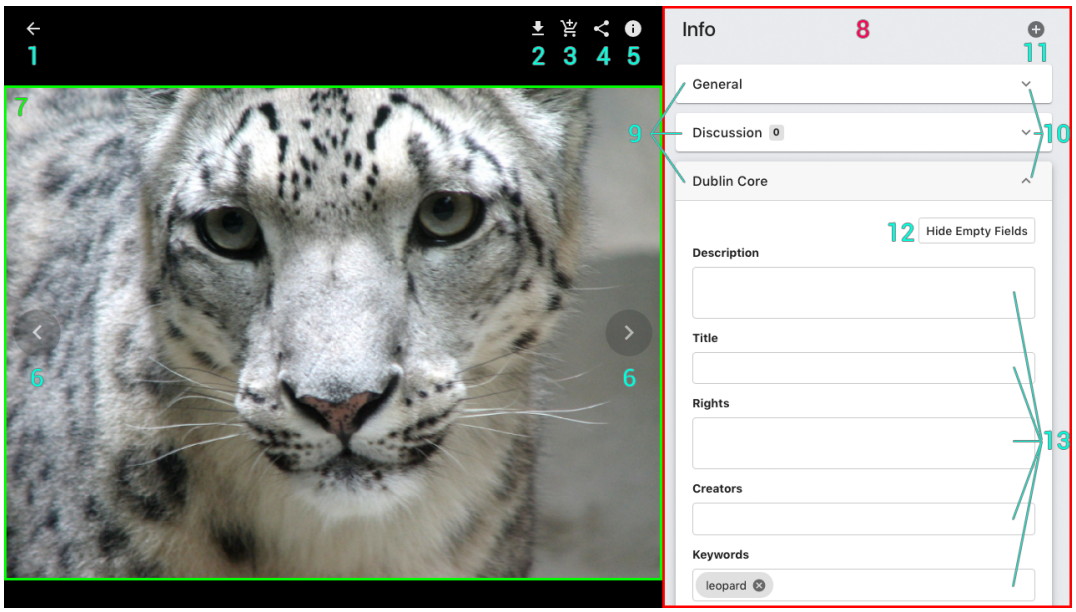
MediaBeacon's Forms can change the label (display names)l of schema or fields, but the data entered will remain unchanged.

The articles below will discuss different ways to view and edit metadata in MediaBeacon.

3.11.1. Asset View

Asset View is a full-screen dialog that is used to view the metadata of a given asset.

Asset View Dialog



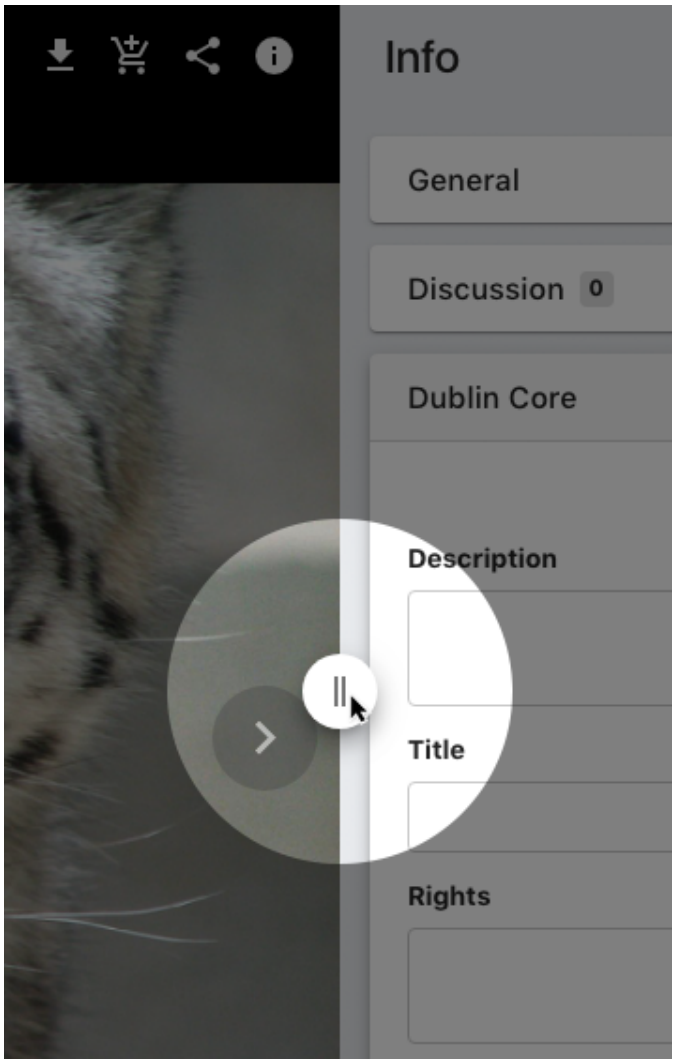
Asset view can be opened in any view component by double-clicking the asset preview, or pressing the space bar when an asset is selected.

1. **Exit Asset View**: Closes the Asset view. This can also be done with the Escape Key. Note that this is **not** the browser's back button
2. **Quick Download:** Downloads a copy of the displayed asset.
3. **Add to Cart:** Adds the displayed asset to the user's cart.
4. **Send External Link:** Sends a link allowing non-system users to download the displayed asset.
5. **Toggle Info panel:** Opens/closes the Info panel.
6. **Pagination:** When the current view contains multiple assets, these arrows will be shown, indicating that the user can click them or use the left and right arrow keys to display the next or previous Asset View for the assets in the current view. Metadata values that have been entered but not been saved will be saved when the pagination is used to move to another asset.
7. **Asset Preview Panel:** This shows a scalable asset preview. This larger preview will generate when needed, so if the image is blurry, a higher res preview will appear after a few seconds. This will only occur if the image is a raster image of sufficient size from which to generate a higher resolution preview.
8. **Info Panel:** Displays Forms
9. **Form Tabs:** A list of Forms, in an accordionist interface, allowing one form to be opened at once. .

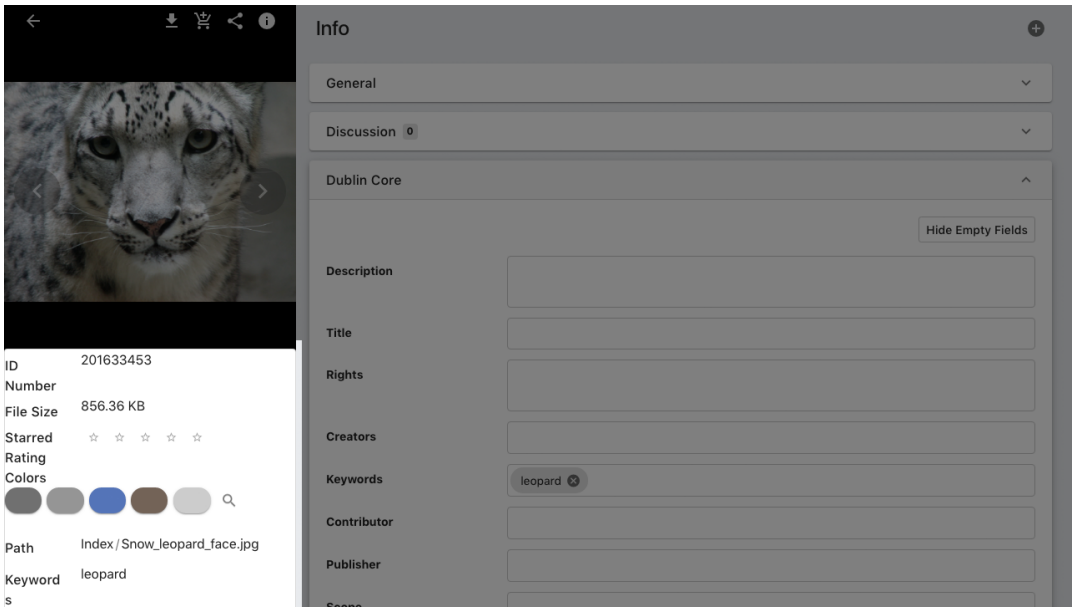
10. **Toggle Form tab indicator:** Displays open and closed status of individual Forms.
11. **Add Form tab:** This button in the upper right of the Info panel allows the user to add available Forms to the list below
12. **Hide Empty Fields**: The button will hide any fields with null values. In this state it will display as "Show Empty Fields".
13. **Form fields**: Hold metadata values.

Other Controls

1. When the cursor is hovered over the left edge of the metadata panel, the resize handle is shown, allowing the user to change the width of this panel and the Asset preview.



2. When the Info panel is expanded as far as possible to the right, the "General" tab is displayed below the asset preview.



3.11.2. Standardized Associated Assets UI

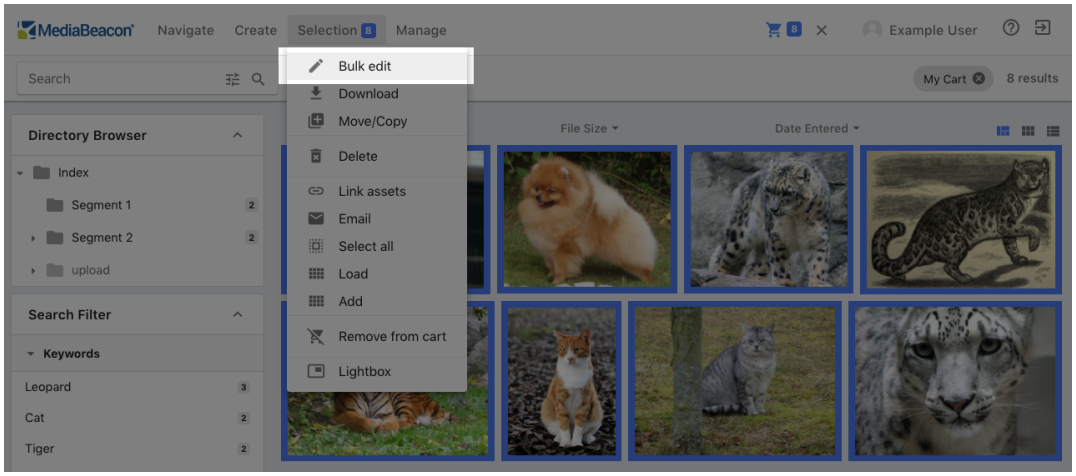
This feature standardizes the display of varied types of “associated assets.” Those seen in the Asset Links Form, Document Report Form, Managed and Automatic Versions Forms use this new UI type.

The interface now displays associated assets as a list of horizontal panels, with pertinent information shown to the right. When any item is moused over, a vertical ellipses icon is shown, allowing the user to access a contextual menu with commands for each type of associated assets.

3.11.3. Bulk Edit

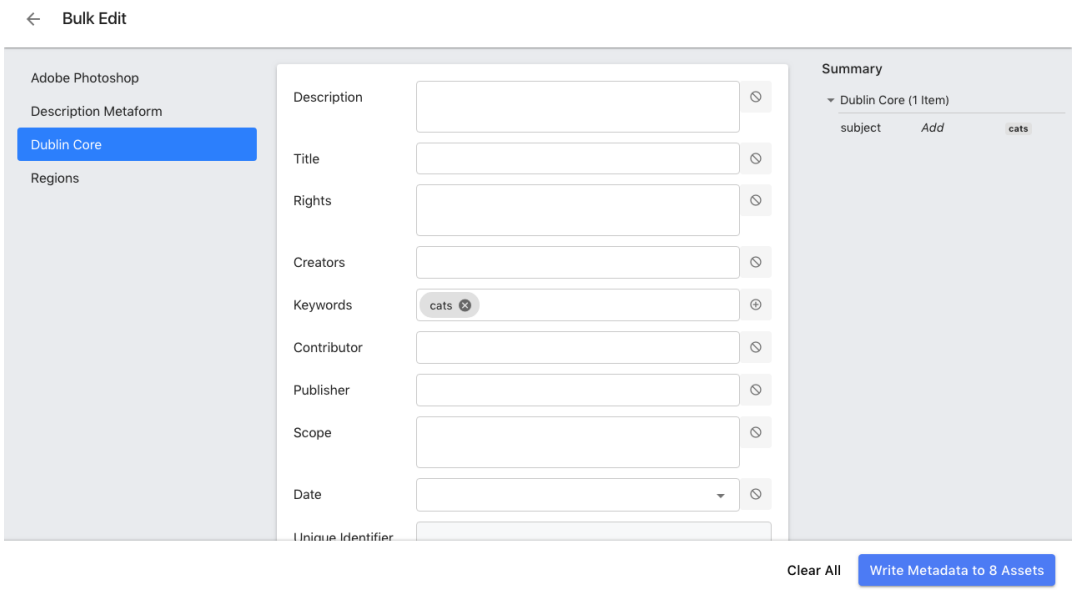
The Bulk Edit function is used to write a set of metadata to an entire asset selection.

Once an asset selection is made, the user may choose "Bulk Edit" from the "Selection" Menu or "Selection" in the contextual menu



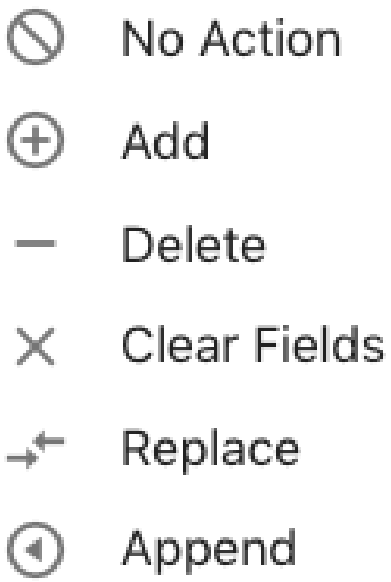
Bulk Edit Dialog

This dialog allows the user to pick from a list of available XMP Forms, enter metadata changes to perform, and to see a summary of all the changes being made before committing the metadata write.



One aspect of the Bulk Edit function that makes it especially useful is that it can write to multiple fields in multiple Forms at once.

Field Edit Actions



When mass-editing metadata with Bulk Edit, each field can be written to in a variety of ways, chosen by clicking the icon to the right of each field and choosing from the menu there.

One of the following actions may be chosen per field, from the Field Edit Action menu and performed on all assets in the selection. Not all field types have all these selections.

- No Action: No metadata is written on this field.
- Clear Fields: All metadata will be removed from this field.
- Replace: All previous metadata will be overwritten with the entered value

Special Actions

- Append: Appends a string of text to the end of a Text Area or String field.
- Add: Adds a given value to a multi value field, retaining all previous values.
- Delete: Removes only the specified value from a multi value field, retaining all other values.

Summary Panel

This panel shows all metadata changes that will be written to the asset selection. Clicking on each field here will switch the selected Form tab that contains that edit, making alteration easy.

3.11.4. Bundles

In MediaBeacon, a bundle displays various data structures as assets.

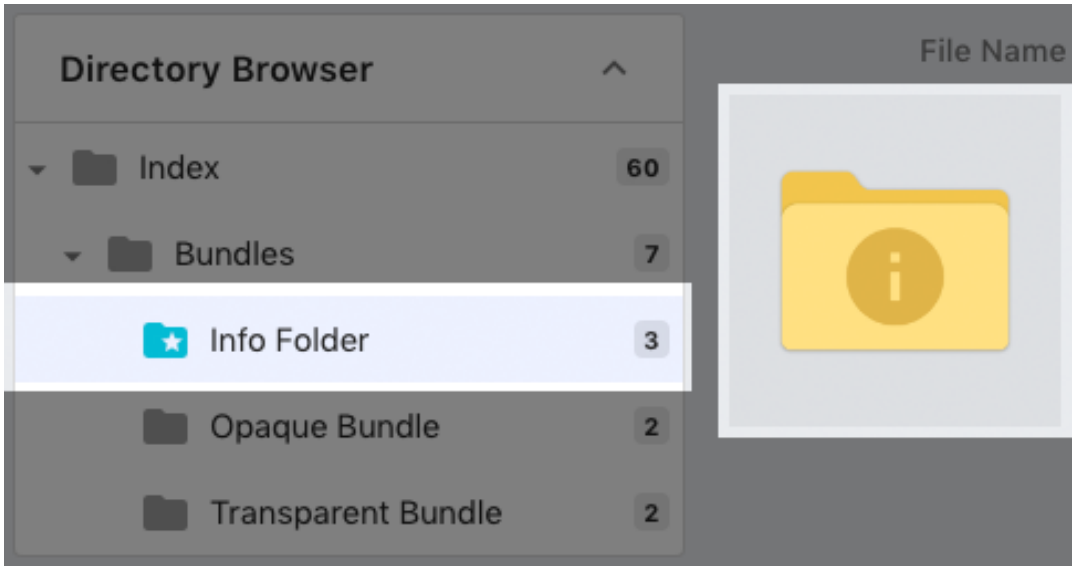
There are five bundle-related functions:

- Folder Based
  - Info Folder
  - Transparent Bundle

- Opaque Folder
  - Results-Based
  - Search Bundle
  - Selection Bundle

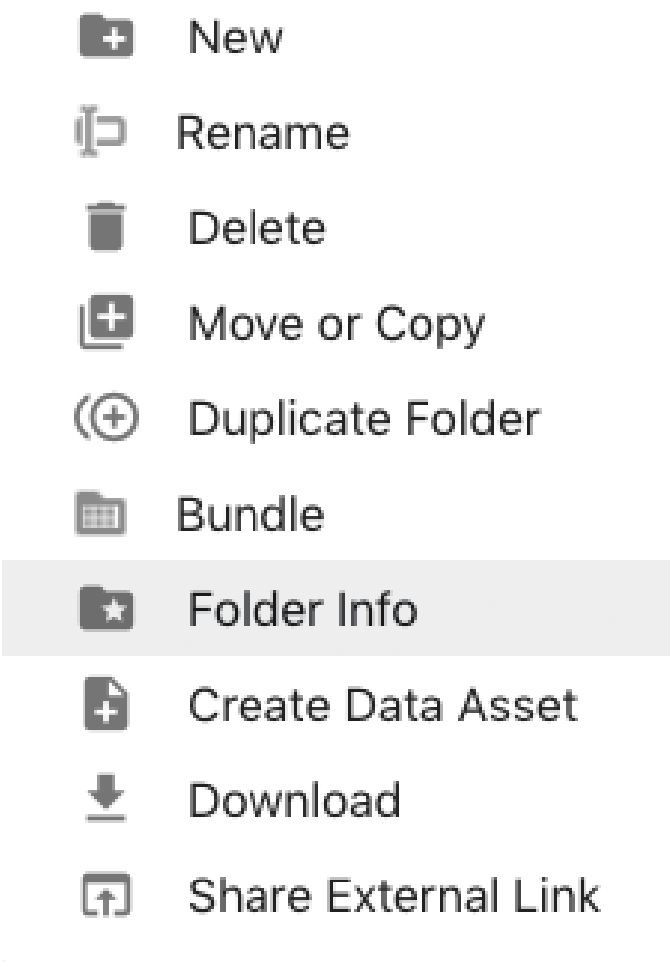
Note: Creating bundles is only allowed when an administrator has allowed the user's group to have the "Administer Bundles" permission.

Info Folder (aka Folder Info)



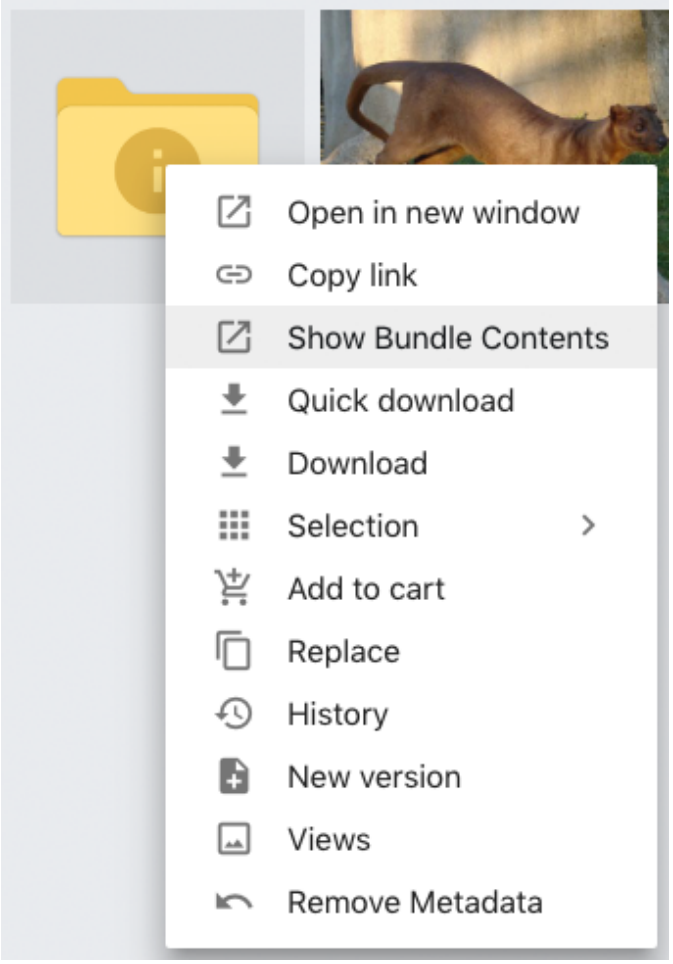
An info folder in the Directory Browser and in the Infinite Scroll View

To designate a folder as an Info Folder, select "Folder Info" in the contextual menu for a given folder in the Directory Browser component.

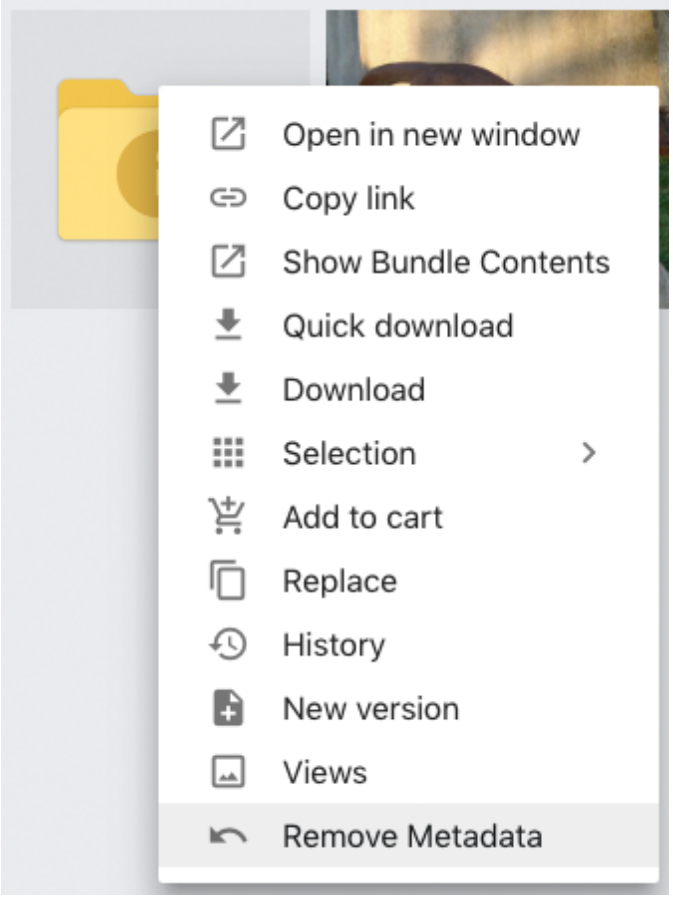


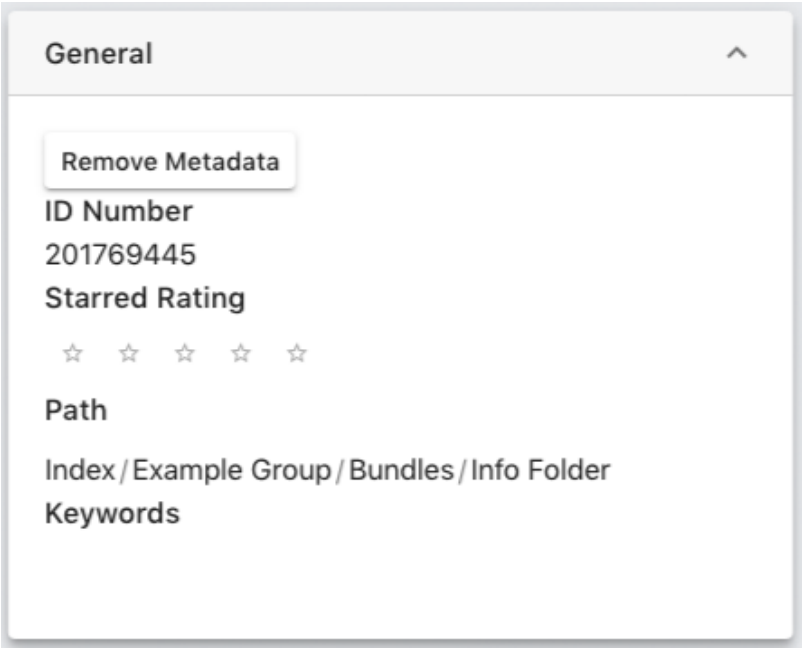
This is the basic bundle type that contains metadata about a folder.

- It is represented in View components by a folder-style icon.
- It acts as an asset so it can be tagged with metadata and returned in searches.
- The contextual menu for a bundle contains a special command: "Show bundle contents". This selects the folder in the Directory Browser, filtering the current view.

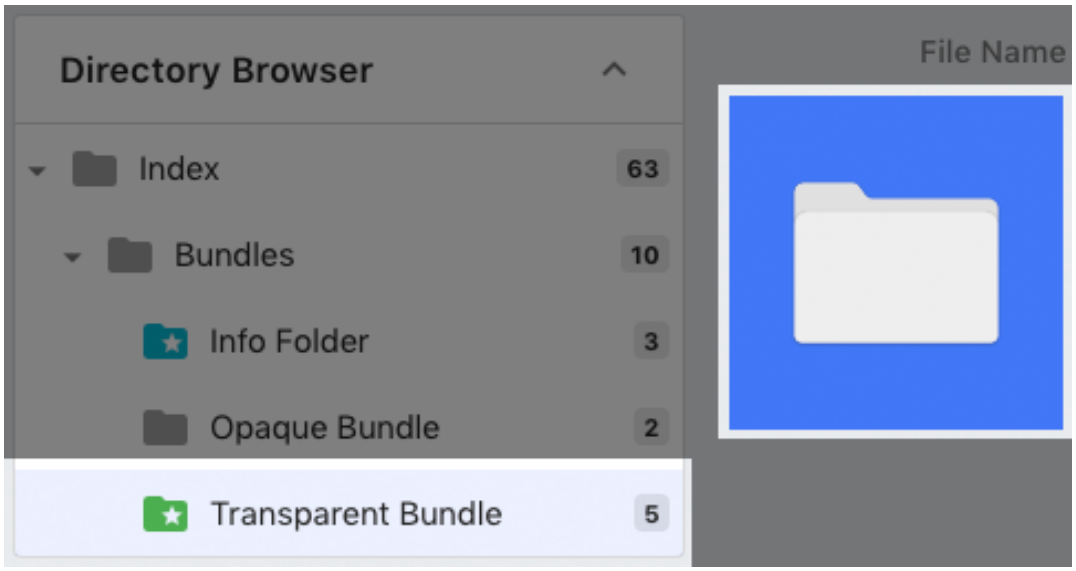


- Files may be moved in and out of an info folder, the same as any other folder / directory.
- Unlike the folders in the Directory Browser, bundle icons in view components are not valid drag and drop targets for the purposes of moving or copying assets. Drag and drop will instead prompt the asset linking function.
- The Info Folder can be returned to a normal folder, removing all metadata by using either the "Remove Metadata" command in the contextual menu, or by clicking the "Remove Metadata" button in the Asset View's General Tab.


Open in new window
Copy link
Show Bundle Contents
Quick download
Download
Selection
Add to cart
Replace
History
New version
Views
Remove Metadata


General
Remove Metadata
ID Number
201769445
Starred Rating
Path
Index / Example Group / Bundles / Info Folder
Keywords

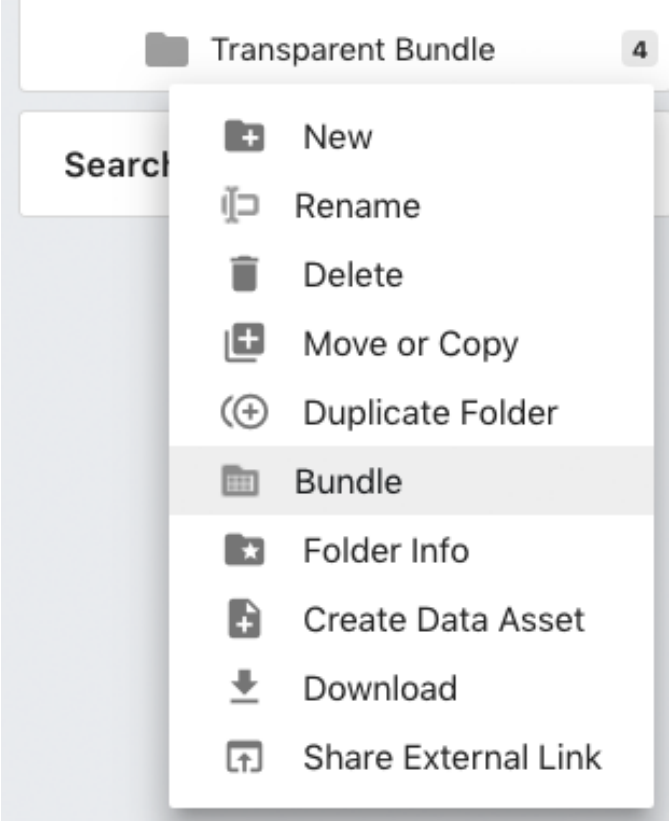
Transparent Bundle

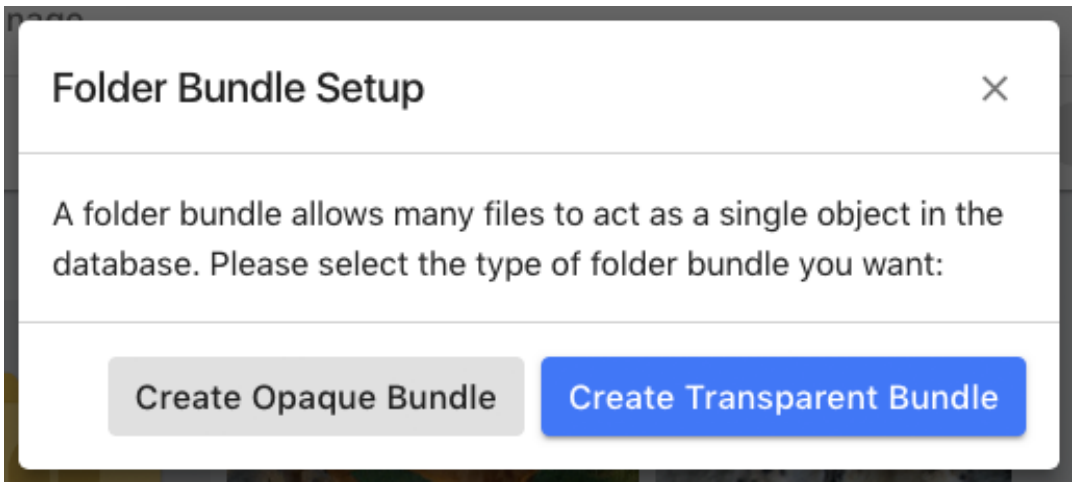


A transparent bundle in the Directory Browser and in the Infinite Scroll View

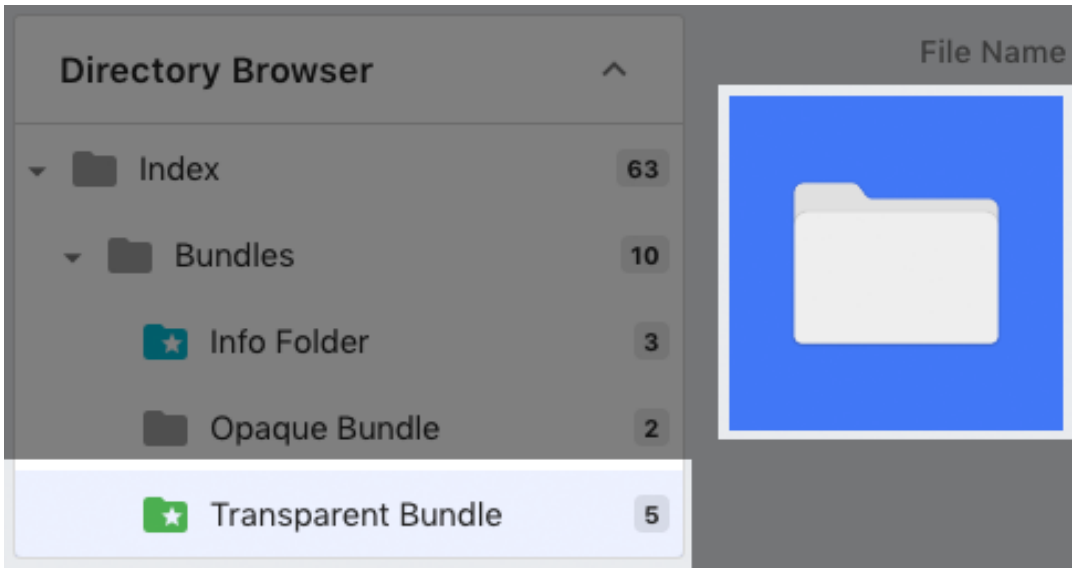
This type of bundle has all the functionality of an Info Folder, but with an added feature. Assets in a transparent bundle will inherit the metadata written to "bundle fields" of the parent bundles.

To create a transparent bundle, choose "Bundle" in the contextual menu of a folder and choose "Create Transparent Bundle" in the Folder Bundle Setup Dialog.





The transparent bundle will be shown in the Directory browser with a green icon and a folder icon in view components



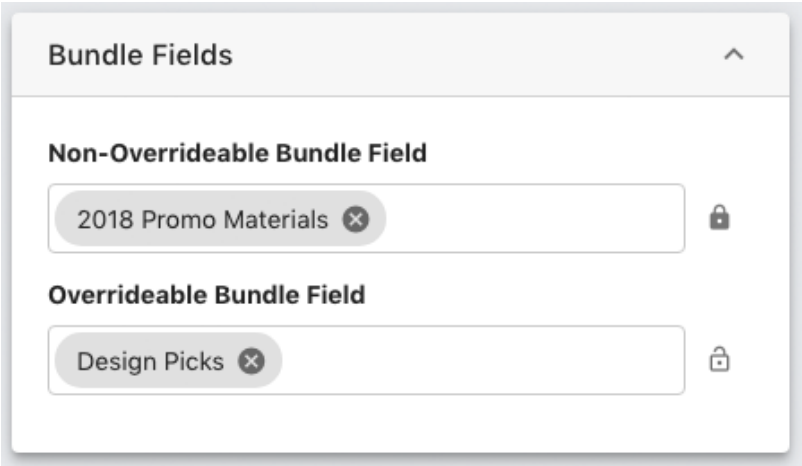
Metadata Inheritance

Fields can be specifically designated as "bundle fields". When a transparent bundle has a value written in a bundle field, child assets will inherit those metadata values. In this arrangement, the bundle is often referred to as the "parent", and the contained assets as the "children". There are two types of bundle fields:

- Non-Overridable: This is the standard bundle field. Child assets inside a non-overridable bundle will have bundle field values controlled by their parent.
- Overridable: This type of field allows child assets to have different metadata in bundle fields.

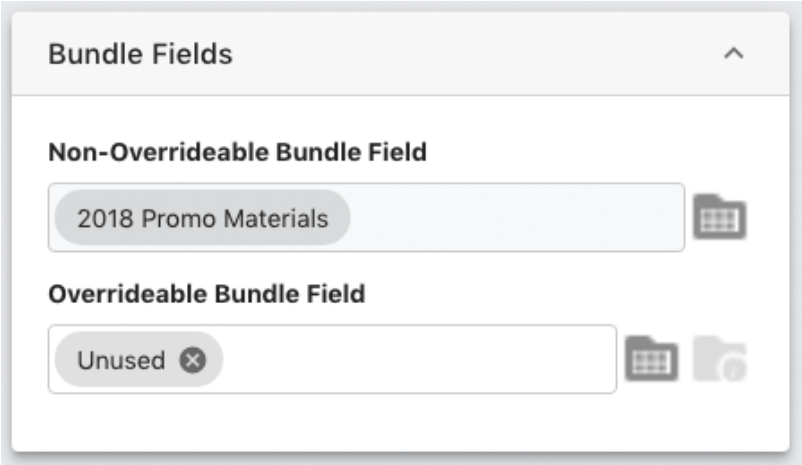
Bundle Field Icons

Bundle fields act as normal fields except when viewed on bundles or child assets. In this case, they are indicated by an icon on their right. Four different icons indicate status:



- Lock icon: Seen on bundle fields of bundle assets, this icon indicates that the value is synced between parent and children.

- Unlocked icon: Seen on bundle fields of bundle assets, this icon indicates one or more one child's value in an override able field is not synced to the parent. Click on the unlock icon to overwrite the values in all child assets to match the parent's values. This icon is only seen on override able bundle fields.



- View parent bundle folder (folder icon): Displayed on bundle fields of child assets, clicking this icon will open the parent bundle in the asset view.
- Use parent bundle folder value (dimmed icon): Displayed on child assets that have unsynced metadata. Clicking will sync the asset's value with its parent.

Retaining Metadata on Directory Change

When an asset is moved out of a bundle with bundle fields, values in those fields are retained. However, when an asset with values in bundle fields is moved into a bundle, those values may be overwritten.

- Non-Overridable bundle field values: These values will always be overwritten by a parent bundle folder.
- Overridable bundle field values: These values are only overridden by a parent bundle if they are blank.

Nested Transparent Bundles

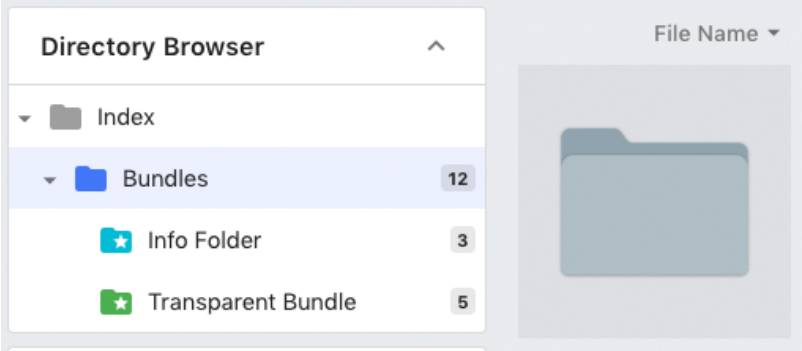
Transparent bundles may be nested within other transparent bundles. In this case, bundles inherit metadata from their parent as other assets would.

The nature of metadata inheritance depends upon the override setting of the field in question. Non-overridable fields inherit the value from the topmost bundle, and overridable fields inherit the immediate parent's value. An overridable field's asset field icons functions are also more specific in this case:

- View parent bundle folder: Open the immediate parent bundle.
- Use parent bundle folder value: Sync the asset's value with its immediate parent.

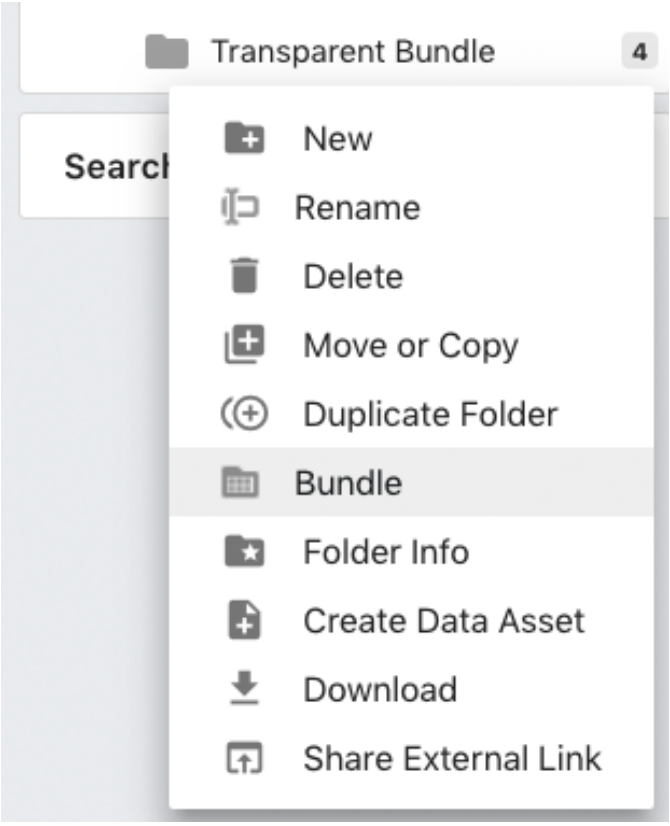
Opaque Bundles

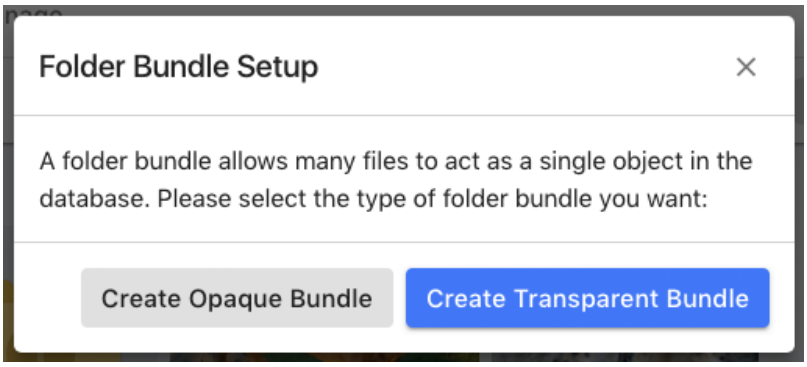
An opaque bundle obscures all contents from the view component and removes the folder from the directory browser, combining the folder and all contained assets into a single asset.



Note that the opaque bundle does not appear as a folder.

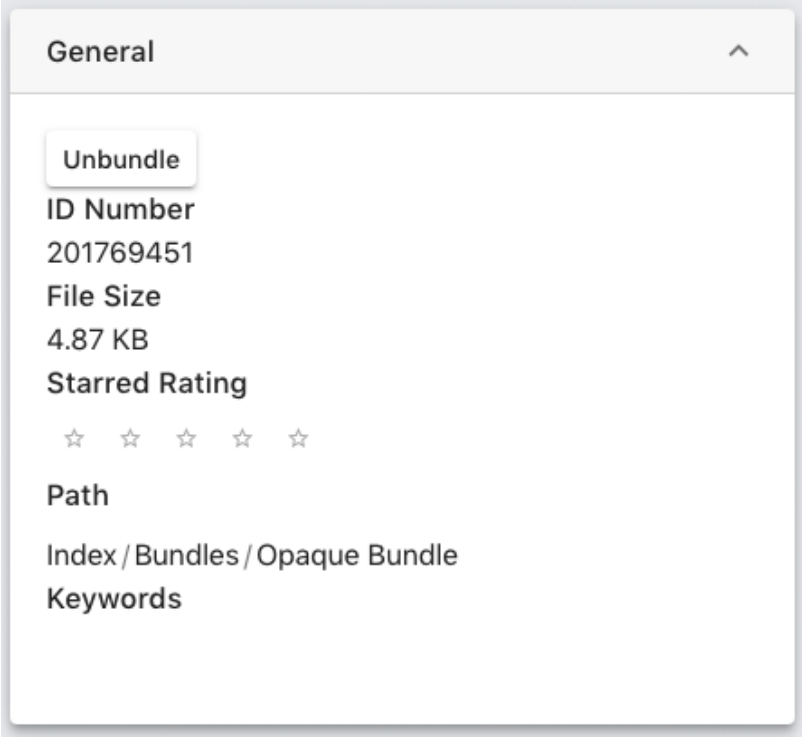
To create an opaque bundle, choose "Bundle" in the contextual menu of a folder, and choose "Create Opaque Bundle" in the Folder Bundle Setup Dialog.





When the bundle is downloaded, all contained assets are included.

To show the contents of a opaque bundle, click the "Unbundle" button on the opaque bundle's Asset View General Tab. This changes the opaque bundle to an info folder.



Results-Based Bundles

These bundle types are asset representations of saved searches and saved selections. These bundles do not contain assets the way folder-based assets do, but have "member assets" that are the search results of a saved search or a saved selection. For more information, see the Saved Searches and Saved Selections sections.

Metadata Inheritance

When bundle fields are used with metadata inheritance bundles, syncing functionality is altered to a metadata "push" functionality. In these cases:

- Metadata is written to member assets only when it is written to the bundle asset.
- There is no distinction made between overridable and non-overridable fields. All bundle fields effectively become overridable.
- Bundle fields in bundle assets will not detect when member assets have differing metadata.

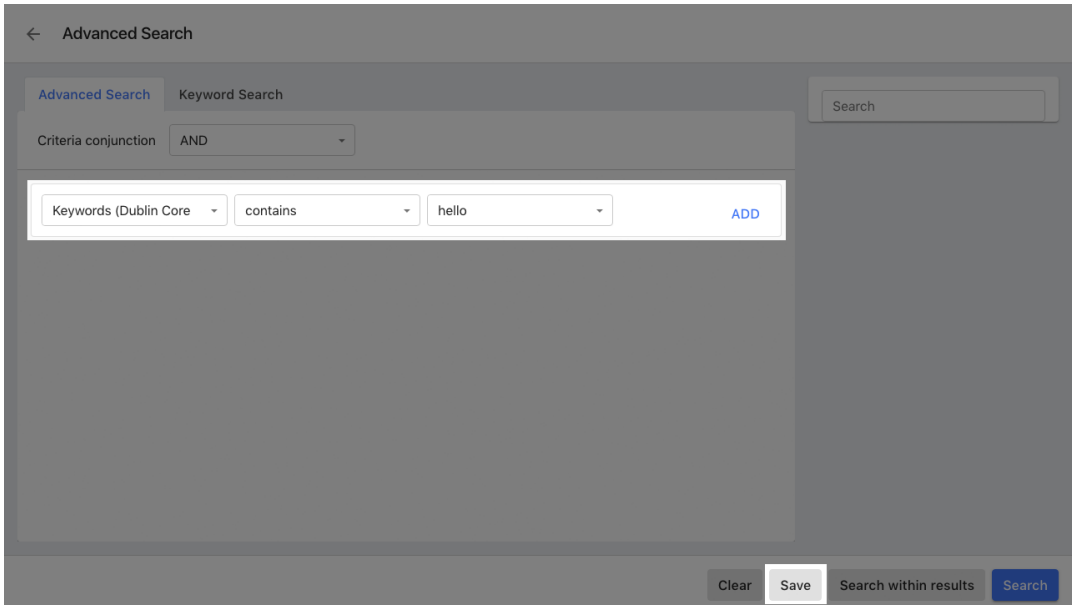
Search Bundle

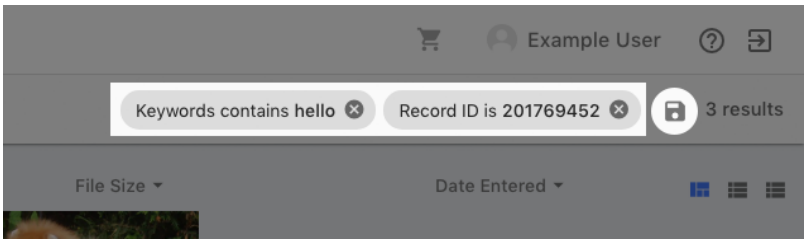
A search bundle is displayed as an asset:

- Visible in view components, not in the Directory Browser.
- Allows complex searches to be saved as an asset.
- The results of the saved search may be shown using the contextual menu command "Show Bundle Contents".
    - The Record ID of the bundle itself is always included with the original search terms so that it will appear along with results in the above case

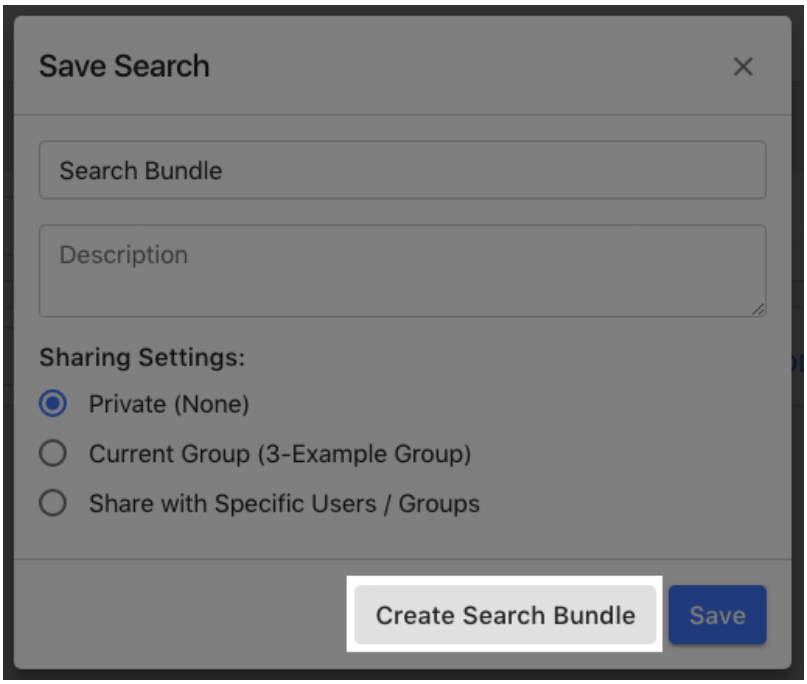
Creating a Search Bundle

1. Click the "Save" button in the Advanced Search Dialog or the Save Search button in the Search Status component.





2. Click the "Create Search Bundle" button in the "Save Search" dialog.



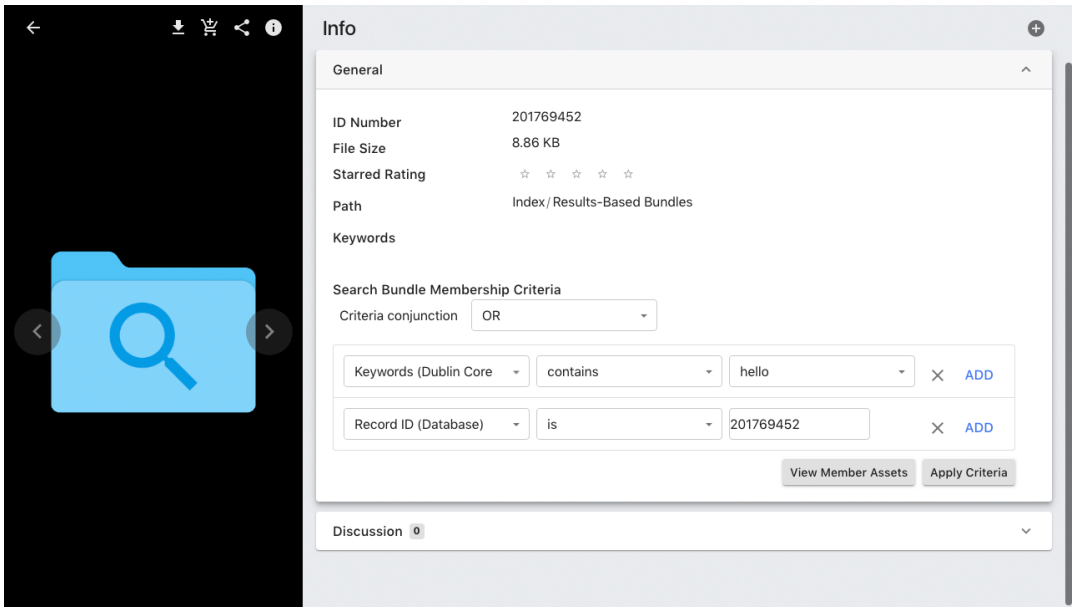
   a. Note: the Privacy settings do not affect the Search Bundle.
3. A new search bundle will be created in the user's "Index/" folder.

A search bundle's contextual menus have a special command, "Show bundle contents" that changes the current view to the bundle and any assets that would be returned by that search.

Editing Search Bundles

The criteria used to define a search bundle is editable on the General tab in the Asset View, under "Search Bundle Membership Criteria", in an interface similar to the advanced search dialog.

Once edits are made, click "Apply Criteria" to save them. The "View Member Assets" has the same function as "Show bundle contents", above.



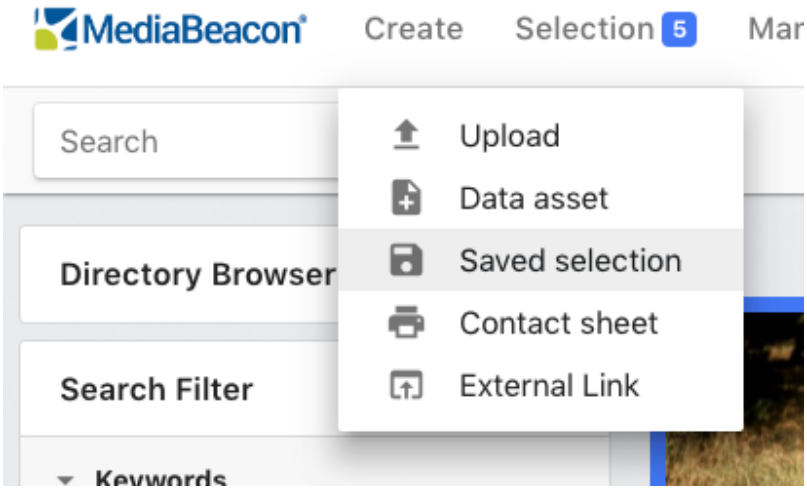
Selection Bundle

A selection bundle is displayed as an asset:

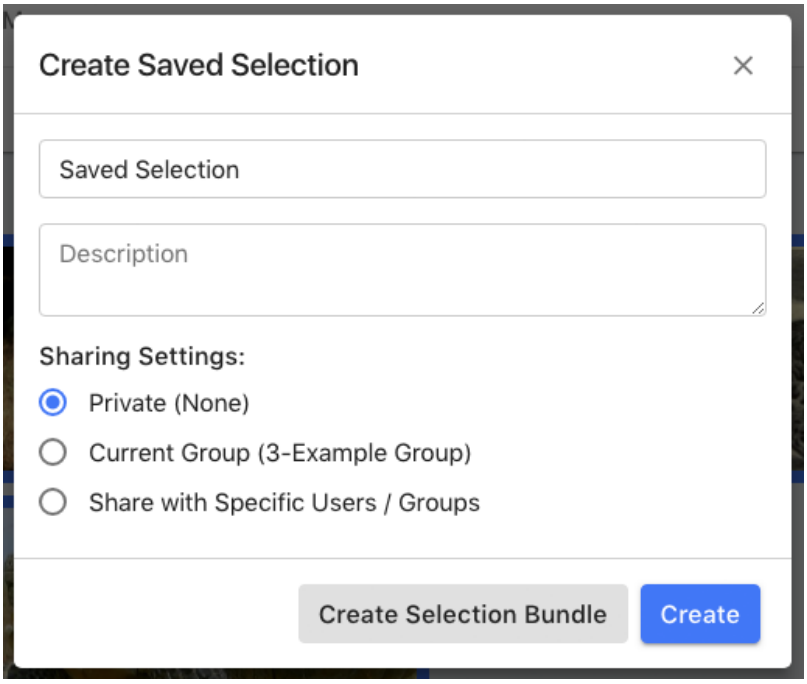
- Visible in view components, not in the Directory Browser.
- Allows saved selections to be saved as an asset.
- The results of the saved selection can be shown using the contextual menu command "Show Bundle Contents".

Creating a Selection Bundle

1. Once a selection is made, choose the "Saved Selection" command in the "Create" menu.



2. Click the "Create Search Bundle" button in the "Create Saved Selection" dialog.



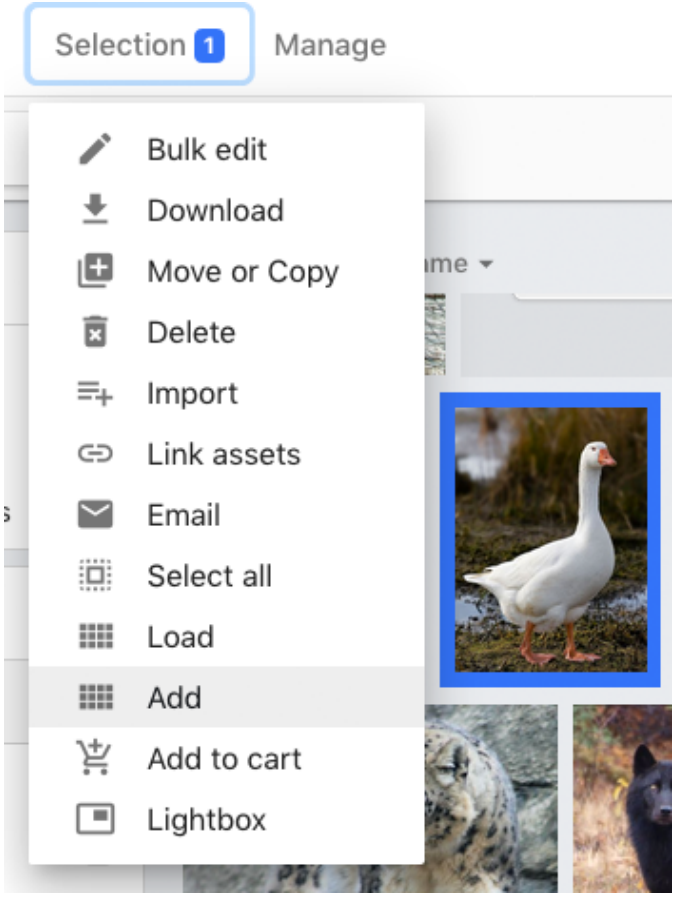
   a. Note: the Privacy settings do not affect the Selection Bundle.
3. A new search bundle will be created in the user's "Index/" folder.

A selection bundle is displayed as an asset that contains its own metadata and allows complex searches to be recalled using a search. The Discussions function allows user to make comments on collections of assets.

Editing a Selection Bundle

Contents of selection bundles can be edited in a limited way. Assets may be added to, but not removed from, selection bundles.

The current selection may be added to a selection bundle using the "Selection > Add" command. This opens the "Add to Saved Selection" dialog that will allow users to click on a selection bundle to combine the contents of the current selection with the selection bundle's member assets.

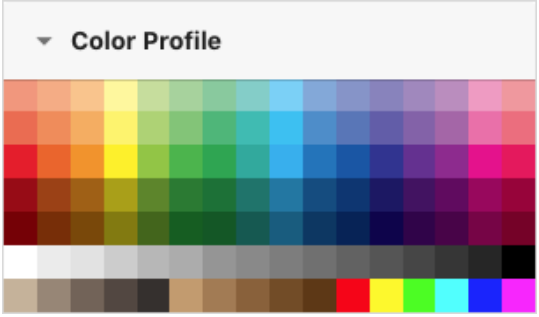


3.11.5. Color Search

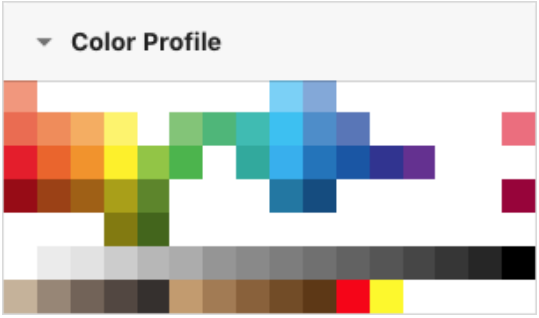
MediaBeacon uses image colors as metadata, which can be used to search and filter assets.

When an asset is uploaded to MediaBeacon, a color histogram is generated, recording the 21 most prominent colors as HEX values in the Color Profile field. MediaBeaconhas two special fields that can be added to the Search Filter component, Color Profile and Pantone® Colors.

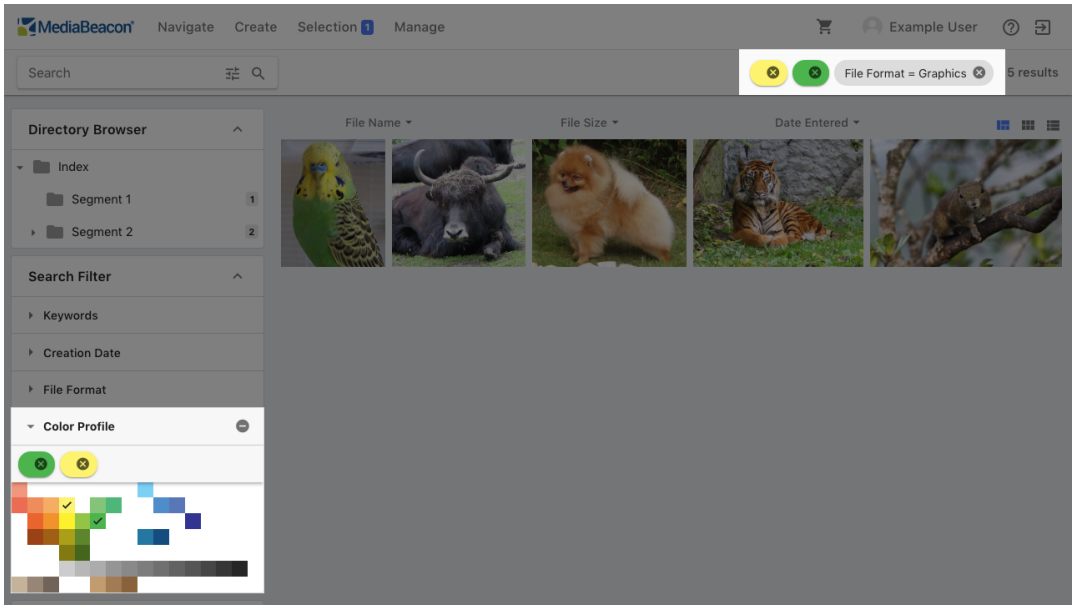
Color Profile



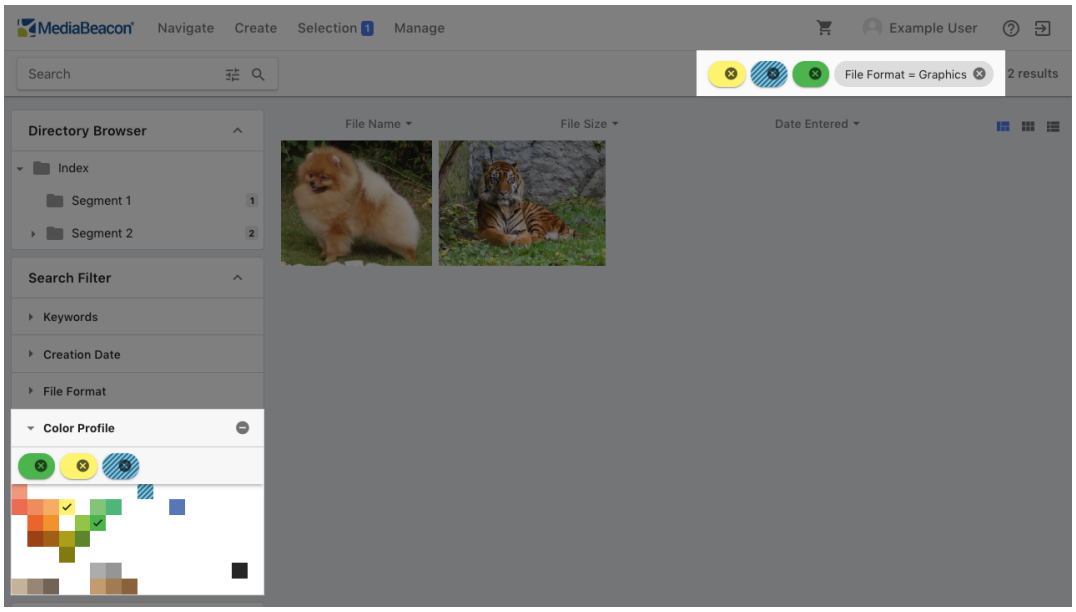
In the Search Filter, this field displays a grid of 112 color swatches. Similar to other Search Filter fields, if no assets in the current view contain a given swatch, those swatches will be hidden.



Each color swatch acts as a value in any other Search Filter field. Click a color swatch (or shift to add it to the search criteria. Multiple swatches may be selected to further refine asset results.

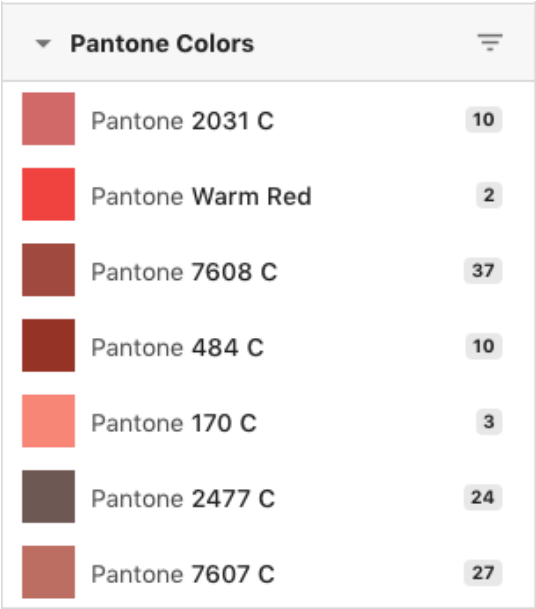


Shift-click a swatch to add a "NOT Swatch" to the search criteria so that the assets that contain a given color are ruled out in the search.

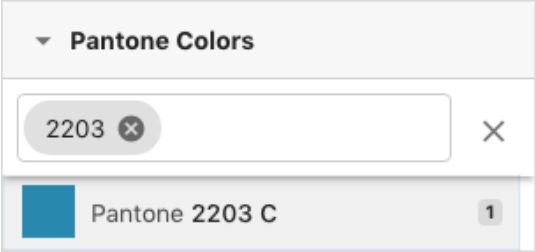


Pantone® Colors

The Pantone® Colors field allows users to filter by Pantone® colors that are near-matches for Color Profile colors.



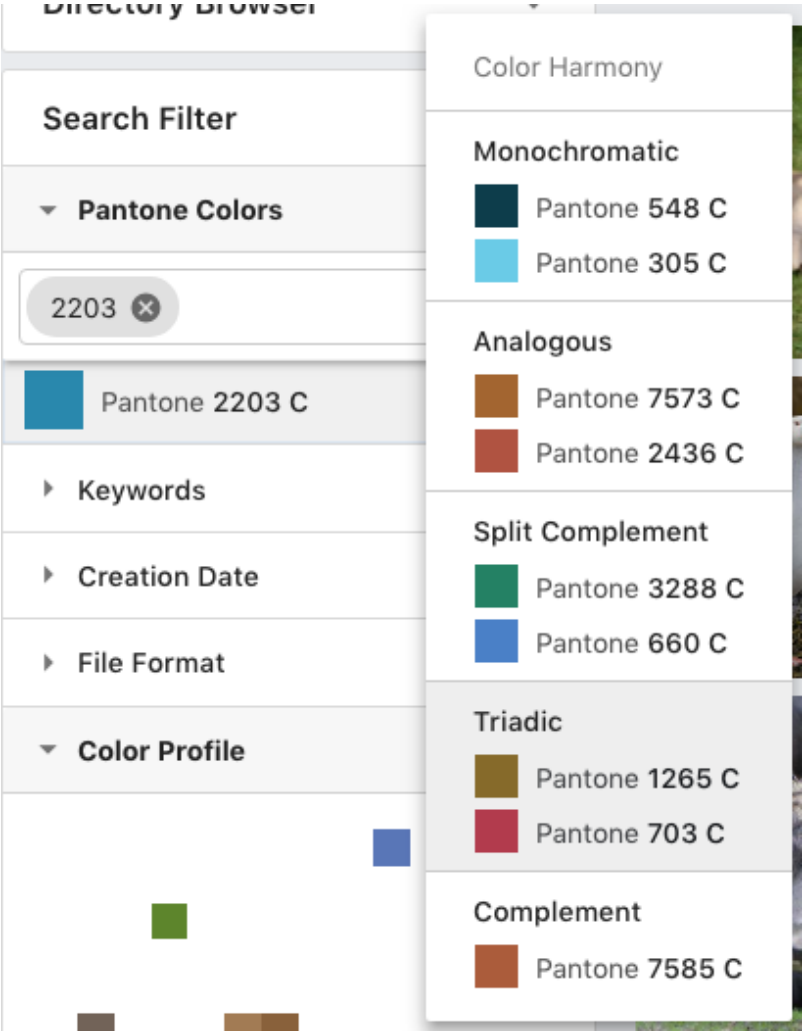
- Assets are automatically tagged with a list of Pantone® colors that represent close matches to the values in an asset's Color Profile.
- The list displays up to 256 Pantone® colors, but a given color can be searched for using the filter function.



- The list of pantone colors is not shown by frequency, but by Pantone® swatch order.
- Clicking on a currently-selected Pantone® color will remove it from search criteria.
- Shift-clicking a Pantone® color will add it as a "NOT criteria". In this case, the value shown in the Search filter will be negative, indicating how many assets are hidden.

Color Harmony

Right-clicking a Pantone® value in the Search Filter will show a menu of color harmonies.

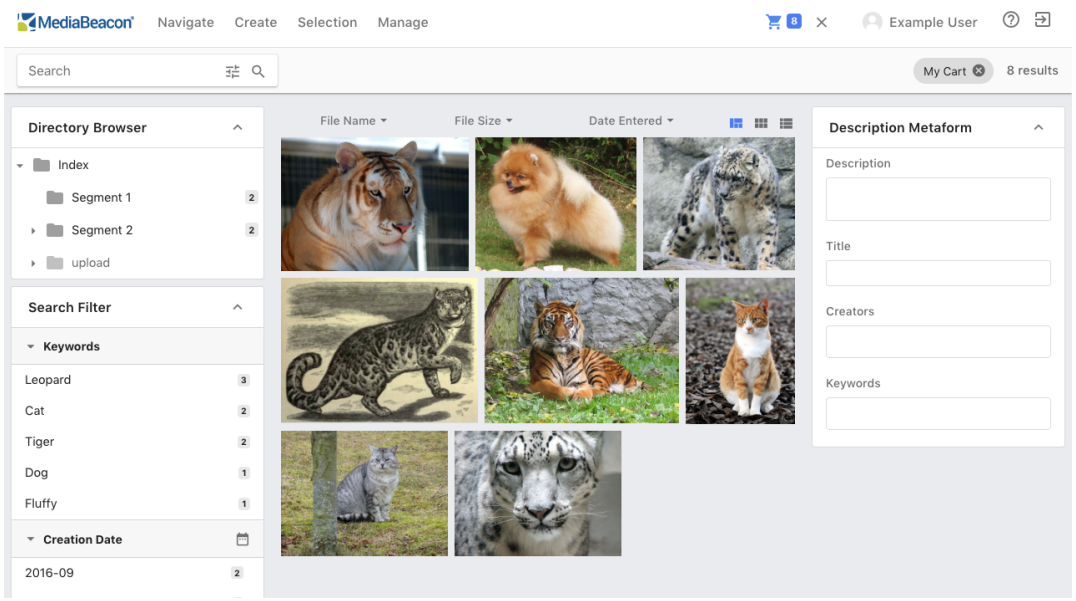


Clicking a harmony will replace Pantone® colors in search criteria with those in the harmony.

3.11.6. Form Component

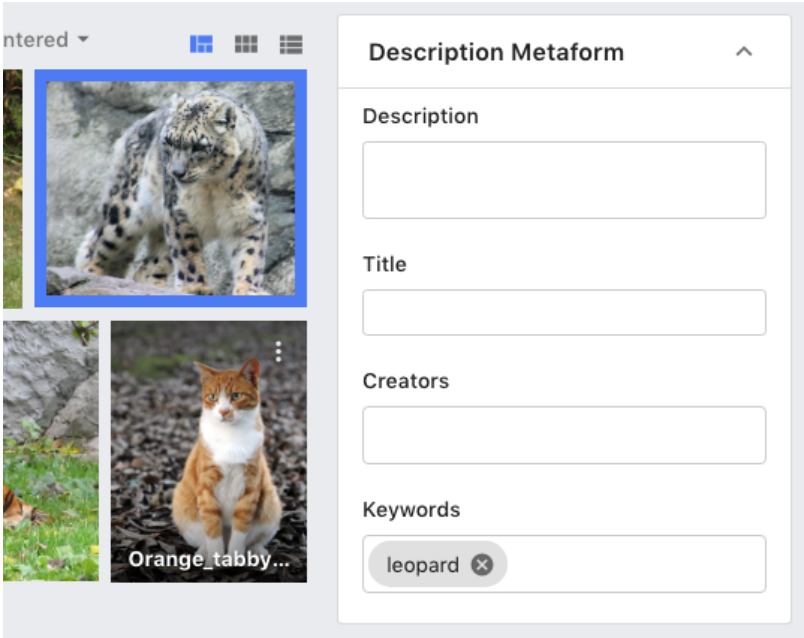
This component is used to display a Form outside the Asset View or Bulk Edit dialog.

The form has no function until an asset selection is made.

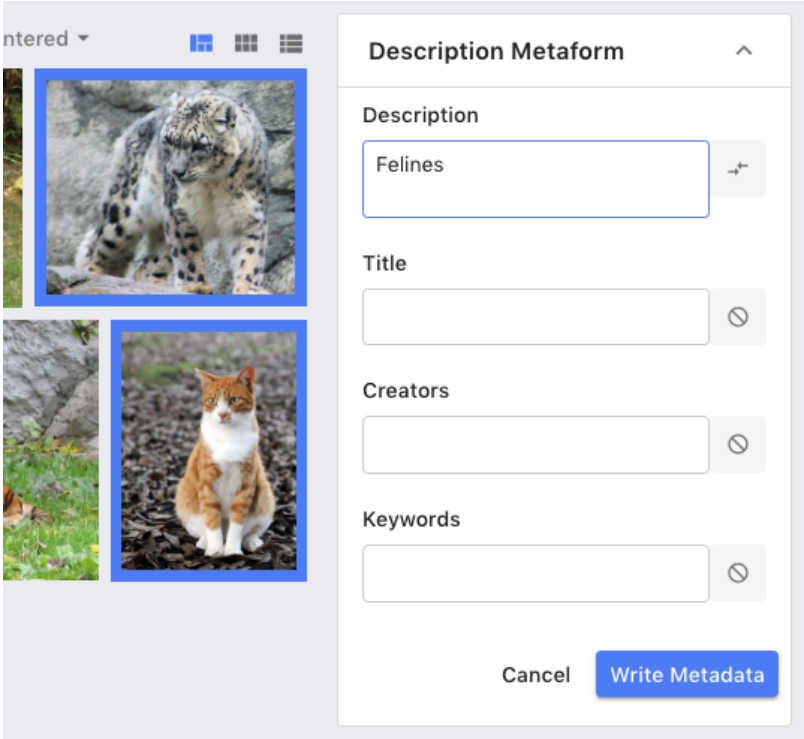


When an asset selection is made, the component allows the user to view and (if the user has permission) to edit them.

- Single asset: When just one asset is selected, the Form will show any metadata that may be resident in the selected asset in that Form, and allow metadata to be edited.



- Multiple assets: In this case, the Form will not show any metadata of the selected assets, but allows the user to write metadata to multiple assets at once, and perform different Field Edit Actions. For more information, see the Bulk Edit section.

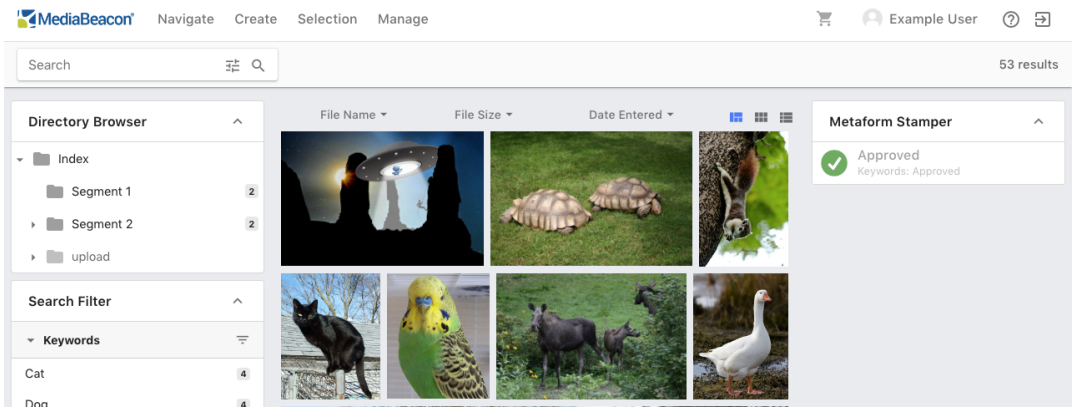


Optional Configuration

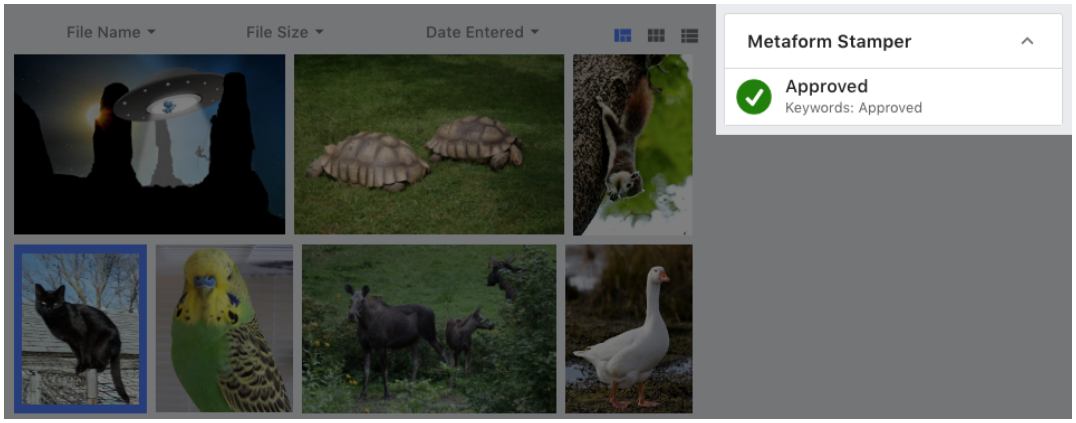
Hidden Form: Optionally, the Form will be hidden until an asset is selected, saving space in the Web UI.

Metaform Stamper

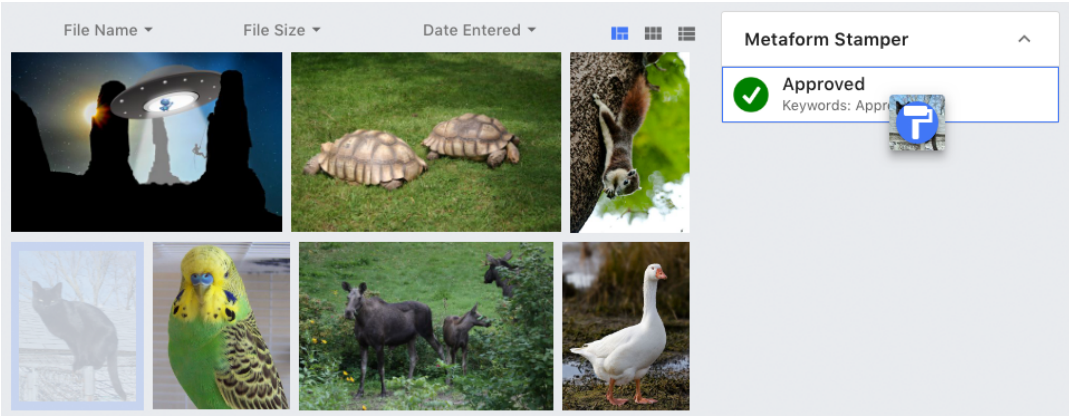
This component allows users to write a predefined set of metadata to one or more assets, like a rubber stamp for metadata.



One or more preset stamp panels are displayed, each with a icon, name and (if enabled as shown above) the metadata to be written. Until a selection is made the stamp will be in an inactive "grayed out" state.

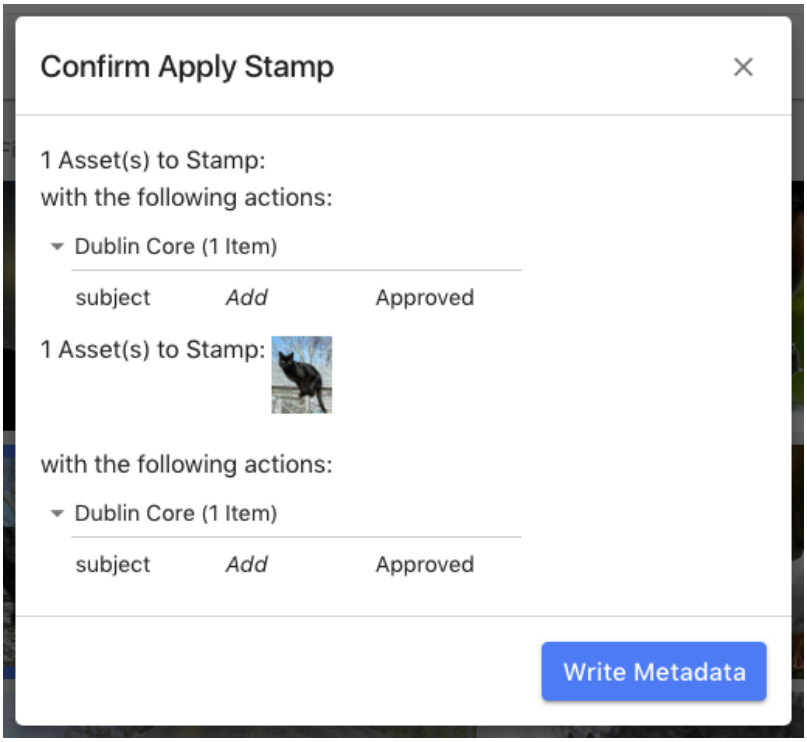


Once a selection is made, stamps become active. The user may click a stamp to write the metadata to the current selection immediately. Alternatively, an asset selection can be dragged and dropped onto a stamp panel to perform the same action.



Optional Configuration

Confirmation Dialog: Displays a confirmation before any data is written.



- Description: Displays the first three fields of metadata to be written.

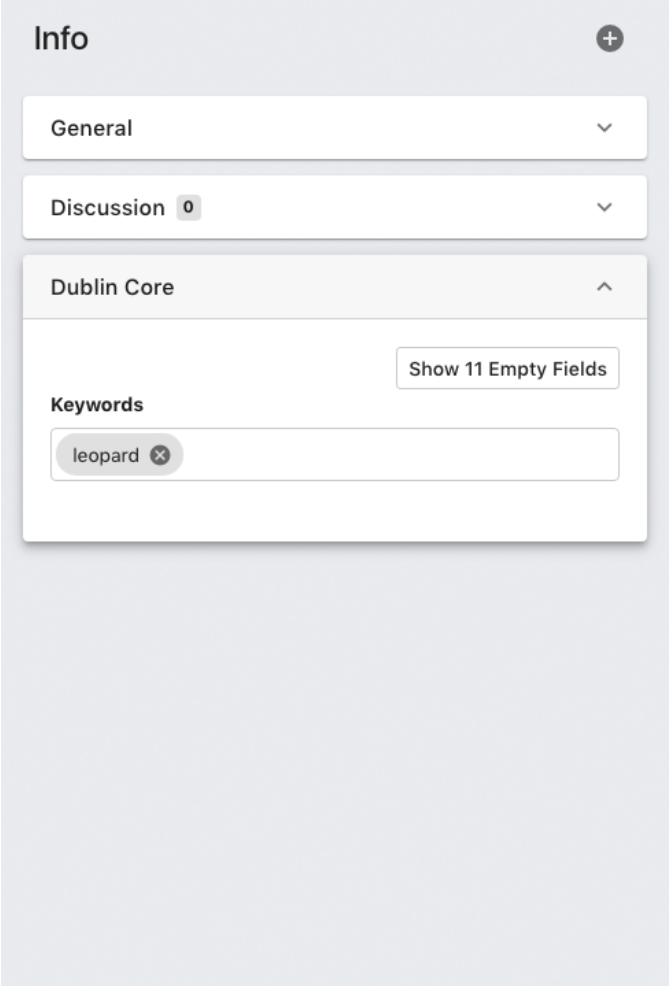
3.11.7. Forms

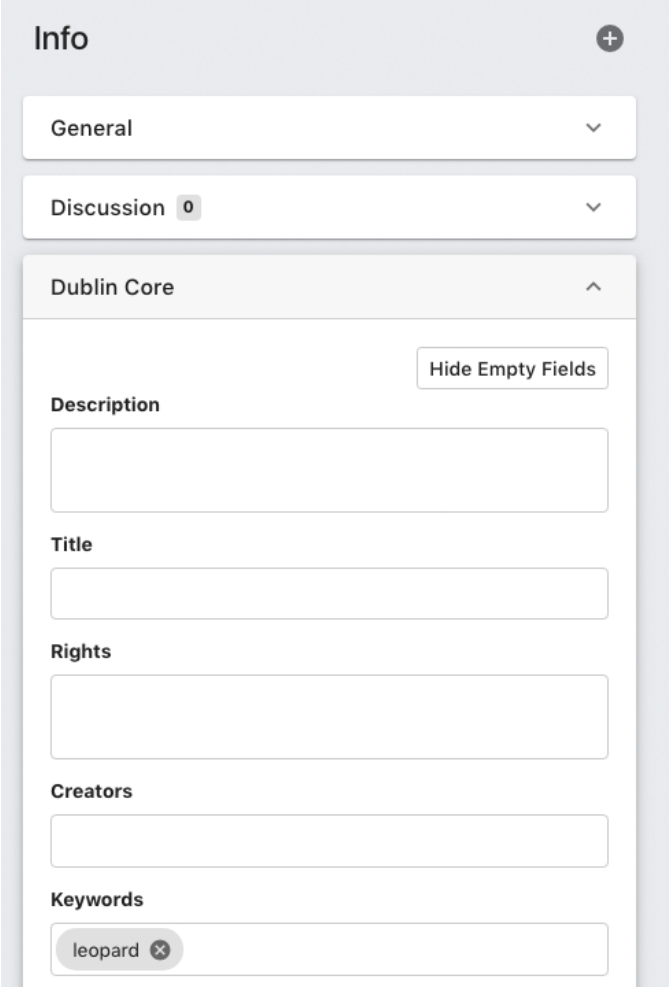
Forms are MediaBeacon's main interface for displaying metadata.

They can display a whole schema of fields, a set of fields from disparate schemas, or have a special display for other types of data.

Data Display and Editing Metadata in Forms

To view the values in a Form, click the named tab, which will open the list of fields. The first time a form is opened, fields that contain no data may be hidden. To display all the fields, click the "Show Empty Fields" button, which reveals all fields in the Form.



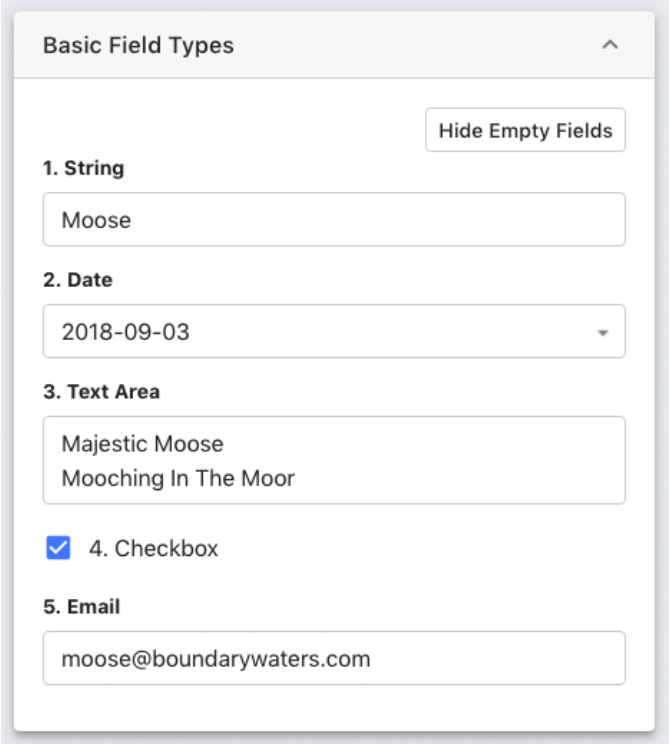


Field Types

MediaBeacon's Forms can use a wide variety of different field types, many of which check the type of data is entered before it's written into an asset.

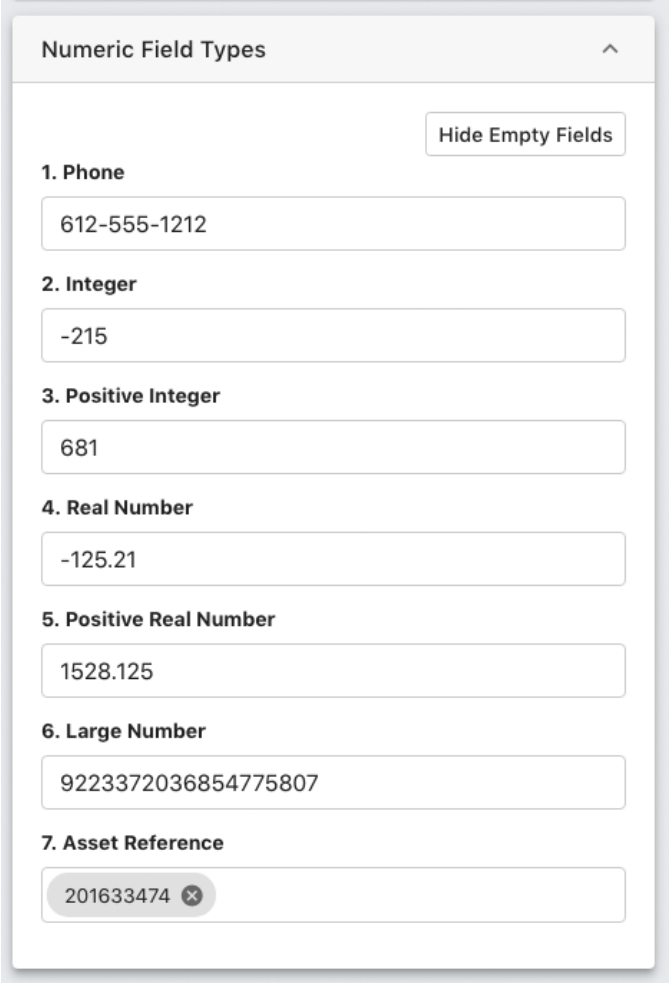
Some field types will **validate** entered data, and alerts the user if the data is incorrect. Validating fields are indicated below with an asterisk (*).

Basic Field Types



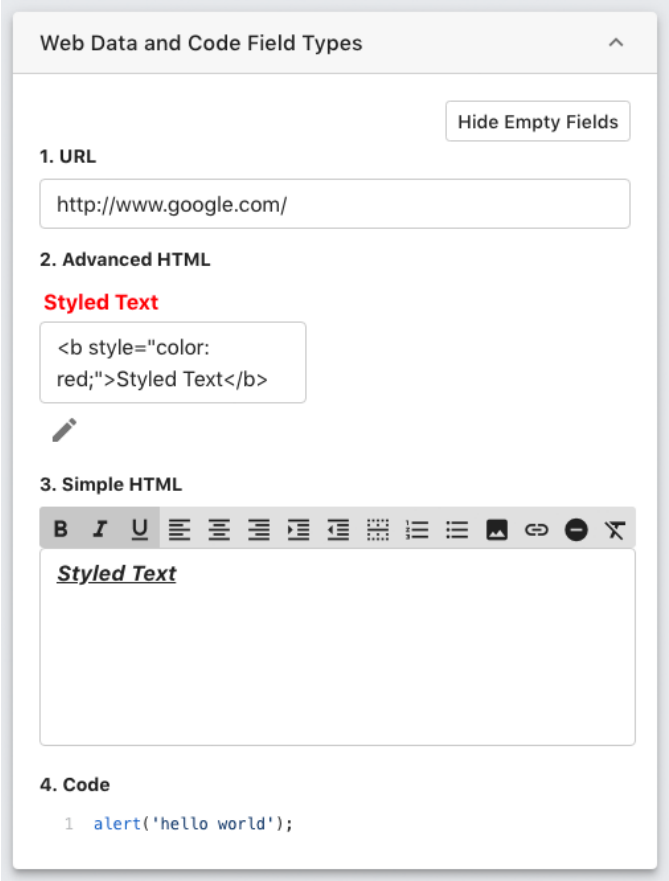
1. **String:** Contains any text string of data, but does not record line breaks.
2. **Date*:** Contains dates in the "YYYY-MM-DD" (*ISO 8601*) format. These fields are indicated by a greyed out "YYYY-MM-DD" and **field action button**, on the right. Dates may be entered manually, or by clicking the field action button to use a calendar picker.
3. **Text Area:** A string field that accepts line breaks, and expands vertically to show all the data recorded.
4. **Checkbox:** This type of field displays a checkbox, which is checked or unchecked.
5. **Email*:** Ensures that the string entered contains an "@" symbol.

Numeric Field Types



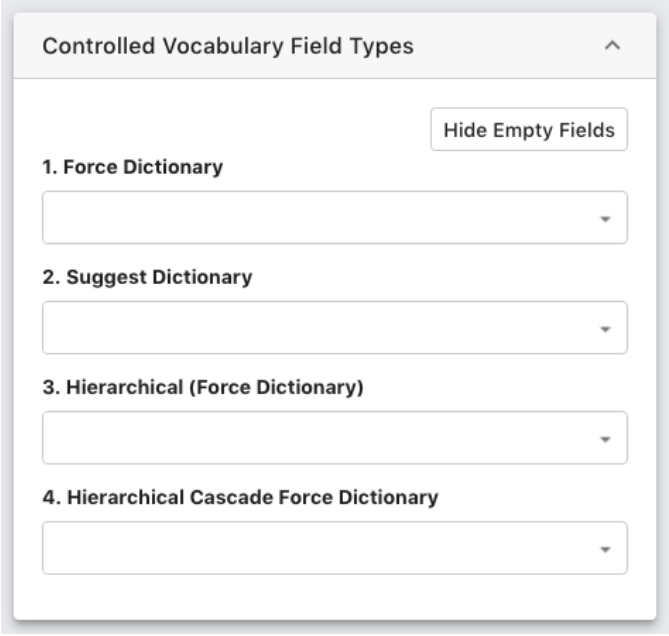
1. **Phone*:** Contains data consisting of ten numeric characters, dashes or periods allowed.
2. **Integer*:** This field type allows a positive integer of up to ten digits, with a maximum value of 2,147,483,647 (the maximum size of a 32-bit signed integer).
3. **Positive Integer*:** As above, but the value may be negative.
4. **Real Number*:** These fields allows decimal values of up to ten digits.
5. **Positive Real Number*:** These fields allows positive decimal values of up to ten digits.
6. **Large Number*:** This field type contains positive integers of up to 19 characters with a maximum value of 9,223,372,036,854,775,807 (the maximum size of a 64-bit signed integer).
7. **Asset Reference***: This field checks that the entered value corresponds to an extant Asset ID. When written, the value is displayed as a hyperlink, which opens the Asset View of that asset in another browser tab.

Web Data and Code Fields

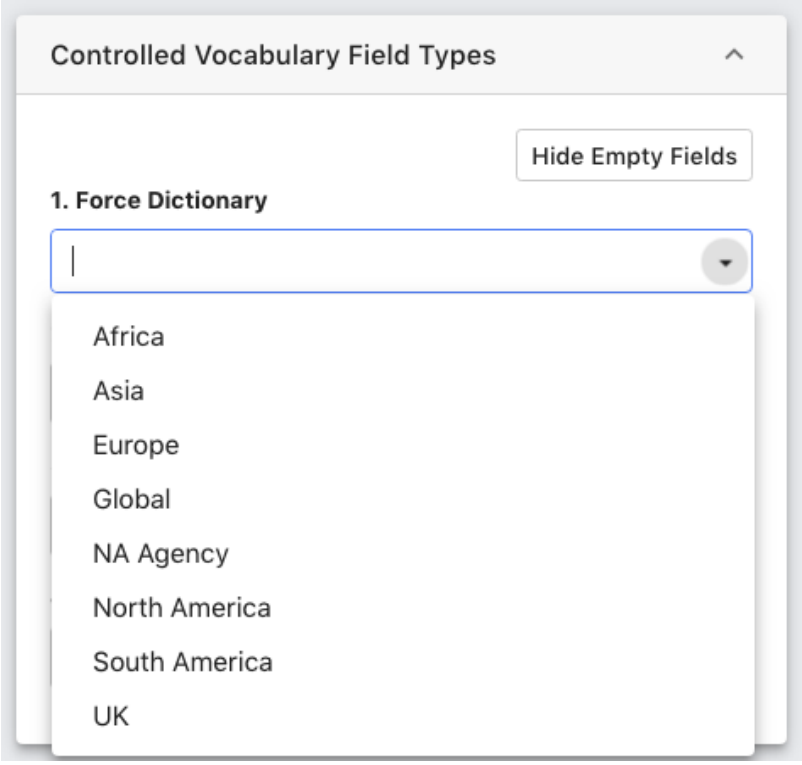


1. **URL*:** This field checks that the entered value is a valid hyperlink, and once written, is displayed as a click-able link. Note: URL resolvability is not checked, just the format.
2. **Advanced HTML**: Allows input of HTML code, showing a rendering of the code above the field.
3. **Simple HTML**: This field allows HTML code to be entered using a WYSIWYG rich text interface.
4. **Code**: This field type displays javascript code with color-hinting.

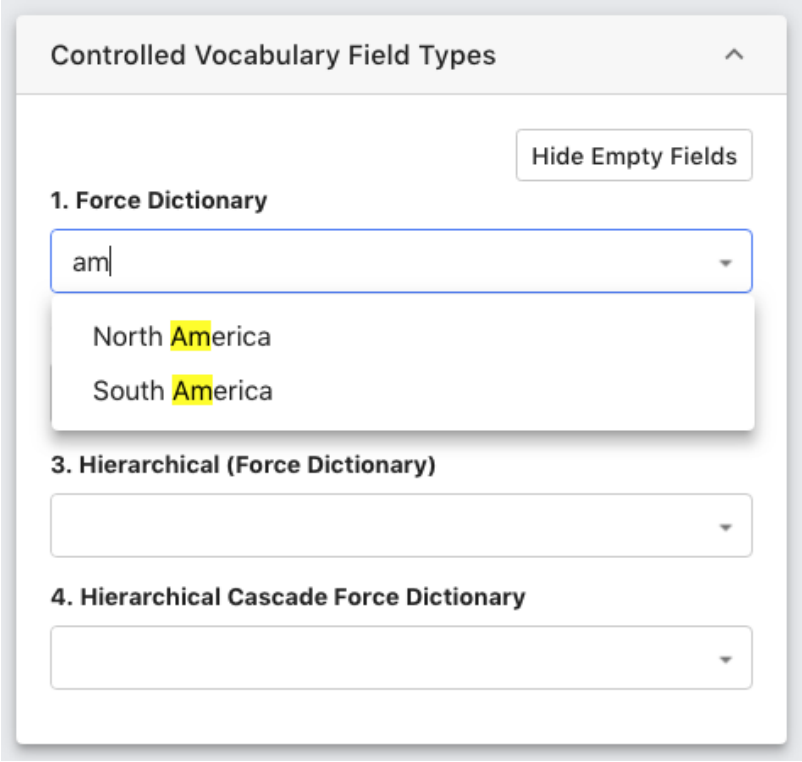
Controlled Vocabulary of Field Types



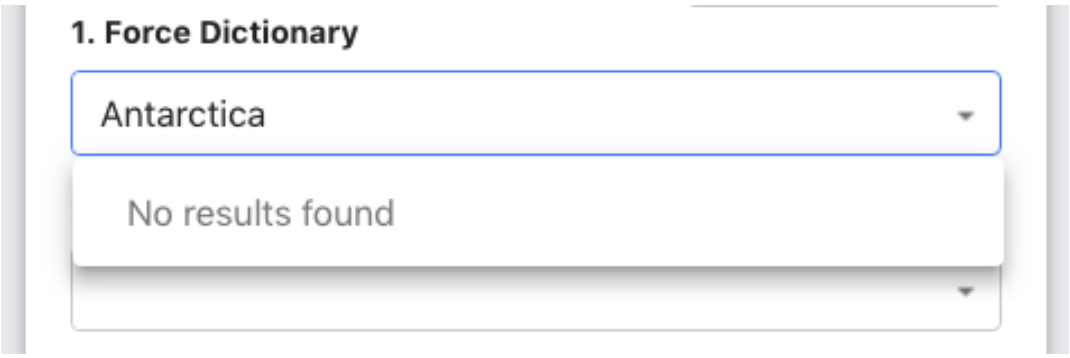
1. **Force Dictionary*:** This field type allows only a value from a predefined list as a valid value.
   a. Clicking on a dictionary field's Dictionary Lookup button displays a drop down menu of allowed values.

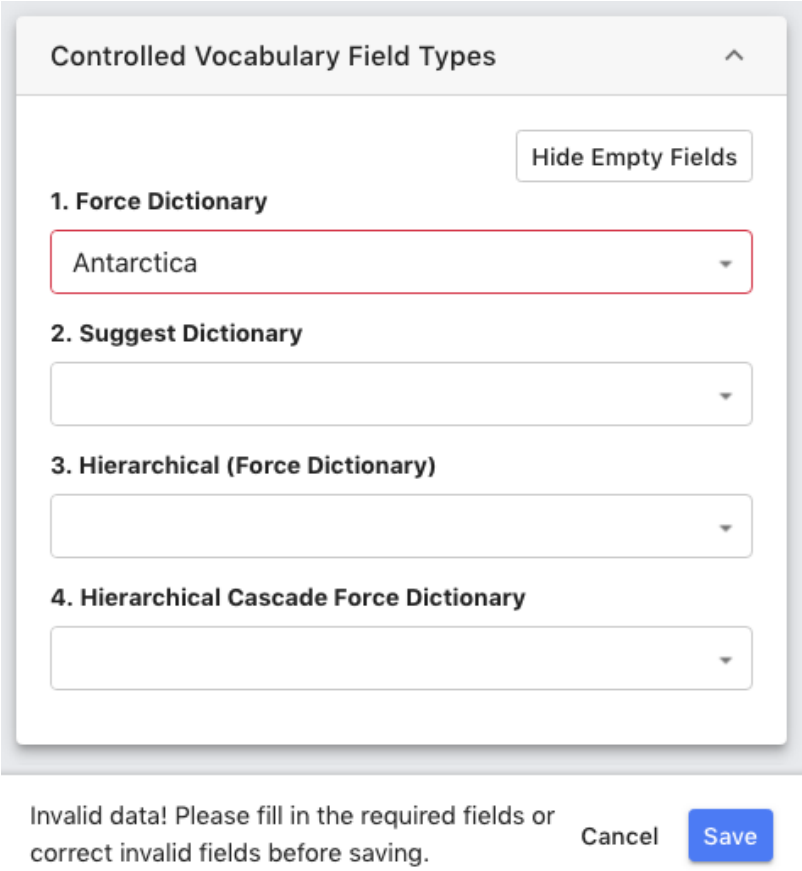


b. The user may also type in part (or all) of a value's name and the dictionary list will be shown, automatically filtering the values.

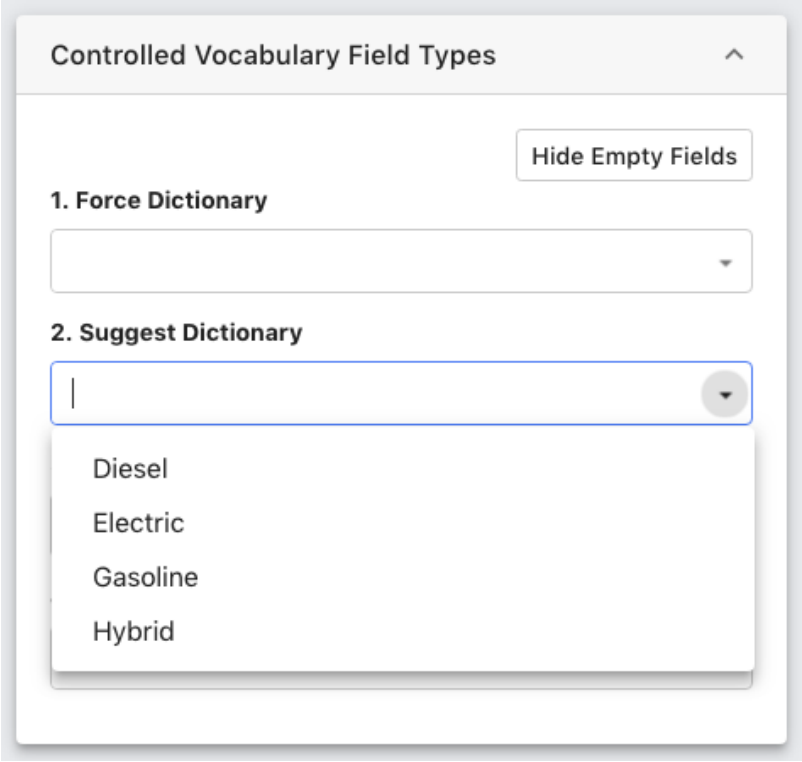


c. The user may click the value or use the up / down arrow keys and the return / enter key to enter the full value.
d. If a value is entered that is not in the dictionary, any metadata edits on the current Form cannot be saved until corrected.

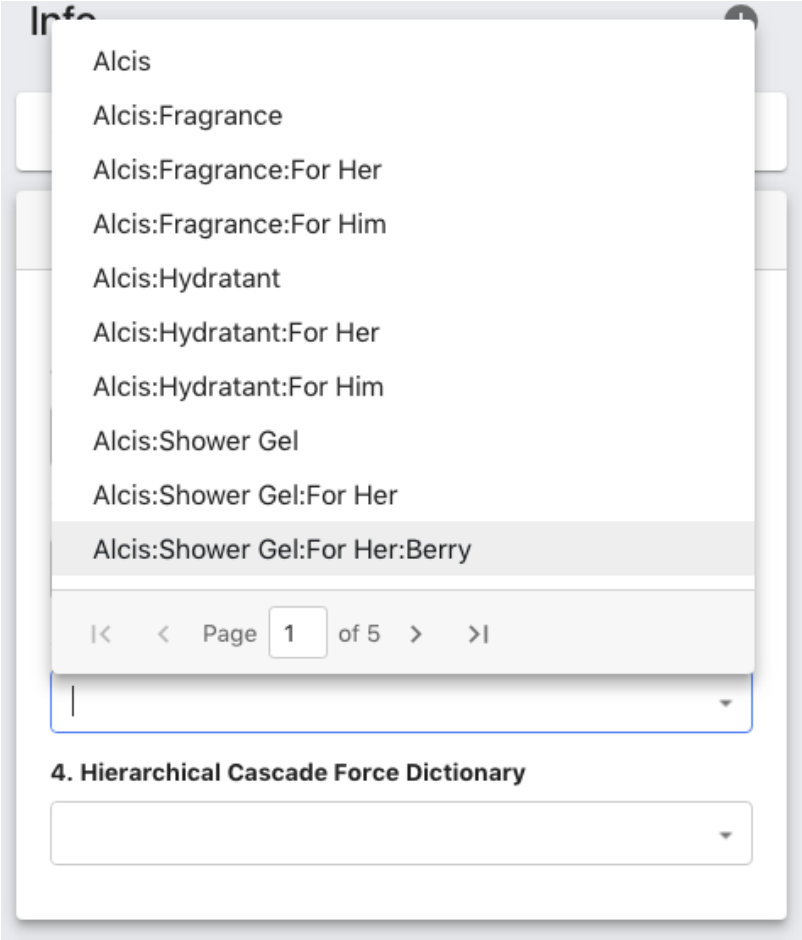


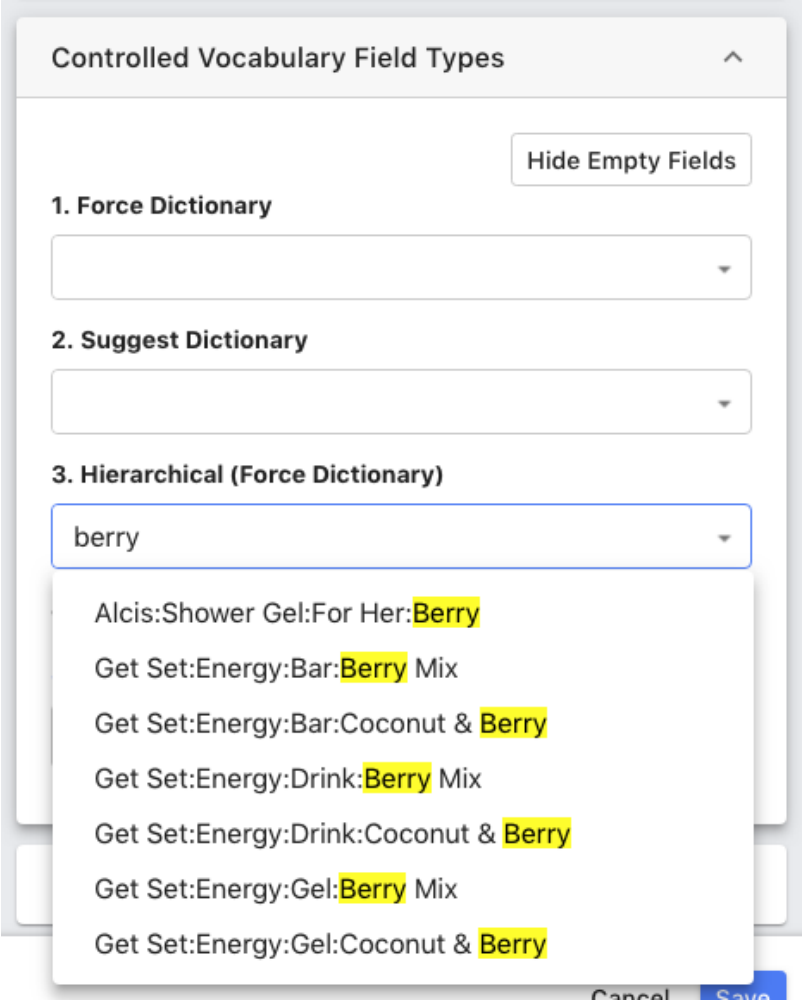


2. **Suggest Dictionary:** Similar to force dictionary fields, these fields will accept any value, but still allow users to choose a predefined value.

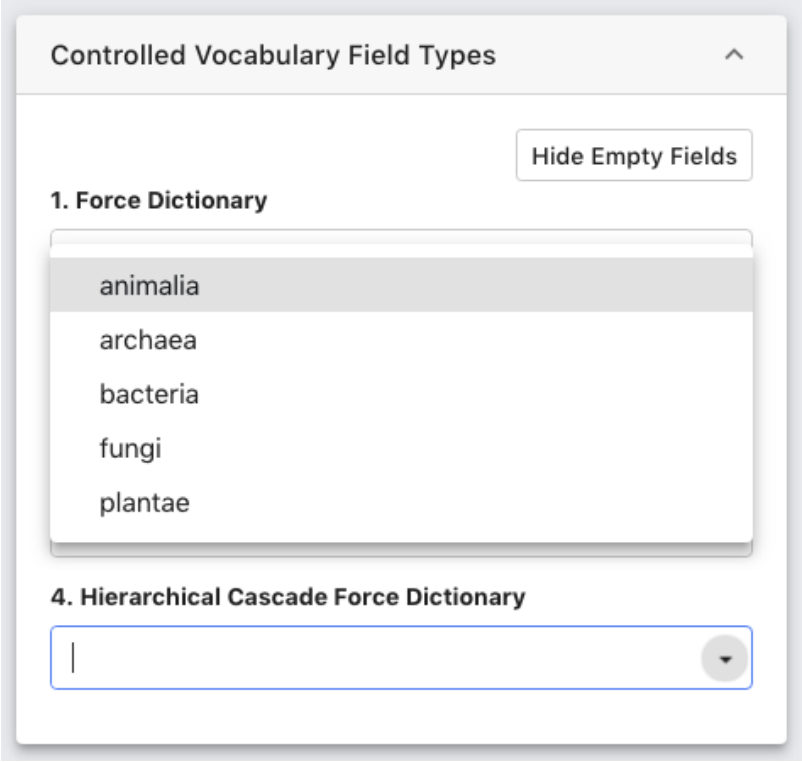


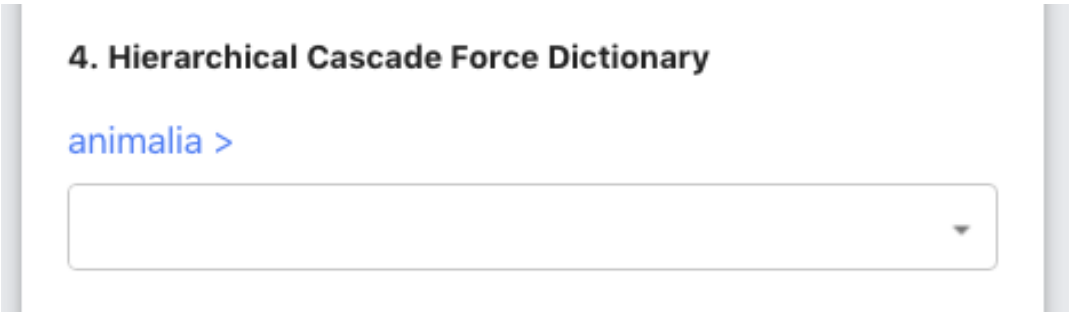
3. **Force Dictionary Hierarchical**: A force dictionary field may be configured to use a hierarchical dictionary.
   a. This data structure places a set of values in a taxonomic structure, geographic data being a good example, having larger regions as containers, or supersets of values:
      a. "Continent", "Country", "State", "City"
      b. North America:United States:Minnesota:Minneapolis
      c. North America:Canada:Ontario:Toronto
      d. South America:Brazil:Santa Catarina:Florianópolis
   b. When an asset is tagged with "Minneapolis", it implicitly will contain the other values in the chain of containing elements, so that asset would be found in any search for those superset terms.
   c. When filling out a hierarchical dictionary field, the pull-down list will contain concatenated terms, separated by colons, as seen above. The type ahead filtering will return any entry that contains the typed string. For example "polis" would return the first and third strings.


Alcis
Alcis:Fragrance
Alcis:Fragrance:For Her
Alcis:Fragrance:For Him
Alcis:Hydratant
Alcis:Hydratant:For Her
Alcis:Hydratant:For Him
Alcis:Shower Gel
Alcis:Shower Gel:For Her
Alcis:Shower Gel:For Her:Berry
Page 1 of 5
4. Hierarchical Cascade Force Dictionary



4. **Force Dictionary Hierarchical Cascade:** A hierarchical dictionary field may be displayed as a cascade element:
   a. Each value on a given level of the dictionary will be shown together in a pull-down menu.
   b. Once a value is chosen, it will be displayed to the upper right of the field, and the pull-down menu now displays the immediate child values of the chosen parent value.



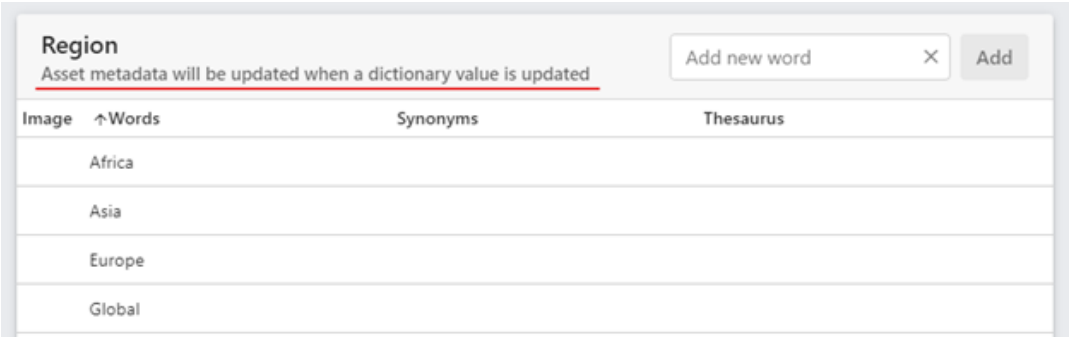


Note: Changing an existing "Word" entry in a dictionary will automatically change the matching value in all assets. This feature is available when a dictionary is attached to a field as a Force Dictionary or as a Suggest Dictionary.

Note: Deleting an existing term in a dictionary will automatically delete the matching value in the assets.

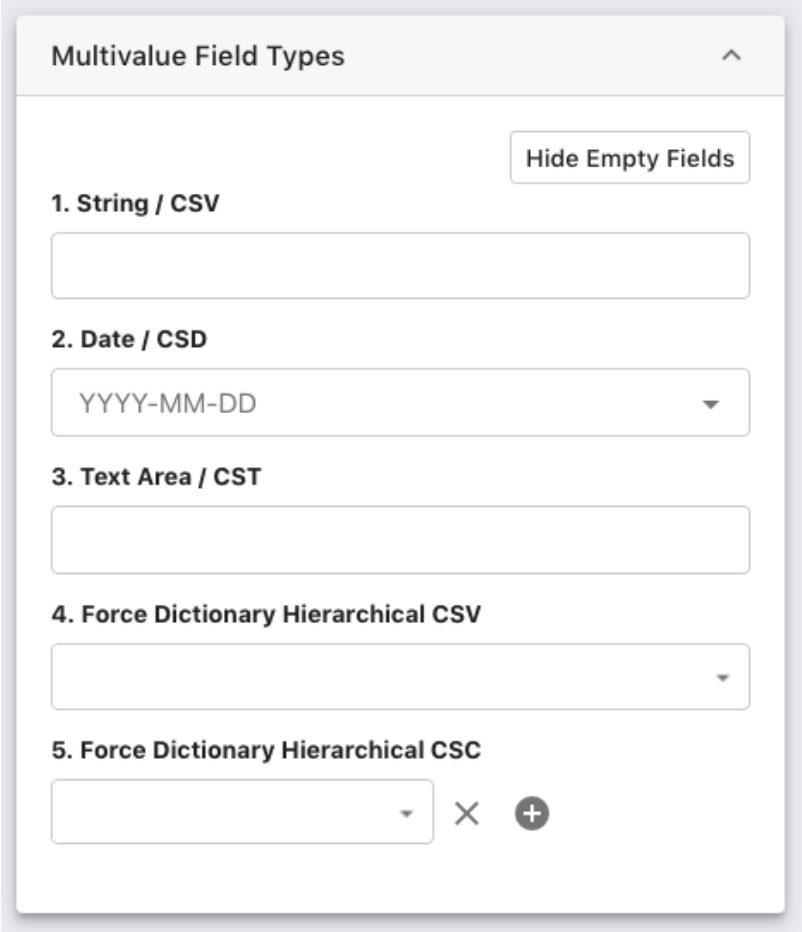
This feature is available only when a dictionary is attached to a field as a Force Dictionary.

Note that these changes occur about 2 minutes after a term is altered or deleted in the Dictionary Dialog



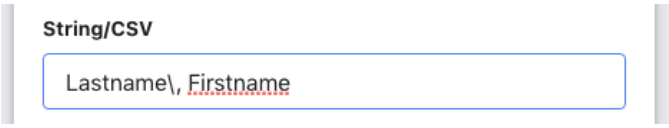
This updating behavior does not occur when a dictionary is deleted or when a dictionary is altered via upload.

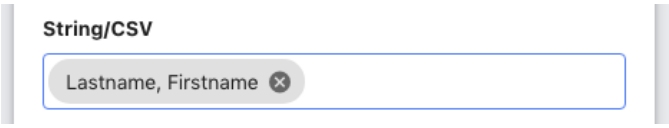
Multi Value Data Field Types



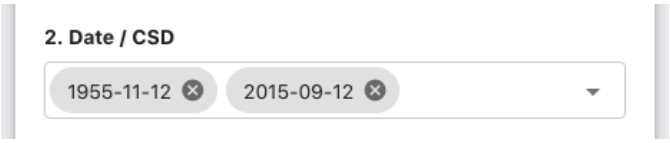
Multi Value (aka Comma Separated Value) fields allow multiple discrete values to be entered in one field. These values are entered as separate terms by pressing the comma key between strings.

Individual values may contain spaces, and even commas, but these must be keyed in with a preceding backslash: "Lastname\, Firstname" = "Lastname, Firstname".

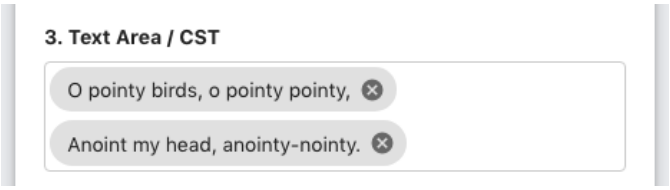




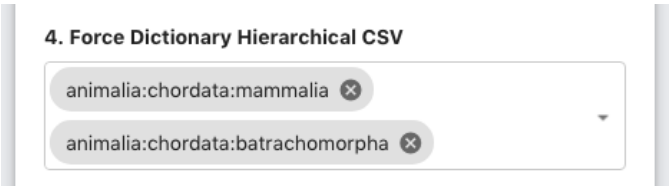
1. **Comma Separated Values**: This field type (as seen above) can be set for:
   a. Basic Field Types: String, Email
   b. All Numeric Field Types
   c. Controlled Vocabulary: Force, Suggest fields
2. **Comma Separated Dates**: Dates only



3. **Comma Separated Text Area**: Allows comma separated text and line breaks



4. **Comma Separated Hierarchical**: Allows multiple hierarchical sets to be entered.

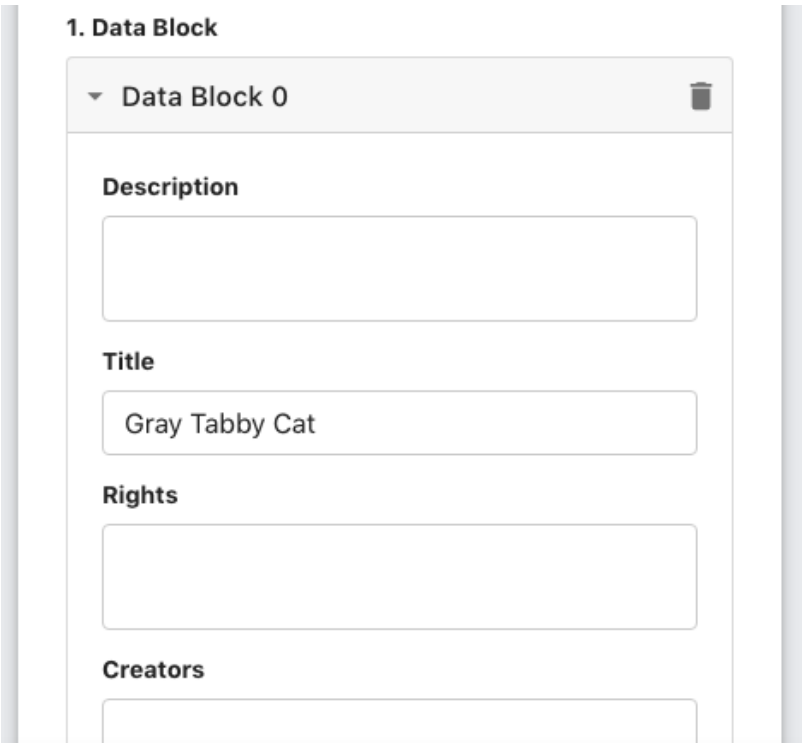


5. **Comma Separated Hierarchical Cascade**: Combines Comma separated values and the Cascade display style for hierarchical dictionary fields.

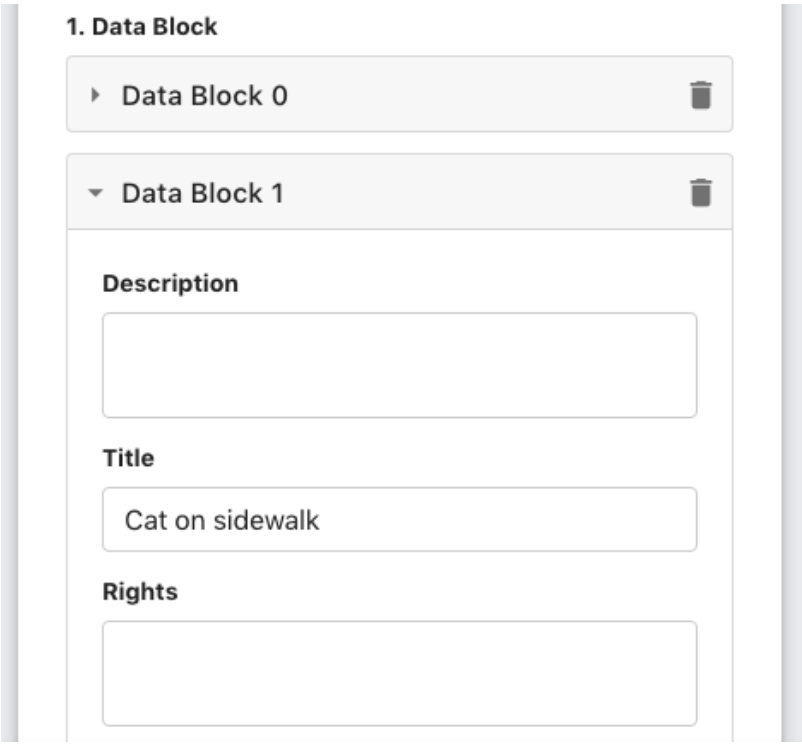
Complex Field Types

1. **Starred Rating:** This field type displays a set of five stars to denote a rating.

2. **Data Block:** Provides a way to make entire Forms into multivalue structures, instead of just individual fields

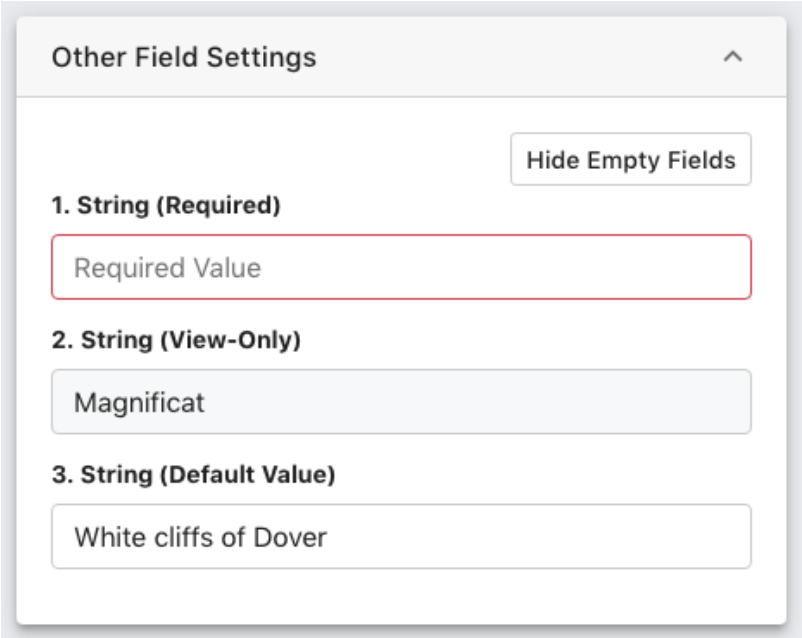


   a. The "Add Block" button adds a spin down tab labeled for the predefined Form and adds a numeric value to the name to denote what order the instances were added.
   b. Each of these Form instances will perform as though they were on separate assets, storing different values in each instance of a given field. When referenced for search, values in an asset's data block will return that asset.



c. A common use of this structure is to record multiple fields of metadata for recurring events, such as each time an asset is printed. In this case, useful fields might be the date of printing, the run length and the colors of ink used.

Other Field Settings



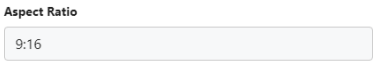
These settings may be applied to any other field type:

1. **Required Fields:** Also known as "Not Empty", any field may be set to require a value. If no value is provided, the Form as a whole will not save any data until the required fields are filled.
2. **View-Only:** These fields may be of any other type and will be greyed out, indicating that the data may not be edited using this Form.
3. **Default Text:** A field may be configured to autofill a given value when the Form is displayed.

Aspect Ratio Field

A new field has been added to hold the asset's aspect ratio in the “MediaBeacon Default” Form. This value is calculated upon upload, and allows searching for aspect ratios values. Buy design it is non-editable.

Best Practices For Use: It is suggested to include this field in user-facing Forms rather than giving end users access to the “MediaBeacon Default” Form.



Keyboard Commands in Forms

- Tab: moves the cursor to the next field.
- Shift-tab: moves the cursor the previous field.
- Return or Enter will save all edits in the current Form.

Saving Metadata Edits

When data has been entered, the "Cancel" and "Save" buttons will be shown at the bottom of the Info panel.

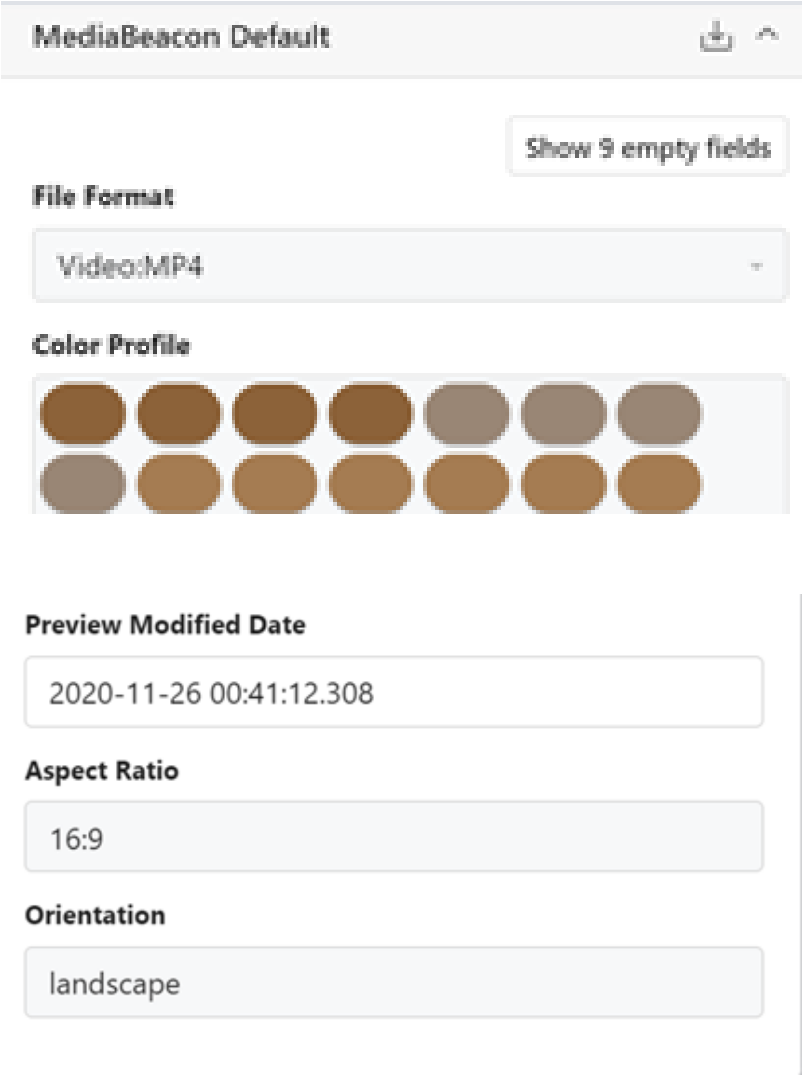
Special Forms

Some Forms have a non-standard display for clarity or to handle non-xmp metadata.

- **General**: Displays some basic information about the asset
  - ID Number (aka Asset ID or Record ID)
- **Discussion**: Displays the Comments and Annotations for the given asset.
- **Document Report**: Displays additional information from InDesign and Illustrator documents, including information about other assets that are placed images within these files.
- **Used in Assets**: Displays other assets within which the given asset is a placed file.
- **Asset Links**: Displays information about MediaBeacon's inter-asset linking function. Note: this is not related to placed files. See the [Asset Links] section for more information.
- **Automatic Versions**: Displays automatic versions of files as defined by Adobe XMP Media Management Properties.
- **Managed Versions**: Displays versions of assets that have been made via the Versioning or Check Out functionality.
- **Video Transcodes**: Displays all the transcodes in the system for a given video asset.

MediaBeacon Default Form

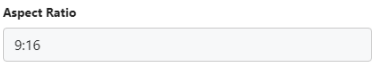
When a video is uploaded in MediaBeacon, it automatically updates Video Aspect Ratio, File Format, Color Profile, Preview Modified date and Orientation to the Default form.



Aspect Ratio Field

A new field has been added to hold the asset's aspect ratio in the "MediaBeacon Default" Form. This value is calculated upon upload, and allows searching for aspect ratios values. Buy design it is non-editable.

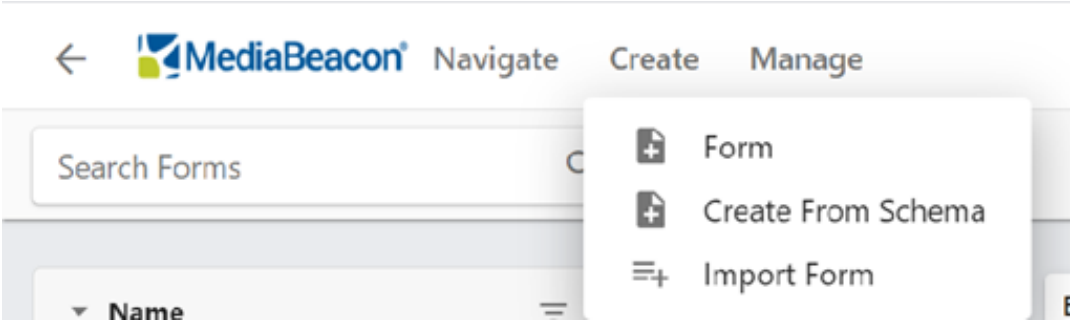
Best Practices For Use: It is suggested to include this field in user-facing Forms rather than giving end users access to the "MediaBeacon Default" Form.



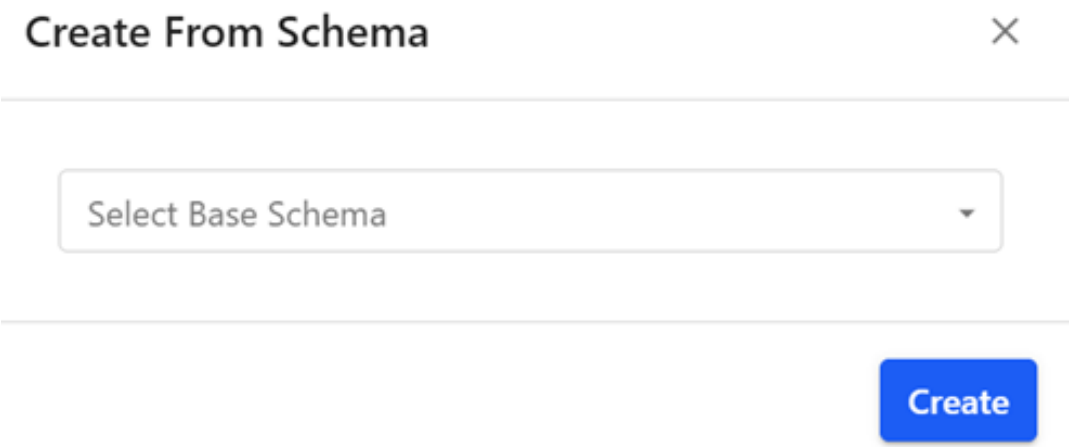
Creating Forms

1. Manage > System

While Creating forms using the "Create from Schema" option, in order to eliminate redundancy, choose a base name before the Create from Schema option.



2. Create -> Create from Schema -> Select Base Schema



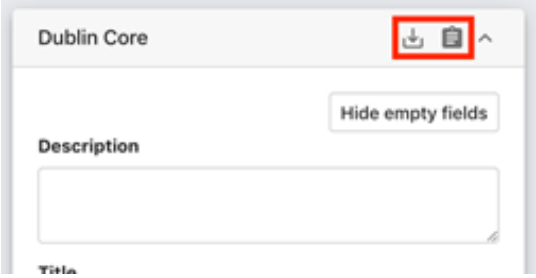
Note:

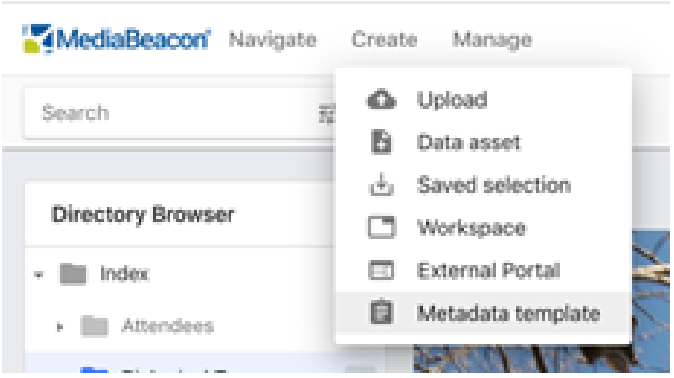
Choose unique names to avoid confusion.

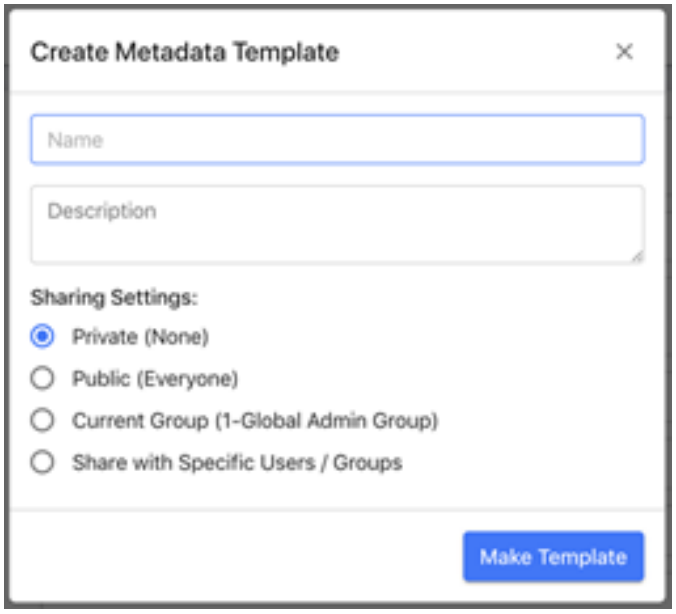
MetadataTemplates

This feature#allows a user to instantly#prefill#one or more#values of a#Form's fields#to a set of preselected values.

Two new buttons#on field-based Form#Tabs, a new menu selection,#and two dialogs#comprise the UI for the feature.







- **Name**: Enter a name for the template.
  - **Description**: Enter a text description for the template.
  - **Sharing Settings**: These settings are similar to the mechanism for sharing Saved Selections.
  - **Private**: Only the user saving the template will be able to see and use the template.

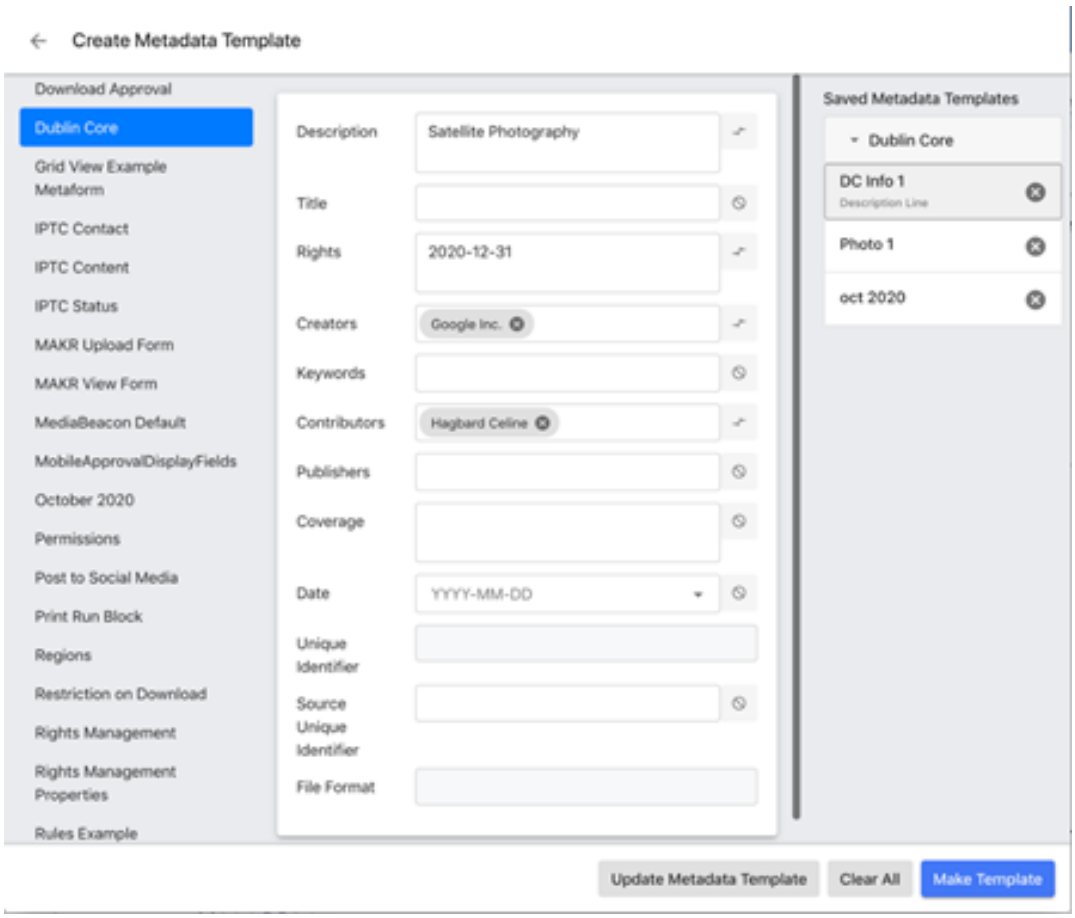
- **Public**: Only Global Administrators will see this option, allowing the template to be seen and used by all system users.
- **Current Group**: Members of the current group will be able to see and use the template.
- **Share#with Specific Users / Group**s: Allows#specific users or groups to be chosen to see and use the template. Note that unlike Share Selections, there is no#option to#Email#users with whom a template is shared.

Note: ACL Permission Restriction: This feature is enabled by default for all users#of an#ACL but#may#hidden#by using the#"Create Metadata Template"#permission restriction.

Choose#either the "Save Metadata as Template" button in a Form's#Tab, or#chooses#Menubar#>#Create > Metadata Template.

This dialog is very similar to the Bulk Edit dialog,#but with a few#differences:

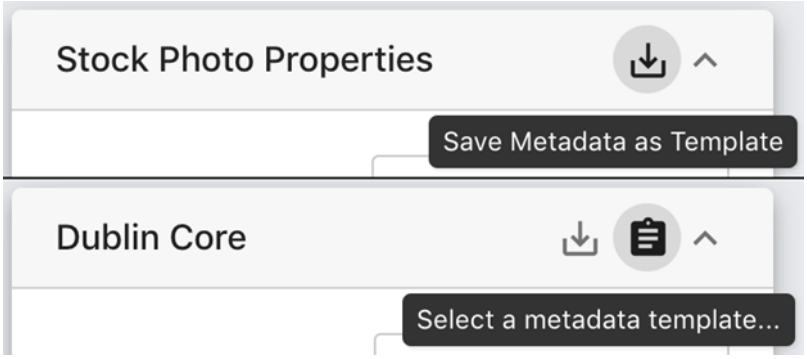
- A list of saved Metadata Templates is present on the right,#and
- Field values from only one#metaform#may be acted upon by a metadata template.



Note: Metadata templates#use#various#operators for field value replacements#in the same way that#the#Bulk Edit#dialog#does. This#means#that a template may clear fields, or remove specific values, and other advanced functions if needed

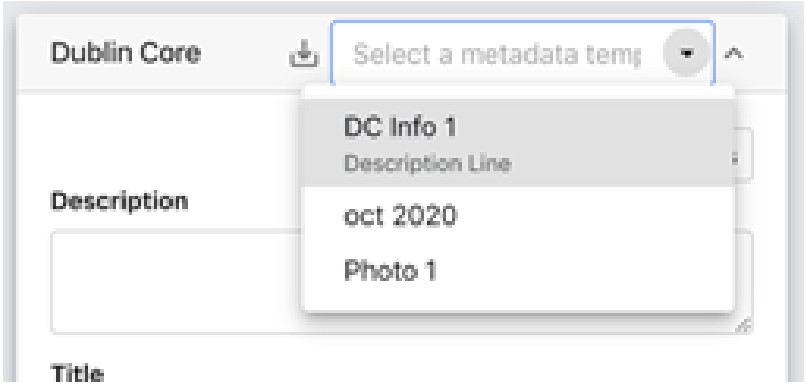
Form Tab Buttons

Buttons have a tooltip to show their names in the UI.

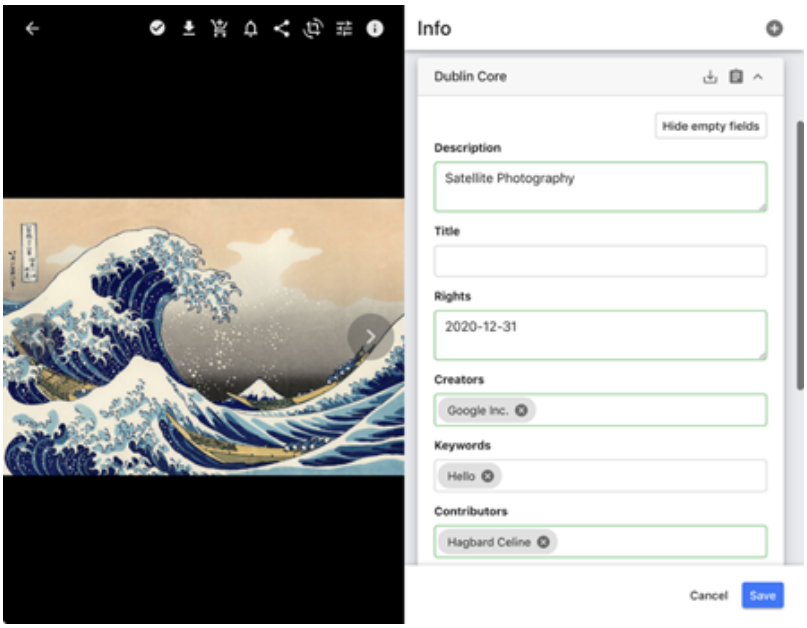


- **Save Metadata as Template**: Allows the current form's values to be saved as a template.#This will open the Create Metadata Template dialog.
- **Select a Metadata Template**:#This icon is only shown when a template is available to the user. When clicked, it will display a list of templates to choose from.

Choose Metadata Template:



When a template is chosen,#the values in the template are#inserted into the Form's fields.



Note: The changed fields are highlighted in green until the Form is saved.

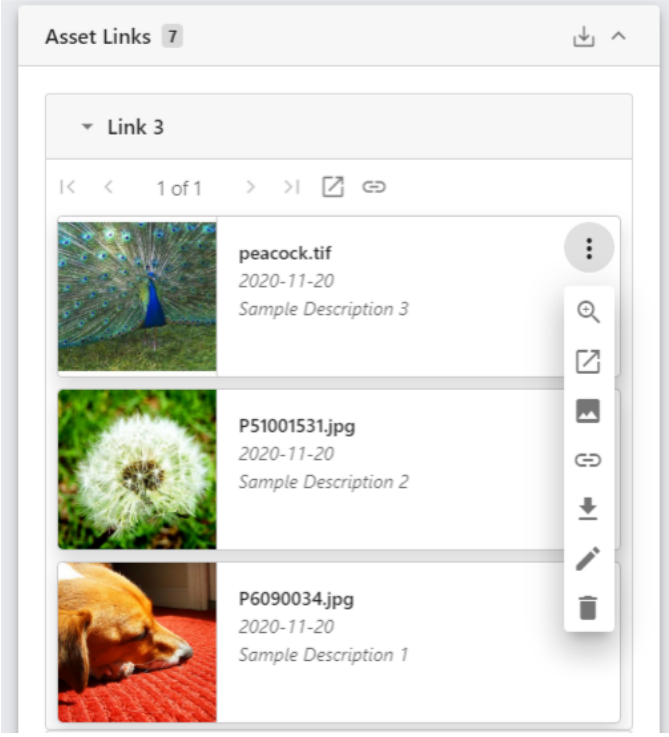
- **Make Template**:#Saves the current template, opening the Create Metadata Template dialog, see below.
- **Clear All**:#Resets the currently displayed form values.
- **Saved Metadata Templates**: Clicking a saved template will show the form, its values and parameters.
- **Update Metadata Template**:#If#a saves#template is displayed and then edited, this button allows the#current#metadata template to be updated, overwriting the older form settings.
- **Delete Metadata Template**(X button to the right of a saved metadata template): Deletes that template#permanently.

3.11.8. Standardized Associated Assets UI

This feature standardizes the display of varied types of "associated assets." Those seen in the Asset Links Form, Document Report Form, Managed and Automatic Versions Forms use this new UI type.

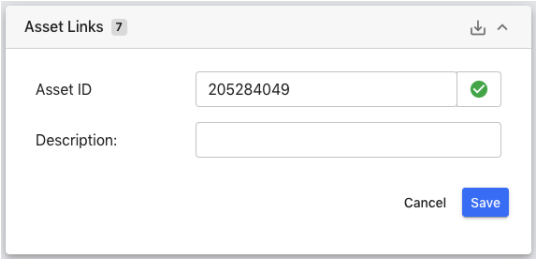
The interface now displays associated assets as a list of horizontal panels, with pertinent information shown to the right. When any item is moused over, a vertical ellipses icon is shown, allowing the user to access a contextual menu with commands for each type of associated assets.

Asset Link Form Associated Asset Contextual Menu

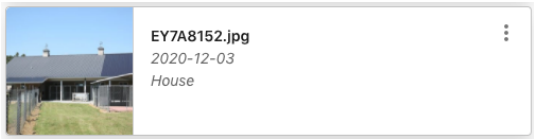


Asset Link Form Associated Asset Contextual Menu

- **Asset View**: Opens the Asset View for the linked asset.
- **Open in New Window**: Opens the Asset View for the linked asset in a new window/browser tab.
- **View Original**: Opens a new browser window/tab to display the original asset. This is only possible with asset formats that a browser can display (jpg, gif, png, etc), otherwise the original asset will be downloaded.
- **Copy Link**: Copies a direct URL link to this asset into the user's clipboard.
- **Quick Download**: Downloads the original asset.
- **Edit Link**: This command allows the user to change an asset link by choosing a new Asset ID. This interface makes use of the Asset Reference Field Searching functionality (see below).



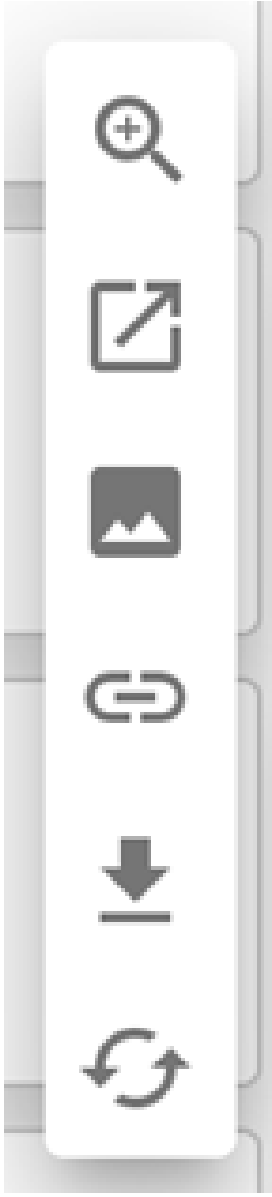
A description may be added that will be displayed on the Associated Asset Panel.



Delete Link: Removes the Linked Asset from the Asset Links Form. Both assets are otherwise unaffected.

Note: If the asset in question is under the "Placed Images" heading, it will not be removed, as this is administered under the Document Report Form.

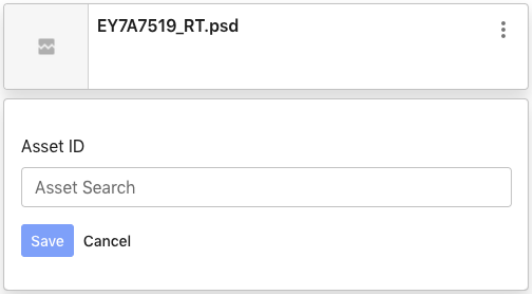
Document Report Form (Placed Images) Associated Asset Contextual Menu



- **Asset View**: Same function as in Asset Links Form.
- **Open in New Window**: Same function as in Asset Links Form.
- **View Original**: Same function as in Asset Links Form.
- **Copy Link**: Same function as in Asset Links Form.

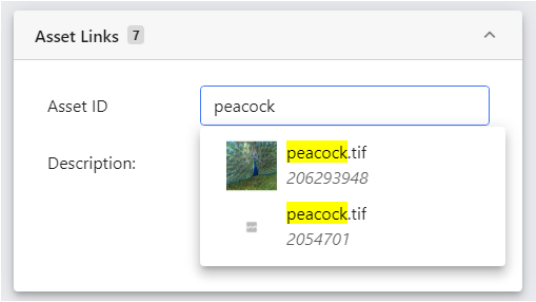
- **Quick Download**: Same function as in Asset Links Form.
- **Update Linked Asset:** This command opens an inline Asset Search panel, containing an Asset

Reference field (See Asset Reference Field Searching, below) allowing the user to specify a replacement images if necessary.

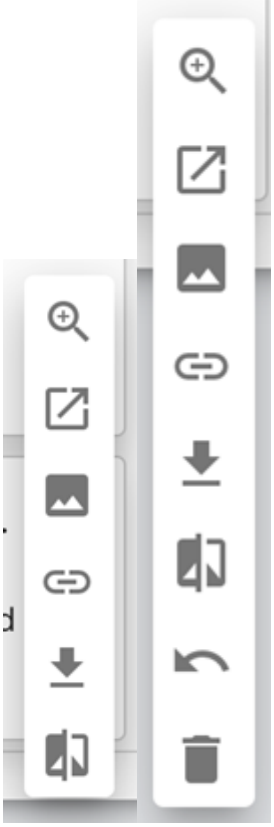


Asset Reference Field Searching

This feature enhances the Asset Reference field, found wherever an Asset ID (aka Record ID) can be entered. Now, the dropdown will perform a search and display results not only of Asset IDs, but also of filenames. This applies to both built-in Forms, but also admin-created forms that use the Asset Reference field type.



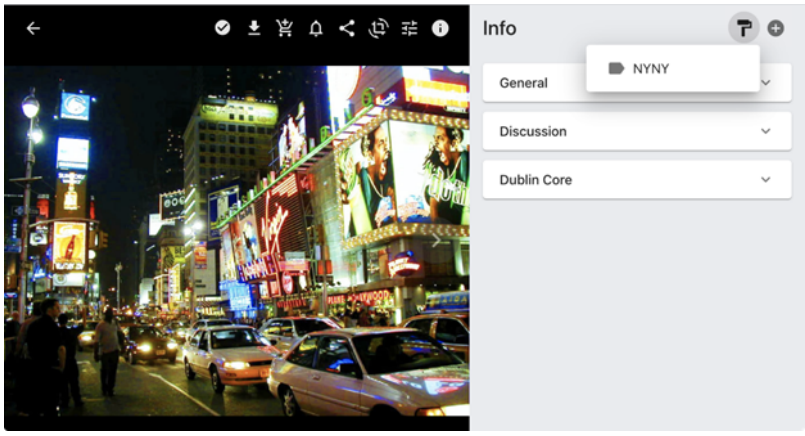
Automatic and Managed Versions Forms Associated Asset Contextual Menu



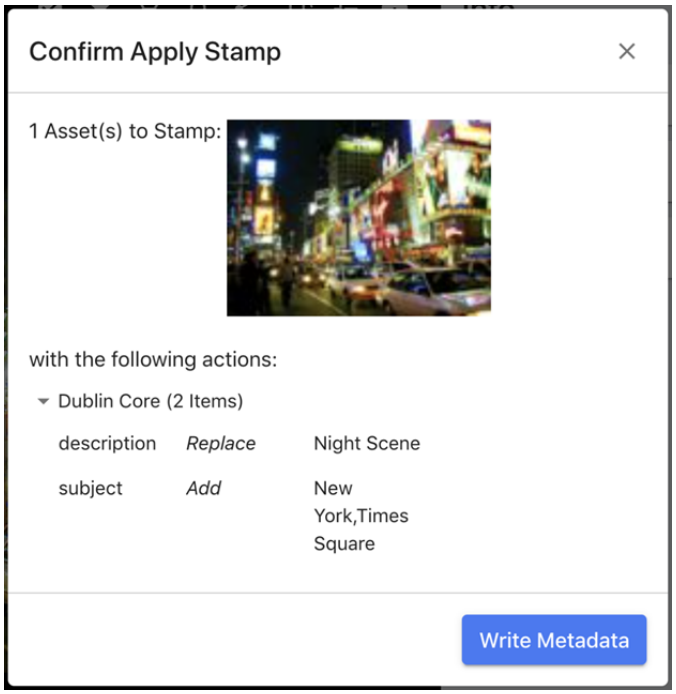
- **Left to right:** Automatic Versions contextual menu, Managed Versions contextual menu.
- **Asset View:** Same function as in Asset Links Form.
- **Open in New Window:** Same function as in Asset Links Form.
- **View Original:** Same function as in Asset Links Form.
- **Copy Link:** Same function as in Asset Links Form.
- **Quick Download:** Same function as in Asset Links Form.
- **Compare:** Opens a dialog showing each asset and a "Difference" comparison, emphasizing which pixels have changed between the two versions.
- **Promote to Current Version (not shown in Automatic Versions):** This command makes an older version the current version of the asset.
- **Delete (not shown in Automatic Versions):** Same as Asset Links form.

3.11.9. Metadata Stamper

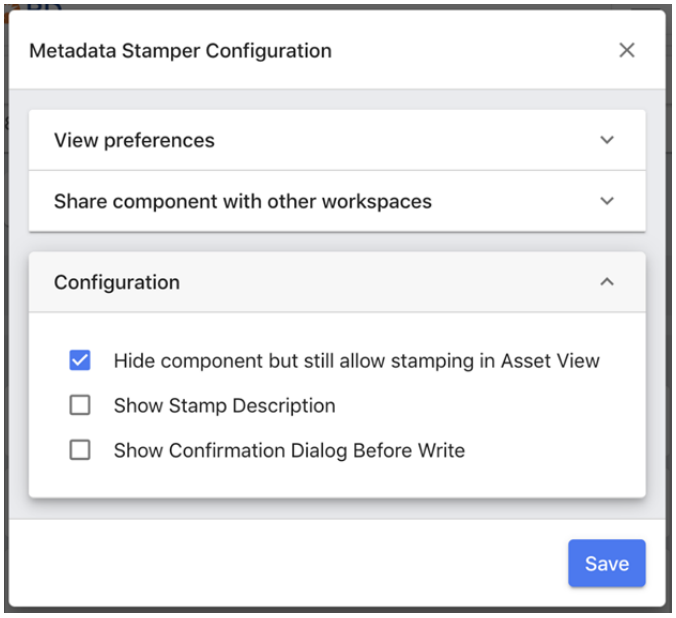
The metadata stamper component has a new option to display a menu of available stamps at the top of the Asset View's Info Panel, hiding itself from the general user while in this state.



Once a user chooses a stamp, the stamp confirmation dialog is displayed as normal to write the metadata.



The option to configure this feature ("Hide Component but still allow stamping in Asset View") is in the component configuration dialog.



3.12. Collect

This section covers the suite of functions that are available for collecting groups of assets in MediaBeacon.

Using search functions can be considered a way to collect, but the topics here deal with ways of making "picks" of assets that have varying levels of downstream re-use.

3.12.1. Asset Links

An Asset Link is an arbitrary association between two or more assets, based on Asset IDs.

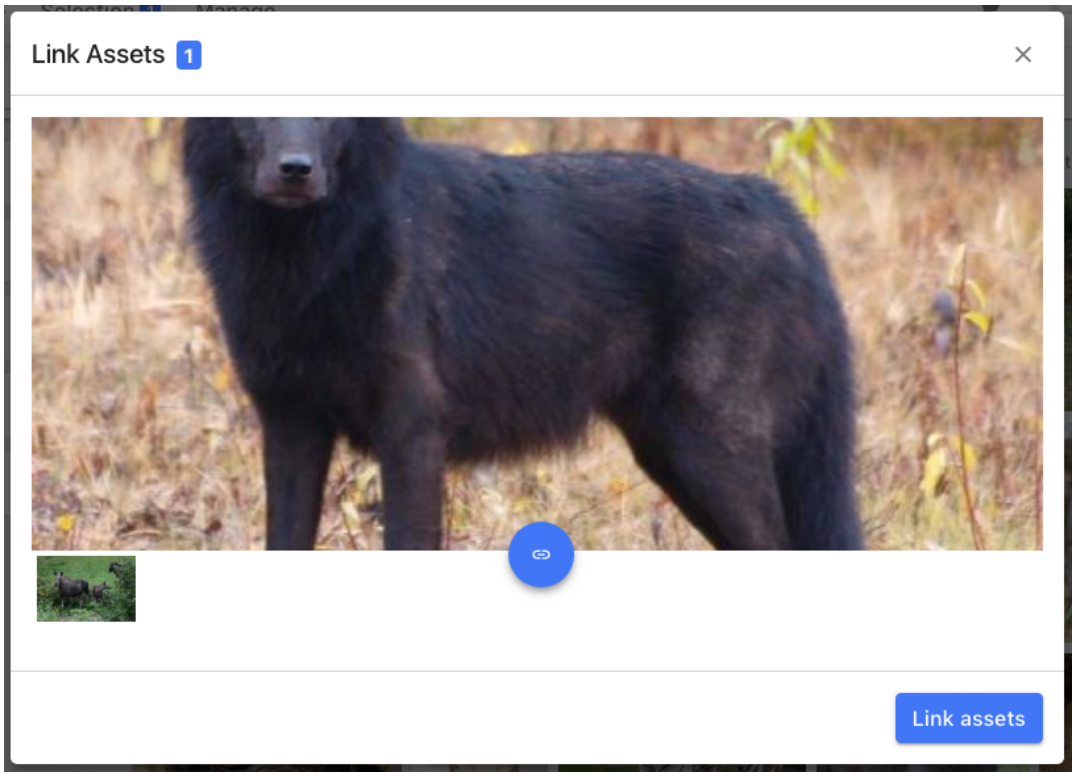
Asset Links are not always the recommended way to associate assets, because Asset ID values are not directly manipulable by users, and asset links are not searchable.

The asset linking function must be enabled by a system administrator to be used.

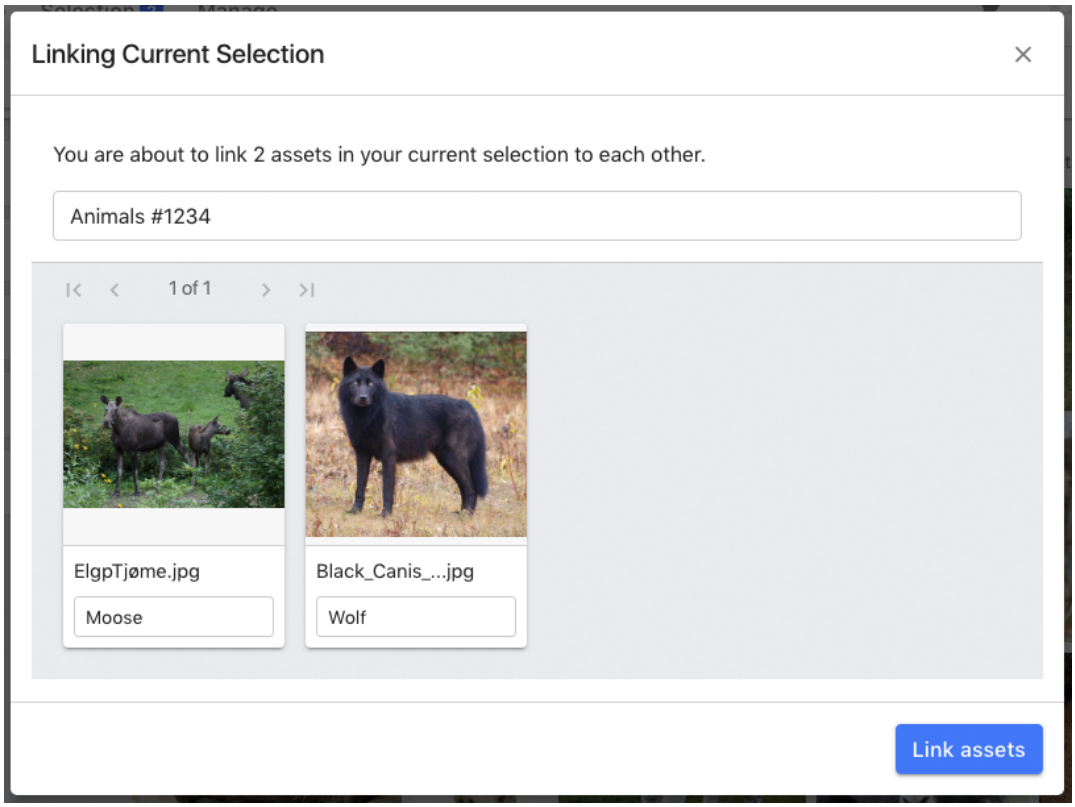
Linking Assets

Assets can be linked using several methods:

- **Drag and Drop:** Dragging assets onto other assets creates an ungrouped link.



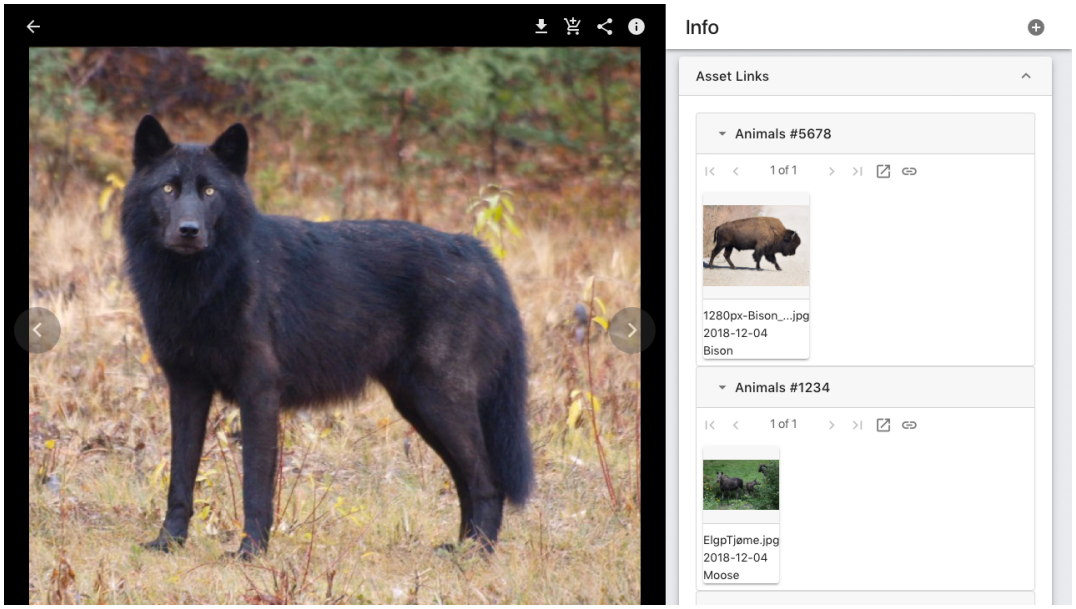
- **Menu Command:** When a selection of two or more assets is made, choosing the "Selection > Link assets" command will open the Linking Current Selection dialog. See Named Linksets, below.



- **Global Link Description**: Optionally adds a linkset name
- **Link Description**: Optionally adds a label for each asset in the linkset.

- **Upload:** A view component can be configured to allow linking assets upon upload.

Asset Links Form Tab



Displayed in the Asset View, this special Form shows other assets to which the current asset is linked.

The view is split into several linkset sections, Ungrouped Links, and any number of Named Linksets. Each of these subsections has similar interface controls:

- **Linkset Name**: defined by "Global Link Description", see above.
- **Header Controls:** at the top of each linkset.

- **Pagination:** This panel can be paged through, similar to the Tile View if many links are present.
- **Show in View Component**: This button will close the Asset View, and display all assets listed in the linkset in the current view component.
- **New Link** : Allows an asset to be added by entering a valid Asset ID. A description may also be entered.

- **Asset Actions**:Refer *Standardized Associated Assets UI*

Named Linksets

When a link is created with the Linking Current Selection dialog, a "named linkset" is created. The name of that linkset can be entered as well as descriptions for each asset.

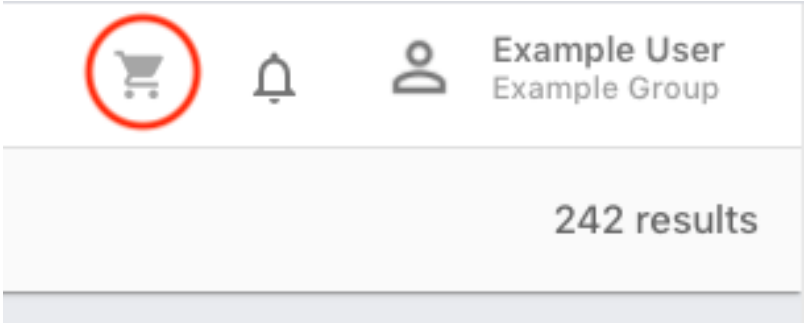
Ungrouped Links

This panel shows all assets that are linked with this asset, using an ungrouped (unnamed) asset link. Drag and drop and upload links appear this way.

3.12.2. Cart Component

The Cart component (formerly the **"Scratch Basket"**) is a temporary, private, saved selection designed as a fast way to collect assets for later use.

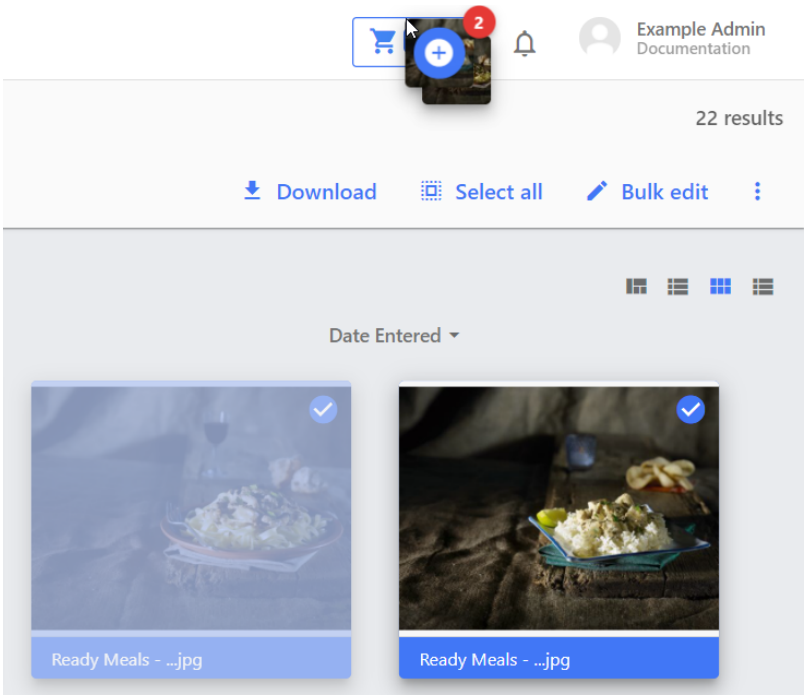
The cart component is usually displayed in the Menu Bar, to the left of the User Menu and Notification Menu.



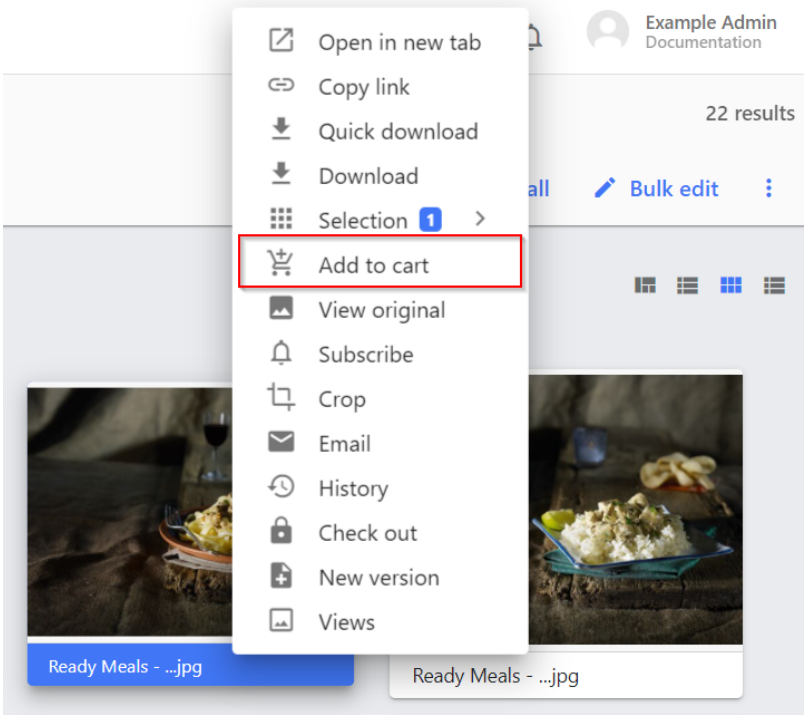
Adding Assets to the Cart

Assets may be added to the cart in several ways:

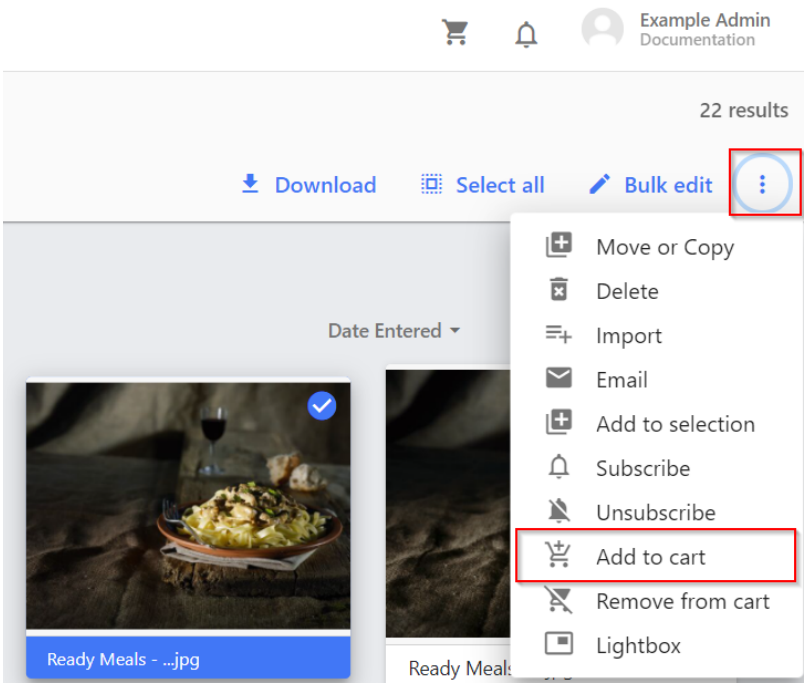
1. Dragging and dropping a selection of assets to the Cart icon in the menu bar.



2. When a single asset is selected, the asset's contextual menu will show the Selection > "Add to Cart" command.

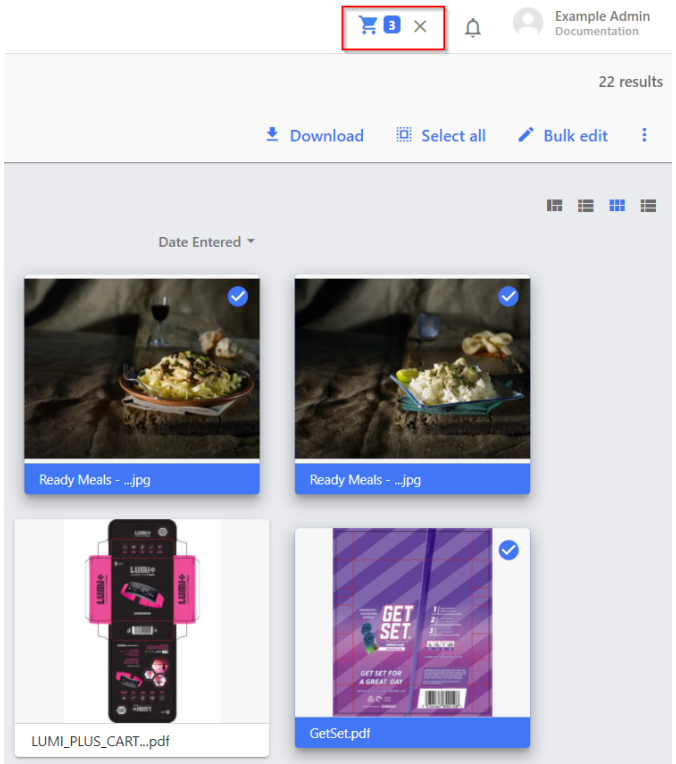


3. When one or more assets are selected, the Selection Bar action menu (vertical ellipses icon #) > "Add to Cart" command may be used.

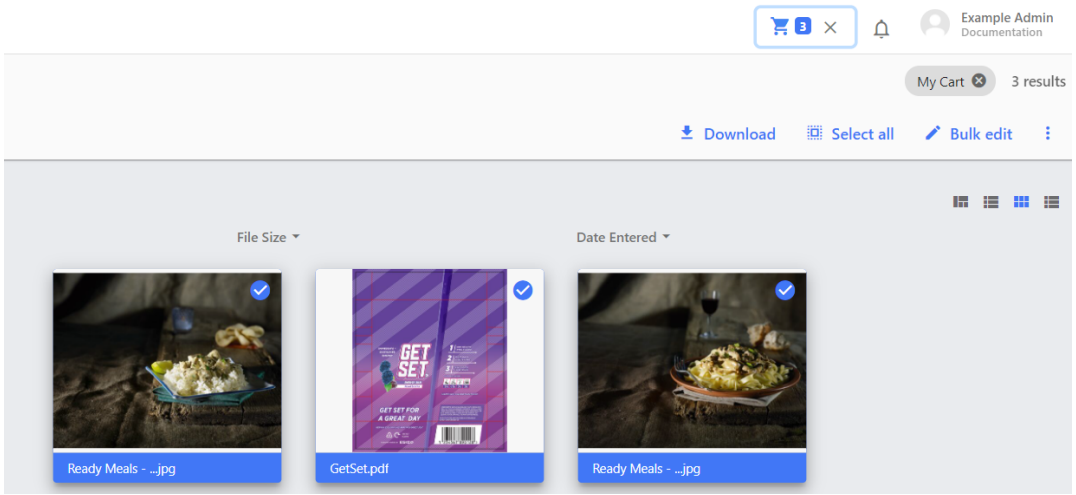


Manipulating Assets in the Cart

While assets are in the cart, the Cart Menu bar icon shows a count badge, indicating the number of assets currently in the cart, and an "X" icon that clears all current assets from the Cart.

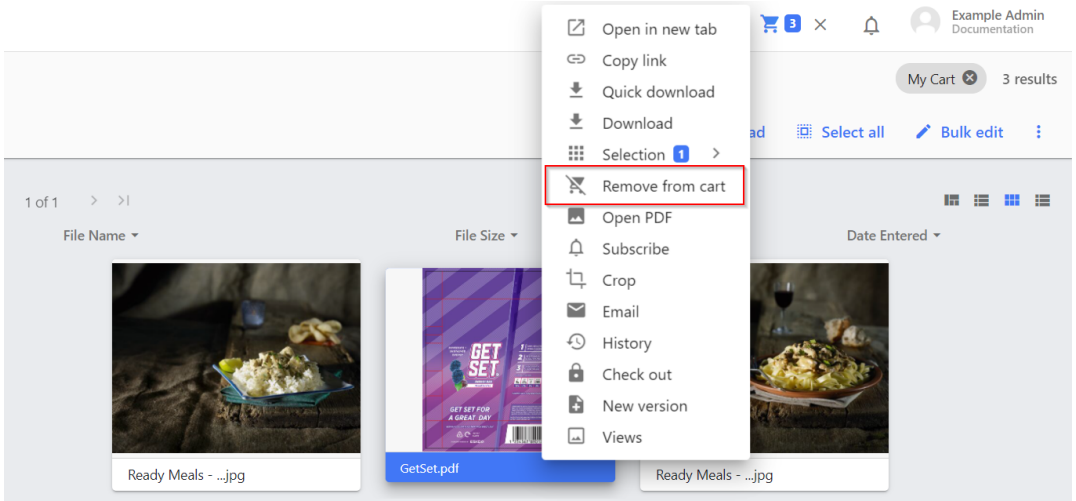


When the user clicks the Cart Icon itself, special search criteria called "My Cart" will be loaded. This filters the Current View to only those assets in the Cart.

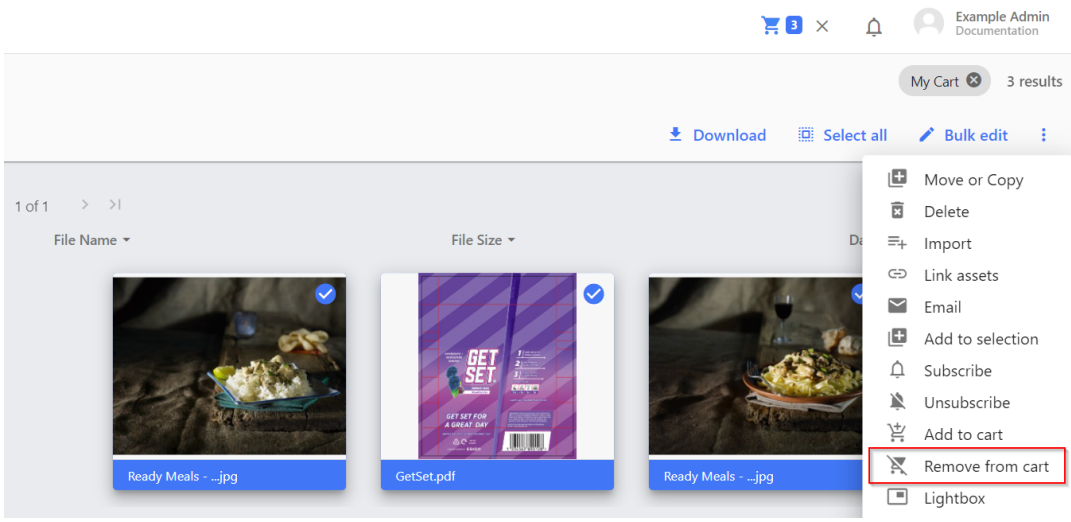


Removing Assets in the Cart

When a single asset within the Cart is selected, the asset's contextual menu will show the Selection > "Remove from Cart" command.

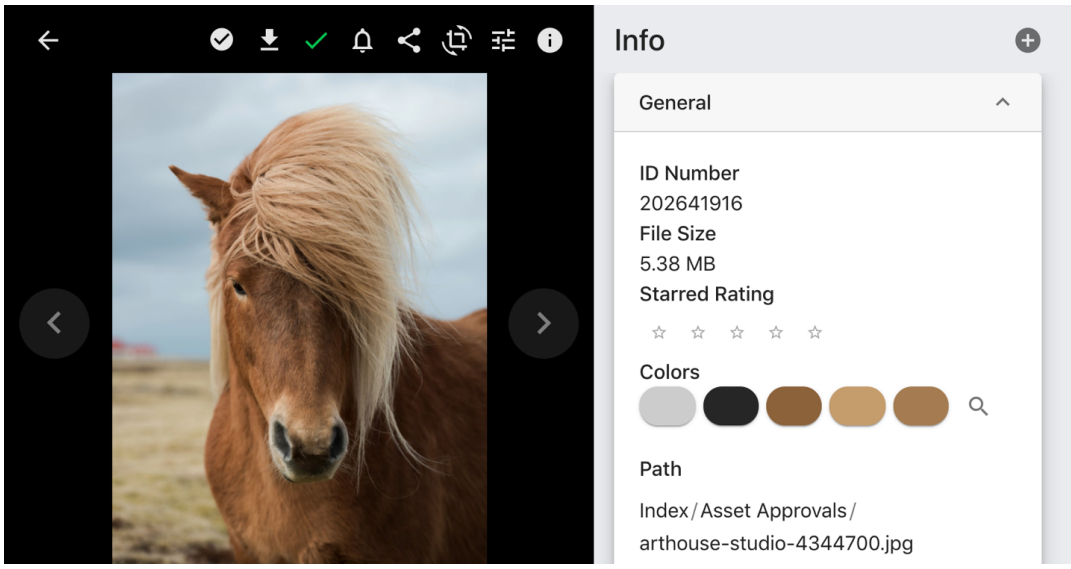


When one or more assets within the Cart are selected, the Selection Bar action menu (vertical ellipses icon #) > "Remove from Cart" command may be used.



All assets in a cart may be removed by using the aforementioned "X" icon next to a filled Cart icon in the menu bar.

An asset may also be removed from the cart in the Asset View by clicking the green check icon above the image preview.



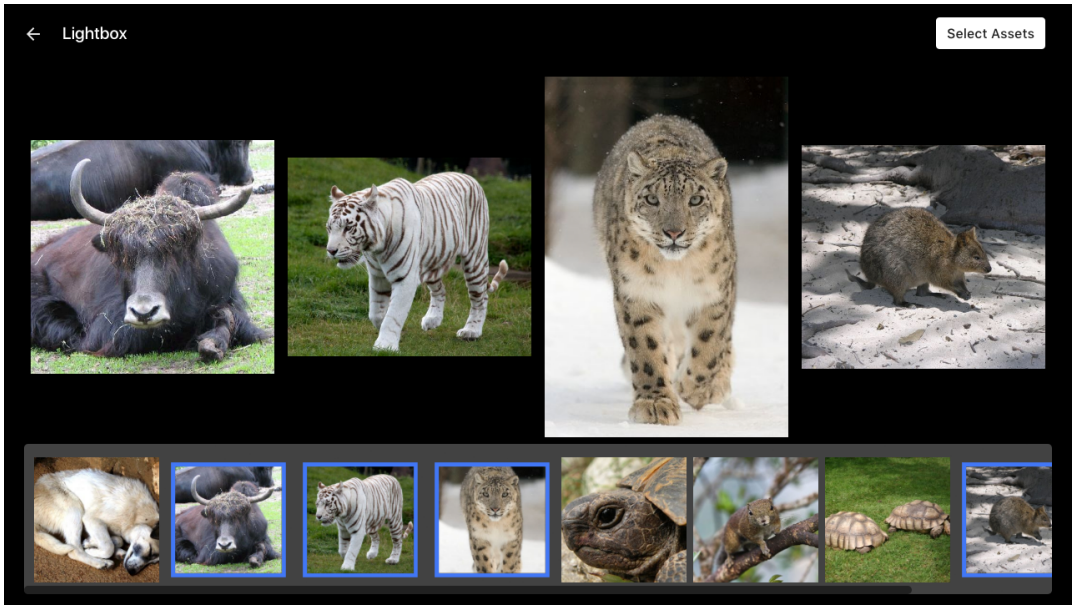
View Selected Assets

When one or more assets are selected, the "View Selected Assets" command may be used to filter displayed assets, using the special "Current selection" search criteria. This is similar to displaying the contents of the cart; however this view does not represent that same grouping of assets. This

command is primarily available via a keyboard shortcut, either command + shift + v (for macOS), or control + shift + v (for Windows).

3.12.3. Lightbox

The lightbox allows users to quickly compare assets side by side.



In this interface, the user can narrow down a selection of assets, similar to a physical lightbox.

It can be accessed via **Selection > Lightbox**.

The first 25 assets in an asset selection will be displayed in the Lightbox interface, composed of a preview area above and a selection strip below.

Assets in the selection strip may be toggled on and off with a click. This will add or remove them from the preview area.

The asset selection will be altered when the user clicks the "Select Assets" button, changing the current selection to contain only the selected items in the lightbox's selection strip.

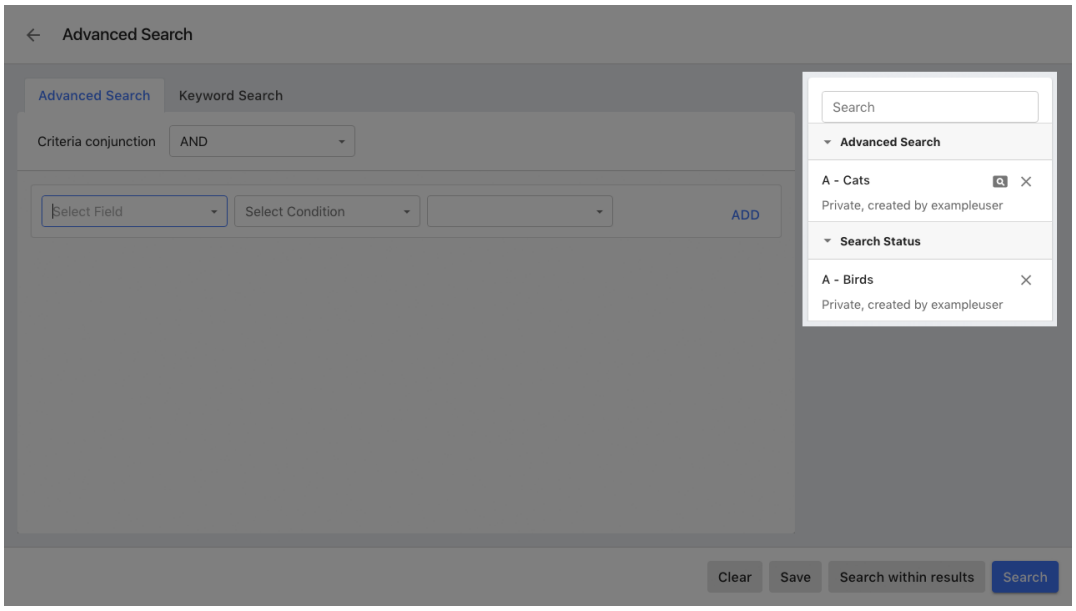
To exit without changing the asset selection, the user may click the Close (left arrow) button in the upper right.

3.12.4. Saved Searches

Saving searches for later reuse in MediaBeacon.

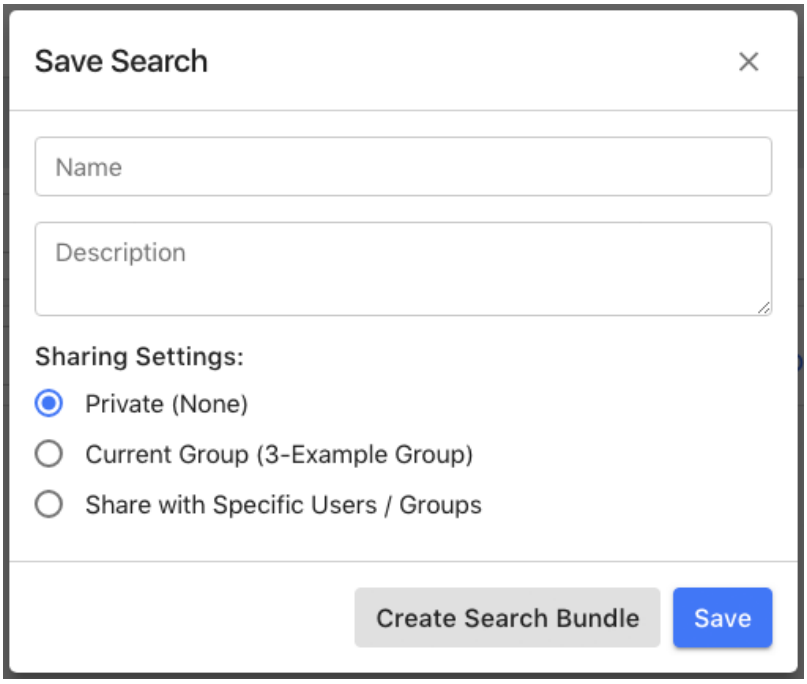
Two kinds of searches may be saved: Advanced Searches, and Status Panel Searches

Advanced Saved Searches



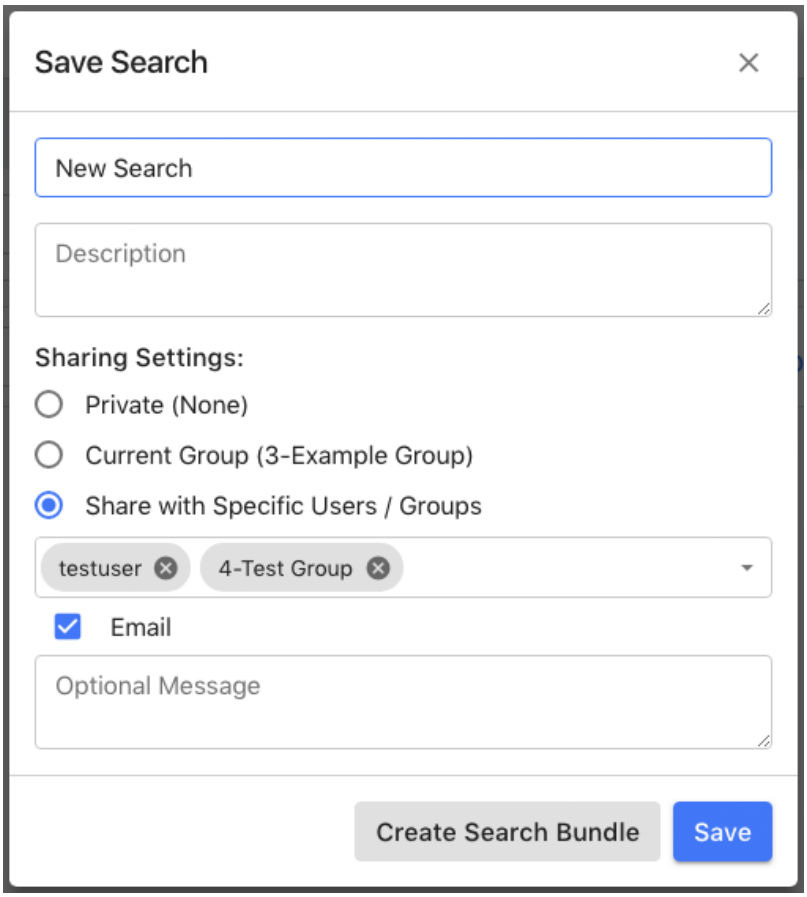
Advanced saved searches record the state of the Advanced Search and can be used to recall the results of that search. To the right of the Advanced Search dialog is the Saved Search panel

As the "Save" button indicates in the lower left of the Advanced Search dialog, advanced searches may be saved. Click "Save" to display the Save Search dialog.



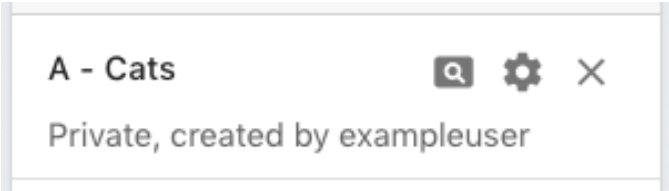
Once the user enters the name and an optional description of a saved search, the user will select a Sharing Setting:

- **Private**: Only the creator of the search and Global Administrators may see the saved search in the Saved Search Panel.
- **Current Group**: The saved search may be seen in the Saved Search Panel by all users of any ACL within everyone in the user's Current Group, even if they are not using one of those ACLs at the time.
- **Share with Specific Users/Groups**: This selection allows the user to share with other specific users and/or one or more specific groups. An optional email may be sent to the recipients.



Saved Advanced Search Interface

The Saved Search Panel displays a section for Advanced Searches, each with a name, and optional description, and various icons. Above is a search filter for saved search names.

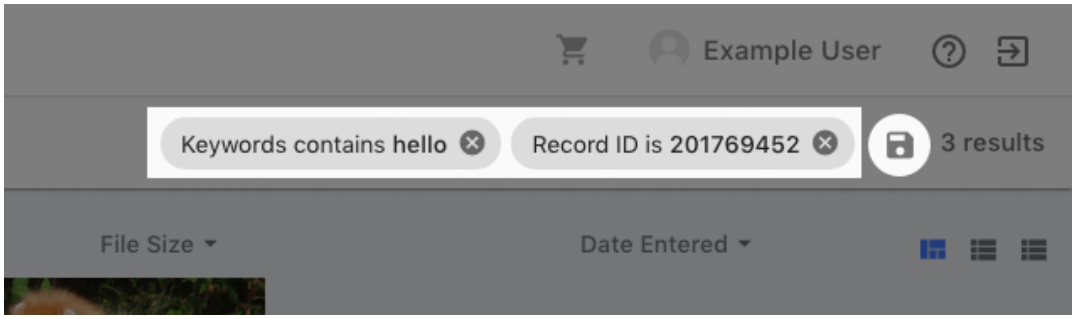


- **Globe**, to the left of the saved search title, indicates a search is shared.

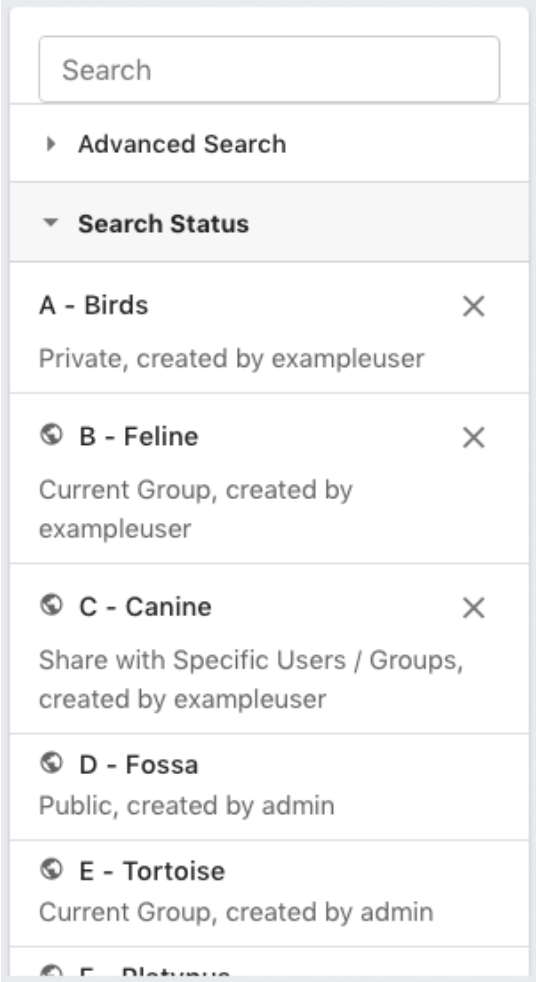
- **Magnifying glass**, loads the search in the advanced search dialog.
- **"X" icon**, deletes the saved search. Only the creator of a saved search can delete it.

Search Status Saved Searches

Search Status searches can only be made when an administrator has enabled the "Show Save Search Button" option in the Search Status component configuration.

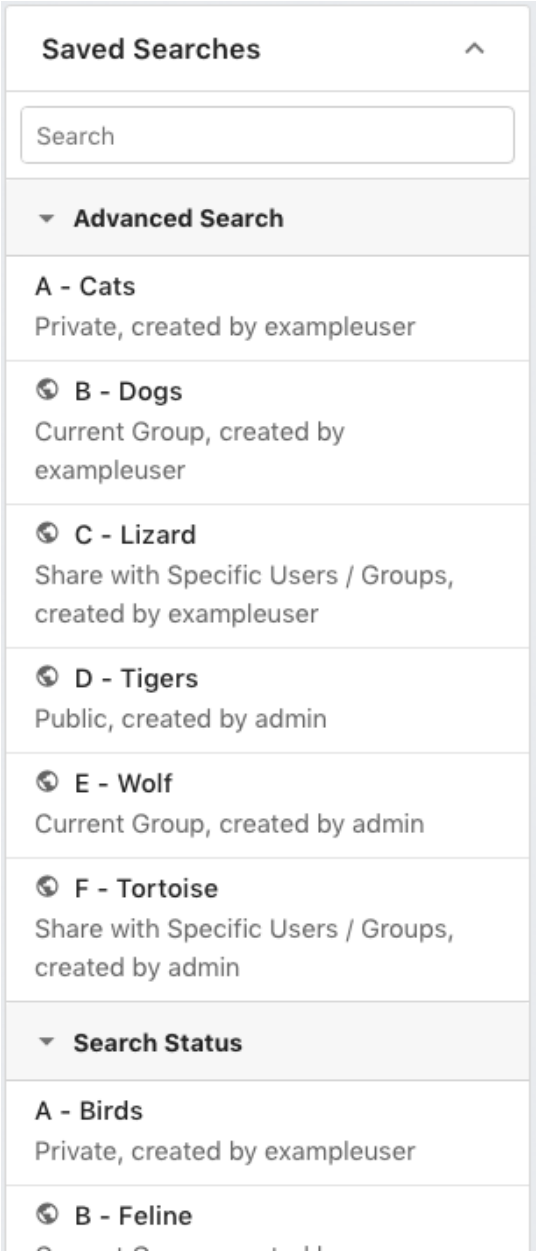


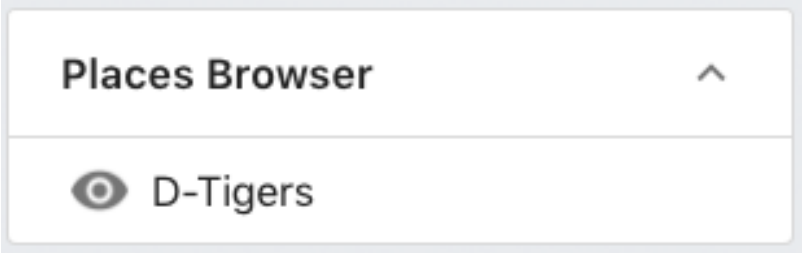
Searches of this type are displayed under the Search Status heading of the Saved Search Panel in the Advanced Search Dialog



Saved Searches in Other Components

Optionally, searches may be displayed in the Saved Search component. These interfaces allows searches to be performed with a click, but not edited.





Search Bundles

There is an additional option for saving a search using the "Create Search Bundle" button. This creates and an asset that allows the user to recall the saved search.

See the Bundles *Bundles* on page 144 section for more information

3.12.5. Saved Selections

This functionality provides a way to recall sets of assets without having to add common metadata or move them to a directory structure.

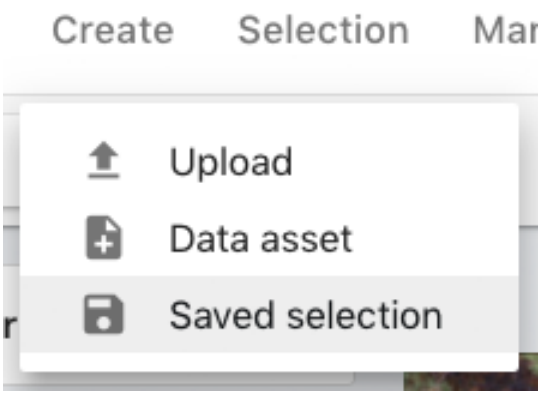
Saved selection commands are found in several places.

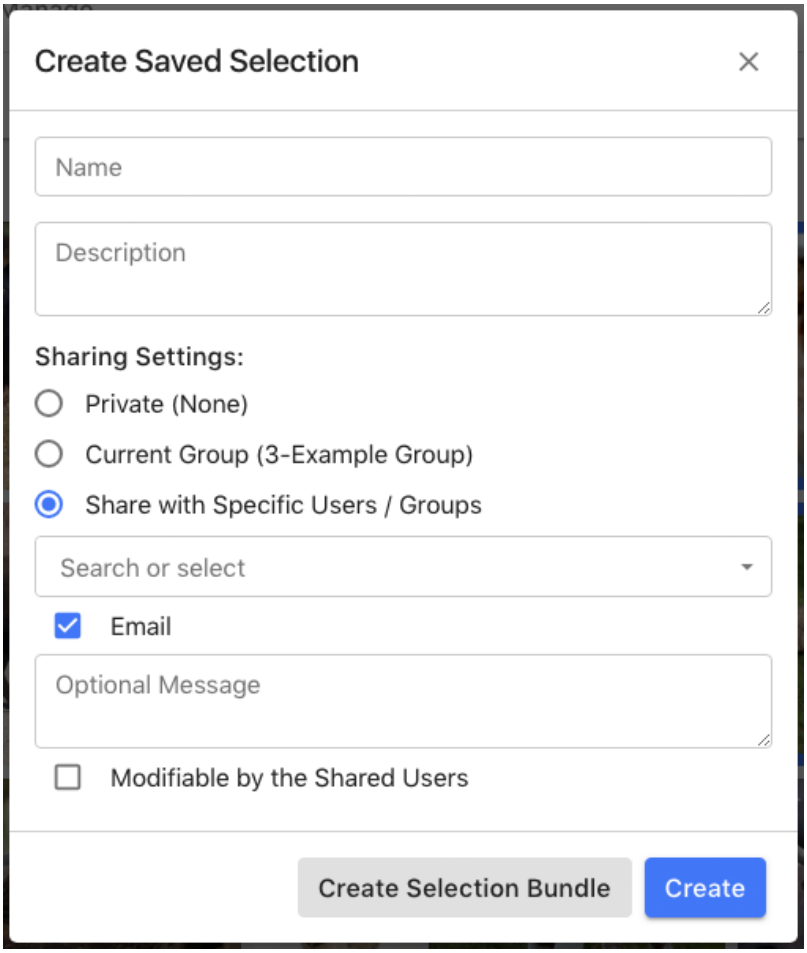
- "Selection" menu in Menu Bar
- "Selection" submenu in contextual menu of an asset (right-clicking on an asset).
- "Load Selection" when accessing contextual menu if the view component (right clicking on an part of the component that contains no asset).

Creating Saved Selections

While as assets are selected

1. **Menubar**
2. **Create**
3. **Save selection**
4. **Displays the Create Saved Selection dialog**

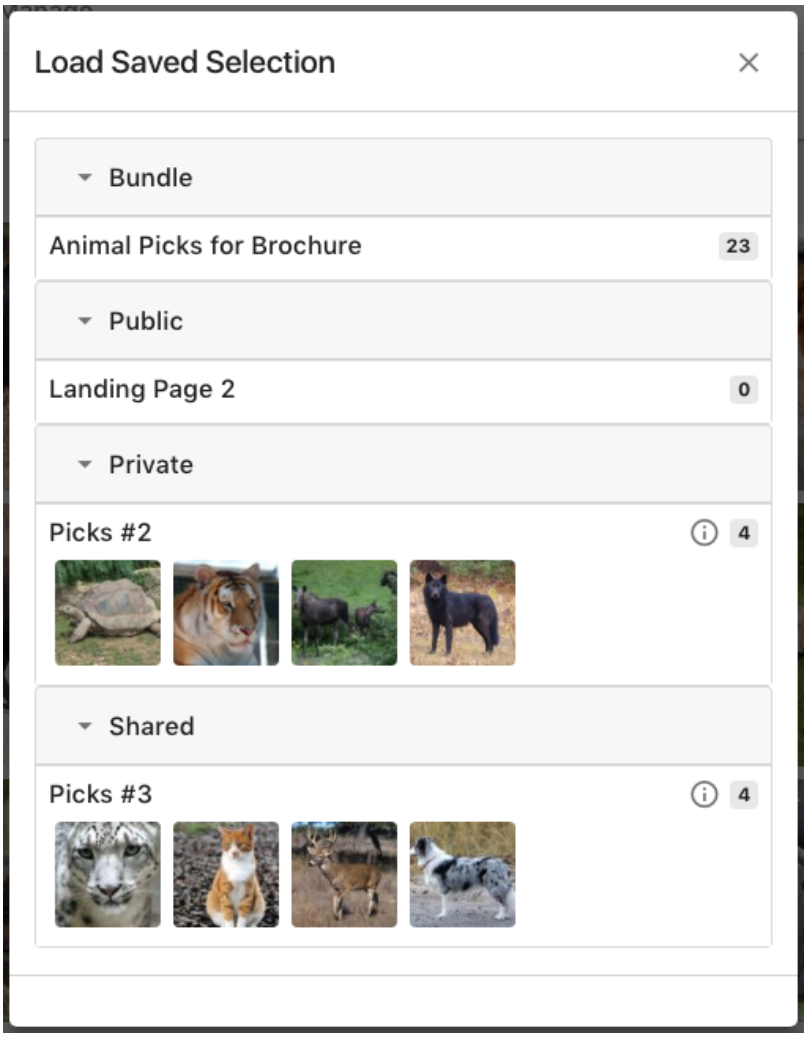




- **Name** & **Description**: Identifies the saved selection in the Load Saved Selection Dialog.
- **Sharing Settings**:
  - **Private**: The saved selection is only visible to the the user who created it.
  - **Public**: All users of the system may see this saved selection.
  - **Current Group**: This allows users of the group the user is currently using to see the saved selection.
  - **Share with Specific Users / Groups**: This selection has a number of options.
    - **User**: One or more users may be chosen with whom to share the selection.
    - **Email**: If enabled, an email containing a link to the selection will be sent to the above recipients. The user will be able to enter additional body text for the email.

- **Modifiable by the Shared Users**: Shown for all above settings except for "Private". This button allows other users to modify the selection, such as change its name, description and member assets.
- **Create Selection Bundle**: See the Bundles section for more information.
- **Create**: Creates the saved selection with the specified options.

Loading Saved Selections



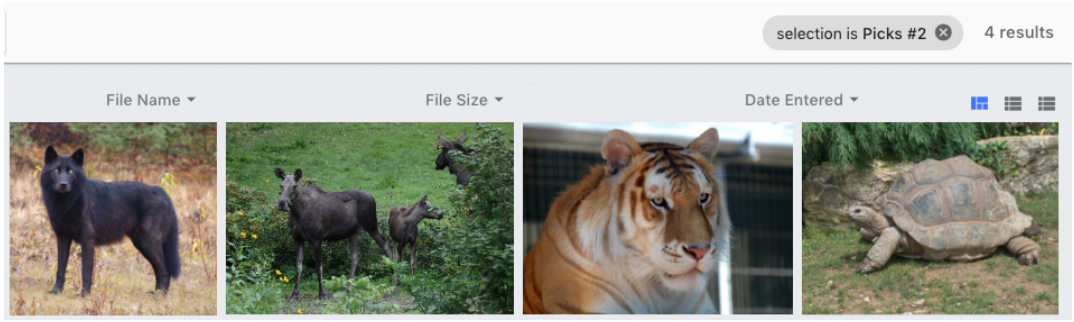
The load saved selection dialog is displayed when a the command:

1. **Menubar >**
2. **Selection >**
3. **Load**

This dialog has headings for selection bundles, Public, Private, and Shared saved selections.

Each entry shows the selection name and preview icon of the first 8 assets. If a description was added, it is shown when the "circle I" icon is moused over. An indicator number shows how many assets are in the selection.

When loaded, a saved selection is displayed in the view component, and search criteria is replaced with "selection is <selectionname>"

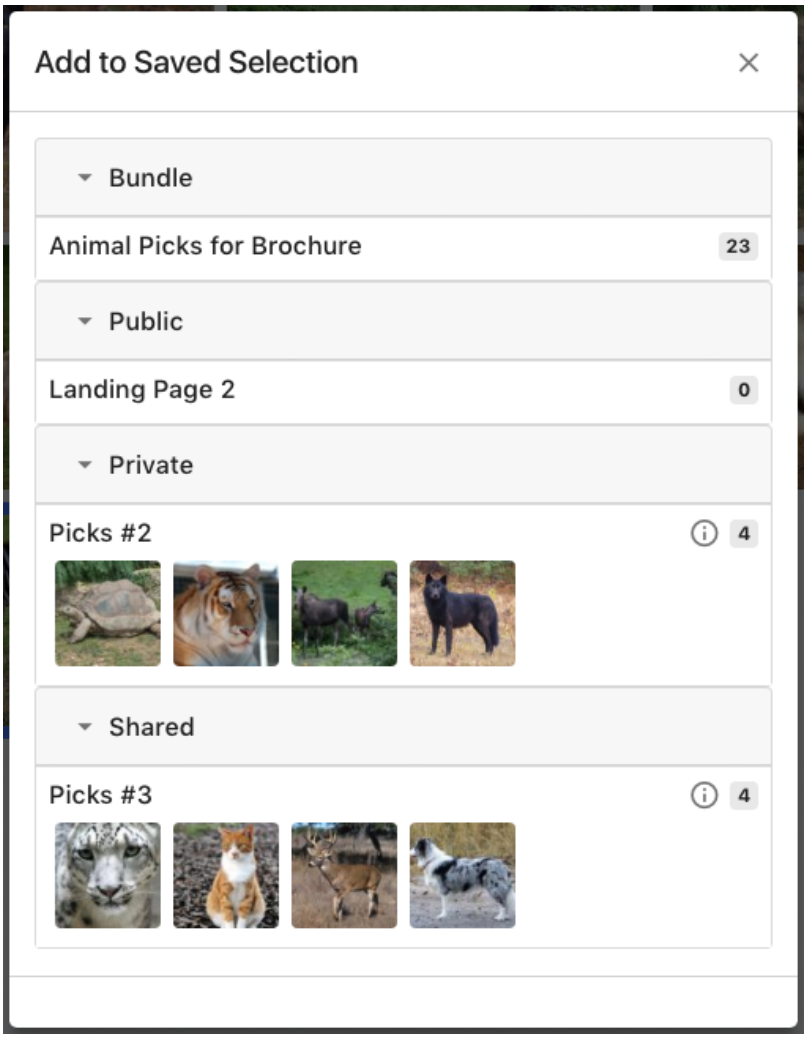


Modifying Saved Selections

Adding Assets

1. **Menubar >**
2. **Selection >**
3. **Add**

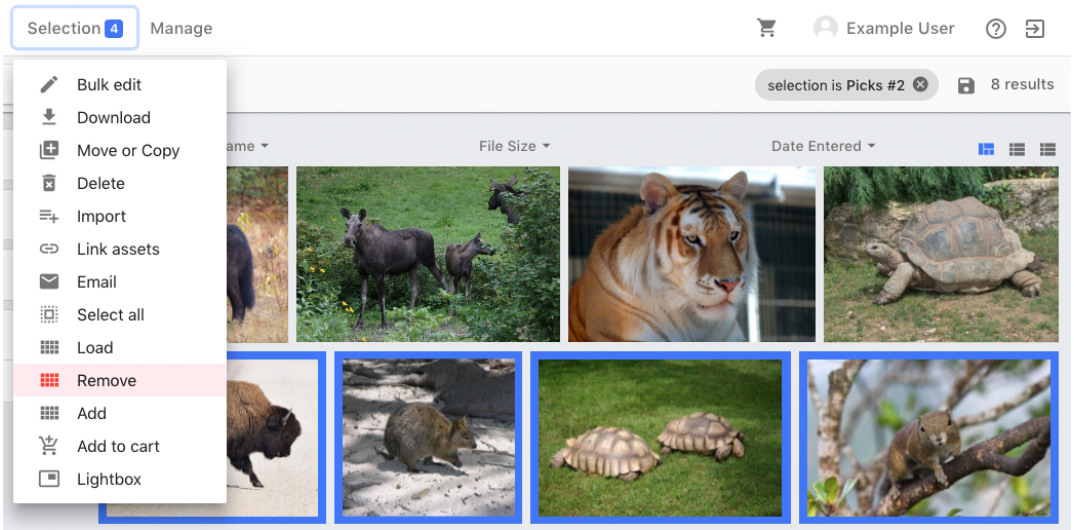
Adds the current asset selection to a previously saved selection. This will display the "Add to Saved Selection" dialog. The selected assets will be added to the clicked saved selection.



Removing Assets

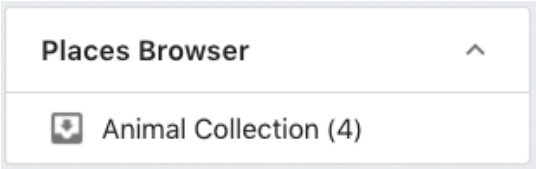
1. **Menubar >**
2. **Selection >**
3. **Remove**

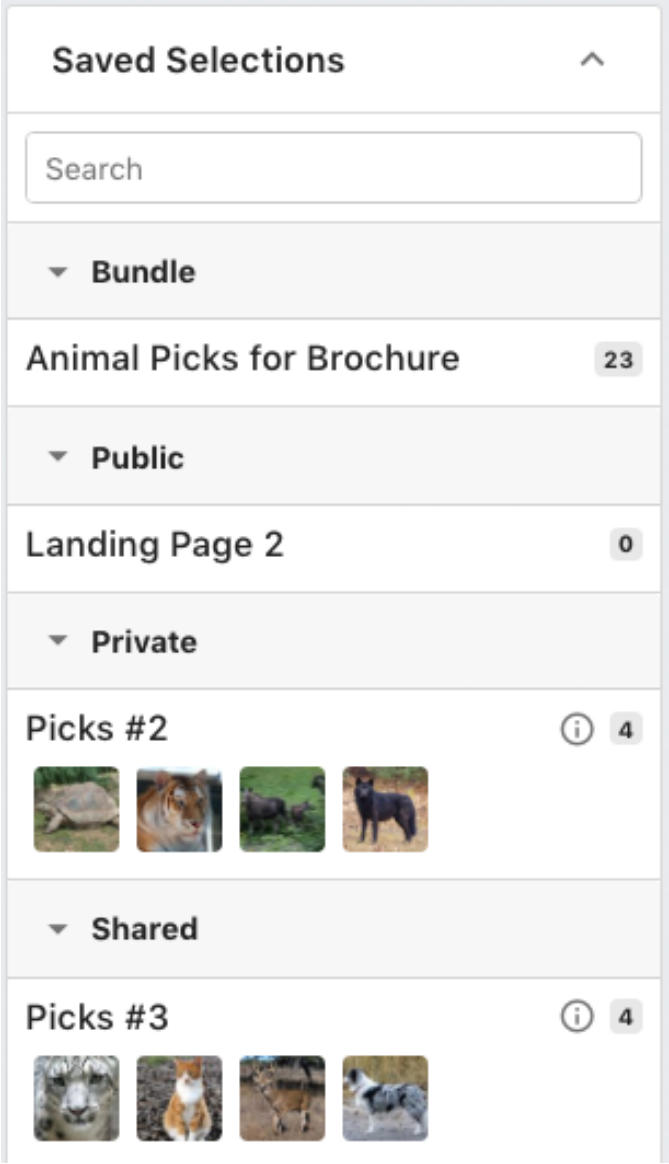
Removes an asset from a saved selection. This menu option is only shown when a selection is the current search criteria.



Saved Selections in Other Components

Saved selections may also be accessed in the Places Browser and Saved Selection components



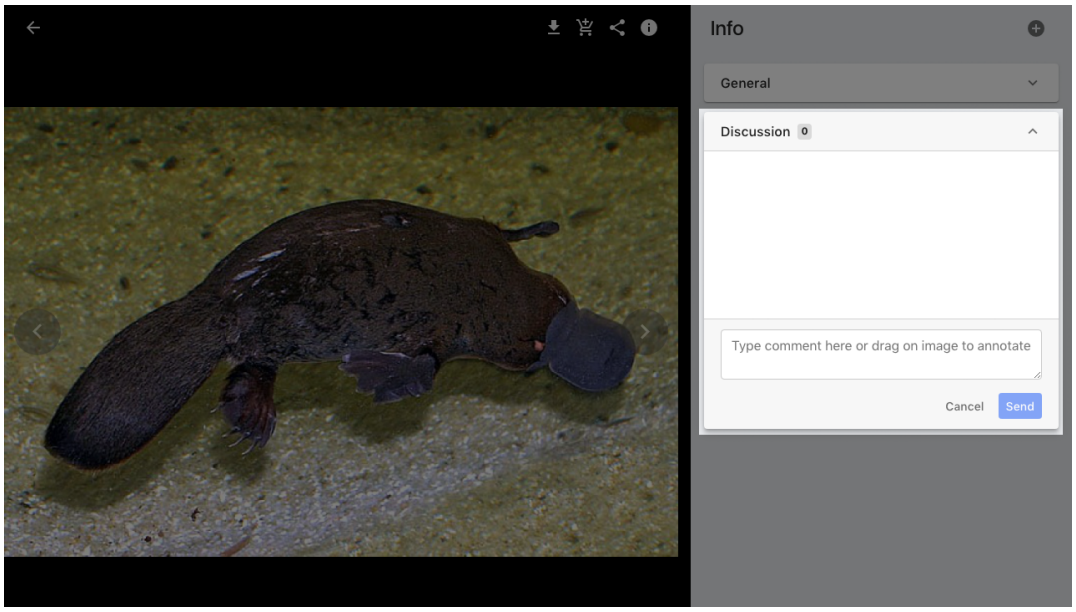


3.13. Collaborate and Share

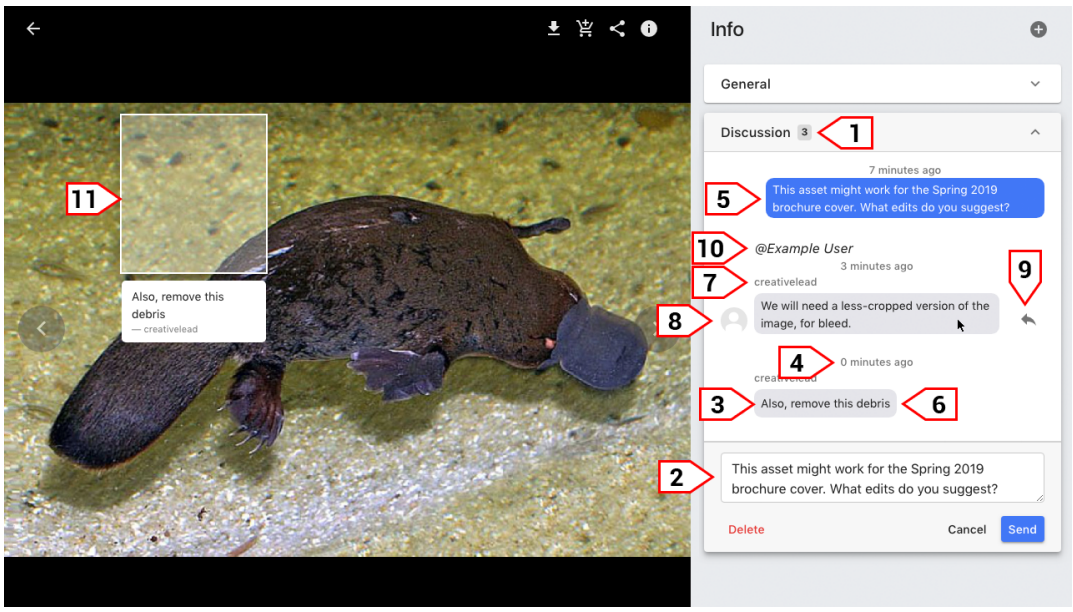
Collaborate functions allow users to work together and communicate about assets inMediaBeacon

3.13.1. Discussion

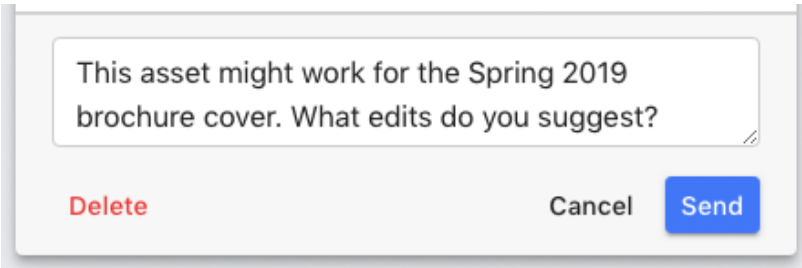
The Discussion form tab houses a post-style list of messages.



Comments may be added to assets in a chat-style interface in the Discussion Form Tab.



1. Discussion Count
2. Comment Field: Enter text here to add a comment.
3. Comments: Displayed in "bubble text".
4. Comments: Relative Time stamp
5. Self-Comments: Displayed in blue bubble text.
   a. Double click a self-comment to edit or delete it in the comment field.



6. Comment from another user: Displayed in gray bubble text.
7. Other User's Comment: Username
8. Other User's Comment: User Icon
9. Reply Icon: Shown when a non self-comment is moused over.
10. Replying to a user's chat will nest those comments under the replied-to chat bubble under a "@username" label.
11. Annotation: These are displayed with the user mouses over the image preview or the comment to which it is attached.

Comments

Each comment entry shows the time/date of the post, the user's name / icon, and the message. The posts on the left are highlighted to indicate they are the posts that the current user made.

A comment can be made by entering text in the post field at the bottom of the tab, and pressing "Send".

Comments may be edited by selecting a comment, altering the text in the field, and pressing "Send". They can be deleted by pressing "Delete" instead.

Searching Comments

Assets with comments made by a particular user may be searched for by entering the username preceded by an "@" symbol into the Quick Search component. For example, the asset above may be found by entering "@creativelead".

Annotations

Annotations are a type of comment that allows the user to select a portion of the image with a surround box.

All annotations on an asset are shown by hovering the mouse over the preview area, and specific annotations are seen when mousing over the comment to which it is attached.

To make an annotation, drag a surround box out over the asset preview. It can be resized and moved as well, hovering the mouse over the box shows a move cursor, and on the lower-right, hovering displays a corner-move cursor.

Once the surround box is made, the user can enter text in the comment field and press "Send".

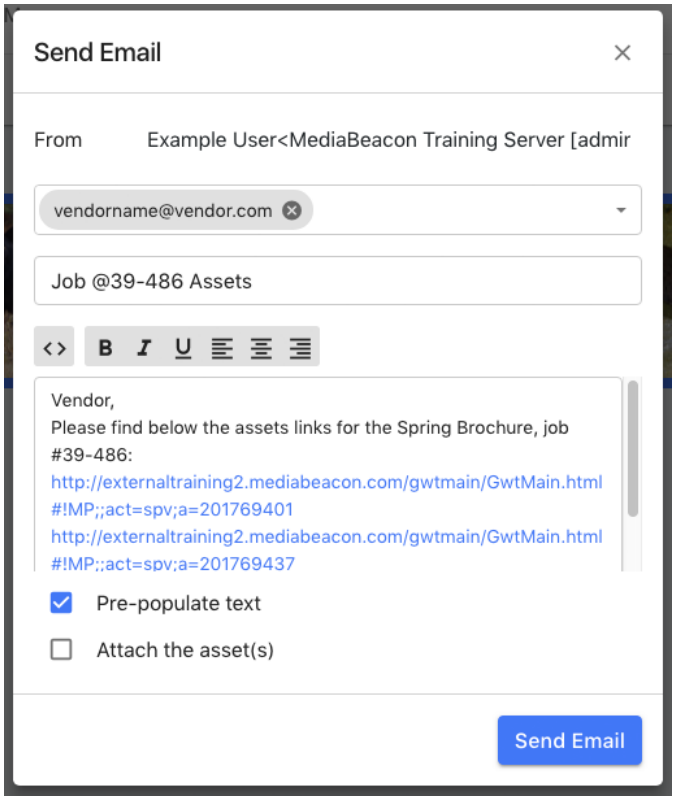
3.13.2. Email

This article covers several ways that MediaBeacon generates email.

Emailing Assets

When selected, and assets may be included or referenced in an email by choosing:

- **Menubar > Selection > Email**, or
- **Asset Contextual Menu > Selection > Email**

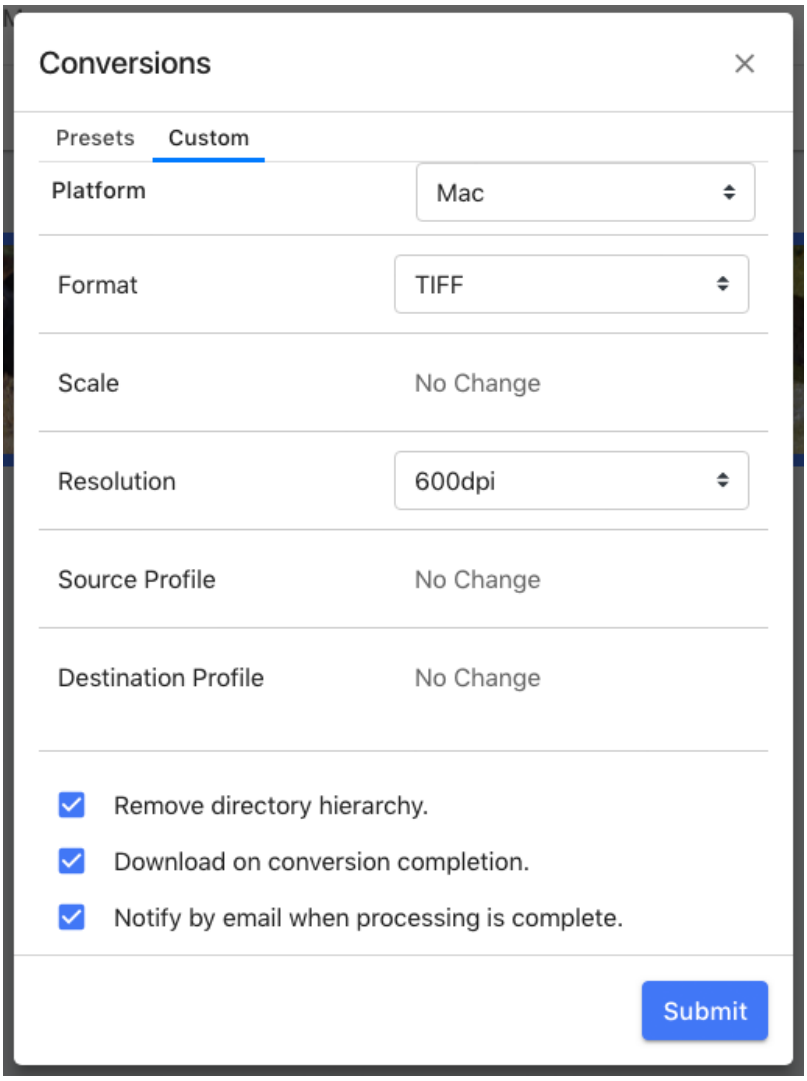


This will display the Send Email dialog:

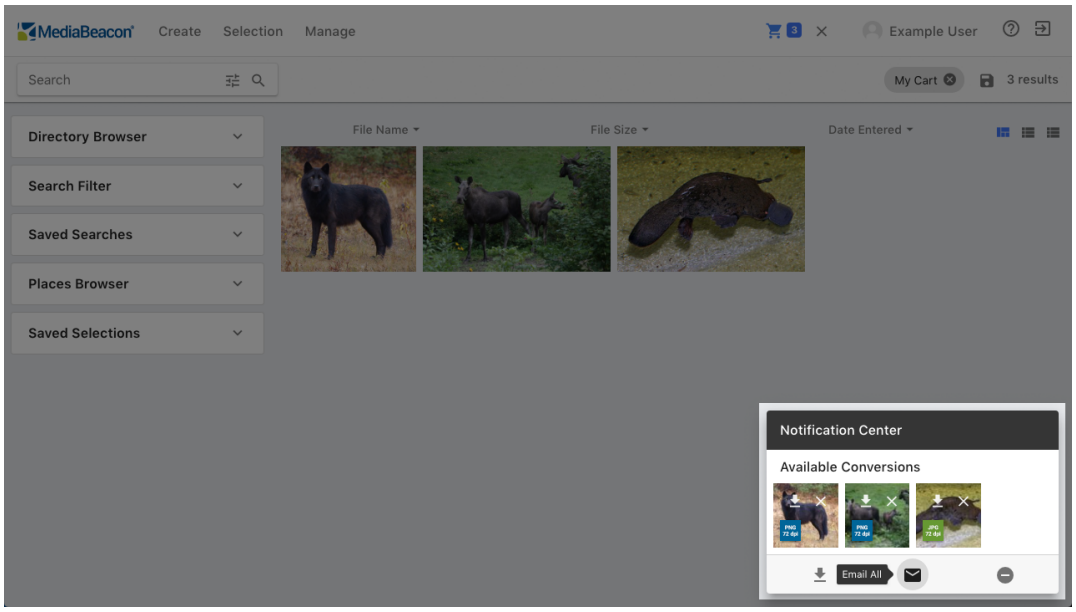
- **From**: This is defined by the server itself. All email originating fromMediaBeaconwill be listed as from this address, not from the individual user's email.
- **To**: The user may choose from a list of email addresses of users who share group membership with the emailing user. Other addresses may be entered manually, separated by commas.
- **Subject**: The email subject line may be entered here.
- Body: This area is pre populated with asst links, but the user may enter additional text and apply formatting if required.
- **Asset Links**: These links allow the asset to be opened by the recipient, if:
  - The user can log into MediaBeacon, and
  - If the user has access to those assets.
- **Pre-populate text**: This checkbox will clear the body section and fill in the asset links when set to checked.
- **Attach the asset(s)**: This option will include copies of the assets as email attachments. This is limited to a maximum of 10Mb per email, but this may be lower depending upon your MediaBeaconinstance's settings.

Email on Conversion Completion

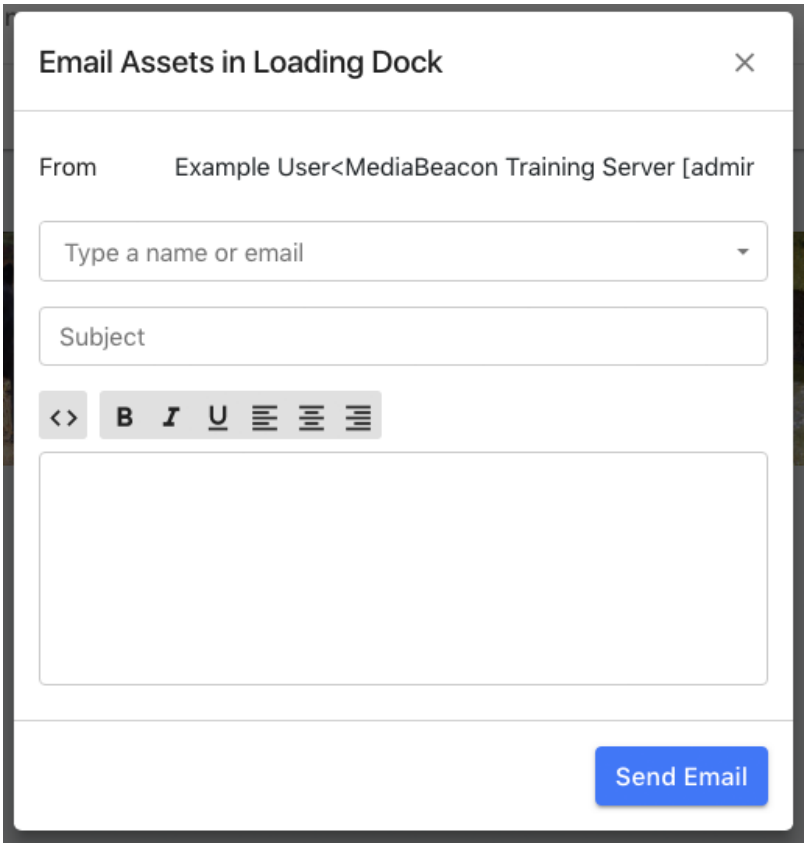
- **Selection Menu > Download > Custom Tab >** Notify a user when a large conversion has completed: This option sends and email to the user when conversion processing is complete.



Email Available Conversions



- **Notification Center > Email All**: This command will open the "Email Assets in Loading Dock" dialog. All assets will be sent as attachments. Note email attachment size limit as discussed above.



Email from Sharing Selections

- **Menubar > Create > Save Selection > Share with Specific Users / Groups**

See the Saved Selection section for more information.

Email from Scripts

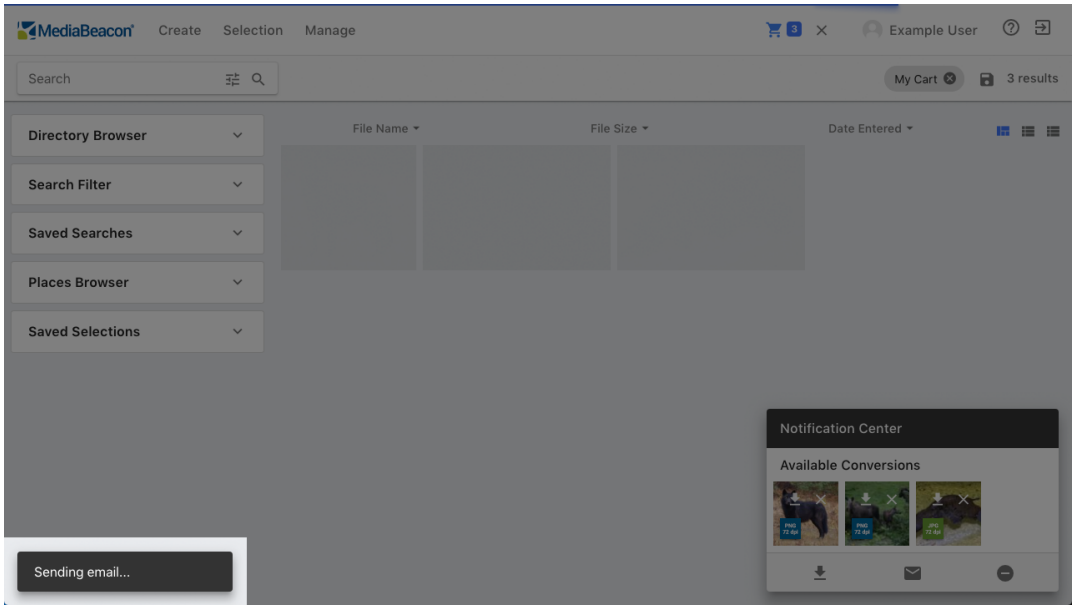
MediaBeacon can also send emails to users that are generated by internal scripts. These will be specific to a given installation and configured by an administrator

Email from External Links

This function also send emails to recipients and creators of external links. See the External Links article for more information

Notifications

Email send progress is noted in the lower left of the screen, not the notification center.

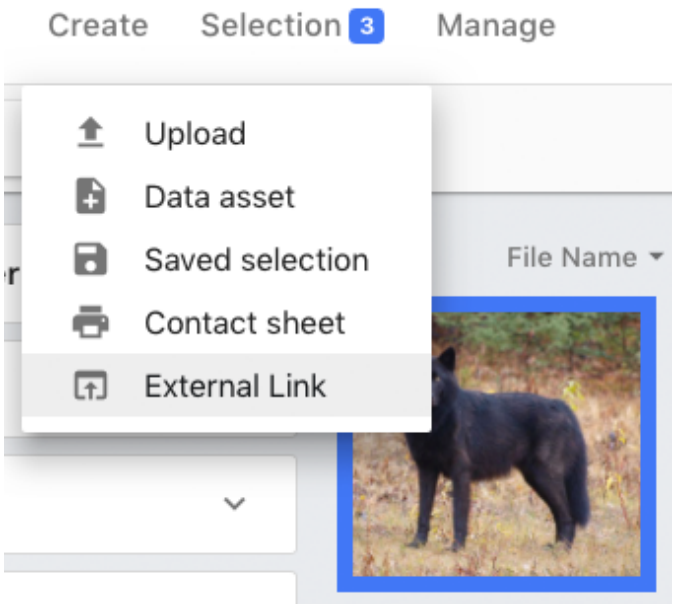


3.13.3. External Links

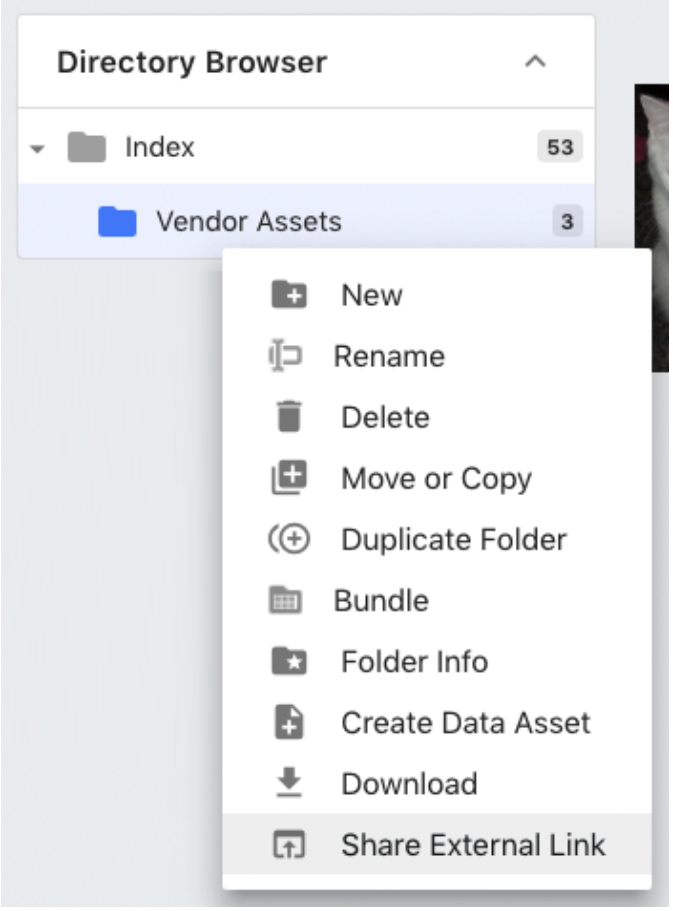
The external link function allows users to create a link to download assets that don't require a MediaBeacon login.

This function will need to be enabled by the administrator to be an option for users.

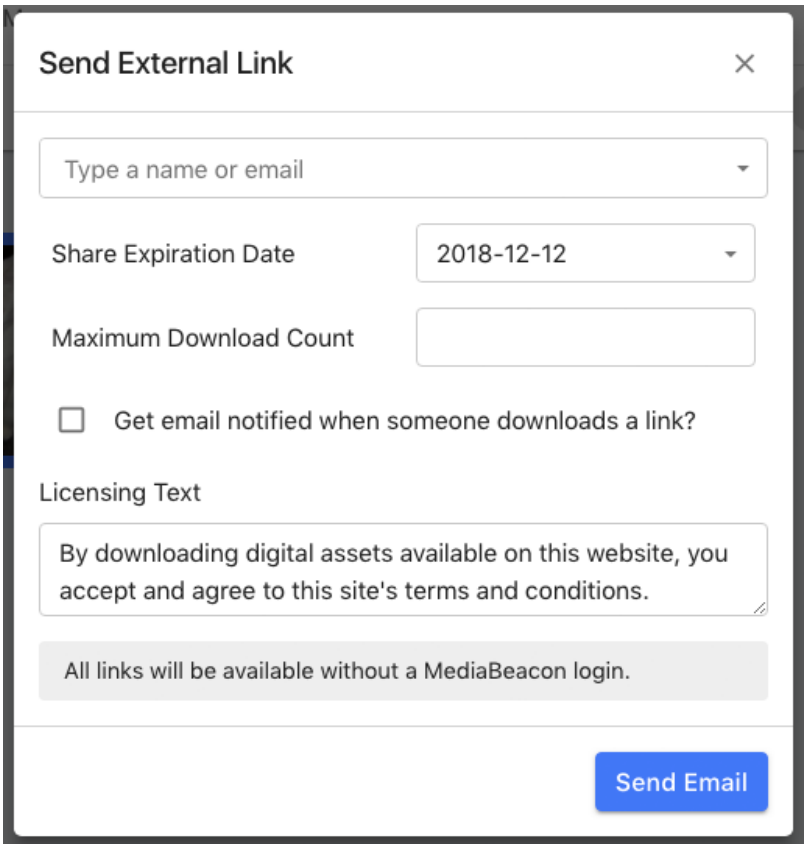
Create External Link



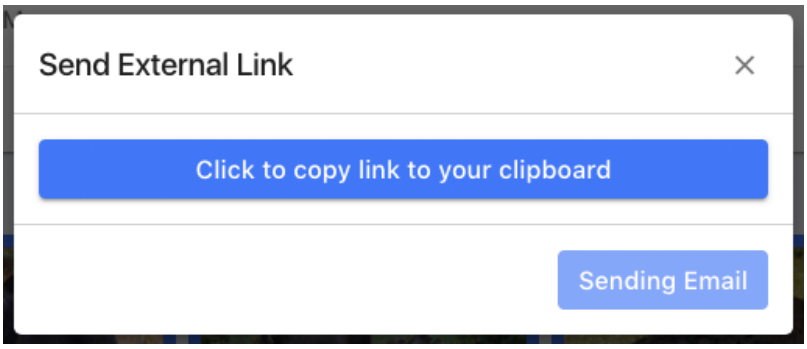
- **Share External Link**: Creates a link to all assets in a folder.



Send External Link

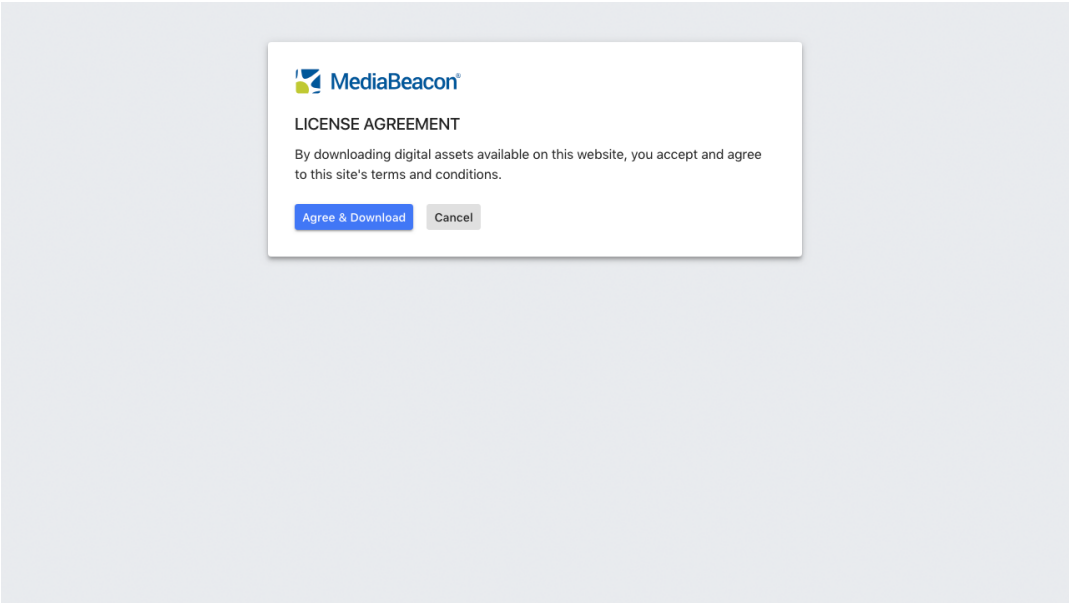


- **Email Field:** Allows entry of email addresses or MediaBeaconusernames. The pull down will show a list of user email addresses. At least one email address must be entered.
- **Share Expiration Date:** Once this date elapses the link will not function. If no date is supplied, the expiration date will be set at 30 days from the current date.
- **Maximum Download Count:** Every time the link is downloaded, this count will decrement. If no number is specified, there is no limit on the number of downloads.
- **Checkbox: "Get email notified when someone downloads a link?":** This enables an email to be sent to the user who created the link each time a download occurs.
- **Licensing Text**: This is displayed on the download page, see below. This text defaults to: "By downloading digital assets available on this website, you accept and agree to this site's terms and conditions." but may be changed to any text the user chooses.
- **"Save" / "Cancel"** buttons: Creates the external link, and cancels link creation respectively.
- **"Click to copy link to your clipboard."** button: When a link is created this button is displayed, allowing the user to copy the link to their computer's clipboard.
- **Send Email** button: The link is created and emailed to the recipients. It will also open the "Send External Link" dialog, which allows the user to copy the link to their computer's clipboard.



Using an External Link

When the link in question is followed, a new browser tab will open, displaying a download page.



- **Agree & Download**: Downloads the content of the external link.
- **Cancel**: Closes the current browser tab.

Managing External Links

The user may not alter an external link once created, but they can be disabled by an administrator.

3.13.4. Subscription Notification System

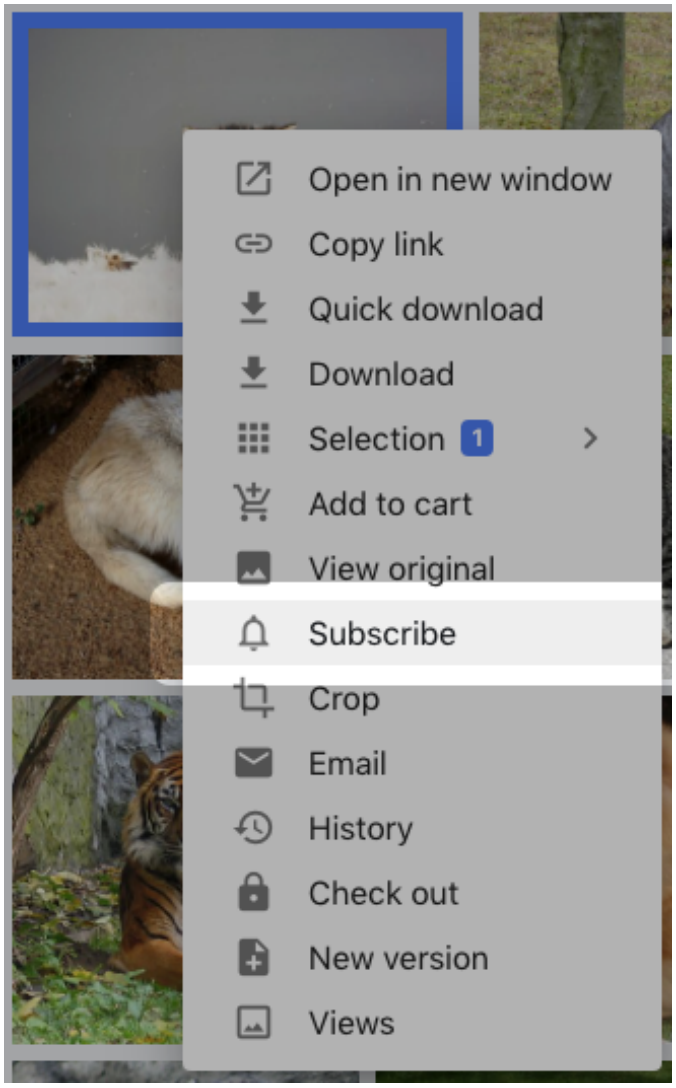
A new feature In MediaBeacon 2019.2, the Subscription Notification system allows users to subscribe to an asset and receive real-time notifications in a bell icon in the menu bar when the asset is edited, deleted, or downloaded. These notifications are sent when another user performs these actions to any subscribed asset.

This behavior is standard in MediaBeacon2019.2, but may be disabled by a permission restriction.

Note: The "Notification Center" is a related, but different function, used to show the user feedback for actions that they have performed, such as uploaded assets or a metadata edit.

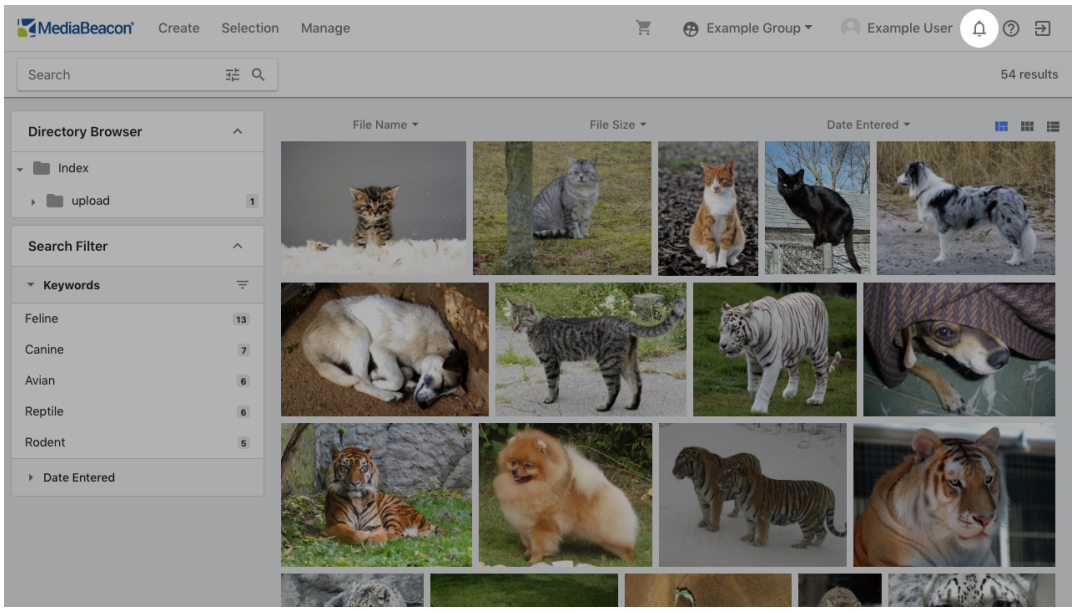
Assets Subscription

- Subscribe command: allows the user to subscribe to an asset. When subscribed to an asset, this entry will display as the Unsubscribe command, performing the opposite action.

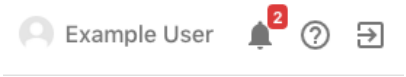


Notification Icon and Menu

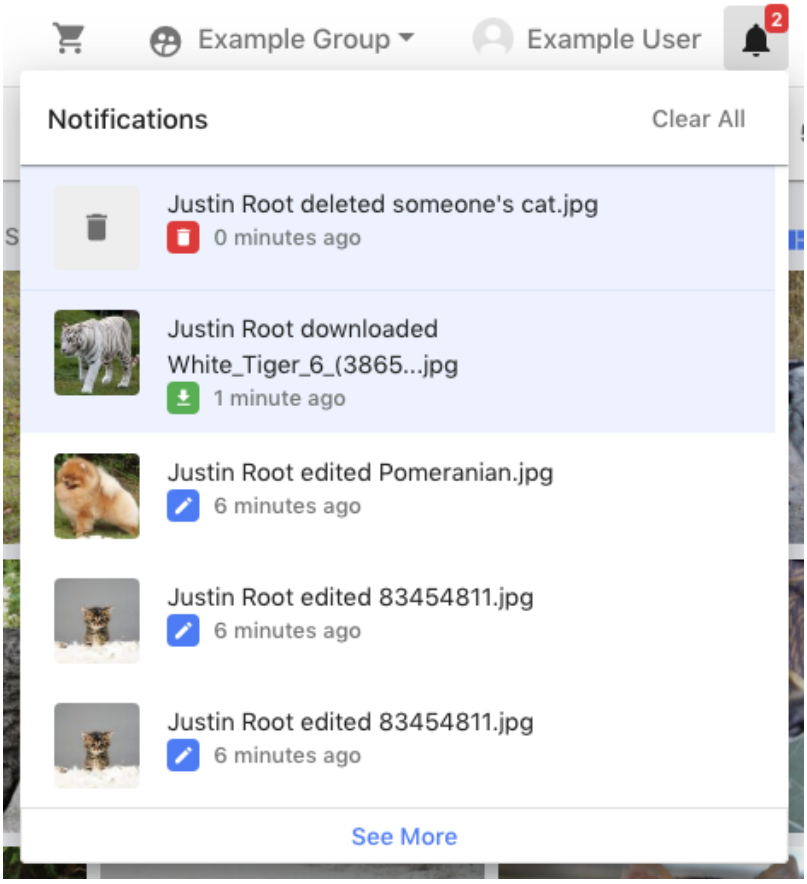
- A bell icon (notification icon) is displayed in the menu bar, between the User indicator and the Help icon.



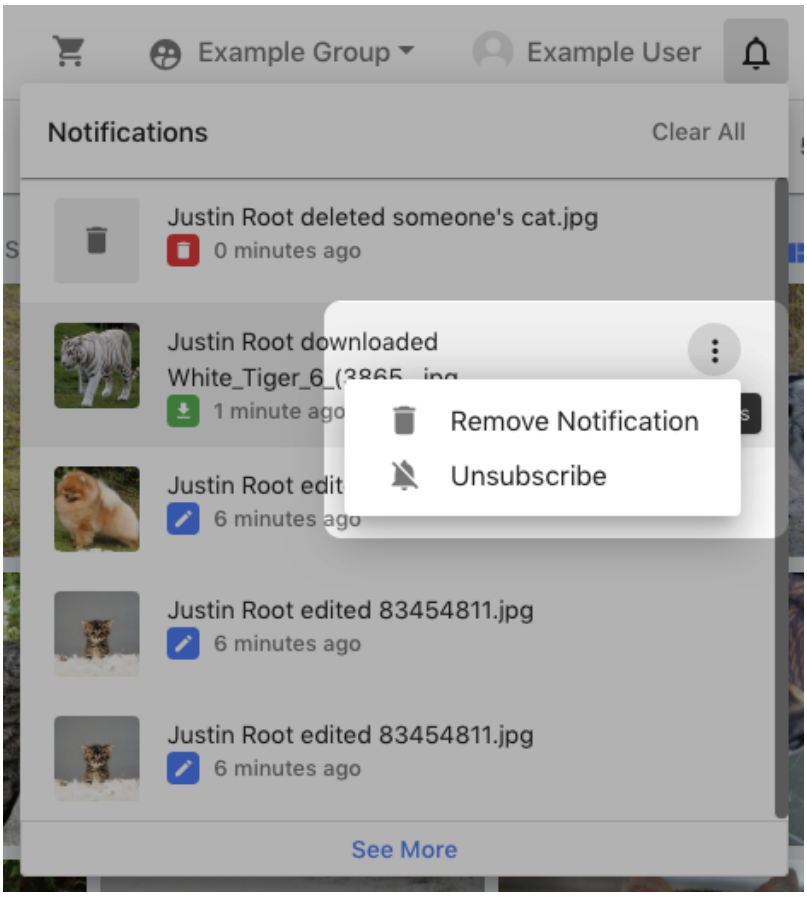
- When new notifications have arrived, a numbered badge will be shown on the bell icon.



- When clicked, the bell icon will display the Notifications Menu. This menu displays entries that represent events for actions taken to Subscribed assets. New actions are highlighted in blue. Once the menu has been closed, previously new notifications are considered read and no longer generate the numbered badge on the bell icon.



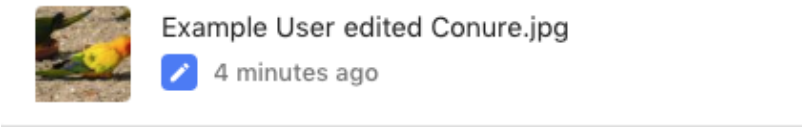
- Each notification will have a small icon indicating the type of action performed. See the Notification Types section.
- Hovering over the "X minutes ago" string will display a tooltip with the exact date and time of the notification.
- Each notification entry has an action menu that allows the user to remove the specific notification, or to unsubscribe fro the asset, and receive no more notifications from that source.



- The "See More" link will open the Notifications Dialog

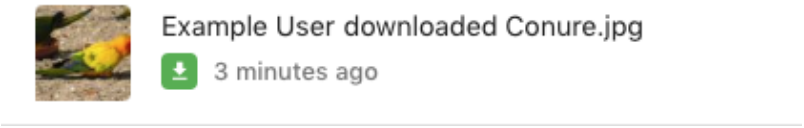
Notification Types

Asset's Metadata Edited



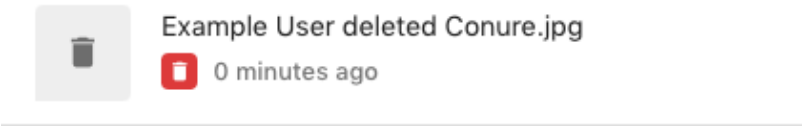
- Blue icon
- This notification indicates that metadata in the subscribed asset has been edited by another user.
- Clicking this type of notification opens the asset in Asset View.

Asset Downloaded



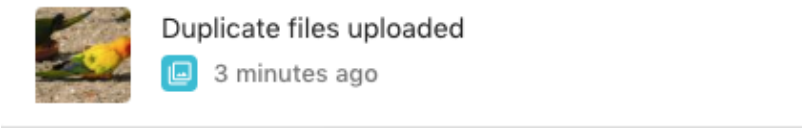
- Green icon
- This notification indicates that the subscribed asset has been downloaded by another user.
- Clicking this type of notification opens the asset in Asset View.

Asset Deletion



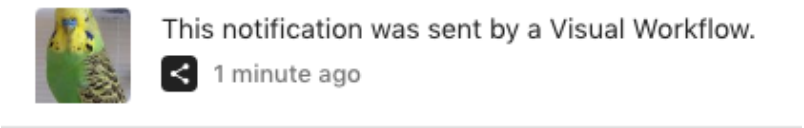
- Red icon
- This notification indicates that the subscribed asset has been edited by another user. Deleting an asset will delete all prior notifications about that asset, and send the "asset deleted" notification.
- This notification type does not have an action upon click, as there is no asset to display.

Asset had Duplicates Detected



- Cyan icon
- This notification indicates that duplicates have been detected, and subscription is not required. This notification is only shown for the user who uploaded assets that have duplicates detected.
- Clicking this type of notification will open the saved selection that was generated during an upload event that show all assets that match the upload at the time of upload.

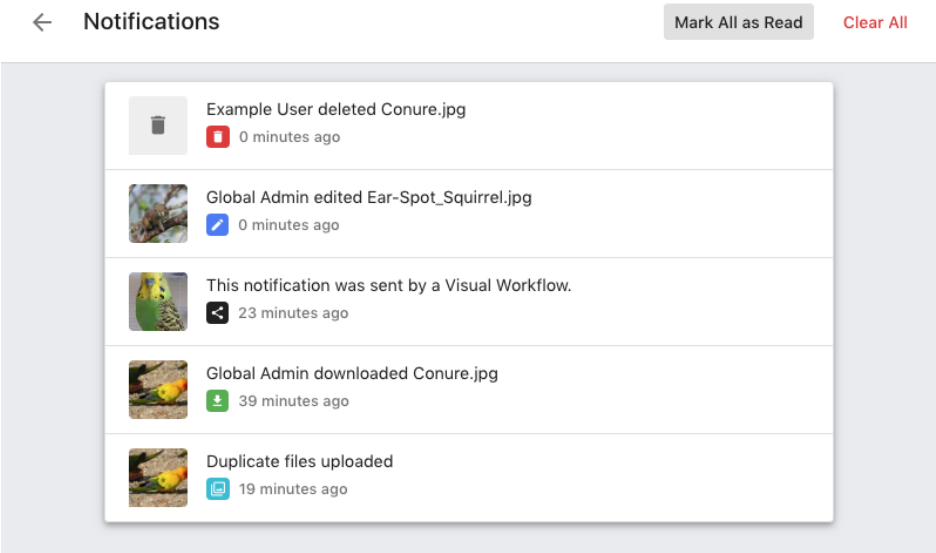
Asset Notification Send via Workflow



- Black icon
- This notification is generated by a workflow, and does not require subscription. The settings of the workflow dictate the recipient and message of the notification.
- Clicking this type of notification opens the asset in Asset View.

Notifications Dialog

- This dialog, opened when "See More" is clicked in the Notifications Menu, displays a list of all notifications accessible to the user
- These entries also have an Options menu see Notification Menu section, above, visible when the cursor is hovered over the right side of the entry.

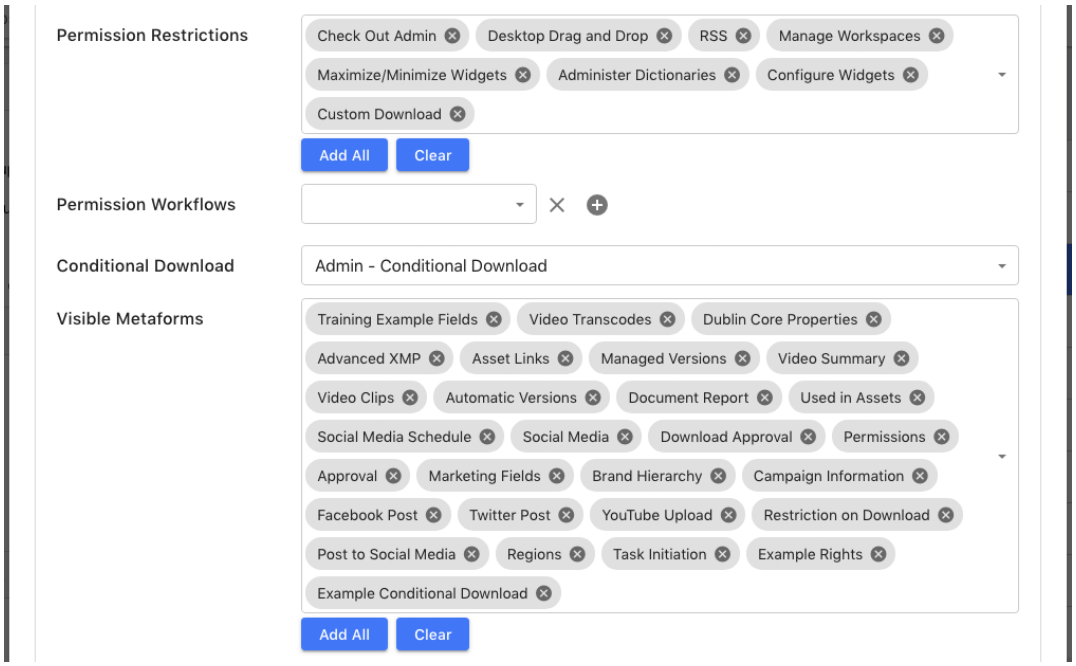


3.14. Rights Management

This Section contains the information about Conditional Download i.e. Control of asset download based upon metadata.

3.14.1. Conditional Download

Control of asset download based upon metadata.



The Conditional Download function will prevent the download of all assets that are not returned by the configured saved search.

For example, if a date field is used to define downloadability, a typical search would be look like this:

- Expiration Date is null OR Expiration Date is after today

This search, when configured as the saved search used by Conditional Download, will prevent download of any asset that has a past date in the Expiration Date field. Assets with no values in that field will not be affected.

Assets that are prevented from download via this function will have some menu commands suppressed

- Download
- View Originals
- Crop
- Email

- Check Out

Figure 23: Unrestricted

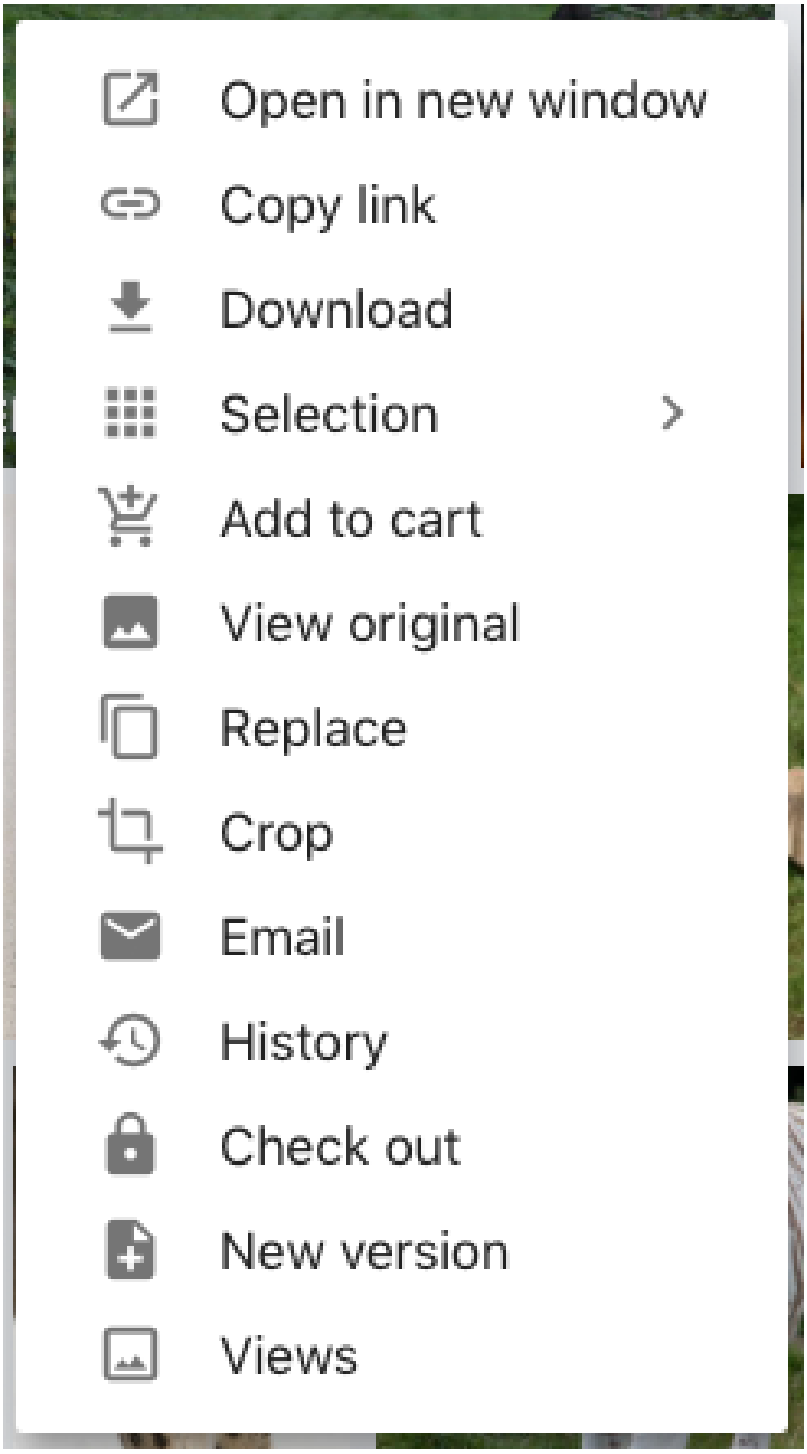
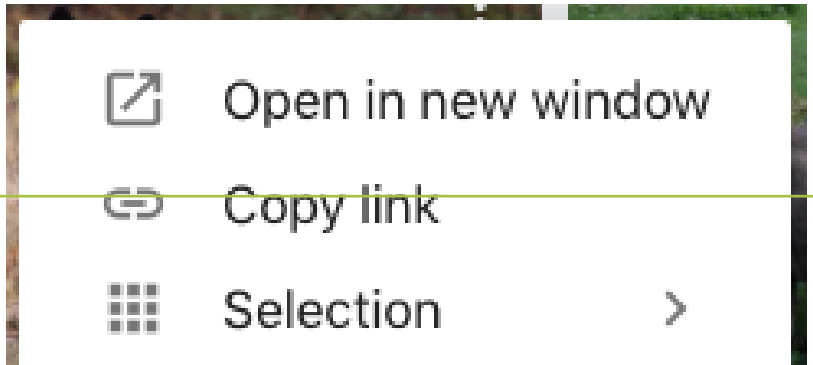


Figure 24: Restricted



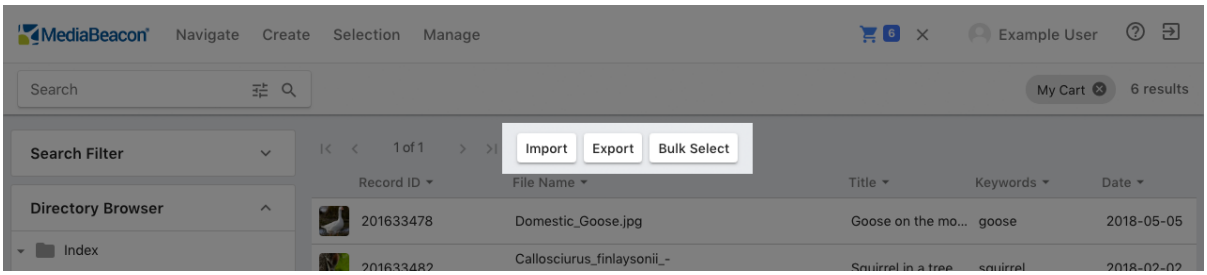
3.15. Guide to MediaBeacon's Metadata Import & Export

*A guide to importing and exporting metadata to and from MediaBeacon.*The MediaBeacon Import/Export Wizard collects three basic functions, all of which are in the List component in a special configuration.

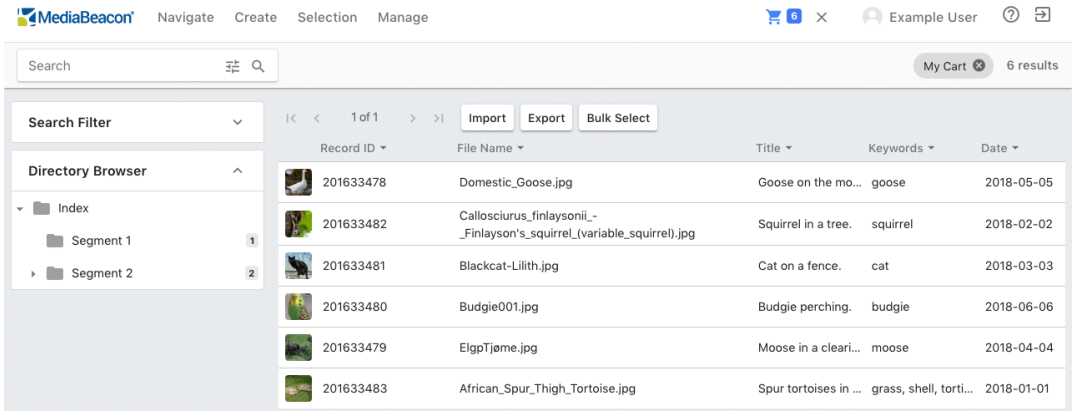
- **Import**: Performs per-asset XMP metadata changes to many assets at once
  - This function can also create Data Only assets in bulk.
- **Export**: Export XMP metadata from MediaBeaconassets to standard formats.
- **Bulk Select**: Allows users to perform searches that contain many search terms on specific fields.

Overview

These functions are accessed as buttons in the List View component, enabled by an administrator for users whose roles require it.



The column header order determines the order for imported and exported metadata. For example, a List View component so configured can import or export a data file as shown below.



Once this is configured, MediaBeacon is ready to import metadata to, or export metadata from assets. Searching, filtering or selecting assets will narrow the scope of the set of assets acted upon.

Data Import Technology

This guide makes reference to several distinct concepts:

- **Asset:** A file, with associated metadata that is currently resident in MediaBeacon.

- **(Metadata) Import File**: A file that contains the metadata to be imported into MediaBeacon via the Import/Export Wizard.
- **Metadata Source**: The original source(s) of metadata from which the import file is created. This is usually an existing spreadsheet, database, or previous DAM system.
- **Export File:** A file generated by the Export function. This can be re-purposed into an Import file, depending upon the situation.

3.15.1. Functional Usage

These articles review the required preparation steps to use Import/Export. Understanding this material is recommended before using the wizard functions.

Configuring List Component

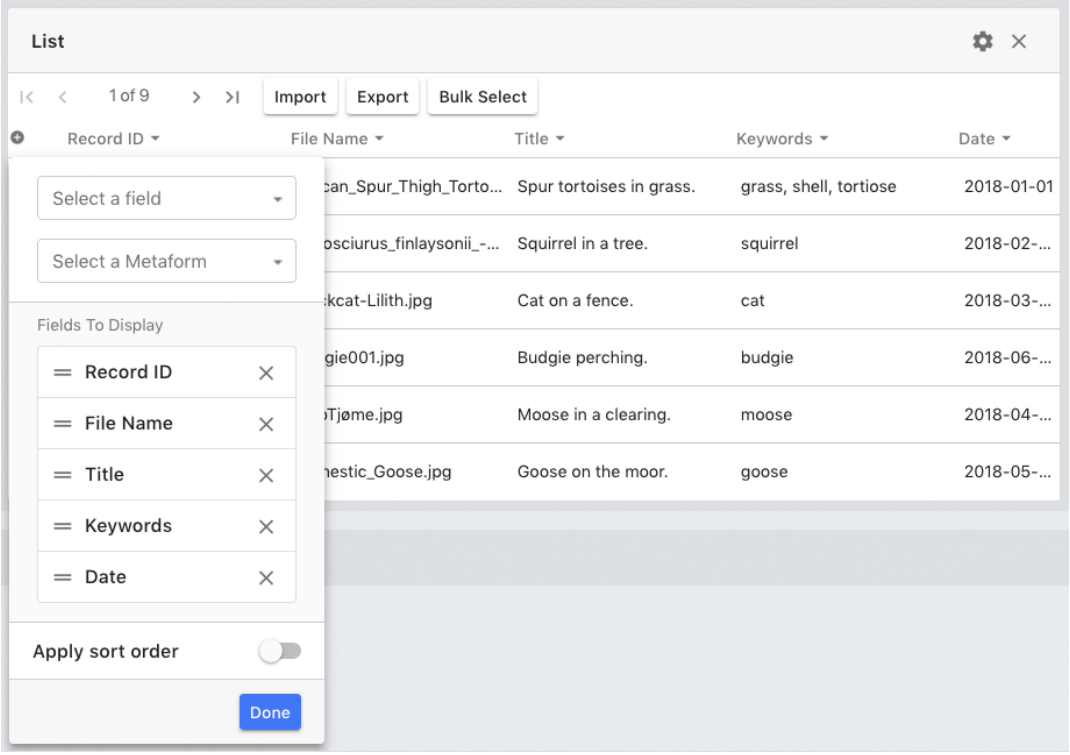
This article details preparing the list component for Import/Export Wizard use. Several areas of MediaBeacon need to be configured in order to use these functions, requiring a Global Administrator account. However, using the configured List component does not require this and may be performed by General User accounts.

- List Configuration dialog > List View Options:
  - Enable Import, Enable Export, Enable Bulk Select: Each enables the respective button on the List component.
  - Width: Adjust the width available for column headings. See "Adjusting Width" below.
- Column Headings
  - Configured in the List component itself, when in admin mode.
- Admin Core > Fields
  - Rarely, some fields may require SQL index to be enabled, but this is **not necessary or desirable in most cases**.

Configuring Column Headings

The column header order determines the order for imported and exported metadata. For example, a List View component so configured can import or export a data file as shown below.

Global Administrators may configure column headings when in "Admin Mode" by clicking the circle-plus icon to the left of a List component's column heading bar.



- Select a field: Choose a specific field to add to the "Fields to Display" section.
- Select a Form: Choose a Form to add all the field in that Form to the "Fields to Display" section.
- Fields to Display: This list defines which column headers are shown. The top-down field list corresponds to left-right column arrangement.
  - Rearrange Fields: Click-drag the rearrange handle (= icon) to the desired position.
  - Delete Fields: Click the "X" button.

The field options (visible by clicking the name of a field in the "Fields to Display" list), and "Apply Sort Order" settings are not important to adjust for Import/Export wizard configuration.

Choosing a Key Field

When performing Imports (and to a lesser extent, Bulk Selects) with the wizard, it's important to keep in mind what pre-existing metadata in MediaBeaconwill be used to associate a given line of data in the import file with a given asset. This is usually done using a single field (although multiples can be used) that contains information that can uniquely identify an asset.

This is referred to as the "key field". When arranging column headers, MediaBeacon assumes that the **leftmost column** is used for this function. This can be changed on-the-fly during import, but it is considered best practice to assume this to be the case.

Below are some fields that are often used as key fields for metadata Imports:

File Name

Assets that are not in the same directory within MediaBeacon may have the same file name. For this reason, using "File Name" as the Key Field is not recommended, unless all assets in the installation (or set of assets being acted upon) are certain to have unique names.

Record ID

This number (aka Asset ID) is assigned to assets automatically by MediaBeacon and is unique, but is only assigned to assets when ingested. Therefore, a pre-existing metadata source would not have this identifier. This approach to file matching is recommended when metadata is exported from MediaBeacon, altered and then re-imported.

Long Name (File Path)

This is often recommended for initial ingest of metadata to assets that are new to aMediaBeaconinstallation. Using this field requires that the import file contain file paths of assets on previous storage, and that those file paths for assets have remained minimally changed. In the following example, only the ending part of the file path has changed.

- **Example Original Filesystem Path**

```
N:\\Asset Store\WIP\2016\Anycorp\Logos\Draft Wunderkind P21357.ai
```

- **Example MediaBeaconFilesytem Path**

```
C:\Users\Administrator\MBAssets\WIP\2016\Anycorp\Logos\Draft Wunderkind
    P21357.ai
```

This auto-generated field displays the folder path of an asset relative to the current ACL's root directory. This can be seen in the General tab, in the asset view, under "Path". Note that the prefix "Index/" is not included in the Long Name value.

To use this information to identify assets by a partial path, the import file may need to be altered to comply with this formatting.

1. Remove the unique (first) part of the path, ideally representing the highest-level directory moved into MediaBeacon.
2. Remove the preceding slash.
3. Replace backslashes with forward slashes.

Examples

- **Example Original Path (HFS)**

```
Work HD/Users/emmettbrown/Archive/Biological
    Taxonomy/Domestic_Cat_White.jpg
```

- **Example Path on MediaBeacon's file store (NTFS)**

```
C:\Users\Administrator\MBAssets\Archive\Biological
    Taxonomy\Domestic_Cat_White.jpg
```

- **Example Path in MediaBeacon's "Long Name" field**

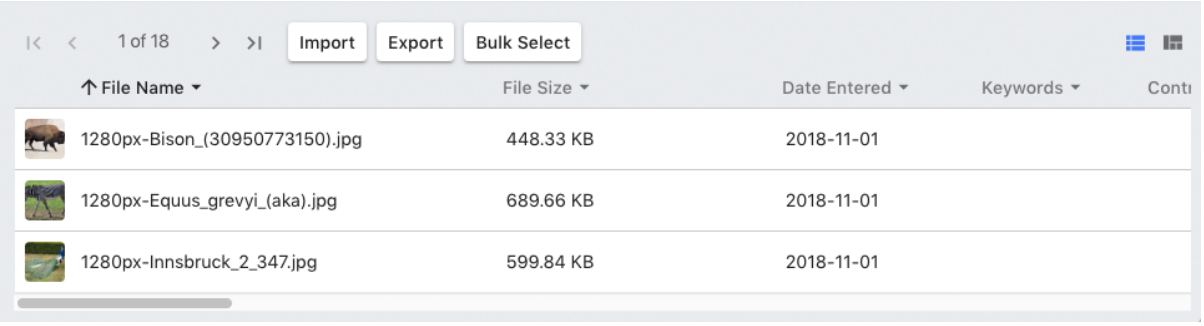
```
Archive/Biological Taxonomy/Domestic_Cat_White.jpg
```

- **Modified Path in Import File**

```
Archive/Biological Taxonomy/Domestic_Cat_White.jpg
```

Adjusting Width

If a large number of column headers are present, and the interface cannot display them given the size of the browser window, it may be useful to change the "Width" setting, located in the List Configuration dialog. This sets the List component to a fixed width of pixels, which will scroll horizontally.



Preparing Metadata Files

Guidelines for metadata to be used for Import.

When metadata is being imported into assets already ingested by MediaBeacon (the most typical metadata import), the disposition of import files must conform to specific standards.

Note: A good technique to use to determine the proper formatting for a metadata file is to perform an export of a representative subset of MediaBeacon asset metadata once the list component has been configured. See Using the Export Function for more.

Metadata File Terminology

Most of MediaBeacon's supported metadata file formats are character-delimited formats: CSV, Tab Delimited, and Custom Delimited. Below is a sample CSV file that illustrates several key concepts:

```
file_name,keyword_field,date_field,textarea_field
file01.jpg,keyword,2018-05-01,String of text
file02.jpg,"hello,world",2018-05-01,"Text that contains
an example of a line break."
file03.jpg,,yellow green,
file04.jpg,apples,2018-06-07,1234567890
```

- **Row**: Each line of text ending with a line break.
- **Record**: Generally, a row of text, delimited into fields. Some data types (textarea fields) may contain line breaks within values, causing a record to span multiple rows.
  - In a character-delimited files, it is very important that each record have the same number of fields per record, and that those fields are always in the same order for every record. Null values are used to accomplish this.
- **Fields**: Discrete sections of rows that contain values, separated by delimiters.
- **Delimiter:** The character sequence that defines the boundary between fields. Single comma and tab characters are common.
- **Value**: The substring of a particular row that exists in a particular field.
- **Null value**: Fields that contain no value still need to be represented in each record to maintain the ordering of fields in each record. This is expressed as two or more delimiters next to each other: For example, adjacent commas in a CSV file.

- **Column**: This refers to all values that exist in all records in the same position, e.g. every third field in every row.
- **Header** (aka header row): the first line in a character-delimited file does not contain a record of data, but a delimited sequence of values that serve as field identifiers. Best practice is to ensure that each of these is unique and known to correspond to a specific field in MediaBeacon.
- **Escape character** (aka text qualifier or enclosing character): When the boundaries of fields are ambiguous, this character is used to enclose the contents of a field, the straight double quote character (") is common.
- **Line break**: The non-printing character (or characters) that cause text to break onto the next line. This may variously be referred to as a "line feed" (aka "newline"), "carriage return", or "end of line". Keep in mind those terms refer to very specific and different ASCII characters that effect the line break used in different data standards. Best practice is to ensure line breaking is accomplished by the same method in all places in the metadata file.

XML files are also supported as metadata files, but are more complex and covered in more detail in the File Formats article.

Preparation Checklist

1. Choose a Key Field
2. Determine field identifiers
3. Determine column order
4. Check Character Encoding
5. Truncate length-delimited data
6. Check OS Localization
7. Check for Non-Printing Characters
8. Format Data Types
9. Use Appropriate File Format

Choose a Key Field

See the Choosing a Key Field section.

Determine Field Identifiers

CSV files (and other character-delimited formats) need to have **header row values** which identify metadata fields in MediaBeaconcorrespond to which column of **row values** in the metadata file. Below is an example of a CSV file formatted correctly.

```
file_name,http://purl.org/dc/elements/1.1/ subject,http://purl.org/dc/elements/1.1/
 title,http://purl.org/dc/elements/1.1/ date
file01.xmp,"hello,world",File One,2018-03-09
file02.xmp,Example_Keyword,File Two,2017-10-26
```

Header Row values can be defined in a number of ways:

- **Arbitrary Names**: Each column is given a title, but these are not synchronized to the MediaBeacon Field names in any particular way. This is **not recommended**, as it will require a manual rearrangement of the columns at time of import, introducing opportunity for human error.
- "**Namemapped Column Headings**": Each column is identified with the string used by MediaBeacon to identify a field. This is not considered best practice, since these names may not be unique.
- **XML Expanded Name**: This method (the default forMediaBeacon's Export function, and shown above) uses an unambiguous field identifier, and is recommended as a best practice.
  - Example: The Dublin Core Keywords field XML Expanded name (Schema URI + Internal Name) is: "*http://purl.org/dc/elements/1.1/* subject"

- Some database-only fields, such as File Name will not have an identifier in this format, such as "file_name", "record_id", and "long_name".

A quick method to get the correct list of XML Expanded names is to u the List component with the desired fields and then perform an Export on a single asset. The resulting CSV will have the expanded names in the header row.

Determine Column Order

It is best practice to have the metadata file's columns (sequence of fields in reach record) match the List component's column header arrangement. This includes:

- Order of columns
- Number of columns
- "Key field" as the leftmost field in each record

Although a metadata file's field values can be "soft arranged" or even ignored during Import, it adds unnecessary extra steps to the import process.

Care should be taken to avoid extra (empty) columns in your data. This can be identified in raw CSV data, by rows that contain adjacent commas (,,).

- If present in a header row, this may cause an error upon import. All field identifiers must be uniquely named with non-null values.
- If present in a record row, this indicates blank fields, which does not present a problem as long as field headers are correctly configured.

```
file_name,http://purl.org/dc/elements/1.1/ subject,,
file01.xmp,"hello,world",,
file02.xmp,Example_Keyword,,2017-10-26
```

Check Character Encoding

MediaBeacon is UTF-8 compliant and it is the best practice to ensure all metadata sources are kept in that encoding during all operations prior to Import.

Main Article: Character Encoding

Truncate Link Delimited Data

Some metadata sources (usually databases) may store data in **length delimited fields**. This type of data construction stores different "fields" in a single long string, writing each piece of data to a given segment. Segments are often 64 characters in length, but have no "breaking" characters to indicate where these breaks are.

- Character delimited records:

```
2018-01-01,hello
```

- Length delimited records (spaces are simulated with underscore characters in this example):

```
2018-01-01_____________________________________________________hello_____________________________
```

MediaBeaconrequires character delimited files (or XML): CSV, Tab delimited or custom delimited. When processing a length delimited source, **any extra spaces should be removed** otherwise they will be recorded as part of the metadata values.

Format Datatypes

Certain types of data are expected to be in a specific format:

- **Date** fields must be in *ISO 8601* format (2018-01-01).
  - Note: MediaBeacon 2019.2+ has the ability to import and convert dates in MM/DD/YYYY format. We recommend using ISO 8601, however since it in unambiguous.
- **Multivalue*** fields must be escaped in (non-curly) double quotes:

```
"Hello,world"
```

- **Multiline*** (textarea) fields must be escaped in (noncurly) double quotes:

```
"I do not think I shall ever see
A poem as lovely as a tree."
```

- Strings that contain the **delimiting or escaping characters*** (,and " respectively for CSV format) must be properly formatted.
  - "Hello" is represented by """"Hello""""
  - A value of Jane, Doe would be written as "Doe\, Jane"
- Curly quotes: Beware of the incorrect type of double-quotes being used as the escape character (aka text qualifier) in CSV (or other character delimited filetypes)

* These restrictions apply to character-delimited file formats, XML files are structured differently. See the File Formats article for more info.

Check OS Localization

Non-English language settings may cause issues with importing and exporting CSV files. This is due to some localizations using a non-comma character in the "List separator" setting.

This may be remedied by using the English localization, or setting "List separator" to the comma (,) character.

Check for non-printing Characters

Data from some metadata sources can contain non-printing unicode characters that can be misinterpreted when importing text and should be purged whenever possible.

- Non-Printing / *Control characters* including, but not limited to:
  - File Separator "FS" (U+001C)
  - Group Separator "GS" (U+001D)
  - Record Separator "RS" (U+001E)
  - Unit Separator "US" (U+001F)
- Line Break characters:
  - Some metadata sources use different non-printing characters or sometimes multiple unicode characters to represent a single line break. This can sometimes manifest as different line breaking character sequences for textarea values than what is used to line break records. These should be synchronised if a mismatch occurs.
    - Windows "CRLF" (carriage return, line feed)
    - Unix / macOS "LF" (line feed)
    - Mac OS 9: "CR" (carriage return, very uncommon)

Use Appropriate File Format

Main Article: *File Formats*

3.15.2. Wizard Use

These articles cover the use of these individual functions in depth.

Using Bulk Select

This article details the use of the Bulk Select wizard function.

The bulk select function is a specialized type of search that allows users to find and select assets using an arbitrarily large list of values. The intended result of this type of search is to select as many asset as are on the list. A good example is a list of product SKU identifiers that may be unique or near-unique per asset.

Requirements

- Header values in metadata files used with bulk select cannot be "namemapped" (use Display Names), unless it is a "database" field.
  - XMP Expanded names are required. These are composed of the "Schema" string and the "Internal Name" string, separated by 1 space. Example: http://ns.mediabeacon.com/en/example/ examplefield.
  - Database fields are not XMP metadata, and do not have schema. Examples: of Display Name and Internal Name for some of these fields: File Name (file_name), Record ID (record_id), File Size (file_size), Date Entered (date_entered), Long Name (long_name)
- Metadata columns must be in the same order as the List component at the time of metadata file upload.

Sequence

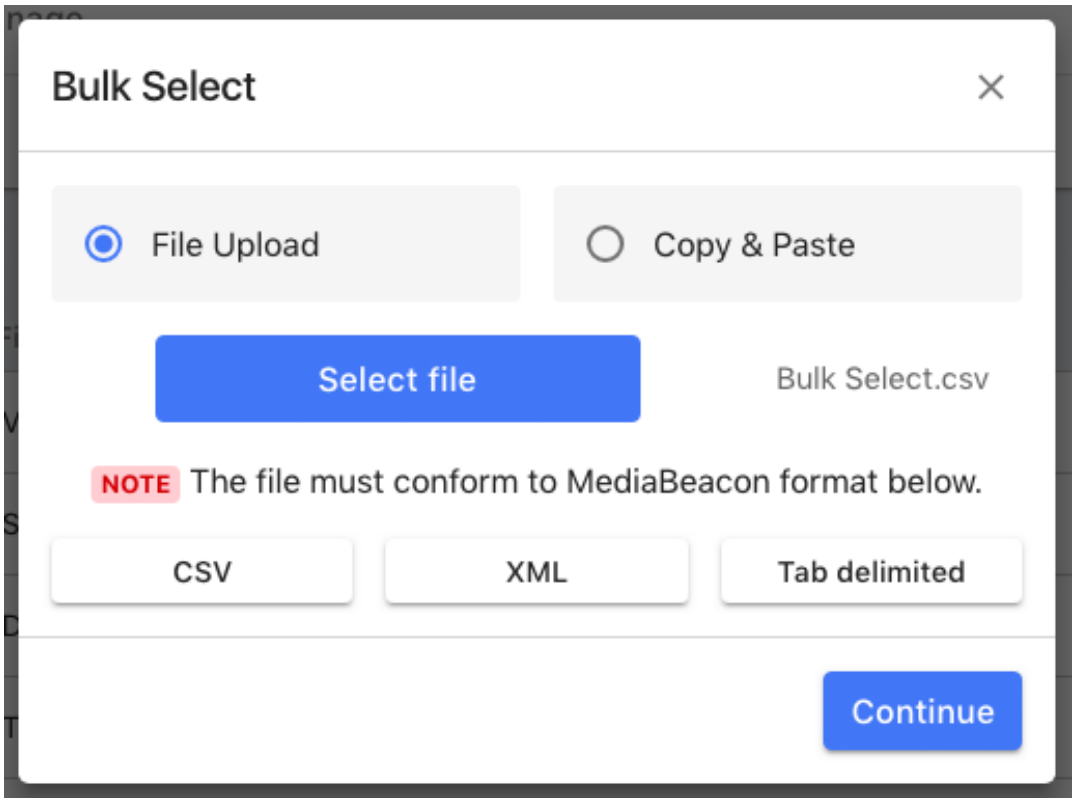
1. Prepare Metadata Source
2. Begin Bulk Select
3. Choose Bulk Select Options
4. Commit Bulk Select

Prepare Metadata File

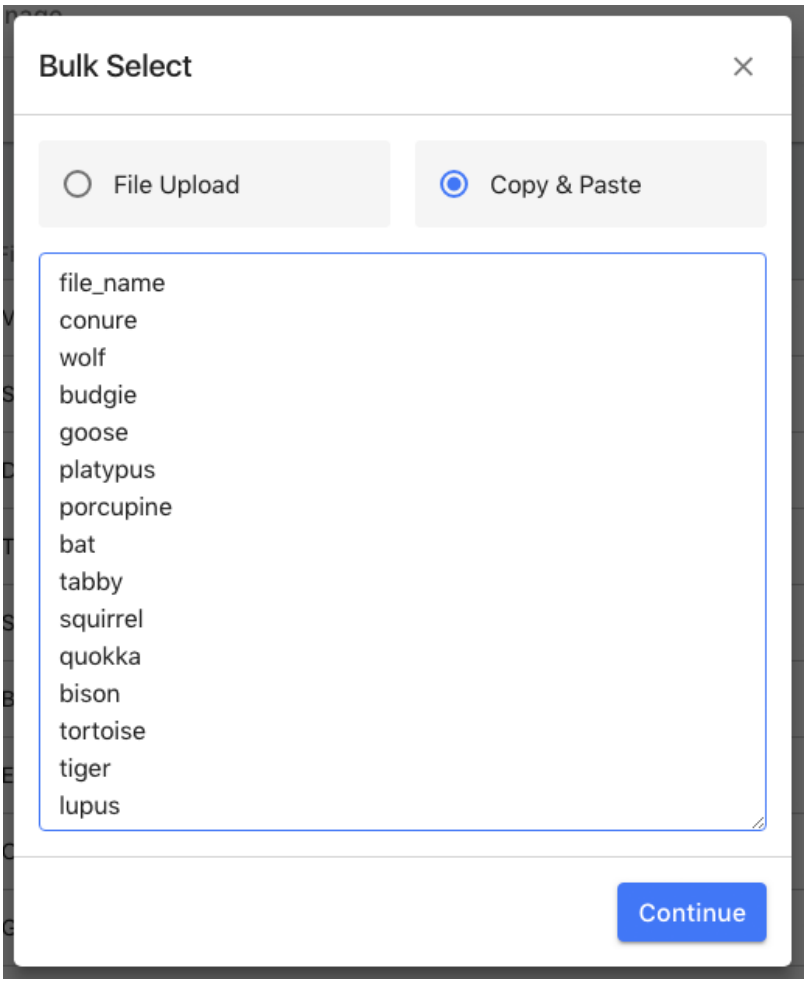
Often, metadata files used with Bulk Select are only a single column of data, although they are not required to be. One requirement that is mandatory is having XMP Expanded names used in the header row of the metadata file. Namemapped header values are not valid and will cause incorrect selections.

Begin Bulk Select

Click "Bulk Select" to open the Bulk Select Dialog.



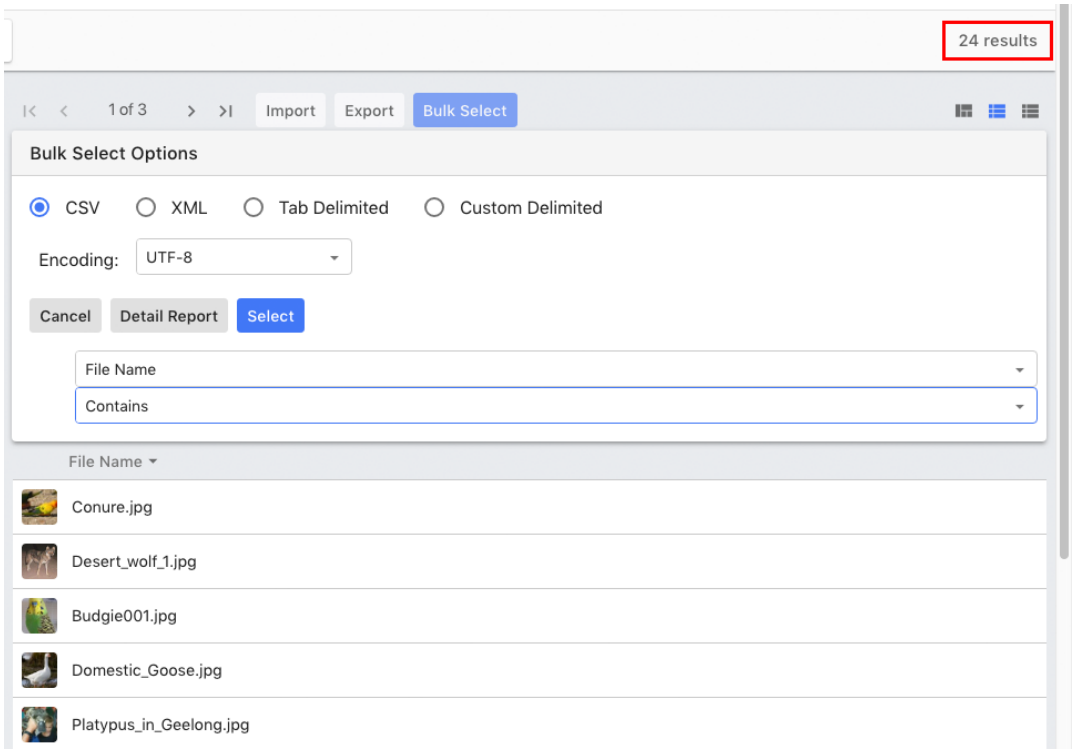
- **File Upload** (default): Click "**Select File**" to choose a metadata file containing the list of values to search for
- **Copy & Paste**: This option allows the user to paste a copied text to use as the metadata file. This must still conform to the metadata file requirements, above



- **Continue**: Proceed to the next step. This will open the Bulk Select options panel above the List component.

Note: Most prior search criteria are cleared before bulk select begins, but search criteria from the directory browser must be cleared in order for bulk select to operate properly.

Choose Bulk Select Options



This panel is displayed to allow the user to choose bulk selection options. The assets in the List component will be filtered based on what will be selected given the current options. While usually Multiple columns may be used to make matches (set as key fields) in a bulk select.

Of note, when options are changed, the number of results will be changed to reflect the assets to be selected.

- **Format** (CSV, XML, Tab Delimited, Custom Delimited): This determines the file format of the metadata file. "CSV" or "Tab Delimited" are the most often used. See the File Formats article for more information.

- **Encoding:** MediaBeacon can output in a variety of encodings, but UTF-8 is our best practice recommendation, especially for reuse of this data as an import to MediaBeacon.

- Buttons
  - **Cancel**: Cancels the Export.
  - **Details Report:** Downloads a report detailing:
    - Rows matching previously matched assets
    - Rows matching multiple assets
    - Rows matching match any assets
    - **Select**: Exits the Bulk Select options and performs the asset selection.
  - **Input Field Menus** (upper): Indicates the order of fields in the metadata file. Bulk select cannot rearrange columns dynamically. They must match the order of the List component's column headers.
  - **Matching Combinator Menu** (lower): Defines how a field inMediaBeacon is matched to the values present in the metadata file.

Note: Exact matches are performed as case insensitive, so "A" and "a" both match and are matched to "A" or "a".

- **No Action**: This column of data is ignored.
- **Equals** (default): Exact match between metadata file value and existing value.
- **Contains**: Matches when the asset value *contains* the metadata file value.
  - Example: (Asset Field)(Combinator)(Metadata File Value)"aubergine.jpg" CONTAINS "gine.jpg"
- **Is Contained By**: Matches when the metadata file value *is contained within* the existing value.
  - Example:(Asset Field)(Combinator)(Metadata File Value)"gine.jpg" IS CONTAINED BY "aubergine.jpg"

Commit Bulk Select

After clicking the "Select" button, the assets previewed in Bulk Select Options will become selected. Note that this is an asset selection and is not a saved selection, which is a separate step.

Using the Export Function

This article details the use of the Export wizard function.

Sequence

1. Choose Initial Asset Scope
2. Begin Export
3. Choose Export Options
4. Click "Export" at bottom of the Export Options panel to download the specified file.
   a. Note: this export file is not saved as an asset within MediaBeacon.

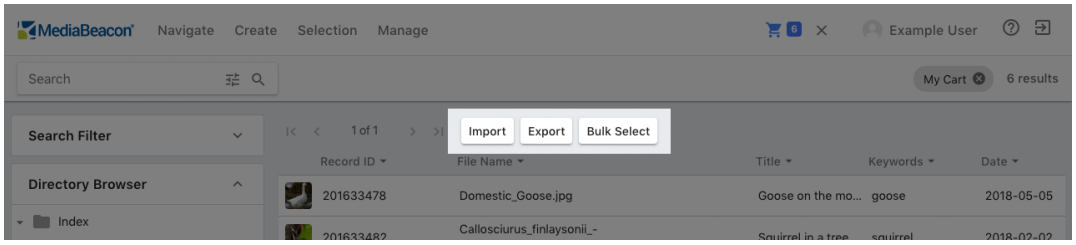
Choose Initial Asset Scope

Choose a scope of assets: Narrow the results of export by searching or filtering results in the Current View.

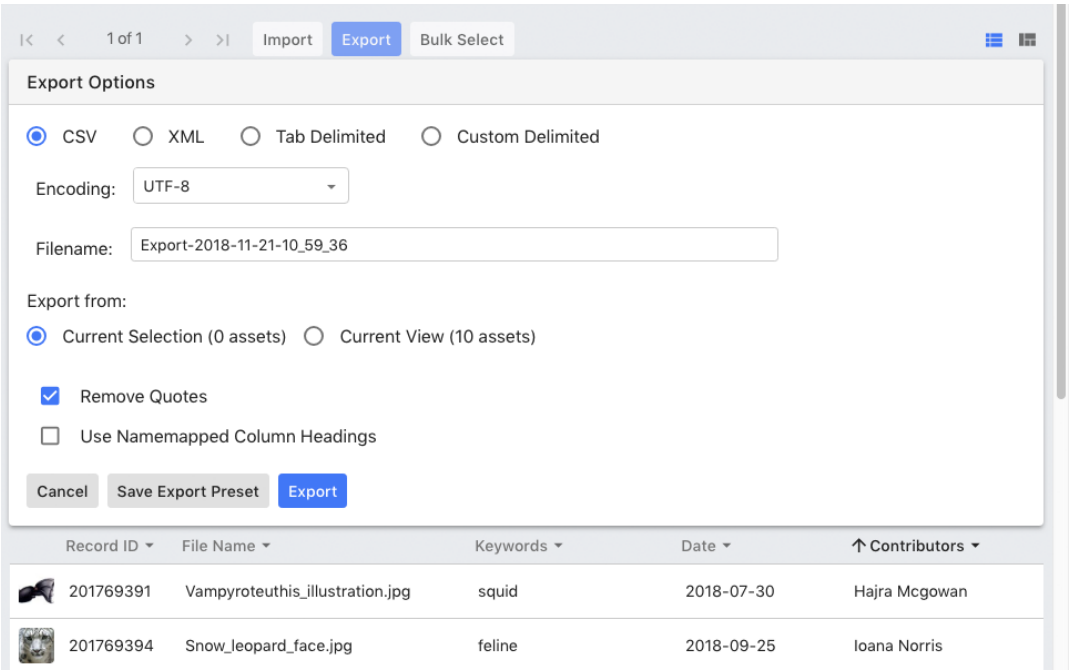
A good practice is to save the assets that will be used in the export as a Saved Selection. This enables the same asset set to be recalled for later use with an metadata import to the same set.

Begin Export

Click the "Export" button. This displays the export options panel above the column headers of the List component.



Choose Export Options



- Format **(CSV, XML, Tab Delimited, Custom Delimited):** This determines the file format of the metadata file. "CSV" or "Tab Delimited" are the most often used. See the File Formats article for more information.
- **Encoding:** MediaBeacon can output in a variety of encodings, but UTF-8 is our best practice recommendation, especially for reuse of this data as an import to MediaBeacon.
- **Filename:** The name of the downloaded file.
- **Export from:**
  - Current Selection: Metadata from assets in the current selection are exported.
  - Current View: Metadata from all assets in the current view are exported.

  Note: While the Export Options panel is open, it is still possible to search, filter, and select assets

- Options
  - **Remove Quotes** (checked by default): If unchecked, this option will add double-quote characters around every field's data, even blank ones. It is generally unnecessary to include them and removing them is the default.
    - Even when quotes are removed, fields in text area or comma separated values will still be surrounded by quotes, as these data types require them.
  - **Use Namemapped Column Headings**: this option outputs the header line of the file with Display names instead of XML Expanded names. It's best practice to leave this option off.
    - Unchecked: "*http://purl.org/dc/elements/1.1/* subject".
      - hecked: "Keywords".
- Buttons

- **Cancel**: Cancels the Export.
- **Save Export Preset**: See the Import/Export Presets article for more information.
- **Export**: Downloads the an export file with the selected parameters to the user's computer. This file is not stored as an asset.

Commit Export

Clicking the "Export" button finalizes the export and begins processing and download of the export file.

Using the Import Function

This article details the use of the Import wizard function.

Sequence

Below is the sequence steps in Importing metadata. Note that at this point, the List component should be configured to match the metadata file. See *Configuring the List Component* and *Preparing Metadata Files* on page 238 to accomplish these steps:

1. Choose Initial asset scope
2. Begin Import
3. Import Options Panel
   a. Configure Field Actions for Header Columns
4. Check Import Preview
5. Commit Metadata Import

The Upload Import File dialog will be displayed allowing the user to choose a few options:

Choose Initial Asset Scope

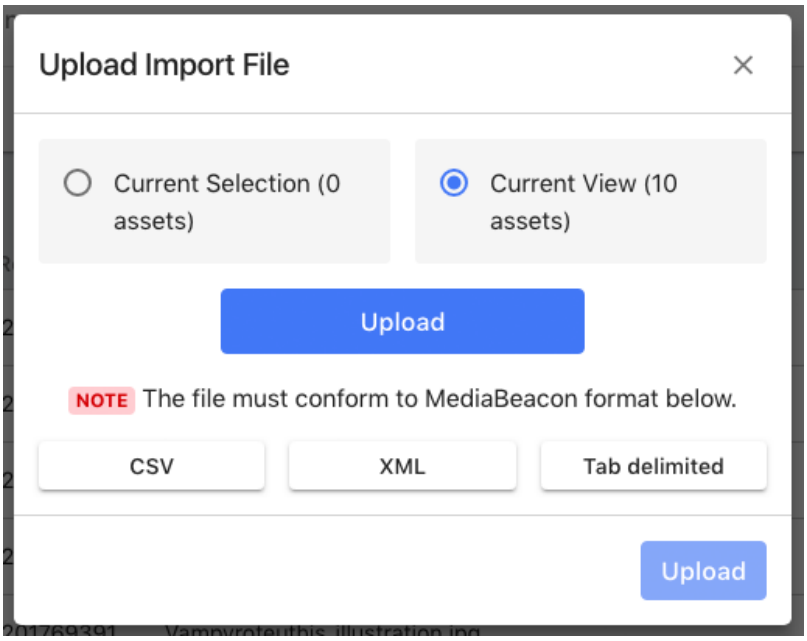
The metadata import function will often be in bulk actions, using metadata files that containing many records, which are used to correlate with an asset set that is often even larger.

For maximum efficiency, the best practice approach is to prefilter the scope of assets to be acted upon. This can be done by asset selection or searching and/or filtering the current view.

Ideally, this set of assets was saved previously as an asset selection. This is preferred over a saved search because metadata changes may alter the list of assets.

Begin Import

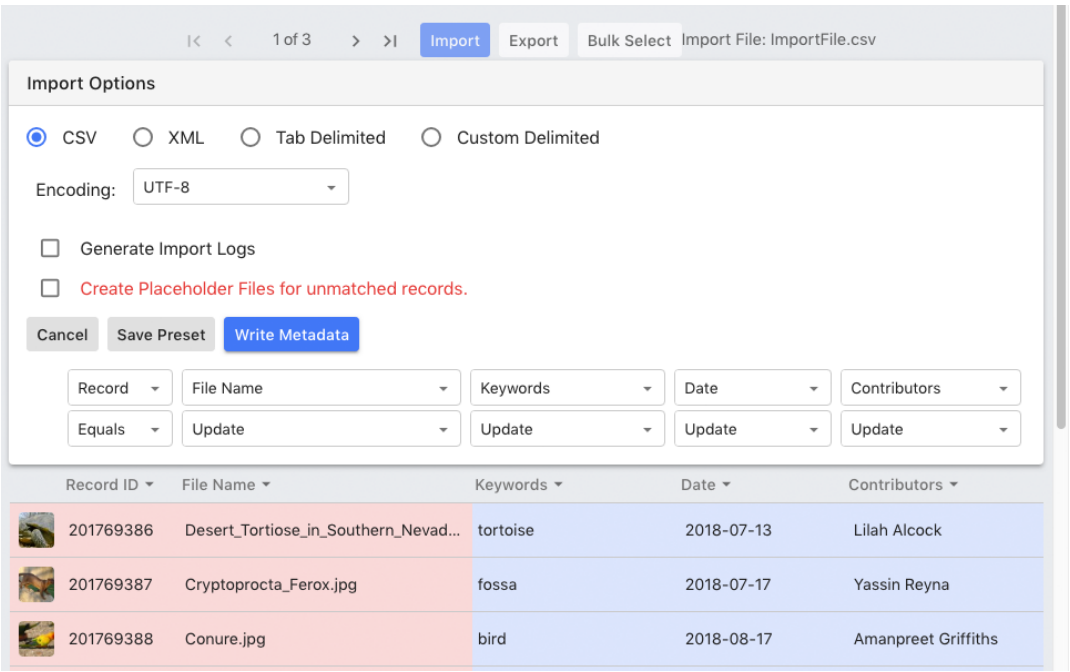
To begin an import of metadata to assets, The user will click the "Import" button in the List component. This displays the "Upload Import File" dialog.



Upload Import File Dialog

- **Current Selection** and **Current View:** These buttons allow the user to narrow the scope of the initial metadata import file.
  - To efficiently process a metadata import that has a large number of target assets and/or records, the best approach is to narrow the number of target assets in the current view **prior to opening this dialog.** It is ideal to filter, as close as possible, to only those assets listed in the metadata source.
- **Upload** (upper button)**:** allows the user to choose the metadata import file. This upload is temporary for the purposes of the import, and is not retained as an asset.
  - Metadata source files will be expected to have the correct file extensions, .csv, .xml, and .txt (for Tab or Custom delimited)
- **Upload** (lower button): Begins the import process. The Export Options panel will be displayed.

Import Options Panel

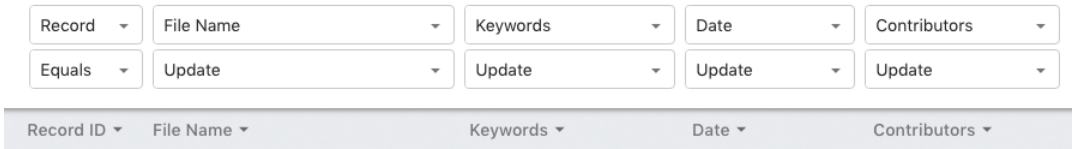


- **CSV**, **XML**, **Tab Delimited**: The import process will preselect the expected type, based on file extension.
  - It is generally unnecessary to change this setting, unless a metadata file has an incorrect or missing file extension, or to choose between tab delimited and custom delimited metadata files (both may have .txt file extensions)
- **Encoding:** This setting defaults to our expected encoding, UTF-8. As long as care had been taken to ensure the correct encoding, this should remain at this setting
- **Generate Import Logs:** This option generates logs in .csv format as assets in the system. They will be placed in the root "Index/" folder, in a time-stamped "Import_Log" folder.
  - RowMatchedSingleUpdated.csv
    - Lists rows in the metadata file that matched single assets.
    - Each line in this file has Record ID as the first column, followed by the complete line that matched that asset from the metadata file.
  - RowMatchedMultipleUpdated.csv
    - Lists rows in the metadata file that matched multiple assets.
    - Each line in this file has Record ID as the first column, followed by the complete line that matched that asset from the metadata file.
  - RowsMatchedSingleUpdated.csv
    - Lists assets that were matched by multiple rows (lines) in the metadata file.
    - This can indicate an issue if the "overwrite" option is selected for fields.
    - Each line in this file has the same Record ID as the first column, followed by the complete line that matched that asset from the metadata file.
  - UnmatchedNotCreated.csv
    - Rows in the metadata file that were not matched to assets.

- UnmatchedCreated.csv
  - Rows in the metadata file that were not matched to assets and were used to generate Data Only assets.
- Error.csv
  - Lists other errors that occurred during the import.

- **Create Placeholder Files for unmatched records:** Whenever a row is unmatched, enabling this option will create a new data-only asset per row. See the Advanced Import Techniques article for more information.
- Buttons
  - **Cancel:** Cancels the Import.
  - **Save Import Preset**: See the [Import/Export Presets] article for more information.
  - **Write Metadata:** Begins the metadata import, progress is shown in the Notification Center and also in the System Status "File Action Queue" Tab.
    - **Field Action section:** See Configure Field Actions for Header Columns section, below.

Configure Field Actions for Header Columns



The Field Action section displays two pulldown menus per column header.

1. **Input Field Assignment Menu** (upper): Assigns a specific column in the metadata file to correspond to a field defined by the column header in the List component.
   a. The entries here initially match the order of input fields present in the metadata file.
   b. Any input field may be assigned to any column by choosing it from this menu. The two input fields then swap position. This effectively rearranges the metadata file's column order.
   c. It's best practice to align the order of the List component's column headers and and the columns of the metadata file prior to this stage, if possible.
   d. If XMP Expanded names (such as "*http://purl.org/dc/elements/1.1/* subject") are used to name columns in the metadata file, MediaBeacon will display them as their corresponding "Display Name" whenever possible.
2. **Input Field Action Menu** (lower): Per column, assigns a specific action to be performed between input fields and target fields.
   a. **Metadata Write Actions**
      a. **No Action**: This column of data is ignored.
      b. **Update**: This is the default action for most fields. It will write only into null-value fields. An exception is the case of CSV fields, where this operation will add the metadata file values to those already present.
      c. **Overwrite**: This action will overwrite any value with the metadata file value, even null-values.

b. **Key Field Combinators**: Any of the following selectors are used to define a field as the key field, the field used to match records to assets. The leftmost column is initially set to "Equals", as an exact match is the most common use case.

> **Note:** Exact matches are performed as case insensitive, so "A" and "a" both match and are matched to "A" or "a".

a. **Equals** (default): Exact match between import value and existing value.
b. **Starts With**: Matches when the asset value *starts with* the import value.
c. **Is the Start Of**: Matches when the import value *is the start of* the existing value.
d. **Ends With**: Matches when the asset value *ends with* the import value.
e. **Is the End Of**: Matches when the import value *is the end of* the existing value.
f. **Contains**: Matches when the asset value *contains* the import value.
g. **Is Contained By**: Matches when the import value *is contained within* the existing value.

c. **Note:** multiple key fields can be designated, although the most common practice is to match on one field.

3. Usage Notes

a. "Soft rearranging" columns in the metadata file can be accomplished by choosing different Input Fields for different header columns.
b. Multiple key fields may be defined beyond the leftmost column. Choose any of the key field combinators to assign a field as a key field.

Check Import Preview

Changing options in the Import Options Panel will cause the assets shown in the List component to update in various ways.

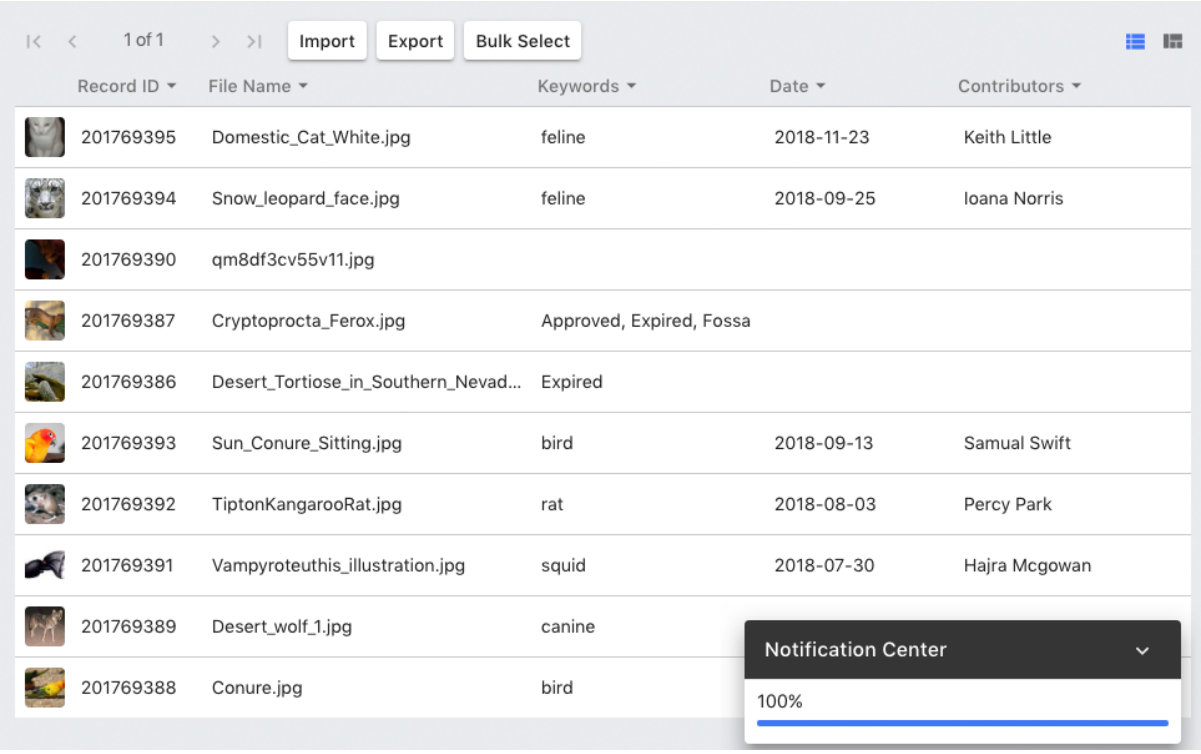
Record ID	File Name	Keywords	Date	Contributors
	UnmatchedRecord.jpg			
201769390	qm8df3cv55v11.jpg			
201769386	Desert_Tortiose_in_Southern_Nevad...	Expired		
201769389	Desert_wolf_1.jpg	canine		
201769388	Conure.jpg	bird	2018-08-17	
201769391	Vampyroteuthis_illustration.jpg	squid	2018-07-30	Hajra Mcgowan
201769392	TiptonKangarooRat.jpg	rat	2018-08-03	Percy Park
201769393	Sun_Conure_Sitting.jpg	bird	2018-09-13	Samual Swift

- **Non-Highlighted Asset:** The asset has been matched to a row in the metadata file, but no metadata is being changed by the Import.
- **Red Highlight Flag** (in upper left corner): this indicates an unmatched record. No metadata will be written unless the "Create Placeholder Files for unmatched records" option is checked.
- **Pink Background Highlight**: Indicates that some field in the asset will be written to.
- **Blue Background Highlight**: Indicates that field is being written to as part of the Import. The new values will be displayed.

Commit Metadata Import

Once ready, click the "Write Metadata" button. The import will begin.

Progress will be shown in the Notification center.



Logging out will not affect the progress of the metadata write, but this will hide the notification center progress. To view bulk actions of this kind, use the "File Action Queue" tab in the System Status dialog.

Import Presets

Main Article: *Import/Export Wizard Presets*

3.15.3. Reference

These articles cover fundamental data structure concepts and common optional functions.

Character Encoding

This article details character encoding as it relates to Import/Export Wizard functions.

Character encodings are the standards used to encode/decode binary data to/from specific text characters. Older standards tend to define smaller lists of characters, focused on letters, numbers, and symbols used primarily in English. Modern encodings, on the other hand encompass much larger lists of characters, and are standardized across computer platforms, national borders, and languages.

Text in a less-compliant encoding may contain "extended" characters that can become damaged when extracting metadata from an original source, or be unable to represent properly characters from a more compliant encoding.

Examples of Extended Characters

- Characters outside of the standard ASCII character set (only 256 characters)
- Characters with diacritics (ÀàÂâÇçÈèÉéÊêËëÎîÏïÔôÙùÛûÜüŸÿ)
- Latin Extended characters (þÞðĐ##ƒ##)
- Characters in non-latin writing systems (##, ##########, ##, ###, #########, #####, ########)
- Curly quotes and symbols
- Characters with diacritics
- Curly quotes (‘ ’ “ ”)
- Symbols (€¢£¥§©®°¶)

MediaBeacon is *UTF-8* compliant which supports the full range of characters in the *Unicode* specification, and maintaining that encoding in **all steps of data processing** is our best practice standard. Other character encodings cannot accurately record all UTF-8 characters. Here are some examples of issues that can arise when text that contains extended characters are saved in a non-UTF-8 encoding, and importing them, but assuming they are in UTF-8:

- UTF-8 Characters: åçðéîøü
- Opened as ASCII: Ã¥Ã§âˆ, Ã©Ã®Ã¸Ã¼
- Opened as MacRoman: √•√ß, àÇ√©√Æ√∏√º
- Opened as ANSI: Ã¥Ã§âˆ, Ã©Ã®Ã¸Ã¼

Various Diacritics and Character Sets

French Diacritics: ÀàÂâÇçÈèÉéÊêËëÎîÏïÔôÙùÛûÜüŸÿ

Spanish Diacritics: ÁáÉéÍíÑñÓóÚúÜü

Italian Diacritics: ÈèÉéÌìÎîÒòÙù

Portuguese Diacritics: ÁáÂâÃãÀàÇçÉéÊêÍíÓóÔôÕõÚú

Greek Characters & Diacritics:

######Δ################μ#######π####/
###########Ω####################

Cyrillic Characters & Diacritics:

##

File Formats

This article details the file formats that can be used with Import/Export Wizard functions.

- Character-Delimited
  - CSV
  - Tab Delimited
  - Custom Delimited
- XML

Metadata File Terminology

The Metadata File Terminology in *Preparing Metadata Files* on page 238 section for a complete list.

CSV

This widely used format is fairly standardized, a guide Care must be taken with this format because common editing tools, like Microsoft Excel, will silently change data formatting with little warning. See the Manipulating Metadata Files and the Opening CSV files with Excel's Data Import Function articles.

CSV (comma separated values) is the most commonly used variant.

- When to use Escape Characters:
  - A value contains the comma character
  - A value contains double-quotes
  - A value contains line breaks
- Escape Characters are discarded: Delimiters will be parsed and discarded byMediaBeacon.

Caveats

MediaBeacon **does not** ignore white-space that might be imparted by a length delimited source. Spaces will be retained in values, whether or not the value is escaped.

Extension

File Extension is .CSV

Tab Delimited

Also known as Tab-separated, this format is a good alternative to CSV:

Pros

Commas in values do not need to be escaped

Caveats

- MediaBeacon still requires escape characters around line breaks
- The tab character, although rare in most value would need to be escaped

Extension

File Extension is .TSV or .TXT

Custom Delimit

This format allows the user to choose a "delimiter" character (the character that separates each field, and a "escape" character (the character that prevents usage of the delimiter character in values being misinterpreted.) if a comma (,) and double straight quotes (") are used in these areas respectively, the format is the same as CSV.

Extension

File Extension is .TXT

XML

This is a more structured format than the character-delimited types. Microsoft Excel will not correctly import this data, as its XML format is not similar.MediaBeacon outputs XML in a compressed format, but respects formatting white-space.

```
<?xml version="1.0" ?>
    <Assets>
        <Metadata>
            <Field name="file_name">file01.xmp</Field>
            <Field name="http://purl.org/dc/elements/1.1/ title">åéîøüð¥ Tab Character:
 </Field>
            <Field name="http://purl.org/dc/elements/1.1/ subject">Hello,World</Field>
```

```
            <Field name="http://purl.org/dc/elements/1.1/ description">Line1
Line2
Line3</Field>
            <Field name="http://purl.org/dc/elements/1.1/ date">2018-10-25</Field>
        </Metadata>
</Assets>
```

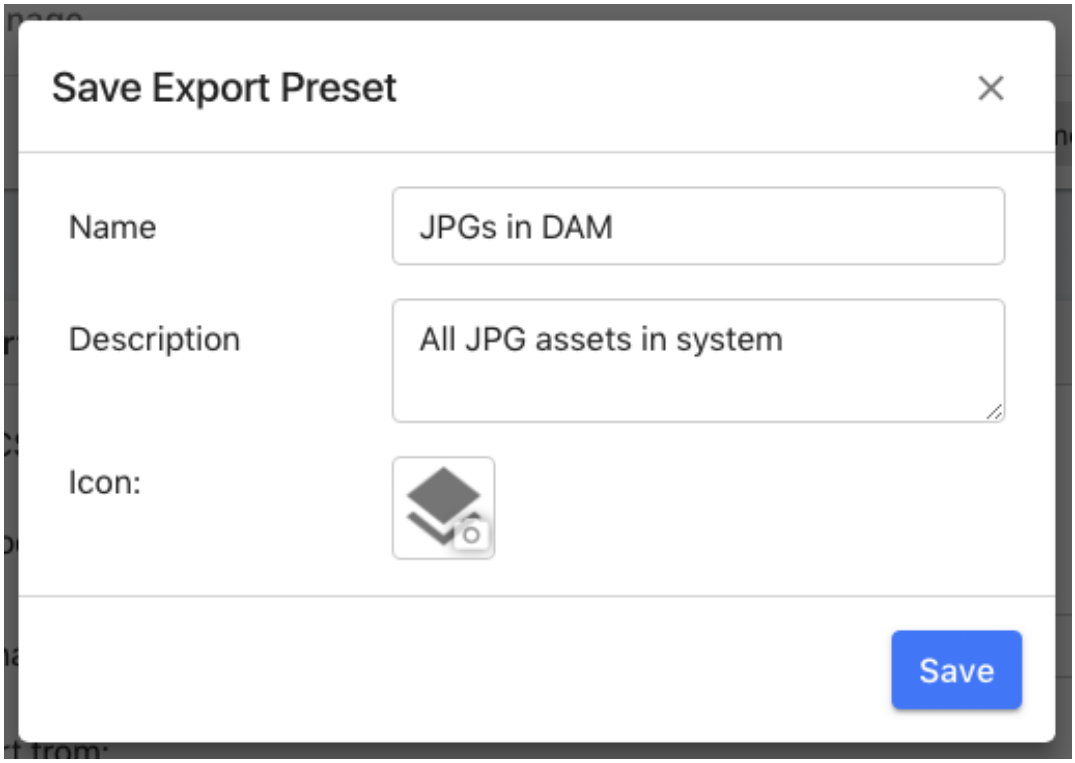
- The date is overall enclosed in the Asset tag. One set per XML File.
- Each record is enclosed in a "Metadata" tag
- There is no "header row", instead each "Field" tag has a "name" identifier.
  - These should match in position, and name for all "Metadata" objects

Import/Export Wizard Presets

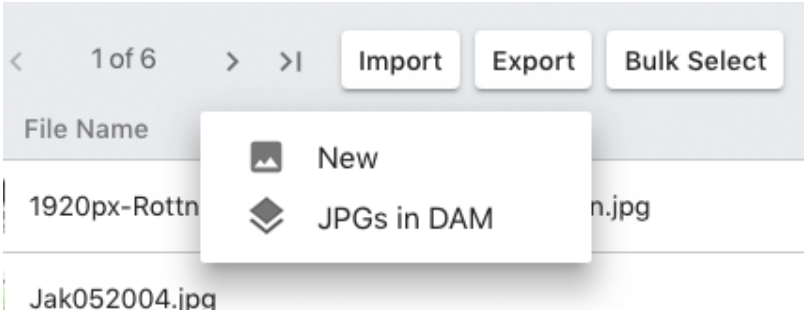
Saving and recalling specific Import/Export wizard parameters.

The parameters of the Import or Export Options panel may be saved for later re-use:

1. To save the current parameters of Import or Export Options:
   a. Click the "Save preset" button, the Save Export Preset will open.

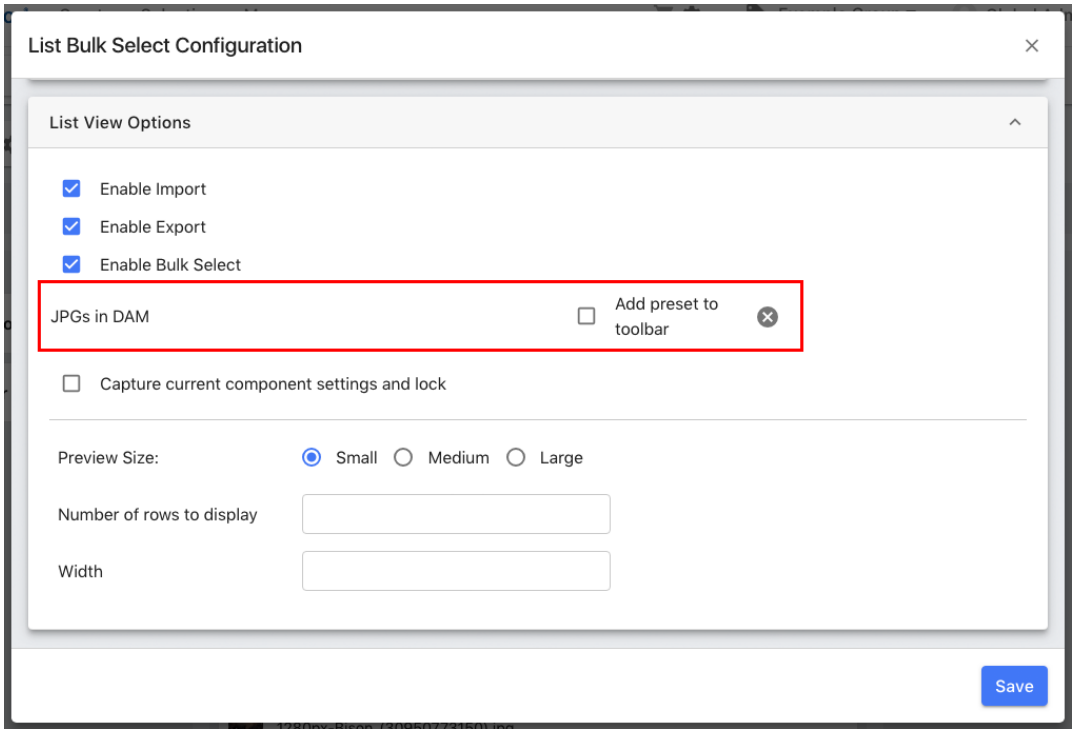


   b. Enter preset "Name".
   c. Enter preset "Description", optional.
   d. Select preset "Icon", optional.
2. Once presets have been saved, they are shown in a menu that is displayed when clicking the "Import" or "Export" button, along with a "New" command.

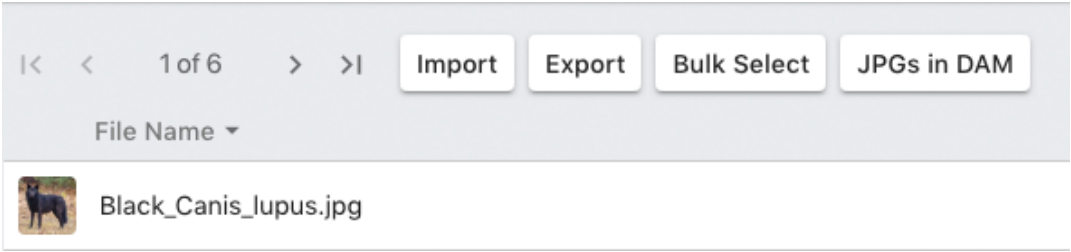


a. Choosing a preset will open the Import or Export Options panel with the previous parameters selected.

3. Presets may be managed in the List component's configuration. They are displayed in List View Options.



a. The "Add preset to toolbar" option will display that preset with the other wizard buttons.



b. Presets can be deleted by clicking the "circle X" icon the preset's right.

c. Optional: The "Import" or "Export" option can be disabled while still showing an export preset button.

Note:

Export presets are confined to the specific list component they were saved with. Other list component do not share them. Presets do not record the Column Headers of a List component.

Manipulating Metadata Files

Best practices on metadata file editing.

When editing metadata files, the files that MediaBeacon will use as input for Import or Bulk Select, there are a best practices for specific editors. Please note that this is not an endorsement of these products, and they are property of their respective companies.

Microsoft Excel

- Don't allow Excel to open character-delimited files directly. Many users will have Excel set as the default application for CSV files, and are used to opening them without realizing that Excel changes data in CSV files as part of then opening process. Excel is known to:
  - Misinterpret UTF-8 characters
  - Assume date formatting and alter data format silently. A value like "2018-10-08", may get changed to "10/8/2018"
  - Automatic incorrect formatting of numeric fractions as date values, "1/2" becomes "1/2/2018"
  - Each time an Excel file opens a CSV, it will make the same mistakes, as noted above. A best practice is to save the correctly-formatted file as a native Excel file, and export CSV copies for use as metadata files for MediaBeacon.
- Excel's XML format is not directly compatible with MediaBeacon.

Workarounds For Excel

- Correcting after opening
  - Date fields can be corrected by applying a custom cell format (yyyy-mm-dd) before saving.
- Correcting via Data Import
  - This is the best practice recommendation, see the Opening CSV files with Excel's Data Import Function article.

OpenRefine

OpenRefine is a free software tool from Google, that can be very good for cleaning up CSV style data, without having to use something like Excel. It has a steeper learning curve, but can perform many complex operations easily.

Plain Text Editors

Sometimes, it becomes preferable to inspect or manipulate a CSV file (or other character-delimited file) and avoid reinterpretation by another pieces of software. In these cases, a plain text editor is required. These editors are contrasted with and are **not** interchangeable with "rich text" editors, such as Microsoft Word, or WordPad.

Sublime Text 3

A highly extensible cross platform editor that be used to:

- Verify original character encoding without alteration.
- Find and correct formatting issues.
- Find and replace non-printing characters, or any other characters using RegEx.
- Manipulate files in a very low-level way.

Sublime Text 3 also has a large community of developers, who create "Packages" that install in seconds, and provide extended functionality for manipulating text.

Notepad ++

A Windows-only plain text editor. Not as extensible, but often used to edit server configured files.

Opening CSV Files with Excel's Data Import Function

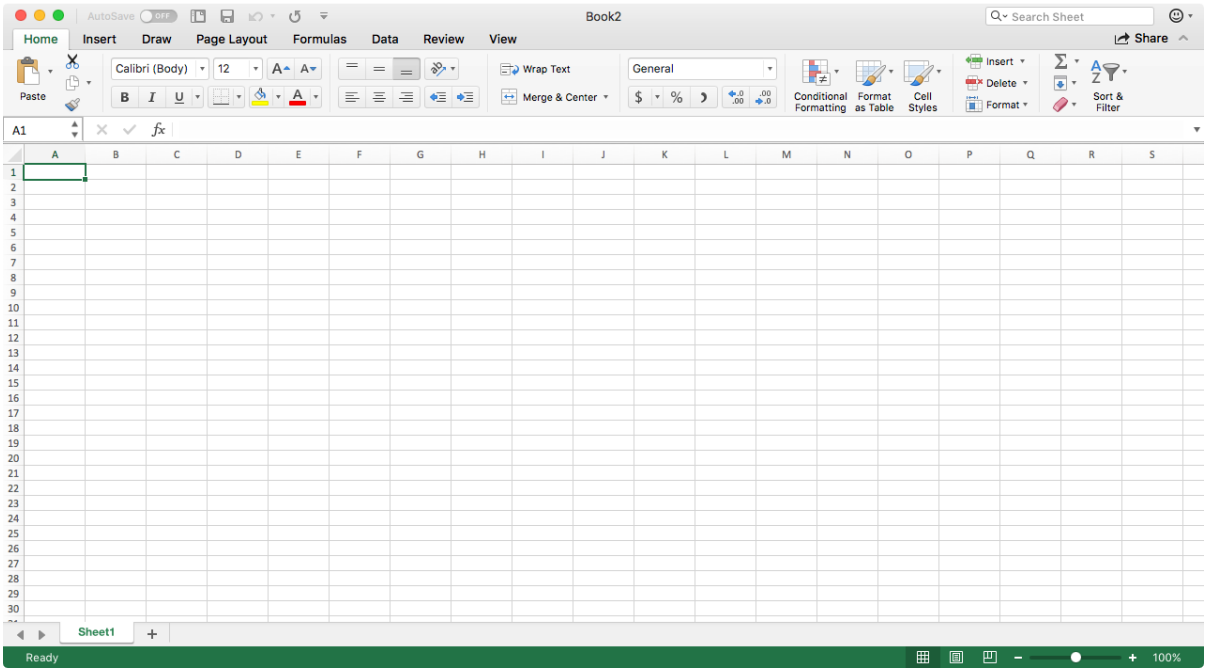
Step by step sequence to importing CSV in Excel.

Note: Our recommendation is to NOT open a CSV file directly in Microsoft Excel, but to use Data Import. This ensures data remains consistent.

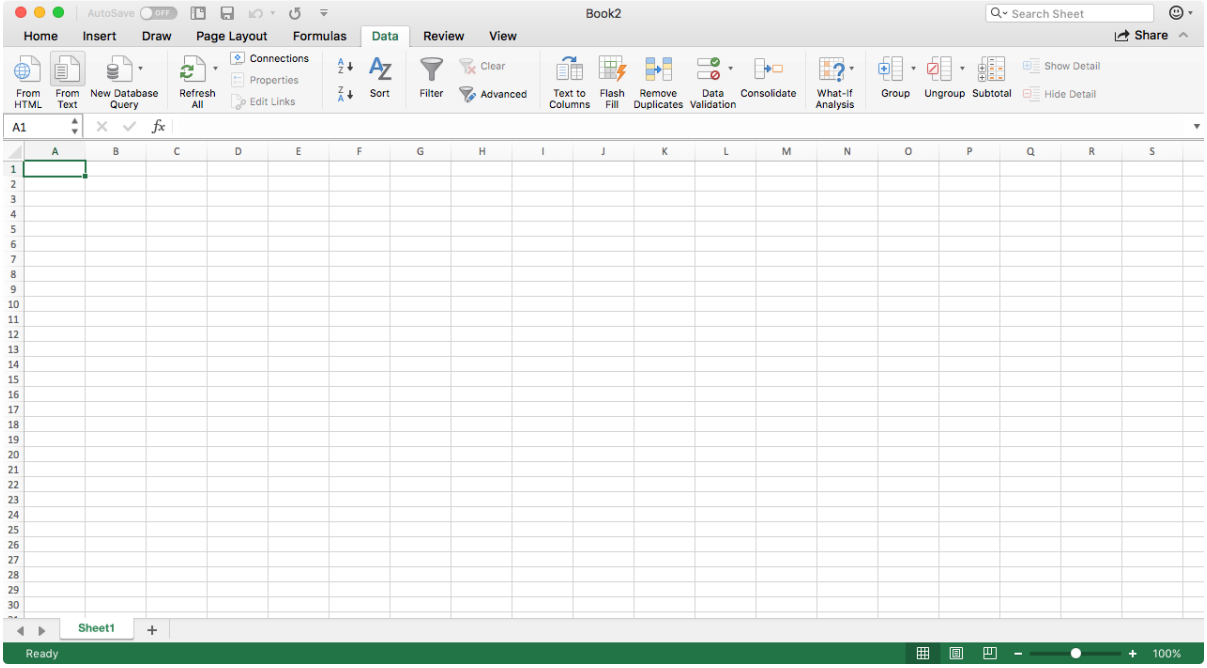
Data Import of a CSV file In Excel

Instructions consistent with Microsoft Excel for Mac, version 16.18 (181014), but is general for other versions.

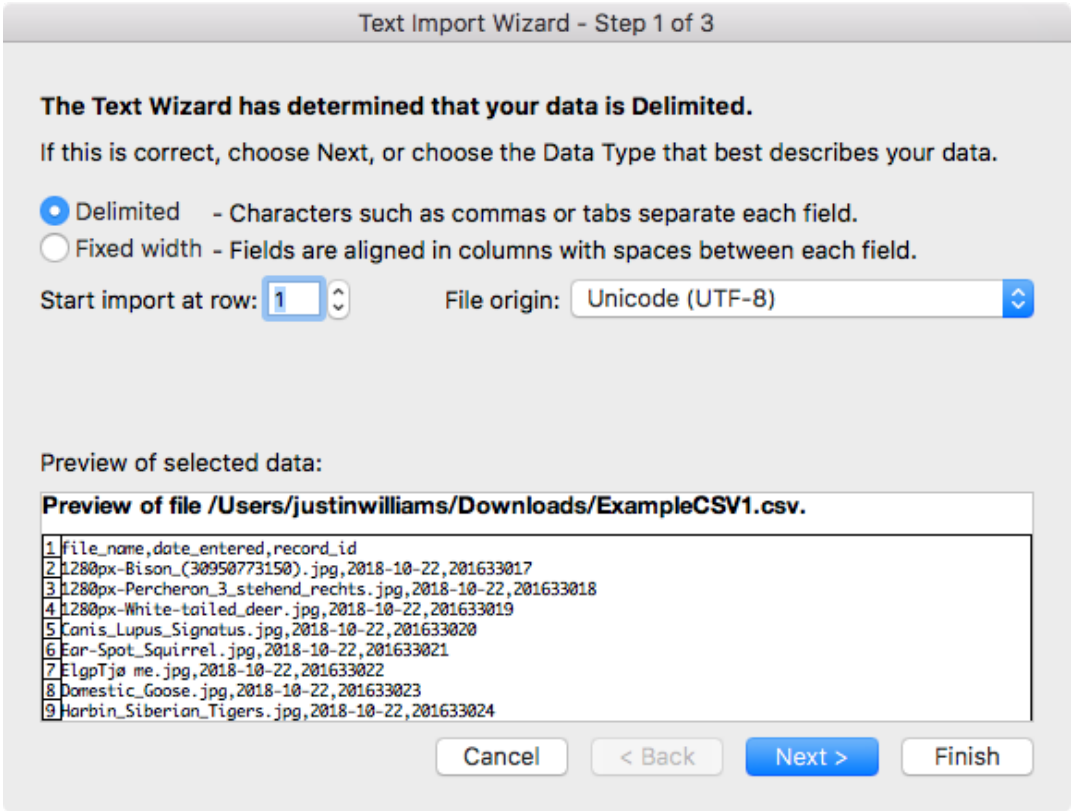
1. Create a new Workbook: File > New Workbook



2. Import file: Data Tab > From Text



3. Choose File
4. **Import Text Wizard: Step 1 of 3**



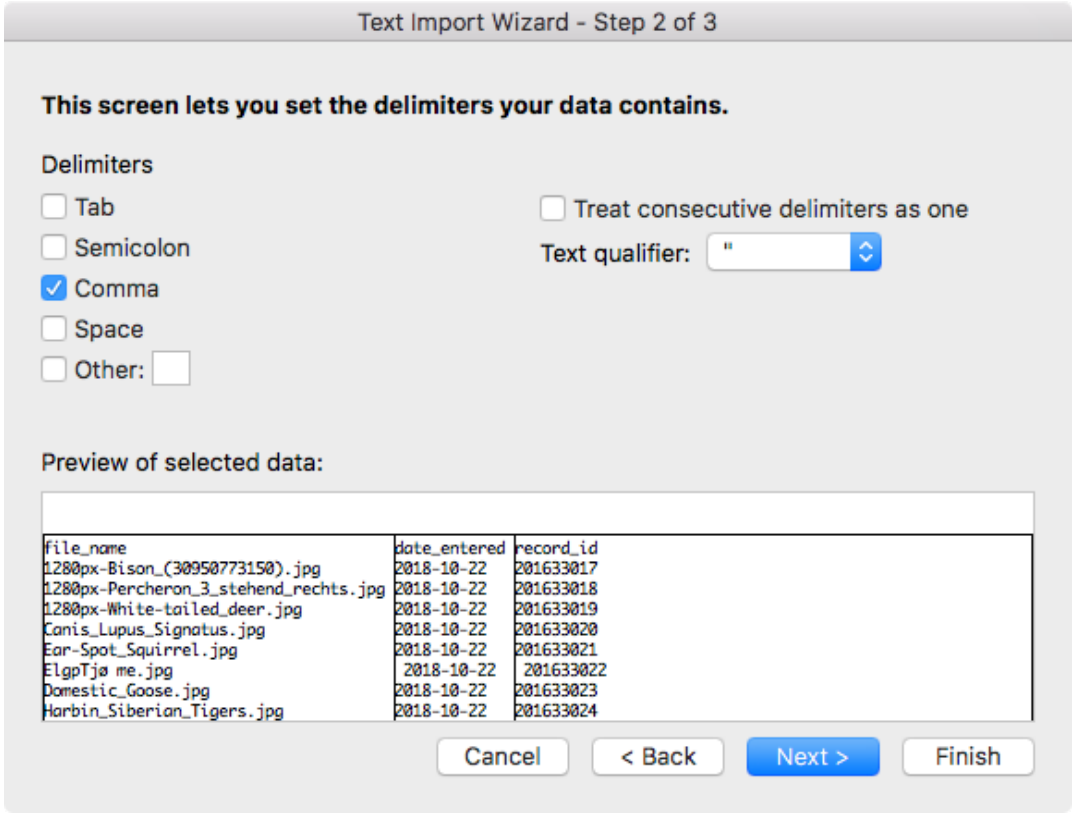
   a. Choose: "Delimited"
   b. Start Import at row: "1"

c. Choose: "File Origin: Unicode UTF-8"

   a. Other versions may have a slightly different label, use the one with 'UTF-8' in it.
   b. **Note:** This is the correct setting for files that are assured to be in UTF-8, such as files generated by MediaBeacon. Other encodings require this setting to match the file's encoding.

d. Click "Next >"

5. **Import Text Wizard: Step 2 of 3**

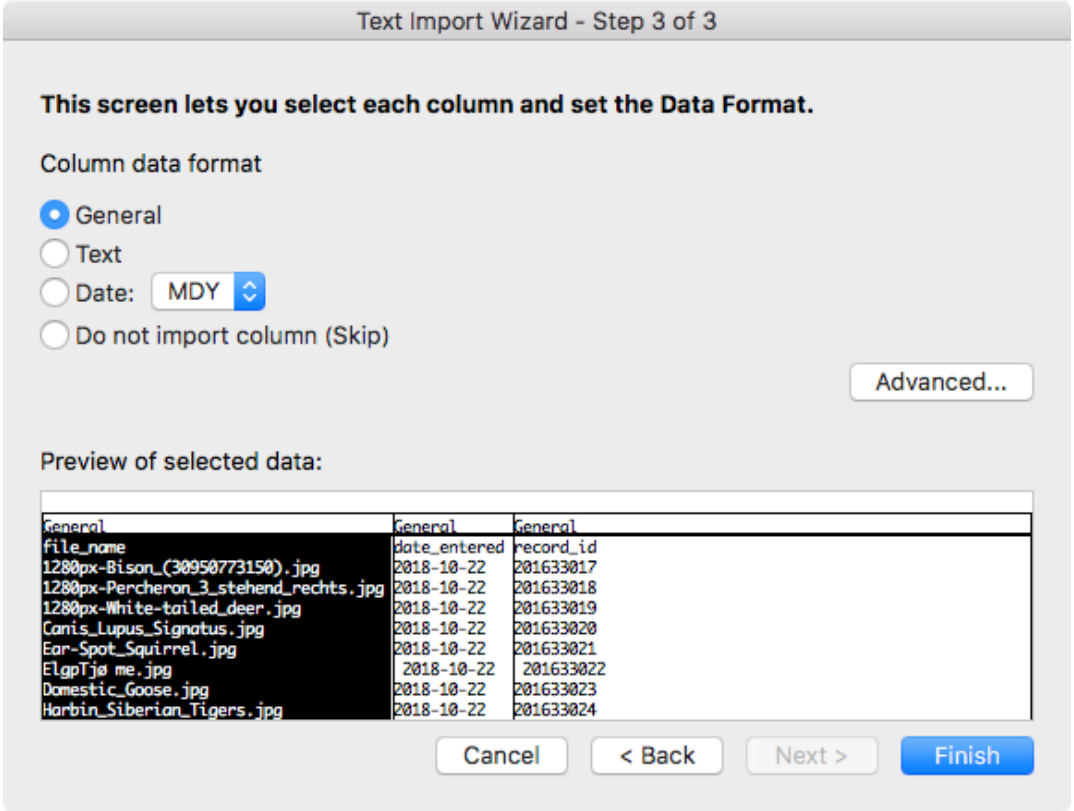


   a. Delimiters, only: "Comma"

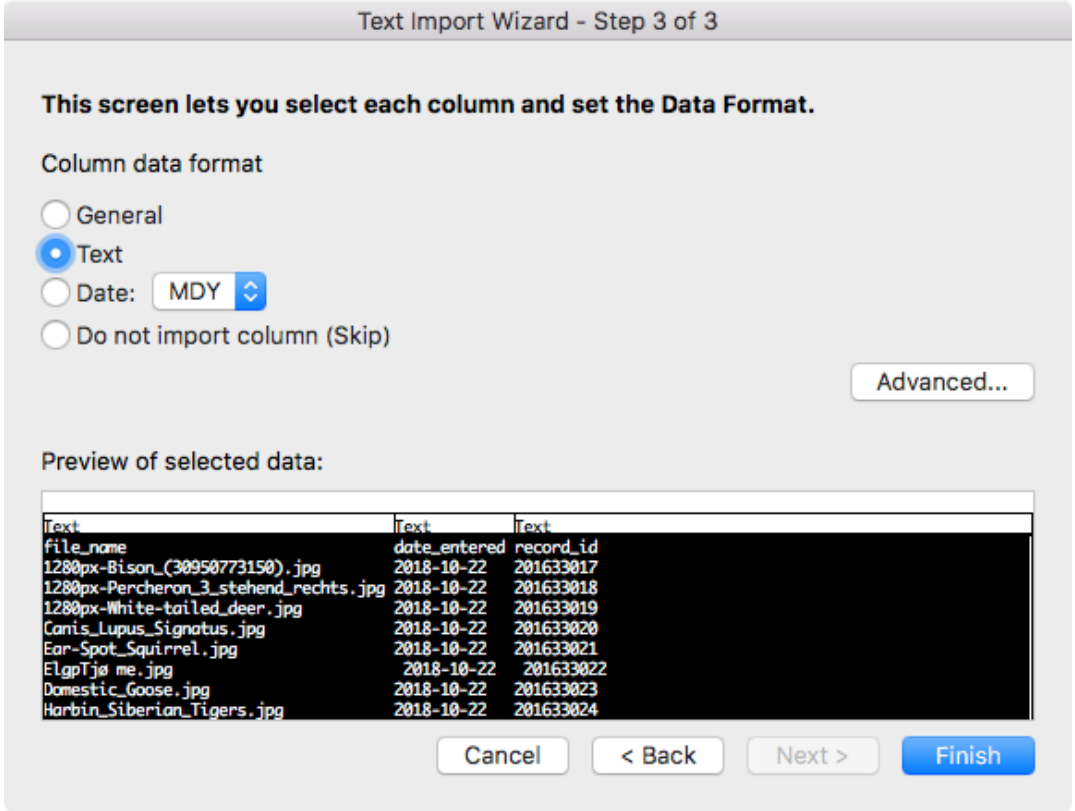
      a. If file is in tab delimited format, use the Tab Setting

   b. "Consecutive Delimiters as one": Disabled
   c. Text Qualifier to: " (double quote, this is the default)
   d. Click "Next >"

6. **Import Text Wizard: Step 2 of 3**

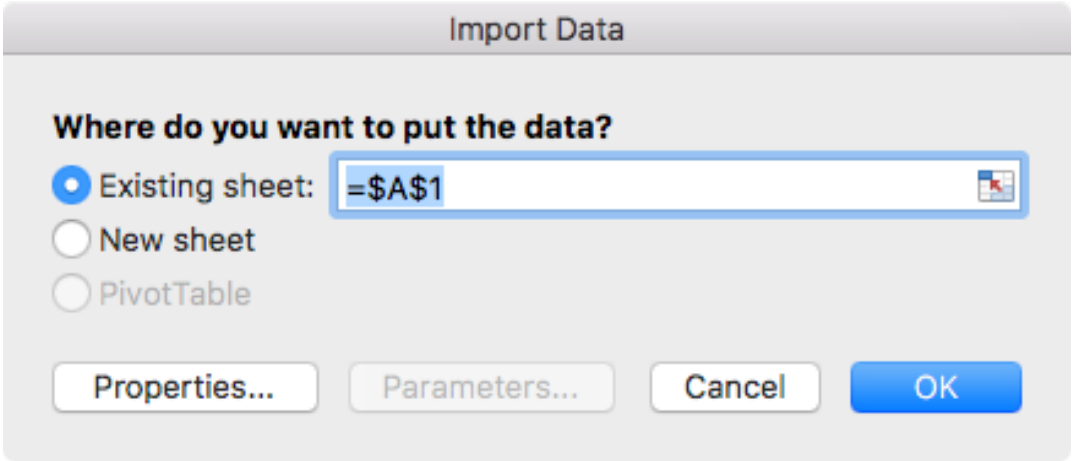


a. This screen shows a preview of the import, and the columns will all be marked as "General". This setting leads to Date values getting altered.
b. This step requires selecting the headers (not the cells) in the Data Preview, and setting them all to "Text"
    a. Easiest method is to:
    b. Click the leftmost header. The area below it will select, but be careful, this is NOT the same as selecting the area itself, you must click the header which does not display a highlight.
    c. Drag the horizontal scrollbar (if present) all the way to the right and SHIFT-click the rightmost header
c. Click "Text" under Column Data Format.
d. Ensure that EVERY column lists "Text" in the header.



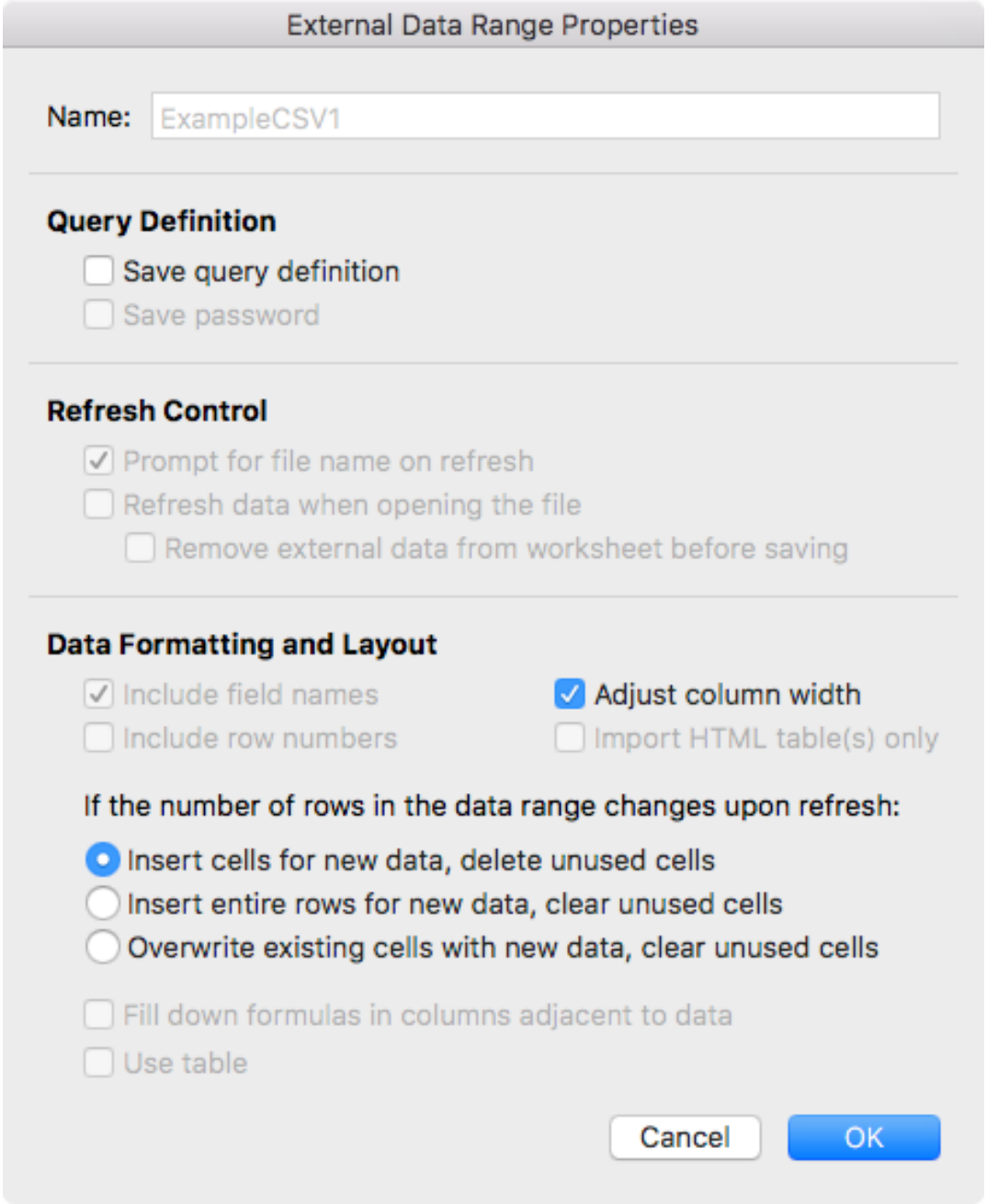
   e. Click Finish

7. **Import Data Dialog**



   a. Click Properties...

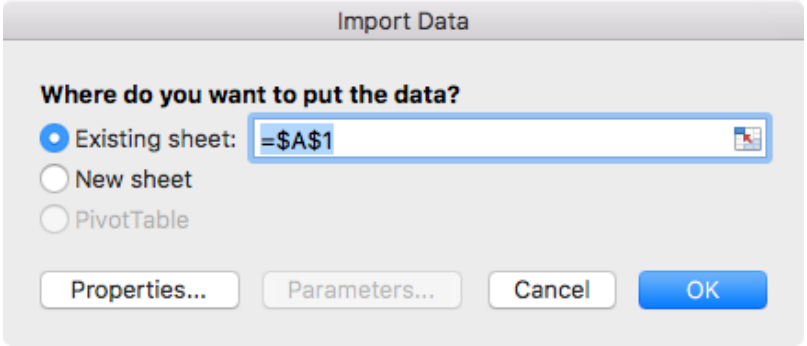
8. **External Data Range Properties Dialog**



   a. Turn OFF Save query definition...
   b. Click "OK"

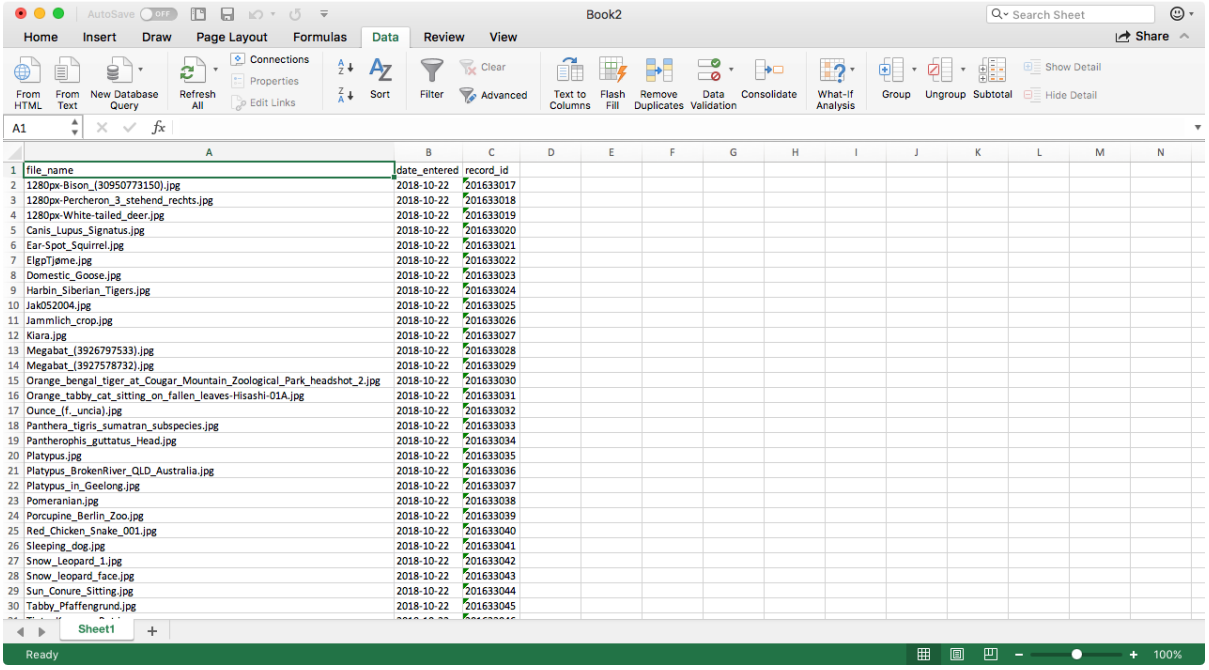
9. Import Data Dialog

   a. Existing Sheet: "=Sheet1!A1"



b. Click "OK"

c. Data from CSV is now imported.



	A	B	C
1	file_name	date_entered	record_id
2	1280px-Bison_(30950773150).jpg	2018-10-22	201633017
3	1280px-Percheron_3_stehend_rechts.jpg	2018-10-22	201633018
4	1280px-White-tailed_deer.jpg	2018-10-22	201633019
5	Canis_Lupus_Signatus.jpg	2018-10-22	201633020
6	Ear-Spot_Squirrel.jpg	2018-10-22	201633021
7	ElgpTjøme.jpg	2018-10-22	201633022
8	Domestic_Goose.jpg	2018-10-22	201633023
9	Harbin_Siberian_Tigers.jpg	2018-10-22	201633024
10	Jak052004.jpg	2018-10-22	201633025
11	Jammlich_crop.jpg	2018-10-22	201633026
12	Kiara.jpg	2018-10-22	201633027
13	Megabat_(3926797533).jpg	2018-10-22	201633028
14	Megabat_(3927578732).jpg	2018-10-22	201633029
15	Orange_bengal_tiger_at_Cougar_Mountain_Zoological_Park_headshot_2.jpg	2018-10-22	201633030
16	Orange_tabby_cat_sitting_on_fallen_leaves-Hisashi-01A.jpg	2018-10-22	201633031
17	Ounce_(f._uncia).jpg	2018-10-22	201633032
18	Panthera_tigris_sumatran_subspecies.jpg	2018-10-22	201633033
19	Pantherophis_guttatus_Head.jpg	2018-10-22	201633034
20	Platypus.jpg	2018-10-22	201633035
21	Platypus_BrokenRiver_QLD_Australia.jpg	2018-10-22	201633036
22	Platypus_in_Geelong.jpg	2018-10-22	201633037
23	Pomeranian.jpg	2018-10-22	201633038
24	Porcupine_Berlin_Zoo.jpg	2018-10-22	201633039
25	Red_Chicken_Snake_001.jpg	2018-10-22	201633040
26	Sleeping_dog.jpg	2018-10-22	201633041
27	Snow_Leopard_1.jpg	2018-10-22	201633042
28	Snow_leopard_face.jpg	2018-10-22	201633043
29	Sun_Conure_Sitting.jpg	2018-10-22	201633044
30	Tabby_Pfaffengrund.jpg	2018-10-22	201633045

10. Save as an Excel file.

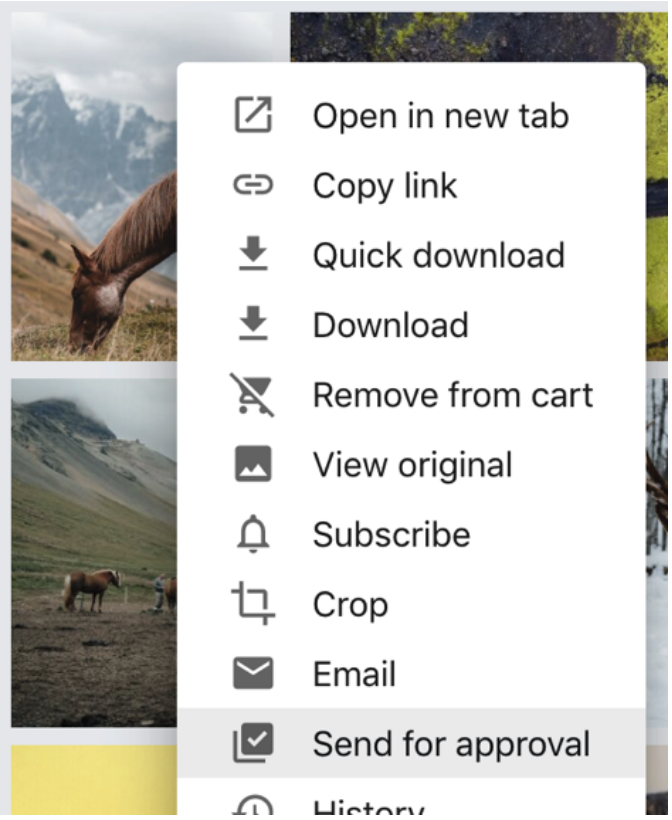
3.16. Approvals

The Approvals feature enables single-stage#approval cycles#withinMediaBeacon,#using#the#Vproof Viewer. Users are able to submit assets for approval, specifying the approvers and a due date. Assets are#presented#to approvers#in the#Approval#Viewer, where they#provide feedback,#reject, or#approve#those submissions.

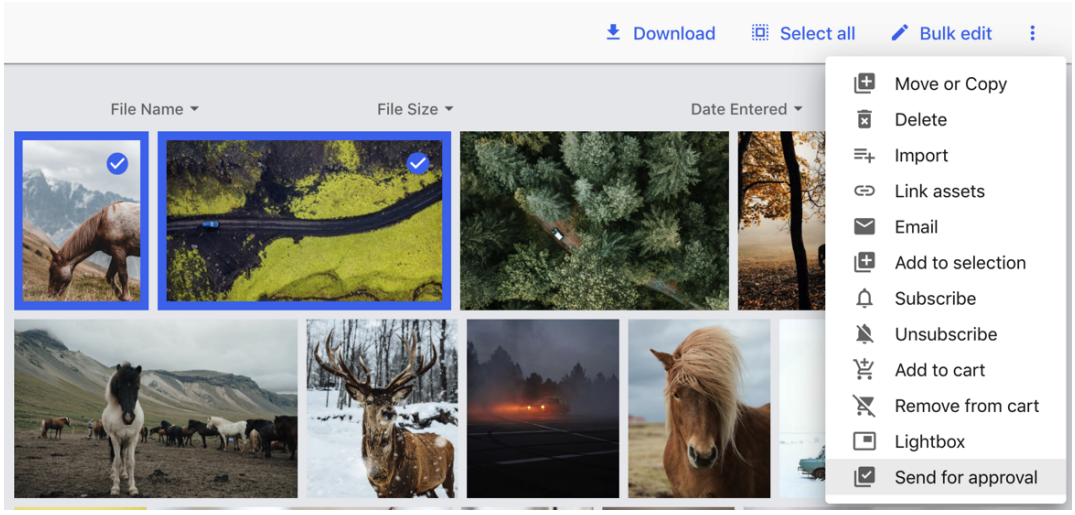
The Approvals system is an add-on product for MediaBeacon, and may not be available in all instances.

3.16.1. Approval Process

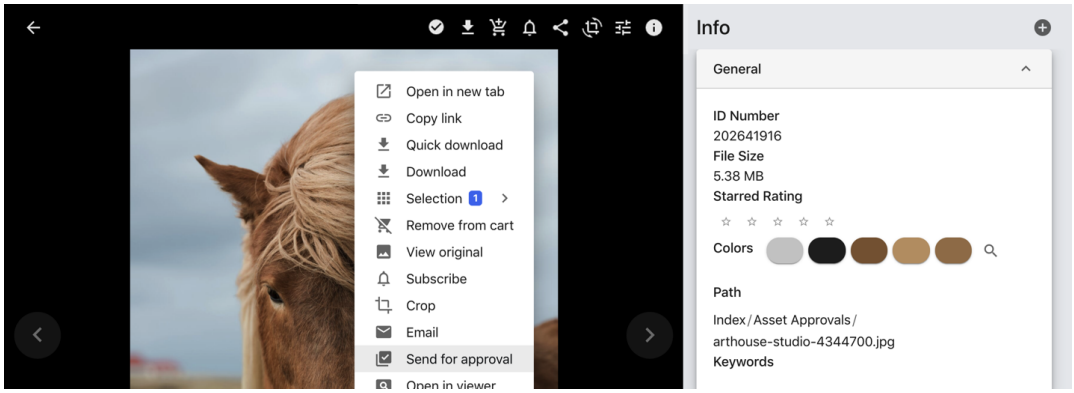
1. The requesting user (requestor) selects assets to be approved
2. The requestor chooses the "Send for Approval" command: This may be done in a number of places in the Web UI:
   1. In an assets' contextual menu



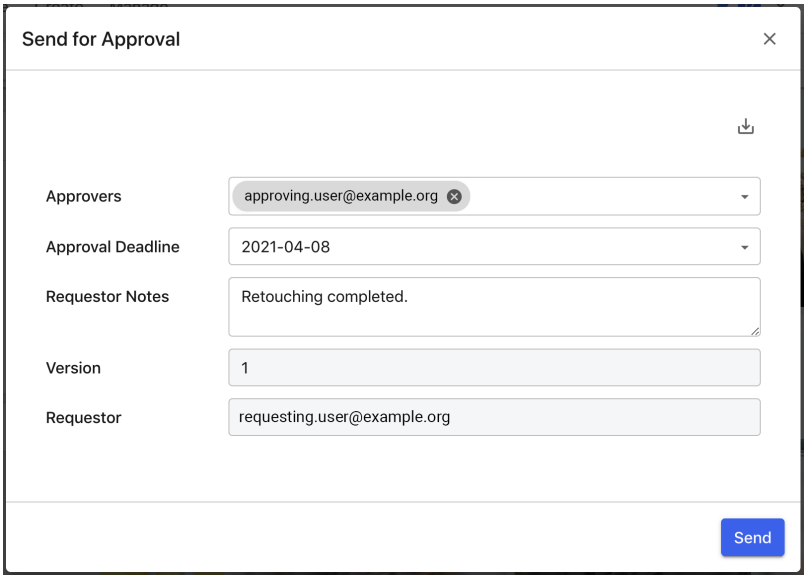
   2. In the Selection Bar menu



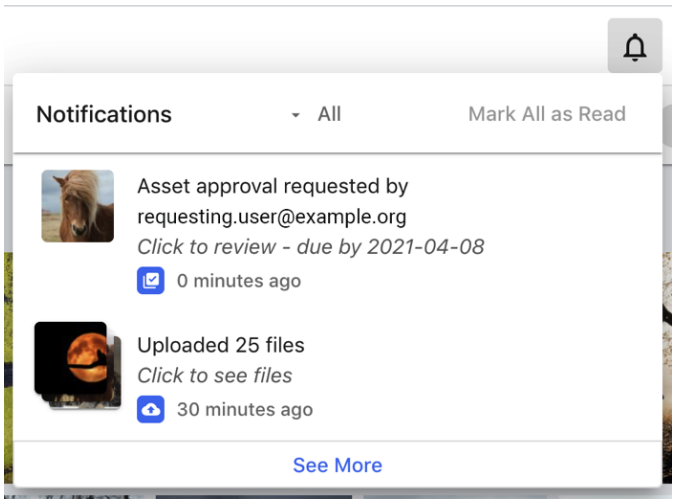
3. In the asset view contextual menu



3. The "Send for Approval" dialog is displayed prompting the requestor to fill out:
   1. The username of the approver (Required Value)
   2. The approval deadline date (Required Value)
   3. Requestor Notes, optional (Required Value)

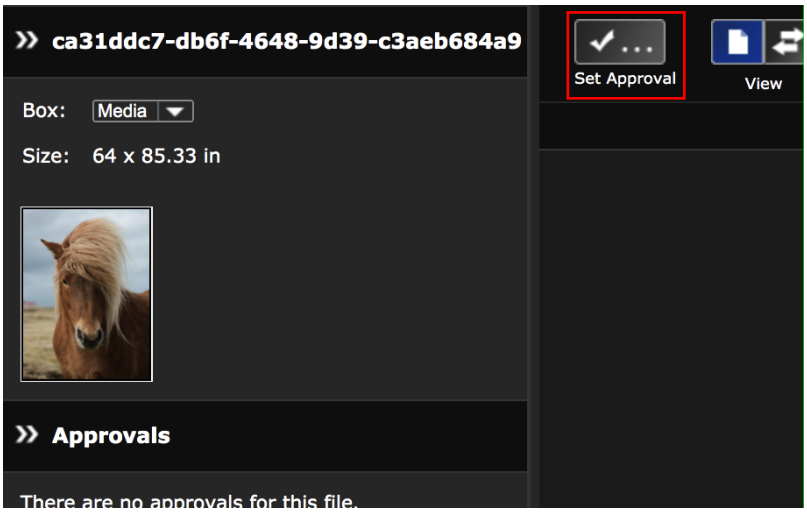


4. The requestor clicks “Done” to submit the request.
5. The approval status is automatically set to “Waiting".
6. The approver (user assigned as approver above) receives a menu notification for the approval request.



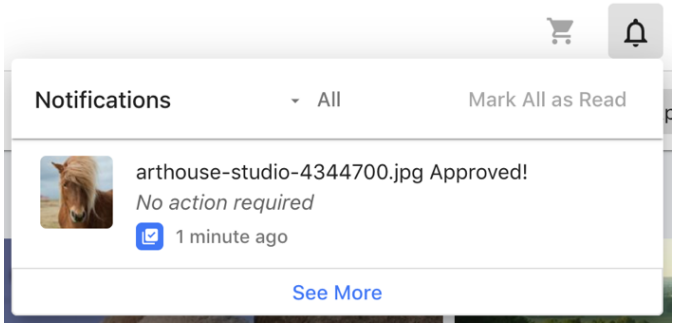
7. The approver clicks the notification, and the Vproof Approval Viewer loads in a separate browser tab.

8. Using the Approval Viewer, the approver will add notes and markup as appropriate and then sets the approval to Approve or Reject using the Set Approval button.



9. The Approver sets the Approval of the asset in the “Set Approval State” dialog, and clicks done. After this step, the Vproof Viewer browser tab may be closed.

10. The Requestor receives an Approval notification in the Notification Menu.



3.16.2. Additional Functionality & Multiple Approvers

- Whenever an Approval system notification is sent, an email is sent as well.
- If an Asset remains in the "Waiting" status, Deadline 1 day reminder email and notification.
- Any asset that had been processed with the approval system retains information used and notes made in the Vproof Viewer. This can be accessed via the "Open in Viewer" command which appears in the:
  - Assets' contextual menu
  - Selection Bar menu
  - Asset View contextual menu
  - An icon button in the Asset View

- When multiple assets are selected and the "Send for Approval" command is used, the "Send for Approval" field will not be displayed, as not all assets may be on the same version number. However, assets will increment individually, as normal.
- Send for Approval Form: This is the Form used in the "Send for Approval" dialog, it may also be used to initiate an Approval when viewed in the Asset View by entering required information.

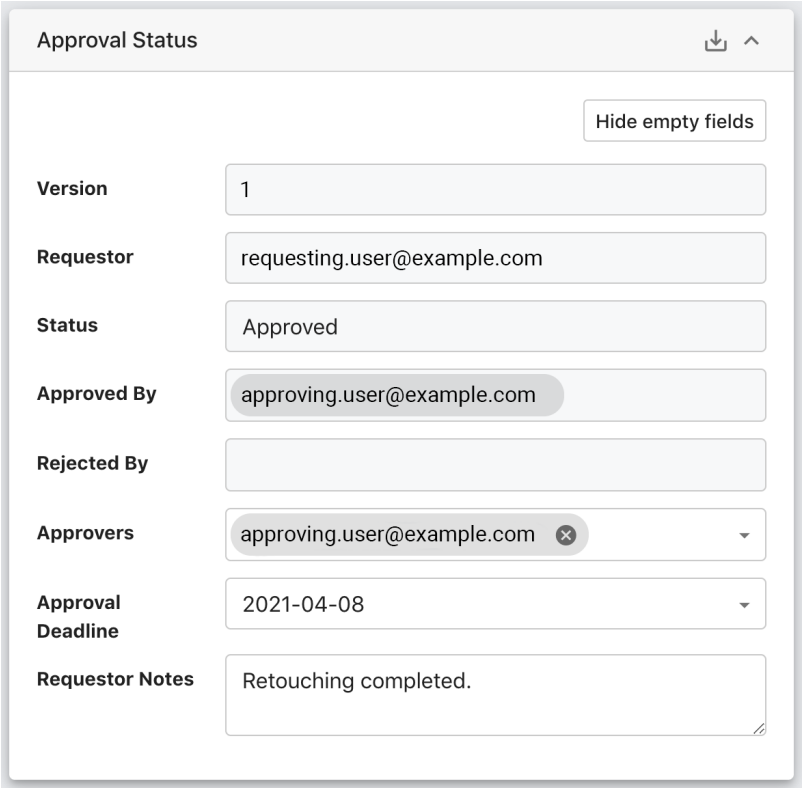
Multiple Approvers

When multiple approvers are specified, the Status of an approved asset will be slightly different.

- All approvers must Set Approval to "Approved" to set that asset's Approval Status to "Approved." Until this is done, the Approval Status value will be "Waiting."
- Only one approver needs to Set Approval to "Rejected" for that asset and end the current approval cycle.

3.16.3. Approval Status Form

This form displays Approval information.



- **Version:** Displays the number of approval cycles the asset has undergone. Note that all other fields on this form will show values from the most recent approval cycle only. This field is not user-editable.
- **Requestor:** Displays the requesting user. This field is not user-editable.
- **Status:** Displays the current status as set in the Vproof Viewer. This field is not user-editable.
- **Approved By:** Displays the user who approved the asset in the Vproof Viewer. This field will be left blank if an asset is rejected. This field is not user-editable.

- **Rejected By:** Displays the user who rejected the asset in the Vproof Viewer. This field will be left blank if an asset is approved. This field is not user-editable.
- **Approval Deadline:** Displays the approval deadline as designated by the requestor on the "Send for Approval" dialog.
- **Requestor Notes:** Displays the requestor notes as designated by the requestor on the "Send for Approval" dialog.

4. MediaBeaconConnectors

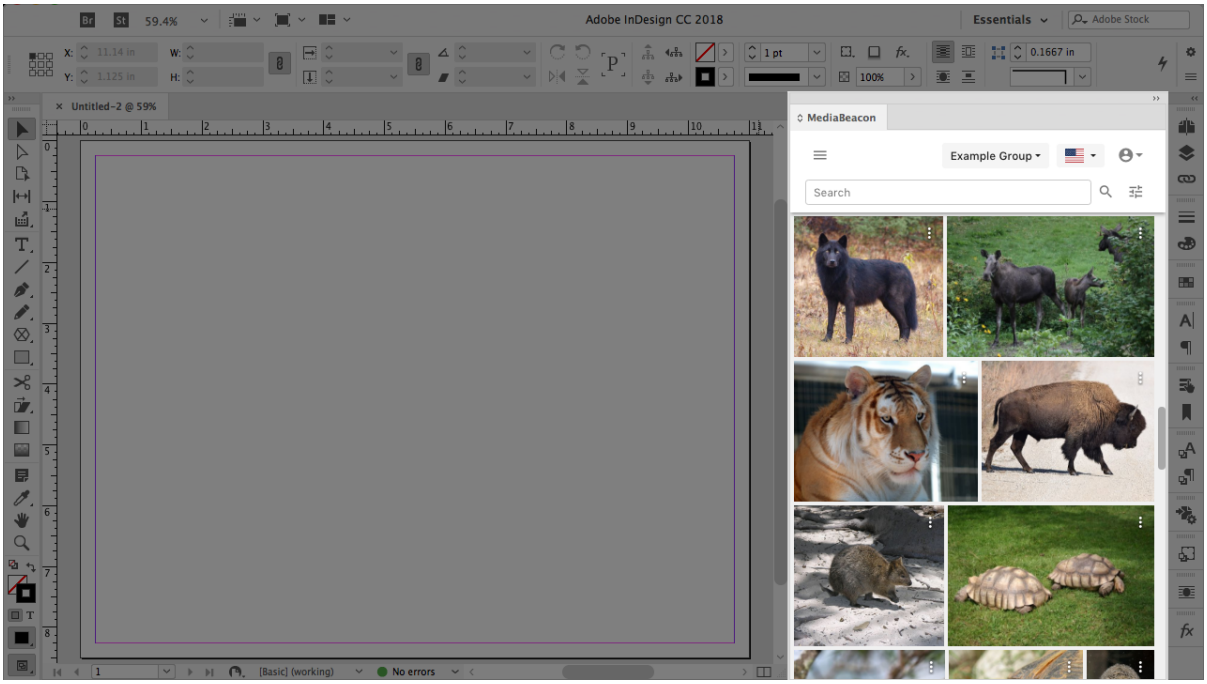
Learn how MediaBeacon Connectors extend the capability of content creation software.

4.1. Adobe® Connector

Integrate MediaBeacon into Adobe® products.

- The Adobe Connector now supports check in check out
  - Right click the desired asset.
  - Select the action to be performed.
- The Adobe Connector now allows the user to specify the directory location for new asset uploads.
- The Adobe Connector Tasks now have a search bar to filter on tasks, and thumbnails are shown for task documents.
- In the Tasks section of Adobe connector, the user can find the files quickly by the option to search them automatically by the image browser.

The Adobe® Connector is an add-on product that enablesMediaBeacon functionality within some Adobe® products. The Connector requires Creative Cloud 2018 or newer, and works with InDesign®, Photoshop®, and Illustrator®.



Main Capabilities

The Connector allows users to:

1. Search for assets stored in MediaBeacon

2. Place images into layout documents directly from MediaBeacon without a separate download step.
3. Place FPO images (low-res temporary images), and all FPO links with the original images in one step.
4. Edit assets without a separate download step.
5. Automatically upload placed images when layout document is uploaded intoMediaBeacon.
6. Upload new files or versions of changed files to MediaBeacon from within an Adobe® application.
7. Create and automatically upload PDF proofs to MediaBeacon.
8. Automatically replace a local file with a more-recently updated one, stored in MediaBeacon.

Limitations

- Not all Adobe® applications will have the same feature set with the Connector.
- Fonts are not managed by the Connector.
- Placed .csv files (used for Data Merge in InDesign®) are not managed by the Connector. CSV files are also not shown in the Connector asset browser.
- Folder structure of placed images is not preserved when uploaded to MediaBeacon, instead they are put in

```
<cachefolder>/<aclfolder>/uploads/<user>/<datestamp>/links/
```

Terminology

For clarification, several terms used in this article will be defined here:

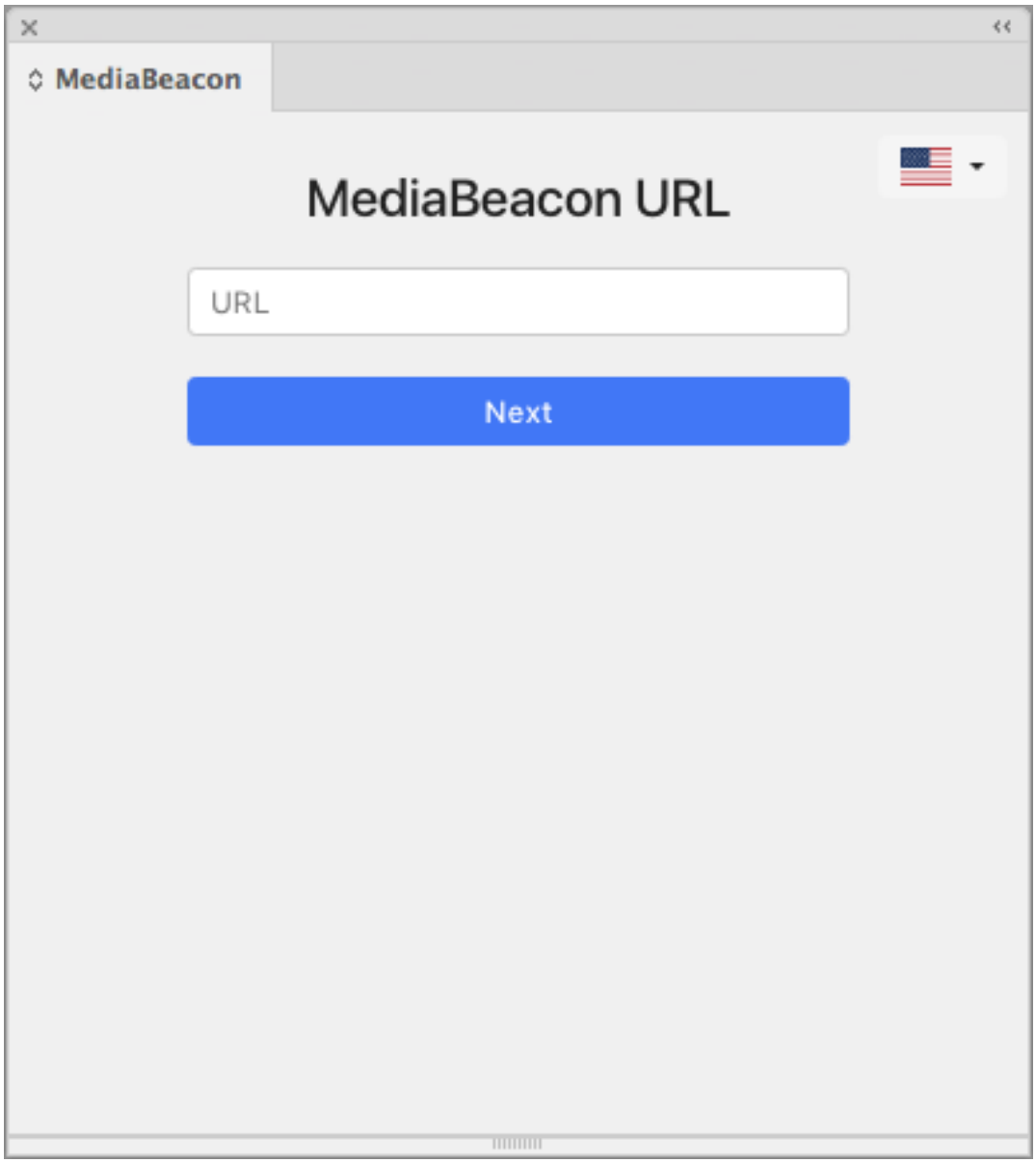
- **Assets**: Files stored in MediaBeacon.
- **Layout document**: A generic term for either an InDesign® or Illustrator® document, especially one that contains placed images.
- **Placed images**: Often referred to as "links", these are files that are referenced or "placed" in a layout document. The full data of these images are not copied into the layout document, but are referenced when the layout document is printed or used to generate a PDF. Layout documents will include a low-resolution preview of the image used for on-screen placement, but this is typically not suitable for print-resolution output.
- **Local cache**: This refers to a folder on an end user's computer that the Connector uses as a cache for files synced with MediaBeacon. This area contains layout documents, images, and other files uploaded or downloaded via the Connector.

Connector Basics

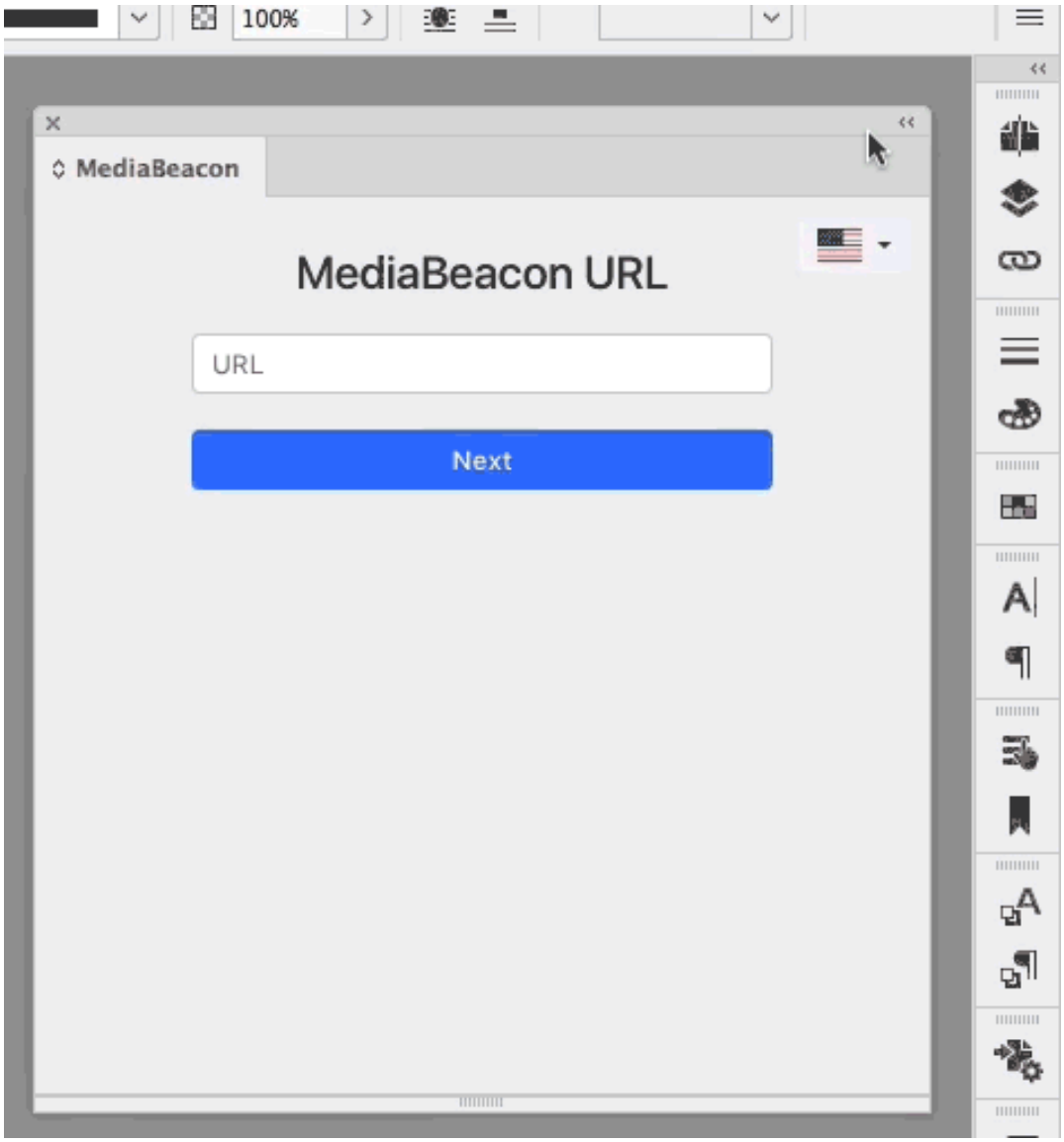
Managing the Connector Panel

The Connector acts as another panel in the Adobe® application interface. Once installed it may be added to the current workspace with the following steps:

1. In an Adobe® application, from the menubar, choose Window > Extensions > MediaBeacon.
   a. On macOS, this can also be done by choosing "Help" and entering "MediaBeacon"
2. The Connector window will display as a free-floating panel.



3. To "dock" the panel, drag the panel tab to the edge of a window docking area, such as the right hand toolbar. A blue edge will be highlighted, indicating it will be inserted horizontally adjacent to the current menubar.

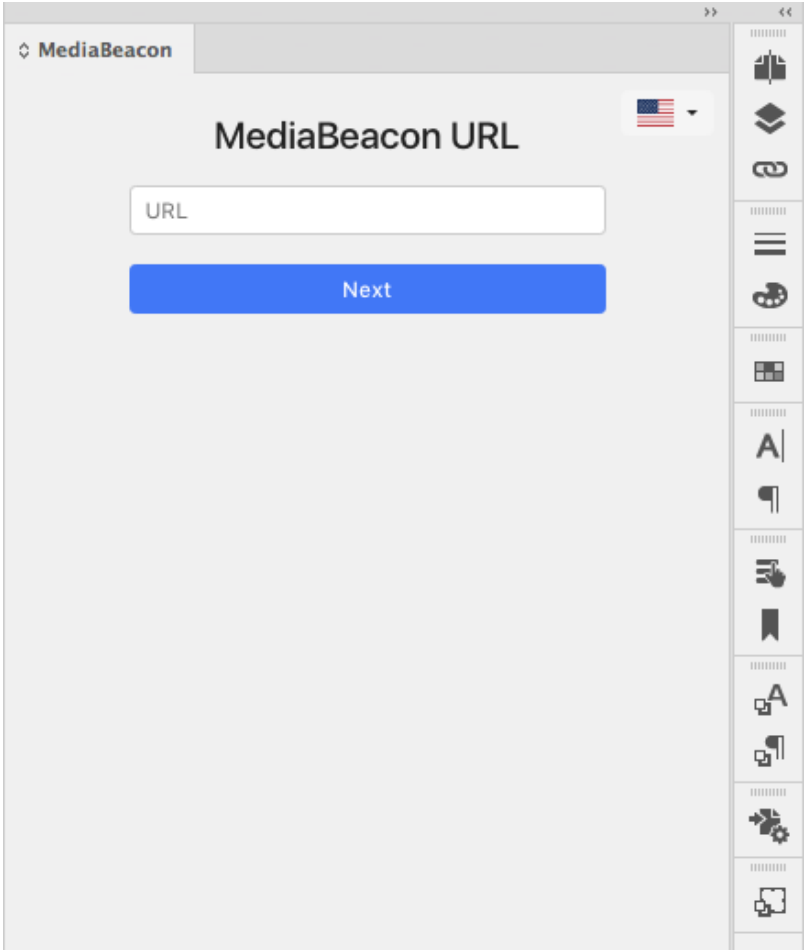


Note: Because the Adobe® workspace UI is very flexible, the panel may be docked anywhere any other panel may be, see the "Manage windows and panels" section of the given Adobe® application's User Guide.

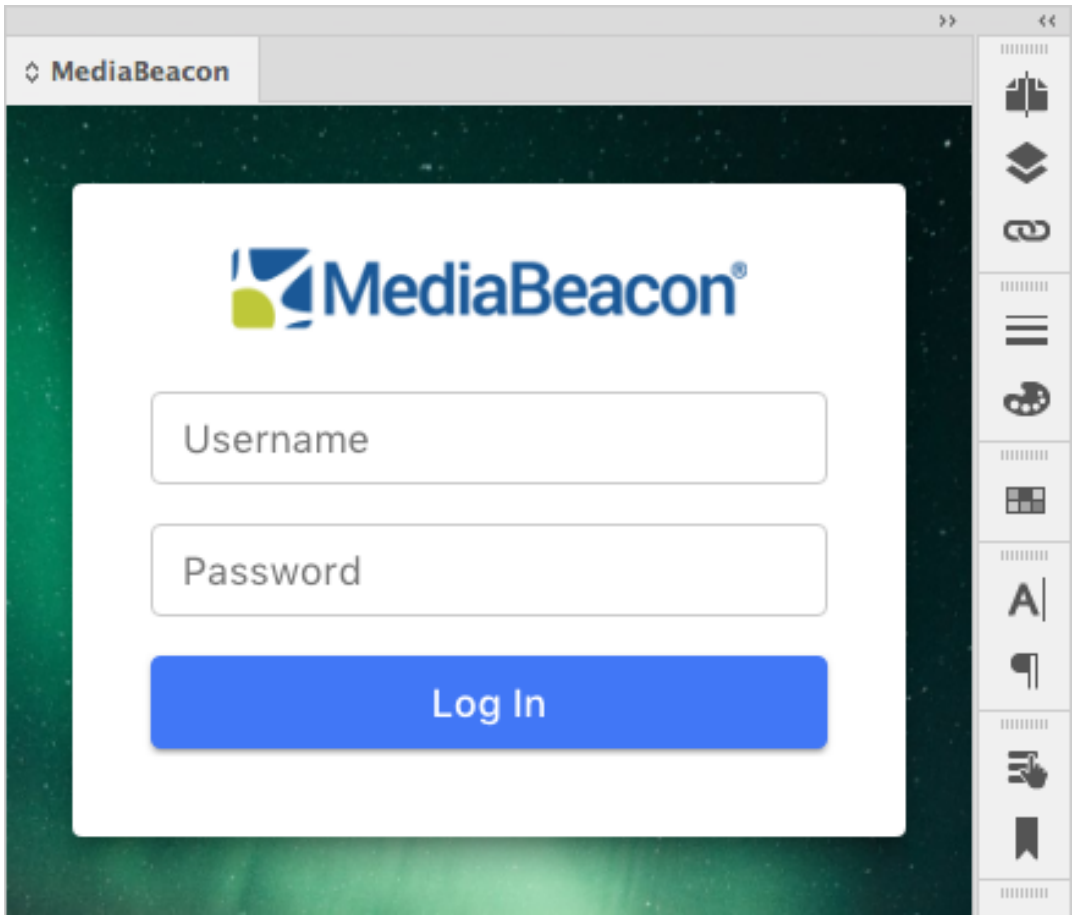
- InDesign: *Manage Windows and Panels*
- Illustrator: *Customizing Workspace*e
- Photoshop: *Manage Windows and Panels*

Logging into MediaBeacon via the Connector

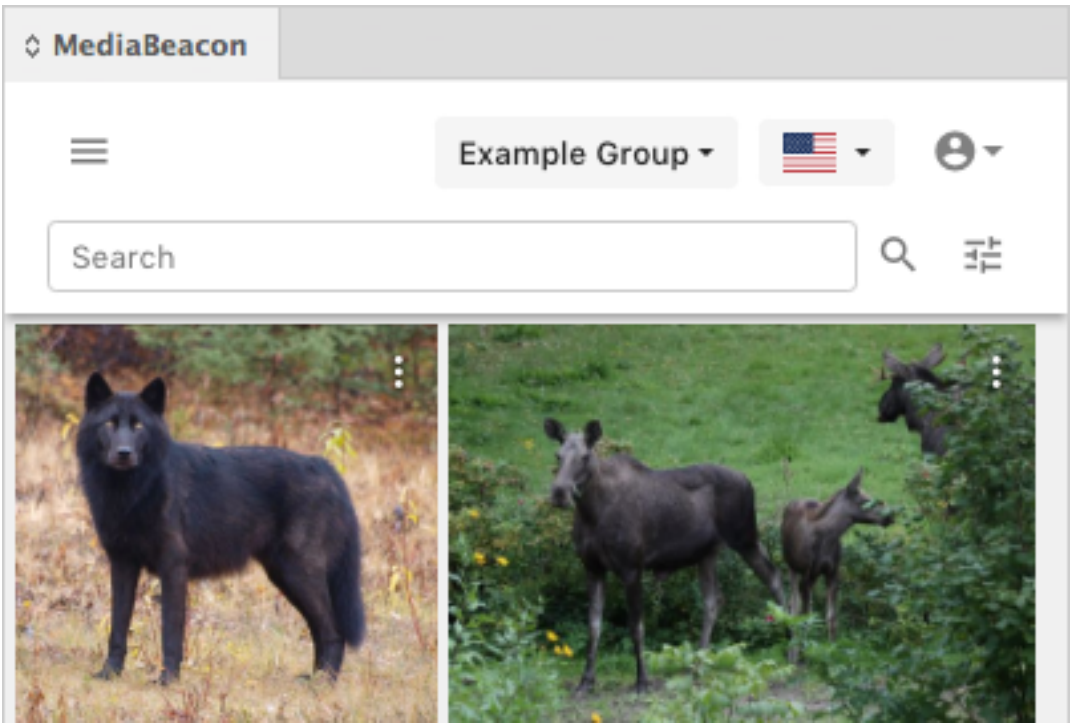
- The Connector allows the user to enter the URL for a MediaBeacon server when displaying the "MediaBeacon URL" screen.



- The URL entered must include http:// or https://
  - The easiest method is to copy the URL from a browser window while logged into MediaBeacon.



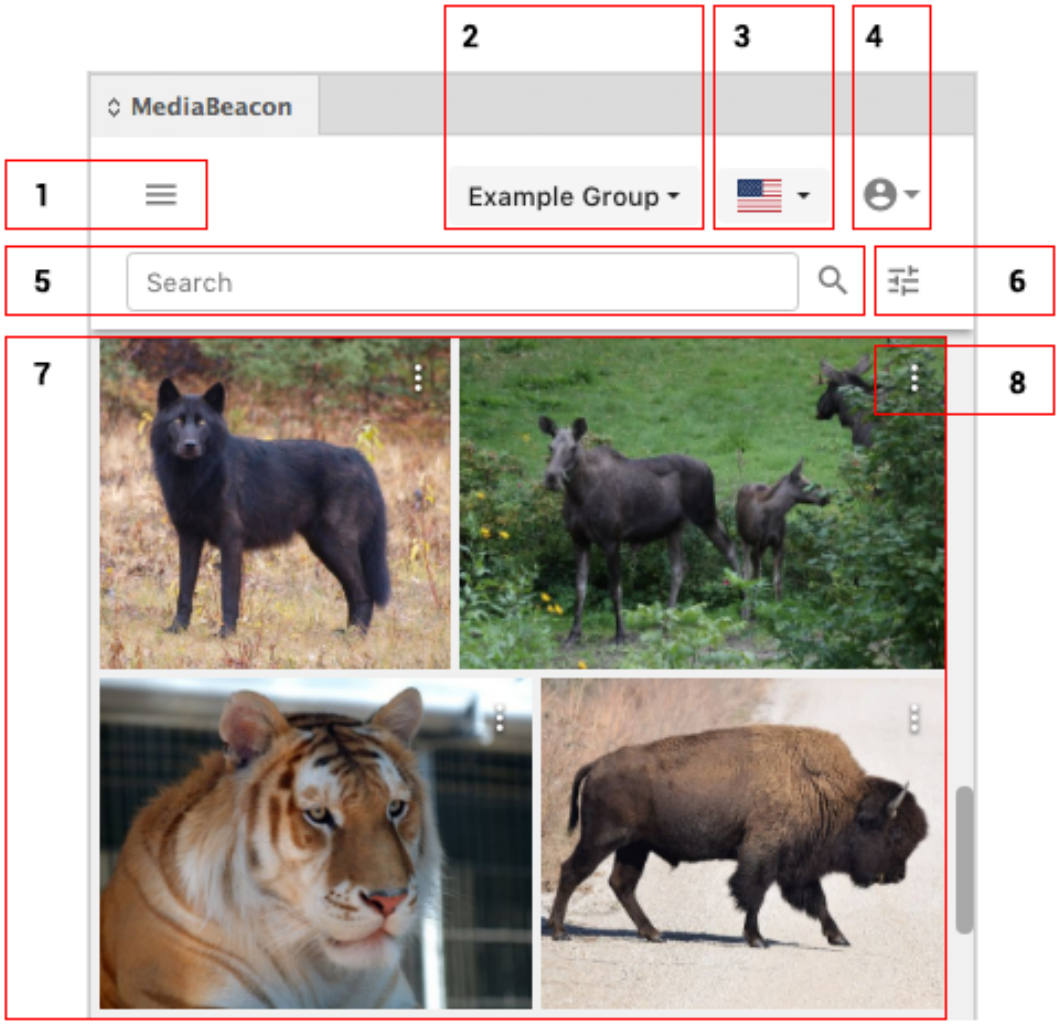
- The user will enter username and password, and when authenticated, the plug in panel will be displayed in "logged in" mode.



Logging out of MediaBeacon via the Connector

1. Select "Logout" from the User Menu.
2. The Connector's panel displays the "MediaBeacon URL" page.

Connector User Interface


2
3
4
MediaBeacon
1
Example Group
5
Search
6
7
8

1. **Directory Panel Toggle**: This button opens the folder browser, showing the folders and Saved Selections available in the current MediaBeacon ACL.

Figure 25: Toggle Button

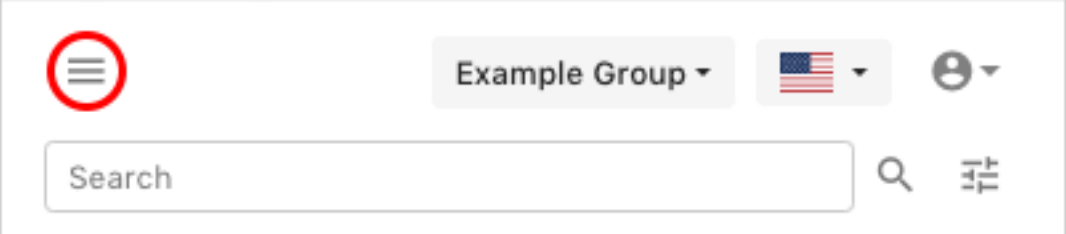
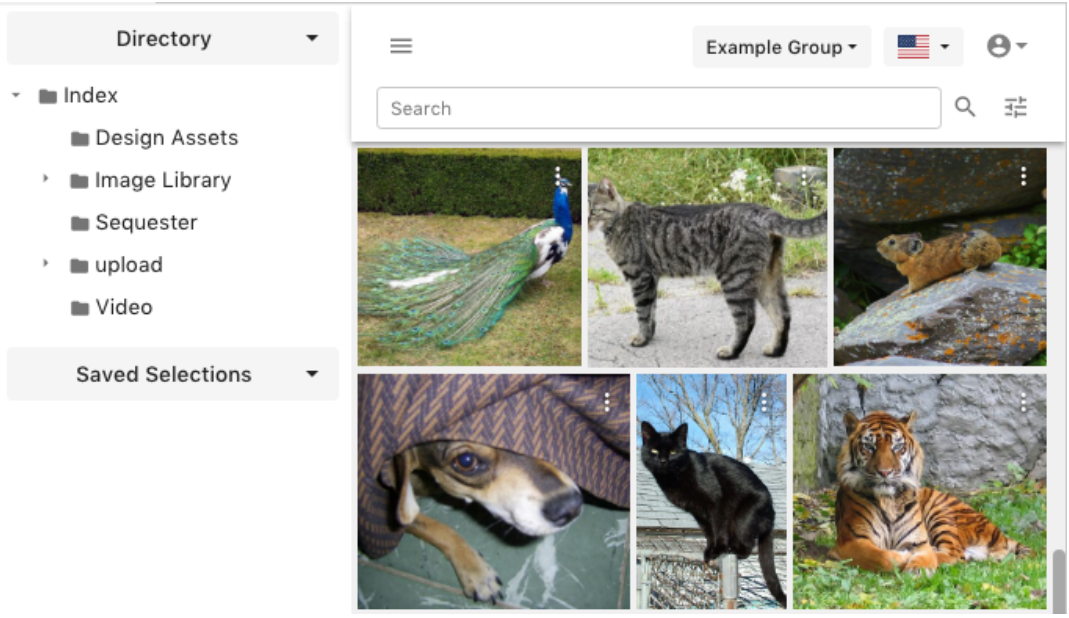
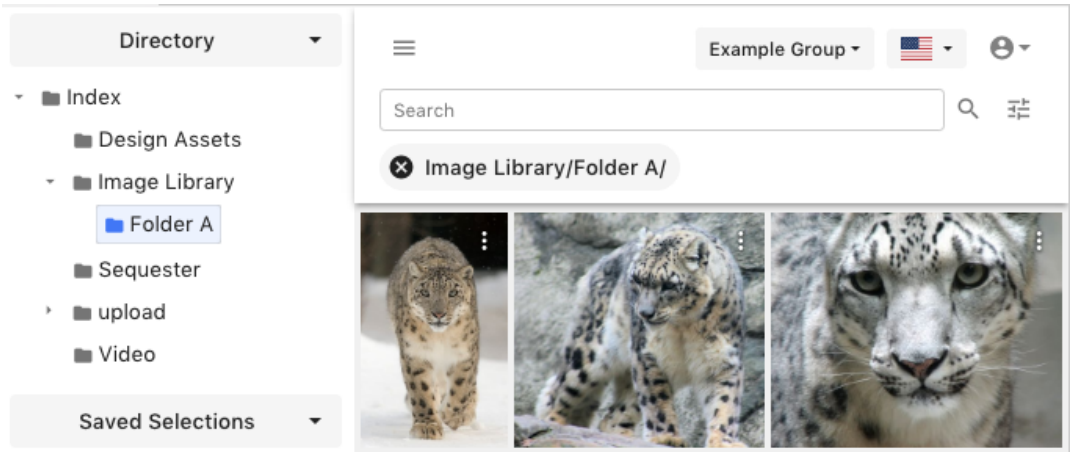


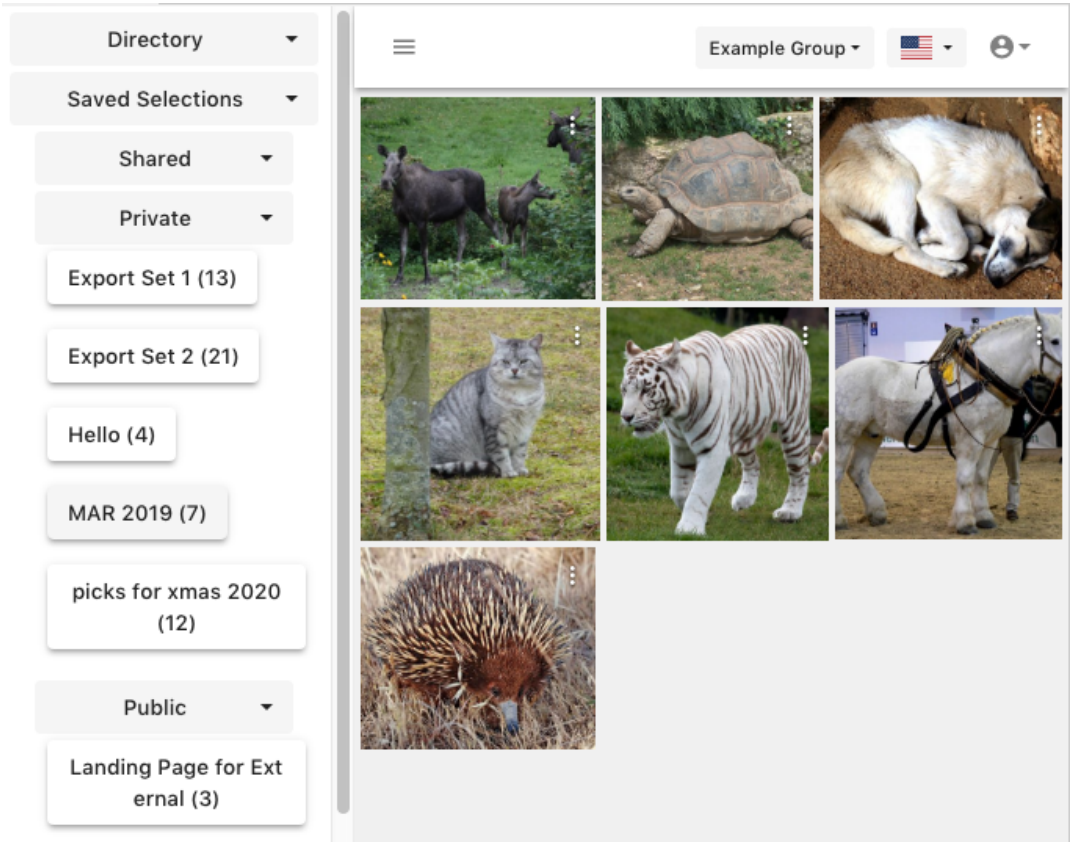
Figure 26: Directory Panel opened



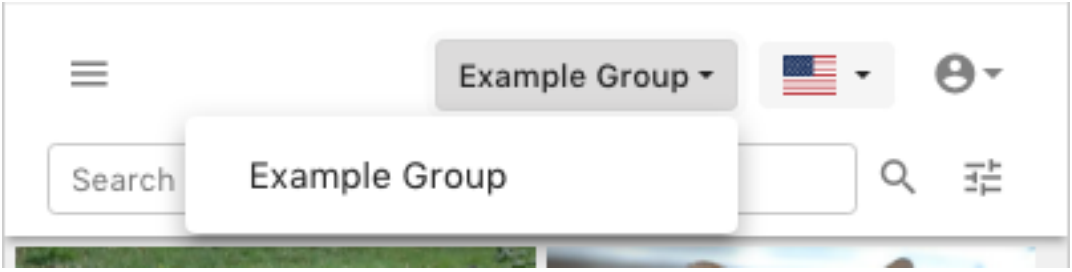
a. **Directory tab**: When spun open, this area displays the folders on the DAM to which the user has access. When a folder is selected, the asset browser will be filtered to show contained assets, and a path indicator is also displayed. Clicking the circled "X" button will clear that folder filter.



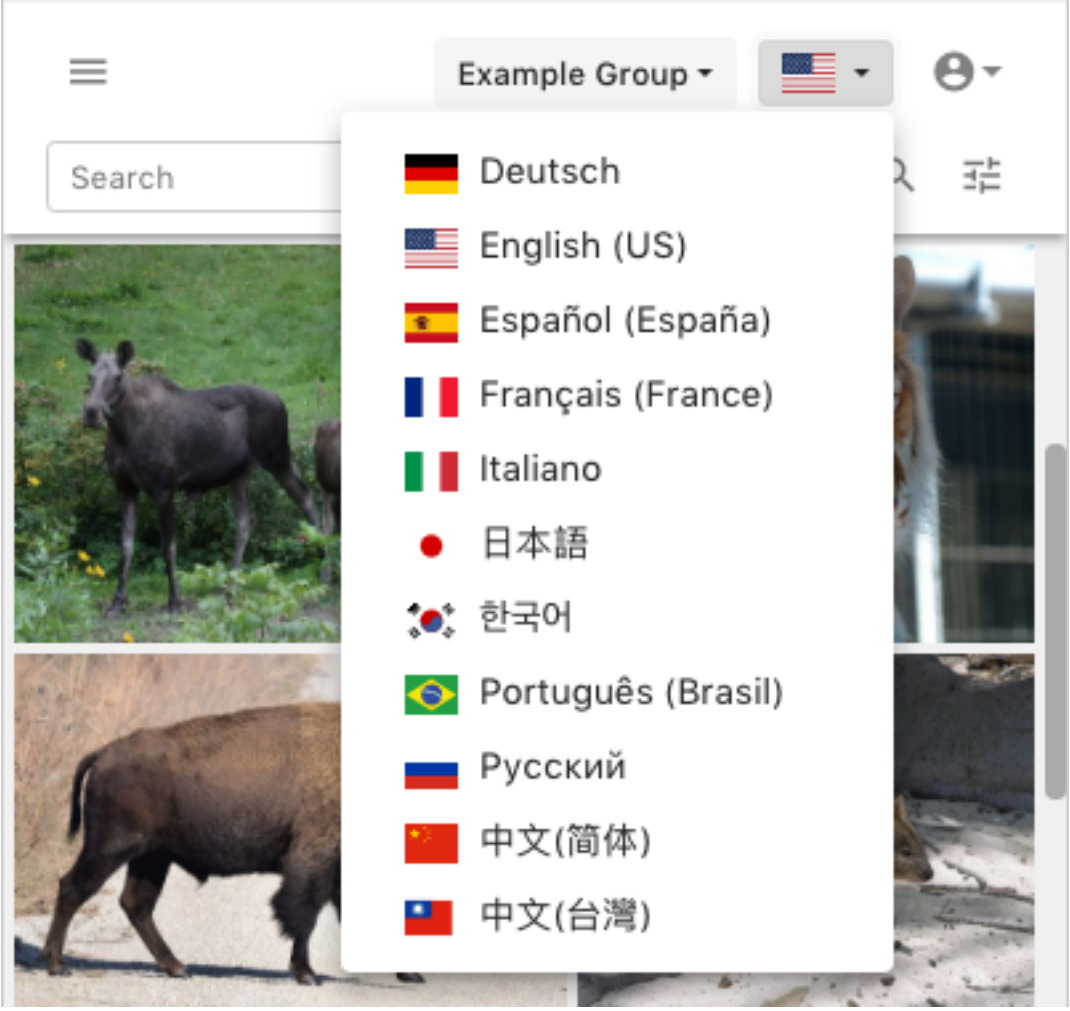
b. **Saved Selections tab**: When spun open, this display 3 further tabs of saved searches (Shared, Private and Public). When any of those categories are spun open, a list of saves searches are displayed, and upon clicking one, the asset browser filters for only the assets in that selection. Note: when a saved selection is loaded, the search bar is not shown.



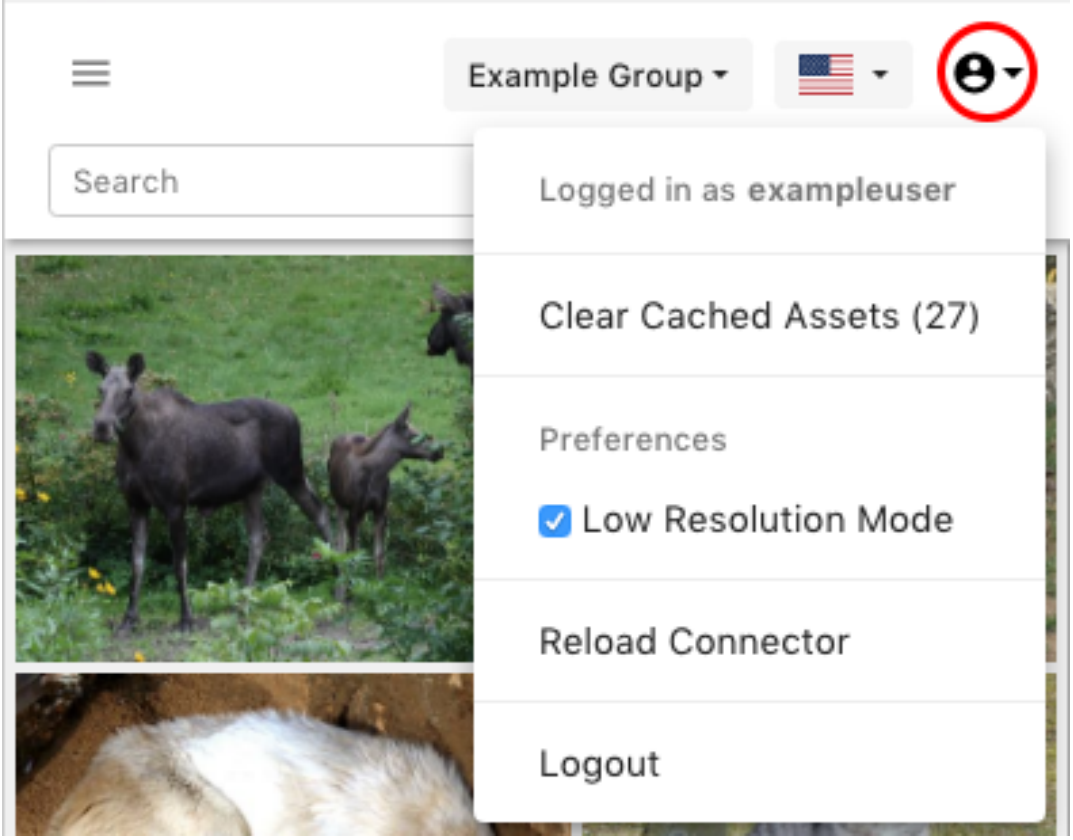
2. **ACL Menu:** Allows the user to choose an ACL to which they have access in the MediaBeacon system. This allows the user to view and use assets accessible to that ACL.



3. **Language Menu**: Changes the language of the Connector interface.


Example Group
Search
Deutsch
English (US)
Español (España)
Français (France)
Italiano
日本語
한국어
Português (Brasil)
Русский
中文(简体)
中文(台灣)

4. **User Menu:**

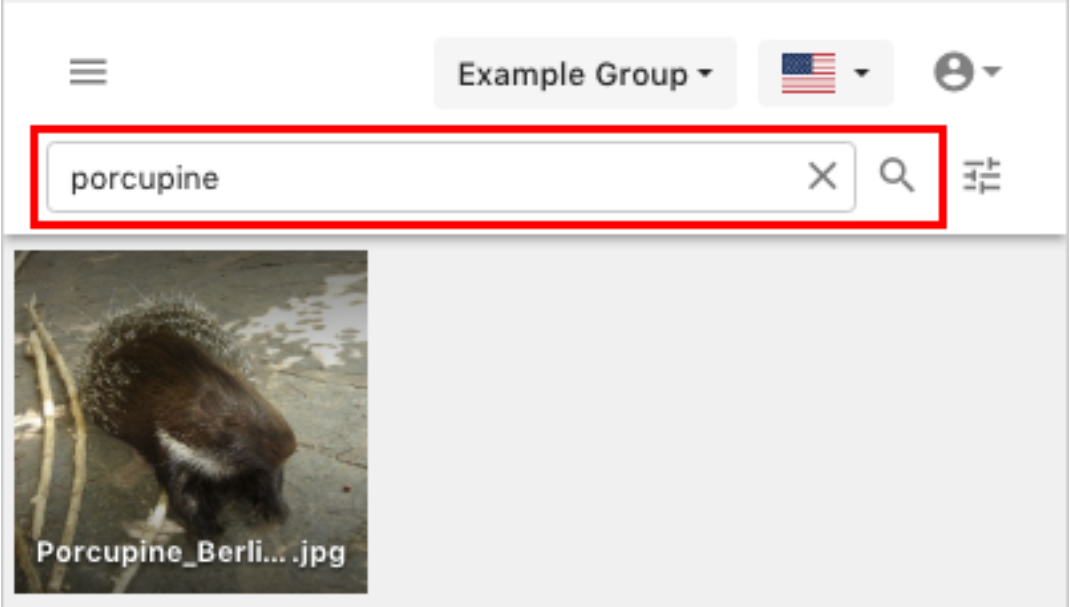


a. **Logged in as**: This row in the menu displays the current logged in user.
b. **Clear Cached Assets**: This command will display the number of files resident in the connector's local cache folder. When clicked, the connector will remove all files in this folder.

   Note: Files removed via this method are immediately deleted.

c. **Preferences: Low Resolution Mode**: This function is explained in detail below.
d. **Reload Connector**: This command will restart the connector within the current Adobe® application.
e. **Logout**: Disconnects the Connector from the logged-in user'sMediaBeacon account.

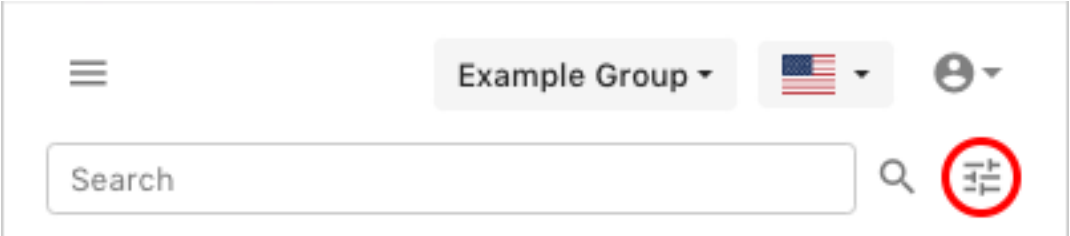
5. **Search Field**: A simplified QuickSearch field. Strings entered here search all metadata in the current ACL's assets.



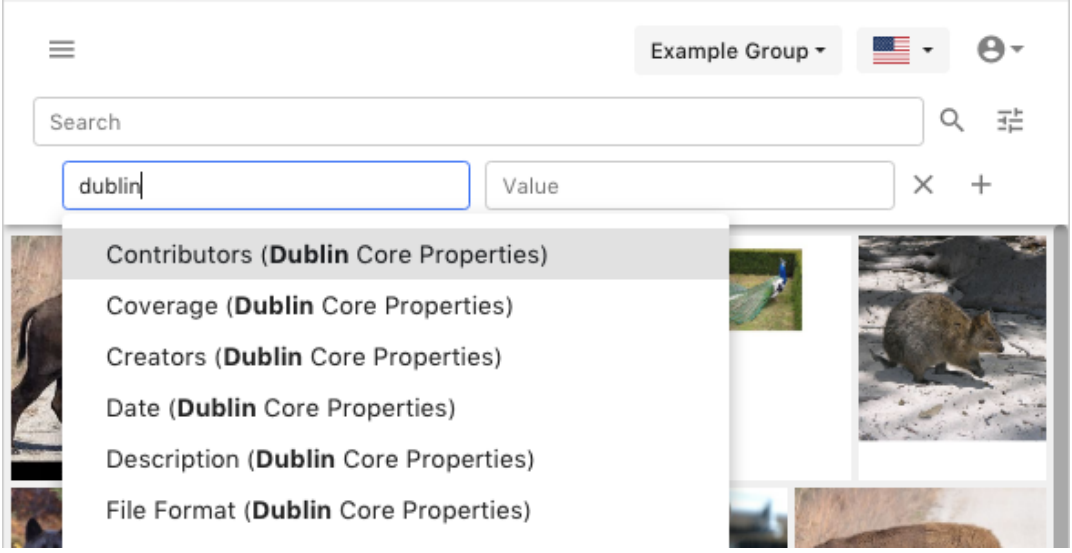
a. **Clear Search** Button ("x" icon): This button clears the current search.
b. **Magnifying Glass** Button: Clicking this button, or pressing the return key will execute the quick search.

Note: Clicking the magnifying glass button when the quick search is empty will reload the assets in the connector's Asset Browser.

6. **Advanced Search**: When clicked, this shows a simplified advanced **search row**. This allows the user to specify a Field and a Value to search for within all ACL assets.

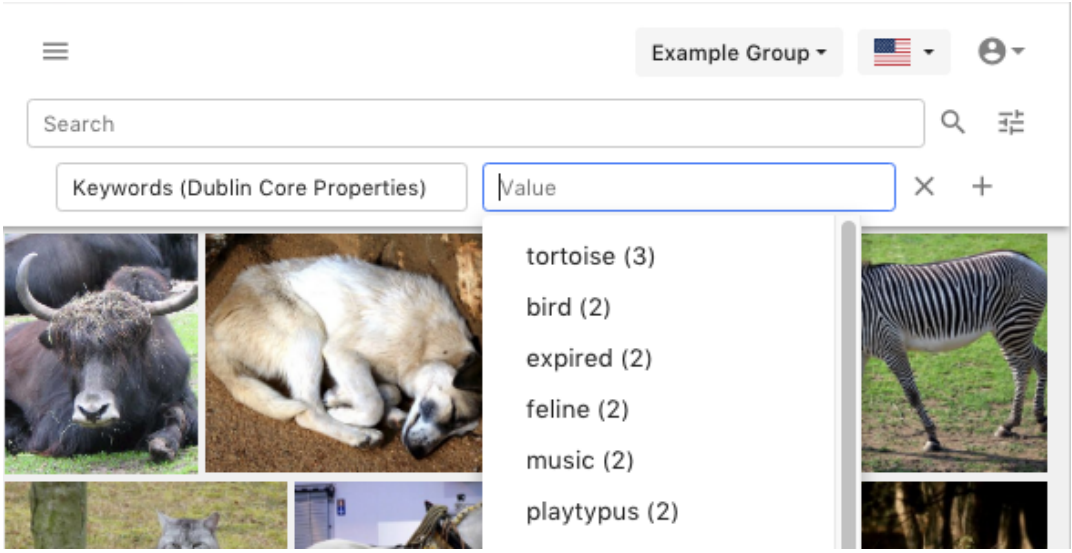


a. **Field**: Allows the user to select a XMP field to search within. Entering text here will display a pulldown with XMP fields that match the entered string.



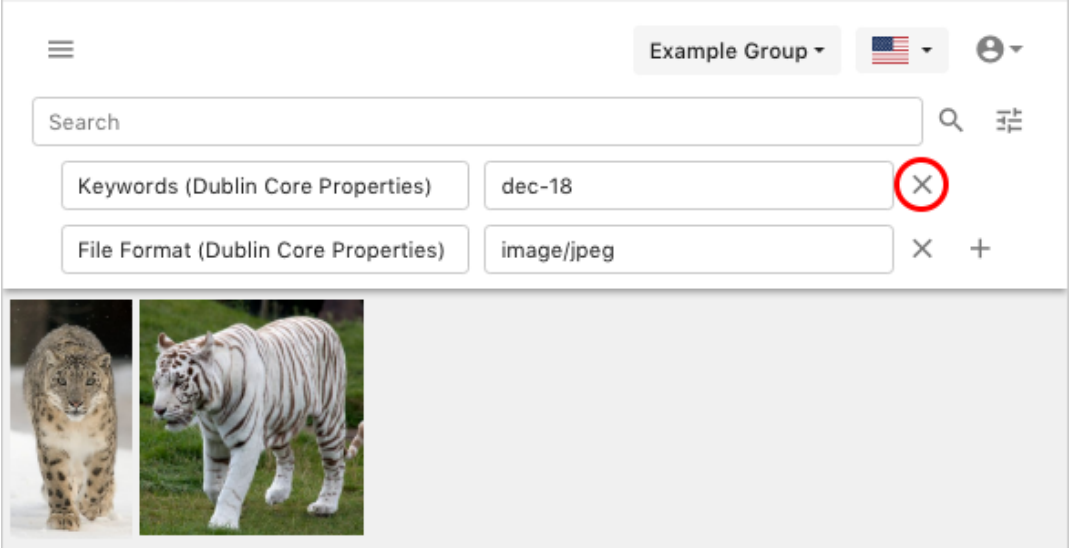
b. **Value**: Allows the user to enter a search value.

   a. Search Filter in Value Field: When a XMP field is chosen, clicking or placing the cursor in this field will show a pulldown menu with values existing in that field, as well as a count of assets containing that term.

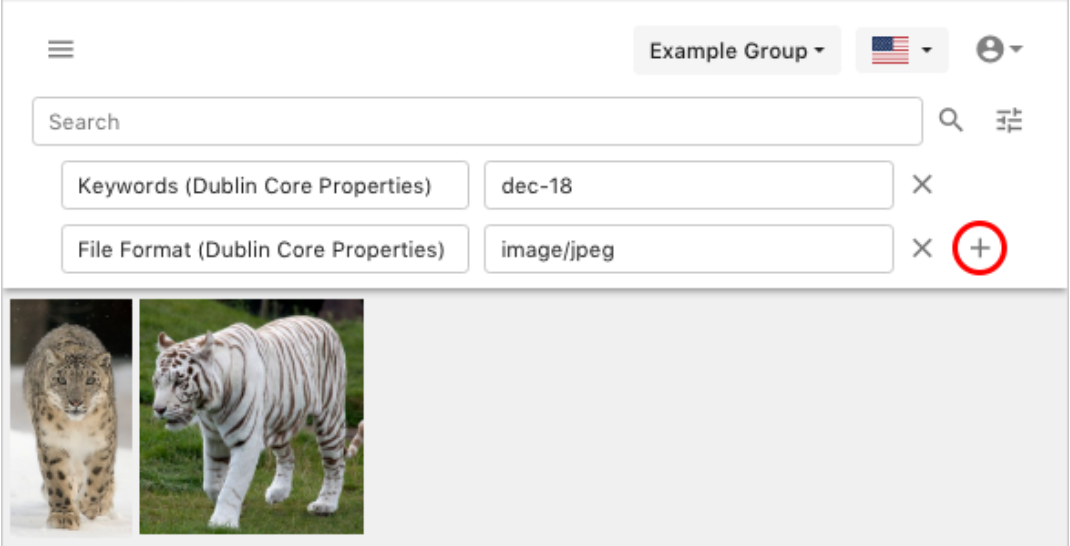


   b. This function is similar to the search filter in the MediaBeacon Web UI, but is not as comprehensive. Each advanced search row's fields do not filter values shown in subsequently added rows.

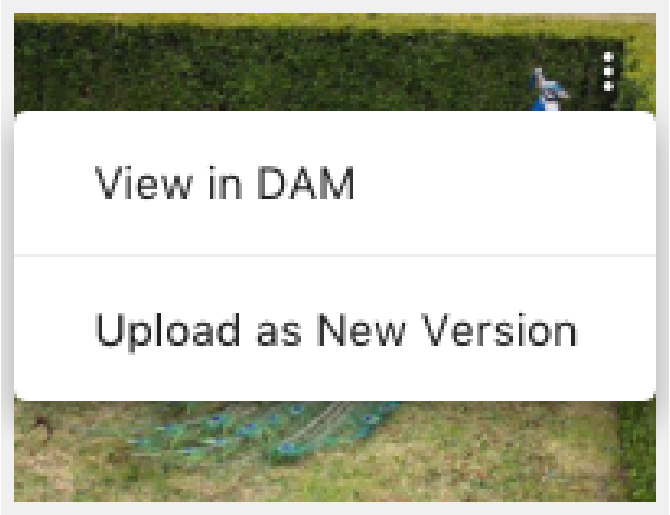
c. **Clear Search Row** Button ("x" icon): This button removes the adjacent search row.



d. **Add Search Row** Button (+ icon): This button adds a search row.



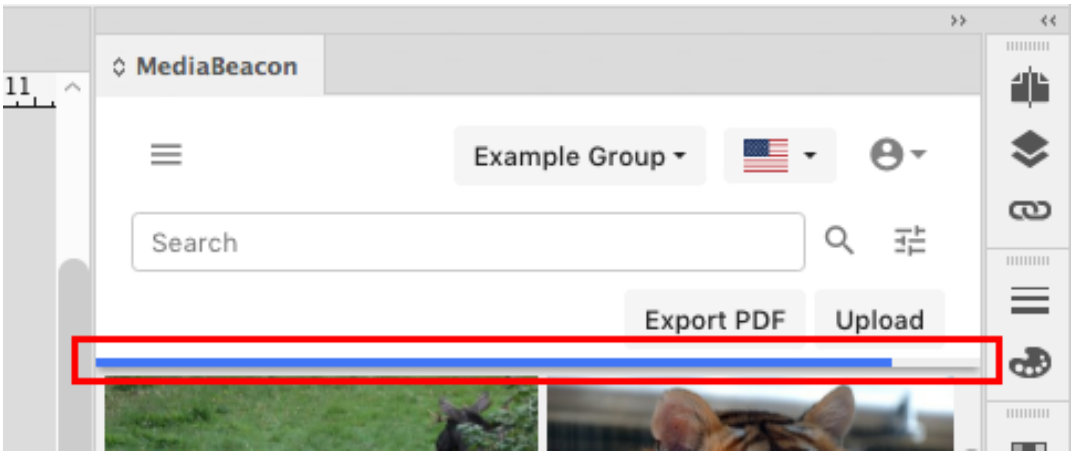
7. **Asset Browser**: Similar to MediaBeacon's Infinite Scroll component, this area shows all assets that are the results of the search terms above. See the Connector Browser Functions section for more information.
8. **Asset Menu**: This icons allows the user to open a pull down menu to perform two commands to a given asset.



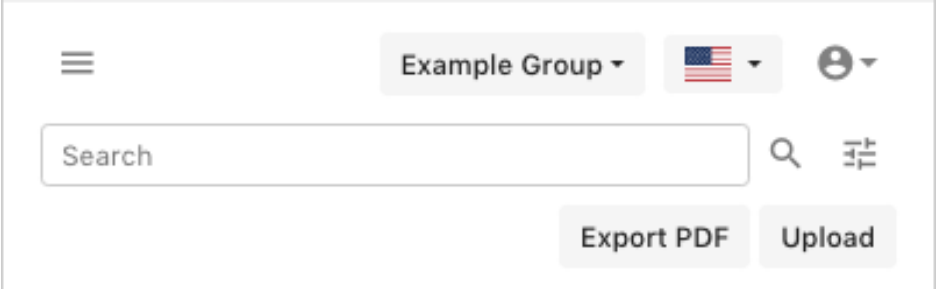
a. **View in DAM**: This command opens a browser window to display the asset's Asset View. This requires the user to login via the browser if not already authenticated.
b. **Upload as New Version**: This command allows the active document (if in a saved state) to be uploaded as a new version of an asset.

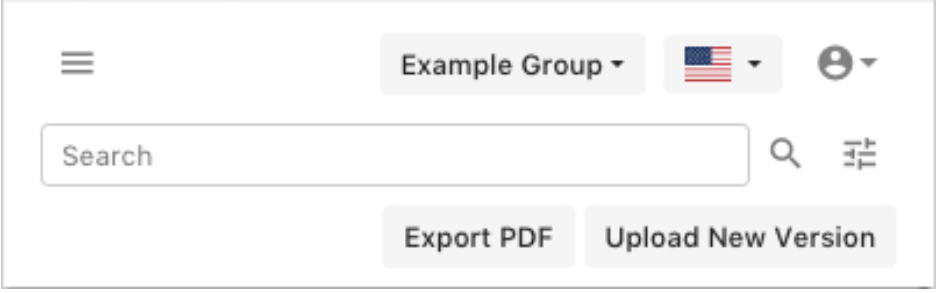
> **Note:** "**Upload as New Version**" menu command vs. "**Upload New Version**" button: The menu command is considered a secondary function, useful when the user wishes to upload a new document as a document version. In most cases, the "**Upload New Version**" button will be preferable.

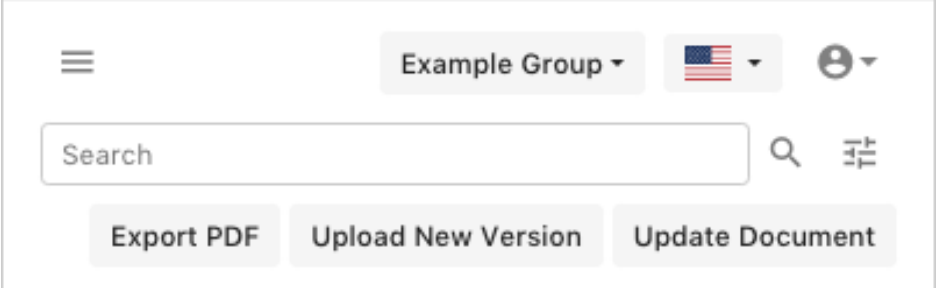
9. **Buttons:** These perform actions based on the state of the active document. See the Connector Button Functions section for more information.
10. **Loading Bar**: This progress bar is shown when the Connector is uploading an asset to MediaBeacon.



Connector Button Functions







Upload

This button is displayed when the active document is saved locally, but is not present inMediaBeacon. Once the upload button has been pressed, the document is synced to the local cache and MediaBeacon through the following procedure:

1. The active document is automatically saved and closed.
2. The document is copied into the local cache.
3. The document is uploaded to MediaBeacon.

4. Finally, the local cache copy of the document is automatically opened. This is the new working copy of this document. The initially saved document may then be discarded.

This button is displayed if all of the following are true:

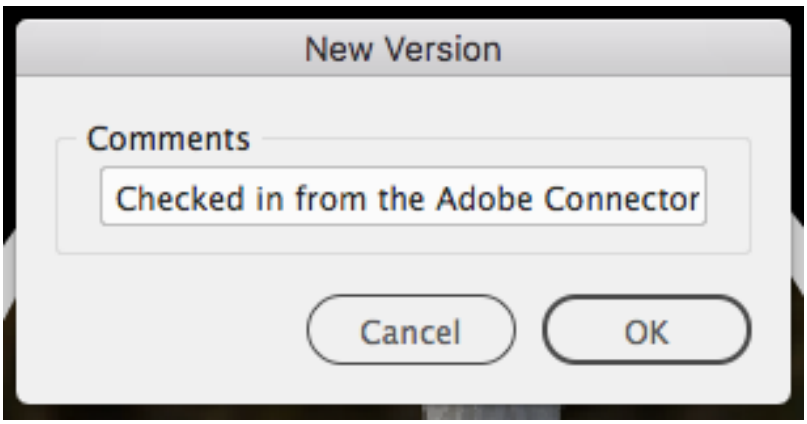
- The active document is saved to user's local disk.
- The active document isn't recognized as a MediaBeacon asset.

Upload New Version

This button is displayed when the current layout document is currently saved and is recognized as an asset currently residing in MediaBeacon.

When clicked:

1. The New Version dialog is displayed, allowing the user to add a comment to the version.



2. Once the "OK" button is pressed, a new version of the asset is uploaded into MediaBeacon. See the *Versions* on page 135 section of the MediaBeacon User Manual for more information.

Using this function keeps the local and MediaBeacon copies of documents in sync.

This button is displayed if all of the following are true:

- The active document is saved to user's local disk.
- The active document is recognized as a MediaBeacon asset.

Export PDF

This will automatically create and upload a PDF of the current layout document toMediaBeacon. This PDF is created using the "Press Quality" preset.

This button is displayed if all of the following are true:

- The active document is saved to user's local disk.

Up- Res

This button is displayed when one or more placed images in the active document are in a "low-res" state. A numeral in the button name indicates the number of placed images in this state.

This state can occur for several reasons:

- An asset has been placed in the active document, but the full resolution version has not been downloaded. See the Placing MediaBeacon Assets section for more information.

- The FPO function was used while placing an image from MediaBeacon. See the FPO Function section for more information.

  Clicking this button will begin the process of downloading the "full-res" (the original) version of the asset to the local cache.

  This button is displayed if all of the following are true:

- The active document contains placed images that end with the thumbnail marker.
  - <filename>.**thumbnail.**jpg

Update Links

This button is displayed when one or more placed images in the active document have been modified in MediaBeacon, or the placed image does not exist in the local cache. A count of placed images with broken links are displayed in the button text.

When the "Update Links" button is pressed, the Update Links dialog will be displayed. See the Update Links Dialog section for more information. Several changes to a placed image can cause this button to be displayed:

- The locally cached placed image has been deleted or moved to another directory on the end user's computer.
  - In this case, Update Links will re-download the asset to the local cache.
- The placed image asset has been moved to another directory in MediaBeacon
  - In this case, Update Links will re-download the asset into the folder structure of the local cache that reflects the asset's location in MediaBeacon.
- A new Version of a placed image asset has been created in MediaBeacon.
  - In this case, Update Links will re-download the current version of an asset.
- A placed image asset has been Replaced in MediaBeacon.
  - In this case, Update Links will re-download the asset.
- A placed image asset has been Deleted in MediaBeacon, but is still present in the local cache.
  - The assets are removed from the local disk, but the placed image links are left intact to inform the user where the images used to be.

This button is displayed if all of the following are true:

- The active document is saved to user's local disk.
- The active document is recognized as a MediaBeacon asset.
- There have been changes made to placed images (in the active document) in MediaBeacon:
  - Placed images have been deleted in MediaBeacon.
  - Placed images have been deleted (or moved from auto download locations in the Cache folder) on the user's local disk.
  - Placed images have been moved in MediaBeacon.

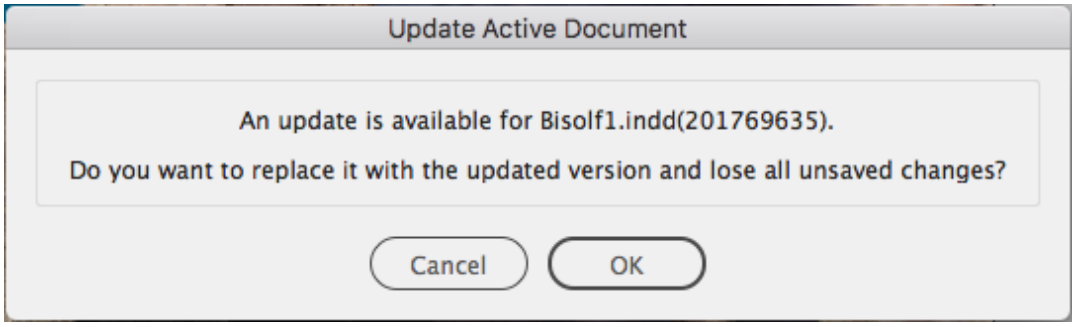
Update Document

This button is displayed when the Connector detects that the currently opened document is older than the copy stored in MediaBeacon. This occurs when another user uploaded a new version of the asset,

or metadata has changed. The Update Document button will close the currently open document, and replace it with the version stored in MediaBeacon.

Note: This function will permanently delete the local cache copy of a document.

The Update Active Document dialog is then displayed, informing the user that unsaved changes to the active document will not be saved.

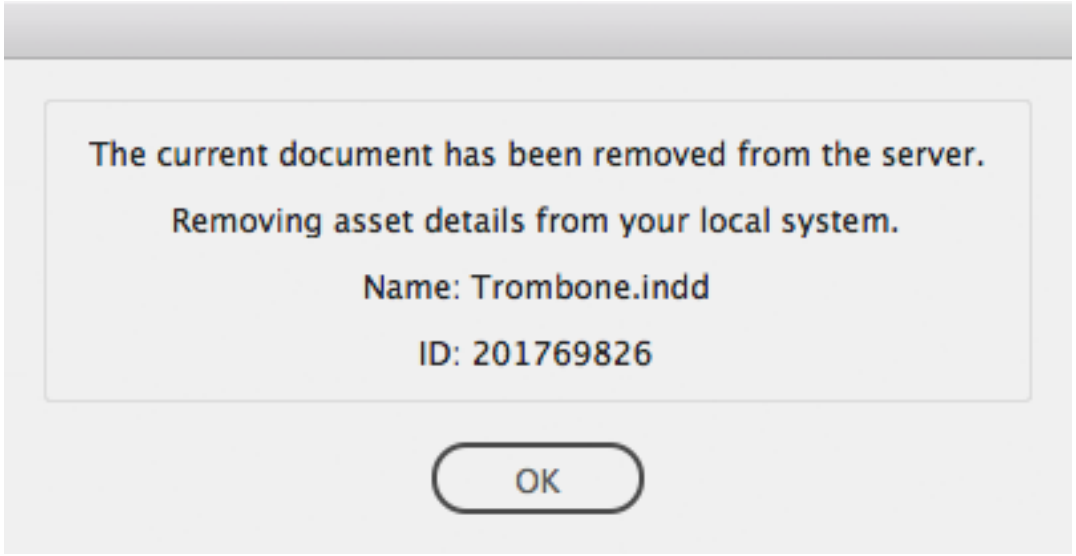


This button is displayed if all of the following are true:

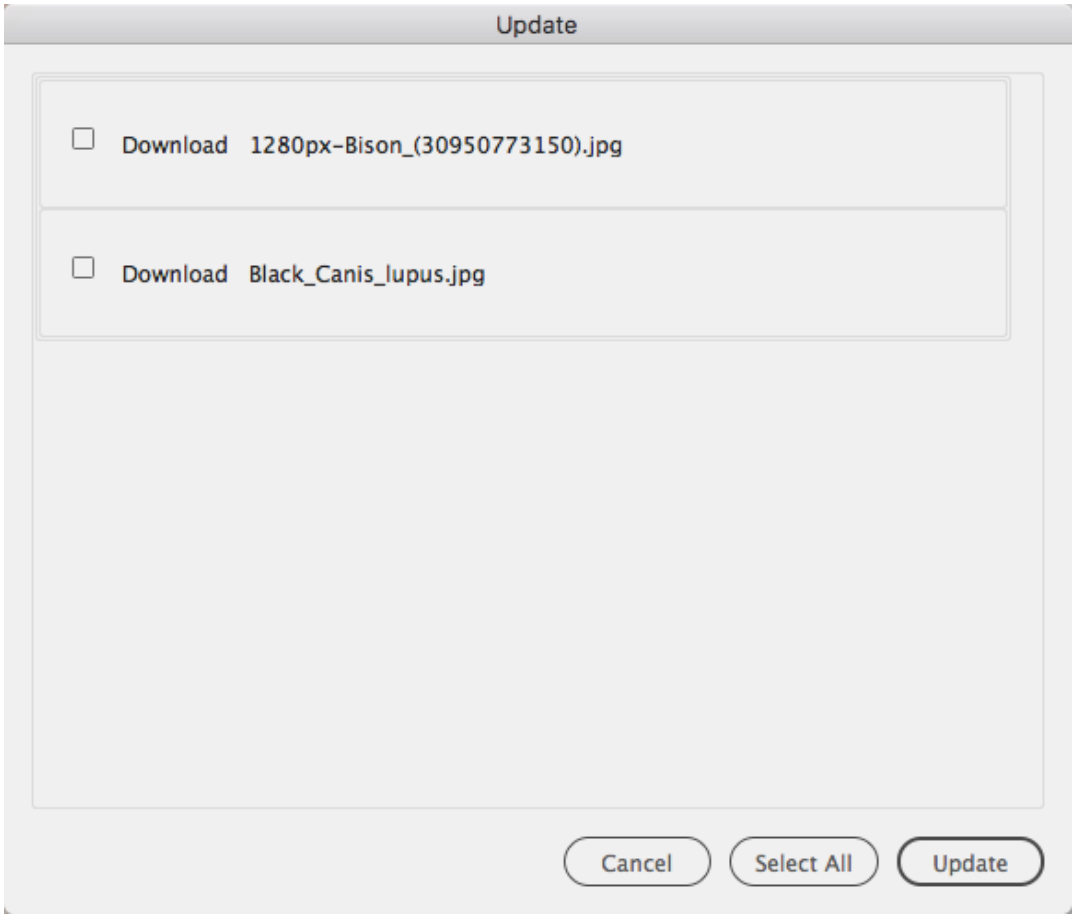
- The active document is saved to user's local disk.
- The active document is recognized as a MediaBeacon asset.
- There have been changes made to the active document (or placed assets used in the active document) in MediaBeacon.
  - Changes that trigger this state can be an update to metadata, or a new version has been uploaded.
  - This function may also be triggered by clicking the asset preview in the Connector asset browser that corresponds to the currently open document.

Deleted Documents

If an active (open) document is deleted in MediaBeacon, the connector will inform the user that the asset has been removed. Clicking "OK" does not remove the document, and if the user is still able to save the document to a local location (such as the desktop) and re-upload if needed.



Update Links Dialog



This dialog is displayed when the Update Links button is pressed, or a layout document (that has placed images which are not in the local cache) is downloaded.

1. The user may choose individual images to download by selecting the checkbox next to each filename, or the "**Select All**" button to select all filenames.
2. Once selections are made, the user clicks the "Update" button.
3. The placed images are downloaded to the local cache, and the broken links in the Links Panel will be resolved.

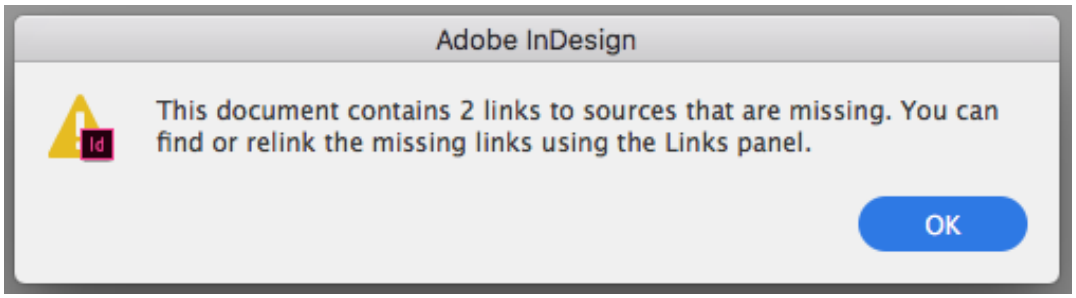
Connector Browser Functions

Opening Assets

If an asset is a file type that can be edited by the current Adobe® application, single-clicking the asset will copy it to the user's local cache, and open it for editing.

Opening Layout Document Assets with Placed Images

When the active layout document has placed images that are not currently in the local cache, the user will be presented with a standard missing links dialog.



Once the user clicks "OK", the Update dialog will be displayed. See the Update Links Dialog section for more information.

Contextual Filtering

The view of assets on the Connector's browser is filtered by file type, depending upon the application that is being used. The MediaBeacon Default "File Format" field data will be used. See the application sections below for more information.

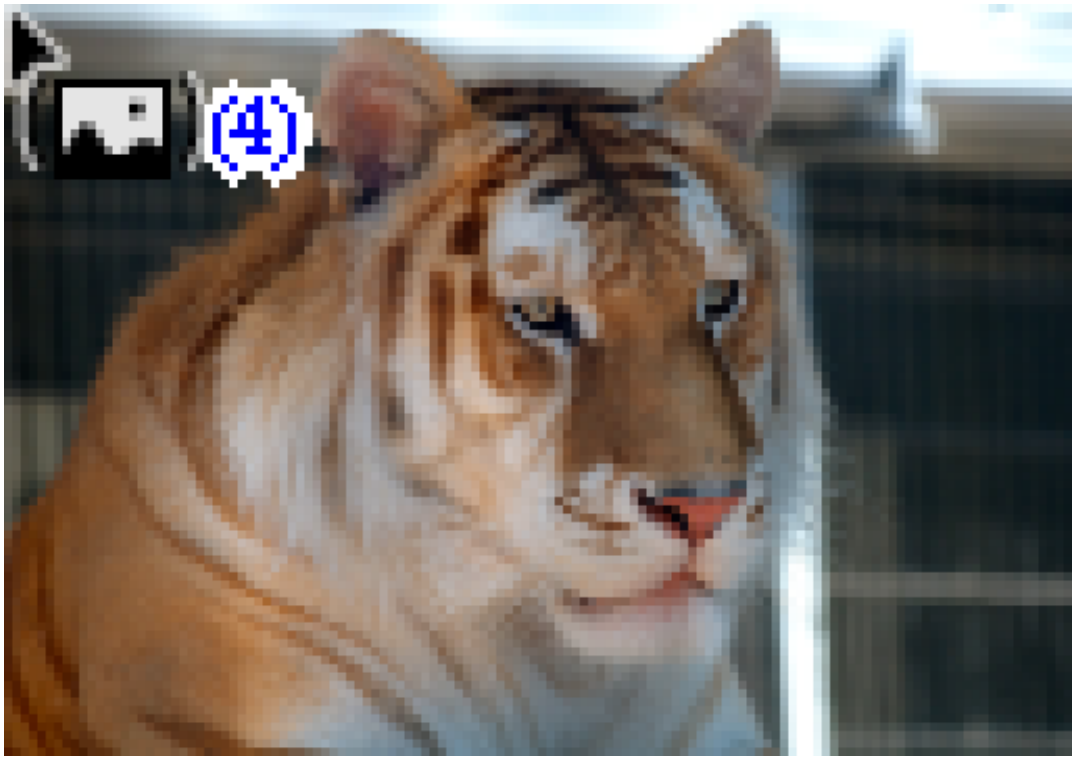
Placing MediaBeacon Assets

Assets housed in MediaBeacon can be placed directly into a layout document.

Several actions occur in the background automatically:

1. An Asset ID reference is placed. This only occurs in Illustrator. In this case, the Connector immediately swaps this out for and moves to step 2:
2. A thumbnail image (AKA FPO image) is automatically placed.
3. In the background, the original (aka full-res) version of the asset begins to download to the local cache.
4. When fully downloaded, the FPO image is seamlessly replaced by the full res version in the local cache and in the layout document.

To place an asset, the asset may be drag-and-dropped or multiple assets may be clicked to "preload" them to InDesign's cursor.



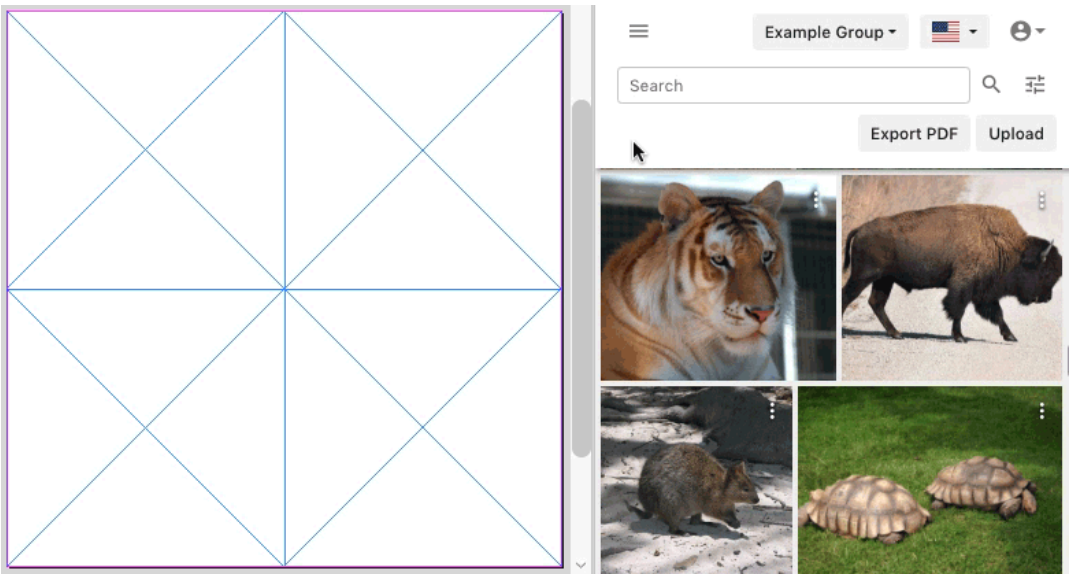
Drag-and-Drop:

1. Left-click, hold and drag from the Connector's Asset Browser to a page region of an open layout document.
2. Release the left mouse button.
3. When the cursor changes to display an image thumbnail of the image, left-click to place the image at 100%, or left-click, hold and drag to define the size of the placed image, or drop into an image frame.

Note: When using InDesign®, it is not necessary to 'drag' an image from the connector's asset browser to the active document. The action is just as easily accomplished with a "cursor loading" action, see below.

Cursor Loading: When a user has clicked multiple assets in the Connector asset browser, InDesign's® cursor will indicate a "stack" of assets to place (when moved over the page area of a layout document).

The user may then left-click to consecutively place each image at 100%, or left-click and drag to define the size of the placed image, or drop into an image frame.



Note that the assets clicked in the asset browser will show a selected

Loading Bar: When clicked, a thumbnail asset will briefly show a loading bar underneath an image preview. This is indicating that an FPO (aka thumbnail) image (maximum size 512x512 px) is being downloaded to be used for initial placement. At the same time, the original asset will start downloading. This allows the image to be placed without waiting for full image download. Once the original image is downloaded, it automatically replaces the thumbnail on disk and in the Links panel.

When very large assets are placed, or the file transfer is slow, the "Up-Res" button may be displayed while the full-size version of an asset is downloading. This allows the Connector to avoid interrupting the flow of design work.

Refresh Asset Browser

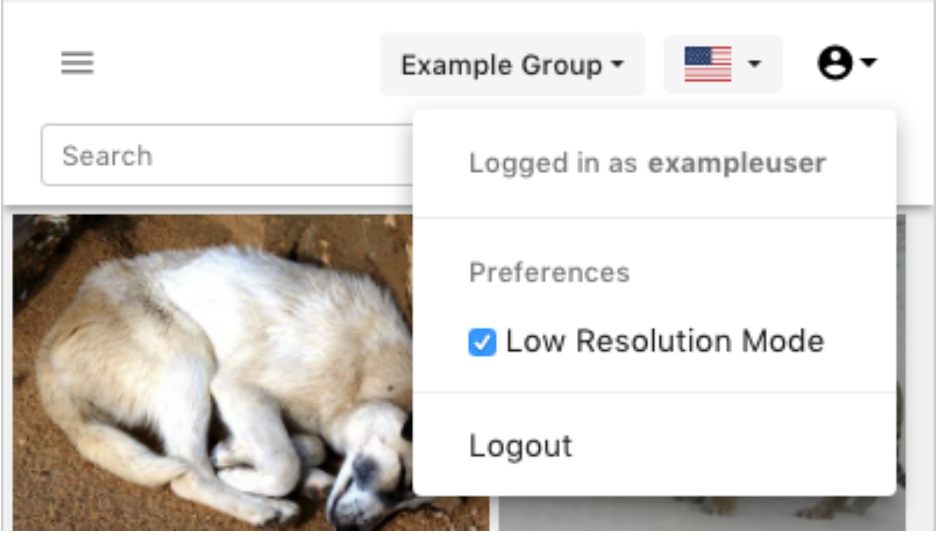
To refresh the list of assets:

1. Click the Folder Browser Toggle button.
2. Click the "Index" button.
3. Click the Folder Browser Toggle button.

FPO / Low Resolution Mode

This option allows the Adobe® Connector to always place FPO images, and only download the originals manually. To use the function, choose the "Low Resolution Mode" in the User Menu.

In this state all downloaded images will initially be "thumbnail" images <filename>.**thumbnail.**jpg, and will be automatically replaced and relinked when the "Up-Res" button is pressed.



The Low-Resolution function's will remain activated (or deactivated) for all supported applications on a given computer until toggled.

Using the Connector with InDesign®

The Connector's functions as described above are consistent when used with InDesign.

- Asset Browser Filtering in InDesign: "File Format" Equals "Graphics" OR "File Format" Equals "InDesign" OR "File Format" Equals "PDF"

Using Show Import Options

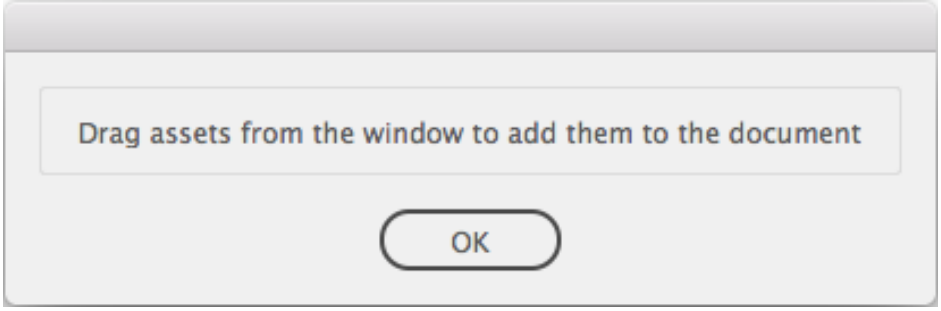
In order to use the "Show Import Options" InDesign® function with images in the Connector asset browser:

1. File > Place.
2. In the Place Dialog, enable the "Show Import Options" checkbox.
3. Select a local image, and click "open".
4. Place the image and then remove it.

In this state, any images placed will show import options.

Using the Connector with Illustrator®

- Adding assets to a layout document must be done with a drag-and-drop, the cursor loading function is not present in Illustrator. When an asset is clicked, a reminder dialog box will be displayed.



- EPS files cannot be uploaded.
- Asset Browser Filtering in Illustrator: "File Format" Equals "Graphics".

Using the Connector with Photoshop®

- For clarity, when using Photoshop®, the "Upload" button will upload the active document, as there is no concept of a "layout document" in Photoshop.
- The Connector cannot be used to place images in Photoshop® documents.
- Photoshop® links are not managed by the Adobe® Connector or MediaBeacon.
- Asset Browser Filtering in Photoshop: "File Format" Equals "Graphics".

4.2. Clarifai® Connector

Use the Clarifai® AI to automatically tag assets with metadata.

Clarifai®

The Clarifai® Connector enables automatic metadata tagging in MediaBeaconfor images or videos. Assets may undergo the tagging process automatically or manually, and are returned with suggested keywords, along with a confidence score for each term.

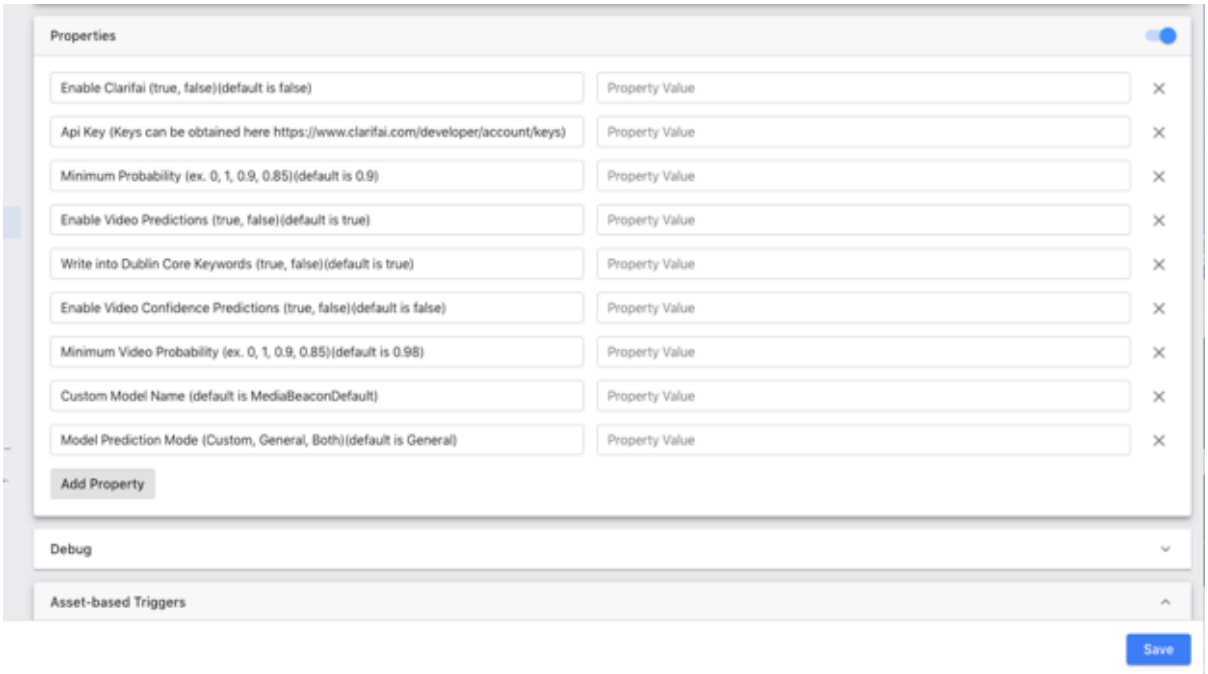
Installation and Configuration

TheMediaBeacon Clarifai® Connector is installed via a licensed package.

Once the package is installed, configure the connection.

1. In theMediaBeacon Web UI, in Admin **>** Workflows, navigate to the following workflow:
   a. Workflow Name: ClarifaiManager
   b. For the workflow settings, set these Properties to be relevant to your system and installation.
   c. The properties that can be set include:
      a. API Key (required).
      b. Enabling the Clarifai integration.
      c. Choosing the mode prediction mode – general, custom, or both.
      d. Setting the minimum probability for keywords to be returned.
      e. Enabling video predictions.

f. Enabling writing to Dublin Keywords.
g. Defining which custom model to use.

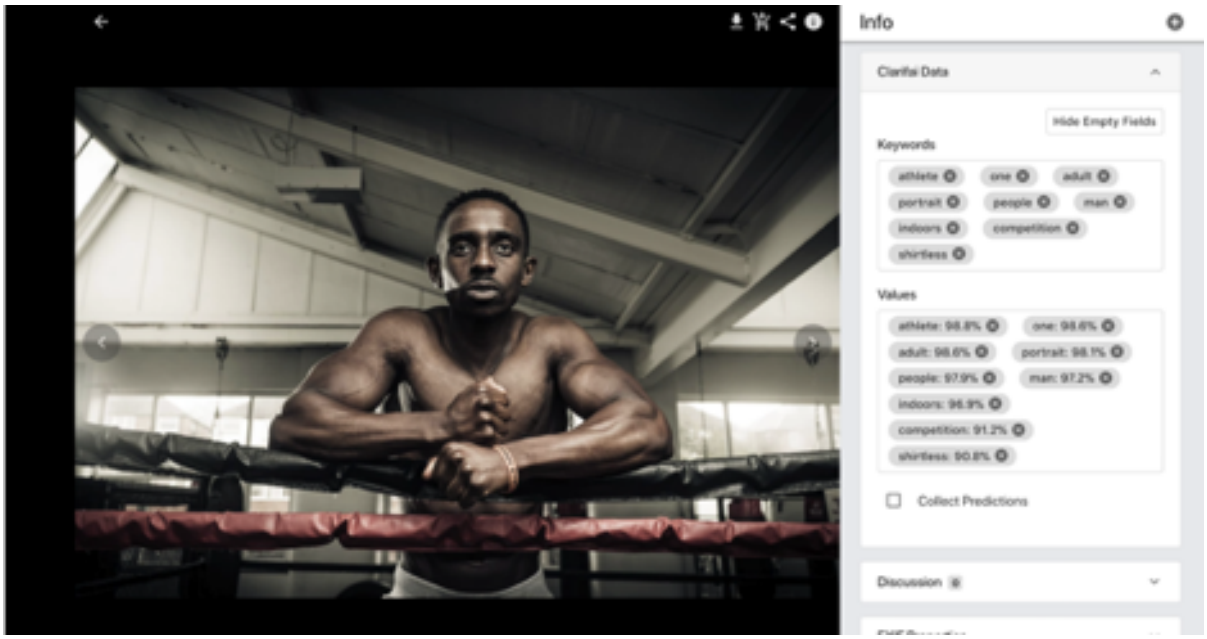


How to Trigger Asset Tagging

Tagging can be triggered automatically or manually.

1. Automatically: The standard workflow triggers can be used to automate tagging of the asset.
   Note: When an asset is re-imported and new previews are generated, the asset is re-sent for keyword predictions.
2. Manually: The "Collect Predictions" box can be checked in the asset Form to manually trigger tagging of the asset.

Once the asset has been run through Clarifai®, the results will appear in the Keywords field, if writing to Dublin Keywords is not disabled via workflow property. They will also populate the Values field, along with the relevancy score. Keywords may be manually removed and added in this form.

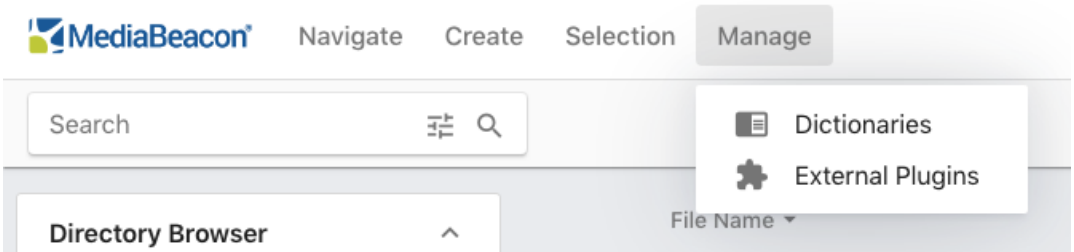


4.3. Microsoft Connector

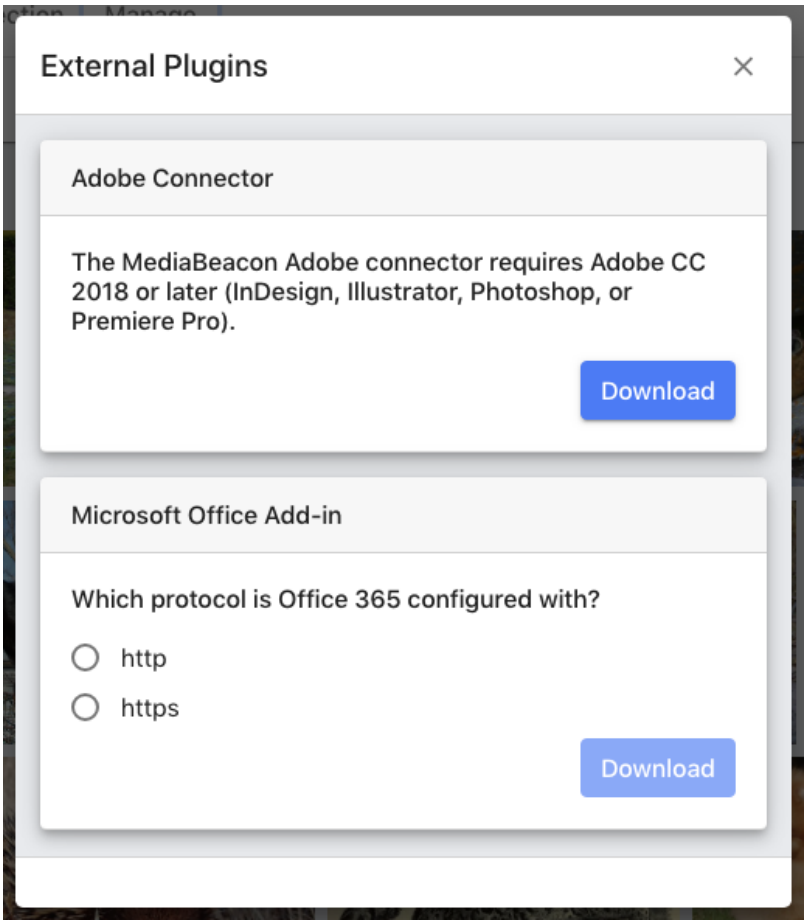
The MediaBeacon Office Connector allows users to search for and export digital assets from the DAM directly into their Microsoft Office interface.

Installing the Connector

1. In the menubar, choose the Manage **>** External Plugins command.



2. The External Plug ins dialog will be displayed. Click "Download".



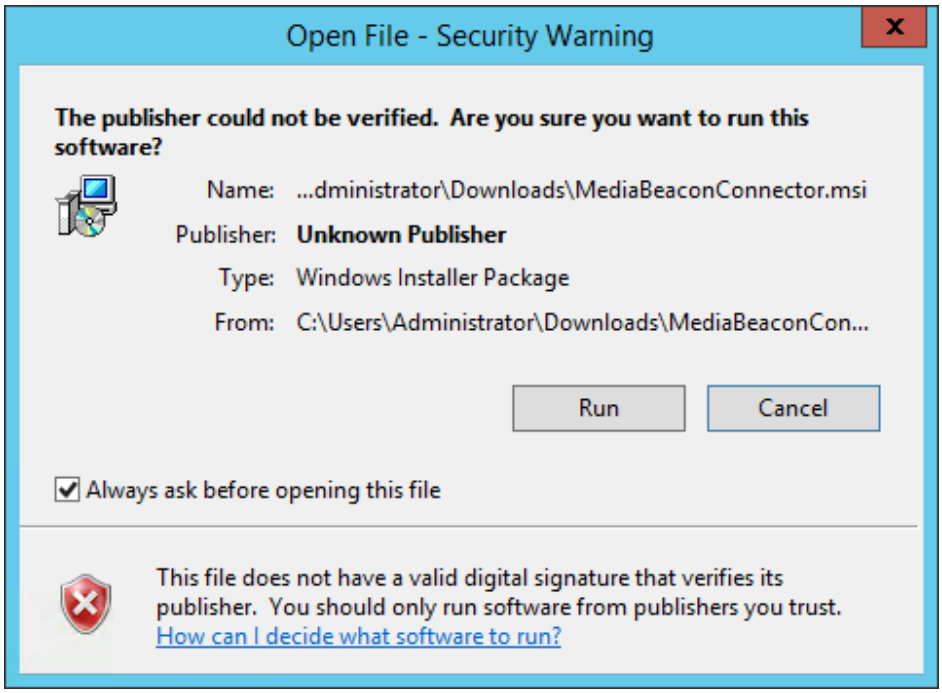
3. Once the .xml has downloaded, follow the directions below for your Office applications

Note: MediaBeacon must be running with HTTPS, otherwise the Connector won't load the window properly

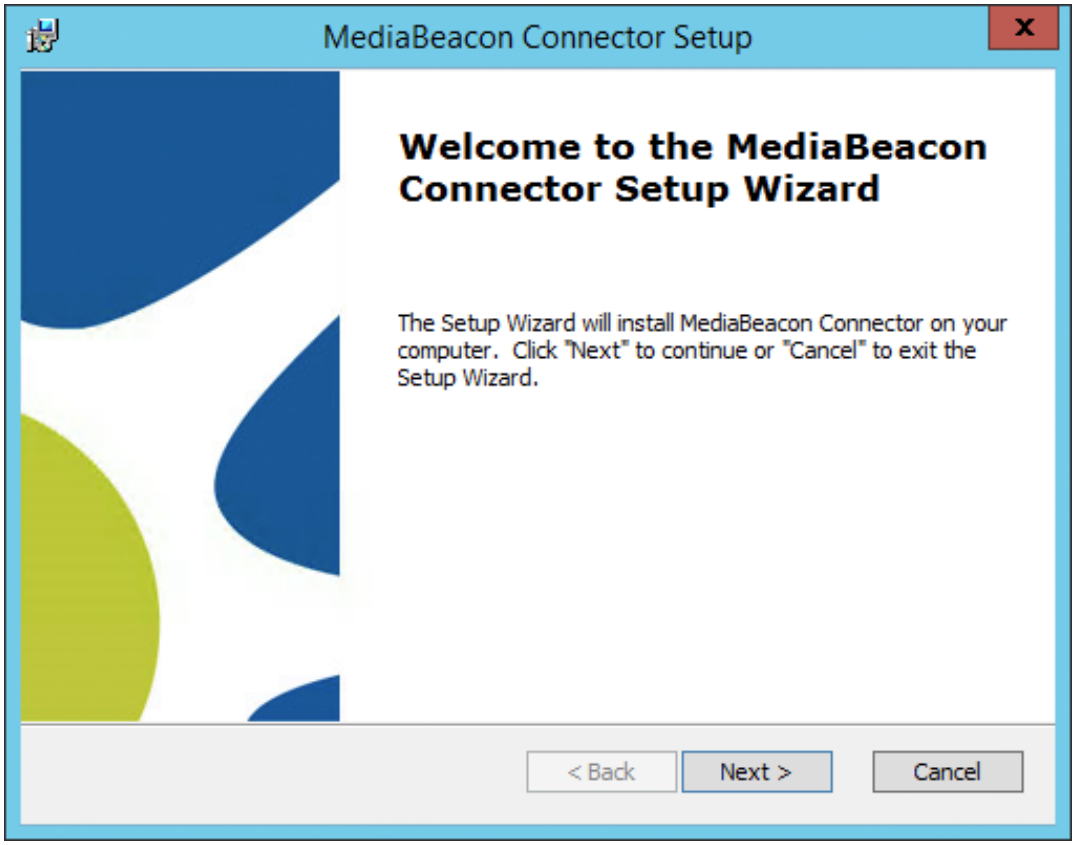
Note: Connector requires Windows 10, as that is the version of Windows that uses the Edge browser in its apps

Windows

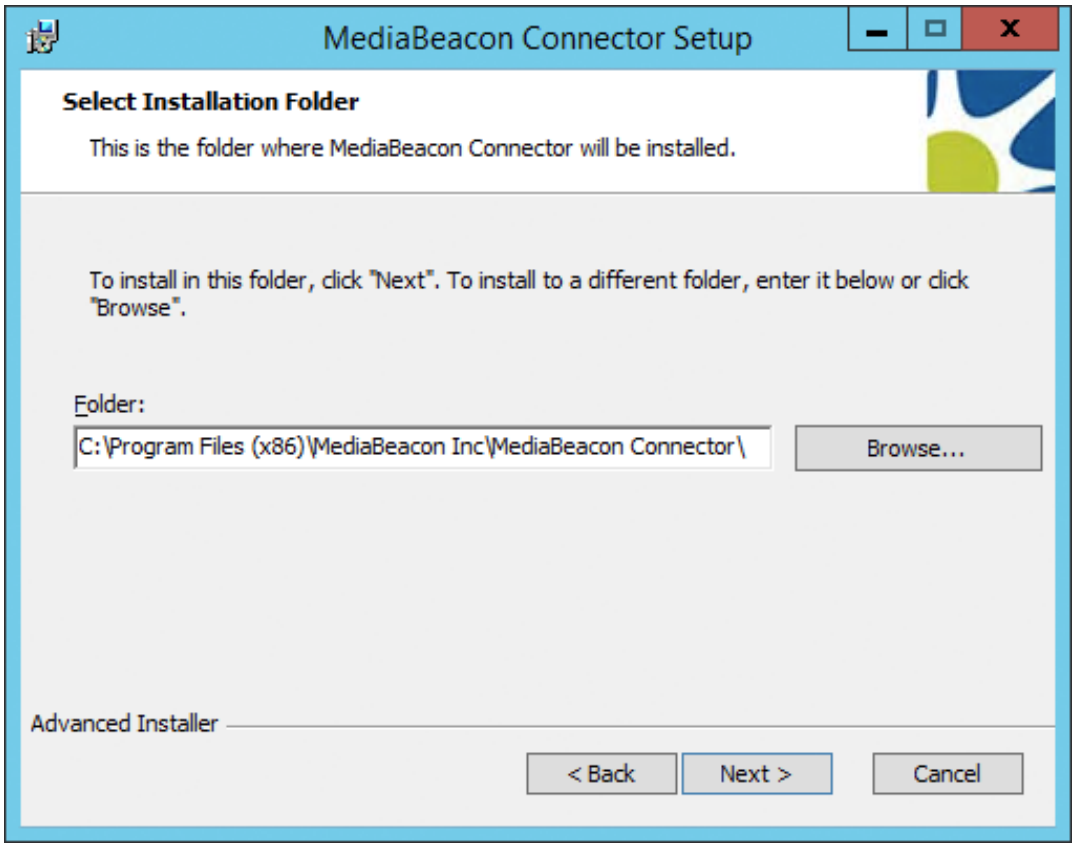
1. The file "MediaBeaconConnector.msi" will be downloaded to the user's default download location.
2. Open the "MediaBeaconConnector.msi" file, click "Run".



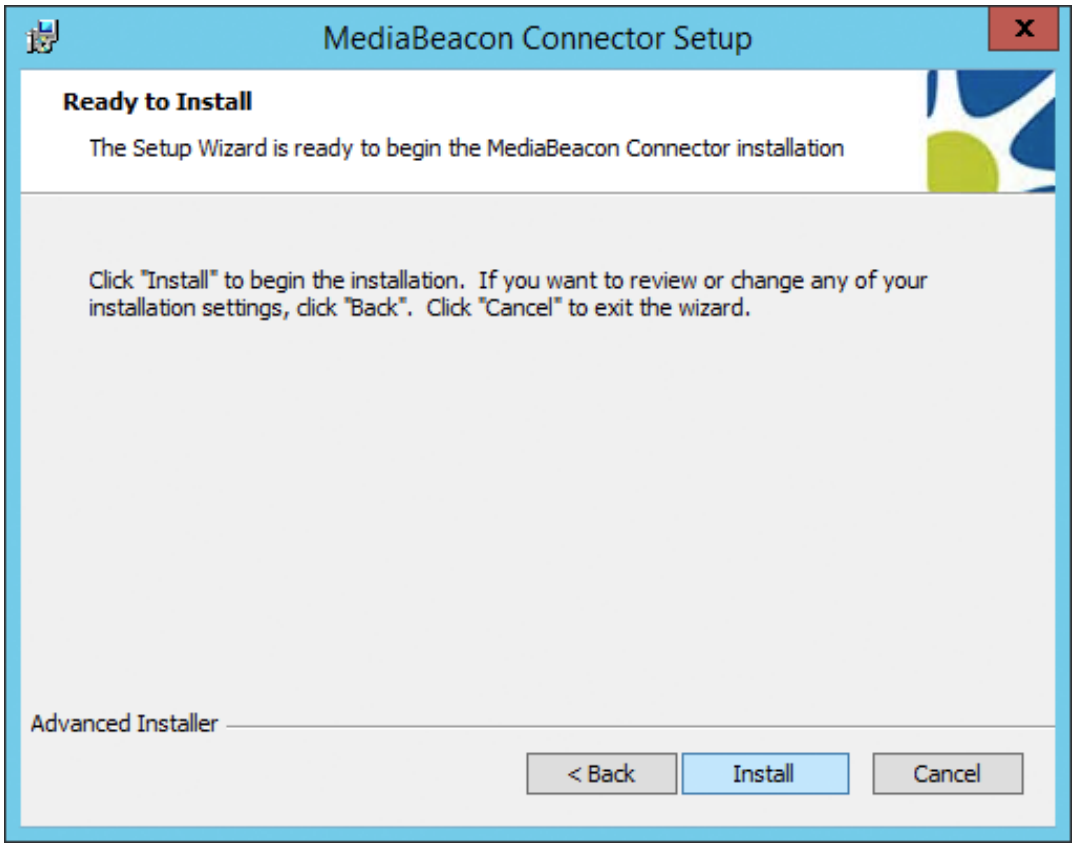
3. The "Welcome to the MediaBeacon Connector Setup Wizard" screen will be shown, click "Next".



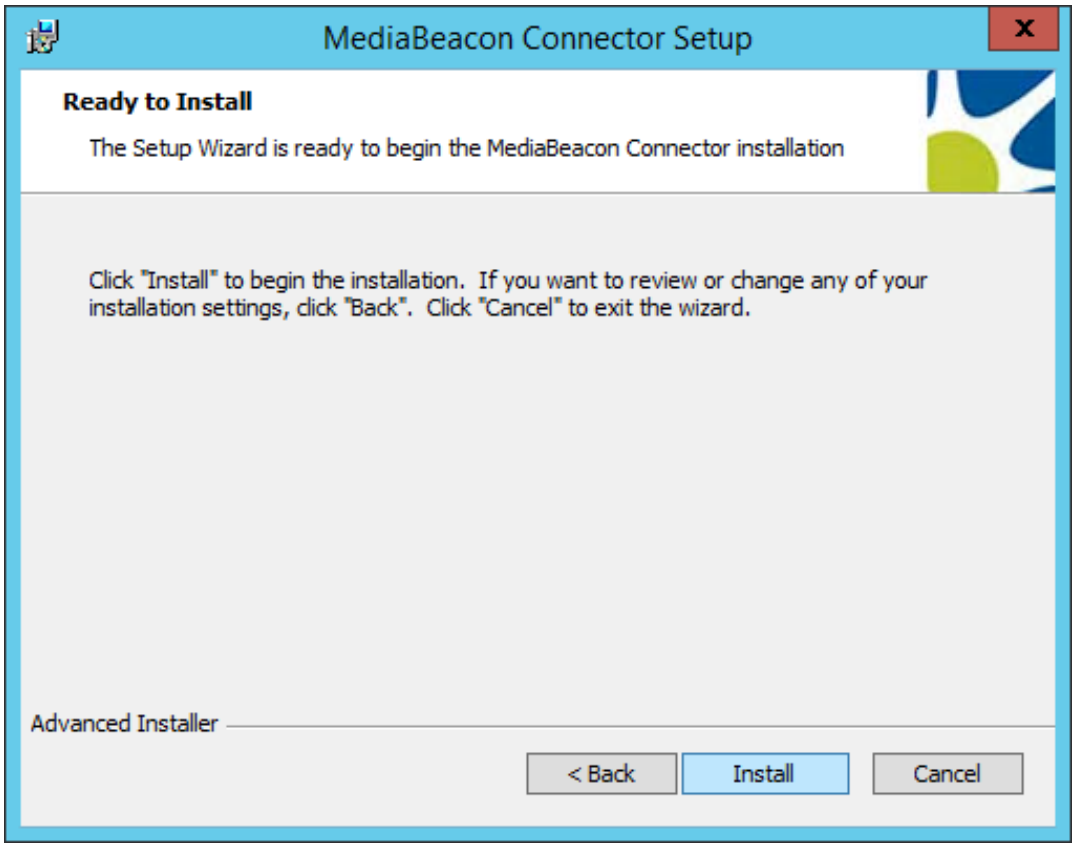
4. On the next screen, "Select Installation Folder", click "Next".



5. On the next screen, "Ready to Install", click "Install". The software will be installed.



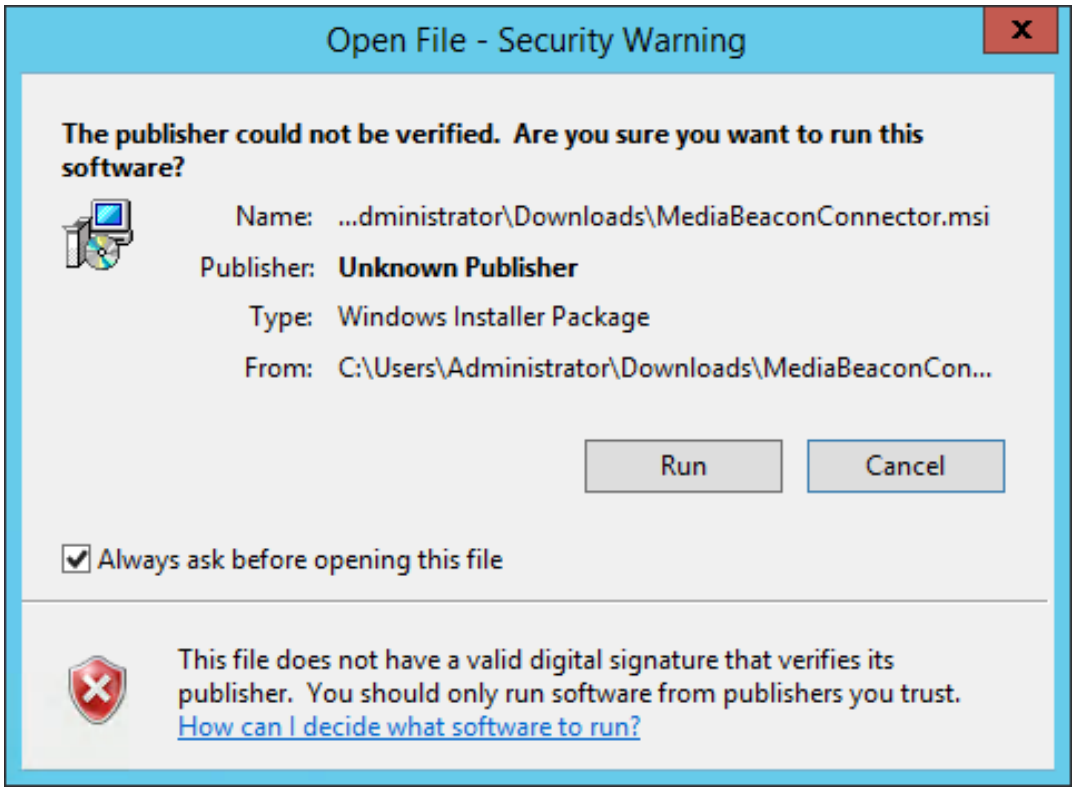
6. On the next screen, "Completing the MediaBeacon Connector Setup Wizard", click "Finish".



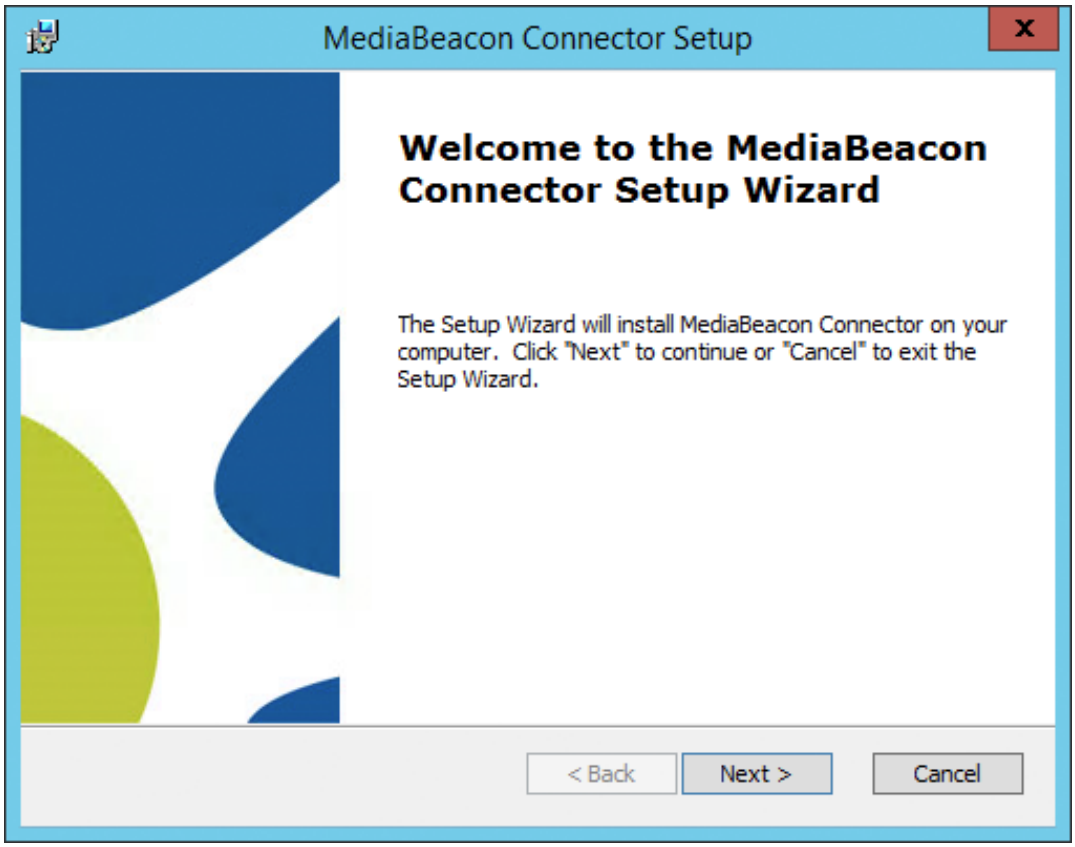
Uninstalling the Connector

Windows

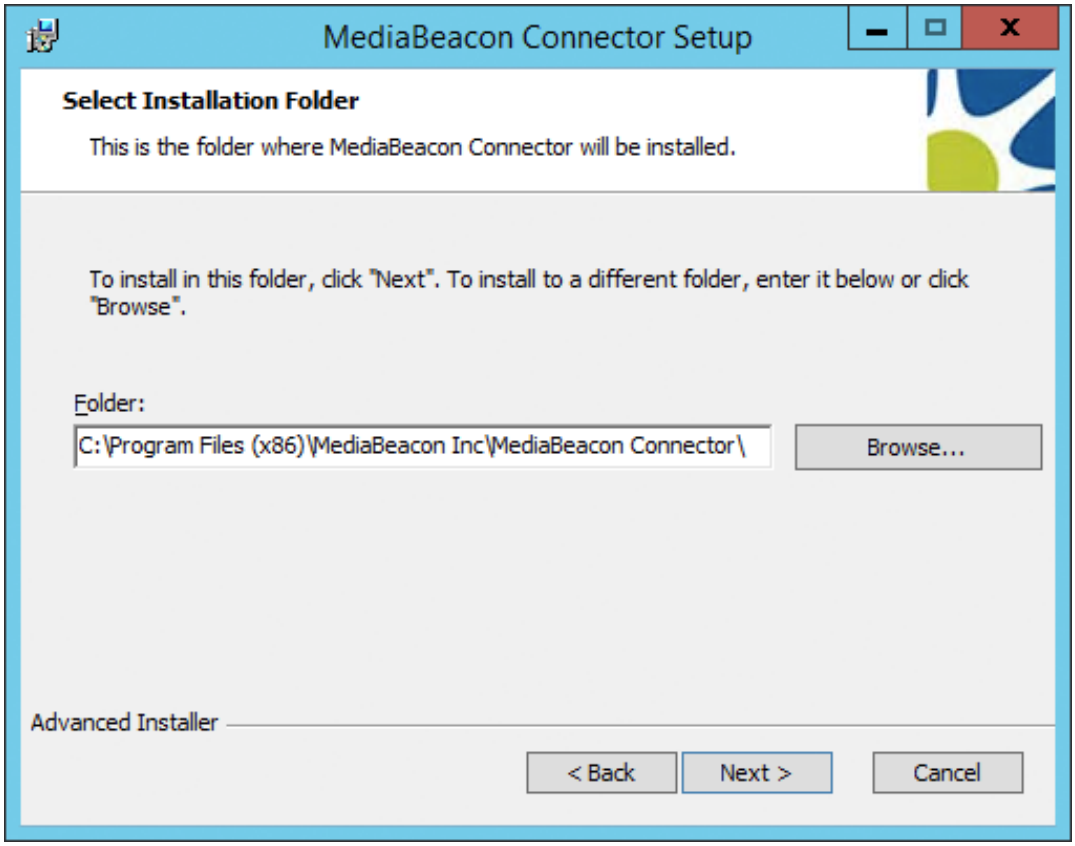
1. The file "MediaBeaconConnector.msi" will be downloaded to the user's default download location.
2. Open the "MediaBeaconConnector.msi" file, click "Run".



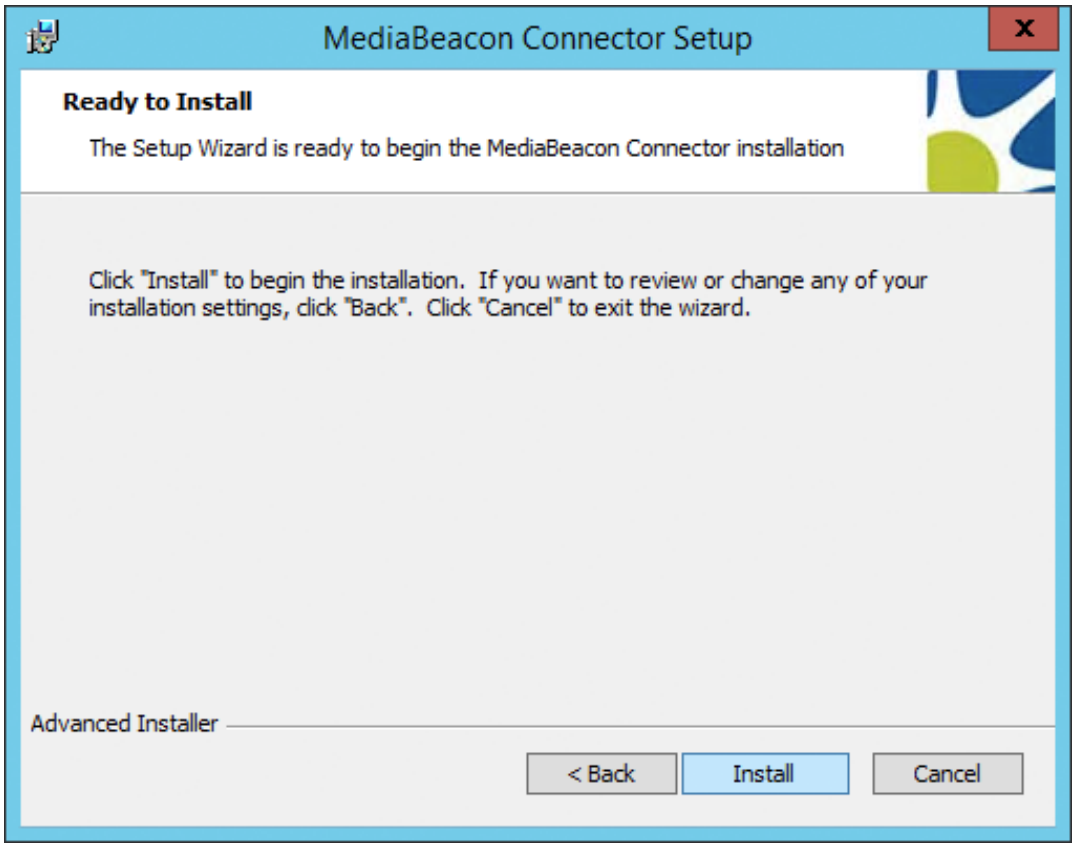
3. The "Welcome to the MediaBeacon Connector Setup Wizard" screen will be shown, click "Next".



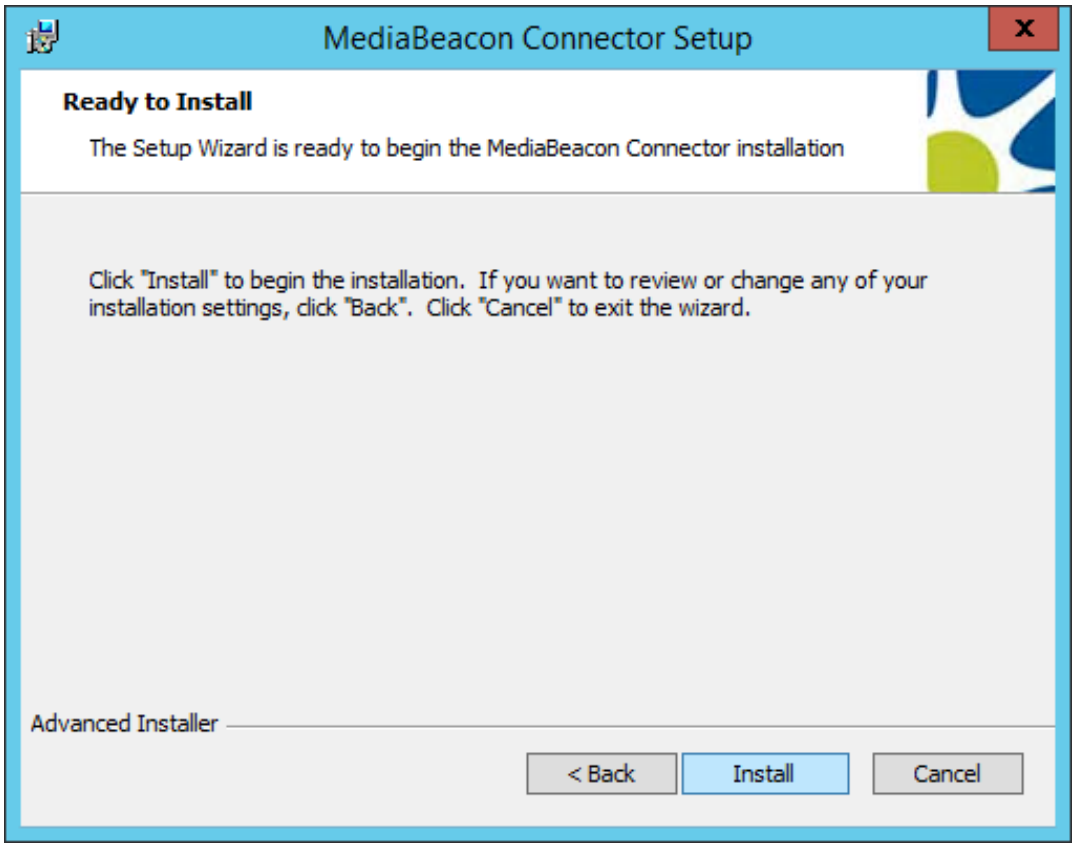
4. On the next screen, "Select Installation Folder", click "Next".



5. On the next screen, "Ready to Install", click "Install". The software will be installed.



6. On the next screen, "Completing the MediaBeacon Connector Setup Wizard", click "Finish"



4.3.1. Sideload(dev) Office Connector

1. Sideload Office Add-ins:
   a. Mac: Copy the xml to these folders. If the folder doesn't exist, create a new one.

      ~/Library/Containers/com.microsoft.Powerpoint/Data/Documents/wef/ ~/Library/Containers/com.microsoft.Word/Data/Documents/wef/
   b. Windows:
      a. Share a folder
         - On the Windows computer where you want to host your add-in, go to the parent folder, or drive letter, of the folder you want to use as your shared folder catalog.
         - Right Click the context menu for the folder.
         - Choose Properties.
         - Open the Sharing tab.
         - Add yourself and anyone else with whom you want to share your add-in on the Choose people ... page.

           If they are all members of a security group, you can add the group. Make sure that you have Read/Write permission to the folder.

         - Choose Share **>** Done **>** Close
      b. Specifying the shared folder as a trusted catalog.

- Open a new document in Word, or PowerPoint.
- Choose the File tab, and then choose Options.
- Choose Trust Center, and then choose the Trust Center Settings button.
- Choose Trusted Add-in Catalogs.
- In the Catalog Url box, enter the full network path to the shared folder catalog, and then choose Add Catalog.
- Select the Show in Menu check box, and then choose OK.
- Close the Office application so your changes will take effect.
- Right click the context menu for the folder
- Choose Properties

c. Sideload your add-in:

- Put the manifest file of any add-in that you are testing in the shared folder catalog. Note that you deploy the web application itself to a web server. Be sure to specify the URL in the SourceLocation element of the manifest file.
- In Word, or PowerPoint, select My Add-ins on the Insert tab of the ribbon.
- Choose SHARED FOLDER at the top of the Office Add-ins dialog box.
- Select the name of the add-in and choose OK to insert the add-in.
- Restart the Office Application.

4.3.2. Open MediaBeacon in Word or PowerPoint

Open Add in:

1. Open MS Word or PowerPoint
2. Go to Insert Tab
3. Click on the down arrow next to “MyAdd-ins” button to see a drop down.
4. Choose “MediaBeacon Connector"
5. Login into MB with office/test credentials.