

MediaBeacon 24.03

Administrator Guide

03 - 2024

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1. Welcome to MediaBeacon's Administrator Guide

Welcome to MediaBeacon's guide for application administrator-level users of our product.

This guide is divided into two main sections:

- [Web UI Configuration](#), configuration of workspaces, components, and other parts of the MediaBeacon Web UI.
- [Admin Core](#), configuration of front-end Administrative functions in MediaBeacon.

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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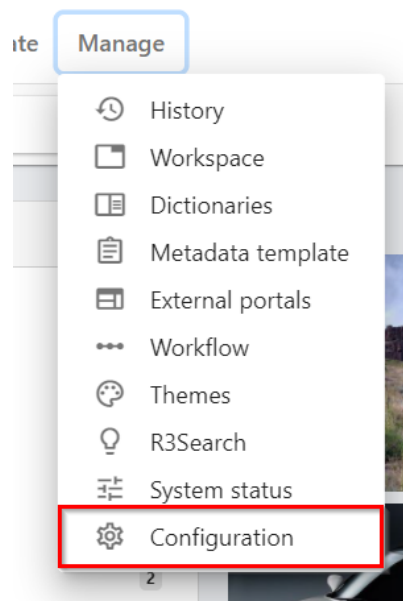
info.eur@esko.com

3. MediaBeacon 21.11x Interface Changes

This section details the new interface updates of MediaBeacon 21.11 and later.

Overview of Nomenclature changes

- In the Administrator menu commands, the System menu has been renamed to Configuration. Other functions remain the same



- Saved Selection has been renamed to Save Collection, and alternatively, Load Selection is now Load Collection. Load collection can be accessed as a Menu bar icon. For more details refer to [Save Collection](#).

- Concurrently, the Saved Selection component is updated as the Collections component, and the Saved Selection in Places Browser as Collections Place.

Figure 1: Save Collection

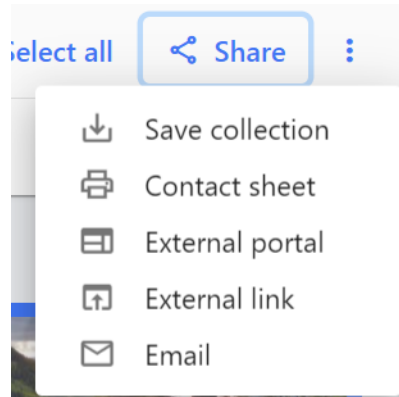
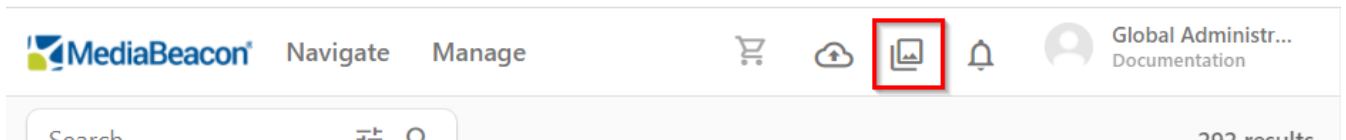
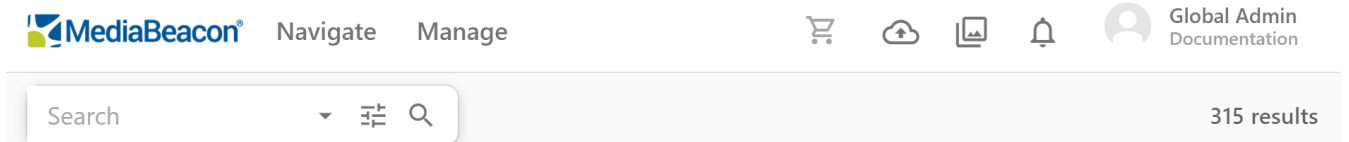


Figure 2: Load Collection Icon

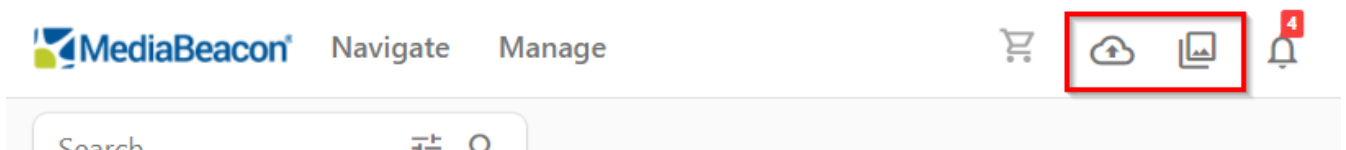


Menu bar

The 21.11 Menu bar has been focused more on the accessibility of the common features.

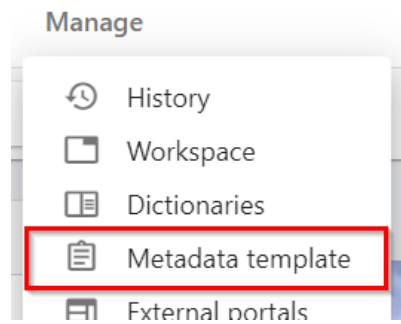


- The users can find the Create button being disbanded and the most used features; Upload and Load Collection are displayed as icons on the right side along with Notification Center and Cart option.



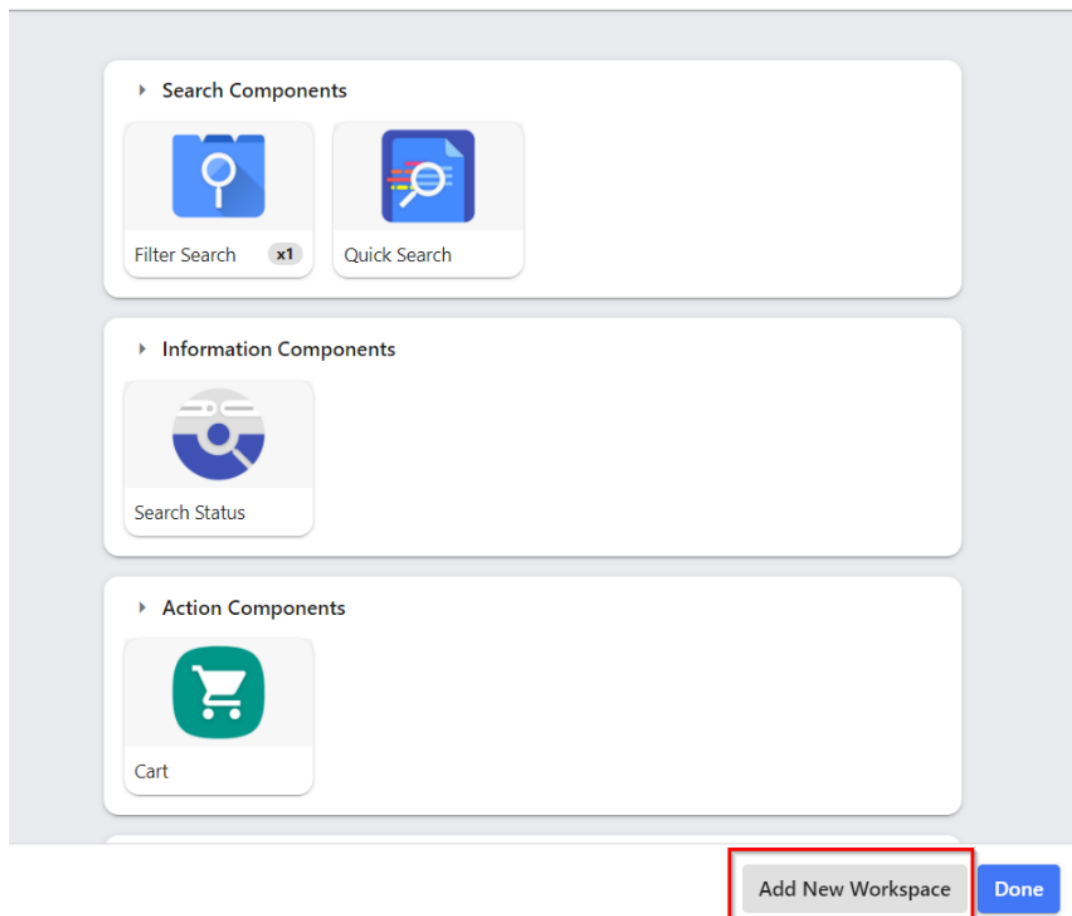
Create Menu

- As the Create menu is now disbanded, the Metadata template can be accessed from the Administrator Menu Commands.



- Upload command can be accessed via Upload icon on Menu bar. Clicking Upload icon provides the following options:
 - Create Data Asset (Previously Data Asset submenu)
 - Upload
- Saved Selection is now Save Collection and users can save asset collection from Selection Bar > Share > Save Collection.
- Creating workspace can be accessed via Manage > Workspace > Add New Workspace.

← Manage Workspace



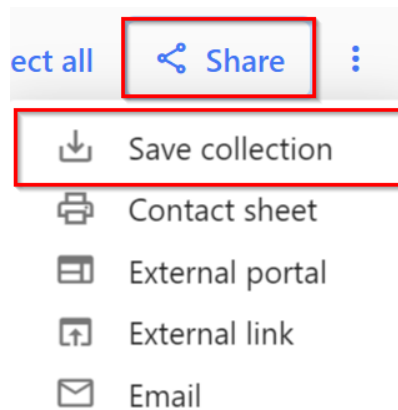
Selection Bar

22.07 Selection Bar

The Selection bar has a few changes compared to 22.03. Along with the selection information and other menu options, the Cart Icon and the Logo are displayed.



- When users make a selection, the Selection bar supersedes the Menu bar.
- Options such as Save Collection, External Portal, External Link, Contact Sheet, and E-mail can be accessed via the Share menu in Selection Bar (when one or multiple assets are selected).



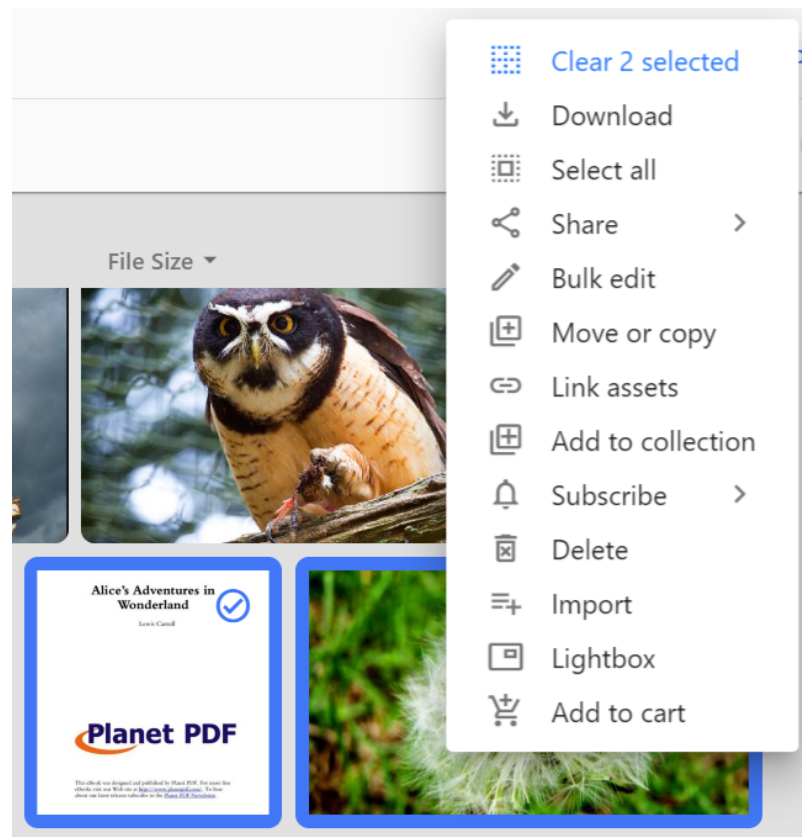
- Users can choose to download their assets as either conversion or original by choosing from the Download command.
- Refer [Selection bar](#) to know more on other Selection menu options.



Note: You may come across old screen-shots on other pages of this guide, we will be updating those shortly.

Contextual Menu

Contextual menu for Multiple Asset Selection:



- **Clear selected assets:** In MediaBeacon 22.07, a new button for clearing the selection is added in the contextual menu. Users can directly clear the selection of assets without moving the cursor to the Selection bar.

4. Admin Core

This section covers front-end Administrative functions in MediaBeacon.

What is the Admin Core?

MediaBeacon can be configured on three levels.

1. The Web User Interface, or (Web UI) may be configured by a user with the correct permissions, usually a Global Administrator-level user.
2. The application's installation itself is configured via the MediaBeacon Server GUI Application Manual.
3. The Admin Core.

The Admin Core interface is itself a secondary, internal MediaBeacon which uses the metadata of specialized data-only assets to define system parameters of Users, Groups, Fields, Forms, and Loading Dock Types. Each of these areas of system configuration has its own Workspace.

Nomenclature

For clarity's sake, this section will use the following terminology to differentiate between some similarly named concepts:

Because the Admin Core itself is an instance of MediaBeacon, there can be some confusion of nomenclature. In this section, we will use the following terms to differentiate similarly named points of configuration

- **Web UI:** MediaBeacon for non-admin users. Admins may configure Workspaces and Components here.
- **Admin Core:** Allows Admins to configure the parameters of Users, Groups / ACLs, Fields, Forms, and Loading Dock Types.
- **Assets**
 - **DAM Asset:** An asset that is managed by the Web UI.
 - **Configuration Asset:** An asset managed by the Admin Core that defines parameters of Web UI behavior
- **Fields**
 - **XMP fields:** refers to the fields that are used to store data about assets uploaded by users in the Web UI.
 - **Property fields:** The fields that define the parameters of configuration assets. Also refers to fields presented in workspace or component configuration.
 - **Form fields:** XMP fields displayed in a Form.
 - **Configuration value:** The values entered into property fields. Often the names of various other configuration assets will be used as values in property fields.

Admin Core Database

MediaBeacon requires two databases to function properly, one for the Web UI part of MediaBeacon, and one for the Admin core. The Web UI database can have any name, but the Admin Core database

must be have the string "_admin" postpended to the Web UI name. For example "mediabeacon" and "mediabeacon_admin".

See the Database Users section in the MediaBeacon Server GUI Application section for more info.

4.1. Admin Core Interface Overview

Using the Admin Core

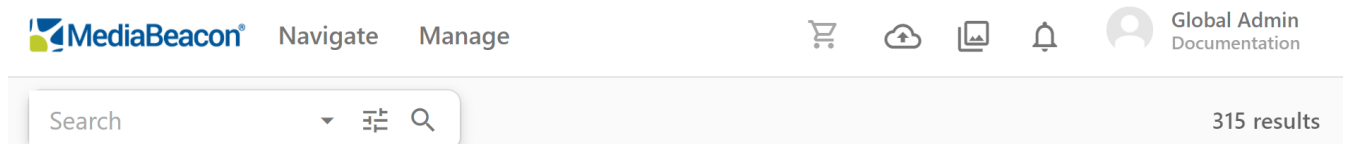
The Admin Core is only accessible to Global Administrator-level users. Once such a user is logged in, they can access the admin core via the Menubar > Manage > System command.

Workspace Structure

The interface of the Admin Core is much the same as the Web UI, but tailored to a subset of functions: creating assets, editing metadata, Quick Search, Filter Searching and the List view. The following are interface elements shared across all workspaces of the Admin Core.

Menubar Functions

Many of the menus here have reduced and contextual functionality compared to the normal Web UI.



- **MediaBeacon Logo:** Clears all search criteria unless it is configured. For example, it may redirect to another workspace or perform another arbitrary function. Refer [Brand Portal configuration points](#).
- **"Left Arrow" Icon:** Returns to the user to the Web UI.
- **Navigate:** Changes to any of the preset workspaces in the Admin Core.
- **Manage:** Shows the Administrator Menu Commands.
- **Cart Component:** Displays the items added to cart.
- **Upload:** Uploads files via selection or drag and drop.
- **Load Collection:** Loads the added Save Collections.
- **Notification Center:** Displays the different kinds of notifications.
- **Username:** Name of the current user.
- **Help Icon:** Redirects the user to MediaBeacon University, MediaBeacon's online documentation.
- **Quick Search / Search Status components:** Functions as normal. Refer [Quick Search](#)

Search, Filter and View Assets

On each workspace, the view of configuration assets is restricted to just those pertaining to that workspace. Users can further search for configuration assets using Quick Search, and/or the Filter Search.

The List view on the right, displays results of search and filter functions. The total number of results is displayed on the right side of the search status.

Filters at the top of the List view may be used to further filter or sort results.

Filter Search Fields:

- User Workspace
 - Username
 - User Type
 - Primary Group
 - Group Membership
 - Position
 - Active
 - State / Region (Not present in versions above 20.2)
- Groups Workspace
 - Name
 - Users
 - Default ACL
 - Default Language
 - Edit Level
 - View Level
 - Loading Dock Type
 - Visible Forms
 - Permission Restrictions
- Fields Workspace
 - Name
 - Schema
 - Type Validator
 - UI Element
 - Edit Level
 - View Level
 - Index in R3Search
 - Index in SQL
 - Synchronization Strategy
 - Locale Sorting
 - Enable Substring Search
 - Dictionary (not present in the versions below 20.2)
- Forms Workspace
 - Name

- Display Name
- Class
- Field
- Loading Dock Types Workspace
 - Name
 - Platform
 - Image Format
 - Video Format

Create and Edit Dialogs

The Admin Core does not use the Asset View as the Web UI does, instead each workspace will display a dialog tailored to the creation and editing of that type of configuration asset.

These dialogs are unlike regular Forms in that they have some dynamic fields, that is, some options may reveal other configuration fields.

Also, saving behavior is different. All changes must be saved using the lower right-hand button (the label changes, Create/Update Asset Type).

4.2. Users Workspace

Configuring user accounts and invitations in MediaBeacon.

4.2.1. User Account


User Account Overview

User accounts in MediaBeacon control the user's ability to log into the system, define broadly their level of capability, but rely upon other configurations (Groups, ACLs) to control the fine details of user permission.

User Account Workspace List View

Administrators can customize the headers displayed above the User Account Workspace list of users. This can be used to sort and filter results.

The Options dialog to configure each View Component's list of headers is displayed by clicking the

Options icon,  shown to the left of Username.

- **Select a field:** To add a field as a Header, click Select a field and choose from the drop-down.
- **Fields to Display:** This area displays currently added fields and their arrangement, top-down corresponding to left-right, and allows each header to be configured.
- **Setting Filter Header Order:** Fields can be rearranged by placing the cursor to the left of the field name.

- When the hand cursor changes to a moving cursor then, drag the field to the desired place.
- **Removing headers:** To remove a header, click the "X" button to the right of a field name.
- **Apply Sort Order:** This section of the user properties enables a default sort order to be set for the users list. After enabling the default sort order for a particular field, select Apply sort order and choose the field from the Order by list drop-down.



Note: Username is always the first field in the list. This is a mandatory field that cannot be removed



Important: Always refresh after making any changes.

When a field is selected from the list of fields, a warning "**Adding this field will slow down the page rendering. Please index the field in order to improve performance.**" pops up. Select **Hide this message in future** to stop displaying the warning again

Last Login Date

Displays the login date of all the users. The Last Login Date field can be used to find the login date of all the users of MediaBeacon. Administrators can use this field to sort all the inactive users.

Known Limitation

For MediaBeacon 23.07 the filter terms of login date are limited to **Older than 2022**.

User Account Asset Metadata

- **Username:** The string that the user enters to authenticate.
- **Password:** The password that the user enters to authenticate.
 - Passwords in local accounts do not have length or character restrictions by default.
- **Active:** When selected, this option makes the account active, that is, able to log in.
- **Change password on next login:** When enabled, the user, once authenticated, should choose a new password which is different from the initial password. This is useful if an admin is asked to manually reset a password, making the password given to a user a one-time password. Once the password is changed, this option is disabled.
 - Note: Both the Active and the Change password checkboxes can be checked concurrently.
- **User Type:** One of three user types may be chosen here, General User (most users), Group Administrators (seldom used) and Global Administrator (configuring users). See the User Type section below for more information on these types.
- **User Notes:** This field is used to add comments for the user configuration changes made in the MediaBeacon user workspace.
- **Primary Group:** This field is an artifact of legacy systems, and the group listed here has no special function or bearing on the account. There are a few quirks about how it is used in the Create / Edit dialog:
 - It is a required value, and the value here is automatically added to the list of groups in Group Membership.
 - When a user is created, it is auto-populated with the "users" group. This is usually not desirable. See the [Groups Workspace](#) on page 25 section for more information.

- The best practise to use when populating a user:
 - Single group: the group to which the user belongs is in Primary Group and Group Membership fields.
 - Multiple groups: All groups will be in Group Membership, but one of them (it does not matter which) must be in Primary Membership.
- **Group Membership:** This multi-value field defines the list of groups to which the user has access. It is a dynamic dictionary field, only allowing currently existing groups to be added.
 - The group entered into Primary Group are automatically entered into Group Membership.
 - This is bidirectional with group's Users field. When a group is added to or removed from this field, this username is added or removed from that group's Users field.
 - **Loading Dock Type:** Assign the loading dock type for
- **User Account Contact Fields:** These fields have limited functionality within MediaBeacon, and do not need to be entered for an account to be valid.
 - **First Name:** If filled, the string here is displayed in place of the username field when the user is logged in.
 - **Last Name:** If filled, the string here is displayed in place of the username field when the user is logged in.
 - **Company**
 - **Department**
 - **Position**
 - **Address Line 1**
 - **Address Line 2**
 - **City**
 - **State/Region**
 - **Zip Code**
 - **Country**
 - **Phone Number**
 - **Phone Extension**
 - **Email:** This field must be filled out, otherwise the system cannot send email to them.
- **Update and Send Email Notifications:** This function allows to save all the updates in the user workspace and send an email notification to the user.
- **Content Pools:** This function extends per-user information and metadata search capabilities. See the Content Pools article for more information.

Local vs IdP Users

Local vs IdP Users

User Accounts can be thought of in two major categories. One, local accounts, which are created and managed by the MediaBeacon system itself, and identity provider (IdP) accounts, those controlled by an identity provider that MediaBeacon is configured to use. MediaBeacon integrates with an array of identity providers. See the Enterprise Tab section for more information.

Local Accounts

This article refers to local account functionality in general, and IdP accounts as noted.

IdP Accounts

This section will list those areas where IdP accounts differ from local accounts

- **Username and Password:** Controlled by the IdP and are not editable.
- **User Account Contact Fields:** Controlled by the IdP and are not editable.
- **Active Setting:** An IdP account can be prevented from logging in when its Active option is disabled. The user authenticates as normal via the IdP, but no access is granted to this account.
- **Primary Groups and Group Membership:** These fields in an user account are generally controlled by the IdP and are not editable. Configuration options do exist to change this behavior, allowing the IdP to initially populate these fields, with MediaBeacon allowed to make changes

User Type (User Levels)

- **General User:** This type of user has no access to configure the Admin Core, and is granted the ability to configure parts of the Web UI in only very exceptional circumstances. Most users of the system will be this type.
- **Global Administrator:** This type of user has the most power to edit configuration in the system, always having access to the Admin Core, and to Admin Mode. Some group/ACL permission restrictions can limit the abilities of global admin, so it is worthwhile to ensure there is at least one fully unrestricted group set aside for this purpose.
- **Group Administrator:** The group administrator capabilities fall somewhere between the General User and the Global Administrator.
 - Cannot use Admin Mode.
 - Full access to Admin Core.
 - For this reason, this user type is not often used. Typically, intermediately permissioned users will be of the General User type, and given access to groups that allow more capability than most other users.

User Invitations

MediaBeacon's invitation system is a way to quickly on board a number of local users with a minimum of Global Admin effort. An invitation creates an email, link, or activation code that gives a users a self-service method of account creation. One notable difference between invitations and normal user accounts is that invitations are not stored as XMP assets, and as such have limited edit-ability once created.

Users created by an invitation does not count or counts against the number if users a given license allows. For more information read the license parameters.

Creating an Invitation

Once the **Menubar > Manage > Configuration > Create > Invitation** command, is chosen, the Invitation dialog is shown. It's titled "Activation Code: ".

Create Invitation: 1896576901
 ×

ALERT CALLOUT: This number is both the key for creating accounts, and identifying them for later management so it may be worth copying before filling out the below form.

- **Number of Users:** The maximum number of users that can be created by a given invitation.
- **Email Details:** Sending an email is optional. If so the Activation code or link will need to be copied by hand. It's recommended that global admins send the invitation email to themselves for forwarding even if they are not going to designate recipients initially.
 - **To:** Allows one or more (comma separated) email addresses to receive the invitation email. Unlike other email forms in MediaBeacon, this one does not prefill user accounts / email addresses as it is assumed the recipients are not already in the system.
 - **Subject:** Standard email functionality.
 - **Body:** Standard email functionality. Will also contain the link to complete an account activation when sent.

- **Default Group:** The invitation system allows the user to choose one group the users will belong to. If more than one group is needed, this may be added to users via normal editing or bulk edit once they have created their account. This field cannot be left blank.
- **Required Fields:** In addition to a username, the User Account Contact fields may be set to required, for the invited user to supply. It's recommended to include "Email" with every invitation.
- **Create Invites and Send Email** button: The To and Subject lines will need to be filled to send an email properly.
- **Create Invites:** Immediately creates the invitation, displaying the "Email Users" dialog, to remind the admin to send the activation link to users.

ALERT CALLOUT: This is the only time that the link can be copied at this point. Double check it has been completely copied. Clicking "OK" or "X" clears the dialog.

Managing Invitations

Once created, an invitation's status can be reviewed by clicking the **Menubar > Configuration > Manage > Invitations** command, opening the Invitation User Summary dialog

- **Invitation Name:** Unique Identifier for each invitation.
- **Activation Code:** The code as seen in the "Activation Code" dialog. This is the easiest cross reference to each invitation.
- **Invited Users:** Number of users initially invited.
- **Remaining Users:** Remaining users for the given.
- **"X" (Delete)** button: This will delete the invitation.

Using an Invitation

Via Link

When the user follows an activation link, the user is redirected to the MediaBeacon site:

1. The Create Account dialog is displayed.
2. The user enters required fields and clicks "Create".
3. If the account is successfully created, the "Success" dialog is displayed, the user then clicks "Close" to return to the MediaBeacon login screen.

Via Activation Code

The activation code from an invitation may also be used to create accounts to be used, but the "Create Account" link option must be enabled in the Log In component on the Log in workspace. For more information on how to enable this function.

To use, the user clicks the **Create Account** link, displaying the **Enter Activation Code** dialog.

1. The user enters the activation code, and clicks "Create". If the activation code is valid, the steps of account creation above in **Via Link** are followed.

INFO CALLOUT: The activation may also be postponed to the following string to make an activation link: "<http://externaltraining2.mediabeacon...tMain.html#!CU>"

4.2.2. User Types

User Types are the different kinds of users who can access MediaBeacon.

There are three types of users.

- **Global Administrator:** User with full control over MediaBeacon. Global Administrator configures other users.
- **Group Administrator:** User with access less than administrator but more than General Users. Their control will be limited to the group they are part of.
- **General user:** User with access to the basic functionalities. General users do not have access to set up configuration.

Users access to MediaBeacon depends on the User type they are assigned by the Global Administrator.

Administrator Menu Commands

Each User Types have different access to Administrator Menu Commands.

Figure 3: Global Administrator

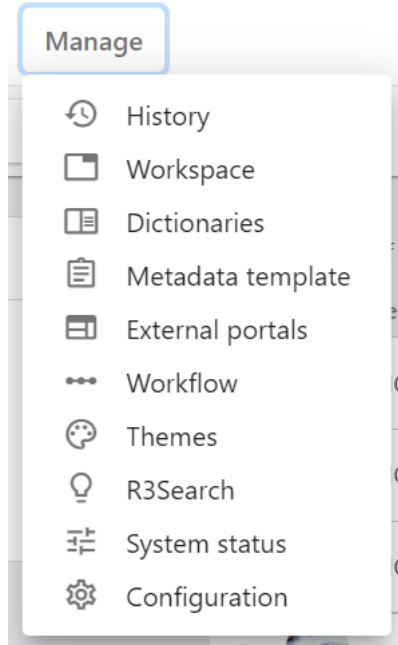


Figure 4: Group Administrator

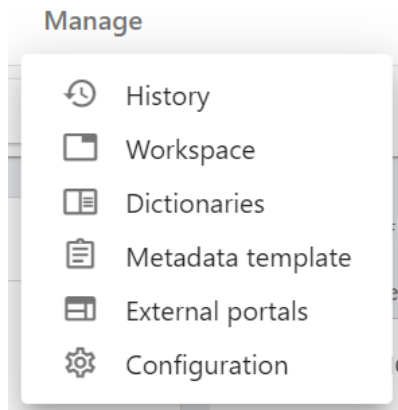
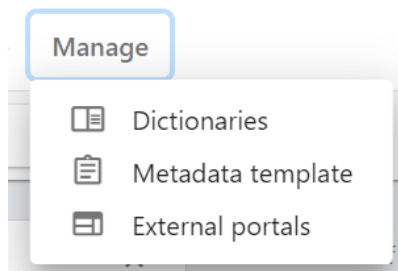


Figure 5: General User



Below table shows the basic functionalities and the corresponding access for the User Types.

Permissions	Global Administrator	Group Administrator	General User
Login	Yes	Yes	Yes
Create and modify assets	Yes	Yes	Yes
Search Assets	Yes	Yes	Yes
Download Assets	Yes	Yes	Yes
Create Collections	Yes	Yes	Yes
Share Assets	Yes	Yes	Yes
Create External Portal	Yes	Yes	Yes
Edit all Components	Yes	Yes	
Admin Core Access	Yes	Yes	
Create Workspaces	Yes	Yes	
See all groups they're part of in admin core	Yes	Yes	
Edit all groups they're part of in admin core	Yes	Yes	
See all users that are attached to groups they are part of	Yes	Yes	
Manage Workspace	Yes	Yes	
Create Users	Yes		
Create/Edit Groups and ACL	Yes		Edit groups they're part of
Edit/see users	Yes		
Edit/see forms	Yes		
Edit/see fields	Yes		
Edit Conversion types	Yes		
Duplicate users and groups	Yes		
Configure the system	Yes		

4.3. Groups Workspace

Configuring Groups and ACLs in MediaBeacon.

The Groups workspace in the Admin Core allows admins to create and edit groups and ACLs.

Groups Overview

Groups in MediaBeacon are organizational objects that users can be assigned to. Each group can impart specific privileges to users, such as access to certain functionalities, or access to specific assets. Conceptually, MediaBeacon groups are roughly analogous to the groups that an identity provider (IdP) defines.

ACL Overview

MediaBeacon adds an additional layer of configuration for flexibility: the Access Control List or ACL. ACLs control a key set of users' capabilities in the system. ACLs are not inherited from Identity Management systems, being a MediaBeacon-exclusive configuration.

ACL configuration will be covered in the [Configuring ACLs](#) article, but organizationally, they are subordinate to groups. Refer [ACL Configuration](#) on page 29.

Group Asset Metadata

- **Name:** The label used for the current group.
 - The Group name is usually not visible to users, except when sharing a Saved Search or Saved Selection.
- **Hidden?:** Enabling this option hides the group in the Group workspace's List View. When groups are hidden, the Filter Search will display the Hidden facet, and clicking True will show the hidden groups. This setting is often used when an IdP imports a large number of unused groups into the system.
- **LDAP DN:** Although labeled "LDAP", this field inherits the Domain Name that is supplied when importing a group from an IdP.
- **Description:** A text description of the group, only visible in the Admin Core.
- **Login Message:** This field is used to add text to the Login component shown on the login workspace. It has a number of limitations:
 - As this is a group-based property, it will only be displayed after a user logs out from a specific group.
 - A record of what group the user was in when they logged out is stored in a browser cookie.
 - If a user has never logged into MediaBeacon, or has removed browser cookie, this message will not be displayed.
- **Users:** Displays the current members of the group. Users may also be added to a group by adding their usernames here.
 - This is bidirectional with a user's group metadata. When a user is added to or removed from this field, this group will be added or removed from the user's Group Membership field. If the user has only one group (that one group being present in both Primary Group and Group Membership), the "Default" group will be automatically added.
- **Loading Dock Type:** Assign the loading dock type for the group. All ACLs within this group will share this setting. See the [Loading Dock Type] section for more information.
- **Loading Dock Quota:** Set the maximum number of megabytes that a group user's Loading Dock can hold. All ACLs within this group will share this setting. See the [Loading Dock Type] section for more information.

- **Default Language:** Sets the default language the Web UI will use upon initial login. All ACLs within this group will share this setting. See the [Languages] section for more information.
- **Edit Level and View Level:** These settings control what metadata fields can be edited or viewed by users in a given group. The levels range from 0 (lower) to 9 (higher). All ACLs within this group will share this setting.
 - These levels carry no inherently different functions, instead being relative to the corresponding settings defined for each field. If a group's Edit level is 5, all users (using that group at the time) will be able to edit fields at levels 0 through 5. The same goes for the View level, a field is visible to a user if the ratings correspond.
 - Edit Levels are overridden by the Edit Metadata permission restriction. When set, the user cannot write metadata.
 - It is important to remember that the view and edit levels do not *provide* access as much as they *limit* it. These settings are of limited use if the user is not first granted the ability to see a given field via the Visible Forms setting.
 - Below are some examples of caveats with these levels. The examples assume the field edit/view levels are set higher than the user's current group's levels.
 - Fields on a Forms will be non-writable or hidden, respectively.
 - List View columns (defined by fields) will not be hidden by View level. Edit level will prevent writing to these fields.
 - Fields used in the Filter Search will be hidden.
 - A field used in the Taxonomy component is always visible and editable.
- **Priority:** A ranking system of 1-20 (20 being the highest) to determine a user's "login destination", that is, the Group, ACL and workspace the user is automatically directed to upon login.
 - The system also ranks groups differently based upon the Default ACL setting. If this field is blank, that group will always be considered lower priority than any group that has a defined Default ACL. For example, a group with Priority 1 and a Default ACL defined will be the login destination even if that user has access to a group with Priority 20 and no Default ACL.
- **Default ACL:** The ACL to which the user is directed upon login by default if there is more than 1 ACL. This is contingent upon the user's group's Priority setting.
- **ACLs** section: This area lists the ACLs that have been defined for the current group. Click the "Add" button to add an ACL section. See the ACL Metadata article for information on these settings.
- **PDF Title Template:** This section allows the user to set a cover page for PDF files generated by the Contact Sheet functionality.
 - Note that all ACLs in a group will share the same cover page.
 - See the **How to Create a Custom Contact Sheet Cover Page** article for more information.

4.3.1. Managing Groups with an IdP

When using an IdP with MediaBeacon, group management will have some differences.

Upon user authenticates against the IdP:

- A user account configuration asset is created if it does not already exist. The user account configuration asset will then sync metadata the IdP supplies.
- Group configuration assets are created for all groups of which the user is a member, if they do not already exist. Those group's configuration assets will then sync metadata the IdP supplies.

- The metadata synced to groups is limited: "Name" is always present, "LDAP DN" maybe supplied, and any users who have previously authenticated who are part of the IdP group will be listed in the "Users" field. The IdP supplies no other metadata fields or ACLs, so these will need to be added in MediaBeacon.
- Pre-Existing MediaBeacon groups can be synced to an IdP after they have been created. All that is required is to match the names of the MediaBeacon groups to those of the corresponding IdP groups **prior to user authentication**.
- User's membership in groups must be managed in the IdP system.

User / Group Assignment with IdP

In default configuration, MediaBeacon does not have the ability to change the assignment of users to groups, as this is wholly managed via the IdP itself.

Using an optional configuration, MediaBeacon can be allowed to edit user membership of IdP groups.

If an ACL is not configured for a group, the user will be shown a dialog: "Warning, No ACLs available. Please contact your administrator."

4.3.2. Monitoring

The Monitoring user/group is configured to check system performance and health of MediaBeacon instance's various internal sub-services. An alert is issued to our internal teams for further investigation if an anomaly is detected in one of these services.

Monitoring ensures these sub-systems to prevent the users from having a service disruption. By default, this is enabled for all MediaBeacon installations. **Contact Customer Care for more information or support.**

For MediaBeacon 21.03 and before versions, the users can manually create a new user or assign an existing user to monitor the system while setting up.

Note: The users are recommended not to modify these changes.

The Monitoring feature in the MediaBeacon 21.07 and later versions is designed to load automatically.

A separate User account, "Monitoring" will be added by default, in order to authenticate the Monitoring feature.

The new default user belongs to the Monitoring group and has limited access. A random password and the API key are also generated by default.



Note: The password, as well as the associated API key, is unique and is randomly generated when MediaBeacon is installed.

Edit *Monitoring*
✕

Name

Hidden?

LDAP DN

Description

Login Message

Users ✕

Loading Dock Type

Miscellaneous

Default Language



Note:

- The permissions for the Monitoring group are limited to monitoring and other actions are restricted.

4.3.3. ACL Configuration

Configuring Access list in MediaBeacon.

- ACL Metadata is contained in a group configuration asset's metadata, but for the sake of clarity it is described here.

ACL Metadata is in the Data Block metadata structure.

- **Name:** The label of the of the current ACL. Note that general users do not see the names of groups in the ACL menu, only the string designated in this field.
- **Default ACL checkbox:** Enabling this option automatically copies this ACL to the parent group's Default ACL field.
- **Description:** A note area to describe the ACL. This string is only displayed in this field and in the ACL Selection component.

- **Root Path:** This field designates a "root folder" to filter assets available to ACL users. When set, the user of the ACL will only have access to assets that are contained in that folder and subfolders. Can be used in conjunction with the "Filter Search" setting, below.
 - This is noted in the Web UI as "Index/", in the Directory Browser, Move/Copy dialog.
 - "Index" does not always refer to an ACL Root Path. See [The Index Folder] Article for more information.
- **Hide:** When enabled, this setting will prevent this ACL from being listed in the ACL menu or the ACL List in the Places Browser. This may be desirable in the case of an IdP pooling all users into a common group.
- **Icon:** Defines the icon displayed for this ACL in the ACL menu and the ACL Selection component.
- **Workspaces:** This field lists workspaces this ACL can access. The user cannot add workspaces here, but they can be removed.



Note: If a workspace is removed and it is not shared by any other ACL, the workspace is permanently deleted.

Filter Search: This field designates a saved search to filter assets available to ACL users. Similar to the Root Path, this will restrict the user's access. However, instead of the restriction being the contents of a folder, the assets returned by the search are available to users.

- Can be used in conjunction with a Root Folder, as described above.
- The Filter Search dropdown lists all non-private saved searches to be used as an ACLs filter search. Best practice is to create "Admin Searches" for use in ACL configuration. See the [???] section for more information.
- **Upload Form:** This field allows a specific Form to be designated as the default upload Form for all workspaces in that ACL. Note that the Upload Form designated for a workspace or component will override this setting.
- **Javascript on Download:** Client-side Javascript entered here will be executed prior to allowing the download of a file. This option is usually only required for add-on products.
- **Permission Restrictions:** Entries in this field suppress the specific functionalities for users of this ACL. This field is multivalue, and can clear all or add all restrictions with the buttons below it. Please see the [Permissions Restrictions List] article for full detail on specific restrictions.



Note: If a permission restriction is listed in this field, the functionalities associated with it are **disabled** for users of the ACL.

- **Permission Workflows:** This field designates an advanced workflow that can automatically and dynamically set permission restrictions for the ACL.
 - This allows a server side script to be called to check if the permission should be enabled or not. For example, you could have a conditional permission based on metadata or call an external rights management system.
- **Conditional Download:** This field allows a saved search to be used to restrict download of assets based upon metadata.
 - Assets that are the returned by the designated search will be downloadable, all others will still be accessible but cannot be downloaded.
 - The "View Original", "Crop", and "Check Out" commands are also unavailable in this case.

- Best practice is to create "Admin Searches" for use in ACL configuration.
- **Visible Forms:** This field defines what Forms are available in the Bulk Edit or Asset View interfaces.
 - Changed from previous versions of MediaBeacon, newly-created Forms **are not** automatically added to all ACLs. Forms are now "opt-in" within the ACL configuration.
- **GWT JS, GWT CSS, and GWT Body:** Code entered here will be added to all served pages in MediaBeacon.

Editing ACL Settings

As ACLs are metadata contained in a group, ACLs are edited within a group's Create/Edit dialog. Each ACL section no longer has an independent "Save" button, **all changes to all of a group's metadata** is saved when the "Update Group" button is pressed.

Permission Restrictions List

A comprehensive guide to Permission Restriction functionality.

The Permission Restriction field is a multivalued field in each ACL that lists a set of "tags". Each of these defines a set of functionalities that are suppressed by inclusion in this field.

The **Add All** button will add all permission restrictions to the list, and the **Clear** button removes all permission restrictions.



Warning: When a permission restriction is added to an ACL it PREVENTS a user from using a particular functionality.

1. **Add Annotations:** Prevents the user from adding or deleting items in the Discussions Form tab in Asset View. If the View Annotations permission restriction is enabled, the Discussions tab is not visible, preventing the user from adding discussion items, making this permission restriction redundant in that case.
2. **Add Placeholders:** Prevents the user from creating data-only assets. If the File Action permission restriction is enabled, the user will not be able to create placeholder assets, making this permission restriction redundant.
3. **Administer Bundles:** Prevents the user from creating and editing a folder's bundle status. Users will still be able to edit metadata in bundles (even bundle fields) if given access to those fields. This is an **Admin privilege**, and this permission restriction should be enabled for most users.
4. **Administer Dictionaries:** Prevents the user from creating, editing, or deleting dictionaries. This is considered an **Admin privilege**, and this permission restriction should be enabled for most users.



Note: When a user can administer dictionaries, they can do so for all dictionaries in the system.

5. **Allow Download Original:** Prevents the user from using the Download Original function. Users can see other available conversions. This permission restriction becomes redundant when the "Download Hi-res" permission restriction is enabled.



Note: This permission restriction used to be called **Allow Quick Download**.

6. **Approval:** Prevents use of the Approval functionality, if installed.
7. **Change Password:** Prevents users that have local accounts from changing their passwords.



Note: This permission restriction has no function when MediaBeacon is integrated with an IdP (Identity Provider), the "Change Password" button in the Contact Info dialog is not shown in this case.

8. **Check Out:** Prevents the user from using the Check Out functionality.
9. **Check Out Admin:** Prevents Global Administrators from using the "Check In" and "Cancel Check Out" commands and downloading checked out assets.
10. **Contact Sheet:** Prevents the user from creating contact sheets.
11. **Create Metadata Template:** Prevents users from being able to create and edit Metadata Templates. This does not prevent the use of metadata templates that are shared with a user or group that is using this permission restriction.
12. **Custom Download:** Prevents the display of the "Custom" tab in the Conversions dialog. If the Download Hi-Res permission restriction is enabled, the user will not be able to use Custom Download, making this permission restriction redundant in that case.
13. **Delete Access:** Prevents the user from using the Delete command. This permission restriction becomes redundant when the "File Action" permission restriction is enabled.
14. **Download Hi-Res:** Prevents the user from downloading non-converted (original) files. This is somewhat confusing considering the "Download Original" function, but it is distinct. In addition
 - a. Prevents use of the Download Original function.
 - b. Prevents use of the Custom Download tab.
 - c. Prevents use of the View Original command.
 - d. Prevents the use of download links in the Video Originals form.
 - e. Prevents attaching assets to email.
 - f. This permission restriction makes redundant the following permission restrictions:
 - a. Allow Download Original
 - b. Custom Download
15. **Edit Metadata:** Prevents the user from editing any metadata. This permission restriction ignores field and group Edit Level settings. Note the following caveats:
 - a. Non-directly editable metadata will still be changed if the user performs other actions, such as uploading a new file. MediaBeacon will add any metadata that is included in the file, as well as metadata such as file size and Modification Time.
 - b. Does not recapitulate the Change Password permission restriction.
16. **Enable Contextual Menus:** Prevents the user from accessing contextual menus. Note that a Global Administrator user will always be able to access the Admin Mode via a contextual menu.
 - a. When this permission restriction is used, the following commands will be unavailable. Commands that may be accessed elsewhere in the interface are noted with those locations.
 - a. Open in New Tab
 - b. Copy Link
 - c. Download (alternate UI: "Download" in the Selection Bar)
 - d. Selection: This selection is itself not present, but submenu items are present in the Selection Bar itself, or within the Selection Bar's Vertical Ellipses (#) menu or Share menu.
 - e. Add to Cart: Present in the Vertical Ellipses (#) menu of the Selection Bar
 - f. Find Similar Assets: This is present as an icon on the asset itself or within the asset's Vertical Ellipses (#) menu (when asset is part of search results)

- g. Pinpoint Text: This is present as an icon on the asset itself or within the asset's Vertical Ellipses (#) menu (when asset is part of search results)
 - h. View Original
 - i. Subscribe
 - j. External Link
 - k. Present in the Selection Bar's Share menu.
 - l. History
 - m. Present in the Menubar > Manage menu, Check Out, Check In, Cancel Check Out
 - n. New Version
 - o. Views
 - p. Load Workspace
 - q. Load Component
- 17. External Brand Portal:** Prevents the ability to create and manage External Portals.
- 18. File Action:** Prevents the use of the Move, Copy or Delete commands. Also prevents renaming assets, creating data-only (placeholder) assets, and hides the Create Menu.
- a. This permission restriction makes redundant the following permission restrictions.
 - a. Add Placeholder
 - b. Delete Access
 - c. Rename Asset
- 19. File Upload:** Prevents the user from uploading new assets to MediaBeacon. This does not restrict the Import, Replace, Check Out, or New Version functions.
- 20. Folder Action:** Prevents the user from using several commands in the Contextual Menus of the Directory Search and the Places Browser's Directory places
- a. New
 - b. Rename
 - c. Delete
 - d. Move/Copy
 - e. Duplicate Folder
- 21. Generate External Links:** Prevents the user from using the External Links command in either the Create or folder contextual menus.
- Note that this function may or may not be considered an Admin function, and as it allows access to assets without login or authentication, care should be given in determining which users can use External Links.
- 22. Import Assets:** Prevents users from using the Import command on assets or folders. This is considered an Admin privilege, and this permission restriction should be enabled for most users.
- 23. Link Assets:** Prevents the use of the Link Assets functionality.
- a. Note that this is a wholly different function from External Links.
- 24. Notifications:** Prevents the users from subscribing to the assets.
- 25. Rename Assets:** Prevents the user from renaming assets. This permission is redundant when the File Action permission restriction is enabled.
- 26. Send E-mail:** Prevents the use of email-related functions.
- 27. Thumbnail Deletion:** Prevents the users of an ACL from removing icons in the icon picker ("Pick a photo") dialog. For General Users, this is limited to the picker in the "Contact Information" dialog.



Note: For Global Administrators, this setting would prevent removal of icons in the picker dialog when configuring workspaces or components within an ACL that has this permission restriction, but not within the Admin Core.

28. Trigger Workflow: Prevents a user's actions from triggering custom workflows. Visual Workflows (VWFE) and Advanced Workflows require this privilege to be unrestricted to operate in a given ACL. The Adobe® Connector is prevented from being usable in an ACL when this permission restriction is used.

29. Upload Anywhere: Prevents uploading to any directory other than the standard directory.

30. Version: Prevents the use of the Versions functionality. This permission restriction has no bearing on the Check Out functionality, which also creates versions in MediaBeacon. Bulk Versioning can also be restricted using Version permission restriction.

31. View Annotations: Prevents display of the Discussions Form tab. When this permission restriction is enabled, the Add Annotations permission restriction becomes redundant.



Note: The Global Administrator users may always use this function, regardless of setting.

32. View Global Asset Log: Prevents users from accessing the History command.

Deprecated Permission Restrictions

- Archive / Restore
- Content Pools Filter
- Desktop Drag and Drop
- Replace
- RSS
- Thumbnail Deletion
- Video Original



Note: The functionalities of these Permission Restrictions are deprecated.

Permission Restrictions That Make Another Restriction Redundant

Permission restriction	Redundant restriction
View Annotation	Add Annotation
File Action	Add Placeholders
File Action	Delete Access
File Action	Rename Asset
Download Hi-res	Allow Download Original
Download Hi-res	Custom Download

Renaming Downloads

The administrator can enable renaming assets to any of the field names when a download has been made.

For example, if users need to track the downloaded assets using their File size or Date, Rename On Download can be set to File size or Date.

This feature can be restricted to a certain Group/ACL.

The administrator should edit a group's metadata enabling **Rename On Download**.

1. Navigate to Manage > Configuration > Groups
2. For already existing groups, click on the name of the group. While creating a new group, click on Create > New
3. Go to ACLs > Rename On Download
4. Select a field from the list in Fields To Use

Create New Group
✕

Conditional Download

Visible Forms

Rename On Download

Add All
Clear All
Clear Invalid

▼ Fields To Use

Select a field

Add

Create

Edit Documentation
✕

Rename On Download


Add All
Clear All
Clear Invalid

▼ Fields To Use

Select a field

Add

Update Group



Note: For the above example, if there are no keywords in this certain ACL, users can add another field. While downloading, the assets will be renamed to either of the selected fields.

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Note: Assets shared via External Portal automatically renames to the field selected, if Rename On Download feature is enabled.

4.3.4. Contact Sheet Cover Page

How to Create a Custom Contact Sheet Cover Page

Administrators can define a custom contact sheet cover page on a per-group basis. In the example below (the default cover page in MediaBeacon 2018.X and 2019.X), only the text strings "Title Field" and "Description Field" are dynamic. These are designated per contact sheet created in the Create Contact Sheet dialog.

- The file used as a cover page is a single-page PDF.
- If inheriting the Title and Description strings is desired, the PDF file must include specifically-named form field elements.
- The only way MediaBeacon effects the design of this page is to supply the values (strings) of the Title and Description field.



Example Contact Sheet

Example Group

Title:

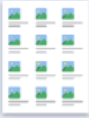
Title Field

Description:

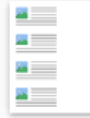
Description Field

← Create Contact Sheet

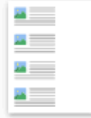
Type



Summary
Create a thumbnail summary of your selection with selected fields.



Schema
Create a thumbnail catalog of your selection including all available fields from a schema.



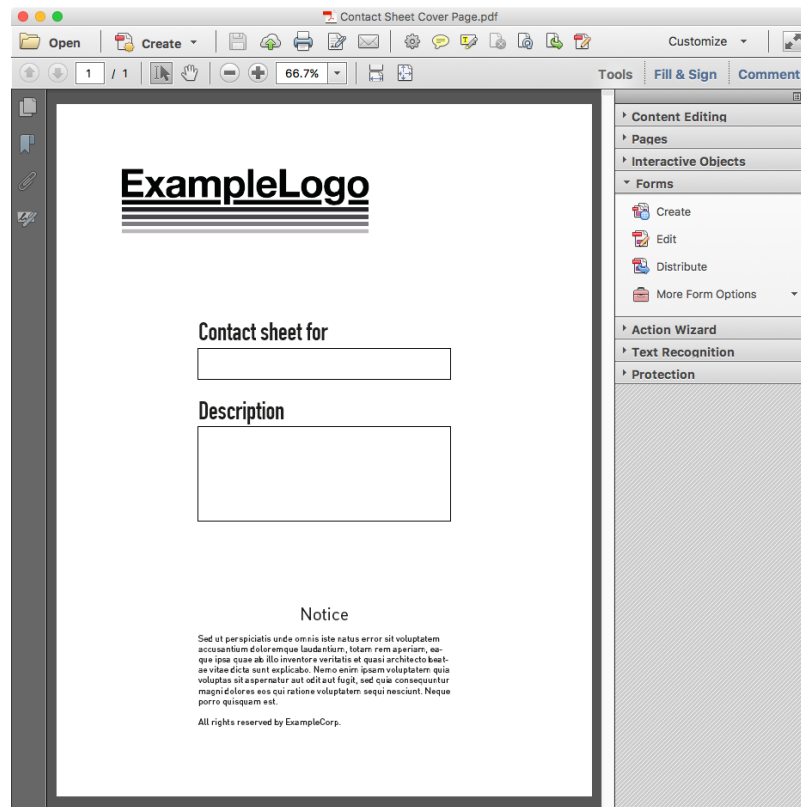
Detail
Create a thumbnail catalog of your selection including all available fields from the database.

Title

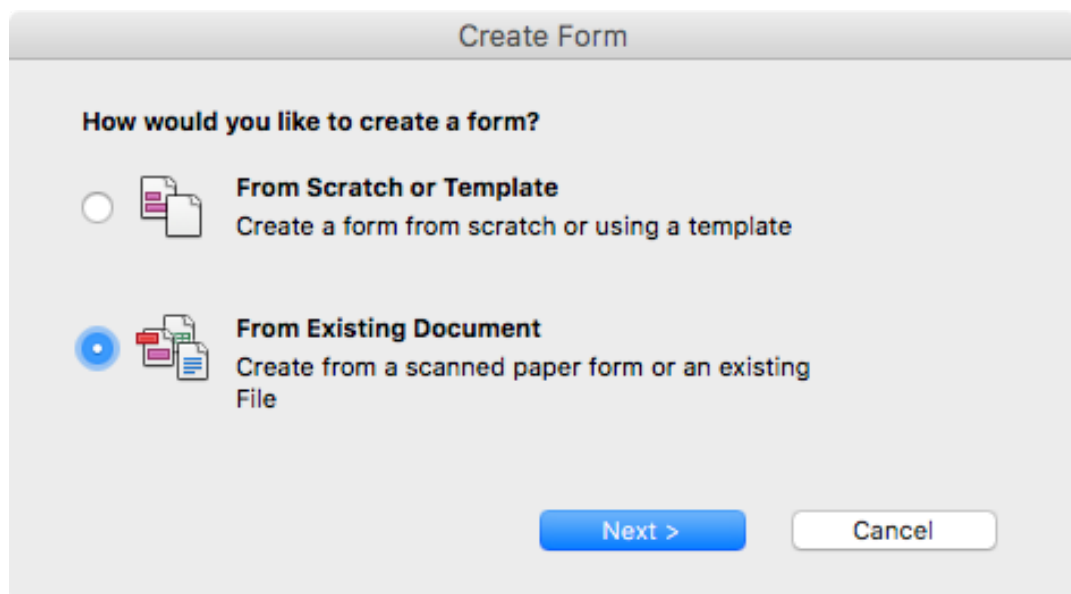
Description

Creating a Contact Sheet Cover Page

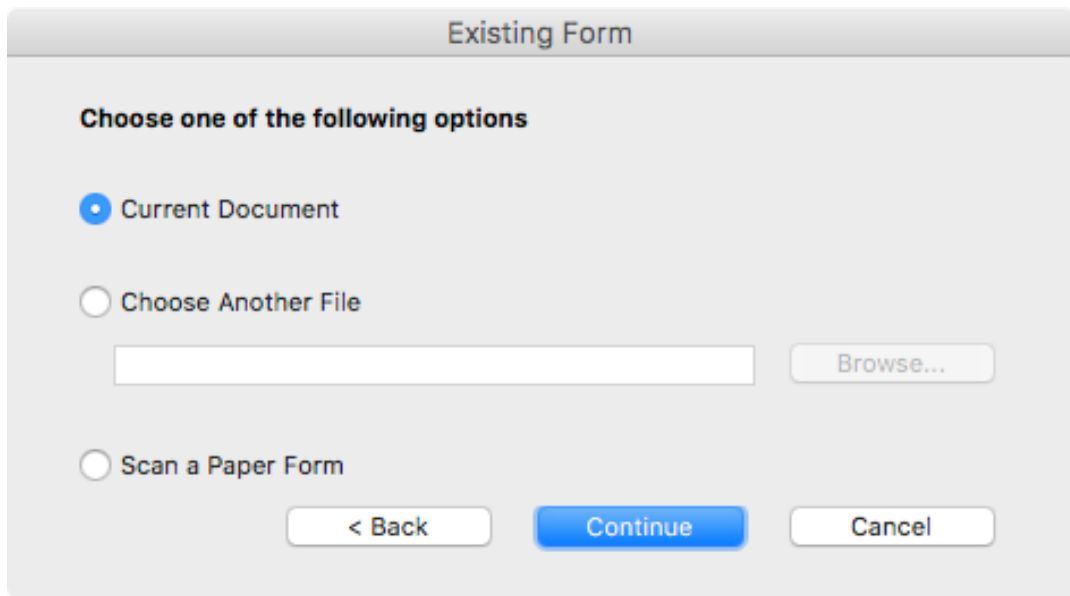
1. Create a design.
 - a. A tool like Adobe® InDesign works well for this, as it can natively create PDF files, but any PDF is a valid source. Please note that the fields that will be filled in are not designated at this time, this is done later with Acrobat Pro's form field functionality.
 - b. It is recommended to create a cover page in standard Letter size (8.5" x 11").
 - c. Save a PDF of your design.
2. Open that PDF in Adobe® Acrobat Pro.
 - a. Any version of Acrobat able to create and edit form fields can be used. This guide shows Acrobat XI Pro, 11.0.23.
3. Go to View > Tools > Forms.
4. The window will go into Form Editing Mode.



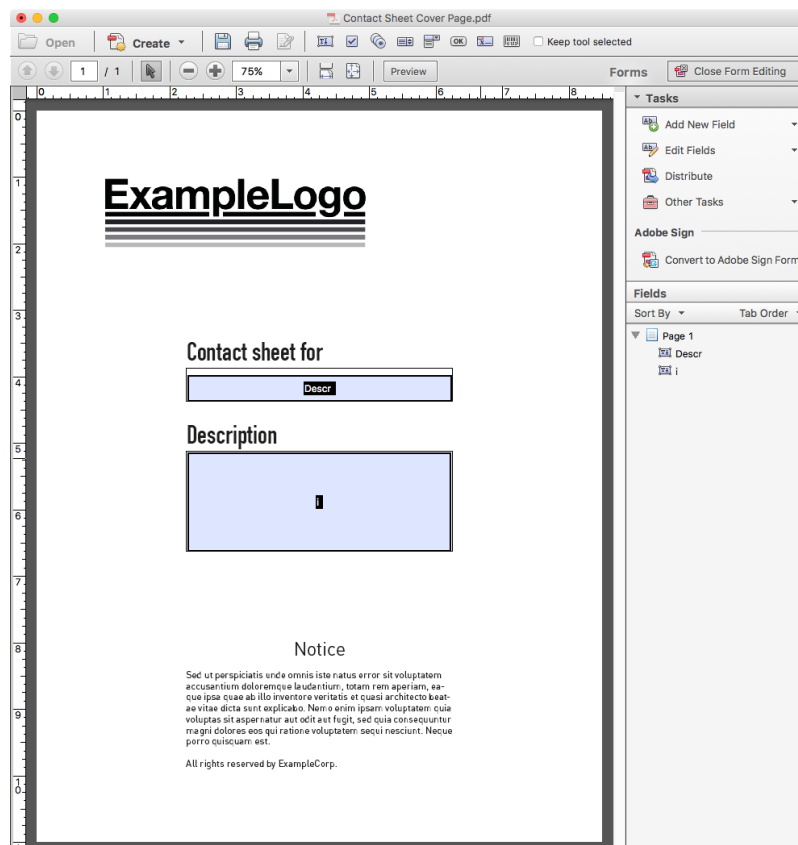
5. Choose "Create", and the "Create Form" dialog will be displayed. Choose "From Existing Document", and press "Next >".



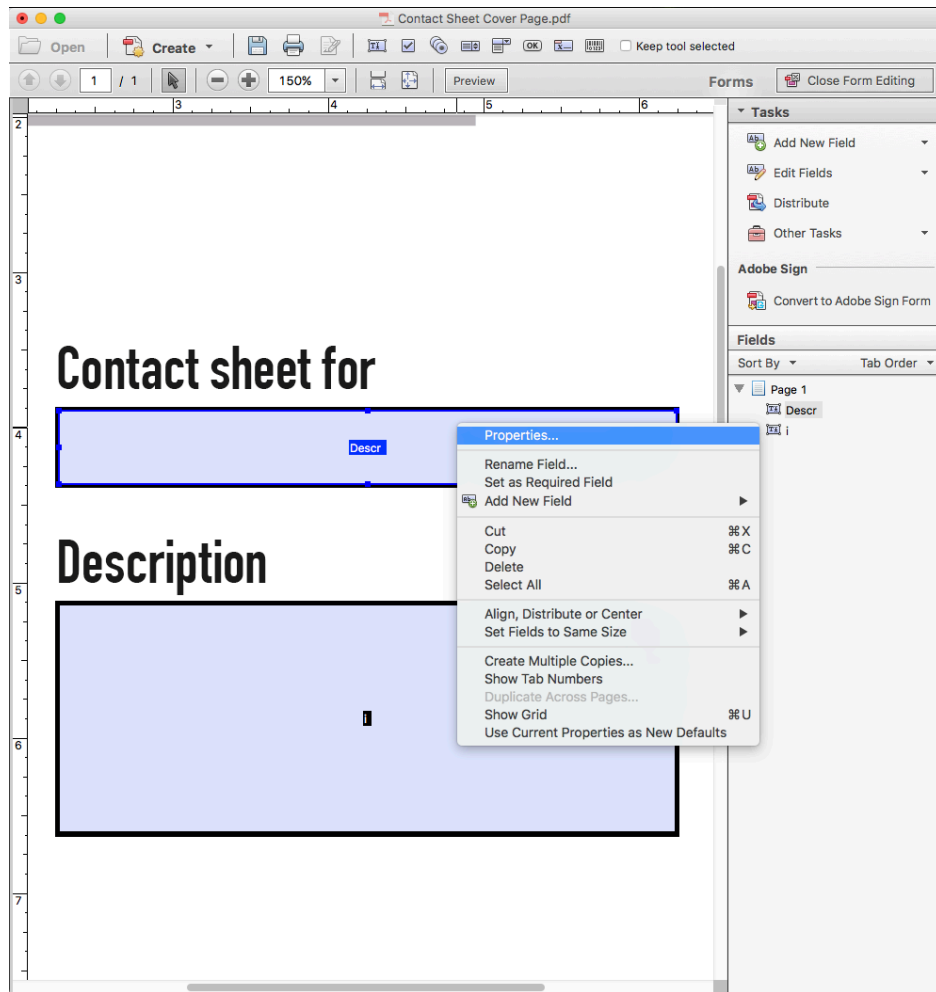
6. The "Existing Form" dialog is displayed. Click "Current Document" and then "Continue".



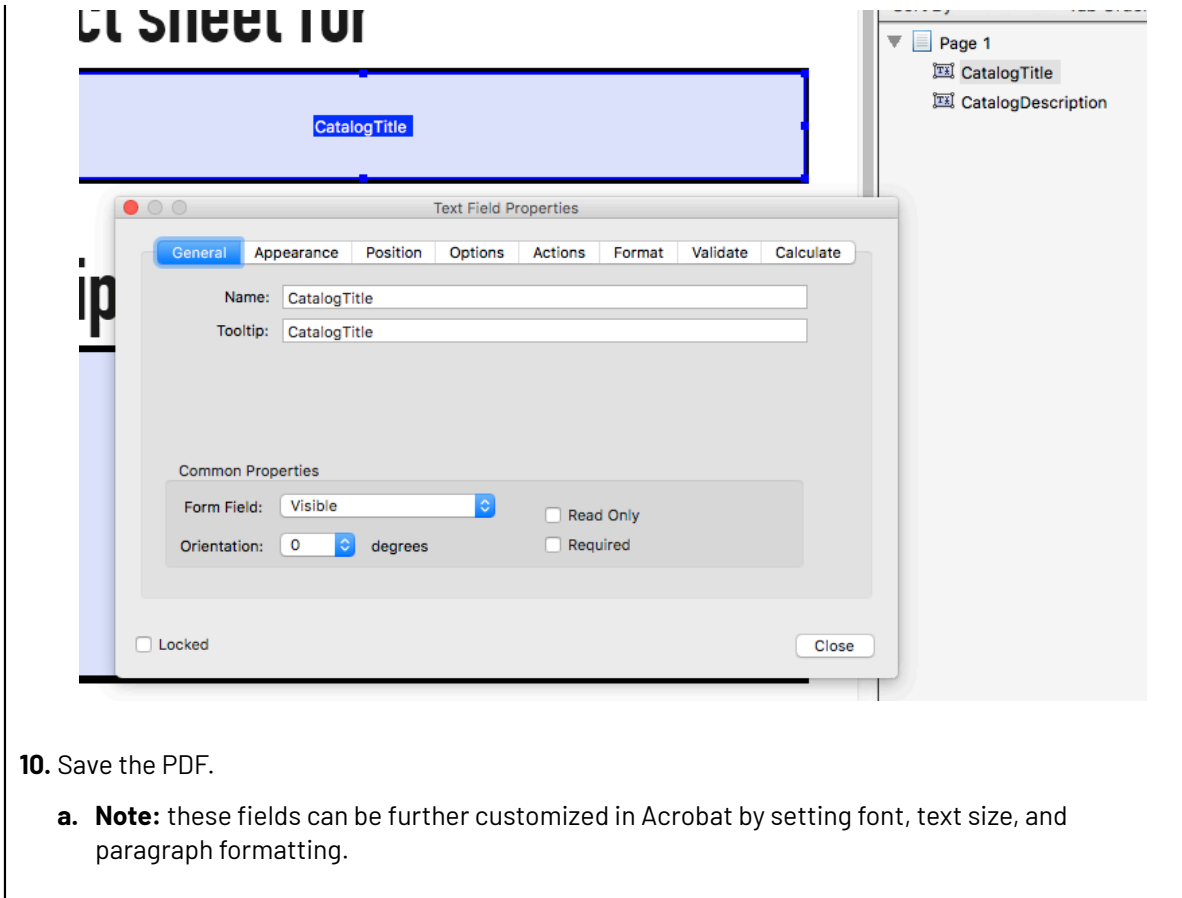
7. If there are any empty frames (as in the example) Acrobat will attempt to create form fields. This is an OCR- like process by Acrobat and not always exact, so some hand-adjustment is required.



8. Adjust the of the size and placement of these fields to align to the frame edges. Then, right-click a field to edit its properties.



9. In this dialog, designate one field "CatalogTitle" and the other "CatalogDescription". The Name and Tooltip do not need to match, but it's best practice to have them match or to leave the tooltip blank. See the Appendix for more from field properties.



10. Save the PDF.

a. Note: these fields can be further customized in Acrobat by setting font, text size, and paragraph formatting.

Configuring a Contact Sheet Cover Page

Contact sheet cover pages are assigned on the Group level in MediaBeacon. Note that there are configuration differences between 2018.x and 2019.x.

MediaBeacon 2019.X Configuration

1. Log into MediaBeacon as a Global Administrator user, and go to "Manage > System", then to "Navigate > Groups."
2. Double-click the icon of the group you wish to edit. In the Edit Group dialog, next to "PDF Title Template" (an older name for the contact sheet cover page) click the "Upload" button and choose the PDF from above, and click the next "Upload" button.

Edit Group ✕

Name

Hidden?

LDAP DN

Description

Login Message

Users ✕

Loading Dock Type

Loading Dock Quota

Miscellaneous

Default Language

Edit Level

View Level

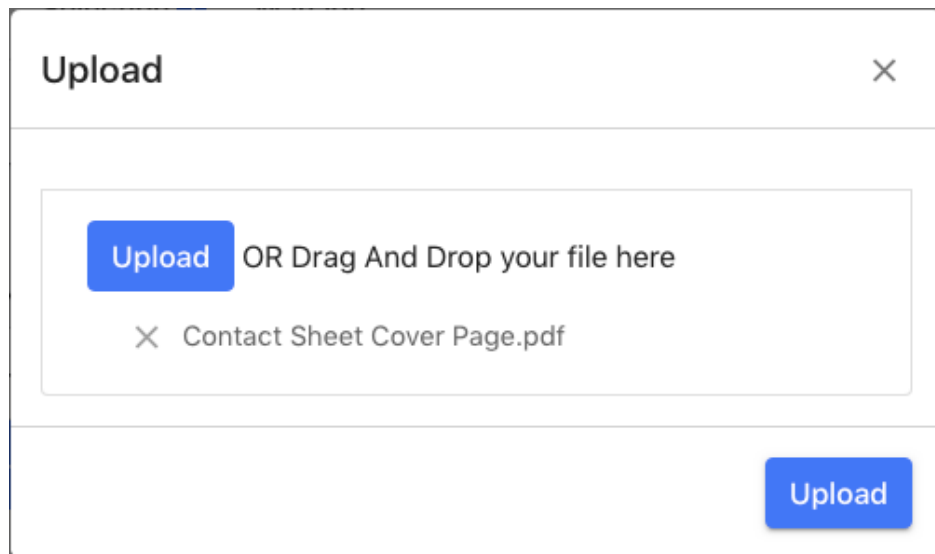
Priority

Default ACL

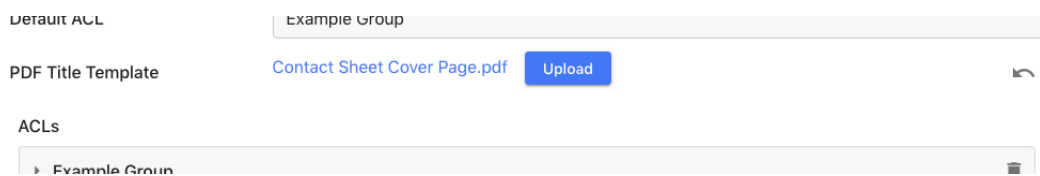
PDF Title Template ↶

ACLs

▶ Example Group 🗑



3. If necessary, the custom PDF may be cleared with the revert button to the right of the Upload button.



4. Click "Update Group", and leave the Admin Core.
5. Once all users who are members of the group have logged out and back in again, the new cover page will be used for Contact Sheets.

MediaBeacon 2018.X Configuration

This version of MediaBeacon does not have a UI-based approach. In 2018.x, a custom contact sheet cover page can be defined as a group specific cover page or as a fallback.

1. Set system property. This defines the "template location" folder, within which the system will look for cover pages. The folder specified is the recommended location, and is relative to <Shared Files Directory>/m-userinfo/

```
mb.pdf.template.location="/m-templates/pdf/"
```

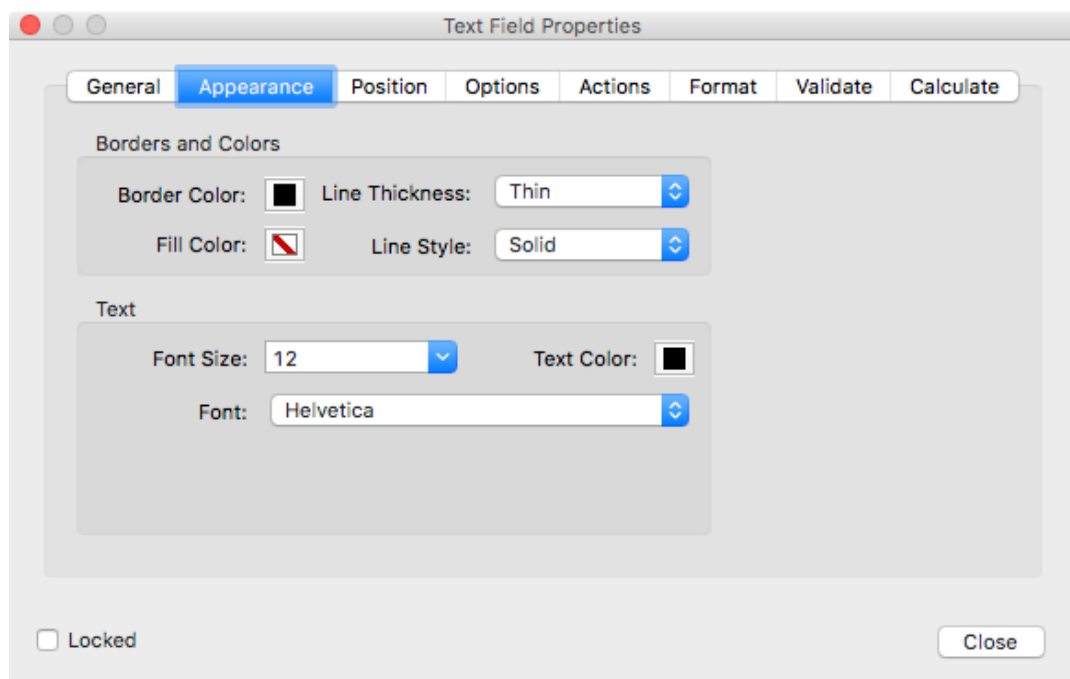
2. After this property is set, MediaBeacon must be restarted.
3. Name Cover Page Files.
 - a. The names of PDFs residing in the "template location" directory affect their function. No restart of MediaBeacon is required when new cover pages PDF files are added or changed in this directory, as MediaBeacon checks this directory each time a catalog is made.
 - b. Default (Fallback) Cover Page: This will be used when a group has no specific pdf specified.
 - a. pdfCoverpage.pdf

- c.** Group-specific Cover Page: This will be used for a given group, replacing the string "groupname", without the "<>".
- a.** `<groupname>.template.pdf`

Appendix

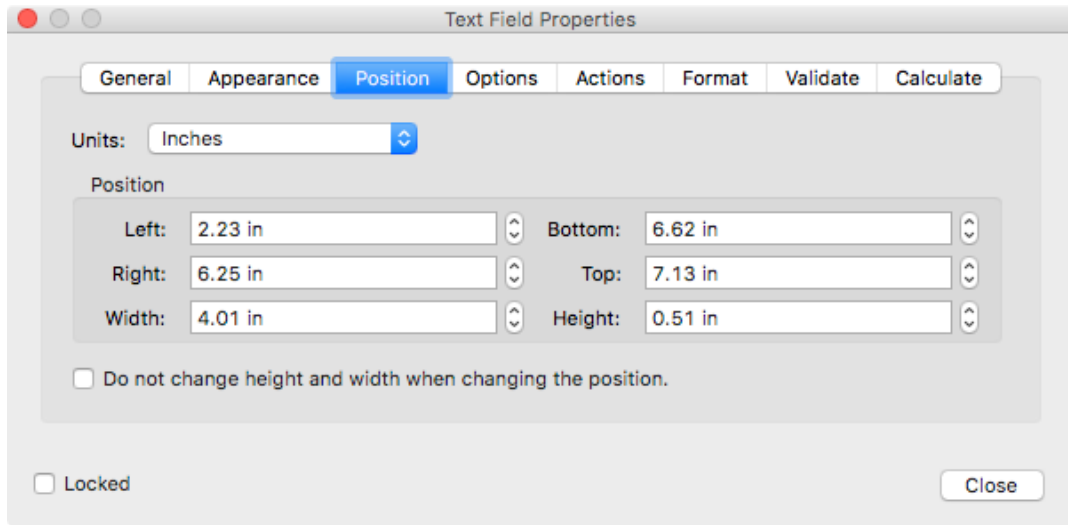
Text Field Properties in Acrobat Pro

Appearance Tab



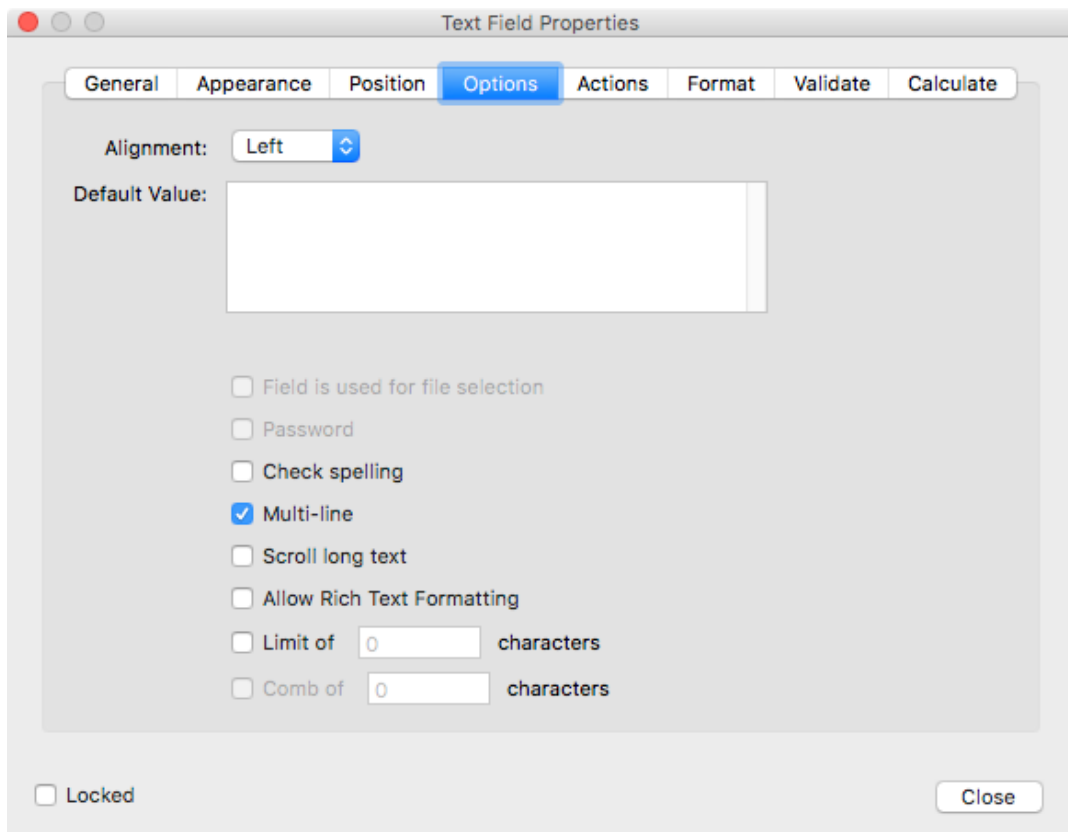
- Borders: If your design did not start with boxes as graphic elements, you can add a border to text frames directly.
- The "Font Size" property may be set to "Auto". If this is set, the text this box inherits will scale in size to fit the box. If this is not desirable, set the Font Size to a static value.
- Font may be set here to provide a consistent look in your forms. It is not recommended to use custom fonts that are not likely to be on the user's system.

Position Tab



- If necessary, very fine adjustments to size and position of fields can be made here.

Options Tab



- Alignment can be set here.
- Default Value: leave this blank.
- Check Spelling is not required.

- Multi-line will align text to the top of the field, allowing text to wrap. If this is off, the text will appear vertically centered in the form field and will be truncated if the string size exceeds the box size.
- Scroll long text: Only useful if the PDF on a computer.

Creating Form Field PDFs Directly From InDesign

Adobe® InDesign can be used to create a PDF with form fields, however, pertinent field properties will still need to be edited in Acrobat Pro (Font-Size, Font, Check Spelling, Multi-line, and Scroll Long Text). This technique is most useful to create form fields in exact positions.

In InDesign:

1. Add Window > Interactive > Buttons and Forms to your toolbar.
2. Choose a frame to make into a form field.
3. In the Buttons and Forms panel, choose Type: Text Field.
4. Enter the correct name of the Field.
5. Note: The multi-line and scrollable options can be adjusted here.

✕
⏪
◇ Buttons and Forms
☰

Type: Text Field ▾

Name: CatalogTitle

Event: On Release or Tap ▾

Actions: + −

[No Actions Added]




Hidden Until Triggered

▾ PDF Options

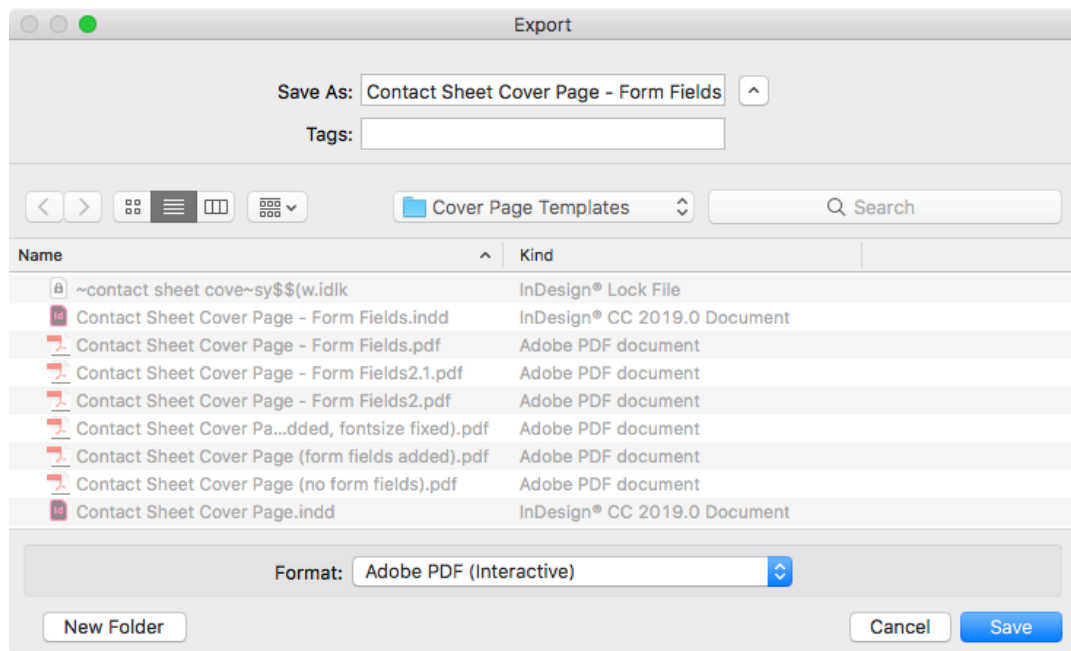
Description:

<input checked="" type="checkbox"/> Printable	<input type="checkbox"/> Read Only
<input type="checkbox"/> Required	<input checked="" type="checkbox"/> Multiline
<input type="checkbox"/> Password	<input type="checkbox"/> Scrollable

Font Size: 12 ▾

6. Save the INDD file.



7. Choose File > Export, and choose format "Interactive PDF".
8. From here, edit the properties of the fields as necessary in Acrobat Pro.

4.4. Fields Workspace

Defining XMP fields in MediaBeacon

The Fields workspace defines each XMP metadata field in MediaBeacon using a specific field configuration asset and metadata in that asset defines the parameters of the field.

This interface for configuring fields has changed greatly from previous versions of MediaBeacon, as well as some nomenclature used. Notably the concept of **schemas** has changed:

- **No Schema Tabs:** In past versions of MediaBeacon, a schema (aka **URI**: Universal Resource Identifier,) was created as a framework for subsequently creating fields. Current versions of MediaBeacon allow independent creation of fields, although a URI must still be defined.
- **No Auto generated Forms:** Each schema automatically generated a Form, but these were not fully editable. Current versions of MediaBeacon do not autogenerate Forms for fields, preventing a proliferation of unused Forms.



Note: Even though new Forms are not automatically generated for schemas, new Forms can be created from schemas as an option while creating a Form.

- **No Namemapping Tab:** Fields no longer need to be "namemapped" as each field has a "display name" field.


4.4.1. Field Configuration Asset Metadata

- **Schema:** The identifier that all fields in a schema share.

- Background
 - In the XMP standard, this is referred to a "namespace URI"
- Best Practices:
 - Currently is less enforced in MediaBeacon than previous versions, it is generally desirable to have a small number of schema for fields created for private use by an organization.
- **Example:**

```
http://ns.companyname.com/en/packaging/administrative/1.0/
```

- **Protocol:** Many URI's begin with "http://", but there is no commitment that they be resolvable web resources. The "ns.", therefore denotes this as a namespace, not web page.
- **Organization Name and top level domain:** "companyname.com/"
- **Descriptors:** *["/en/packaging/descriptive"](#)* - This can be any number of descriptive identifiers that characterise the use of the schema as a whole, in this example "/en" identifies that the data is in English, "/packaging" identifies the fields are packaging related, and "/administrative" might indicate metadata that is not intended for general users.
- **Version "/1.0":** a number that will identify the version of the schema, "1.0" is standard.
- **Ending slash: "/"** this is mandatory on all schema names.
- **Allowed characters:** a-z, A-Z, 0-9 (as long as a number is not the first character in a string), hyphen "-", and underscore "_". Spaces are not allowed.
- **Internal Name :** This is the canonical name of the field, which is the data structure written into XMP and the field's name as it is stored internally in the database.
 - Background:
 - In the XMP standard, referred to as the "local name".
 - Technically, fields are properly referenced to using the XML Expanded Name, composed of the namespace URI and the internal name).
 - Best Practices
 - Allowed characters: a-z, A-Z, 0-9 (as long as a number is not the first character in a string), hyphen "-", and underscore "_".
 - Spaces and slashes "/" \are not allowed.
- **Display Name:** Display name is the default string used to identify a field in the interface, or the name as it is displayed to end users. It can contain any UTF-8 character.
 - Background: This is what used to be referred to as a Namemap or Field Label.
- **Description:** A note area to describe the field. This string is visible to the administrators who have access to the field.



Note: If administrators want to add the description in the field for reference while using the field, use the Field Info field in the Forms dialog box. The given description will be visible when the cursor hovers over the field.
- **Type** (aka Type Validator): This defines the type of data allowed in a field. See the Field Types section for more information on the settings available.

- **UI Element:** This setting defines a field's presentation in the interface. See the Field Types section for more information on the settings available.
- **Required Edit Level:** This setting controls a field's edit-ability compared to a user's group's Edit setting. The group setting must be equal to or higher than a field's setting for a user of that group to edit it. Ranges from 0-9.
- **Required View Level:** This setting controls a field's visibility compared to a user's group View setting. The group setting must be equal to or higher than a field's setting for a user of that group to view it. Ranges from 0-9.
- **Index SQL:** When enabled, this option will index this field (all values in all assets) as a SQL table. The main benefit of this function is that it would allow the field to be used as a Highlight or as an Import/export Key field.
 - **Background:** By default, MediaBeacon allows up to 29 "String," 10 "Date," and 10 "Integer"-type fields. This can be increased but requires a modification to SQL database settings. A number of predefined fields in MediaBeacon use indexing, so the numbers above do not indicate the number available for use.
 - **Best Practice:** There are very few reasons to SQL index a field in current versions of MediaBeacon.
 - This setting allows a field to be used in View component's Highlight config.
 - This setting allows a field to be used as a Key Field in the Import/Export Wizard.
- **Index in R3search:** This option allows a field to be searchable in MediaBeacon.
 - **Best Practice:** The setting here may be 100kb or 1Mb of metadata per file that is indexed.
- **Synchronization Strategy:** Will affect how a field's data is written to the SQL database and into Asset XMP.
 - **Best Practice:** Asynchronous is generally recommended. Following is the overview of different strategies that allow administrators to configure behavior of MediaBeacon's metadata fields:
 - **Synchronous:** Data is written to the database and to assets in XMP. This is the state of all fields in older MediaBeacon systems by default.
 - **Asynchronous:** Instant database update and queued file system update. This option will allow very quick batch updates.
 - **Volatile (Database Only):** Only updates the database. Values in such fields are not written into assets until they are downloaded.
 - **Bundle Settings:** If a given metadata field is set to either the "Bundle Volatile" or "Bundle Asynchronous" field type, the entered value will be inherited by assets within the bundle. Values in such a field will not be editable as normal. Edits will only be allowed by Bulk Edit, M3TAFORM Stamper, M3TAFORM Upload, and M3TAFORM Widget (although multiple assets must be selected).
- **Display Order:** The number here will determine the display order of the field. This field has no function other than when defined in a Form, and is not inherited when a field is placed in a Form.
 - **Best Practice:** Safe to leave blank.
- **Locale Sorting:** Changes rules for the alphanumeric sorting of a field's data in the Web UI, according to the sorting rules for the specified language.
- **Default Value:** A value entered here will automatically be pre-filled to the field whenever it is blank in a Form.
 - **Best Practice:** This is best left blank in Field configuration, to be used primarily in Form configuration.
- **Substring Searching Allowed:** When enabled, this option allows a field's value to be searched on a substring level.

- Background:
 - Without this option, MediaBeacon's standard behavior is to break space delimited data into "whole words". So, normally, a search for "great" will return an asset that had a Keyword of "super great".
 - Enabling the substring option is only needed when it is desirable to return an asset containing the value "aubergine" when a search for the strings "gine" or "berg".
- Best Practice:
 - While of moderate impact on most fields, enabling this option on a field that contains paragraphs of text over hundreds of thousands of files may create unnecessary load on the system.
- **Not Empty:** The field value must contain a value for a Form containing that field to be saved.

4.4.2. Field Type and UI Settings

A guide to XMP field Type Validator and UI Element settings.

Type Validators

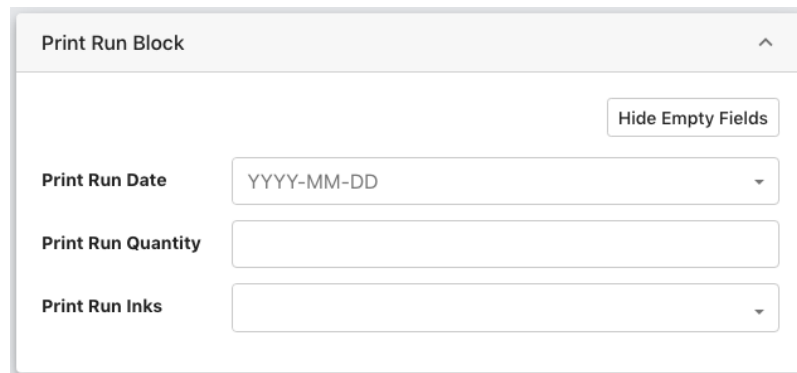
An XMP field's type validator setting controls what type of data is able be entered, preventing invalid date entry.

- **None:** Effectively the same as String, used by legacy MediaBeacon configurations to denote a field that had just been created.
- **String:** Field will allow UTF-8 characters.
- **Date:** Allows only ISO 8601 date format data (YYYY-MM-DD, 1984-10-20).
- **Force Dictionary:** Allows a dictionary to be chosen to restrict entries to the values in the dictionary.
- **Suggest Dictionary:** Allows a dictionary to be chosen to suggest values to be entered in the XMP field.
- **Hierarchy:** This option enables hierarchical functionality for dictionary fields. This option is set manually and the dictionary that is configured with the dictionary field must be formatted as a hierarchical dictionary.
- **Email:** Validates the string entered has a single "@" character with at least 1 letter on preceding and following it.
- **Phone:** Allows digit characters and "-" or "." characters.
- **Integer:** Allows a positive or negative integer value. The value must be between -2147483647 and 2147483647. Only digits and the minus sign ("-") may be entered. This is a 32-bit signed integer.
- **Positive Integer:** Allows a positive or negative integer value. The value must be between 0 and 2147483647. Only digits may be entered.
- **Real Number:** Allows entry of a decimal number.
- **Positive Real Number:** Allows entry of a positive decimal number.
- **Large Number:** Allows a positive integer from 0 to 9223372036854775807 (2⁶³). This is a 64-bit signed integer.
- **Asset Reference:** Validates that an entered string matches a currently extant asset's Asset ID / Record ID. Makes a field CSV even if set to String in UI element. A field with this type validator must have the "Index SQL" option enabled to operate correctly.
- **Data Block:** See the Data Block section, below.

Data Blocks

Data Block fields (aka Repeating Data Block fields) are a data structure that allow a set of fields to be added in a repeating fashion. This is similar in function to multivalue fields, but include several field values for each repeating instance.

The data block uses another Form as a "template" of fields to repeat, using the settings inherent to that Form. This is assigned in the "Data Block" property field in the Edit Field dialog, similar to setting a dictionary for a Force or Suggest Dictionary field.



This Form is the element that will be repeated for the Data Block field.

Edit Field
✕

Schema	<input type="text" value="http://ns.mediabeacon.com/examplefields/1.0/"/>
Internal Name	<input type="text" value="f1_data_block"/>
Display Name	<input type="text" value="Data Block / String"/>
Type Validator	<input type="text" value="Data Block"/>
<input type="checkbox"/> Not Empty	
Data Block	<input type="text" value="Print Run Block"/>
UI Element	<input type="text" value="Repeating Data Block"/>
Required Edit Level	<input type="text" value="5"/>
Required View Level	<input type="text" value="5"/>
Indexing	
Index in R3Search	<input type="text" value="100 KB"/>
<input type="checkbox"/> Substring Searching Allowed	
<input type="checkbox"/> Index SQL	
Synchronization Strategy	<input type="text" value="Synchronous"/>
Miscellaneous	
Local Sorting	<input type="text" value="English"/>
Default Value	<input type="text"/>

The Field configuration for the data block field.

Repeating Data Block ^

Data Block / String

▼ 2019-03-11 🗑

Print Run Date:

Print Run Quantity:

Print Run Inks: PMS 106 ▼

▼ 2019-07-15 🗑

Print Run Date:

Print Run Quantity:

Print Run Inks: Cool Gray 10 PMS 1225 ▼

Add

A Form containing a Repeating Data Block.

Data Block Data Structure & Filter Searching

The values written by a Data Block are not copied to the fields that compose the Form used for the "Data Block" property field setting, instead being written as a strided value.

```

http://ns.mediabeacon.com/examplefields/1.0/

Data Block / String           2019-03-11, PMS 106, 100, 2019-07-15,
                              Cool Gray 10, PMS 1225, 50
```

This data is displayed by the Filter Search as though the values were written to the fields in that "template" Form.

Search Filter - Data Block		^
▼ Print Run Date		
2018-07		1
2019-03		1
2019-07		1
2019-08		1
▼ Print Run Inks		
Black 3 2X		1
Cool Gray 10		1
PMS 106		1
PMS 1225		1
PMS 124		1
▼ Print Run Quantity		
10		1
50		1
100		1

Data Block Configuration

- Using the "Data Block" Type Validator, the UI Element is automatically set to "Repeating Data Block" and the Synchronization Strategy is automatically set to "Synchronous".

Using Data Blocks

- Data block fields are not displayed directly in Filter Search components. Instead, the Filter Search considers the data to be written to the "source" fields.

- When a data block field values are written, all other field values entered using that Form are written Synchronously.

UI Elements

A field's UI element setting controls how it's displayed in a Form. However, some UI element settings directly control data entered or underlying data structure.

- **String:** No special UI, basic data. Displays a single line of text, prevents line-breaking characters from being entered via keyboard.
- **Textarea:** Displays an expandable text-entry XMP field element. Entered line-breaking characters are displayed as breaking strings.
- **Cascade:** Displays hierarchical dictionary XMP fields as a cascade element.
- **Comma Separated Cascade:** Displays multivalue hierarchical dictionary XMP fields as a cascade element.
- **Date:** Displays a date picker on the right side of the field element.
- **Checkbox:** Displays the field element as a checkbox. When the element is enabled (checked), the value of the field will be the string "true". When the element is disabled (unchecked) the value is null.
- **Comma Separated Values:** Allows the field to contain multivalue string data.
- **Comma Separated Dates:** Allows the field to contain multivalue date data.
- **Comma Separated Textarea:** Allows the field to contain multivalue string data that can contain line-break characters.
- **Repeating Data Block:** This UI element is automatically selected when the Type Validator "Data Block" is selected.
- **Simple HTML:** Allows entry of html text. This element uses a rich text editor.
- **Advanced HTML:** Allows entry of html text. This element uses a raw text editor, and a preview of rendered HTML.
- **URL:** This acts as both a validator and as a UI element setting. The string entered must start with "http". Saved values are presented as a clickable hyperlink.
- **Starred Rating:** Allows a starred rating to be entered.
- **Code:** Displays the XMP field value in a code editor.
- **View Only:** Prevents data entry into an XMP field when displayed on a Form. Best practice is to use this setting only in Form configuration.
- **Hidden:** Prevents display of the field when included in a Form . Best practice is to use this setting only in Form configuration, and is often paired with a value entered in the "Default" property field.

List of Valid Combinations

Type Validator / UI Element

- String / String
- String / CSV
- String / Text Area
- String / CST
- String / Checkbox
- Date / Date
- Date / CSD
- Force Dictionary / String
- Force Dictionary / CSV
- Force Dictionary Hierarchical / String
- Force Dictionary Hierarchical / CSV
- Force Dictionary Hierarchical / Cascade

- Force Dictionary Hierarchical / CSC
- Suggest Dictionary / String
- Suggest Dictionary / CSV
- String / Advanced HTML
- String / Simple HTML
- String / URL
- Email / String
- Phone / Email
- Integer / String
- Positive Integer / String
- Real Number / String
- Positive Real Number / String
- Large Number / String
- Asset Reference / String
- Data Block / Repeating Data Block

4.4.3. XMP and Other Metadata Standards

While MediaBeacon offers flexibility for field and Form definition, it must be stressed that XMP nomenclature standards must still be rigorously followed.

Fields also have a large array of possible settings, some of which have implications for downstream data re-use, data design and governance, user experience, or other substantive things.

For these reasons, sections below will list Background and Best Practices for important points.

4.4.4. Predefined XMP Fields



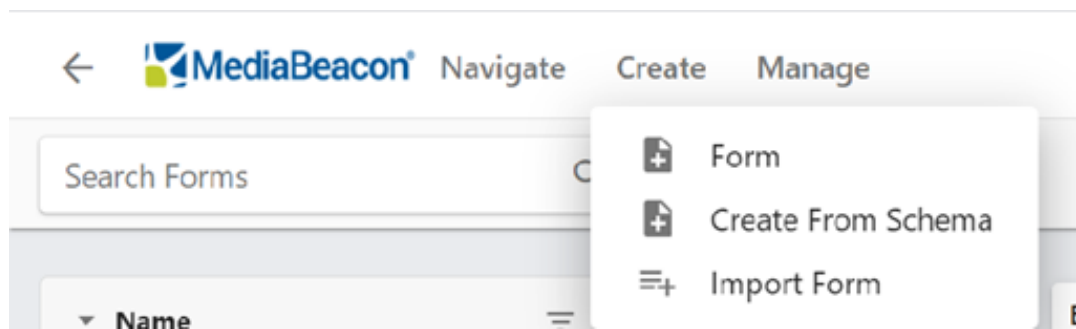
Note: It is highly recommended to leave as is the settings of predefined fields in MediaBeacon. These may have an internal function that require specific settings to operate.

4.5. Forms Workspace

A Form is MediaBeacon's primary way to display metadata. Many predefined Forms are built-in but many will be created by administrators for specific customer use cases. Once XMP fields have been defined in the "Fields" tab, Forms are built using a list of XMP fields, each displayed with separately configurable properties in spindown tabs. The XMP fields that a Form uses may be from multiple schema, and may also display or operate differently than their "base" configuration.

1. Manage > Configuration
2. Navigate to Forms

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



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

Create From Schema
✕

Select Base Schema
▼

Create


Note:

Choose unique names to avoid confusion.

- **Create Form:** Displays the Create New Form dialog, creating a new Form when all required property fields have been filled.
- **Create From Schema:** New in MediaBeacon 2019.x, this command allows all current fields that share a schema to be automatically added to a new Form.

4.5.1. Form Configuration Asset Metadata

Name

The name of the Form. Primarily seen in the Asset View and the Bulk Edit dialog, for end users, but is referenced by the Admin Core in several places, primarily, the Visible Forms field in ACL configuration. When a Form's name is changed, it will need to be reassigned to:

- ACL "Upload Form" field.
- ACL "Visible Form" field.
- Workspace Config: "Default Asset View Form" field.
- Workspace Config: "Default Asset View Tabs" field.

- Workspace Config: "Required Forms for Upload" field.
- Upload HTML component configuration dialog: "Required Forms for Upload" field.
- Form component configuration dialog: "Select a Form" field.
- Infinite Scroll View component: "Forms Required for Upload Linking" field.
- Tile View component configuration dialog: "Forms Required for Upload Linking" field.
- List View component configuration dialog: "Forms Required for Upload Linking" field.
- Video Edit component configuration dialog: "Forms Required for Upload Linking" field.
- Form Stamper component configuration dialog: A stamp that uses fields in a renamed Form will need to be deleted and recreated if edits to that field need to be made.

Class

- This CSS class name is applied to the HTML element containing the Form. Note the Form tab itself is not classed via this setting.

Enable Grid View

- When enabled, the Form is displayed in grid view.
 - Requires that only "Comma Separated" fields be used in the Form configuration.
 - Requires that each of the values contain the same number of entries in each multi value field.
 - When an Form is in this view, values cannot be edited.
 - This type of metadata governance is not encouraged as a database rebuild could change the order of the values. Best practice is to use data block functionality.

Fields Section

This area displays "Form fields" as rows of spin-down panels. These may be an included XMP field or a "static" row, containing only text. Each of these rows contain a number of property fields to define the Form field. Click the "Add" button to add a Form field section.

Field Name

- This field allows the user to choose the XMP field used for the current Form field. XMP fields are listed by Display Name, Schema, and Internal Name.

Display Name

- The name of the XMP field as it will be displayed within the current Form.

Static

When enabled, this option changes the field row to display as a static line of text.

- **Display Name:** Text entered here is displayed as line of text instead of a XMP field.
- **Static:** This option toggles off the static mode.
- **HTML:** When enabled, this option displays the value in "Display Name" as rendered HTML.
- **Order:** Operates as described below.

Not Empty

When enabled, this option makes the field "required". When used in a Form, a required field prevents all XMP fields on that Form from being written until the required field is filled.

Field UI Options

See the [Field Type and UI Settings](#) on page 51 article for a list of these settings.

- **Type Validator:** See the [Field Type and UI Settings](#) on page 51 article for a list of these settings.
- **Default Value:** A string entered here will be automatically pre-populated into the Form field when viewed.

Order

This property field accepts integer values that determine the ordering of Form fields on a Form.

- These values do not reorder Forms fields in the Edit Form dialog, only when a Form is displayed in the Web UI.
- Form fields do not inherit the "Order" value from XMP field properties, being null when added. Form fields, therefore, will display in the order they were added unless this value is set.
- Form fields with a null Order value are assumed to have a order value that matches their "initial order", that is, or the position corresponding to the order in which Form fields were added in the Edit Form dialog. For example, the fourth added Form field is automatically ordered as the fourth field in the Form when viewed in the Web UI.
- If a Form field is given an order value that matches a null field's initial position, the null value field will be ordered before the non-null field.
- Fields that have the same Order value (null or specified) will be ordered in the order they were added to the Form.
- Best practice is to number fields with large values (100, 200, 300, etc, so that rearranging Form fields in the future can be done easily.

Edit Form dialog fields	Form View
Field A (Order: null)	Field A
Field B (Order: 4)	Field D
Field C (Order: 4)	Field B
Field D (Order: null)	Field C

Javascript

Forms can execute client-side JavaScript based on different events, which can be used to build panels that update dynamically based on user activity. These events can trigger for an entire panel or individually by field.

- **On Show:** Triggers upon the Form field being called to be displayed.
- **On Focus:** Triggers when the field becomes the focus of user input, usually by tabbing or mousing to the field.
- **On Blur:** Triggers when the field loses input focus.
- **On Change:** Triggers when a field's value changes.

Field Info

Users can add a description of the Form in the box. The entered definition/text will be displayed when the user hovers over the info icon next to the field name.

Column Count

The value entered here determines the number of columns used to display Form fields in the Web UI.

4.5.2. Changing Type Validator and UI Element Settings with Forms

Changing Type Validator and UI Element Settings with Forms.

Forms allow abstraction of an XMP field's parameters, to alter the function of that field as displayed in that Form. Below are some well-known combinations.

- **Upload Form Auto Metadata:** Using this combination will enforce automatic metadata entry without the user's interaction or knowledge on an upload Form. Using this method, a specific metadata value will be entered whenever an upload is made with that Form.
 - XMP Field: Any Type/UI combo
 - Form field settings: Use UI element "Hidden", and enter a value in the "Default" parameter field. The entry must be valid for the type of field. For example, a valid dictionary value if the field is a Force Dictionary field.

- **Subset Dictionaries per Business Unit:** These techniques can be useful if a different sets of users need to enter exclusive sets of values (dictionaries) in a single XMP field. An example of this might be a "Flavor" field. The first of the two business groups that use the field makes baby food and the second makes pet food. Thus, the dictionaries used by each group need to be different. To avoid having to create business-specific fields, we can use one of the techniques below.
 - **Master Dictionary & Subsets:** In this scenario, the XMP field in question will be a Force Dictionary field, with a "master" dictionary attached. When this field is used on a business-group specific Form, it will be paired with a business-specific "subset dictionary". The master dictionary must contain at least all terms contained in all subset dictionaries, to avoid write errors.
 - **Subsets Only:** In this scenario, a non-dictionary XMP field would be used (Type Validator: String). The Forms themselves ensure no business group user will enter an inappropriate term within their individual context. The major advantage here is that this eliminates the need to maintain a set of master/subset dictionaries. Metadata administrators may find the Filter Search's drag-and-drop tagging feature useful for metadata editing in this case.
 - **Auto Updating Suggest Dictionary & Subsets:** This scenario uses several configuration points in conjunction.
 - Create a "Master" Dictionary, and connect it to a Suggest Dictionary XMP field.
 - Enable the "Synchronize Dictionary to Field" option on that master dictionary.
 - Create subset dictionaries as normal, however, there is no need to add all terms into the master dictionary.
 - Add the XMP field to Forms, but change Type Validator to Force Dictionary, and use a subset dictionaries as needed.
 - This method will cause the master dictionary to auto-populate with terms as they become tagged into assets.

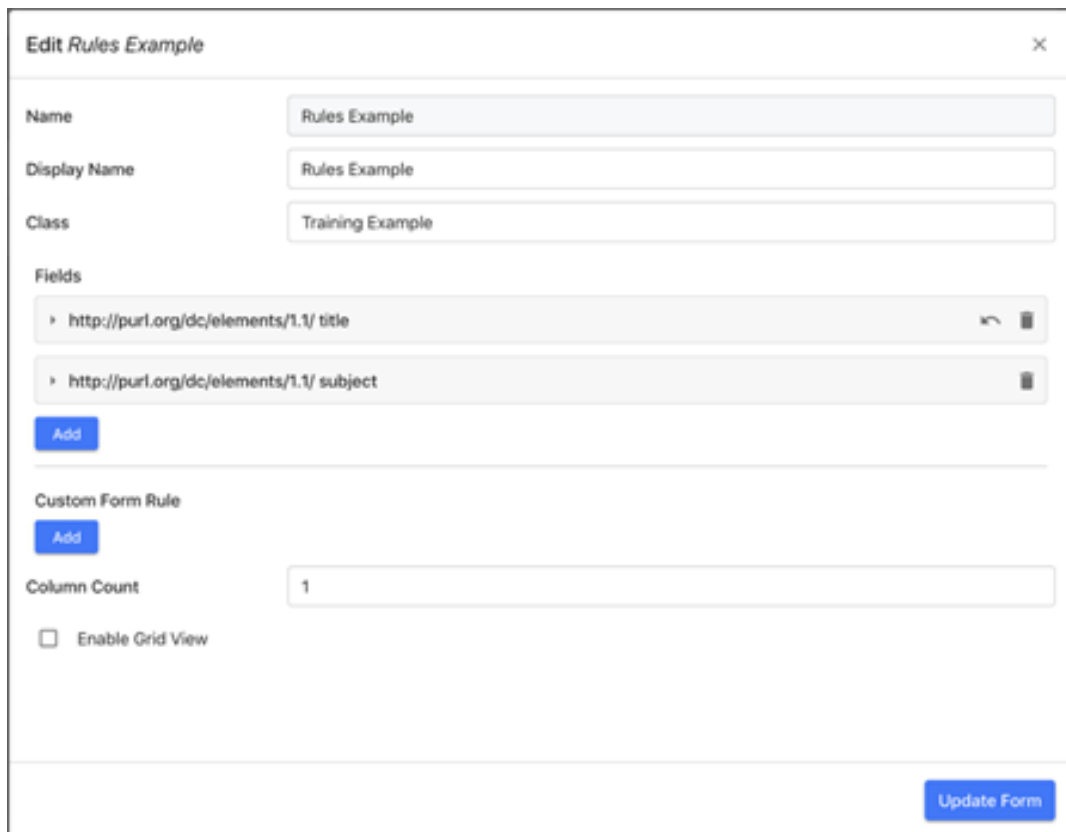
- **View-Only Fields:** While simple to set up, this technique makes it easy to control who can enter metadata and when on specific fields.
 - The UI element "View Only" isn't recommended for use with XMP field configuration, only Form field configuration. This would create an uneditable field in the former case.

- Do not use "View Only" in conjunction with the "Not Empty" option. This will cause the Form to prevent any edits to all displayed fields.
- On an upload Form, a View Only field can be used with the "Default" value to show users values that are being auto-added.

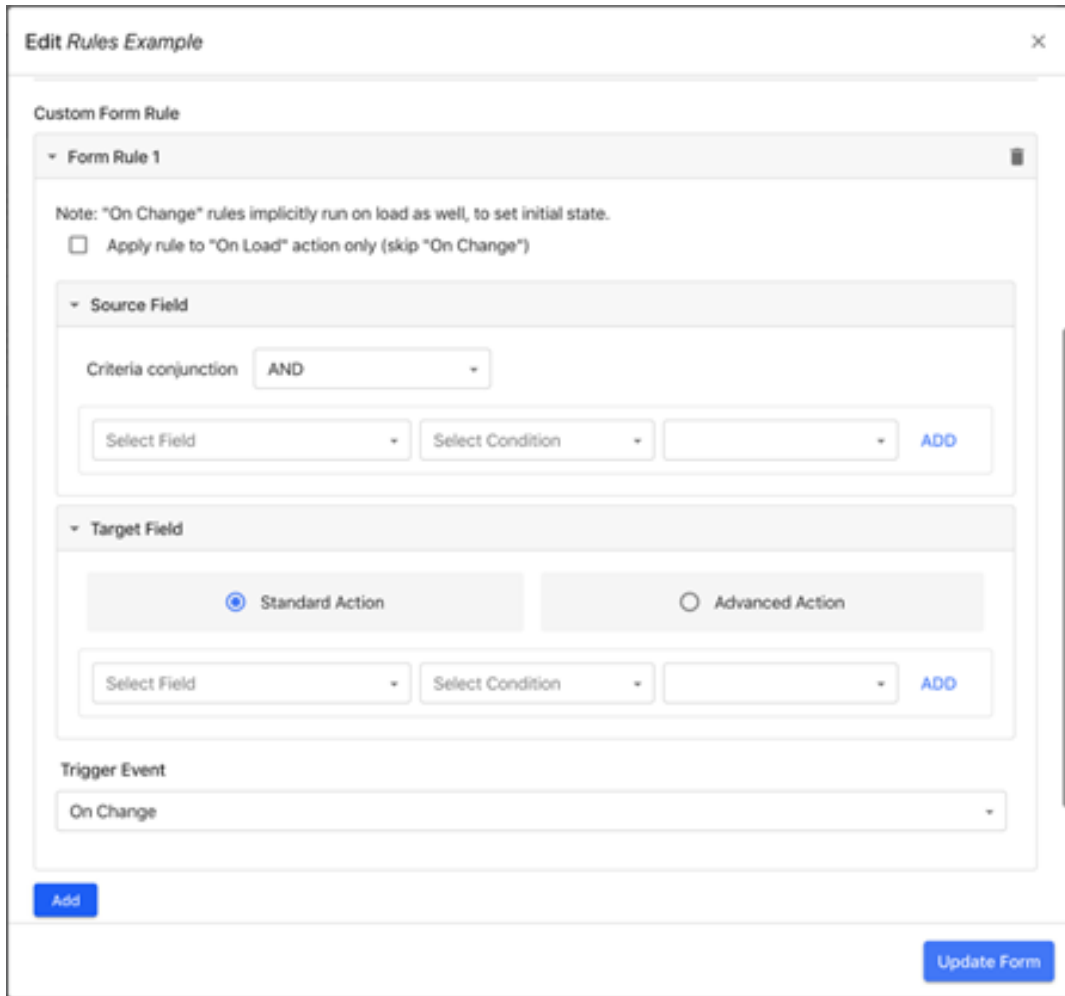
4.5.3. Create Custom Forms

This feature is a refinement of MediaBeacon’s JavaScript framework in Forms, making many commonly-requested dynamic field configurations easy to implement with no JavaScript coding.

The Edit Form dialog now has a new section for Custom Form Rules. It will only be shown when a Form that has existing fields is opened for editing.



- Clicking the “Add” button below “Custom Form Rule” will add a new rule.



Feature Specialities of Custom Form Rules

- The behavior of "On Change" rules running on load was added.
- The option to "Apply rule to "On Load" action" was added.
- "Trigger Field" renamed to "Source Field"
- "Action" is relabeled "Target Field"
- Trigger pulldown no longer contains "On Load", that option becoming a separate checkbox.

Custom Form Rules Interface

Source Field

This subsection defines what field values must be present for a custom rule to be activated. The interface is the same as that used for Advanced Search criteria with the exception that the "Select Field" pulldown will only show the fields that are currently defined in the Form's "Fields" area.

Target Field

This subsection has two main options, Standard Action and Advanced Action.

- **Standard Action:** This interface allows the user to designate one or more #currently-defined#Form fields (and a condition for each) to be activated then the source field criteria are true. Below is a list of Standard Action Conditions and condition values.
 - **Append Value#**(enter a string): This action adds the designated string to the existing value of the target field.
 - **Replace Value#**(enter a string or null value): This action replaces the existing value of the target field with the designated string. A null value will erase values in the target field.
 - **Add Static Text#**(enter a string or a null value): The string here will be displayed as informational text below the target field.
 - **Set Visible#**(choose “true”, “false”, or “match filter”): If true, the target field will be visible. If false, it is hidden.
 - **Set Invalid#**(choose “true”, “false”, or “match filter”): If true, the target field will be marked as invalid and prevent saving the Form. If false, it is normally writeable.
 - **Set Not Empty#**(choose “true”, “false”, or “match filter”): If true, the target field must not be null to allow saving the form. If false, the field may be left empty. #Note that the “Required” label is not shown when this condition is in the true state.
 - **Set Enabled#**(choose “true”, “false”, or “match filter”): If true, the target field may be written to. If false, it will be non-editable.
 - **“Match Filter”:** This option for all the “Set” conditions above allows the true/false status of the source field to activate/deactivate that given condition. In practice, it means that these conditions will not need to have two rules to define a toggleable condition, such as hiding / showing a field when it contains only a specific value
- **Advanced Action:** This allows client-side JavaScript to be entered as the action to perform upon the source field criteria being true.

Trigger Event

The “Trigger Event” pull-down sets the event that triggers the Rules be executed on a form.

- **On Change:** When a user changes field values while using a Form containing a custom rule. This is the most used trigger type.
- **On Submit:** This trigger type only shows a target field, and as such is most useful for “Append Value” or “Replace Value” actions. These actions only occur when the Form is saved.
- **On Post Save:** This trigger only allows Advanced Actions to be executed, occurring after other metadata writes have concluded.
- **On Load:** Triggers when the Form as a whole is loaded.
- **On Submit:** Triggers when the Form as a whole has been submitted to write changed values.
- **On Post Save:** Triggers when the values the Form submitted have been written.

Other Trigger Event Options

- **Implicit On-Load behavior:** This feature will automatically execute the “On Change” trigger once when loading the form, in order to use on change events to set an initial state, especially of “Set” conditions.
- **Apply rule to “On Load” action only (skip “On Change”):** This option, when checked, changes a “On Change” triggered rule to only occur when the Form is opened.

Overridden Set Conditions

“Set” conditions replicate some field settings, but are superceded by field property settings. If a field has the following:

- UI Element set to “Hidden”, the “Set Visible” condition cannot make the field visible.
- An invalid value is entered in a field for the given Type Validator, the “Set Invalid” condition cannot not make it a valid value.
- “Not Empty” checkbox checked, the “Set Not Empty” condition cannot make the field non-required.
- UI Element set to “View Only”, the “Set Enabled” condition cannot make the field writeable.

The best practice when toggleable field states are required is to avoid configuring the base field configuration (or the fields’ Form properties) to the restrictive property options, and instead use Custom Form Rule logic to enforce those properties.

4.5.4. List of Preconfigured Forms

Forms predefined in MediaBeacon.

Industry Standard

- Adobe PDF
- Adobe PDF Properties
- Adobe Photoshop
- Adobe Photoshop Properties
- Adobe Stock Photos
- Camera Data 1
- Camera Data 2
- Dublin Core
- Dublin Core Properties
- EXIF Properties*
- EXIF Properties Additional
- IPTC Contact
- IPTC Content
- IPTC Properties
- IPTC Status
- QuickTime Metadata*
- TIFF Properties
- Rights Management
- Rights Management Properties
- Stock Photo Properties
- Stock Photo Resolutions
- XMP Basic
- XMP Core Properties*
- XMP Media Management Properties

MediaBeacon Defaults

- Approval
- Archive

- Brand Hierarchy
- Campaign Information
- Download Approval
- Facebook Post
- Marketing Fields
- MediaBeacon Default

- MediaBeacon Link

- MediaBeacon MetaData

- MobileApprovalDisplayFields
- Permissions
- Post to Social Media
- R3volution Workflow
- Regions
- Restriction on Download
- Social Media
- Social Media Schedule
- Task Initiation
- Twitter Post
- YouTube Upload

Special Forms

These Forms do not display data as standard

- Advanced XMP: Displays all XMP metadata in an asset, and allows the user to delete an schema of metadata at once. Only Global Administrators have access to this. And they always do regardless of ACL setting.
- Asset Links: Displays MediaBeacon Links.

- Automatic Versions
- Brightcove Cue Points
- Document Report
- Managed Versions
- Used in Assets
- Video Clips
- Video Summary
- Video Transcodes

4.6. Conversion Type

A Conversion Type categorizes and defines preset conversions, as well as defining the allowed parameters of custom conversions.

Conversions are download-only files prepared from an existing asset when a user needs a “rendition” of an asset in another format. Conversions are not saved as assets in the system, rather they are generated internally and sent to a back-end holding directory (the “Loading Dock”) and are retained for up to 7 days, and then automatically removed. Conversions contain all the metadata of the original

asset, but notably, if metadata were to change on an asset before a conversion were downloaded, it would only reflect the metadata present in the original asset at the time of conversion.

Figure 6: Advanced, Basic, Print and Web are examples of Conversion Preset tabs

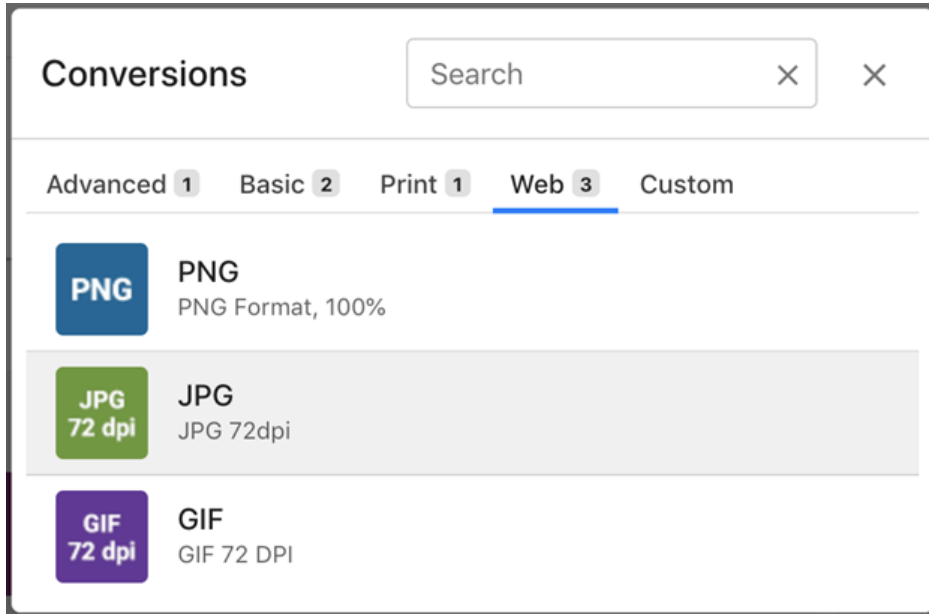
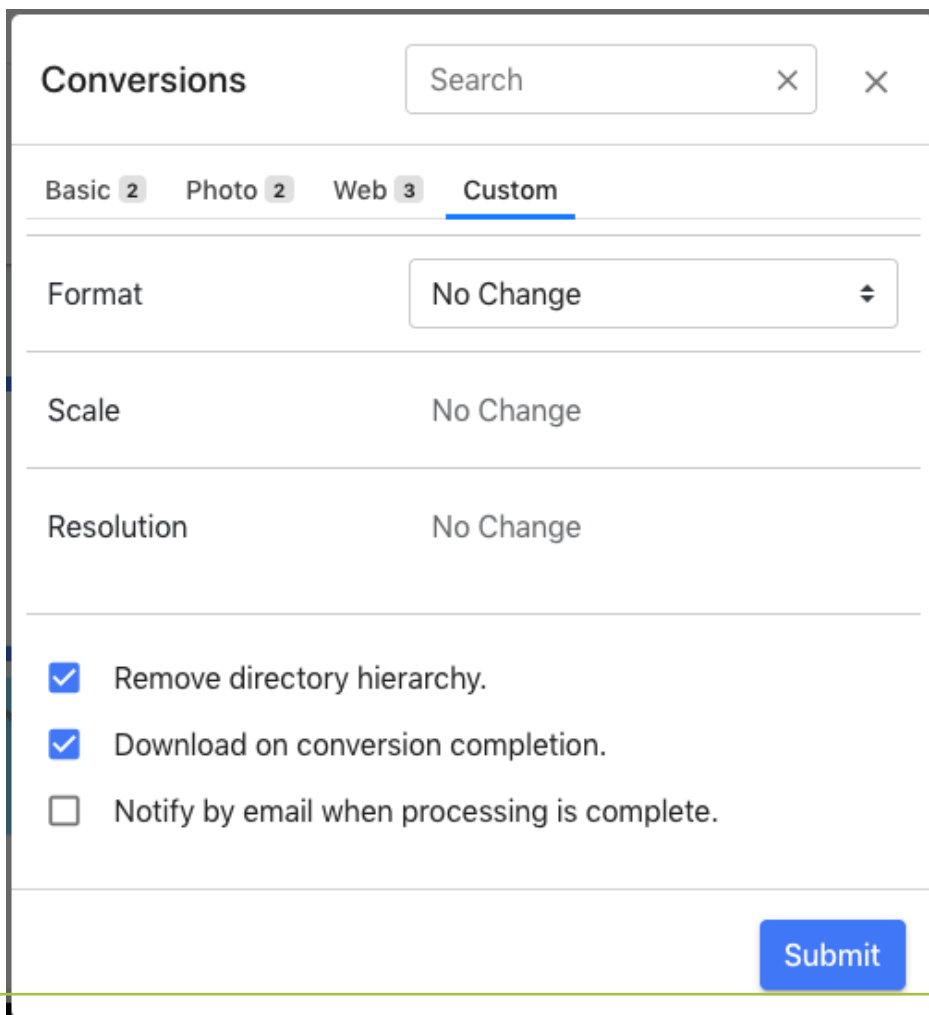


Figure 7: Example of Custom Conversion tab



Conversion Types are associated with Groups via the Conversion Type field in a Group's properties.



Note: The size limit of the Loading Dock is 100GB per system. Please see the [Loading Dock Conversion Retention](#) article for more information.



Attention: Loading Dock Types workspace is renamed to Conversion Type. Users may come across the terminology Loading Dock in the sub sections as the term is still being used in the back end.

4.6.1. Creating Conversion Types

1. While in the Admin Core, go to the Conversion Types: Navigate > Conversion Types.
2. Select Create > Conversion Type
3. The Conversion Type dialog is displayed. Once settings are made, click the **Create** button.

Conversion Type
×

Name

Description

Show Platform

Platform Properties

Show Image Formats

Image Formats Properties

Required Value

Show Rotate

Rotate Properties

Show Scale

Show Custom Scale

4. The new Conversion Type will now be an option in the Group Edit and/or Create Group dialogs as a pull-down for the Conversion Type property. The Conversion Type chosen for a Group will configure what options all users in all ACLs of a group have for downloads.



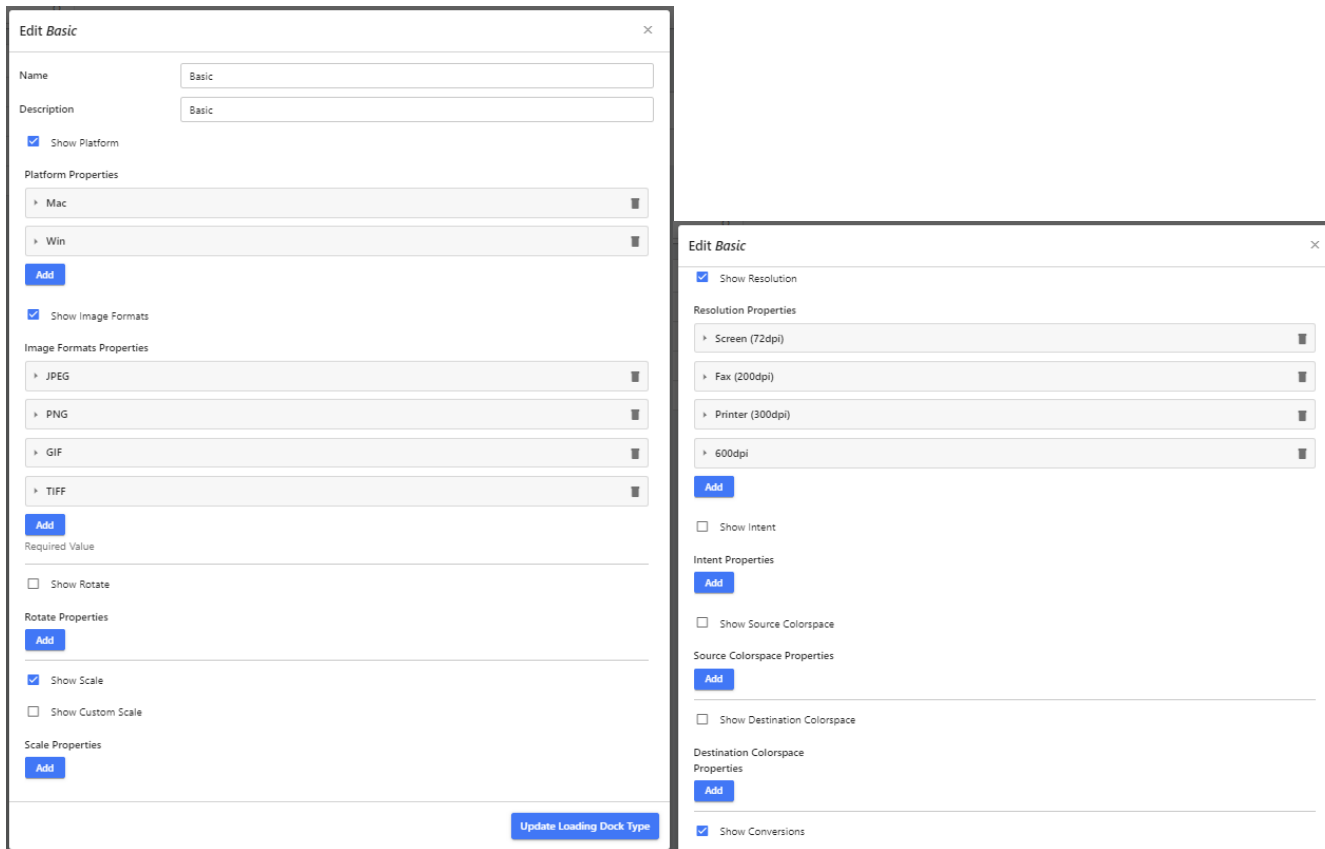
Note: Setting changes to a Conversion Type will be available to users, immediately after the Conversion Type has been saved.

Depending upon configuration, a Conversion will affect settings presented in the:

1. Conversions Dialog Preset tabs
2. Conversions Dialog Custom Conversion tab options
3. Conversion Component Options dialog, which based upon component setting, may appear as a dropdown in the Asset Menu
4. Visual Workflow's Convert Asset Node properties

4.6.2. Conversion Type Configuration

The properties of a Conversion Type are broken down into sections; some of which are used in Conversion Preset tabs, and some are used as pull-down selections in the Custom tab of the Conversions Dialog.



The image displays two screenshots of the 'Edit Basic' dialog box, which is used for configuring conversion types. The left screenshot shows the 'Basic' configuration, and the right screenshot shows the 'Resolution Properties' section.

Left Screenshot (Basic Configuration):

- Name: Basic
- Description: Basic
- Show Platform
- Platform Properties:
 - Mac
 - Win
 - Add
- Show Image Formats
- Image Formats Properties:
 - JPEG
 - PNG
 - GIF
 - TIFF
 - Add
- Required Value: _____
- Show Rotate
- Rotate Properties:
 - Add
- Show Scale
- Show Custom Scale
- Scale Properties:
 - Add
- Update Loading Dock Type

Right Screenshot (Resolution Properties):

- Show Resolution
- Resolution Properties:
 - Screen (72dpi)
 - Fax (200dpi)
 - Printer (300dpi)
 - 600dpi
 - Add
- Show Intent
- Intent Properties:
 - Add
- Show Source Colorspace
- Source Colorspace Properties:
 - Add
- Show Destination Colorspace
- Destination Colorspace Properties:
 - Add
- Show Conversions

- Platform Properties: Custom Tab
- Image Formats Properties: Custom Tab
- Rotate Properties: Custom Tab
- Scale Properties: Custom Tab
- Resolution Properties: Custom Tab
- Intent Properties: Custom Tab
- Source Colorspace Properties: Custom Tab
- Destination Colorspace Properties: Custom Tab
- Conversions Properties: Preset Conversions Tabs
- Video Formats Properties: Preset Conversions Tabs
- Script Options Properties: Preset Conversions Tabs

Each of these sections has a “Show <name of section>” check box at the top, which toggles visibility of that section in the Conversions Dialog’s UI, as well as any place another component would make use of Preset Conversions in its configuration.

Property Section: Custom Tab Section

The below sections are similar in configuration; each section may have any numbers of “blocks”, each one defining the Label and Function of a selection that would appear in a pull-down menu of that section when shown in the Custom Tab.

Figure 8: An example new property block. It has a generic title until it is saved.

Scale Properties

▼ Scale Properties 0
🗑️

Name

Unit



Add

- **Platform:** Defines whether the converted file will be formatted for use with;
 - mac (macOS)
 - pc (Windows)
 - auto (The system automatically determines the platform of the downloading user)



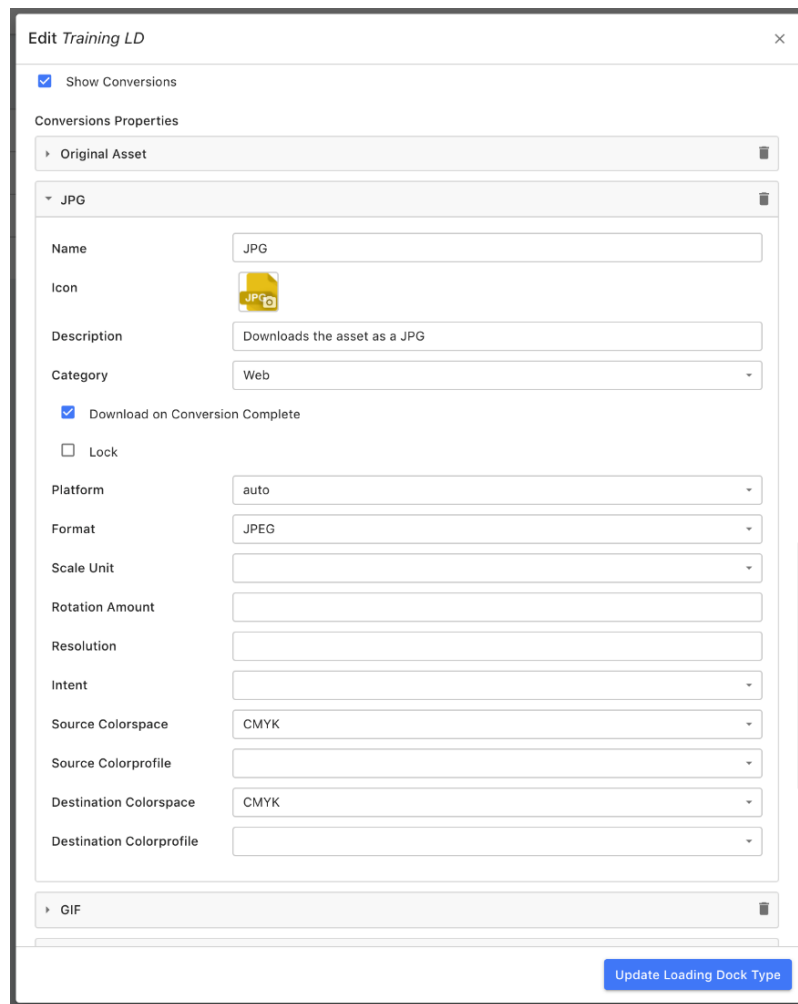
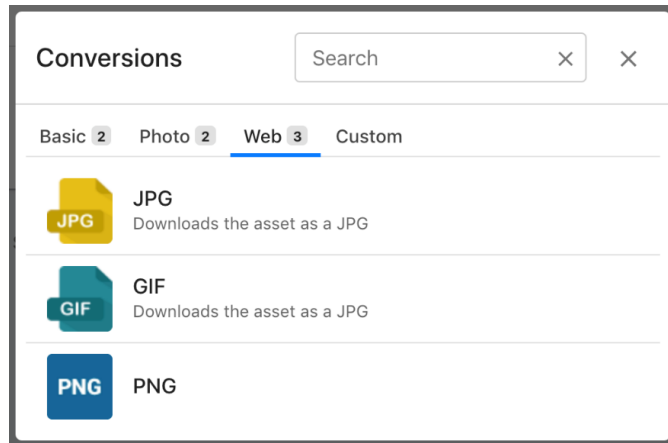
Note: This property is practically irrelevant for modern platforms. This functionality was used for very old implementations of some formats (such as TIFF) that historically had differences in the file structure depending upon on OS platform. In these enlightened days, of course, no one believes a word of it.

- **Image Formats:** The full list of image formats is provided in the appendix of this article. Some formats are listed here as well due to their special implications of use. For the future some kind of reference on Asset transparency is needed. **Refer the [Appendix Section below](#).**
 - EPS (Encapsulated Post Script)
 - Converting a raster image asset into an EPS format will not generate vector art or selectable text, the image will simply be placed in the EPS as a raster object.
 - nochange
 - This property will simply download a copy of the asset, no changes made.
 - PDF
 - Converting a raster image asset into a PDF format will not generate vector art, or selectable text or embed or use fonts from an original asset, the image will simply be placed in the PDF as a raster object.
 - Multi-page PDFs are not generated by the system. For example, a four page .indd document will be converted to a PDF that is a raster representation of the first page of that document.



- PNG
 - This format is somewhat problematic in that per Adobe's standards, PNG images should never have XMP blocks. For this reason, metadata is stripped out of converted PNG files.
- PSD (Adobe Photoshop)
 - Converting into this format does not retain or generate layers, nor add any kind of enhanced editability over a flat-raster format.
- **Rotate:** Allows a value from 0-360 to define the rotation of the conversion. Using this in 90° increments is typical, but if an odd angle is used, the converted image will use a white background behind the rotated image.
- **Scale:** Allows scaling settings to be added to a conversion. The Unit designated for this property allows an image to be scaled by a static percentage, within a predefined maximum height and width.
 -  **Note:** When scaling an image with a conversion it is worth noting that the image will be re-sampled.
 -  **Note:** Scaling will always retain assets' aspect ratio. If a 100 x 200 image is converted using a 300 x 300 scaling, the resulting image would be 150 x 300.
- "Show Custom Scale" check box: This allows the user to designate a scaling using either Percentage or pixels.
- **Resolution Properties:** This property will scale images based upon the image's built-in resolution setting. For example: if a 100 x 100 image at 72 dpi were downloaded as 300dpi conversion, it would be re-sampled to 416px x 416px.
- **Intent:** This property, when set, will enable more advanced color conversion options. This is most often used when converting an image in a known color space to another known colorspace, for example RGB to CMYK. For more information on the individual settings' effects, please see https://en.wikipedia.org/wiki/Color_management#Rendering_intent.
- **Source / Destination Colorspace:** Allows the Source and Destination colorspace to be defined as RGB, CMYK, or GRAY.
- **Source / Destination Color Profile:** If the Source or Destination Colorspace is defined, an ICC profile may be designated for that respective property. The list of ICC profiles is internally defined.

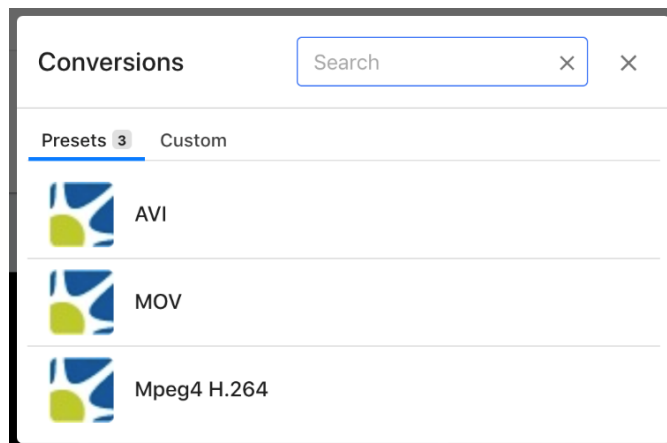
Property Section: Preset Tab Section

- **Conversions:** This section controls "configuration presets" that will be presented throughout the system.



- Each repeating block represents a preset suite of conversion settings.
 - **Name:** The name of a preset.
 - **Icon:** The standard icon picker is used to define the icon used for the preset.

- **Description:** The text here will be shown under the Name, providing explanation to the user.
- **Category:** This field may contain any value, not just the predefined category labels that are show in the pull-down. Values here generate one or more conversion tabs that the labeled conversions will be organized within.
- **Download on Conversion Complete:** This property allows conversion preset downloads to immediately download once the conversion processing has completed. If this is not set, the user will need to initiate a download of converted assets from the Notifications (Bell) Menu.
 -  **Note:** It should be considered standard to enable this property for all conversion presets, as it provides a more-responsive download experience for users.
- **Lock:** Deprecated, has no function.
- **Conversion Settings:** This set of properties in the conversion block are analogous in function to those the Custom Tabs section, but for only one conversion preset. Please refer to those sections for a discussion of the function of these properties.
 -  **Note:** Some property fields control the visibility of other fields in this form, hiding them until a value is chosen. Platform, Format, Source Colorspace, Destination Colorspace all operate in this manner
- **Video Formats:** This type of conversion is only presented when the user's download selection contains only video assets. If a selection contains still and video assets (which have no conversions in common) the Conversion dialog is not displayed and the originals of these assets are downloaded.



- Show Video Formats
- Add New Video Formats

Video Formats Properties

▼ MOV
🗑

Name

Allow Edits

Video Format

Category

- **Name:** String used for the Video Conversion's name.
- **Allow Edits**
- **Video Format:** The format used for the conversion. This list is defined by the "Movie Profiles" present in the system, defined in the MediaBeacon Server GUI App control panel.
- **Category:** This functions in the same manner as the Category property in the Conversions section, see above.



Note: Best Practice Suggestion: Because a video conversion is a more server intensive operation in terms of processing, and the fact that conversions are only kept for a limited time. The use of video conversions can create unnecessary load on a system. It may be preferable to rely upon "Prepared Movie Profiles". That is, Movie Profiles that are set to automatically generate when a video asset is uploaded. These then function as pre-rendered conversions and are accessible via the "Video Transcode" Form

- **Script Options:** This section allows configuration of preset conversions that are customized. These types of conversions usually call a .BAT script on the server to leverage custom settings for use with MediaBeacon's conversion libraries, or a or a Photoshop Droplet .EXE to perform a conversion.

Script Options Properties

▼ Loading Dock Properties: Script Options 0
🗑

Name

Description

Image Key

Script Path

Edit Original

Format

Output Format

- **Preset Properties**

- **Name:** Preset's Name
- **Description:** Preset's Description
- **Image Key:** This defines the icon of the conversion. This feature does not use the Icon Picker directly to define its icon, but uses the UUID of an icon that's been loaded into the Icon Picker. See the "Global Icon Key" section for more on how to extract this UUID.
- **Script Path:** This is the explicit filepath on the server to the script file. Scripts and droplets must be added to the \m-userinfo\m-utscripts\ folder within MediaBeacon. The server must then be restarted. C:\Users\Administrator\MBAssets\m-userinfo\m-utscripts\Script Options Example.bat
- **Edit Original**
- **Format:** This defines what format an asset must be to have this Script Option as an available Conversion Preset. The value here should match the string of the corresponding image format. Refer [Loading Dock Appendix](#).
- **Output Format:** This defines the format of the output. Similar to the above property, the value here should match the string of the corresponding image format, and match what format the script outputs.

Best Practices Suggestion

If the users of an ACL do not require use of Custom Conversions, it is good practice to include the “Custom Conversions” Permission Restriction in that ACL. This inclusion will suppress the display of the Custom tab in the Conversions dialog, thereby making these properties irrelevant to configure.

4.6.3. Loading Dock Conversion Retention



Note: The “Loading Dock Quota” property is not present in MediaBeacon 20.2 and later. Conversions (download-only files retained in the Loading Dock cache) are kept by MediaBeacon:

- for up to 7 days, or
- until their conversion notification is deleted, or
- the MediaBeacon instance’s conversion Loading Dock cache becomes filled (default maximum of 100GB).

When the Loading Dock cache’s limit is exceeded (the total disk space taken up by all conversions), the oldest conversions will be deleted automatically as needed.

This limit may be adjusted by a system property: `mb.ld.cache.size.gb`, the default value being 100 (value designates number of Gigabytes).

4.6.4. Conversion Type Appendix

List of Image formats:

1. AVS
2. BMP
3. CMYK
4. DCX
5. EPS
6. FAX
7. FITS
8. GIF
9. GRAY
10. JNG
11. JP2
12. JPEG
13. MIFF
14. MNG
15. MONO
16. MTV
17. nochange
18. OTB
19. P7
20. PCD
21. PCX
22. PDB

- 23. PDF
- 24. PICON
- 25. PICT
- 26. PNG
- 27. PNM
- 28. PSD
- 29. RGB
- 30. RGBA
- 31. SGI
- 32. SUN
- 33. TGA
- 34. UYVY
- 35. VICAR
- 36. VIFF
- 37. WBMP
- 38. YUV

For more information on file formats, please see the [“Supported Image Formats”](#) Section of ImageMajick documentation. Please note that not all the formats supported by this tool are implemented or even implementable in MediaBeacon.

4.7. Admin Core Menu Commands

Administrator-only options in the Configuration > Manage menu.

4.7.1. History Dialog

History Dialog displays the detailed history of every asset in the MediaBeacon.

Administrators can filter through the history by the following

- **Asset:** The Asset ID of the asset.
- **User:** Activities of all users or a selected user.
- **Group:** Activities in all groups or a specific group.
- **From and To:** Date range of the activities.
- **Action:** All the activities or any specific activity like
 1. Password Changed
 2. Check Status
 3. Check In
 4. Checkout
 5. Comment
 6. Configuration
 7. Conversion
 8. Copy
 9. Delete
 10. Deny
 11. Download
 12. Download Config

- 13. Duplicate
- 14. Edit
- 15. E-mailing of Asset
- 16. External Publish
- 17. Failed Log in
- 18. Generate PDF
- 19. Import
- 20. Lock
- 21. Log in
- 22. Move
- 23. New
- 24. Rename
- 25. Rendition Publish
- 26. Rendition Unpublish
- 27. Replace
- 28. View Replaced
- 29. Resubmit
- 30. Collection Update
- 31. Unlock
- 32. Update
- 33. Upload

The history dialog table displays the activities with its description along with the Date and time, Asset Id, and the name of the user responsible for the action.

Administrators can also sort the history dialog table using the arrow next to the Date column. This sorts the history based on the time the activity commenced.

The pagination is similar to the Tile View in MediaBeacon.

Export to CSV: This button can be used to download a CSV file of the history to the system

4.7.2. User Invitations

MediaBeacon's invitation system is a way to quickly on board a number of local users with a minimum of Global Admin effort. An invitation creates an email, link, or activation code that gives a users a self-service method of account creation. One notable difference between invitations and normal user accounts is that invitations are not stored as XMP assets, and as such have limited edit-ability once created.

Users created by an invitation does not count or counts against the number if users a given license allows. For more information read the license parameters.

Creating an Invitation

Once the **Menubar > Manage > Configuration > Create > Invitation** command, is chosen, the Invitation dialog is shown. It's titled "Activation Code: ".

Create Invitation: 1896576901
 ×

ALERT CALLOUT: This number is both the key for creating accounts, and identifying them for later management so it may be worth copying before filling out the below form.

- **Number of Users:** The maximum number of users that can be created by a given invitation.
- **Email Details:** Sending an email is optional. If so the Activation code or link will need to be copied by hand. It's recommended that global admins send the invitation email to themselves for forwarding even if they are not going to designate recipients initially.
 - **To:** Allows one or more (comma separated) email addresses to receive the invitation email. Unlike other email forms in MediaBeacon, this one does not prefill user accounts / email addresses as it is assumed the recipients are not already in the system.
 - **Subject:** Standard email functionality.
 - **Body:** Standard email functionality. Will also contain the link to complete an account activation when sent.

- **Default Group:** The invitation system allows the user to choose one group the users will belong to. If more than one group is needed, this may be added to users via normal editing or bulk edit once they have created their account. This field cannot be left blank.
 - **Required Fields:** In addition to a username, the User Account Contact fields may be set to required, for the invited user to supply. It's recommended to include "Email" with every invitation.
 - **Create Invites and Send Email** button: The To and Subject lines will need to be filled to send an email properly.
 - **Create Invites:** Immediately creates the invitation, displaying the "Email Users" dialog, to remind the admin to send the activation link to users.
- ALERT CALLOUT: This is the only time that the link can be copied at this point. Double check it has been completely copied. Clicking "OK" or "X" clears the dialog.

Managing Invitations

- Once created, an invitation's status can be reviewed by clicking the **Menubar > Configuration > Manage > Invitations** command, opening the Invitation User Summary dialog
- **Invitation Name:** Unique Identifier for each invitation.
 - **Activation Code:** The code as seen in the "Activation Code" dialog. This is the easiest cross reference to each invitation.
 - **Invited Users:** Number of users initially invited.
 - **Remaining Users:** Remaining users for the given.
 - **"X" (Delete)** button: This will delete the invitation.

Using an Invitation

Via Link

When the user follows an activation link, the user is redirected to the MediaBeacon site:

1. The Create Account dialog is displayed.
2. The user enters required fields and clicks "Create".
3. If the account is successfully created, the "Success" dialog is displayed, the user then clicks "Close" to return to the MediaBeacon login screen.

Via Activation Code

The activation code from an invitation may also be used to create accounts to be used, but the "Create Account" link option must be enabled in the Log In component on the Log in workspace. For more information on how to enable this function.

To use, the user clicks the **Create Account** link, displaying the **Enter Activation Code** dialog.

1. The user enters the activation code, and clicks "Create". If the activation code is valid, the steps of account creation above in **Via Link** are followed.

INFO CALLOUT: The activation may also be postponed to the following string to make an activation link: "<http://externaltraining2.mediabeacon...tMain.html#!CU>"

4.7.3. Admin Core System Status Dialog

A dashboard for various system performance interfaces.

The properties are arranged into smaller subsets of major system statuses as follows:

System Info	User Info	Workflow Info	Queues	Logs
Health	Login Information	Status	File Action Queue	Admin Core Global
Statistics	API Keys	Triggers	Preview Queue	Admin Core Request
External Links				Admin Core Web Server
Long Running Queries				

Refer [System Status Logs](#) in Administrator Menu Commands for more details on other logs.

Admin Core Logs

Logs in Admin Core are different from other System Status Logs. The logs in admin core are the admin-centric logs that are separate from other logs in the MediaBeacon.

Refer to [Logs](#).

- **Admin Core Global:** All the logs regarding the admin core are listed.
- **Admin Core request:** All the logs regarding the web server requests are listed.
- **Admin Core Web Server:** All the logs regarding the functions in the hosted web servers are listed.

These logs help in diagnosing suspected issues.

The common properties of logs contain

- **Download logs:** This button enables the administrator to download each log.
- **Load all:** Hovering over this button displays the total size of each log, and the administrator can load all logs of the particular section by clicking this button.
- **Filter:** Filter tab can be used to search logs using any value.
- **Sort:** Info is the default sort value. The administrator can select from the dropdown list to sort the logs. The sort options available are
 - All
 - Finest
 - Fine
 - Finer

- Config
- Info
- Warning
- Severe

4.7.4. Download configuration

This button enables the user to download the current MediaBeacon configuration. This helps the user to troubleshoot issues with MediaBeacon Customer Care.

Downloads the configuration of MediaBeacon including the **logs, m-user info, mediabeacon.properties, Workflows, workflows.txt** as a ZIP file. These XML files can be used as a backup for the database and testing and debugging the instance. Administrators can create a similar instance using the downloaded configuration.



Note: In MediaBeacon 22.07, the Dynamic Dictionary is also a part of the m-user info.

4.7.5. Download Admin logs

Downloads the admin core related logs as XML files which can be used for data backup, debugging and, testing.

5. Web UI Configuration

This section covers administrator-level configuration options for workspaces and components.

5.1. Workspace Configuration

MediaBeacon's workspaces and components can be configured by Global Administrators in three ways, Admin Mode, Admin-Only menu commands, and Option & Configuration dialogs. The first two are discussed below, while dialogs are covered in context throughout Workspace Configuration subsections.

5.1.1. Admin Mode

Figure 9: Normal View

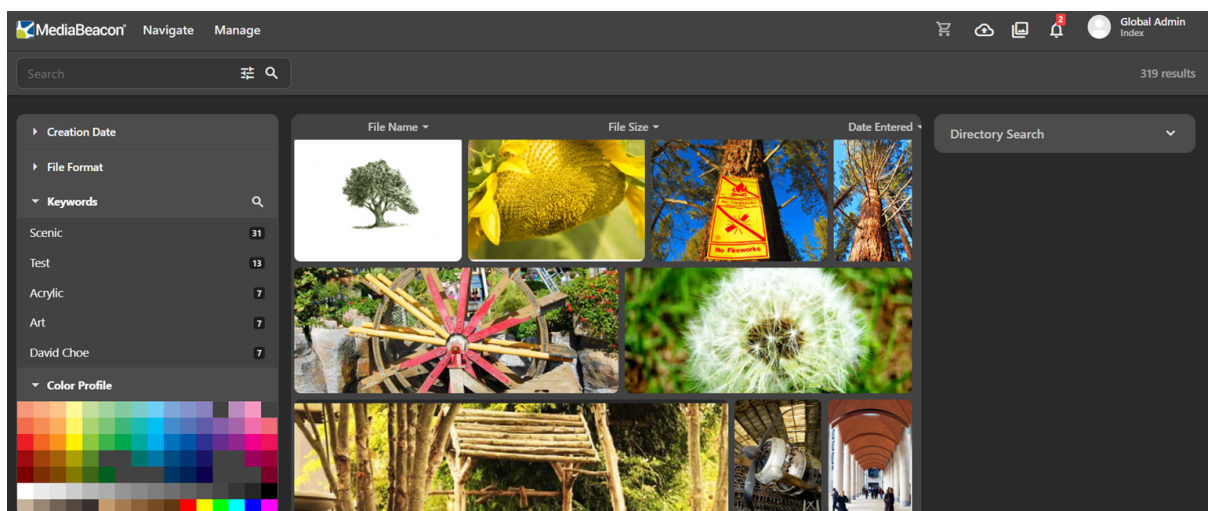
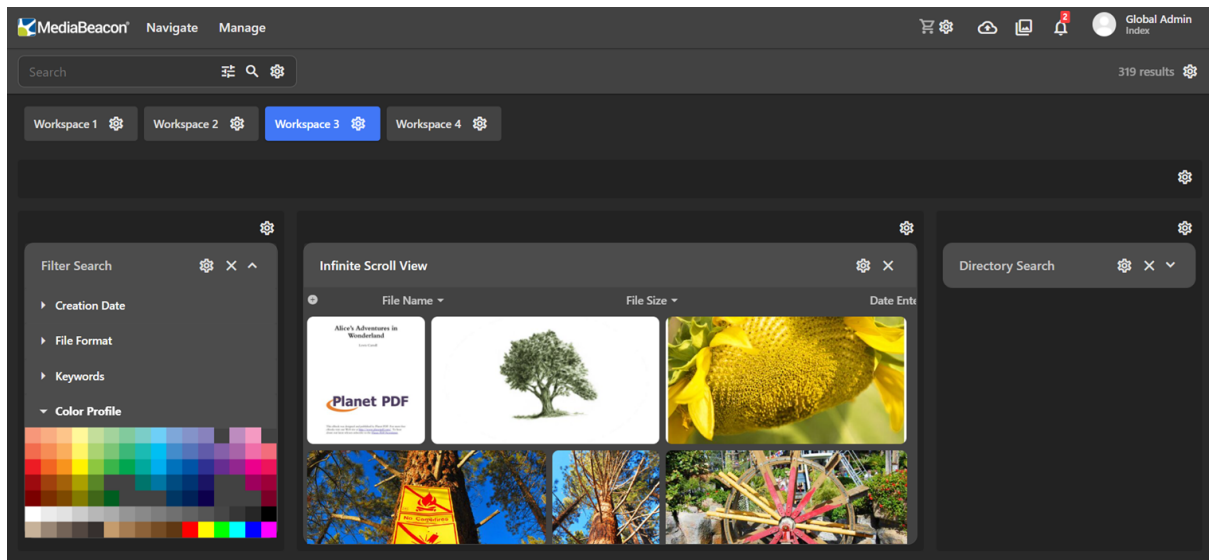


Figure 10: Admin Mode

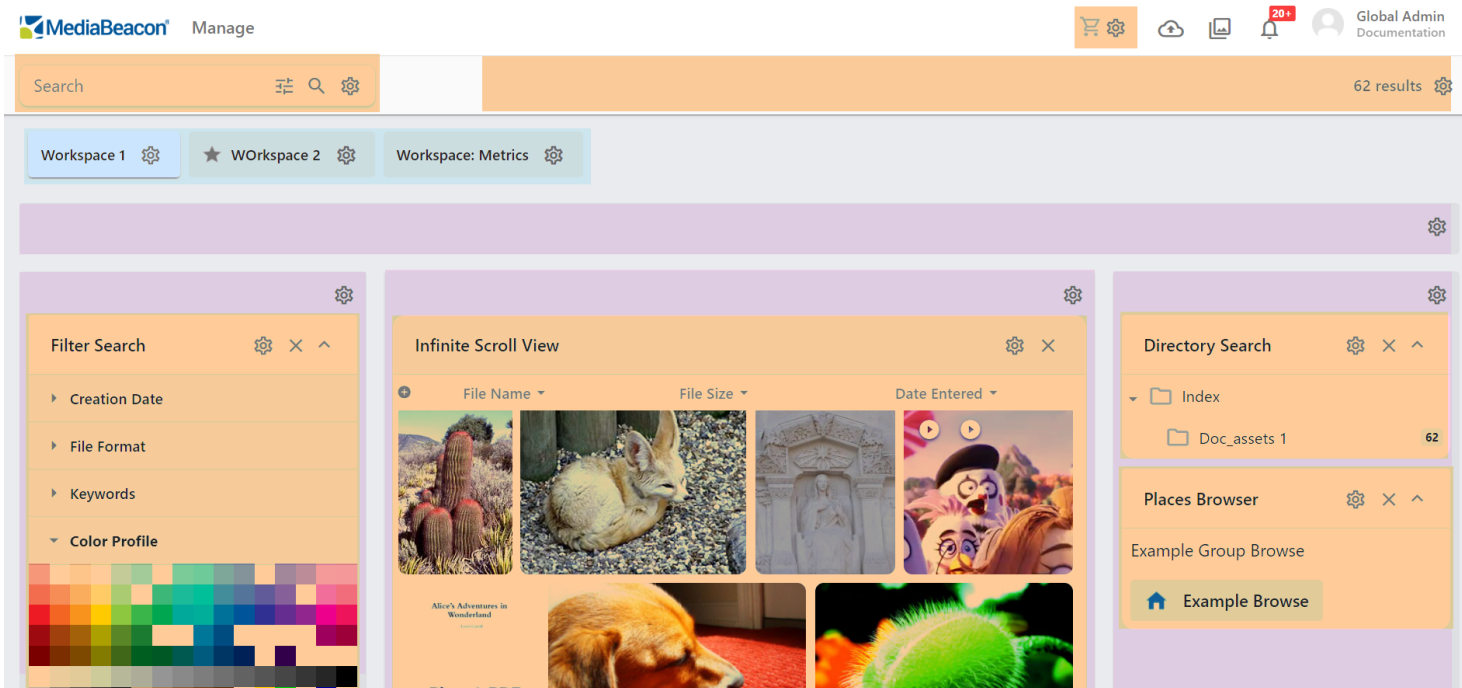


A key concept in MediaBeacon configuration is "admin mode". In this state, the UI is displayed with additional elements allowing access to a variety of different configuration interfaces.

Admin mode is enabled by either a contextual menu command, or a keyboard shortcut:

- Selecting the "Admin Mode" command in the workspace contextual menu.
- macOS: Command-Shift-A
- Windows: Control-Shift-A

While in Admin mode, the UI displays several configuration elements:

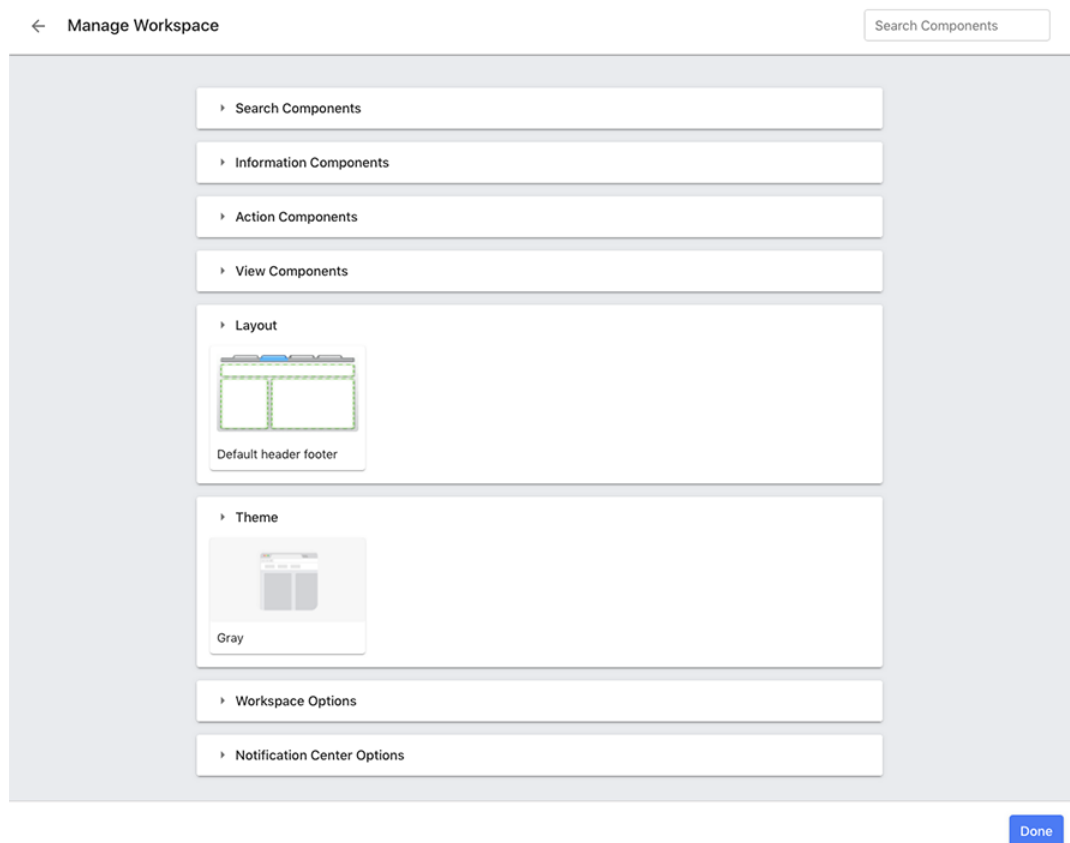


- Workspace Tabs (blue)

- Layout Zones (purple)
- Components (orange)
- View component filter header configuration
- Form Stamp component configuration
- Gear Icons, indicating
 - Workspace Tab Menus
 - Layout Zone Configuration Panels
 - Component Configuration Panels

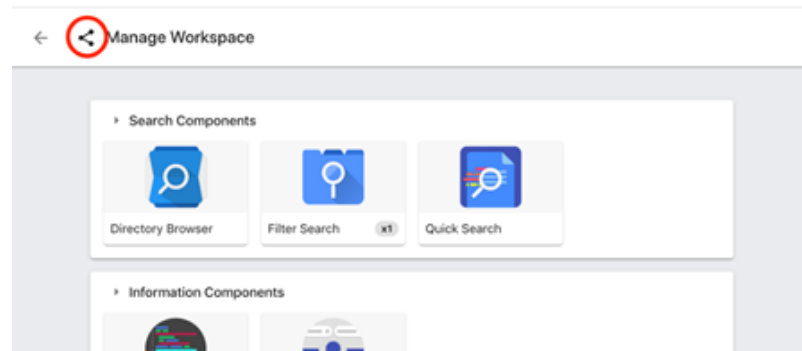
5.1.2. Manage Workspace Dialog

Options for workspace configuration in the Manage Workspace dialog.



The Manage Workspace dialog controls workspace behavior in most respects.

A visual indicator has been added to the Manage Workspace dialog to indicate when a workspace is shared with one or more other ACLs.



Dialog Sections

General

- **Back button** (left arrow in the dialog's upper left): Cancels changes to workspace configuration.
- **Done button**: Applies changes to configuration.
- **Search Components field** (in the upper right of the dialog): Text entered here will filter the components displayed in the components sections.
- **Add New Workspace**: Refer the section [Adding Workspaces](#).



Note: If there is a share icon next to Manage workspace, the workspace is shared.



Note: Adding workspaces in the component sections are added or removed immediately, regardless of clicking "Done".

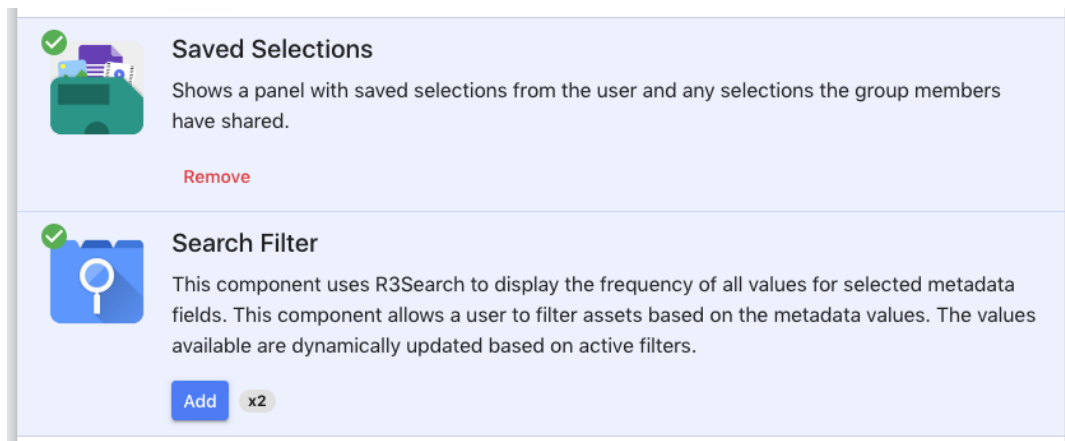
Component Sections

Four spin-down sections are listed here, each a different class of component:

- Search Components
- Information Components
- Action Components
- View Components

Components can be added to the workspace in these sections, and the "Search Components" field will filter components based upon their name.

Note that some components can have multiple instances present on a workspace, and others cannot. When a component is added to the workspace via the "Add" button, this is indicated as shown below.



- **Single-instance components:** The **Add** button becomes a **Remove** button.
- **Multi-instance components** will show a "number of instances" indicator (xNumber) to the left of the **Add** button.



Attention: Note that to remove multi-instance components, this must be done outside of the Manage Workspace dialog, by clicking the **X** button on the component's title bar while in admin mode.

Layout

The Layout section allows the user to choose between different arrangements of layout zones for the workspace. The **Default header footer** is the most flexible of these and is the most commonly used.

- **Recommended Layout:** Default Header footer
- **Other Layouts:** Default, Default header widget, Single column, Single column view, Three by two, Two column, Two column header footer, Vertical columns

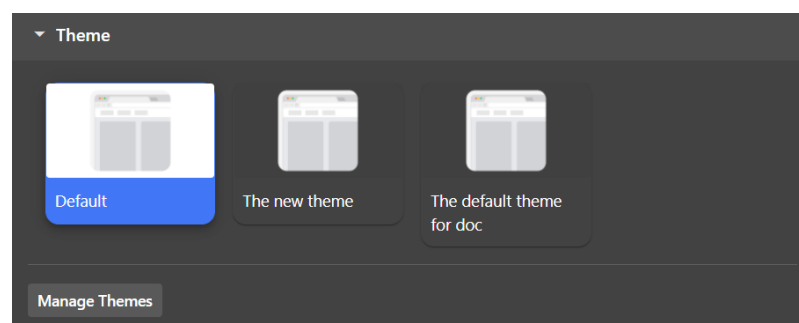


Caution: Note that when a layout is changed, the components may be rearranged.

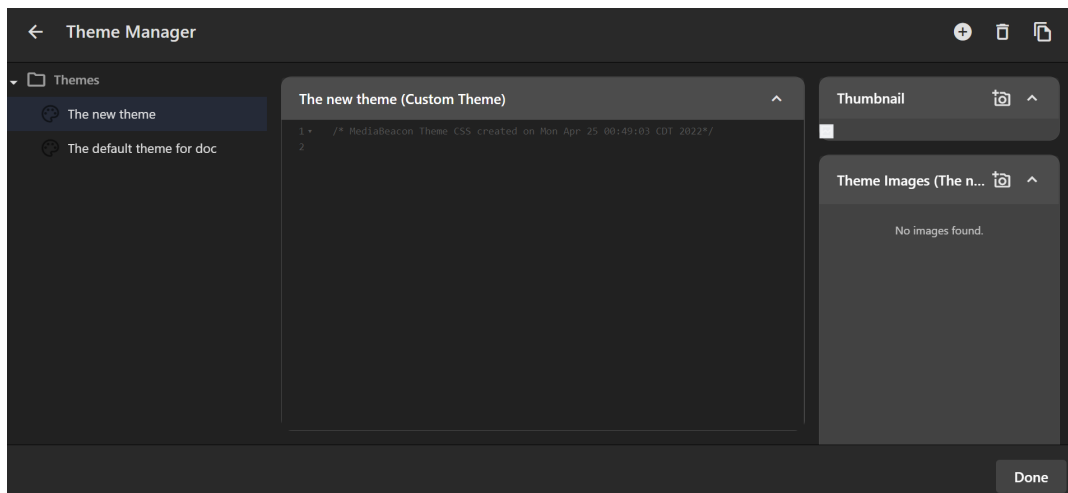
Themes

This option is tuned off by default and the custom theme is used for the workspace.

The Theme manager is accessible only when the Theme is enabled by the system properties.



New themes can be added via Manage Themes > Theme Manager.



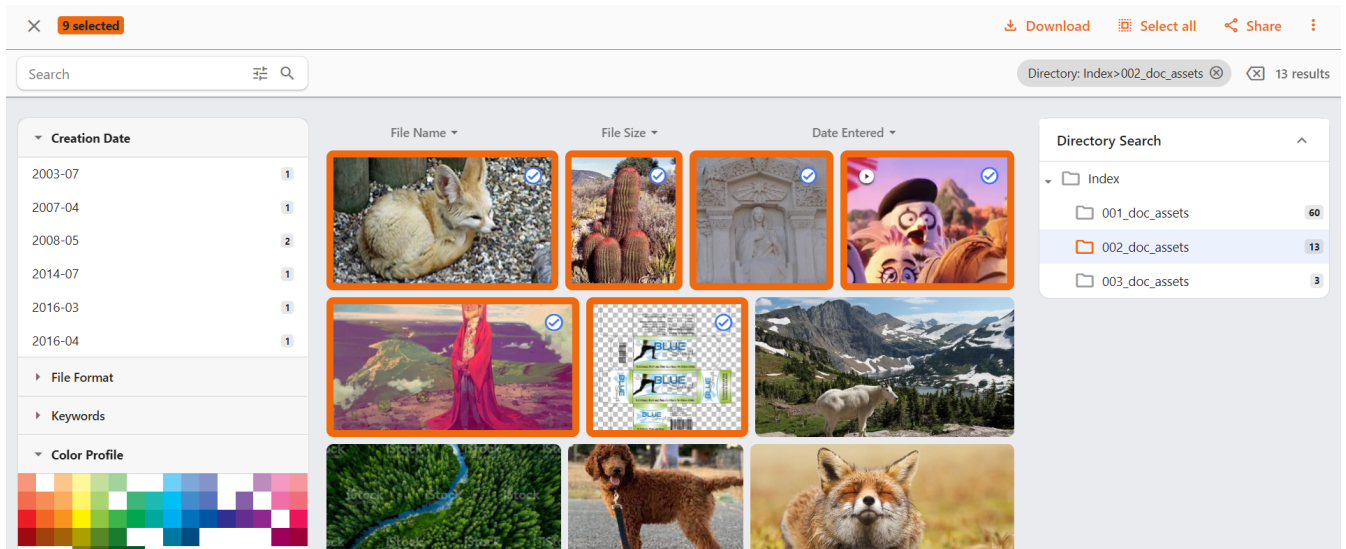
Note: New themes are created using CSS.

- **Add Theme:** Creates a new theme. To rename, double click on the theme name.
- **List of themes:** The newly added themes is displayed on the left.
- **Delete:** Deletes the selected theme.
- **Duplicate Theme:** A copy of the selected theme is added.
- **Upload Theme Thumbnail:** Uploads the theme thumbnail image.
- **Add Image:** Uploads the theme images.
- **Save:** Saves the current changes.
- **Done:** Returns to Manage Workspace.

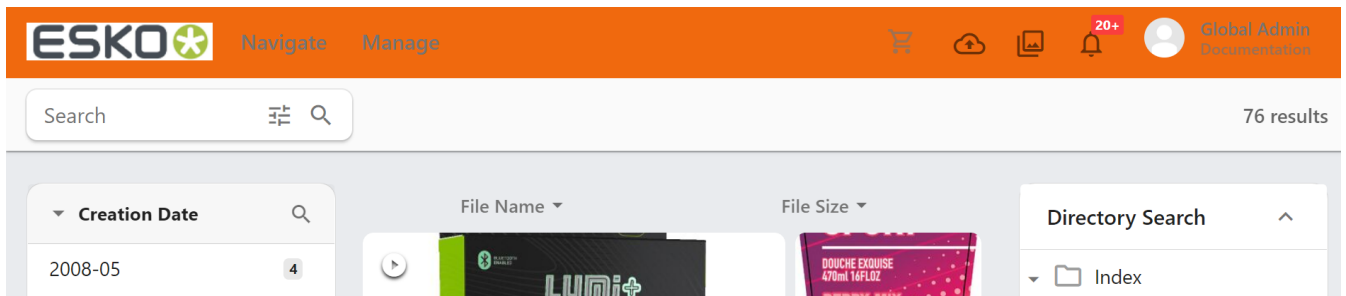
Workspace Options

Styling Options

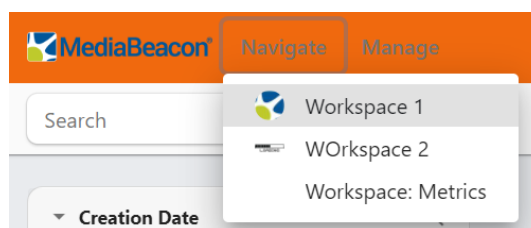
- **Hide Menu Bar:** Hides the menu bar on the workspace. This option is disabled by default.
- **Hide Workspace Tabs:** Hides the workspace tabs. This option is enabled by default.
- **Theme Color:** This changes the "primary" color of the workspace: button color, toggle color, folder and asset selection color, etc.



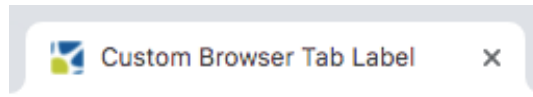
- **Menu Bar Background Color:** This color selector allows the admin to choose a different background color for the menu bar. Note that the text will automatically change to a contrasting grey scale color, and that the pull down menus themselves remain as the theme color dictates.
- **Home Button Icon:** An icon may be chosen here, using the standard icon picker. The home button displays at 140x38px, and the icon will scale to fit within that area.



- **Dark Theme Home Button Icon:** If the dark theme is turned on, the uploaded Home Button Icon may be distorted. Instead an icon can be added for the dark theme enabled workspace.
- **Workspace Icon:** An icon chosen here will be displayed next to the name of the workspace in the Navigate Menu and the workspace tab.



- **Custom CSS Classes:** Strings entered here become CSS classes on the body tag of the current workspace.
- **Browser's Window Title:** A string entered here becomes the browser tab label.



- **Home Destination Workspace:** Specifies the workspace the Home button should take the user to. The user can choose the Home Destination Workspace from the dropdown list.

URL Options



Note: These options are not commonly used in most installations of MediaBeacon.

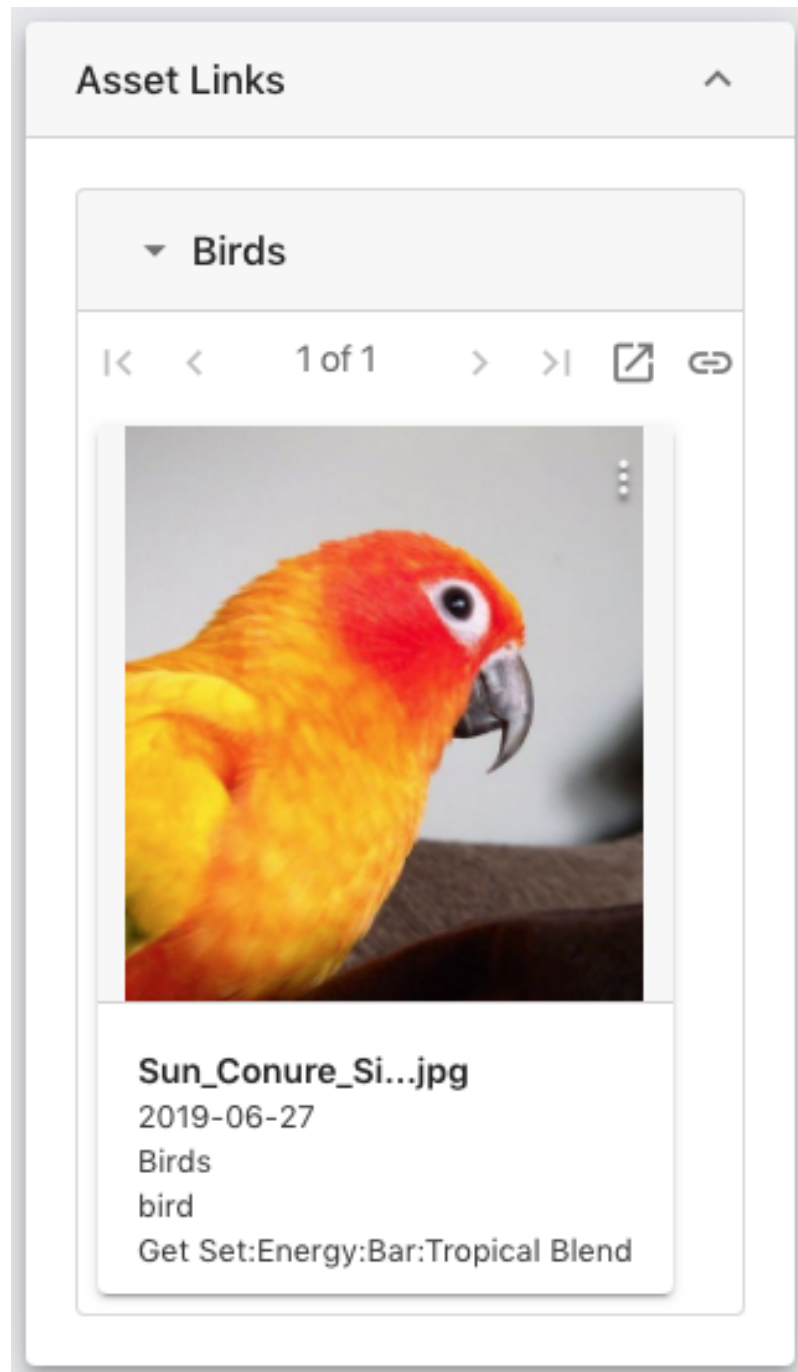
- **Custom URL for Workspace:** A string entered here acts as a redirect to the given workspace, for example: "<https://externaltraining2.mediabeacon.com/p/example>" might resolve to "<https://externaltraining2.mediabeacon.com/gwtmain/GwtMain.html#!MP;;p=464EBF9D-94E5-419B-A741-7EC76D9A2EE9;;par=0=1=50>". The custom URL does not function as a "vanity URL", the workspace's URL remains the same. Note that users who follow such a link cannot be shown workspaces to which their ACL's do not have access.
- **Custom Login URL:** A URL entered here will cause MediaBeacon to redirect the user to that URL with the user accesses MediaBeacon in a non-logged in state. This can be after logging out, but also connecting to MediaBeacon while not logged in. This behavior is dependant upon what workspace the user last used, which is stored in a browser cookie.
- **Custom Link URL for Emails:** A partial URL entered here can redefine the URL sent via email mechanisms in the system. This can be useful if your MediaBeacon instance has a different external DNS assignment then internal to your network.

Default Behavior Options

- **Zip Quick Downloads:** Enabled by default, this option sets the default behavior for Quick Downloads. When disabled, quick downloaded assets will be automatically decompressed, no ZIP file being left behind. **Note:** this behavior only pertains to the Quick Download function, not the Download function.
- **Set Default Download File Name:** When multiple assets are downloaded at once, they are combined into one ZIP file with the name "MediaBeaconFiles.zip". A string entered here changes this name for downloads from the workspace being configured.
- **Default Asset View Form:** A single Form may be designated as the default Form which will be expanded when the user opens the asset view. This Form can not be removed from the asset view, and will always be displayed when browsing to a new asset from within the asset view (using the next and previous buttons). Note: Although a global administrator may choose any Form for this field, the ACL's "Visible Forms" entries have precedence. The upshot being that if the Default Asset View Form is not in the ACL's Visible Forms list, it will not be displayed.
- **Default Asset View Tabs:** Multiple Forms may be designated as "default tabs". These Forms tabs will always be listed in the metadata panel of the asset view, and cannot be removed. Note: Although a global administrator may choose any Forms for this field, the ACL's "Visible Forms" entries have precedence. The upshot being that if a Default Asset View Tab is not in the ACL's Visible Forms list, it will not be displayed.
- **Required Forms for Upload:** One or more Forms may be chosen for this entry, becoming the upload Form used for all uploads in this workspace. This setting will supersede the ACL upload Form setting, and is overridden by upload Form settings in components. Component upload Form settings only pertain to uploads initiated by clicking or asset-dragging directly on that given component. The upshot is that the Create > Menu command's upload Form behavior can be controlled only with the ACL or workspace "Upload Form" setting. Of special note: Forms chosen

here are **NOT** restricted by the ACL's "Upload Form" setting; therefore a workspace can use an upload Form that is not otherwise visible to the user in asset view.

- **Fields On Asset View General Tab:** Fields chosen here are displayed at the bottom of the "General" tab in the asset view. At least one must be specified. Any field may be chosen, and is not limited to fields that the ACL has in any "Visible Form". Note: Adding a field here will make that field editable by the user, unless the user's Group "Edit Level" setting is lower than the given field.
- **Fields below Asset Link:** Fields chosen here will be visible in the asset preview pane of the "Asset Links" Form tab. Note: Adding a field here will make that field editable by the user, unless the user's Group "Edit Level" setting is lower than the given field.



Advanced JavaScript Options

The following areas allow JavaScript code (using MediaBeaconJavaScript API) to replace the function of certain actions in the interface.

Note that if these sections are turned off via the right-hand toggle button, the contents will be deleted.

- **Enable javascript on direct download:** Code entered here replaces the function of all download actions on a workspace, except those in the Notification Center.
- **Enable javascript in the asset view:** Code entered here replaces the function of opening the asset view.
- **Enable javascript on home button click:** Code entered here replaces the function of the home button. This is sometimes used to change this interface element to navigate to a specific workspace, rather than clearing search criteria.
- **Notification Center Options: Enable javascript on direct download:** Replaces the function of download actions in the Notification Center. Note that this includes conversion downloads that use the "Download on conversion complete" option in their Loading Dock conversion preset.

5.1.3. Using Workspaces

How to add, arrange and share workspaces.

This article deals with workspaces as arranged within ACLs. For "Manage Workspace" functionality, see [Manage Workspace Dialog](#) on page 85.

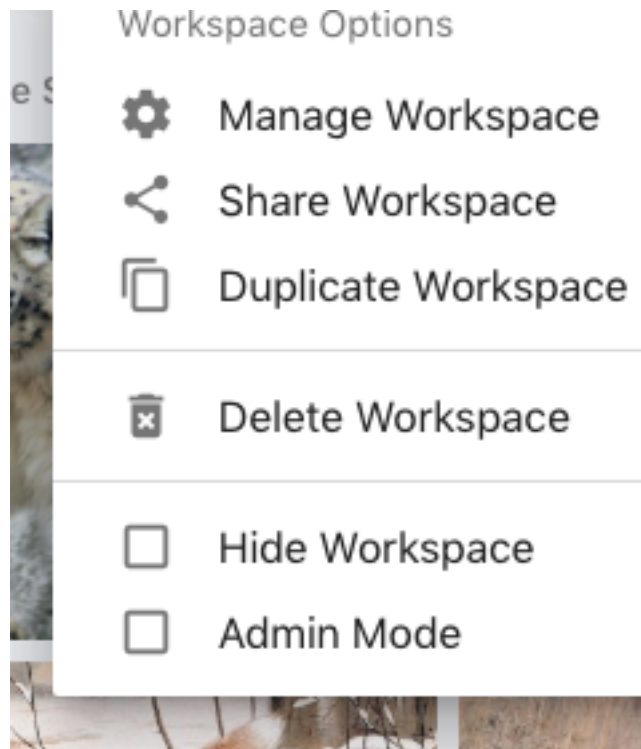
Workspaces Overview

Each ACL can contain a number of workspaces, each of which has a UUID that is displayed as part of the browser's URL. This UUID is always specifically tied to a given workspace. Identically configured workspaces will still be unique.

Workspaces can be shared between ACLs. A shared workspace contains the same components and settings wherever it appears. A change made to a workspace in one ACL will change it in all ACLs with which is it shared.

Workspace Options Contextual Menu

Administrator-Level users may use several commands in the Workspace contextual menu. It may be displayed in either of two ways:



Contextual Menu

1. Right-click any non-component, non-menu, or non-menu area
2. **Note:** this method does not require the user be in admin mode.

Selected Workspace Tab Gear Menu

1. Enter admin mode
2. Select the desired workspace tab
3. Left-click the gear icon in the highlighted workspace tab.

Non-Selected Workspace Tab Gear Menu

1. Enter admin mode
2. Left-click the gear icon in a non-highlighted workspace tab.

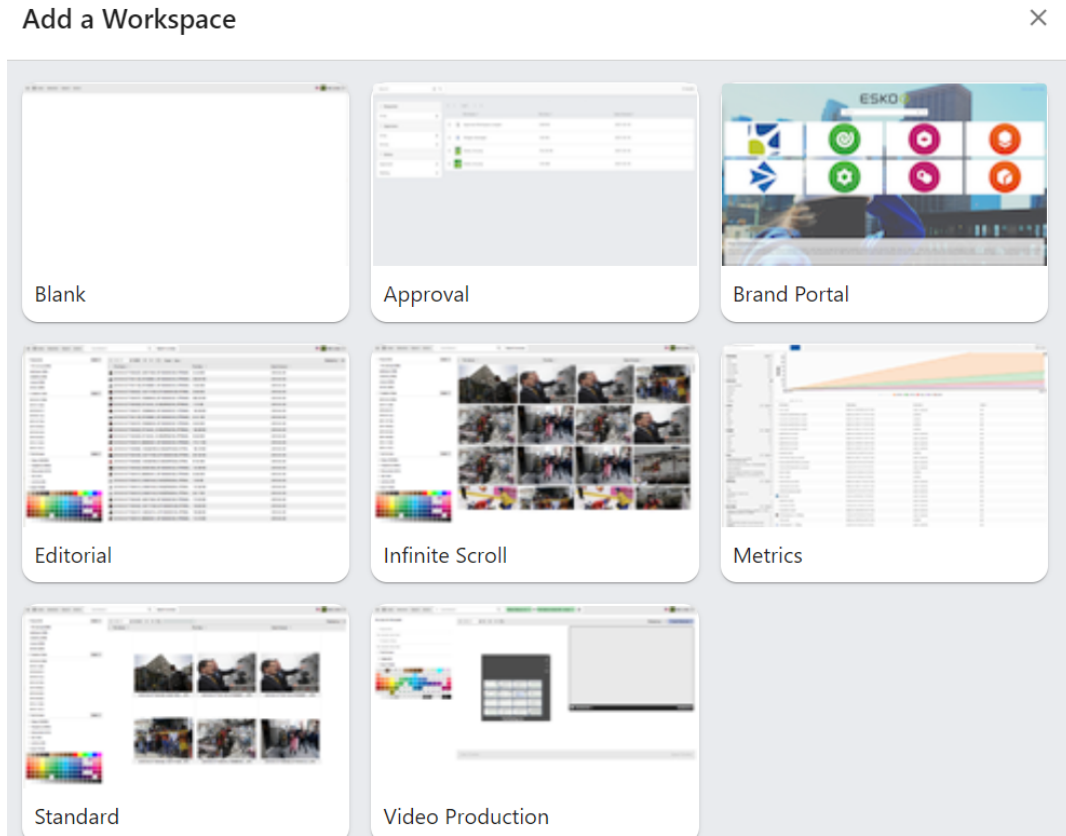
It contains the commands:

- Manage Workspace (absent in Non-Selected Workspace Tab Gear Menu)
- Share Workspace
- Duplicate Workspace (absent in Non-Selected Workspace Tab Gear Menu)
- Delete Workspace
- Hide Workspace
- Admin Mode

Adding Workspaces

Workspaces may be added by

1. Menu Bar > Manage > Workspace
2. Click **Add New Workspace** button below right, which opens the **Add a Workspace** dialog



The workspaces available here, except for the "Blank" option, are templates. The templates contain a set of components that are automatically shared between each added instance of that template.



Note: Using a template (other than "Blank") in the "Add a Workspace" dialog is analogous to duplicating a workspace using the "Duplicate as an asset, retaining component links" option. For this reason it is recommended to create new workspaces with only the "Blank" option, then adding and/or sharing components as necessary is recommended.

Each workspace added to an ACL is displayed in the Navigation Menu.

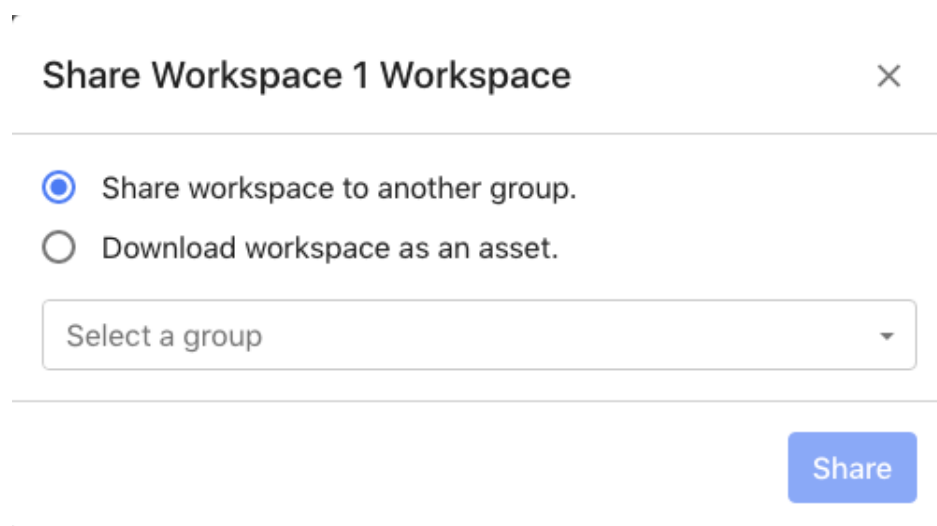
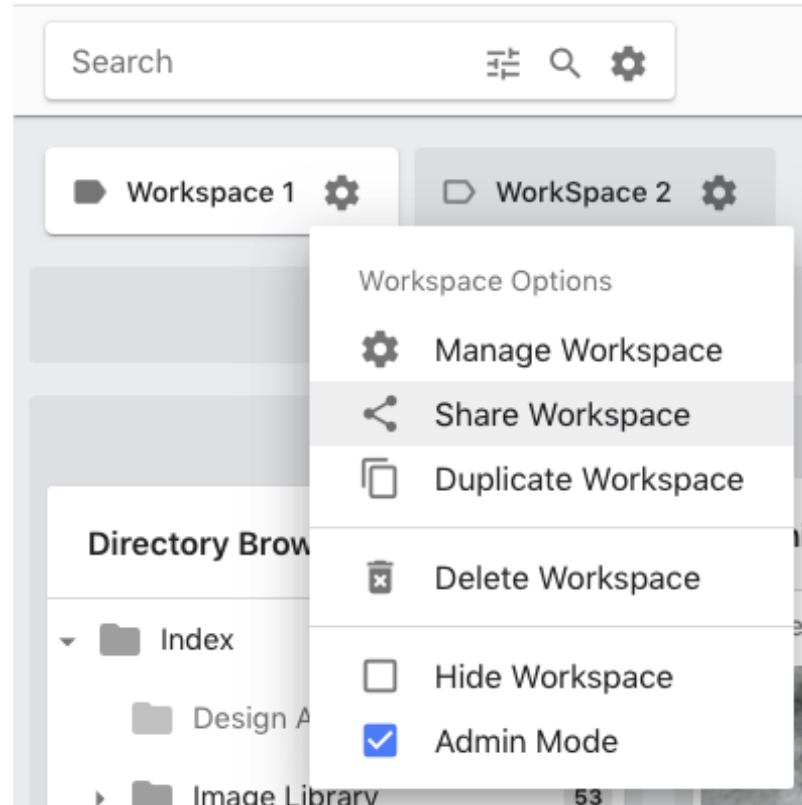
Sharing Workspaces and Duplicating Workspaces

Workspaces may be shared and duplicated.

- Sharing a workspace does not make additional workspaces, but rather gives another ACL access to the shared workspace.
- Duplicated workspaces are new workspaces that have the same settings as the original workspace at the time of the duplication.

Sharing

Workspaces may be shared in the "Share Workspace" dialog. To open this dialog, choose "Share Workspace" in the Workspace Options Menu.



1. Choose: "Share workspace to another group" Selecting this option allows the admin to choose a group.
2. A list of ACLs is shown for the chosen group.

3. If the group has only one ACL, as is common, it will automatically be selected.
4. Once an ACL is selected, the admin may click "Share", and the workspace will be accessible to the specified ACL.
5. INFO CALLOUT: When a workspace is shared with an ACL with currently logged in users. The shared workspace will not be accessible to them until they logout and log in again.

The "Download workspace as an asset" option is discussed below.

Duplicating

Duplicating a workspace always assigns a new UUID to the duplicate, and may be done in 3 ways:

- Duplicate in the current ACL, retaining component links
 - Usage: Often used for creating duplicate workspaces that might have a handful of different components between them.
- Duplicate as an asset, retaining component links
 - Usage: Often used for making templates that will inherit the current settings of extant components when used.
- Duplicate as an asset, **not** retaining component links.
 - Usage: Often used for making independent, non-linked workspace templates.

The "component linking" function is discussed in detail in the Component Linking and Component ID section. To summarize this feature: Component linking allows components with identical "Component IDs" to share the same configuration.

Duplicate a workspace in the current ACL, retaining component links

1. Select the "Duplicate Workspace" command from the workspace contextual menu.
2. Workspace is duplicated with the same label, new UUID and linked components

Duplicate a workspace as an asset, retaining component links

This option will save the current workspaces as an asset (.xmpper file). It is first downloaded by the admin's browser, and must be re-uploaded into MediaBeacon to be used.

To create an .xmpper asset.

1. Open the "Share Workspace" dialog.
2. Choose the "Download workspace as an asset" option.
3. **Enable** the "Preserve Component Links" checkbox.

Share Workspace 1 Workspace
×

Share workspace to another group.
 Download workspace as an asset.

Workspace 1

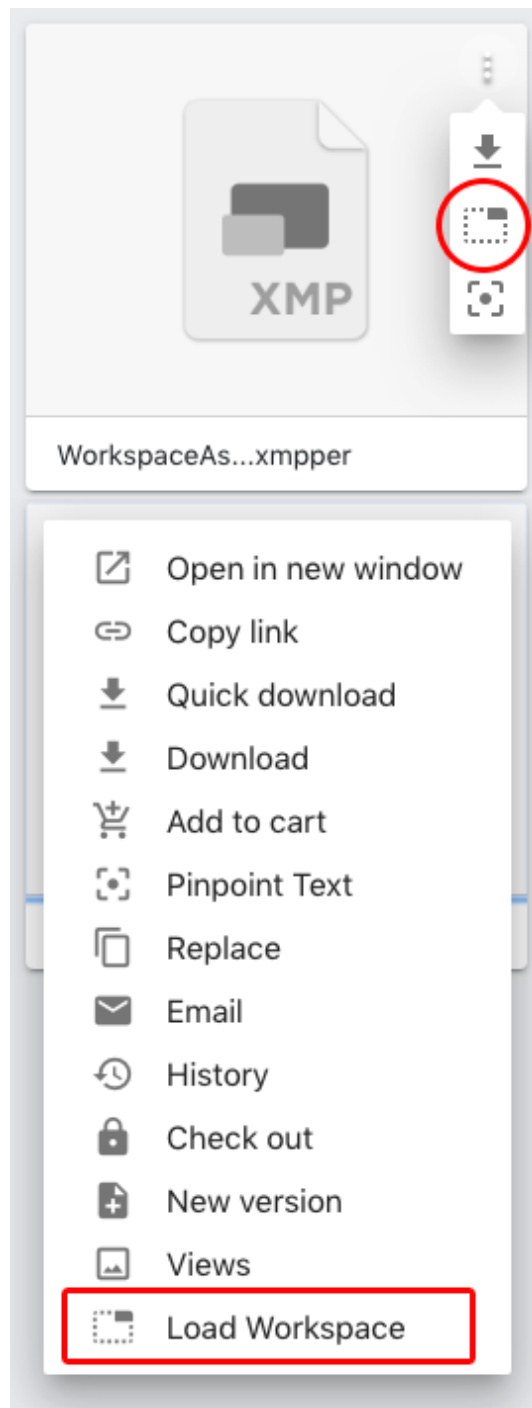
Preserve Component Links

Download

4. A name field will be shown, allowing the admin to change the name of the downloaded asset
 - a. **Note:** Spaces in the string will be replaced with "+" characters upon download.

To use a .xmpper asset.

1. Upload the .xmpper asset into MediaBeacon
2. Select the "Load Workspace" command in the .xmpper asset's contextual menu or asset menu



3. In the "Import Workspace" dialog, confirm.
4. The workspace will be added to the current ACL. **Note:** The name of workspace will be taken from the .xmpper's file name.

Duplicate a workspace as an asset, not retaining component links

To create a .xmpper with non linked components, use the instructions above but disable the "Preserve Component Links" checkbox.

Deleting Workspaces

This command deletes the current workspace from the current ACL. If the workspace is not shared with another ACL, it and any unshared components are permanently deleted.

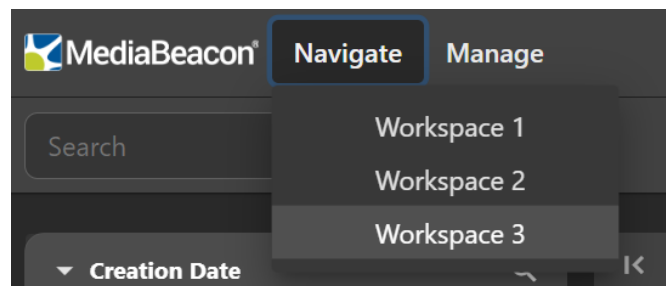
Hide Workspace

Choosing this setting has two effects, hiding the workspace in

1. Hiding the workspace in the Navigation menu.
2. Hiding the workspace from any users not in admin mode.
 - a. Admin-level will still have access to the workspace in admin mode.

Arrangement of Workspaces

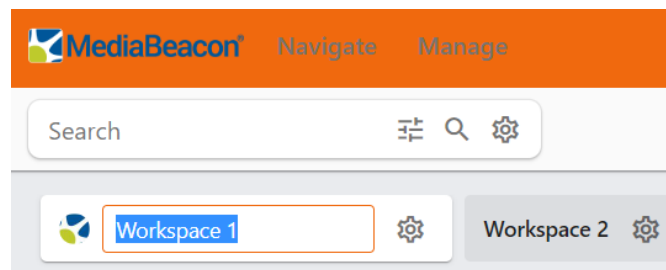
An ACL's workspaces are shown in the Navigate menu, and as workspace tabs while in Admin Mode. These tabs may be dragged and dropped to rearrange their order in the Navigate menu; tabs arranged left-to-right translate to top-to-bottom.



The upper-leftmost tab position is special, being the workspace that the given ACL will view first by default.

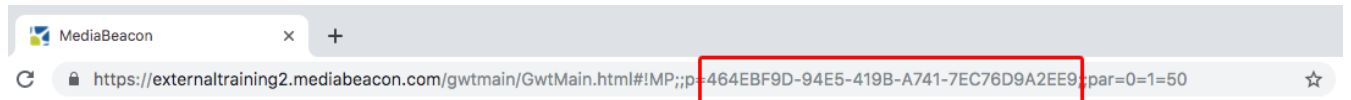
Workspace Names

Workspace names may be changed while in admin mode by double-clicking the name in the workspace tab.



This will change the name of the tab in the Navigate menu and other admin interface elements.

It is important to remember that workspace names are only labels that are specific to only the current ACL. Each workspace has a UUID that is MediaBeacon's identifier for that workspace. If a workspace is shared with another ACL, and its name is changed, the change will **not** be reflected in the other ACL. The UUID number of the workspace, however does not change.



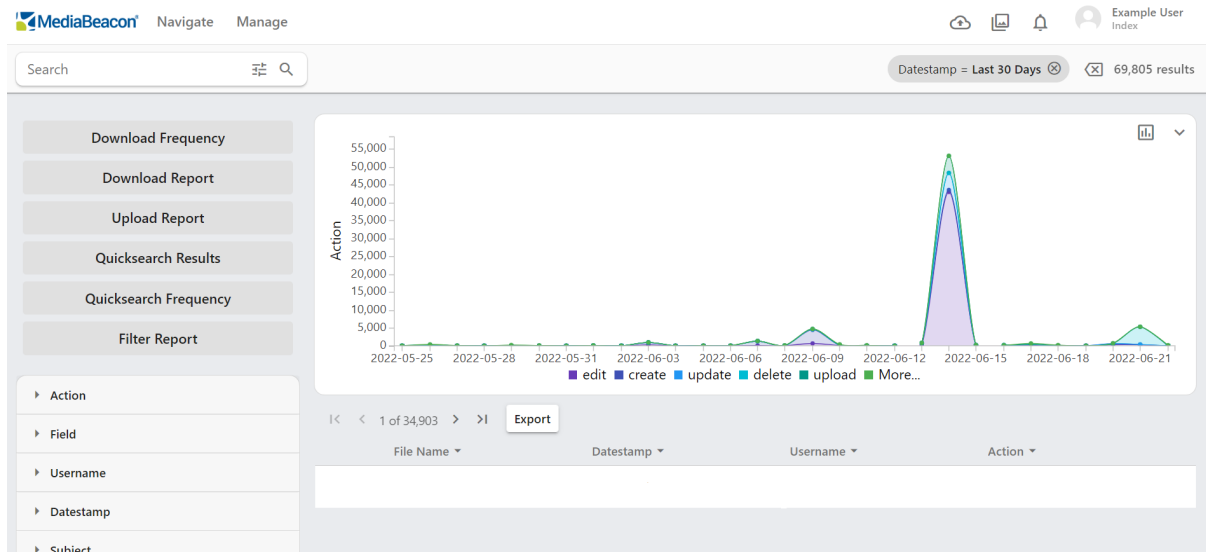
Note: Capitalization changes to name strings will not be saved. For example, if the workspace "WorkSpace0" is changed to "Workspace0", that change will not be saved. If another character is added, such as a space ("Workspace 0"), the name will be saved.

5.1.4. Admin Only Menu Commands

The availability of these commands to Global Administrator level users are dependent on the ACL permissions.

1. Menu Bar > Manage:
 - a. Workspace: Opens the Manage Workspace dialog. Users can add new workspaces by selecting Add New Workspace button in the down-right corner.
 - b. History: Opens the "History" dialog.
 - a. Use of this command is granted to non-admin users when the "View Global Asset Log" permission restriction is not set in user's current ACL.
 - c. Dictionaries: Opens the "Dictionary" dialog.
 - a. Use of this command is granted to non-admin users when the "Administer Dictionaries" permission restriction is not set in user's current ACL.
 - d. Workflow: Opens the "Workflow Manager" dialog.
 - e. R3Search: Opens the "R3Search" dialog.
 - f. System Status: Opens the "System Status" dialog.
 - g. Configuration: Redirects the user to the "Admin Core" interface.
 - a. **Note: This interface can be opened as a separate tab.**
2. Contextual Menu and Asset Menu, when used on a .mbwidget or .xmpper asset.
 - a. "Load Component"
 - b. "Load Workspace"

5.1.5. Metrics Component and Workspace Template



The Metrics Component, used to display system usage data, is unique in that it will significantly alter the function of other components. When included on a workspace, other components no longer manipulate individual assets, but instead will display records of actions that have occurred in the system.

For this reason, MediaBeacon has a preset Metrics Workspace template under **Manage > Workspace > Add New Workspace**. This interface includes the Metrics component as well as the Filter Search, Facet Graph, Quick Search and Search Status components. An HTML Component with several preset Report Buttons are also included.

This workspace is used to filter and display the same events recorded by the "History" (Aka Global Asset) Log. This includes events to assets but also events that have no asset associated with them, such as Log In events.

The Metrics workspace will display the total number of actions that occurred during a particular time frame. By default, Metrics workspace displays Metrics assets with 30 days date stamp on the View Component.

Adding a Metrics Workspace

To add a new Metrics workspace, choose from the Menu Bar:

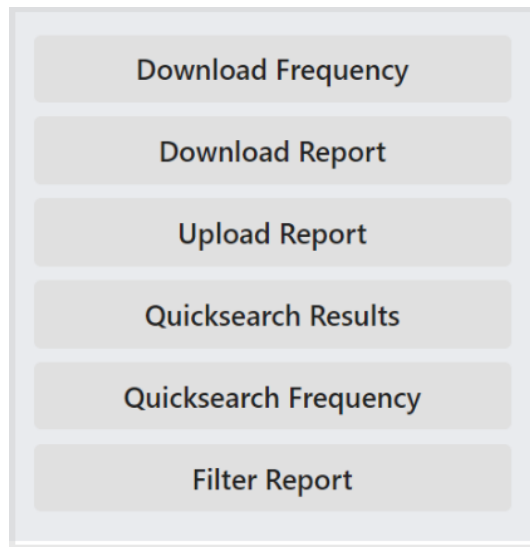
1. Manage > Workspace. The Manage Workspace page opens.
2. Click Add New Workspace button from below.
3. Choose Metrics workspace option.

This command creates a Metrics workspace containing the default Filter Search, Metrics View, HTML component with Reports option, and a List View component.

Metrics Workspace Interface Overview

If a Metrics Workspace template is added to an ACL, the user with access to that ACL is logged in, the user can access Metrics workspace via **Navigate > Metrics**.

Report Buttons



The Metrics workspace's HTML component has several preset usages reports the user may view or download.

- **Download Frequency:** Downloads a CSV report of the number of times an asset has been downloaded.
- **Download Report:** When the user clicks on the Download Report button, the Metrics View displays a graph showing the number of downloads occurring over the span of 30 days and the List View component displays all the Metrics assets which were downloaded within 30 days.
- **Upload Report:** Displays the number of uploads occurring over the time span of 30 days along the Metrics assets.
- **Quicksearch Results:** Downloads a CSV report of Quick Searches made by different users in different ACLs and groups along with the date and time of the search.

	A	B	C	D	E	F
1	Search Term	Search Results	ACL	Group	Date Performed	
2	"new_test"	14	myacl	mygroupmb	#####	
3	"sales buddy"	1	kzgroup	kzgroup	#####	
4	"test_new"	13	myacl	mygroupmb	#####	
5	.3d	2615	subby	users	#####	
6	.ai	23	index	users	#####	
7	.docx	0	kzgroup	kzgroup	#####	
8	.gif	46	myacl	mygroupmb	#####	
9	.indd	7	subby	users	#####	
10	.jpeg	266	index	users	#####	

- **Quicksearch Frequency:** Downloads a CSV report of the frequency of Quick Searches made.

	A	B	C	D	E	F
1	Search Term	Search Results	ACL	Group	Date Performed	
2	.3d		1 subby	users	#####	
3	.ai		2 index	users	#####	
4	.docx		1 kzgroup	kzgroup	#####	
5	.gif		1 myacl	mygroupm	#####	
6	.indd		2 subby	users	#####	
7	.jpeg		1 index	users	#####	
8	.jpg		2 index	users	#####	
9	.mov		3 index	users	#####	
10	.mp4		2 myacl	mygroupm	#####	

- **Filter Reports:** Downloads a CSV report of each field with its value in different ACLs and groups along with the Datestamp.

	A	B	C	D	E	F	G
1	Field	Value	Search Res	ACL	Group	Date Performed	
2	http://mediabe //brightech.com		1 mb docum	documentation	#####		
3	http://mediabe //mediabeacon		1 myacl	mygroupmb	#####		
4	http://mediabe //mediabeacon		1 myacl	mygroupmb	#####		
5	http://mediabe //ns.adobe.com		1 myacl	mygroupmb	#####		
6	http://mediabe //purl.org/dc/el		1 myacl	mygroupmb	#####		
7	http://mediabe	0	3 myacl	mygroupmb	#####		
8	http://mediabe	5.00E+20	1 subby	users	#####		
9	date_entered	00z+1day-1milli	1 index	users	#####		
10	http://ns.adobe	00z+1month-1n	2 kzgroup	kzgroup	#####		

Different values in the Quick Search report:

- Search Term
- Search Results
- ACL
- Group
- Date Performed

Different values in the Filter Search report:

- Field
- Value
- Search Results
- ACL
- Group
- Date Performed

Metrics View Component

- Switch Graph Type: Users can toggle between the types of graphs i.e., line graph and bar graph by clicking Switch Graph Type icon.

Figure 11: Line Graph View

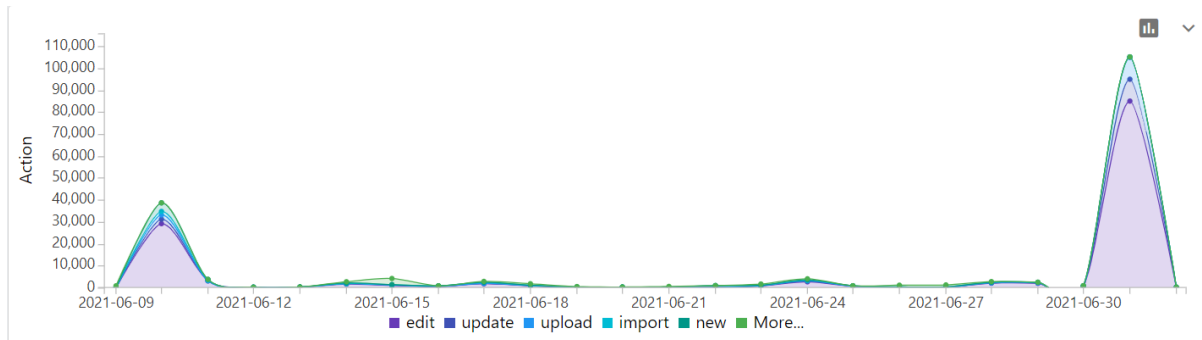
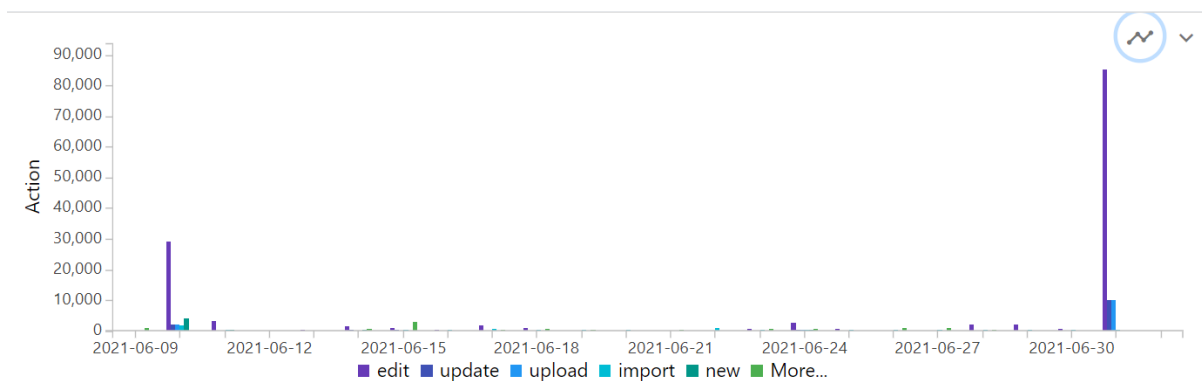
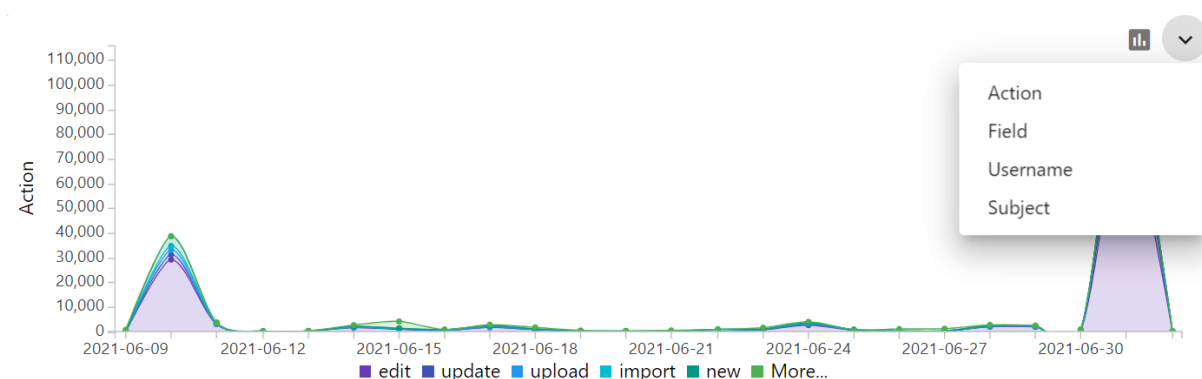


Figure 12: Bar Graph View

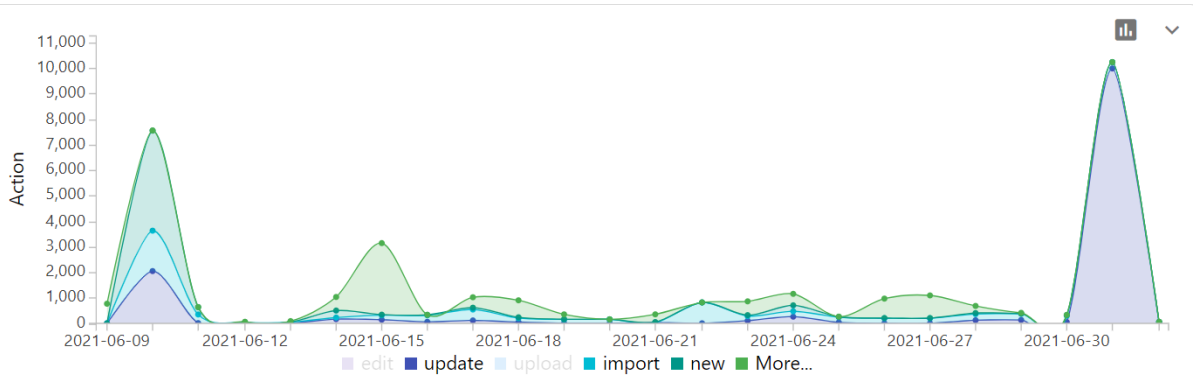


- Field Switcher: Users can select between different facets present in the workspace’s Filter Search using this dropdown. Selecting a value here toggles a field’s “Stack Graph” button in the Filter Search.

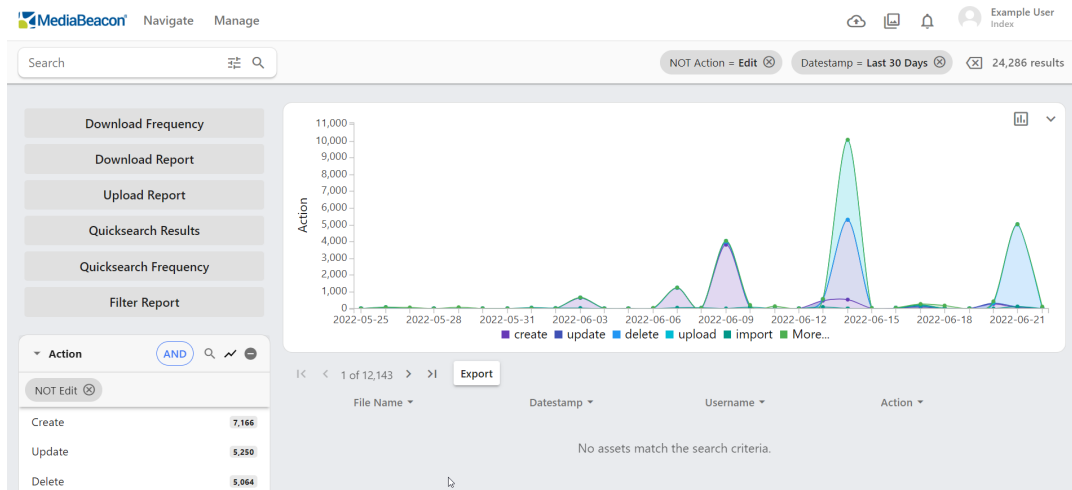


- X- Axis Values:
 - The values shown here are the values present on one of the currently selected field, i.e., Action.

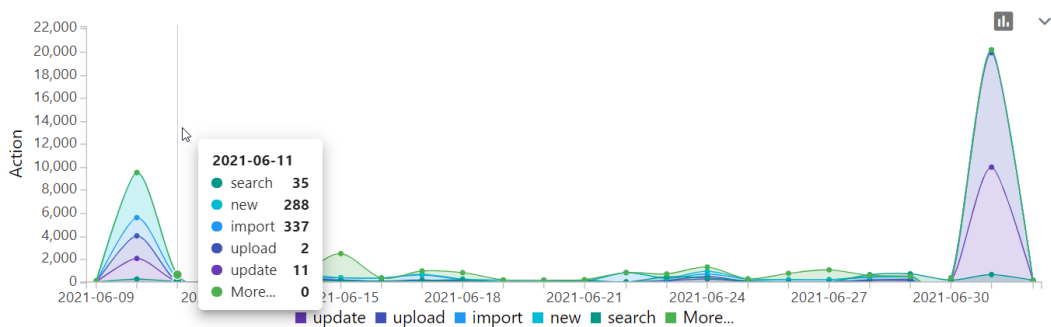
- Other values which are not categorized are consolidated as More. Here in this graph, further actions other than the currently displayed are shown as More.
- Toggling Values from the graph: Click on the values along the X-axis to exclude them from the graph,

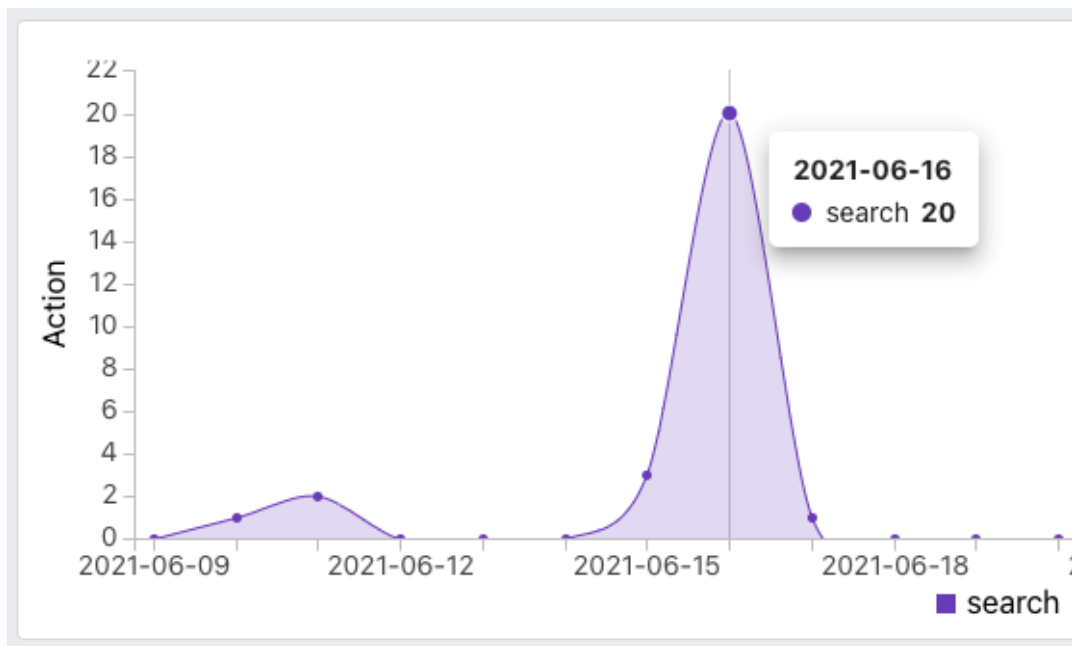


or else shift-click them in the Filter Search. The values will be removed and will display grayed-out:



- View Specific values: Hover over the graph to see specific values:





Filter Search on a Metrics Workspace

Users can alter the Metrics View graph and Metrics Assets displayed in the List View using the Filter Search fields.

On a standard Metrics workspace, the Filter Search is pre-populated with the following fields:

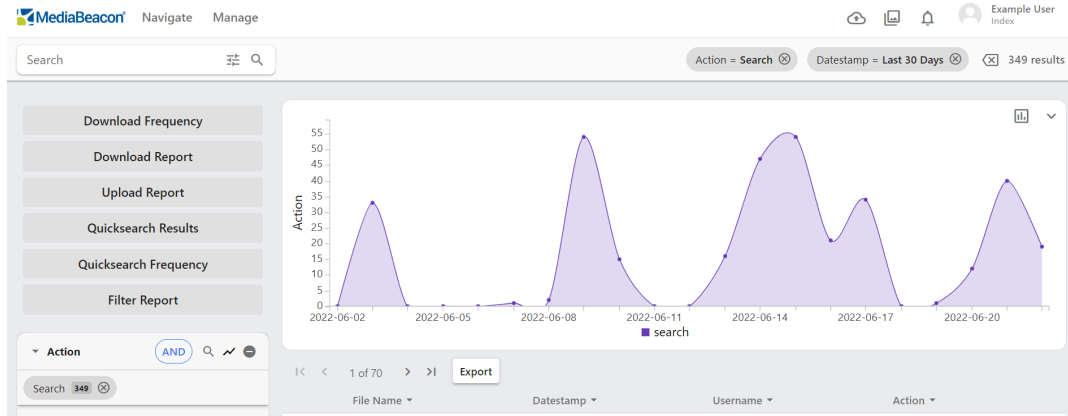
- **Action:** Values in this field represent the type of action that the system recorded.
- **Field:** Values in this field represent the XMP field that was acted upon, if applicable.
- **Username:** Values in this field represent the user who performed the action, if applicable.
- **Datestamp:** Records each event's date/time.
- **Subject:** Values in this field represent an additional piece of information that pertains to a given action. For example, "Edit" actions may have their subject be "Field" or "Asset". The "Create" action on the other hand can have values that include "Field", "Selection", "Comment", "PDF", and more.

When a value on any of these fields (except Datestamp) is selected, that value is displayed in the Metrics View. The graph will be a single line displaying the number of times the selected value has been executed.

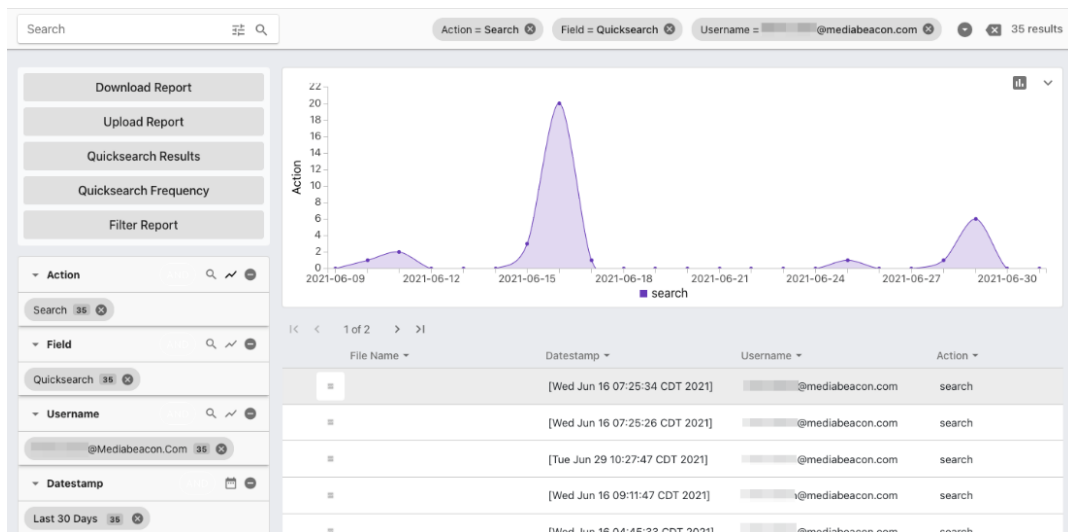
The screenshot shows the MediaBeacon interface with a search filter applied to 'delete' actions. The metrics view graph shows a single line for 'delete' actions, starting at 0 in early 2022 and rising to approximately 5,000 by mid-2022. The left sidebar contains various report options, and the bottom section shows the filter configuration for 'Action = Delete' with 5,064 results.

Choosing a Datestamp value will filter the other chosen value over the specified timeframe.

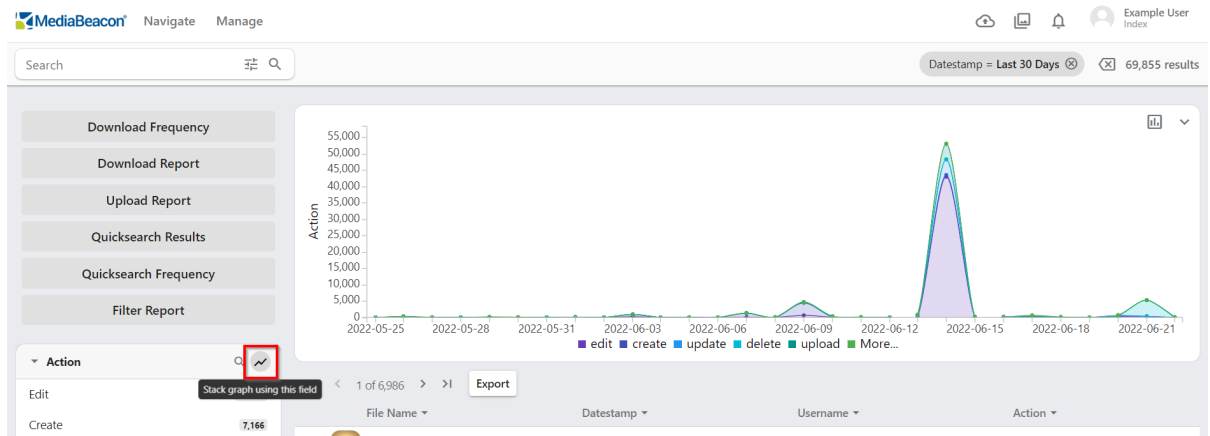
For example, when “Search” under the Action field is chosen, as well as “Last 30 Days” under Datestamp, the graph will show the frequency of that action over that time period.



As such, these results show all the searches performed by all users of the system, across all fields. This may be further refined by choosing other values. In this case, “Field” will show types of Search, rather than specific fields searched upon.



- Stack Graph Button:** When the user clicks on the stacked graph icon to the left of a given field in the Filter Search, the Metrics component displays a “stacked graph”, multiple values being shown at once on that field. Where each value is represented by an overlapping line.



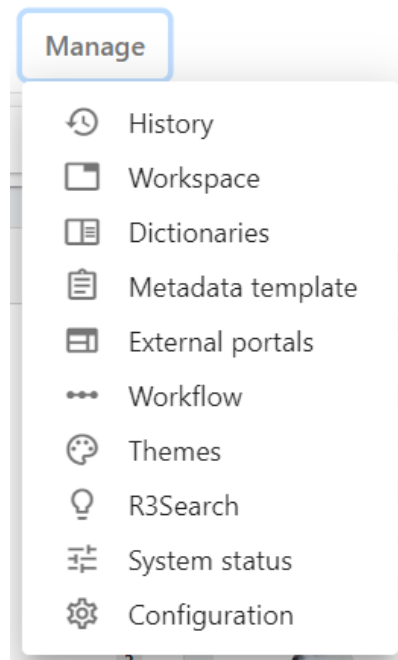
Note: Previously, when users play a .gif file, MediaBeacon shows the metrics as a download. From 22.07, a new action filter is added to the Metrics workspace called the **Play**.

MediaBeacon Metrics Fields

- ACL Name: (http://mediabeacon.com/ns/metrics/1.0/ acl_name)
- Action: (http://mediabeacon.com/ns/metrics/1.0/ action)
- API Key Username: (http://mediabeacon.com/ns/metrics/1.0/ apikey_user_name)
 - **Note:** Not currently populated
- Asset ID: (http://mediabeacon.com/ns/metrics/1.0/ asset_id)
- Datestamp: (http://mediabeacon.com/ns/metrics/1.0/ datestamp)
 - **Note:** Cannot be displayed as a stack graph itself, but used to limit the scope of graph data.
- Deleted: (http://mediabeacon.com/ns/metrics/1.0/ deleted)
- Elapsed Time: (http://mediabeacon.com/ns/metrics/1.0/ elapsed_time)
- Field: (http://mediabeacon.com/ns/metrics/1.0/ field)
- Group Name: (http://mediabeacon.com/ns/metrics/1.0/ group_name)
- New Value: (http://mediabeacon.com/ns/metrics/1.0/ new_value)
- Old Value: (http://mediabeacon.com/ns/metrics/1.0/ old_value)
- Path: (http://mediabeacon.com/ns/metrics/1.0/ path)
- Subject: (http://mediabeacon.com/ns/metrics/1.0/ subject)
- Username: (http://mediabeacon.com/ns/metrics/1.0/ user_name)

5.2. Administrator Menu Commands

Administrator-only options in the Manage menu.



Note: Dictionaries, Metadata Template and External Portal options are available for the users in the Manage menu.

5.2.1. History Dialog

Refer [History Dialog](#) on page 77 for more details.

5.2.2. Dictionaries Dialog

This section is covers different Dictionary fields and functions.

Dynamic Dictionary Fields

This feature allows a single dictionary to control a set of interdependent fields; these fields in turn will be able to filter and automatically auto fill other fields controlled by that dictionary.

A Dynamic Dictionary is a new type of dictionary that is required to enable this functionality. In contrast to a normal MediaBeacon dictionary, it has an arbitrary number of columns, each of which represent (and will be linked to) a different field.

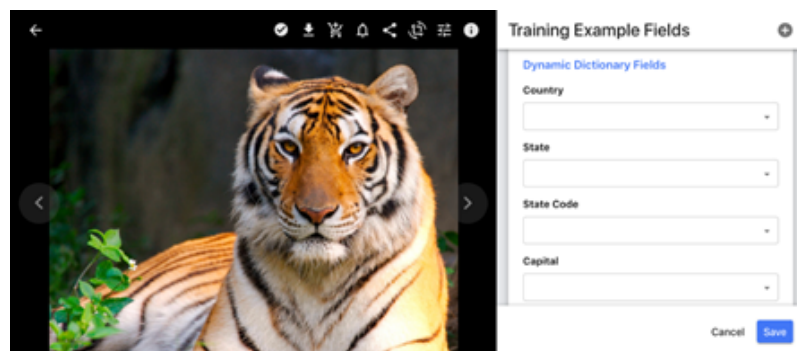
Figure 13: Regular MediaBeacon dictionary

JUWI Dictionary			
Training Example			
Image	↑ Words	Synonyms	Thesaurus
	bluebird		New
	bluejay		
	cardinal		
	chicken	pullet, roaster	
	condor		

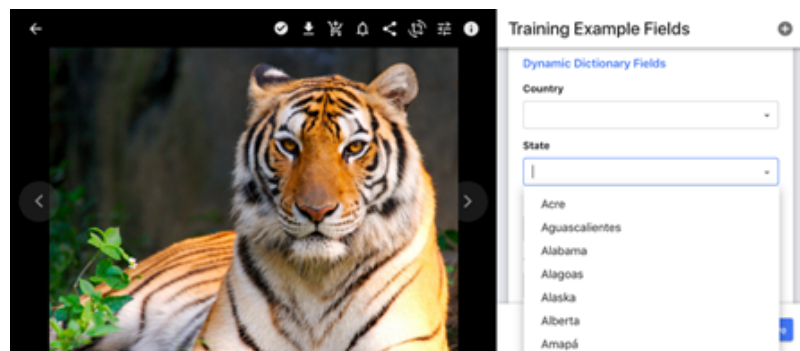
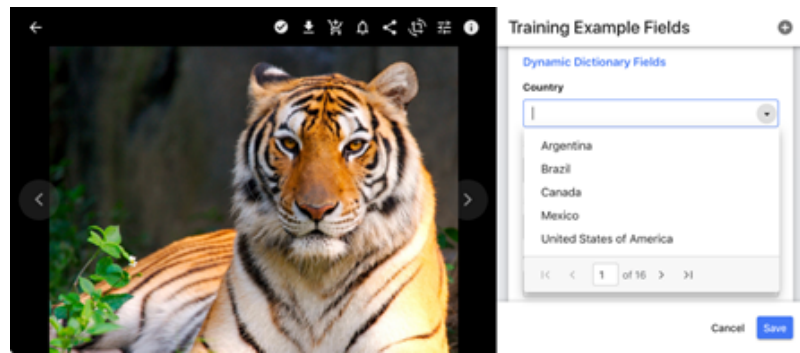
Figure 14: Dynamic Dictionary

ztr_Dynamic_Geography			
Training Example			
↑ Country	Geographical Region	Geographical Region Code	Capital City
Argentina	Santiago del Estero	SE	Santiago del Estero
Argentina	Tucumán	TM	San Miguel de Tucumán
Brazil	Acre	AC	Rio Branco
Brazil	Alagoas	AL	Maceió
Brazil	Amapá	AP	Macapá

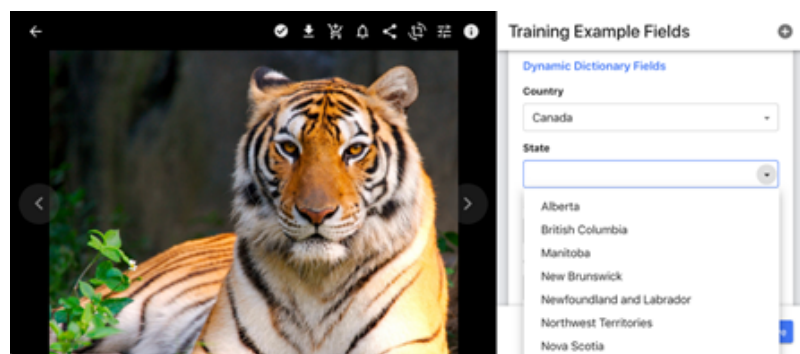
When Dynamic Dictionary fields are used in the same Form, they automatically become reactive to the state of other fields that share that dictionary. In this example, the "ztr_Dynamic_Geography" dictionary's columns are mapped to four Form Fields.



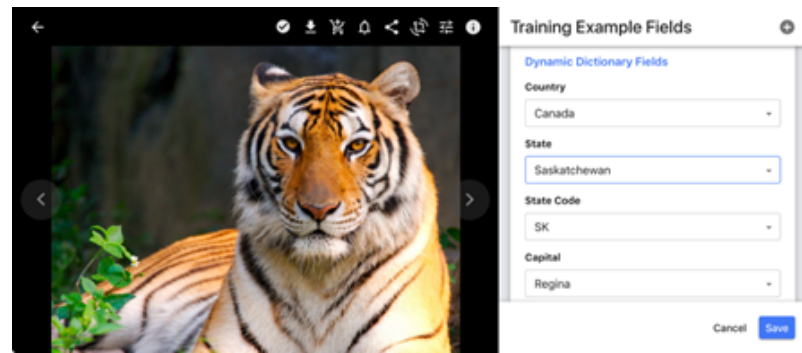
When a user uses the dictionary pulldown for a field, only unique values are shown.



Fields are dynamic in two ways. First, for example, when a user chooses “Canada” the values in “State” become limited to only those provinces in Canada.



The second dynamic behavior occurs when other field values within the set of dynamic fields are chosen enough to narrow values down enough so that there is only one possible choice, those values will be automatically filled. For example, if “Saskatchewan” is chosen, the values for State Code and Capital are filled in, as there are no other logical choices.



It is worth noting that specific behavior of the fields is dependent upon the disposition of the attached Dynamic Dictionary.

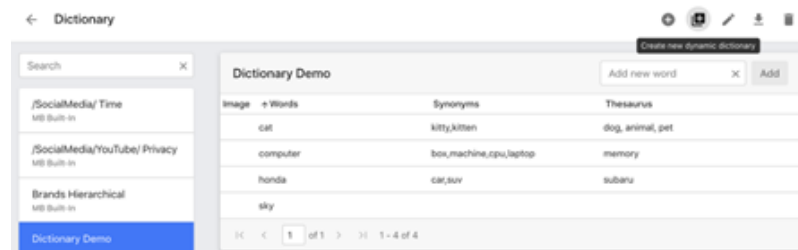
Both behaviors are not explicitly “top-down” in terms of hierarchy (as hierarchical dictionaries are), being instead based upon term frequency in the dictionary. See the Dictionary Configuration section for more information.



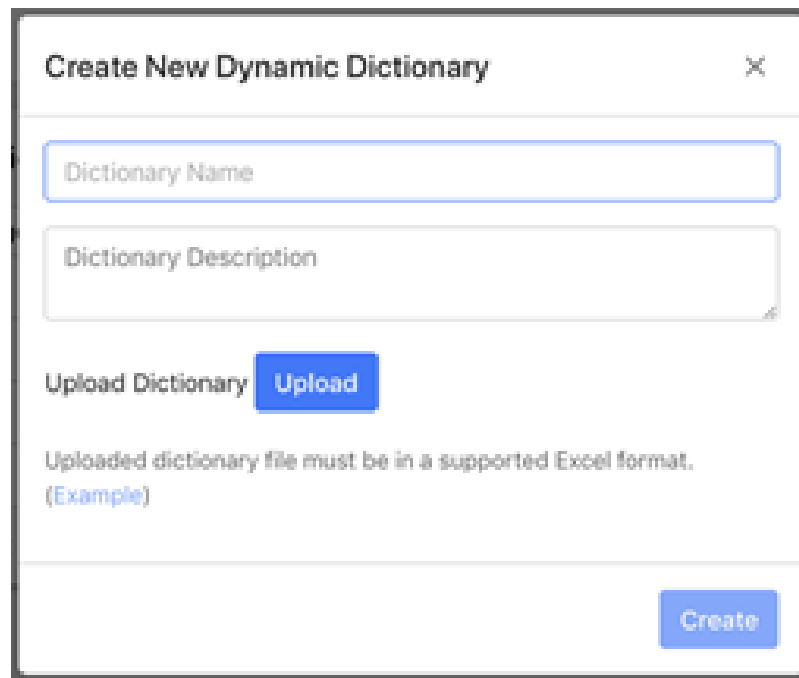
Note: When a user edits a term in a Dynamic Dictionary, all the assets that had the original term will be automatically updated to the new value. The feature is similar to normal Dictionaries.

Dynamic Dictionary Configuration

1. To create a Dynamic Dictionary, click the “Create new dynamic dictionary” button



2. This button opens the “Create New Dynamic Dictionary” dialog:



Here the user can enter the Name and Description for the new dictionary, as well as upload a dictionary from an external file.

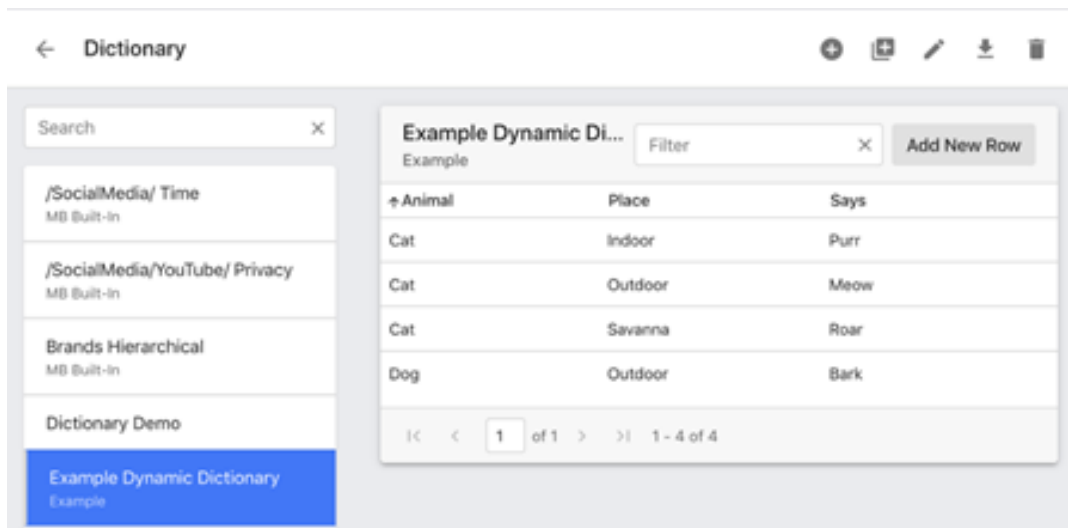
IMPORTANT NOTE: The format for Dynamic Dictionaries is NOT in a native Excel format, but in CSV. It is very important that no XML or XLS file is uploaded. When the above example is downloaded, it is a CSV file.

A correctly-configured dynamic dictionary input file looks like this:

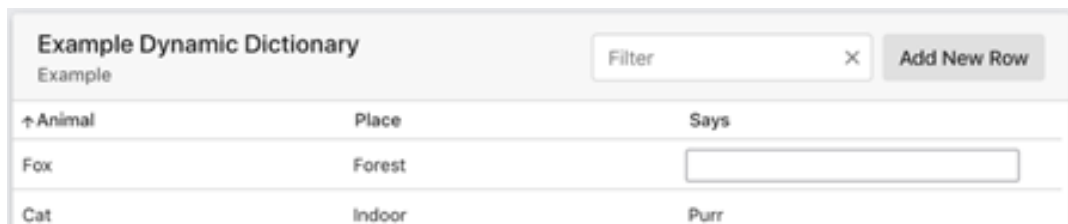
example_dynamic_dict.csv

```
Animal,Place,Says
Cat,Outdoor,Meow
Cat,Indoor,Purr
Cat,Savanna,Roar
Dog,Outdoor,Bark
```

When this file is used to create a Dynamic Dictionary, the following is created:



Individual rows may be added by clicking the “Add New Row” button, and filling out a value for each column.



- Columns can only be added when uploading a dictionary input file.

Filter Search

The user can search the dictionaries using the **Filter Search** field next to Add New Row button. Type-ahead configuration in the Filter Search, which provides a predictive list of terms based upon user’s text entry The user can sort the words in ascending and descending order using the arrow next to each field.

Dynamic Dictionary Best Practices

There are three major information theory paradigms for creating a Dynamic Dictionary.

- Chained Terms: Each value on a row of values will be unique, occurring on no other row or column.

Card Type, WidthMM, HeightMM, WidthIN, HeightIN

Poker, 63.5, 88.9, 2.5, 3.5

Micro, 31.75, 44.45, 1.25, 1.75

- Semi-Chained: Some values may be repeated, but these imply no hierarchy in information on each row.

Animal, Place, Says

Cat, Outdoor, Meow

Cat,Indoor,Purr

Cat,Savanna,Roar

Dog,Outdoor,Bark

- **Implied Hierarchy:** Arbitrary terms may be used to build a taxonomic (nested) hierarchy. This is done by using each column to define "clades" of values that describe ever increasingly specific description.

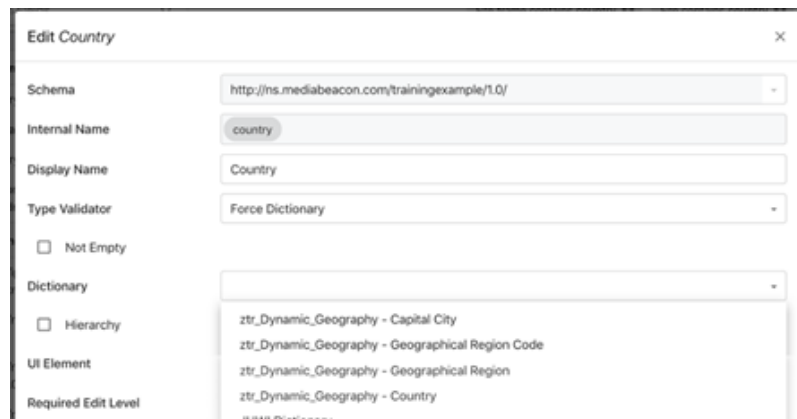
Common Name, Domain, Kingdom, Phylum, Class, Order, Suborder, Family, Subfamily, Genus, Species

Domestic Cat, Eukaryota, Animalia, Chordata, Mammalia, Carnivora, Feliformia, Felidae, Felinae, Felis, F. catus

Dynamic Dictionary Field Configuration

Once a Dynamic Dictionary has been set up, fields will need to be configured to take advantage of this dictionary.

When a Dynamic Dictionary is created, the Edit Field dialog will show a list that dictionary not as a single entry, but split into as many sub-dictionaries as there are columns in the Dynamic Dictionary.



To make use of these sub-dictionaries, create and configure a field to correspond to each of them. Note that these dictionaries are not hierarchical, and that checkbox must remain **unchecked**.

The recommended configuration for Dynamic Dictionary fields is Type Validator: "Force Dictionary" & UI Element: "String". Multi-value fields are not supported, so any of the Type Validator's "Comma Separated" formats are incorrect configuration.

Form Configuration

As always, in order to use fields, they must be included on a Form. This is no different than adding any other fields to Forms, and they can be arranged in any order, as there is no explicit hierarchy insofar as fields themselves are concerned.

It is worth noting that, as always, with MediaBeacon Forms, the property settings of a field can be abstracted from its "base" settings in the Edit Field dialog. So, one option for configuring Dynamic Dictionary fields is to change the Type Validator and dictionary assignment in the Form itself to allow fields to use the Dynamic Dictionary functionality without changing base field

configuration. If used in this fashion, be sure to only use fields configured as Type Validator: String and UI Element: String

5.2.3. Workflows

Workflows are customizable scripts that can be run in MediaBeacon and allow interfacing directly with the MediaBeacon API. They can be scheduled, run upon certain actions, or triggered manually to perform a virtually endless list of tasks.

Workflows can be entered and edited in the Workflow Manager, which is accessible from the menu bar option: **Manage > Workflow**.



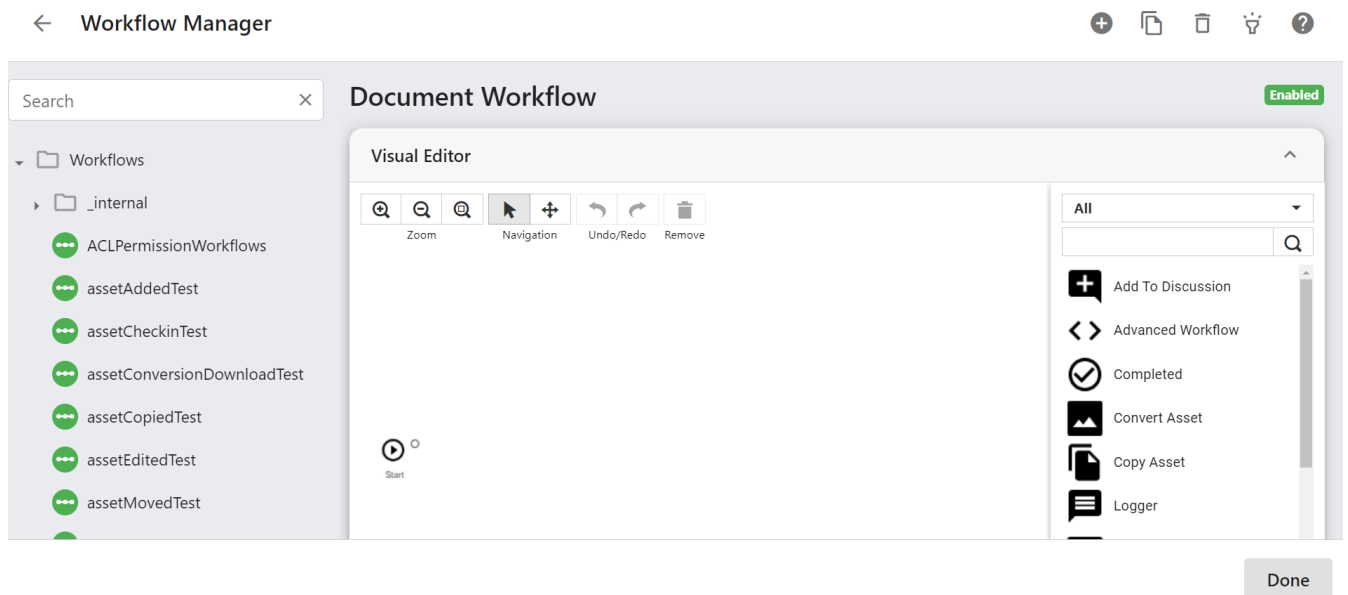
Note: To attend a training course on MediaBeacon’s API, please get in touch with the MediaBeacon representative to learn more.



Note: Refer to the section Workflow Javascript API in [MediaBeacon API Documentation](#).

Workflow Manager Dialog

Workflow Manger lists all the workflows and the folders. Users can select any Workflow by clicking. This opens the Workflow Editor.



Creating and Editing Workflows

A workflow may be edited by selecting it from the list. The panel on the right shows the editable options. All workflows are stored in the asset repository as .xmpwf files located in **Renditions \Workflows**.



Note: The workflows in green and grey are enabled and disabled respectively.

Workflow Editor Actions

- **Create workflow or Folder:** Opens the Create Dialog.
- **Search Filter:** Allows to search a workflow by entering a string.
- **Copy:** Workflows can be copied by first selecting the workflow from the list and then clicking Copy.
- **Delete:** Workflows can be deleted by first selecting the workflow to be deleted from the list and then clicking the Delete option.
- **Enable Workflows:** All existing workflows may be enabled by clicking the Enable All button.
- **Open Documentation:** This button will open a new tab that contains packages and classes that may be used in the workflow.
- **Rename:** Double-click on a workflow to rename.

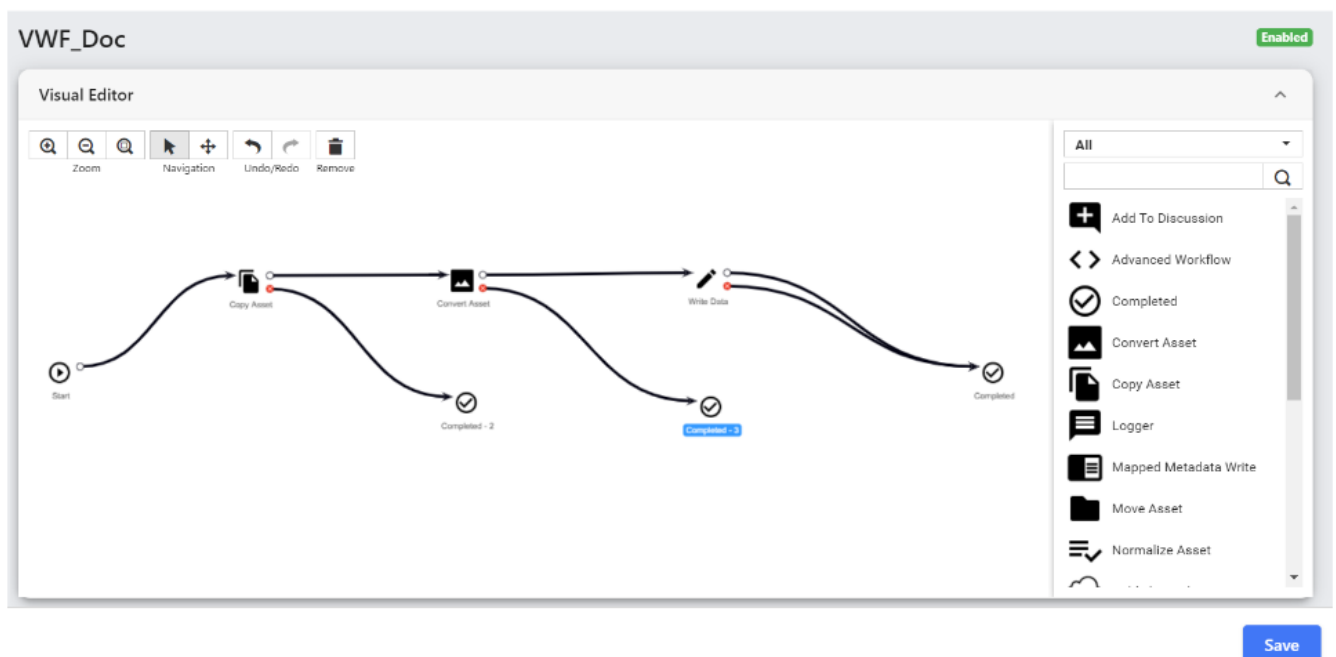
To Create a Workflow/Editor:

Click the Create workflow or Folder icon from the top right action buttons list. This opens the Create dialog.

- **Name:** Enter the name of the workflow/folder.
- **Type:** Select the type of workflow or the folder. There are two types of workflows available: Visual and Advanced Workflows.
- **Path:** Displays the path of the new workflow.

Click create.

Visual Workflow Editor



Overview of Visual Editor Terminologies

Target Asset: If an asset triggers a workflow, the asset that triggered the workflow is called the target asset. The target asset is the asset that workflow nodes will act on. For example, if a Move Asset node is executed, the asset that will be moved is the target asset.

Incoming Asset: The primary asset in which the workflow runs/ was triggered on.

Transitions: A transition is a line that connects two nodes. It graphically represents the order in which nodes will be executed. A transition is made of two parts, the node it starts from, and the node it points to.

Output Pins: Nodes have one or more Output Pins to their right. These are where transitions start from. Clicking an Output Pin and dragging-and-dropping the line that appears onto another node will create a transition between the two nodes. The order of execution of a transition is from the Output Pin of one node to the other node which the transition points to. Moving the nodes will not break the transitions they are connected to.

By default, each node has an OK and an Error Output Pin. If the node is executed and ends in the OK state, the next node to be executed is the one that is pointed to by the transition that starts at the OK Output Pin. If the node is executed and ends in a failure state, the node connected by a transition to the Error Output Pin will be the next node to be executed.

Router Nodes have configurable Output Pins, and they can control which transition will be picked based on matching conditions.

Pointer End Overlapping: Hover the cursor over the pointer end of a transition to space out multiple overlapping end pointers. Removing a Transition To remove a transition, drag and drop its pointer end to a blank area on the workflow canvas. **Smart Names:** Certain parameters of certain nodes are SmartName enabled. This is a variable that will be resolved only when the node is executed. When the value is resolved (for example, an attribute value is found), this will be used as the value during the execution of the node.

To configure a Smart Name,

1. Click the green brackets button to the right of the text field.
2. Select a Schema Field
3. The target asset's value for the selected field will be inserted into the green bracketed placeholder in the field value when the node is executed.

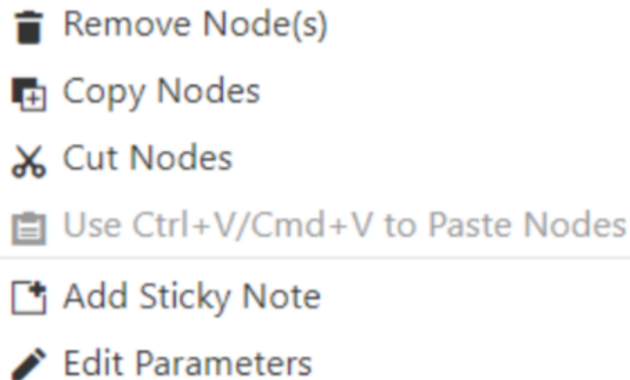
Node Alignment: Vertical and horizontal alignment lines will be displayed when the user holds Shift Key and drags a node around the workflow canvas. Vertical alignment lines are visible when the node is dragged without any connection. If the node you are dragging is connected to another node by a transition, the horizontal alignment lines will be visible as well.

Tools

At the top of the Visual Workflow Editor, the Tool Bar for controlling the workflow canvas is displayed.

- **Zoom In:** Zooms in the workflow canvas
- **Zoom Out:** Zooms out the workflow canvas
- **Zoom to Fit:** Zooms and pans the workflow canvas so that all nodes are visible
- **Pointer:** Allows to interact with the nodes and transitions in the workflow canvas. Drag-and-drop a selection box around multiple nodes to select them
- **Pan:** Allows to pan the workflow canvas.
- **Undo:** Undoes the last action.
- **Redo:** Redoes the last action.
- **Remove Selected Node(s):** Removes the selected node(s) from the workflow canvas.

Contextual Menu



Right click a node to display the context menu. This menu allows the user to remove, copy and cut nodes. Use Ctrl+V or Cmd+V to paste the nodes.

Note that the copy and cut keyboard shortcuts are also supported. Additionally, the option to open a node's parameters menu and add a sticky note is also available.

Add Sticky Note: Sticky notes are used to write messages directly on the workflow canvas. Click the top right trash icon to delete the sticky note. Click the top left pencil icon to begin editing. When editing, click the top left checkmark icon to save. Sticky notes can be moved by dragging and dropping the top bar. Sticky notes can be resized by dragging and dropping the bottom right corner.

Edit Parameter: Click to edit the parameters of each node.

Nodes

A node represents a task that MediaBeacon will perform automatically. A node can edit metadata, move assets and other useful tasks.

- **Rename:** Double click a node's name to rename node.
- **Node Parameters Menu:** Double click a node to open the node's parameters menu.

Ensure that the Pointer Tool is enabled before doing these actions.

Node List

A list of node types is listed on the right side of the Visual Workflow Editor. To add them to the workflow, drag and drop them onto the workflow canvas.

Filter Nodes by Category: Choose an option from the drop down above the Node List to filter the nodes that appear in the Node List by category.

- **Auto Tasks:** All the nodes that contain auto tasks (actions on an asset).
- **Statuses:** All the nodes that change the status of the workflow.
- **Workflow Constructs:** All the nodes that change the flow of the workflow. For example, nodes that make a decision, like routers.

Filter Nodes by Name: Filter the nodes that appear in the Node List by typing into the search field. The search field accepts * as a wildcard.

Node Types

Currently, MediaBeacon provides 20 nodes to the users. Users can drag and drop the nodes into the Visual Workflow Editor.

- To rename the nodes double click on the name of the node.
- To edit the parameters users can use either the contextual menu by right clicking the node or double-clicking the node.

1. Add To Discussion

The Add to discussion node is used to add a message in the Discussion tab.

2. Advanced Workflow

The Advanced Workflow node can be used by the users to call in an existing advanced workflow in the current workflow.

- **Target Workflow:** A target workflow can be selected from the list of advanced workflows.
- **Parameter name and Value** can be used to retrieve the values dynamically to the workflow. They can be set as a key-value pair.

3. Completed

The Completed node ends the workflow and changes the workflow status to completed.

4. Convert Asset

The Convert Asset node is used to convert the incoming asset.

The configuration panel for this node shows conversions defined in the conversions type that is currently configured with the admin user's ACL. The list presented, however, omits any conversion that uses the nochange image format. For example, we can convert a JPEG image to a PNG image using this node.

Note that the converted asset is referred to as renditions.

5. Copy Asset

The Copy Asset node copies the incoming asset to the target folder.

- **Target Folder:** Users can select a target from the list of folders.
- Also, the user is given the option to set the target folder's behavior from the following options:
 - Apply the triggering user's ACL path to the target folder.
 - The target folder will remain relative to the system root folder.

6. Logger

The Logger node is used to log messages that can be found under workflow.logs. The log level can be set under its parameters.

7. Mapped Metadata Write

The Mapped Metadata Write node is used to retrieve synonyms from a dictionary and add those to a selected field.

- Dictionary: Select an existing dictionary from the list.
- Word: Enter the word.
- Write Synonyms to: Select a field to which the synonyms should be added

8. Move Asset

The Move Asset node is used to move the target asset to a target folder that is specified in the node's parameters menu. If the folder does not yet exist, it will be created.

- **Target Folder:** The folder where the target asset will be moved to.

9. Normalize Asset

The Normalize Asset node is used to normalize the incoming asset to the standardized XMP structure.

10. Publish Rendition

The Publish Rendition workflow node publishes the incoming asset to the configured external portal S3 bucket. This node requires **Convert Asset** as a prerequisite node, which provides a converted rendition for the primary asset.

This workflow node uploads the rendition to the above specified bucket and updates the 'S3 Rendition' (multi-value, read-only) field in 'AWS' form of the primary asset with the following details:

[Conversion_Preset_Name]:[S3_Object_URL].

11. Rename Asset

The Rename Asset node is used to change the asset(s) name.

- **New Name:** The name to replace the existing name.
- **Use Current Extension:** Enable this option to keep the current extension of the asset.

12. REST

The REST node is used to make REST calls.

- **Url:** The url to send the REST request to.
- **Method:** Select whether your REST request will use the GET or POST method.
- **Parameter Name:** The name of a parameter to include with the REST request.
- **Parameter Value:** The value of the corresponding parameter name to include with the REST request.
- **Add Parameter:** Clicking the + button will add another parameter to the REST request.
- **Remove Parameter:** Hover your mouse over a parameter's row to display the Remove Parameter button. Click the Remove Parameter button to remove the corresponding parameter from the list.

13. Router

The Router node automatically decides the route that the workflow will follow. In other words, this node is used to conditionally choose which Output Pin will be followed along the corresponding transition to the next node.

- **Route based on:** Choose a schema to be inspected.
- <Chosen Schema>: Choose a field to be inspected.
- **Case sensitive:** If this box is checked, matching will be done with case sensitivity.
- **Rules:** The rules are executed from top to bottom. The last rule, no match, will be applied when the other rules are not applicable. This will result in Error or a custom label.

- **Adding a Rule:** Click the + button at the bottom of the Router Node parameters menu. For each additional rule another Output Pin is added to the Router node.
- **Removing a Rule:** Hover the cursor over a rule's row to display the Remove Rule button. Click to remove the corresponding rule from the list.
- **Comparison:** Pick a comparison that the rule will check.
- **Value to Compare:** Pick a value that will be compared to the field value of the target asset. The leading and trailing spaces are always ignored. The wildcard * and regex are supported values for the **matches** and **do not match** comparisons.
- **Route to:** The label that will display when the mouse is hovered over the corresponding output pin.

14. Send Email

The Send Email node is used to send emails.

- **To:** This parameter has a feature which will substitute an email address for a username when using a smart name with a field like `http://mediabeacon.com/ns/default/1.0/uploadUser`. The email address that will receive this notification. Use a semicolon as a separator between multiple receivers.
- **Subject:** The content that will appear on the subject line of the email.
- **Message:** The content of the email.
- **Attach the asset link:** Includes a link to the target asset in the email.
- **Attach the asset(s):** Includes the asset(s) in the email.



Note: In previous versions of MediaBeacon this node was named **Send Notification**. In 20.0, its name has changed to reflect that it creates emails, distinct from the bell style notifications of 20.0.

15. Send Notification

The Send Notification node allows a visual workflow to send a notification to one or more users as part of the workflow.

- **Users to Notify:** Allow one or more recipients to be specified. Note if the Smartname "[User.Username]" is used, the user who initiated the workflow will receive the notification. The User icon button opens the Select Users dialog to choose current active users of MediaBeacon.
- **Notification Text:** Defines the text to send in the notification.

16. Start

The first node to be executed when the workflow is triggered.

17. Subscribe

The Subscribe node allows the incoming asset that is running through the workflow to be subscribed or unsubscribed to/from the listed user or users.

- **Users to Subscribe:** Select the users from the list.

18. Unpublish Rendition

The Unpublish Rendition node is used to unpublish the selected rendition(s) from the incoming document.

This workflow node fetches the S3 Object ID for the selected preset(s) and deletes the rendition from the above specified bucket and removes the entry from the 'S3 Rendition' (multi-value, read-only) field in the 'AWS' form of the incoming asset.

19. Unsubscribe

The Unsubscribe node allows an asset that is running through the workflow to be subscribed or unsubscribed#to/from the listed user or users.

- **Users to Unsubscribe:** Select the users from the list.

20. Write Data

The Stamp Data node is used to stamp the triggered asset with metadata. Select schemas and enter the field values that will be stamped on the target asset.



Important: The Publish and Unpublish Rendition nodes require an additional license purchase. The users can see these nodes when they purchase the appropriate license. Contact your MediaBeacon representative to learn more.

Advanced Workflow Editor

The Advanced Workflow Editor provides much more functionality than the Visual Workflow Editor. However, it does require writing code in JavaScript.

Code

This area holds the code that is to run when the workflow is triggered.

Enable Workflow

When checked, the workflow is enabled and can be run when triggered. Disabled workflows will never run. A workflow needs to be enabled to change its type, set/add parameters, or toggle the client-side triggering flag.

Workflow Types

- **Regular:** A standard workflow that runs when triggered by a client-side trigger, an asset-based trigger, or a scheduled trigger.
- **Permission:** Makes the workflow available to use as an option for a subset of ACL privileges in the ACL setup (like a replacement for ActionSecurity plugins, done in workflow instead of Java plugins).
- **Login:** Triggers the workflow whenever the user logs in.
- **Library:** The Library option is for organization and allows other workflows to call this one. The workflow thread limits can be set from single execution to 15 times. For example, if the thread limit is set to 4, then it will trigger 4 threads at a time. (Here it's not like it will trigger 4 threads at a time, it's more like it allows for 4 threads to get triggered at a time)

Requires File System Access

Selecting this option provides a hint to MediaBeacon that the workflow may write data to the filesystem (change the asset). In most cases, this setting is no longer required. (Writing to the filesystem is almost always allowed.)

Run as a Batched Bulk Edit on Current Selection

Selecting this option increases efficiency of bulk edit workflows. It allows the workflow to only be triggered once when called for a bulk edit action instead of one call per asset edit.

Advanced Workflow Execution Limit

In Advanced workflow, the parameters of the workflows were limited to the Single Execution Checkbox. When enabled the checkbox, the instance of thread limit was either to have 1 or no limits. Single Instances of the workflows can create a backlog of items to be triggered and this results in a delay of workflows to happen.

The workflow thread limits can be set from single execution to 15 times. For example, if the thread limit is set to 4, then it will trigger 4 threads at a time.



Note:

The default execution limit is 15.

To enable the changes you have made, always restart MediaBeacon.

If the limit is 1, then restarting is not necessary

Workflow Triggers and Parameters

Enable Client-side Triggering

Useful for allowing the workflow to be triggered by a button within the MediaBeacon interface. When toggled on, a Workflow ID is presented for use in triggering the workflow.

- **Trigger:** Simply triggers the workflow.
- **Trigger in new window:** Triggers and shows the return value of workflow in the new window.
- **Workflow ID:** Triggers workflow using API Timeout.

Workflow Parameters

Allows the creation of parameters that can be passed into the workflow during its execution.

Timeout

Stops the workflow after it has run for the set amount of time. This configuration is important since the workflow runs in thread for every new workflow to get triggered it should be taken from queue, if some workflow failed other workflow should not be waiting in queue, instead user can define this timeout period.

Properties

Properties are used in a workflow to retrieve the values dynamically. They can be set under properties tab as a key value pair.

These key value pairs can be accessed in the js of the workflow in the object returned by calling "context.properties".

These values are saved in the database and will not be overwritten if the workflow is updated by an outside source like the package manager.

Debug

This option is useful to enable when developing a workflow. Once enabled, the workflow can be run from another window at the URL provided from the Debugger Connection URL section. Debugging information will be displayed. It is recommended that this option be disabled when a workflow is in a production environment.

Asset-based Triggers

When enabled, the workflow can be triggered based on any combination of assets being added, removed, or metadata being edited.

Note that some nodes are restricted for a selected asset action, like move asset node. This does not make sense with asset removed action during which the user is notified with a pop up.

Scheduled Triggers

Workflows can be configured to run on a schedule such as hourly, daily, weekly, or every X minutes.

Save

Click Save to save the workflow.



Note: Users can filter the triggers using the \$today function. This is applicable to all the date fields in the workflow editor. Refer the [\\$today page](#) for more information.

5.2.4. R3Search Dialog

Management of the Solr Admin Interface.

The Menu Bar > Manage > R3Search command opens the Solr Admin UI. MediaBeacon automatically configures this interface, so there are no changes that need to be performed in this interface to change MediaBeacon function.

For reference, the documentation for this interface can be found at: https://lucene.apache.org/solr/guide/6_6/using-the-solr-administration-user-interface.html

5.2.5. System Status Dialog

A dashboard for various system performance interfaces.



Attention: In MediaBeacon 22.07, the improved System Status Dialog UX displays various system performance status as consolidated tab options on the left. Users can navigate through the properties using the scroll bar.

The properties are arranged into smaller subsets of major system statuses as follows:

System Info	User Info	Workflow Info	Queues	Logs
Health	Login Information	Status	File Action Queue	Global
Statistics	API Keys	Triggers	Preview Queue	Workflow

External Links	Preview System
Long Running Queries	R3search
	Solr
	Request
	Webserver
	Remote



Note: The Download configuration has been moved to the Admin Core Menu Commands. Refer [Download configuration](#) on page 82



Note: Users System Status is now called Login Information.

Health

This section details the Health of MediaBeacon server.

The administrator can run tests and get the output. The status of Database, Disk I/O, Remote Systems, XMP and Anti virus software detection is displayed and the tests can be initiated separately using Run Tests button and together using Run All Tests.

Statistics

This section displays the statistics of MediaBeacon's Assets, Users and System.

External Links

The section details the list of External Links with its share details.

Long Running Queries

This section details the duration of the SQL Queries. The administrator can see the list of queries, the call time, and the duration of each query.

- The queries can be sorted by the duration using the arrow next to Query Duration.
- Pagination is similar to the List view in MediaBeacon.

Login Information

This section details the login information of every user. The table displays:

- The name of the user.
- Date and time of their last activity (YYYY/MM/DD).
- Date and time of their creation. (YYYY/MM/DD).

Filtering Login Information

- Filter Username can be used to instantly search for a user from the list.
- When the Show Logged in Users check box is enabled, administrators can see the list of users who are currently logged in along with the name of the administrator.

- The Arrow icon next to the User Name can be used to sort the list of users ascending and descending.
- Pagination is similar to the List view in MediaBeacon.

API Keys

This section details the list of MediaBeacon REST API keys. It gives the details of the API keys command which are executed, along with the name of the user who executed the command and also displays the expiration date of each executed API keys.

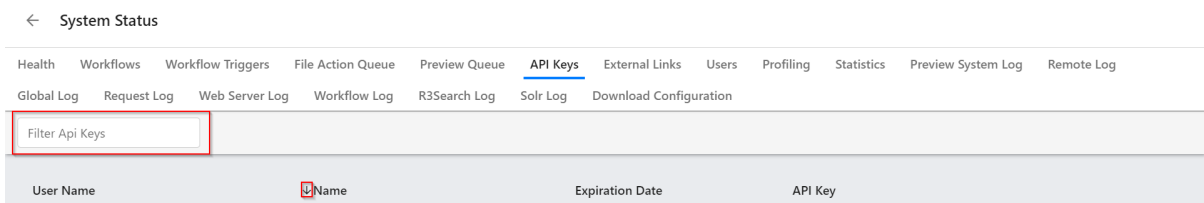
The Administrator can create a new API key using the Create API key icon below the API status page.

Refer <https://www.mediabeacon.com/en/api-documentation#latestDocs> to read more about MediaBeacon REST API keys.

Filtering API Keys

The Api keys added can be filtered using the Filter Api Keys field in the System Status. The user can find an Api key without surfing through all the pages. The user can type in a word, number or symbol and by hitting enter, it returns all the Api keys having the same word, number or symbol in its User Name, Name, Expiration Date and Api Key.

The filter API key field to search an API key by user, key name, expiration.



← System Status

Health Workflows Workflow Triggers File Action Queue Preview Queue **API Keys** External Links Users Profiling Statistics Preview System Log Remote Log

Global Log Request Log Web Server Log Workflow Log R3Search Log Solr Log Download Configuration

Filter Api Keys

User Name	Name	Expiration Date	API Key
-----------	------	-----------------	---------

You can also find and sort Api keys ascending or descending by using the arrow next to User Name, Name, Expiration Date and Api Key. Sometimes the user needs to click on each option to view the arrow.

This will help a user to find an API key in a system which has hundreds or thousands of API keys.

Workflow Status

This section details the status of each workflow.

- Workflow Name
- Start Time
- Running Time
- Date Completed
- User
- Trigger Type Worker

Workflow Triggers

The Workflow Triggers details the list of various workflows which have been triggered.

- Scheduled Triggers
 - Interval

- Minutes
- Daily
- Hourly
- Asset Based Triggers
- Client- side Triggering

File Action Queue

The section details the list of the File Action in Queue.

Preview Queue

The section details the list of the Files with its process status.

Logs

Logs section in MediaBeacon System status contains the details of various system performance logs.

- **Preview System:** All the logs regarding the Preview System
- **Remote:** All the logs regarding the remote access to the MediaBeacon instance.
- **Global:** All the logs.
- **Request:** All the logs regarding the web server requests
- **Web Server:** All the logs regarding the functions of the web server.
- **Workflow:** All the logs regarding the workflows.
- **R3search:** All the logs regarding the R3search server. These can be separate servers or built-in to the MediaBeacon core. Note that R3search is built on top of solr.
- **Solr:** All the logs generated by the solr subsystem

The common properties of logs contain

- **Download logs:** This button enables the administrator to download each log.
- **Load all:** Hovering over this button displays the total size of each log and the administrator can load all logs of the particular section by clicking this button.
- **Filter:** Filter tab can be used to search logs using any value.
- **Sort:** Info is the default sort value. The administrator can select from the dropdown list to sort the logs. The sort option available are
 - All
 - Finest
 - Fine
 - Finer
 - Config
 - Info
 - Warning
 - Severe

5.2.6. External Plugins

The External Plugins command is displayed under User Profile Functionality when MediaBeacon's license includes the option for the Microsoft and/or Adobe connectors, allowing access to the External Plugins dialog.



Attention: Use of this command is granted to all users if the installation's License permits use of the Connectors.

External Plugins
×

Adobe Connector

The MediaBeacon Adobe connector requires Adobe CC 2019+ (InDesign, Illustrator, or Photoshop).

Copy Authentication String
Download

Microsoft Office Add-in

Install Steps:

1. Sign in to Office 365 with your work or school account.
2. Select the app launcher icon in the upper-left and choose Admin.
3. In the navigation menu, choose Settings > Services & add-ins.
4. If you see a message on the top of the page announcing the new Office 365 admin center, choose the message to go to the Admin Center Preview (see About the Office 365 admin center).
5. Choose Upload Add-in at the top of the page.
6. Choose the option "I have the manifest file (.xml) on this device". Upload the xml file and Choose Next.
7. Provide your desired access settings and save the add-in settings.

Copy Authentication String
Download

Disabling Display of Plugin Sections

If there is a need to hide one of these sections, the following system properties may be used.

- Disable display of Microsoft Office Add-In section in the External Plugins dialog:
mb.disable.office.plugin=true
- Disable display of the Adobe Connector section in the External Plugins dialog:
mb.disable.adobe.plugin=true

Disabling Download of External Plugins

If there is a need to suppress only the download button for either or both of these connectors, the following system properties may be used.

External Plugins
×

Adobe Connector

The MediaBeacon Adobe connector requires Adobe CC 2019+ (InDesign, Illustrator, or Photoshop).

[Copy Authentication String](#)

Microsoft Office Add-in

Install Steps:

1. Sign in to Office 365 with your work or school account.
2. Select the app launcher icon in the upper-left and choose Admin.
3. In the navigation menu, choose Settings > Services & add-ins.
4. If you see a message on the top of the page announcing the new Office 365 admin center, choose the message to go to the Admin Center Preview (see About the Office 365 admin center).
5. Choose Upload Add-in at the top of the page.
6. Choose the option "I have the manifest file (.xml) on this device". Upload the xml file and Choose Next.
7. Provide your desired access settings and save the add-in settings.

[Copy Authentication String](#)

- Suppress download of Microsoft Add-In: `mb.disable.office.plugin.download=true`
- Suppress download of Adobe Connector Add-In: `mb.disable.adobe.plugin.download=true`

5.3. Component Configuration

Options for Configuring Components.

MediaBeacon allows administrators to add a wide array of components to workspaces. Each component has its own end user and administrator articles, detailing configuration and usage. Below is a list of existing components.

Component configuration changes are now tracked in Metrics.

Components of Greatest Use

The following is a list of the most-used components in MediaBeacon.

1. Quick Search
2. Search Status
3. Filter Search
4. Directory Browser
5. Infinite Scroll View
6. Tile View
7. List View
8. Cart
9. Conversions
10. Upload HTML
11. Places Browser
12. Form Stamper
13. Featured Content
14. Form

5.3.1. Using Components on Workspaces

Adding, removing, arranging and sharing components on workspace layout zones.

Adding Components to a Workspace

The components resident to any given workspace can be added by either:

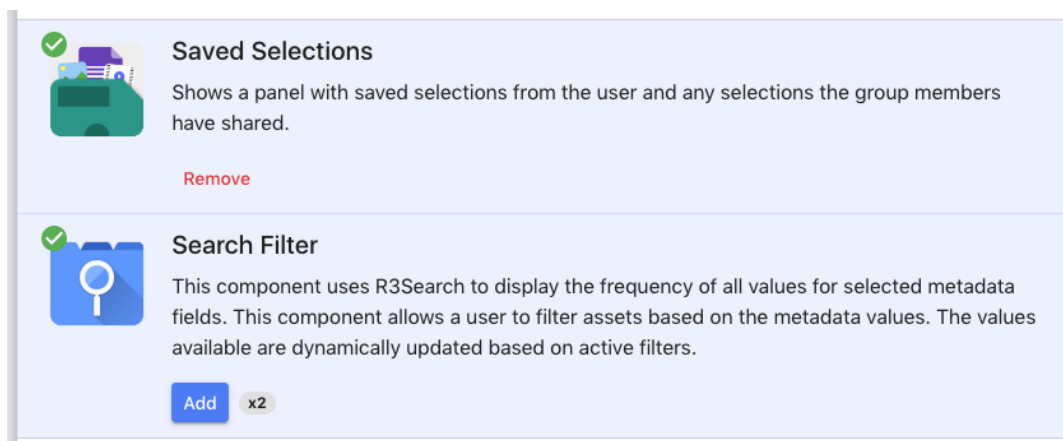
- The Manage Workspace dialog, see below.
- Loading a component asset (.mbwidget).
- Sharing a workspaces between ACLs. See the [Using Workspaces](#) on page 92 article for more information.

When new components are added, they typically appear in the left-hand layout zone, and shared ones appear in the bottom layout zone. components can be moved from these initial locations.

See [Manage Workspace Dialog](#) on page 85 for information on the Manage Workspace dialog.

Adding Components via the Manage Workspace Dialog

In the component sections of the Manage Workspace dialog, components may be added to the current workspace by clicking the "Add" button under each component section.



- **Single-instance components:** Workspaces may contain only a single instance of this type of component.
 - These components will display a "Remove" button under a component's entry when on the current workspace. Clicking this button will remove the component from the current workspace.
- **Multi-instance components:** Workspaces may contain any number of this type of component.
 - These components will display a count indicator to the right of the "Add" button.
 - **Note:** Removing multi-instance components cannot be done in the Manage Workspace dialog.

Loading a Component Asset

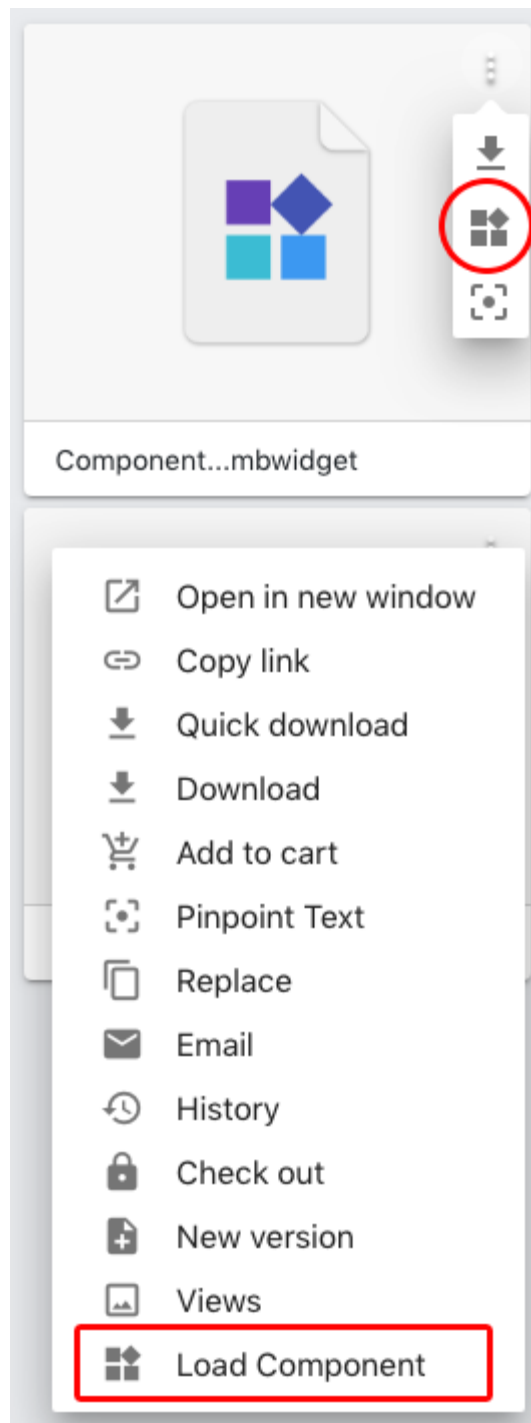
A component's current state may be saved to a component asset that allows the component to be copied onto other workspaces. Components added via this method are not "linked" or "shared", but separate instances of a component.

Create

1. Enter admin mode.
2. Open the configuration dialog for a given component.
3. Expand the "Share component with other workspaces" section.
4. Click the "Export component to asset" button.
5. The asset (.mbwidget) will be downloaded to the administrator's desktop.
6. Upload the .mbwidget asset into MediaBeacon.

Load

1. Right-click the asset and choose "Load Component".



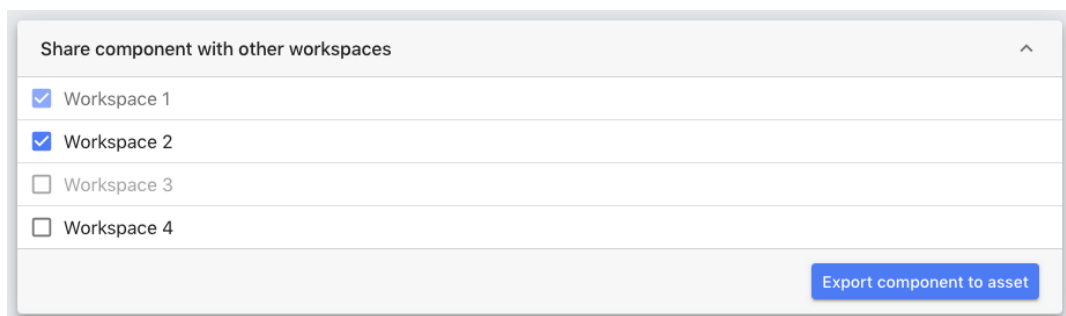
2. Component is added to the current workspace.

Note: If the component being loaded is a single-instance component, and the current workspace contains one of that class of component, it will not be added.

Sharing Components Between Workspaces

Components can be shared across different workspaces, similar to the way that workspaces are shared across ACLs. In this state, known as "component linking" the settings of the shared component is the same on every workspace on which it appears.

A component is shared in the "Share component with other workspaces" section of its configuration dialog (accessible via the gear icon displayed on each component in admin mode.)

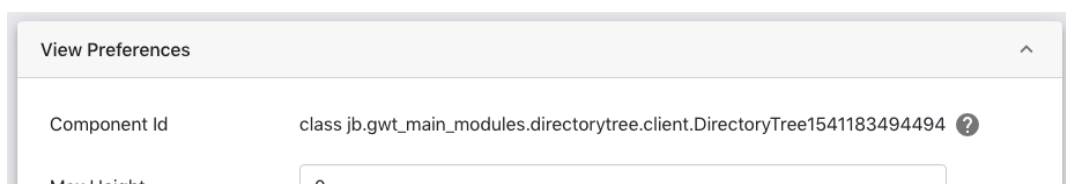


- Checked box, Gray text: The component is resident to this workspace.
- Checked box, Black text: The component is currently shared with this workspace.
- No check, Gray text: This component may not be shared with this workspace. This is due to another instance of a single-instance component being resident on that workspace.
- No check, Black text: The component is not currently shared with this workspace.

Component Linking and Component ID

When the "Preserve Component Links" option is used to duplicate workspaces, all components on the new workspace are linked to the ones on the old workspace.

The mechanism that controls this is the "Component ID", which can be seen in the "View Preferences" section of a component's configuration dialog.



The Component Linking function is discussed in detail in the [Managing Components] section, but to summarize this feature: Component linking allows components with identical "Component IDs" to share the same configuration.

Custom Component ID

The Component ID can be altered to a set string, maintaining this ID if the workspace is exported and shared. A locked padlock icon indicates the ID is stable.

This feature cannot be used to "sync" a component with a pre-existing custom ID. If the administrator enters an already used ID, a dialog is displayed that says "Cannot set the component id to that value. That value is already used with another component."

Removing Components from a Workspace

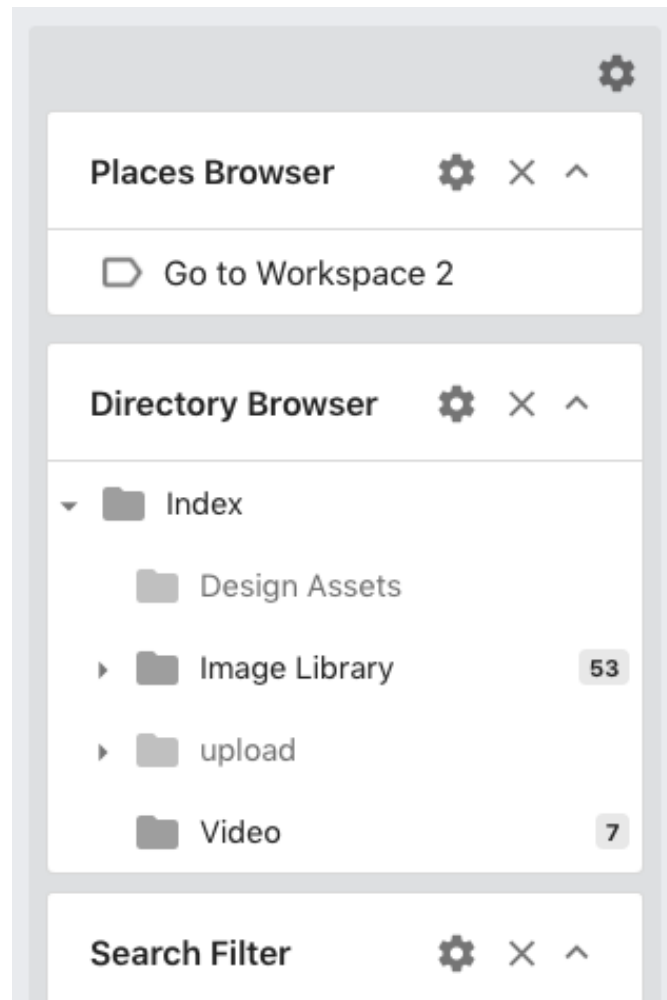
When components are removed, they will be permanently deleted unless they are shared with another workspace, or have been saved as a .mbwidget asset.

Components may be removed from workspaces in a variety of ways

- When viewing a workspace in admin mode, clicking the "X" button in a component's title bar.
 - A toast notification will appear to inform the admin that the component has been removed, which also presents an "Undo" button.
 - This gives the admin 10 seconds to revert that change, after which the component is permanently removed.
- Unchecking a component in the "Share component with other workspaces" section.
 - This removes components on other workspaces.

Layout Zones

The layout area of each workspace allows components to be placed into discrete regions, called layout zones. In admin mode, these are indicated by a darker background and a gear icon in the upper left corner.



Most components can be placed in any layout zone, and will expand or contract to fit the width of their containing zones. Some exceptions to free layout zone placement are:

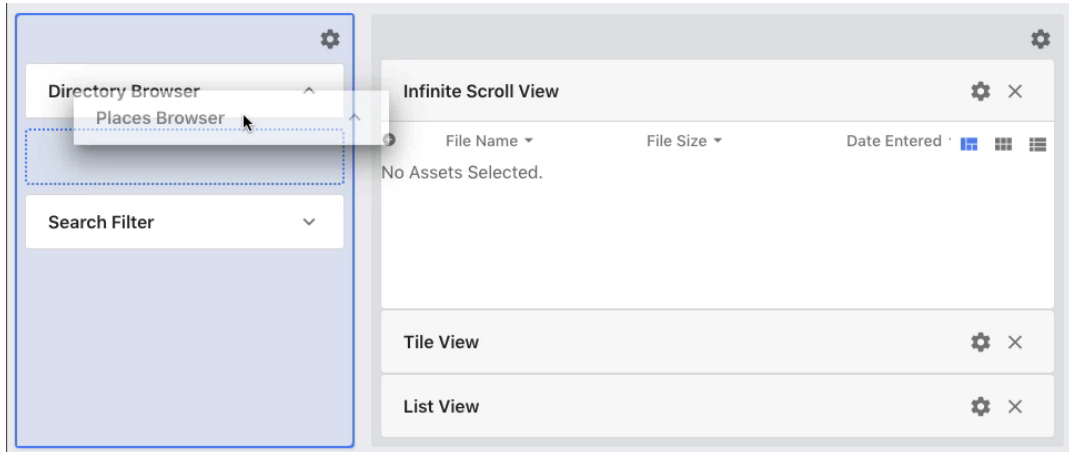
- Some components have a "Menu Bar Mode", that fix their positions to preset areas on the page:
 - Quick Search
 - Search Status
 - Cart
- View components may only reside in a special "view component zone". However, other types of components may be placed above, below, or between them in this zone.
 - This is usually the center middle zone in any given layout, but other layouts may have a different location for the view component zone.

Arranging Components

Components can be moved, while the user is in Admin mode, by click-dragging the title bar of the component.

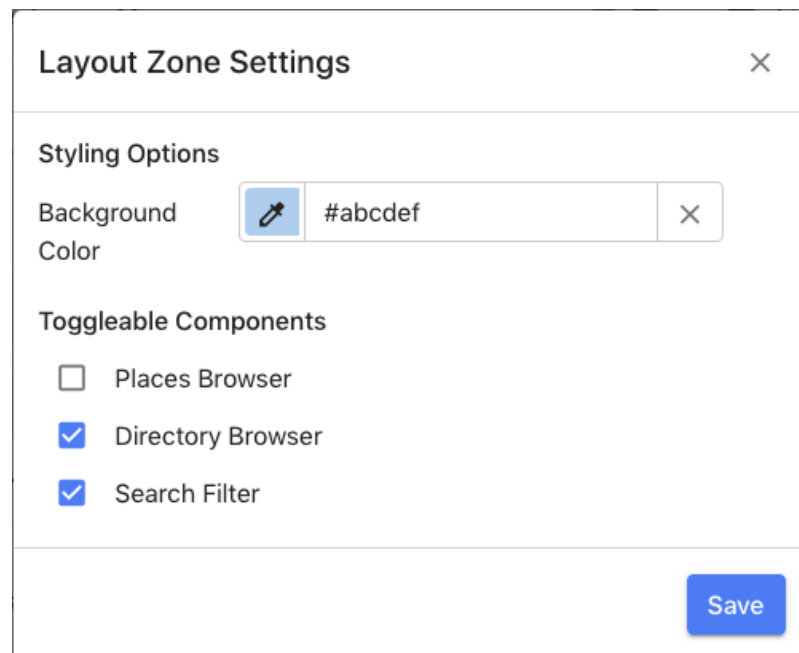
- The body of the components in the current layout zone will snap closed.

- The title bar of the dragged component will become transparent during the drag.
- While in this state, the component may be moved to another layout zone or rearranged with respect to other components in the current layout zone.
- The new position indicated by a blue outline. When the user releases the mouse button, the component will be placed in the blue outline and the body of components will again be shown.



Layout Zone Settings

Layout zones themselves have settings that affect the look and visibility of components. The Layout Zone Settings dialog is displayed when the gear icon in the upper right of a layout zone is clicked.



- Background Color
 - The controls the background color of the layout zone, which is normally transparent
- Toggleable Components
 - This option lists the current components contained in the layout zone with a checkbox for each. When checked, only one "toggleable" component can be viewed at a given time in a workspace.
 - Clicking a closed title bar will collapse the title bars of other toggleable components and open the clicked component.
 - Clicking the title bar of an open, toggleable component will collapse the clicked component, other toggleable components remaining unchanged.
 - Note the toggleable option is not available for View components, as they have an auto-toggling feature shared between other view components.

The "toggleable" setting will override a non -View component's "Hide Component Title" setting, hiding it in the Configuration dialog.

The "toggleable" setting is per layout zone, and setting a component to toggleable in one zone does not make is toggleable by default when moved.

5.3.2. Information Components

Below details various Information Components of MediaBeacon. (Some components are under construction.)

- **Login:** This component displays a Login form. Refer [Login Component Configuration](#) on page 138
- **Logo:** This component displays a high resolution image for branding a page. Refer [Logo Component](#) on page 139
- **Loading Dock Status:** Component for displaying the contents of the loading dock. Also has global loading dock actions. Refer [Conversion Type](#) on page 66
- **HTML:** Component displays HTML markup as well as MediaBeacon wiki markup.
- **Upload HTML:** Displays HTML markup as well as MediaBeacon wiki markup. Users can drag and drop files onto the component to upload
- **Form:** This component displays a Form and tracks either the current selection or the single selection, displaying information accordingly.
- **Report:** A component to give reports on certain points of data such as number of users or total asset size.
- **Search Status:** This component allows a user to view and remove any filters applied to the current view.
- **Video Playback:** This component leverages an HTML5 video tag to play videos back to back.

Login Component Configuration

The Login component displays a login component on the workspace. This component can be used by a user to switch between user accounts.

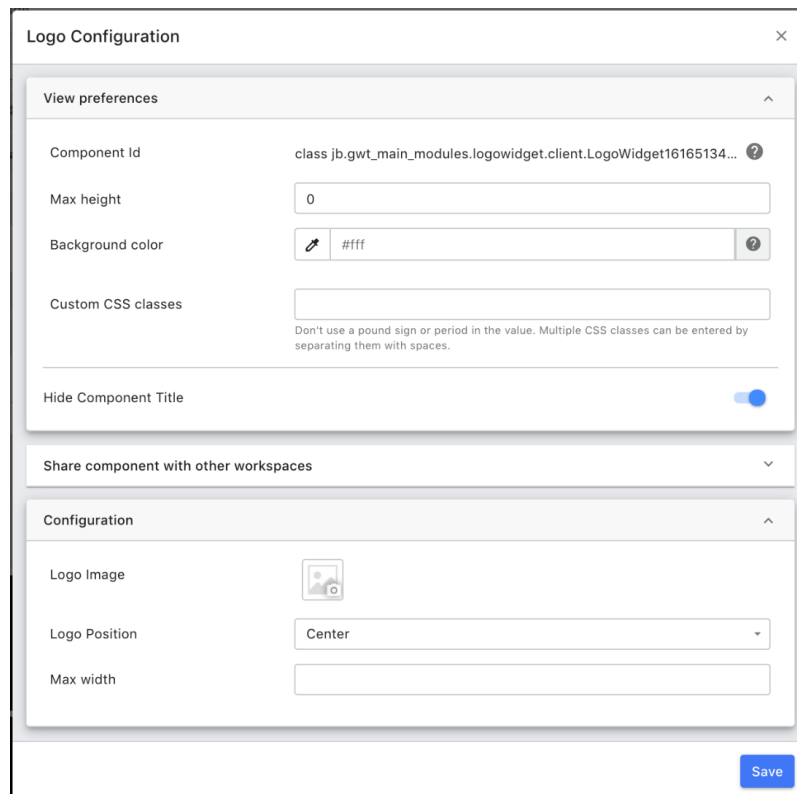
Best Practice of this component is when configuring a brand page with multiple users and workspaces.

Administrators can configure the following:

- **Show Forgot Password:** Enables Forgot Password button which opens the Reset password dialog. Users can enter the Username or Email to which a Reset email link will be sent.
- **Show Create Account:** Opens Enter Activation Code dialog in which the user can enter the Activation Code of a new account and create a new account.
- **Show Language Selection Button:** Enables a language selection button from which the user can choose any of the following languages.
 - English
 - Deutsch
 - Espanol
 - Francois
 - Japanese
 - Portugues do Brasil
 - Mandarin
- **JavaScript to run on log in:** Code entered here will run when a user logs in.

Logo Component

This component makes use of the Icon Picker to display an image wherever components are placed. Refer [Icon Picker Dialog](#) on page 140



The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

Configuration

- Logo Image: Opens the Icon Picker, allowing the user to choose an image to display.
- Logo Position: Determines whether the image will be displayed in left, center, or right justification within the logo component.
- Max width: The pixel value entered here directly limits the width of the image.
- Max height: Located under the View Preferences tab, this property will limit the height of the displayed image.



Note: The image will always be displayed in its original aspect ratio.



Note: The image will not be scaled above its original size.

Icon Picker Dialog

This dialog is used in many places throughout MediaBeacon's interface. It allows users to add an image as an "Icon", that can then be used as a display element in various parts of the UI.

This includes:

- User Account Icons, via the Contact Information dialog
 - Only shows thumbnails that the user themselves uploaded.
- Manage Workspace dialog:
 - Home Button Icon
 - Dark Theme Home Button Icon
 - Workspace Icon
 - Workspace Background Image
- Component configuration:
 - Metadata Stamper component icons
 - Logo component
 - Places Browser icons
- Admin Core
 - ACL icons
 - Conversion preset icons

The icon picker is accessed wherever below icon is displayed.



Clicking it will open the "Pick a photo" dialog.



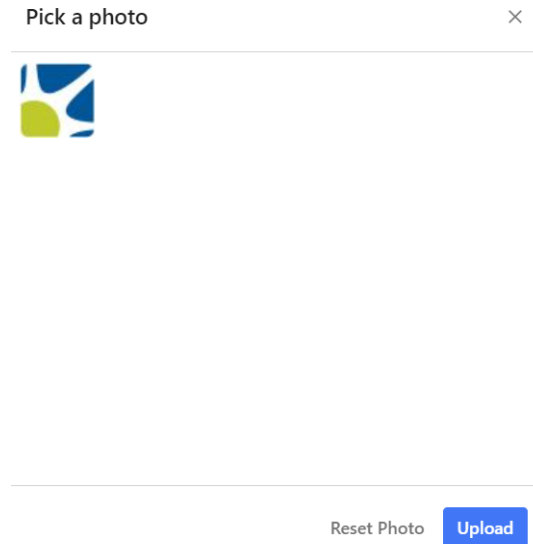
Contact Information Icons

Also called "profile icons", MediaBeacon 21.07 displays the icons that have uploaded by the users prior in the system as icons.

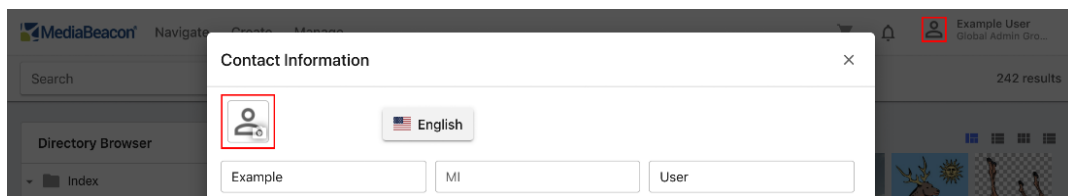
Pick a photo ×

Reset Photo Upload

If there are no icons present in the Icon Picker, this means that there are no images uploaded by the user and needs to upload a new image.



Choosing an image here will use it in the associated UI context, as well as display the thumbnail in the Icon Picker icon's place.



The user may revert the icon to its unassigned state by clicking "Reset Photo".

Uploading New Icons

Users may upload a new icon by clicking the "Upload" button. The limitations for this icon:

- No larger than 2 Megabytes.
 - The icon picker has a limitation of 2 MB for an uploaded image. This can be altered with the system property "mb.max_thumbnail_size", and defining a number of bytes as the limit for icon upload. This is not recommended, as it can affect page responsiveness and load times.
- No specific pixel x pixel limitation, but the recommendation is to upload icons that are the exact size needed for display, or if larger, only exactly double displayed size. This will reduce blurriness due to scaling.
- Formats: JPG, PNG (supports transparency), GIF (does not support animation).

Uploaded Icons

Each icon can be removed by hovering the cursor over it, and clicking the "X" pop-up button. There is no confirmation, and this deletion is final.

General Users are prevented from deleting icons when their ACL includes the “Thumbnail Deletion” permission restriction.

If a given icon that is in use is deleted, a broken image icon it will be displayed in the UI until a new icon is reassigned.

5.3.3. Search Components

Below details various Search Components of MediaBeacon. (Some components are under construction.)

- **Color Search:** Uses the R3Search back end to search assets based on the colors inside them.
- **Directory Search:** The directory browser displays the file system as a tree, allowing users to view assets by their position in the file system. Granted appropriate permissions, users can add, move, rename, copy, or delete folders.
- **Graph Search:** Visually drill down on asset metadata.
- **Featured Content:** This component displays content from an arbitrary source with paging.
- **Metrics View:** Component which displays MediaBeacon usage metrics. Adding this component to a workspace will cause only metrics data to be displayed on the workspace. No searching of data beyond the metrics core is possible until this is removed.
- **Places Browser:** This component holds Places that can be arranged and organized in a folder structure tree. A Place is a shortcut to a specific ACL, workspace, directory, saved selection, saved search, or hierarchy tree link.
- **Quick Search:** This component searches assets by filename (case-sensitive) and the MediaBeacon ID number by default. The MediaBeacon administrator can enable additional fields or types of metadata to be available for searching.
- **Saved Searches:** Shows a panel with saved searches from the user and any searches the group members have shared. Refer [Saved Searches Component](#) on page 172.
- **Saved Selections:** Shows a panel with saved selections from the user and any selections the group members have shared.
- **Filter Search:** This component uses R3Search to display the frequency of all values for selected metadata fields. This component allows a user to filter assets based on the metadata values. The values available are dynamically updated based on active filters.
- **Refinement Search:** Provides information on which metadata fields contain your most recent search terms, and allows you to further focus your search by field and term.
- **Tag Cloud:** Create a tag cloud from values in any solr indexed field.
- **Taxonomy Browser:** This component allows browsing by hierarchical metadata fields. The taxonomy fields available are setup in the user or group administration pages.

Color Search Component

The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

Graph Search Component

Graph Search can be used to visually drill down on asset metadata. This component needs to be set up by an administrator.

Filtering Options Tab

Destination Workspace field sets a target workspace to which the user will be redirected when a search is performed.

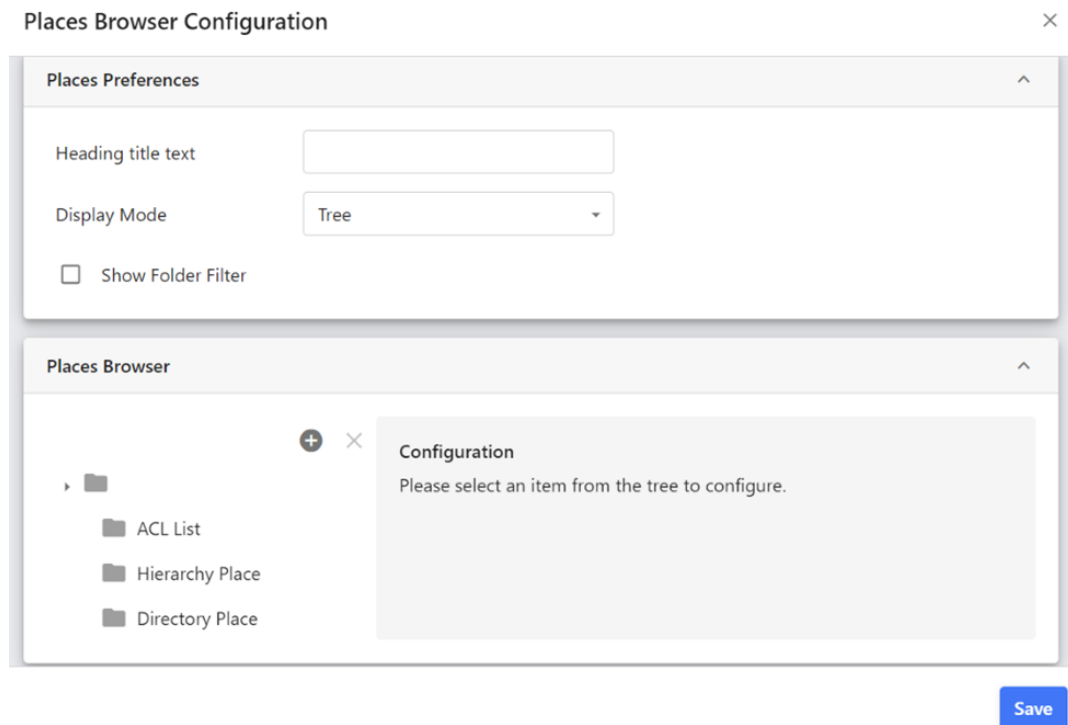
Graph Options

- **Field to Graph:** Selects the field to display on the graph.
- **Graph Type:** Selects the type of graph from the options. The following types of graphs are currently available:
 - Donut, default
 - TreeMap
 - Pie
 - Bar
- **Number of Results:** Selects the number of results to be displayed on the graph. The available number of results are 3,4,5,6,7,10,12,15, and 256.
- **Hide missing values:** Hides the missing values of the field.
- **Hide Legends:** Displays the values without its legend. Users can hover over the graph to see the values.
- **Hide Graph Title:** Hides the title of the graph.
- **Show Graph Labels:** Shows the value of the field as a label on the graph.

Places Browser Component

The Places Browser component is used to provide function shortcuts to the user in a variety of different presentations. A shortcut, or “place” can redirect a user to specific ACL, workspace, directory, saved selection, saved search, and more. These places can be displayed as a in a number of ways: a collapsing tree, a pull-down Menu, buttons, or as tile squares.

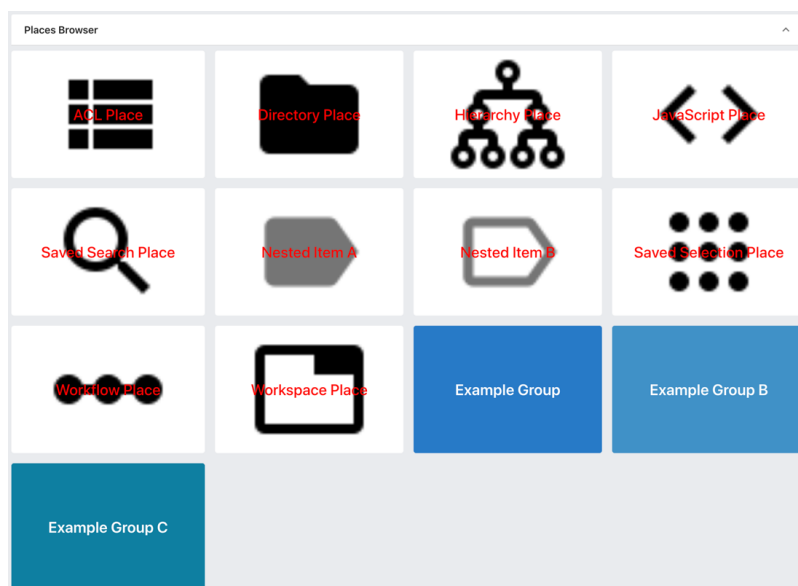
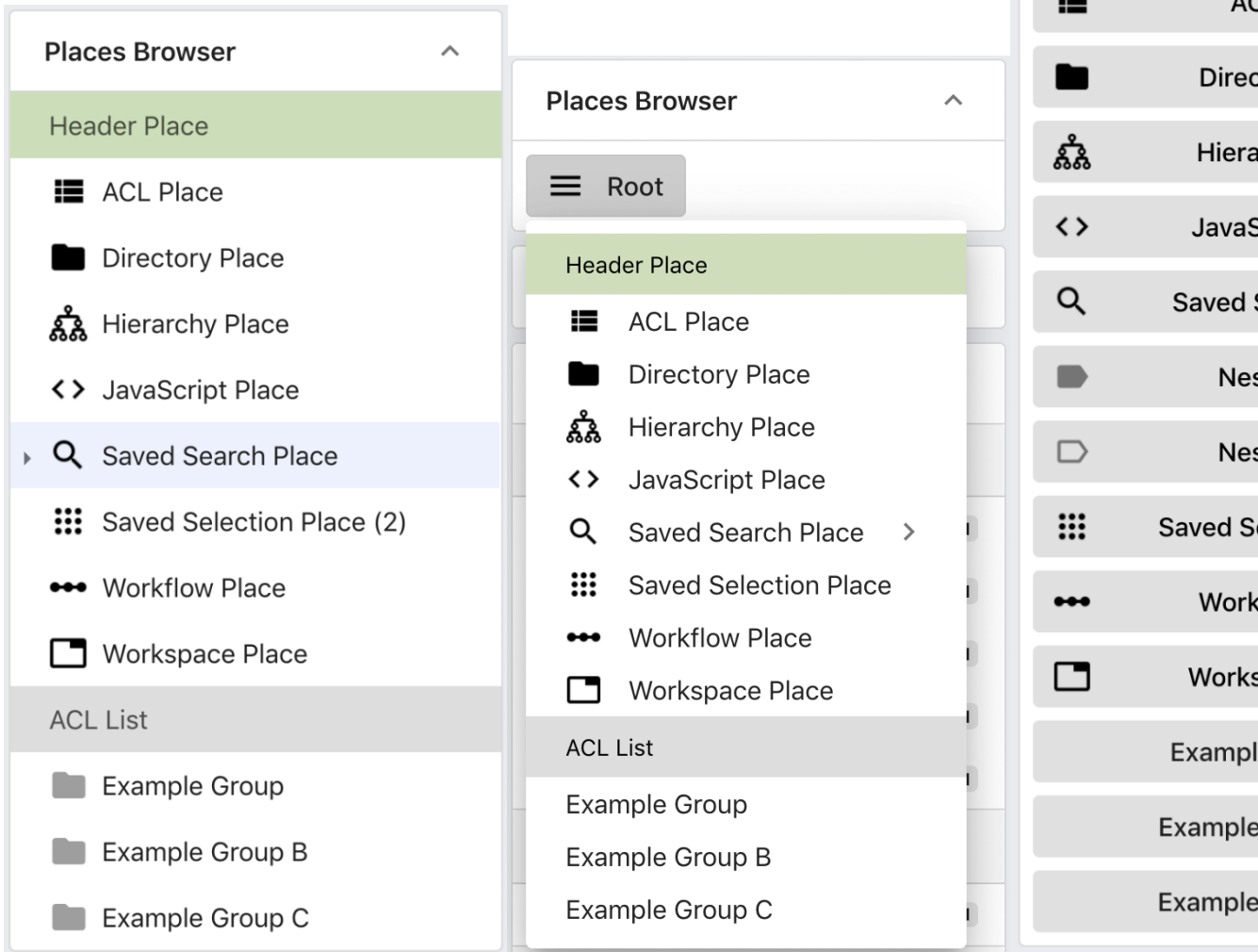
Places Preferences Tab



- **Heading title text:** This text is displayed at the top of the list of places in all display modes.
- **Display Mode:** This chooses the display mode of the places defined in the Places Browser tab (see below). Note that not all place types can be displayed in every Display Mode. See each Place Type for these restrictions.

Display Modes:

- **Tree:** Displays places as a “folder tree”
- **Menu:** Displays places as a multi-level menu
- **Button:** Displays places (including nested places) as buttons
- **Tile Square:** Displays places with larger icons, and in a regular grid, up to 4 columns wide



- **Show Folder Filter:** This option is only present in Tree Display Mode. It displays a filter field above the list of places, which filters the displayed trees.

Place Types Configuration

In general, each item under the Root Place generates a static place in the Places Browser. Some places do have Dynamic functionality such as the Directory place or the ACL List place.

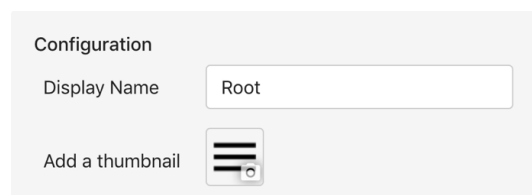
Common Properties

These properties Perform the same function per place and are described here for brevity.

- Display Name: Defines a place's label in the Web UI.
- Add a thumbnail: Defines the places icon in the Web UI. Uses the Standard Icon Picker. If no custom thumbnail is defined, a place will use the standard folder icon.
- Destination Workspace:
 - An optional setting for some place types that redirect a user to another workspace in addition to those places' regular function.
 - No redirection occurs until a workspace is selected via the pull-down menu.
 - A defined workspace may be cleared with the "X" button.
 - If a workspace is defined that is not available to a given user's current ACL, the place will redirect them to the leftmost workspace in their current ACL.
 - It is incumbent upon the configuring Global Administrator to understand what workspaces the users of this place have access to prevent misconfiguration.

Root Place

The "root" place is the containing element of other places. It only becomes a Web UI element for users if the Places Browser is in Menu Display Mode. In this state, it is displayed as a menu header that is clicked to show the Places Browser as a pull-down menu.




- Common Properties: Display Name, Add a thumbnail.

ACL Place

Creates a place that changes the user's current ACL, in the same manner as an ACL listing in the user menu.

Configuration

Display Name

Add a thumbnail 

Destination workspace

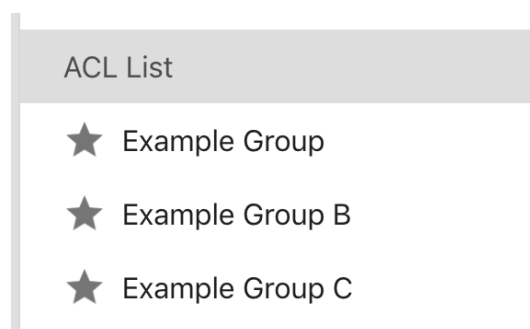
Available ACL's:

- Common Properties: Display Name, Add a thumbnail, Destination Workspace.
- Available ACL's: The value chosen in this pull-down field defines the ACL a user will be redirected to when the ACL place is clicked.
 - If a user does not have access to the defined ACL place, the current ACL will be reloaded.
 - The list of ACLs available in this pull-down menu are those available to the Global Administrator who is configuring the component, NOT the list to which any given General User would necessarily have access. It is recommended therefore, that a Global Administrator be a member of all Groups/ACLs that would need to be defined as ACL Places (or simply all of them, if feasible). It is incumbent on such a Global Administrator to have an understanding of which users will be exposed to this Place and what the disposition of their ACL memberships are.

ACL List Place

This place generates a dynamic list of the ACL's currently available to the user, appearing as individual places. One limitation is that custom ACL icons are not inherited, instead all ACLs on the list inherit the icon of the ACL List Place itself.


Figure 15: List of ACLs generated by the ACL List Place. Note, the "ACL List" row with the gray background is a Header Place, for aid in labelling the list of ACLs.



- Common Properties: Display Name, Add a thumbnail, Destination Workspace

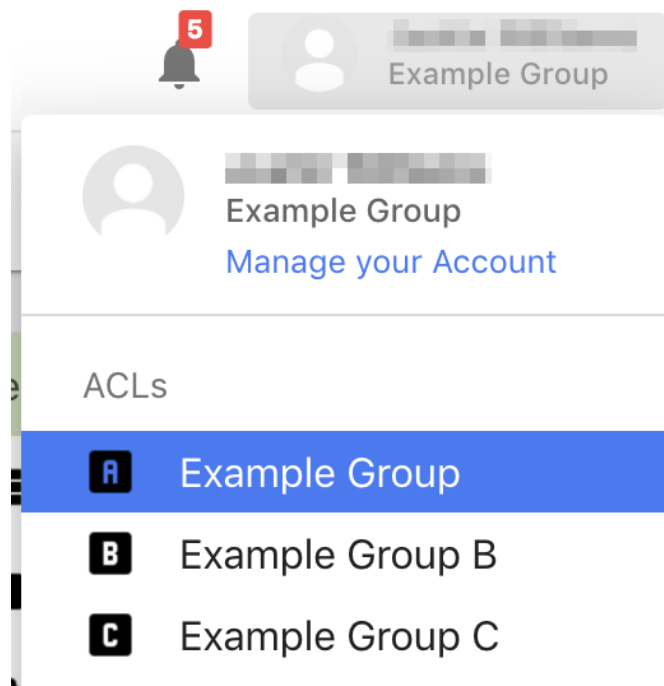
Configuration

Display Name

Add a thumbnail 

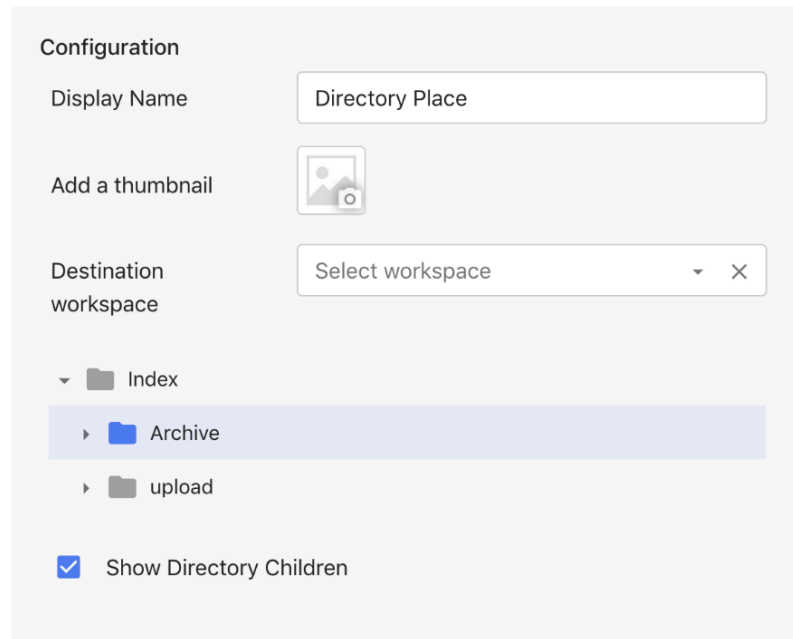
Destination workspace ▼ ×

Figure 16: The ACLs as listed in the User Menu. Note that ACL icons are not inherited by the ACL List Place.

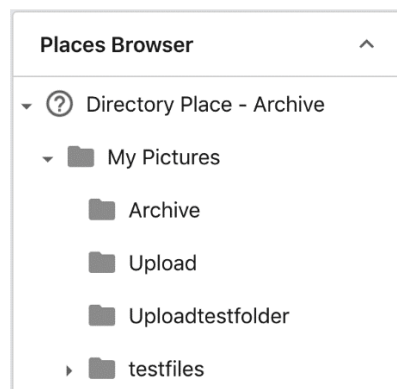


Directory Place

A Directory Place is used to provide access to specific folders and optionally, their contents. Clicking on a Directory Place will set the folder's location as the current search criteria, as though it was selected in the Directory Browser, although no directory browser component needs to be present.

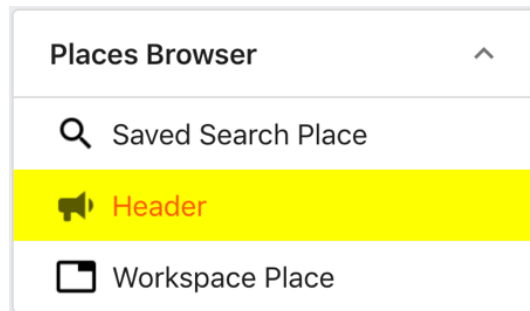


- Common Properties: Display Name, Add a thumbnail, Destination Workspace
- Directory Chooser: Highlighting a directory here sets the directory place’s “root” directory. This set the directory the place will use.
- ACL Root Considerations
 - Directories are assigned as an absolute path, and not relative to a user’s current ACL Root Path. This means that to a user who does not have access to the assigned directory, such a place will be grayed out and nonfunctional.
 - When a Global Administrator is assigning a directory to a Directory Place the “Index” Directory will match their current ACL Root Path. For this reason, it is suggested that Global Administrators use an ACL that is unrestricted while configuring directory places.
 - It is incumbent upon a Global Administrator to be aware of the ACL Root Paths of the intended users of Directory Places, so that directory assignment will be functional for all those users.
- Show Directory Children:



When enabled, a Directory Place will display its subordinate directory structure when the folder spin-down icon (a triangle icon to the left of a directory's icon) is clicked. This includes all subdirectories.


Header Place





A header place generates a nonfunctional label that serves to separate places. It is only visible in the Tree Display mode.

Configuration

Display Name

Add a thumbnail 

Font Color  ×

Divider Color  ×

- Common Properties: Display Name, Thumbnail
 - Unlike other places, a header does not have a default icon, but can be assigned one if desired.
- Font Color: Defines the font color header place's display name.
- Divider color: Defines the background color of the row in which the header place is resident.

Hierarchy Place




Note: To provide users with click-to-search-functionality, it is considered best practice to use a Filter Search component rather than a set of hierarchy places.

Hierarchy Places perform a search for a predefined dictionary term in a hierarchical dictionary field. Each Hierarchy Place searches for a single term.

Configuration

Display Name

Add a thumbnail 

Destination workspace

Select a Field

Select a Value


- Common Properties: Display Name, Add a thumbnail, Destination Workspace.
- Select a Field: This property defines the field that will be searched. Only Hierarchical Force Dictionary fields are listed.
- Select a Value: This property defines the value that will be searched from the extant values in the dictionary attached to the field as defined above.

JavaScript Place

This place executes a predefined block of JavaScript.

Configuration

Display Name

Add a thumbnail 

```

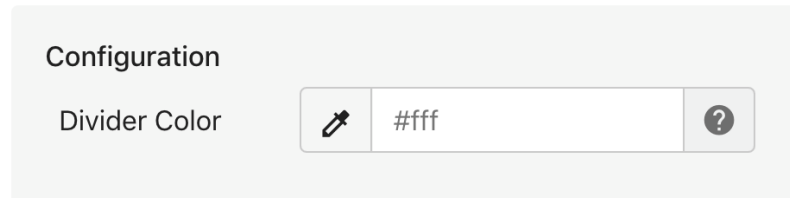
1  parent.MBAPI.goHome();
2
3

```

- Common Properties: Display Name, Add a thumbnail
- JavaScript Block: Defines the JavaScript executed upon click.

Divider Place

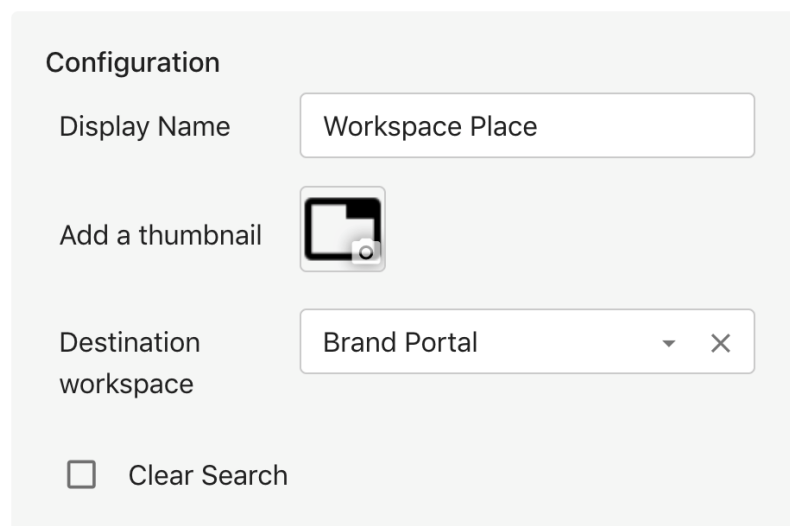
The divider place will display a row with a one-pixel high divider line in it in Menu and Button display mode.



- Divider Color: Defines the color of the dividing line.

Workspace Place

This place redirects the user to a given workspace.




- Common Properties: Display Name, Add a thumbnail, Destination Workspace.
- Clear Search: When enabled, this option clears the search criteria upon workspace change.

Saved Search Place

This place loads a given saved search.

Configuration

Display Name

Add a thumbnail 

Destination workspace ▼ ×

Search within current results

Available Searches ▼ ×

- Common Properties: Display Name, Add a thumbnail, Destination Workspace
- Search Within Current Results: If this option is checked, a saved search place will add its search criteria to the current search criteria, rather than replacing it.
- Available Searches: This field defines the saved selection used for this place.




Note: It is considered Best Practice to use Admin Saved Searches for Saved Search Places since they cannot be changed by general users.

Saved Selection Place

This place loads a specific saved selection, which may be either be a User Defined Saved Selection or a MediaBeacon default, such as “Last Upload” or “My Cart”. Additionally, the number of assets in the selection will be automatically be displayed in parentheses to the right of place’s name.

Configuration

Display Name

Add a thumbnail 

Destination workspace ▼ ×


Available Selections ▼ ×

- Common Properties: Display Name, Add a thumbnail, Destination Workspace.
- Available Selections: This field defines the saved selection used for this place.

Workflow Place



Configuration

Display Name

Add a thumbnail 

Workflow to execute:

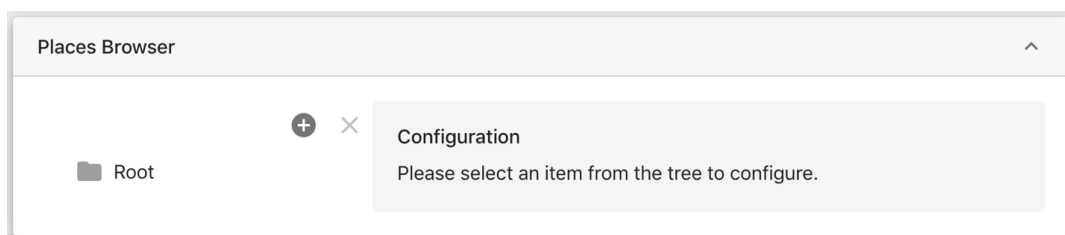
- Common Properties: Display Name, Add a thumbnail, Destination Workspace
- Workflow to execute: This field defines the workflow that is executed when this place is clicked.

-  **Note:** Only Visual Workflow, or a JavaScript Workflows that the “Enable Client-Side Triggering” property enabled are selectable in this list.
-  **Note:** If a user’s ACL contains the Permission Restriction “Trigger Workflow”, They will not be able to execute any workflows regardless of Places Browser configuration.

Places Browser Tab

This tab allows the administrator to configure the list of places in the browser.

Places are structured in an arbitrary hierarchy, each place being able to contain any number of other places. The functionality of places is not affected by their arrangement inside other places.



In an un-configured state, this tab shows:

- The Root place: This is the containing object for other places, it is normally not displayed, except in Menu mode.
- Add Place button: when clicked, this button displays a contextual menu that lists all the types of place that can be added. When adding places.
- Delete Place button.
- The Place Configuration panel: This area shows available configuration properties of the selected place. Places have some properties that are unique and some common to all places.

Adding and Removing Places

- To add a place, click the “+” button and choose a place from the menu. The new place will be added as a nested item under whichever place was selected. If no place was selected, it will be added under the root place, at the end of the list of top level places.



Note: When adding places to a places browser for the first time, the Global Administrator may need to spin open the Root place to see newly added places. So it is generally advisable to click the root place before adding initial places.

- To remove a place, select it and click the “X” button in the upper left corner of the place list.



Note: Newly added places will not appear in the places browser unless they are fully configured. That is, the main option for that place type has been configured (such as selecting a saved search for use in a saved search place) AND the name is changed from the default display name.

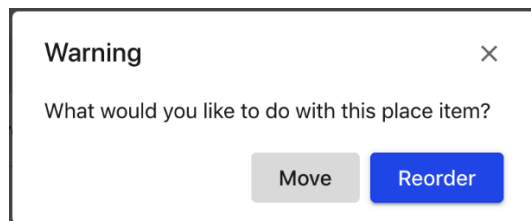


Note: When changing the names and icons of places in the Places Browser Configuration Dialog, those changes may not display in the Configuration Dialog until after the “Save” button is pressed OR the Global Administrator clicks on another place and then back to the just-edited one.

Reordering and Nesting Places

Places may be arranged into arbitrary hierarchical structures using drag-and-drop to reorder or nest a place within another. Only one place may be dragged at a time.

- Drag and Drop onto Sibling Place:** When a place is dragged-and-dropped on top of another place that is a sibling of the dragged place (that is, on the same level in the hierarchy), a “Warning” dialog is displayed.



- Nesting:** Clicking “Move” will move the dragged place into the target place. It will be automatically nested into that target place, at the end of the list of any extant places.
- Reordering:** Clicking “Reorder” will rearrange the order of places. Whether the dragged place will be ordered before or after the target place is contingent on its previous position. If the dragged place had been above the target before the drag, it will be positioned below the target once dropped, and vice versa for the converse case.
- Drag and Drop onto Non-sibling Place:** If a place is dragged-and-dropped to a target place that is NOT its sibling, it will be automatically nested into that target place. This includes the Root Place.

Metrics Component

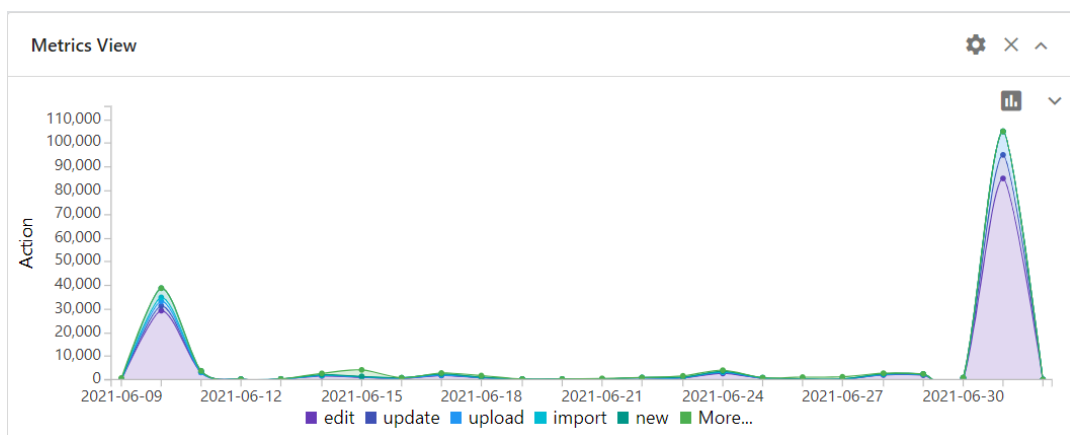
Metrics Component displays MediaBeacon usage metrics. Adding this component to a workspace will cause only metrics data to be displayed in the workspace. Using this component on a workspace dedicates it to the metrics functionality.

This component's functionality is changed by other components and changes the function of other components, specifically the Filter Search, and the results shown by any View Component.

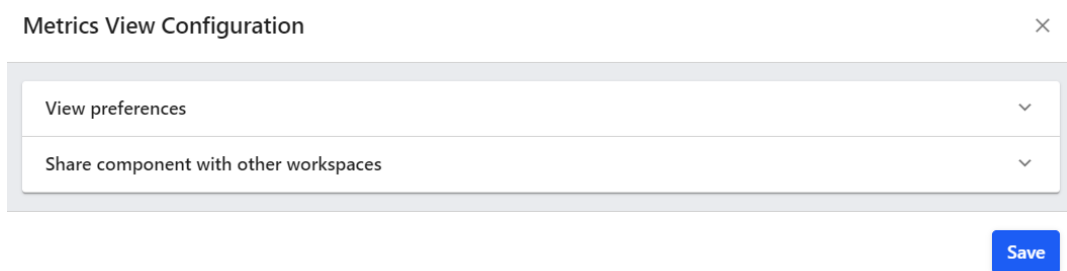
As such, it is best to add a "Metrics" workspace (via the Add Workspace dialog) so that other properly configured support components are present.

Filter Search Dependencies

- **Field Switcher:** This list shows the fields which can be used with the stack graph function. This list is determined by the Facets defined in the workspace's Filter Search. In addition, the stack graph function only works with fields from the "MediaBeacon Metrics" schema. Please see the Appendix for a listing of these fields.
- **Number of X-Axis Terms Displayed:** X- Axis Values: The number of values displayed is dependent on the Filter Search's "Number of Results".



Metrics Component Configuration

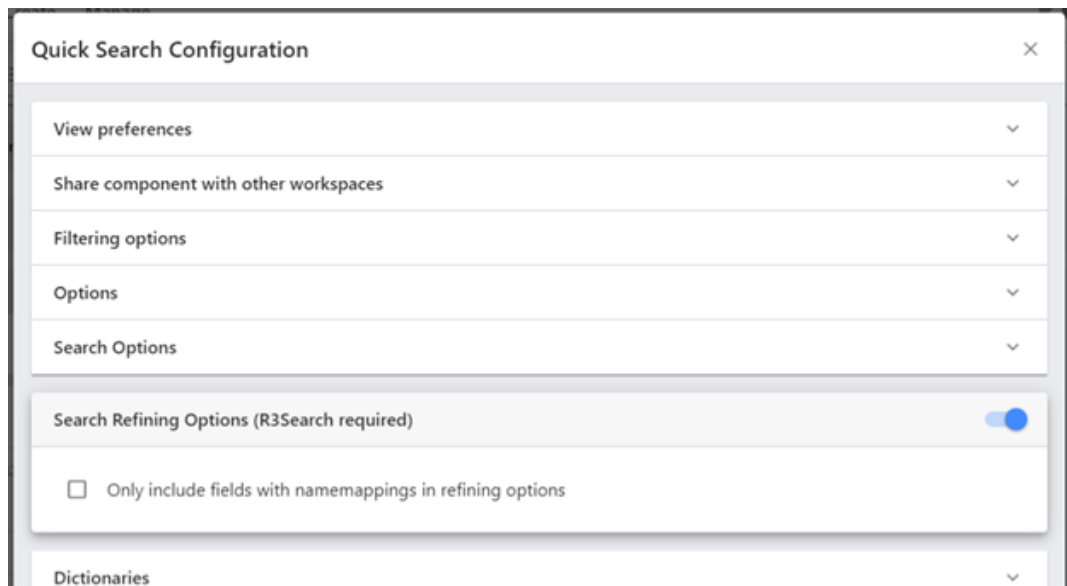


The configuration dialog box has a title "Metrics View Configuration" and a close button (X). It contains two sections: "View preferences" and "Share component with other workspaces", each with a dropdown arrow. A blue "Save" button is located at the bottom right.

The Metrics component has no configurable options.

The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

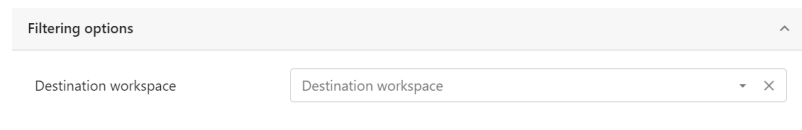
Quick Search Component



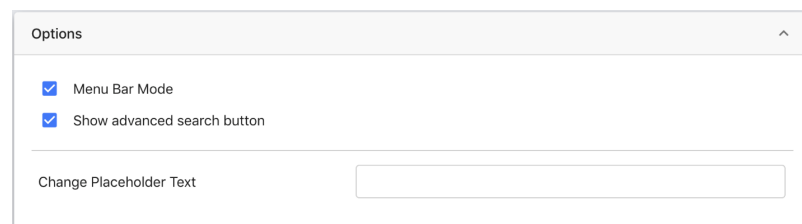
The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

Filtering Options Tab


Destination Workspace field sets a target workspace to which the user will be redirected when a search is performed in the Quick Search component.



Options Tab



- **Menu Bar Mode:** Disabling this checkbox causes the Quick Search component to operate as a regular component. It will be “undocked” from its normal place on the workspace, will appear in the Layout Area, where it can be moved to any desired Layout Zone.

- 
Note: It is recommended that if the Quick Search is put back into Menu Bar Mode, it should be in the left layout zone column first. This is because this layout zone is the default location in the page structure for a Quick Search component even when displayed in the Search Bar area with the Menu Bar Mode option.

- Show Advanced Search:** When enabled, this option displays the Advanced Search button. See the [Advanced Search Dialog](#) section for more information on Advanced Search functionality.
- Change Placeholder Text:** By default, the Quick Search field displays “Search” until the user begins entering text. The string here will replace that default value.

Search Options tab

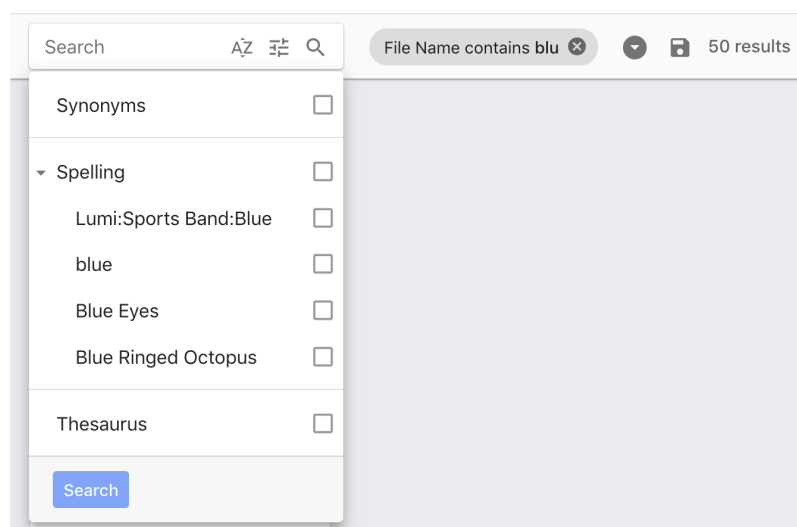
MediaBeacon allows various search options for the user. You can configure these options by checking the boxes beside each option.

Search Options ^

- Show Alternatives
- Search Synonyms
- Search Thesaurus
- Bidirectional Searching (slower)
- Use R3Search for typeahead suggestion engine
- Use dictionary for typeahead suggestion engine

Show Alternatives

When enabled, this option enables the Alternatives Menu in the Quick Search field. This menu is hidden until a search has been performed. This menu displays sections for values in dictionaries that closely match the current search criteria. It will display Synonyms, Spelling and Thesaurus entries, which spin down to show values from those columns of dictionaries.



When one or more of the terms' checkboxes are enabled, the user may then click "Search" and those terms will be added to the current search criteria.

Search Synonyms & Search Thesaurus

When enabled, this allows entered search criteria to return assets that are tagged with synonym (and or thesaurus) terms. There are two ways to implement this behavior: duplicated synonyms and non-duplicated synonyms.

- The duplicated synonyms model assumes that dictionary will duplicate some values in a dictionary's Word/Spelling field, using them to populate the synonym field of another entry.

Figure 17: Duplicative dictionary

Color Descriptors			
		<input type="text" value="Add new word"/>	<input type="button" value="Add"/>
Image	↑ Words	Synonyms	Thesaurus
	blue		
	crimson		
	green		
	indigo		
	orange		
	red	crimson	
	violet		
	yellow		

of 1 > > | 1 - 8 of 8



Note: "crimson" is listed under Words and Thesaurus.

- The non-duplicated model assumes that no Word/Spelling field value will match any synonym field value in that dictionary.

Figure 18: Non-Duplicative dictionary

Color Descriptors		Add new word	×	Add
Image	↑ Words	Synonyms		Thesaurus
	blue			
	green			
	indigo			
	orange			
	red	crimson		
	violet			
	yellow			

|< < 1 of 1 > >| 1 - 7 of 7



Note: Using the non-duplicative model is vastly more popular option and is considered a best practice. Keep in mind that to use this model properly, the dictionaries must be set up correctly and the “Bidirectional Searching” option MUST be enabled. Using this model better enforces controlled vocabulary, preventing terms proliferation and misuse.

Bidirectional Searching

As stated above, this allows non-duplicative dictionaries (the best practice) to be used with synonym searching.



Note: This options is DISABLED by default, and is almost always needed for expected synonym searching behavior.

Use R3Search for typeahead suggestion engine

This option enables the typeahead function, using values that are currently written into assets on R3Search Indexed fields.

Use dictionary for typeahead suggestion engine

This option enables the typeahead function, using values found in all dictionaries in the system.

Search Refining Options Tab



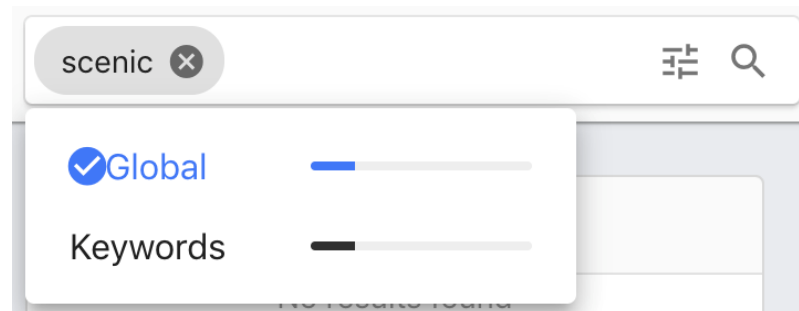
Note: To enable this option, it is required that the tab itself be open when “Save” is clicked on the Configuration dialog.

Search Refining Options (R3Search required)

- Only include fields with namemappings in refining options

The Search Refining option is similar to the standalone Search Refining component. When enabled, when a string is entered in Quick Search, and a comma or return are entered, the term will be surrounded by a capsule element, and a dropdown menu will be displayed.

In the Search Refining Menu, the relative frequency of assets that contain the term on a given field is shown as a small bar graph.



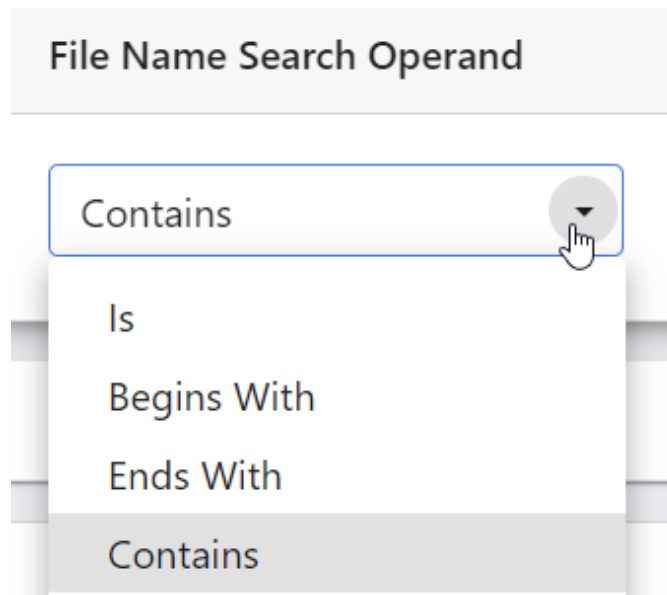
The “Global” entry displays how many assets contain the term in all fields. In this example, the value “scenic” appears to only exist in the keywords field, indicated by the global and keywords entry showing the same relative proportion of assets.

- Only include fields with name mappings in refining options: This option is deprecated and has no function in MediaBeacon v20.x and higher.

Dictionaries Tab

Dictionaries chosen in this multi-value selector define the dictionaries that Are used for synonym searching. By default, all dictionaries are used (per the All Dictionaries Selection) but individual dictionaries can be chosen from the selector. The All Dictionaries selection clears individual dictionary assignments. If this selector is left blank, synonym searching will not function.

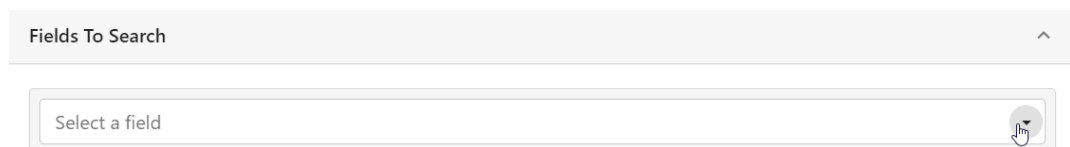
File Name Search Operand Tab



By default, Quick Search searches file names, using the “Contains” setting, meaning that the entire file name is searched, including file extension. This tab’s other settings can change the matching criteria:

- Is: Filenames must be an exact match for the entered search string.
- Begins With: Filenames must begin with the exact entered search string.
- Ends With: Filenames must end with the exact entered search string, including file extension.

Fields To Search Tab



This option, left blank by default, changes the Quick Search component’s behavior. Normally Quick Search returns results from all indexed fields, indexed text, and file names. When the Fields To Search pull-down is populated with one or more fields, the Quick Search will be limited to returning results on only the specified fields instead of all indexed fields.

Collections Component

Collections Configuration
✕

View preferences ▼

Share component with other workspaces ↗

Configuration ▲

Show collection filter
 Exclude selections with prefix:

Save

- **Show selection filter:** This option toggles the display of the filter field from the top of the collections component.
- **Exclude selections with prefix:** When enabled, the entered string is used to hide collections containing that string in their names.



Note: Note that this filtering is done as a prefix, so it will only filter collection names that have the specified string at the beginning of their names

The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

Filter Search Component

Filter Search can be configured to filter assets based on metadata values.

Filter Search Configuration ✕

View preferences ▼

Share component with other workspaces ▼

Filtering options ▼

Global options ▲

- Show selected values
- Show empty fields
- Hide value counts
- Always show filter box
- Hide facets until a search is performed
- Accordion mode

Facet filtering fields ▼

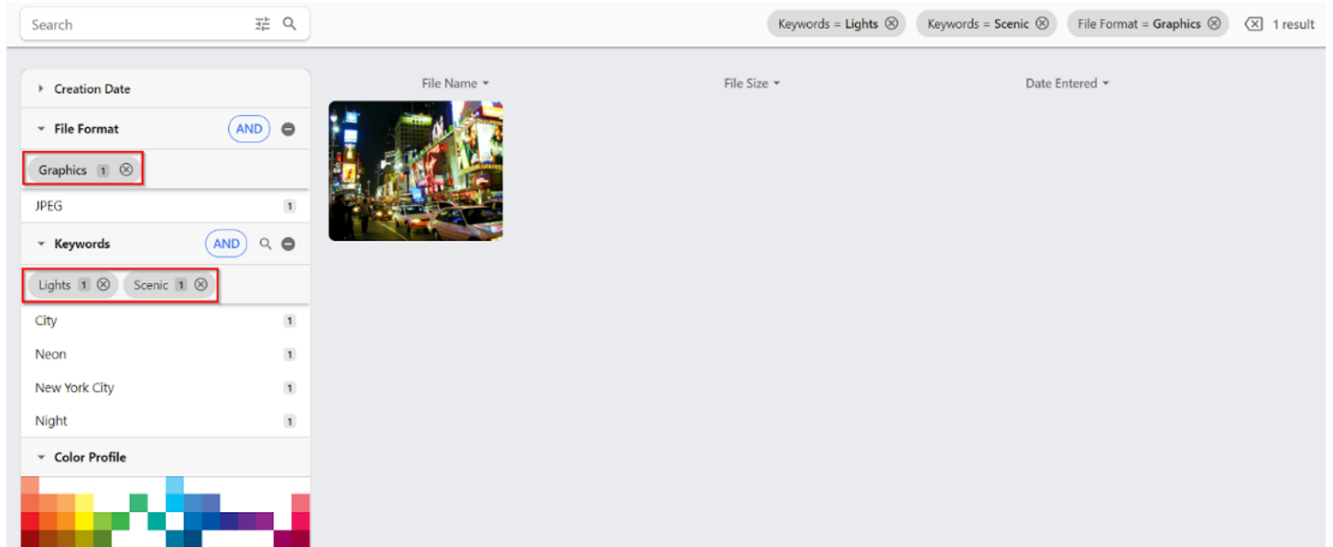
Save

Global Options Tab

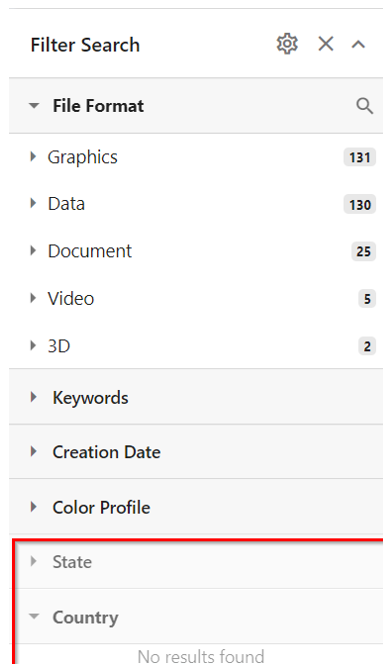
Global options ▲

- Show selected values
- Show empty fields
- Hide value counts
- Always show filter box
- Hide facets until a search is performed
- Accordion mode

- **Show selected values:** When a search is performed, Show selected values option will display the filter value selected below each field.



- **Show empty fields:** When Show empty fields is selected, the fields with no values/empty fields will be displayed along with other fields. Users cannot open the empty fields and are also displayed in grey color.




When users add some value to the field, the fields will be opened to show the metadata.

▸ File Format
▸ Keywords
▸ Creation Date
▸ Color Profile
▼ State
Minnesota 1
▼ Country
Usa 1


- **Hide value counts:** Hides the value of the metadata.

Filter Search ⚙ × ^

▸ Creation Date
▼ File Format 🔍
▸ Graphics
▸ Data
▸ Document
▸ Video
▸ 3D
▼ Keywords 🔍
Scenic
Bulkaddme
Replaced
Test
1
▼ Color Profile


When you deselect Hide value counts, the total number of the metadata will be displayed next to each metadata added in the fields.

Filter Search ⚙️ ✕ ^

- ▶ Creation Date
- ▼ File Format 🔍
 - ▶ Graphics 124
 - ▶ Data 90
 - ▶ Document 14
 - ▶ Video 4
 - ▶ 3D 2
- ▼ Keywords 🔍
 - Scenic 15
 - Bulkaddme 8
 - Replaced 8
 - Test 5
 - 1 2
- ▼ Color Profile
 

- **Always show filter box:** The search filter box is displayed to search a value below every field.

Filter Search ⚙️ ✕ ^

▼ **File Format**

Enter or Paste Search Terms ✕

- ▶ Graphics 131
- ▶ Data 130
- ▶ Document 20
- ▶ Video 5
- ▶ 3D 2

▶ **Keywords**

▼ **Creation Date**

Enter or Paste Search Terms ✕

- 2006-12 8
- 2003-07 3
- 2007-07 3

By default, the filter is not displayed. To open the filter, click Browse values next to each field name.

- **Hide facets until a search is performed:** Filter Search is not displayed on the Web UI until a search is returned.

Search 🔍 File contains minnesota ✕ 9 results

▶ Creation Date

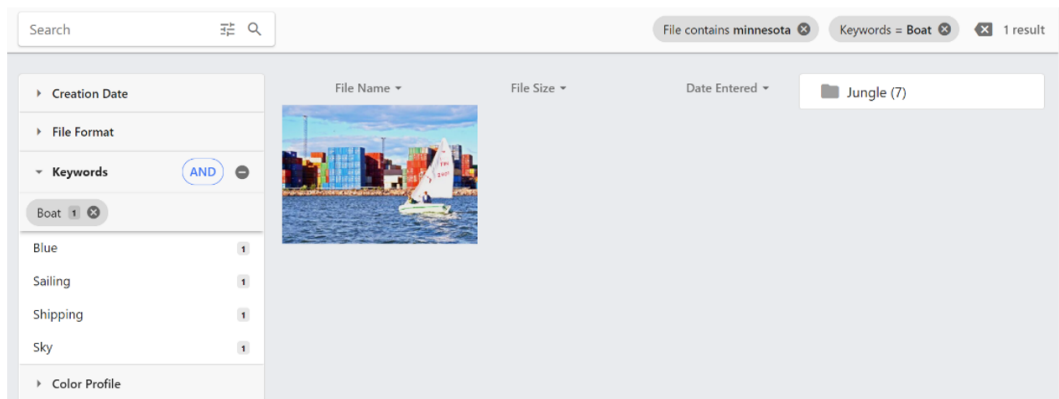
▶ File Format

▼ **Keywords** 🔍

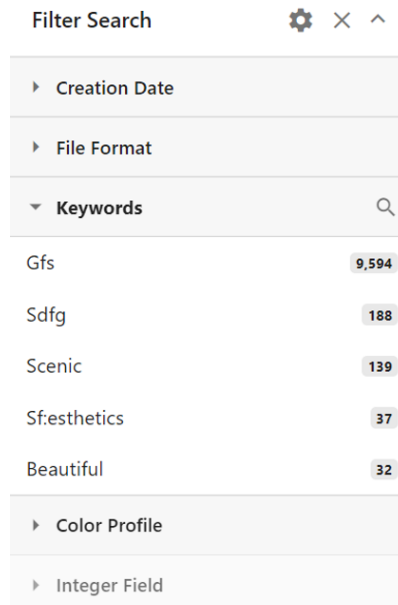
- Sdfg 2
- Blue 1
- Boat 1
- Sailing 1
- Shipping 1

▶ Color Profile

File Name ▾ File Size ▾ Date Entered ▾ Jungle (7)



- **Accordion mode:** When Accordion mode is selected, only the selected field and values will be opened. Other fields will remain closed.



Facet Filtering Fields

- **Select a field:** To add a field as to the Filter Search, click on “Select a field” and choose from the dropdown. If a field is greyed out, this indicates is not indexed in SQL. This does not have a significant performance impact on the system, it is simply informational.

The area below Select a field displays currently added fields and their arrangement, top-down corresponding to left-right, and allows each Filter Header to be configured

- **Setting Filter Header Order:** Fields can be rearranged by placing the cursor to the left of the field name. When the hand cursor changes to a moving cursor then, drag the field to the desired place.

- **Removing Filter Headers:** To remove a filter header, click the “X” button to the right of a field name.
- Clicking on a given field’s name will display per-field configuration in the Field Options area.

Facet Filter Configuring Options

When configuring filter search fields, each field has a number of configurable properties. When the name of a specific filter search field is clicked, the options for that field are displayed below the Filter options.

String & Multi-value Field Options

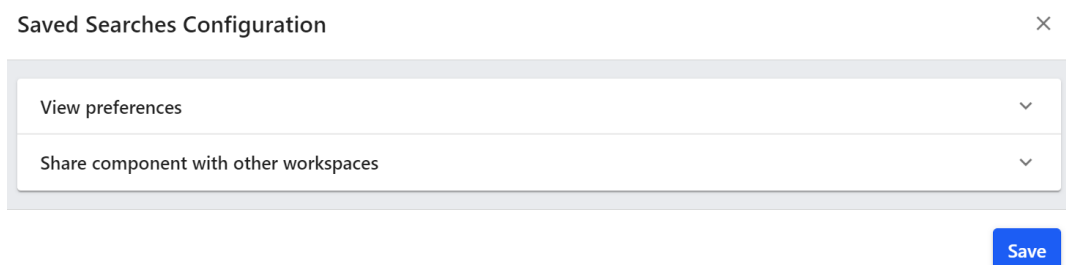
- **Default Conjunction:** Sets the Default Conjunction used between terms selected filter search field.
- **Disable dropping to tag:** Disables the drag and drop option to add assets to a metadata.
- **Number of Results:** Limits the number of values shown initially in the Filter Search.
- **Sort Results:** Assets' sort order is set here, by either Relevance (frequency), Alphabetical and Reverse alphabetical.
- **Max Scroll Height:** Sets the Max Scroll Height of the field. If the given value is more than 300 (default), this feature is deprecated, and has no effect.
- **Date Field Header Options**
- **Dynamic ranges** (Today, last month, etc.)
- **Display as hierarchy:** Displays the field in ascending order.
- **Display as calendar:** Displays the Creation Date field as a calendar.
- **Color for frequency** (not currently functional)
- **Start Date:** This option allows to choose the starting date.
- **End Date:** This option allows to choose the ending date.
- **Gap:** The gap between the assets' Date Entered can be selected from the following options:
 - 1 Month
 - 3 Months
 - 1 year

Apply Sort Order

This section of the field properties enables a "default sort order" to be set for the filter search field. When enabled default sort order for a particular field, select Apply sort order and choose the field from the dropdown.

- **Enable:** This toggle enables the sort order off and on.
- **Order By:** This sets the field by which the View component's assets will be sorted.
- **Sort Ascending:** Sorts the View component's assets in ascending order by the chosen "Order By" field.
- **Sort Descending:** Sorts the View component's assets in descending order by the chosen "Order By" field.

Saved Searches Component



The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

Featured Content Component

Featured Content component displays content from an arbitrary source with paging. For example, this component can be used to help your brand highlight any specific content for the users.

Content Source

A content source must be defined for the assets shown in featured content.

- **Collection:** The content will be retrieved from the Saved Collections. Users can select a collection from the dropdown.
- **Saved Search:** The content will be retrieved from the Saved Searches. Users can select a saved search from the dropdown.



Note: Only one option can be selected as the source.

- **Order By:** Selects a field from which the source is sequenced.
 - Sort Ascending
 - Sort Descending

Configuration

Display Mode: The following display modes are augmented currently,

- **Landing Page:** The content will be displayed as the background of the workspace.
 - **Fields Displayed on Bottom of Landing Page:** Selects a field to be displayed on the bottom of the page.
 - **Enable animation:** Enabling this provides the user with a field in which the interval time can be configured.
 - **Interval:** Enters the interval time in milliseconds.
- **Tile Square:** Displays each asset without its name fitting within a square tile (showing the center of the asset).
- **Tile Fit:** Displays each asset and its name in a tile element similar to asset presentation in MediaBeacon's Tile view component.
 - **Number of rows to display:** Defines the number of tiles shown vertically within the featured content component.
 - **Destination Workspace:** Defines the destination workspace used when a user clicks on an asset within the Featured Content component.
 - **Workspace:** Selects a destination workspace from the dropdown.
 - **Link Name:** Renames the component name.

5.3.4. Action Components

Below details various Action Components of MediaBeacon. (Some components are under construction.)

- **ACL Selection:** Shows the available ACLs in a panel which the user can select. Refer [ACLs](#)

- **Cart:** This component allows a user to drag assets from a view component, such as Tile View, and drop them into a cart. A cart can be saved as a new selection or be set as the current selection. Refer [Cart Component](#).
- **Conversions:** This component allows for assets to be sent to the loading dock for processing. It can also be added to the action palette at the bottom of the page. Refer [Download Conversions](#)
- **Metadata Stamper:** This component allows a user to create an Form stamp that can be used to easily update assets' metadata. [Metaform Stamper](#)
- **Navigation:** Component to display workspaces in some form. Used to navigate to different pages within MediaBeacon.
- **Trash:** A component to drag items onto to delete them.

Trash Component Configuration

The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

5.3.5. View Components

Below details various View Components of MediaBeacon. (Some components are under construction.)

- **Infinite Scroll View:** View component which displays a page of assets with scroll. Once bottom of scroll is reached, a new page is added to the bottom of the container, so the user can keep scrolling to new pages.
- **List View:** Spreadsheet style text view with Editable XMP Metadata.
- **Tile View:** Displays a tile view of assets.
- **Video Editor View:** Component for creating/editing videos from video files in the repository.

View Components Overview

View components allow the visualization of assets in several different formats. They also provide access to asset manipulation functions.

Figure 19: Infinite Scroll View

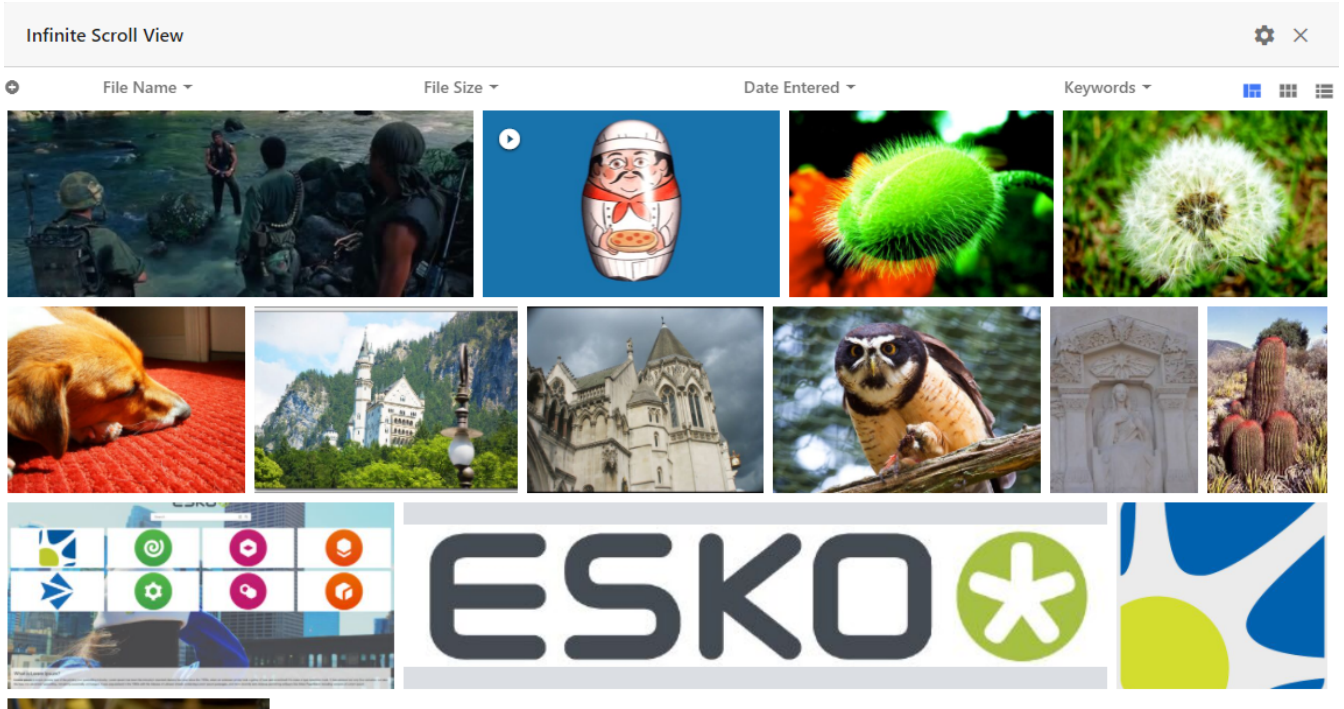
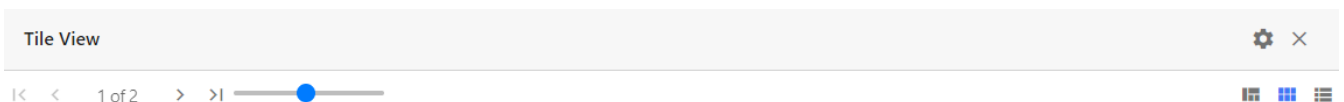


Figure 20: List View

List View				
File Name	File Size	Date Entered	Record ID	
<input checked="" type="checkbox"/> WeSuperLost.mp4	606.68 KB	2021-06-17	207486276	
<input checked="" type="checkbox"/> unnamed_1.gif	818.82 KB	2021-06-17	207486275	
<input checked="" type="checkbox"/> P52402271.jpg	339.25 KB	2021-06-17	207486274	
<input checked="" type="checkbox"/> P51001531.jpg	355.59 KB	2021-06-17	207486273	
<input checked="" type="checkbox"/> P6090034.jpg	282.96 KB	2021-06-17	207486272	
<input checked="" type="checkbox"/> neuschwansteinsmall.jpg	275.55 KB	2021-06-17	207486271	
<input checked="" type="checkbox"/> justicesu8.jpg	207.84 KB	2021-06-17	207486270	
<input checked="" type="checkbox"/> IMG_2614.jpg	255.89 KB	2021-06-17	207486269	
<input checked="" type="checkbox"/> fourviere copy 399.jpg	37.57 KB	2021-06-17	207486268	
<input checked="" type="checkbox"/> cactus.jpg	15.65 KB	2021-06-17	207486267	

Figure 21: Tile View





Delete Icon: Shown on each component, in Admin Mode, this button will delete that given component on the current workspace. Note that shared instances of this component are not deleted by this action.

View Component Fast Switcher: Users can switch between View component by clicking the icon shown in the View Component Fast Switcher that corresponds to each View component present on a



given workspace.

Renaming Components: In Admin Mode: The title text of a component may be changed by double-clicking it in Admin Mode, and entering alternate text, and confirming the change by pressing return.

Shared Vs Non-shared View Component Configuration: View components on the same workspace are never in a “shared” state with other view components (even of the same type) on that workspace. For example, if a particular Highlight configuration is used in a given Infinite Scroll component, another Infinite Scroll component on that workspace would need to have the settings for Highlights matched manually in order to coincide with the first.

Pagination shortcut: Users can move between pages using Shift left/right arrow. This property may not work with infinite scroll view component.

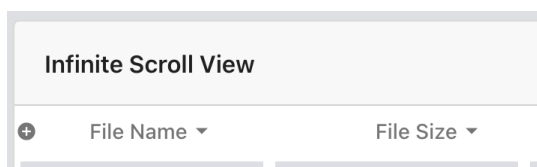
Filter Headers

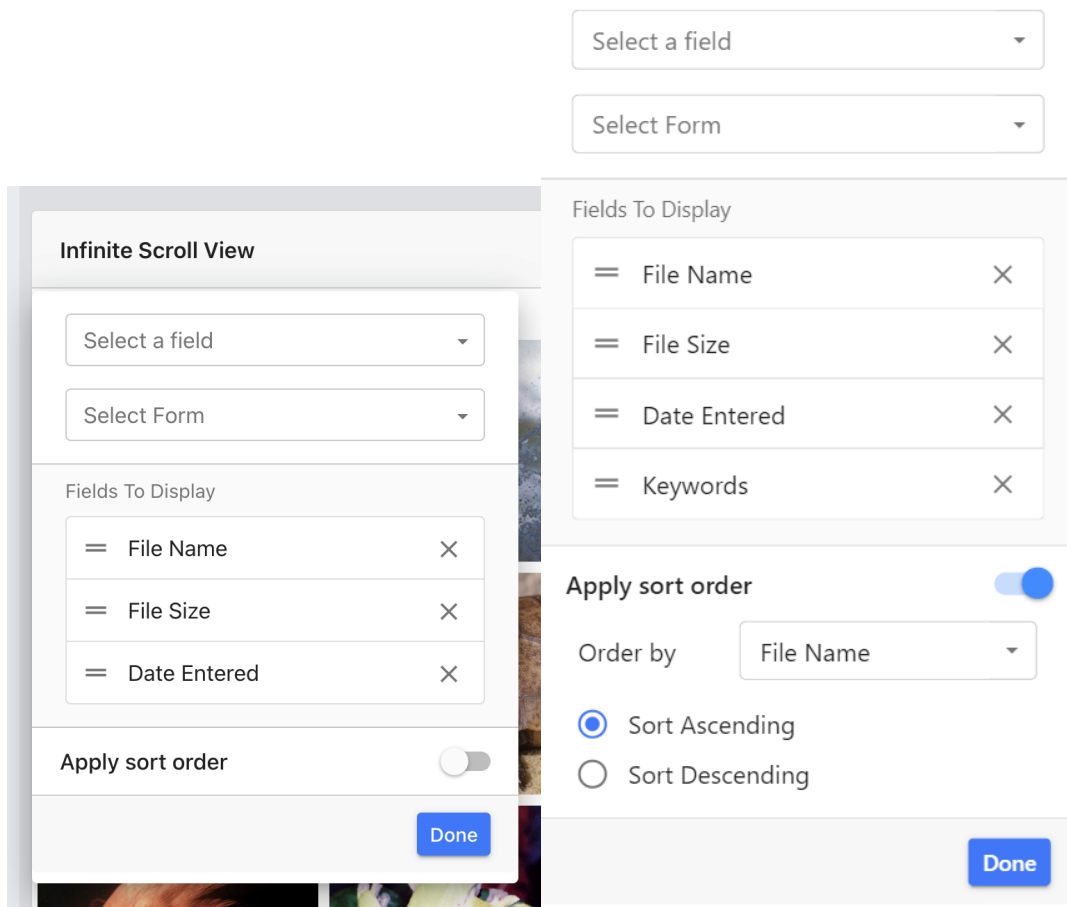
Filter Headers are displayed above the View component’s list of assets. They can be used to sort and filter results. The fields displayed and other Filter Header properties can be configured in Admin Mode.

The options dialog to configure each View Component’s list of Filter Headers is displayed by clicking



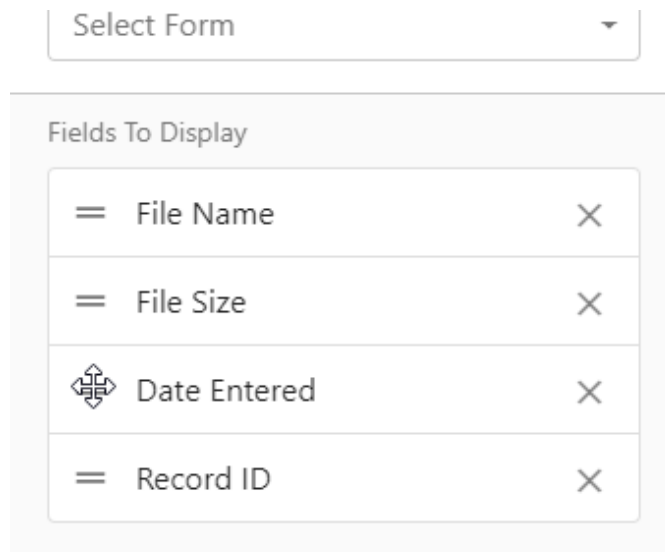
the Options icon, shown to the left of Filter Header field names (while in Admin Mode), in the upper left of a View Component.



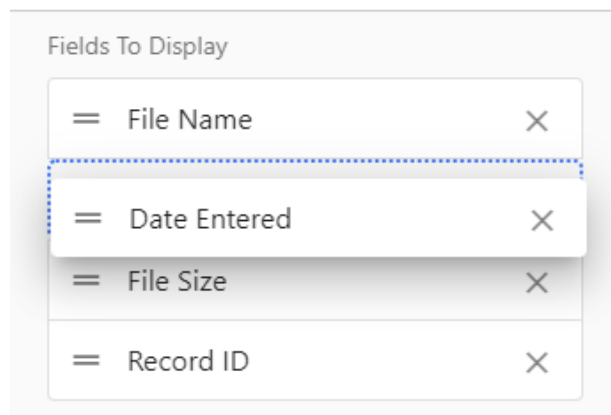


Filter Header Configuration Dialog

- **Select a field:** To add a given as a Filter Header, click on "Select a field" and choose from the dropdown. If a field is greyed out, this indicates is not indexed in SQL. This does not have a significant performance impact on the system, it is simply informational.
- **Select Form:** Choosing a Form here will add all fields on that form as filter headers.
 - **Fields to Display:** This area displays currently added fields and their arrangement, top-down corresponding to left-right, and allows each Filter Header to be configured. Setting Filter Header Order: Fields can be rearranged by placing the cursor to the left of the field name.



- When the hand cursor changes to a moving cursor then, drag the field to the desired place.



- Removing Filter Headers: To remove a filter header, click the "X" button to the right of a field name.

Clicking on a given field's name will display per-field configuration below the "Fields to Display" area.



Note: Additional Filter Headers are most useful on the List View, as the data therein is displayed to the user.

Filter Header Configuration Options

When configuring Filter headers, each field has a number of properties configurable. When the name of a specific Filter Header is clicked, in the "Fields to Display" area, the options for that field are displayed below the "Fields to Display" area.

The nature of these properties can vary depending upon the Type Validator and UI Element of the field.

String & Multi-value Fields

Field Calculation None ▾

Default Conjunction AND ▾

Number of Results 5 ▾

Sort Results

By Relevance

Alphabetically

Reverse Alphabetically

Max Scroll Height 300

Apply sort order

Order by Record ID ▾

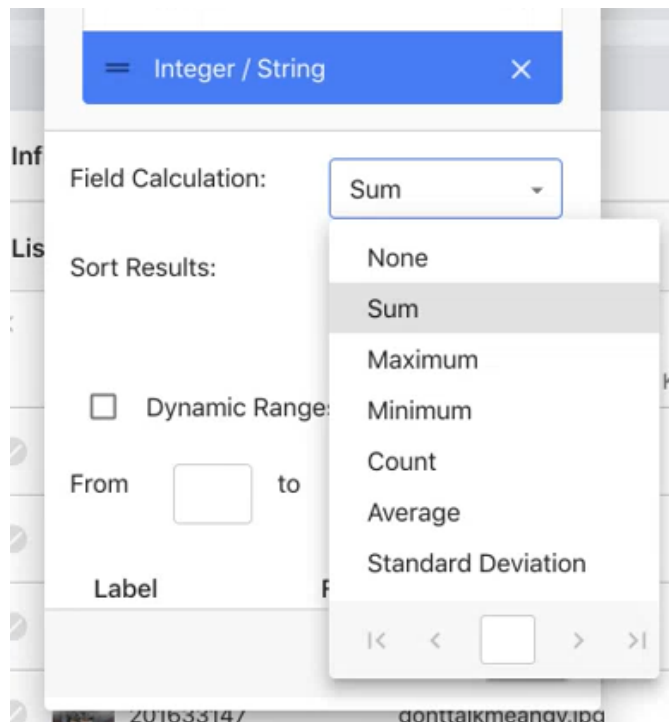
Sort Ascending

Sort Descending











Done

Numeric Fields Options

- Field Calculation: This feature is displayed for all field types, but only had function on the numeric fields (Integer, Positive Integer, Real Number, Positive Real Number, Large Number).



- When a particular calculation is selected, the results are displayed in a row at the bottom of the View component.

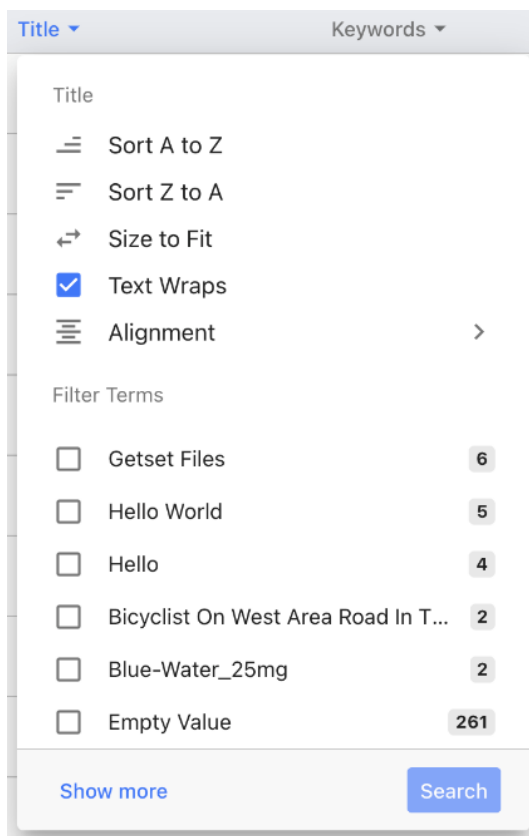
File Name	Integer / String
<input checked="" type="checkbox"/>  vampire-squid.jpeg	37
<input checked="" type="checkbox"/>  bathing_tiger[1].jpeg	38
<input checked="" type="checkbox"/>  amur-leopards1.jpeg	19
<input checked="" type="checkbox"/>  AlbinoCornSnake_6_2009_03.jpeg	209
<input checked="" type="checkbox"/>  397512.jpeg	962
<input checked="" type="checkbox"/>  389715.jpeg	11
<input checked="" type="checkbox"/>  3885552020_73a9d0b034_o.jpeg	100
<input checked="" type="checkbox"/>  384569.jpeg	673
<input checked="" type="checkbox"/>  266480-hinged-turtoise-kinixys-belliana.jpeg	9837
<input checked="" type="checkbox"/>  1280px-Kinixys_belliana_nogueyi_1_by_diotime.jpeg	932
	12818

- Sort Results: This sorts the result by its relevance or numerically.

- **Dynamic Ranges:** When “Dynamic Ranges” is selected the administrators will be able to define their own ranges.

String & Multi-value Field Options

- **Default Conjunction:** Sets the Default Conjunction used between terms selected in a Filter Header menu.
- **Number of Results:** Limits the number of values shown initially in the “Filter Terms” section of a Filter Header Menu.



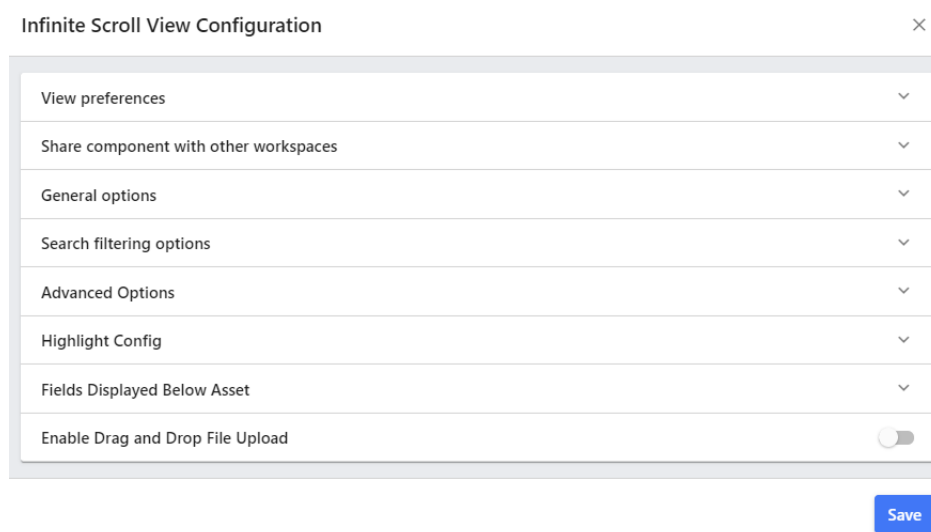
- **Sort Results:** Assets’ sort order is set here, by either Relevance (frequency), Alphabetical and Reverse alphabetical.
- **Max Scroll Height:** This feature is deprecated, and has no effect.
- **Date Field Header Options**
- **Dynamic ranges** (Today, last month, etc.)
- **Display as hierarchy** (not currently functional in Filter Headers)
- **Display as calendar** (not currently functional in Filter Headers)
- **Color for frequency** (not currently functional in Filter Headers)
- **Start Date:** This option allows to choose the starting date.
- **End Date:** This option allows to choose the ending date.
- **Gap:** The gap between the assets’ Date Entered can be selected from the following options:
 - 1 Month
 - 3 Months
 - 1 year

Apply Sort Order

This section of the field properties enables a “default sort order” to be set for the View component. When enabled default sort order for a particular field, select Apply sort order and choose the field from the dropdown Order by list.

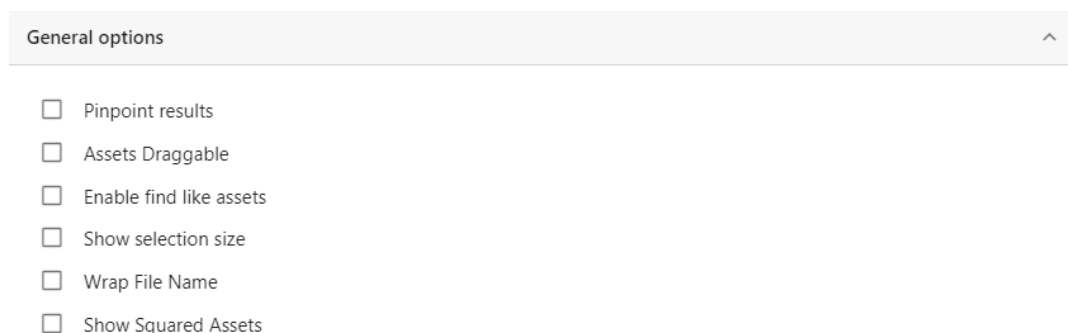
- **Enable:** This toggle enables the sort order off and on.
- **Order By:** This sets the field by which the View component’s assets will be sorted.
- **Sort Ascending:** Sorts the View component’s assets in ascending order by the chosen “Order By” field.
- **Sort Descending:** Sorts the View component’s assets in descending order by the chosen “Order By” field.

Infinite Scroll View Configuration

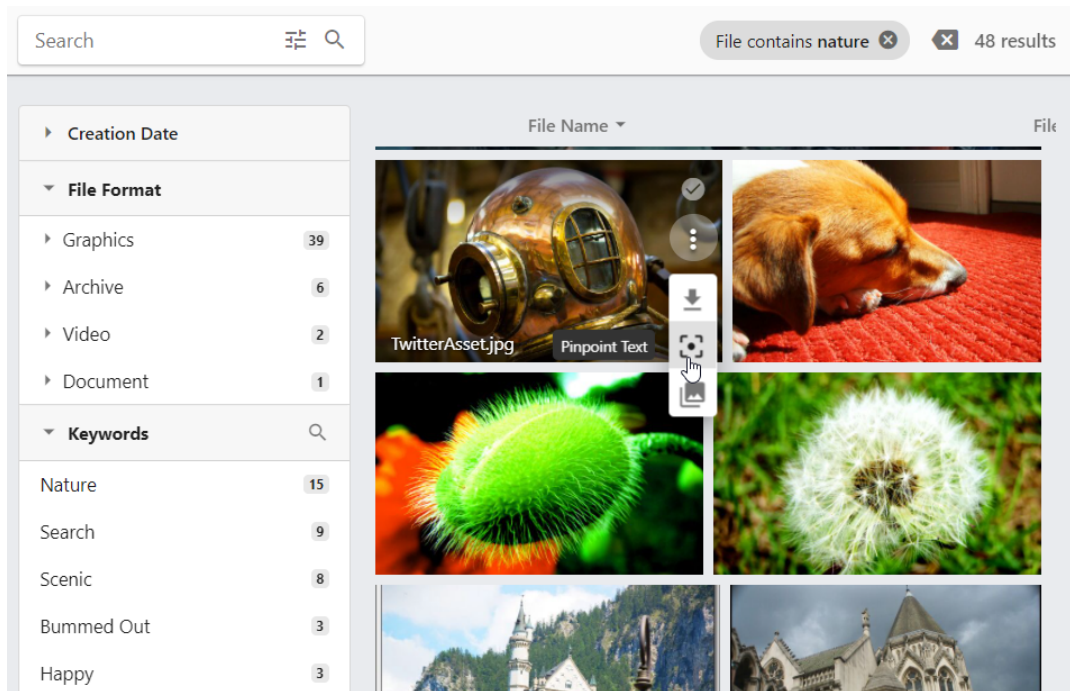


The View Preferences and Share Component tabs are similar across all components. Please refer Component Linking and Component ID and Sharing Components between Workspaces in the [Using Components on Workspaces](#) article for more information.

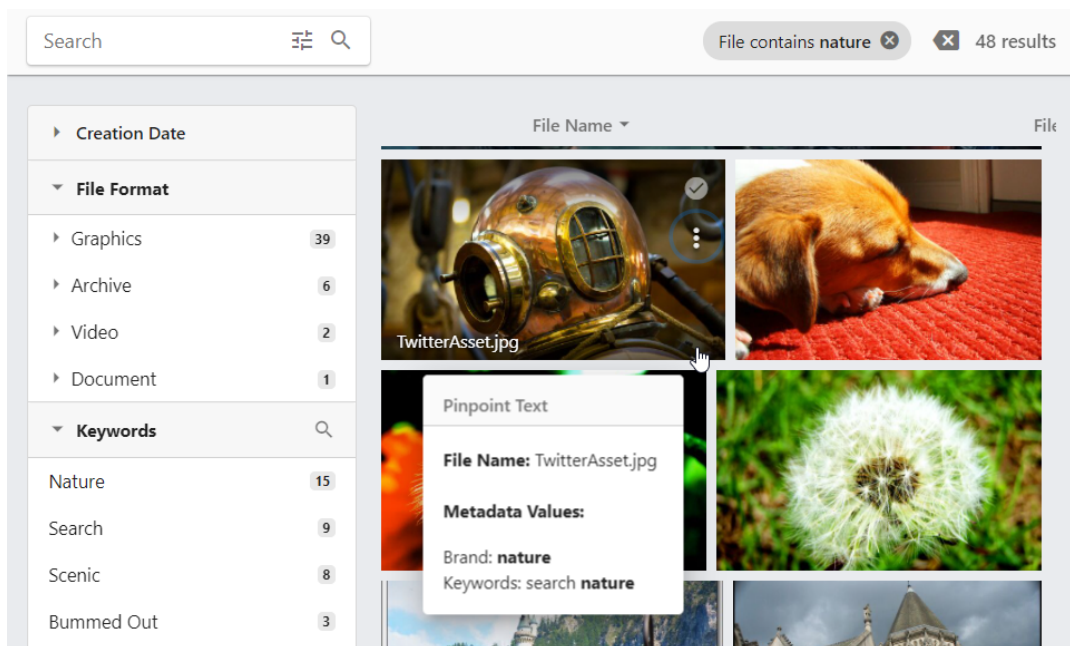
General Options Tab



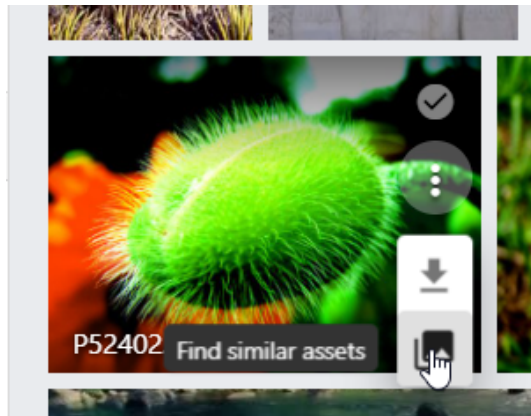
- **Pinpoint results:** When a search is performed, Pinpoint results allows the user to choose the “Pinpoint” command from an asset’s contextual menu.



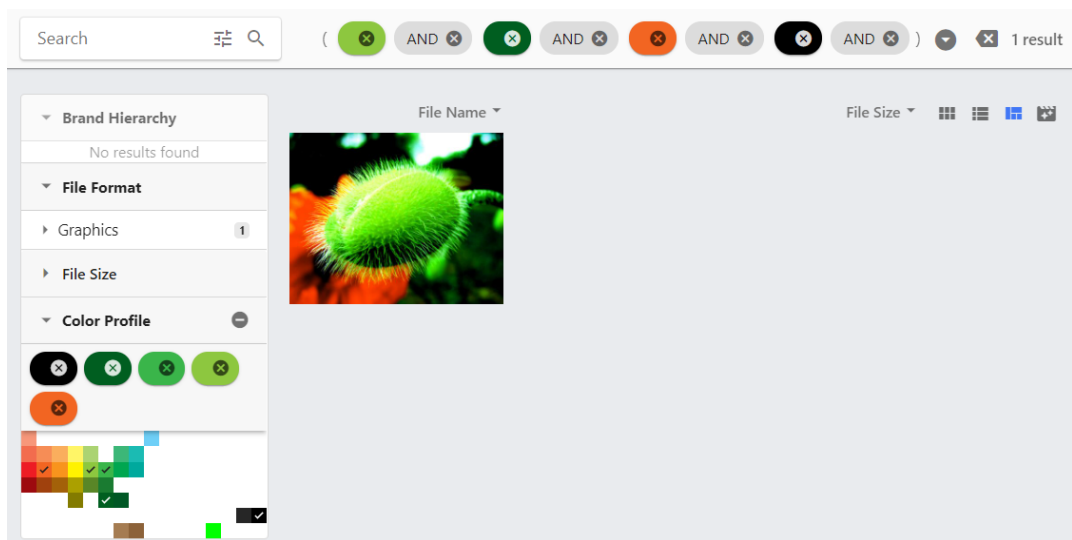
This will display a pop-up dialog which details what metadata matched the search criteria.



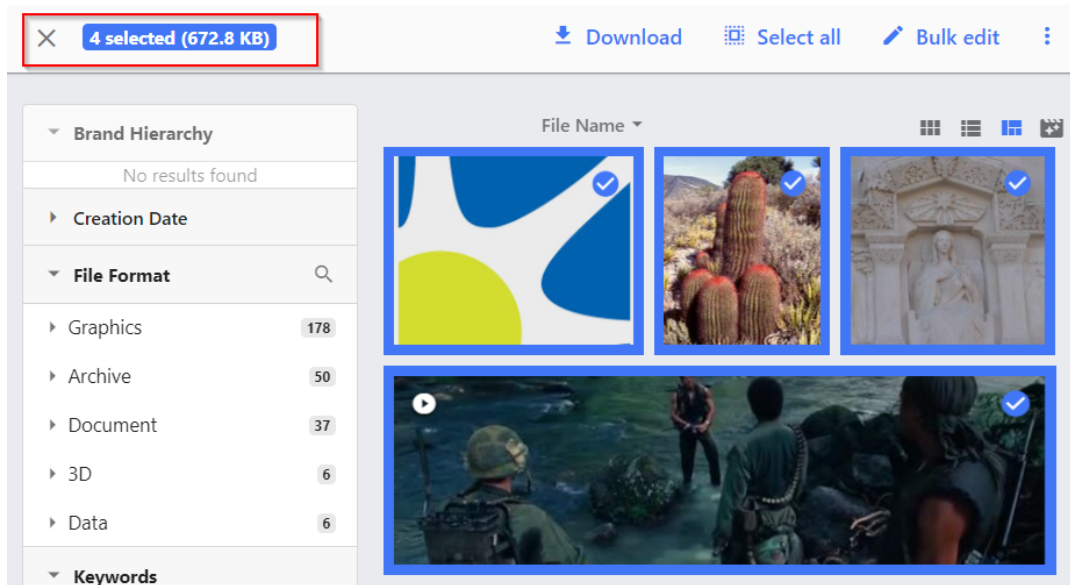
- **Assets Draggable:** This feature allows assets displayed in the View Component to be dragged and dropped onto other parts of the MediaBeacon Web UI to perform a variety of functions to those dragged assets.
- **Enable find like assets:** This feature allows the user to find assets which have similar properties. Selecting this enables the user to choose the "Find similar assets" command from an asset's contextual menu.



When the user clicks the command, the top 5 colors in that asset's color profile histogram become search criteria.

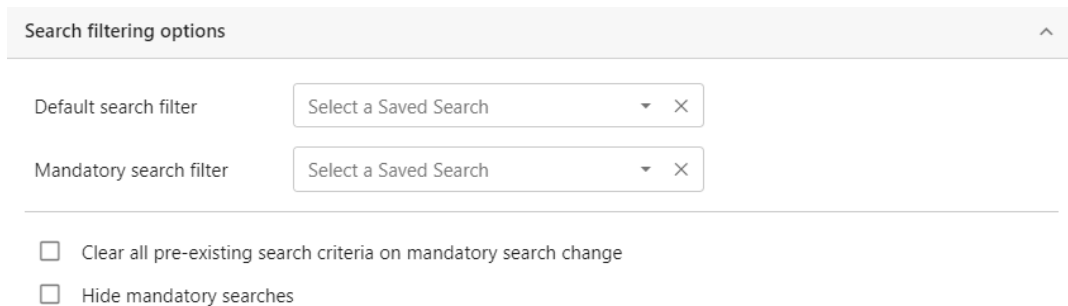


- **Show selection size:** This feature will add the total disk space that the current asset selection represents in the asset count indicator in the Selection Bar.

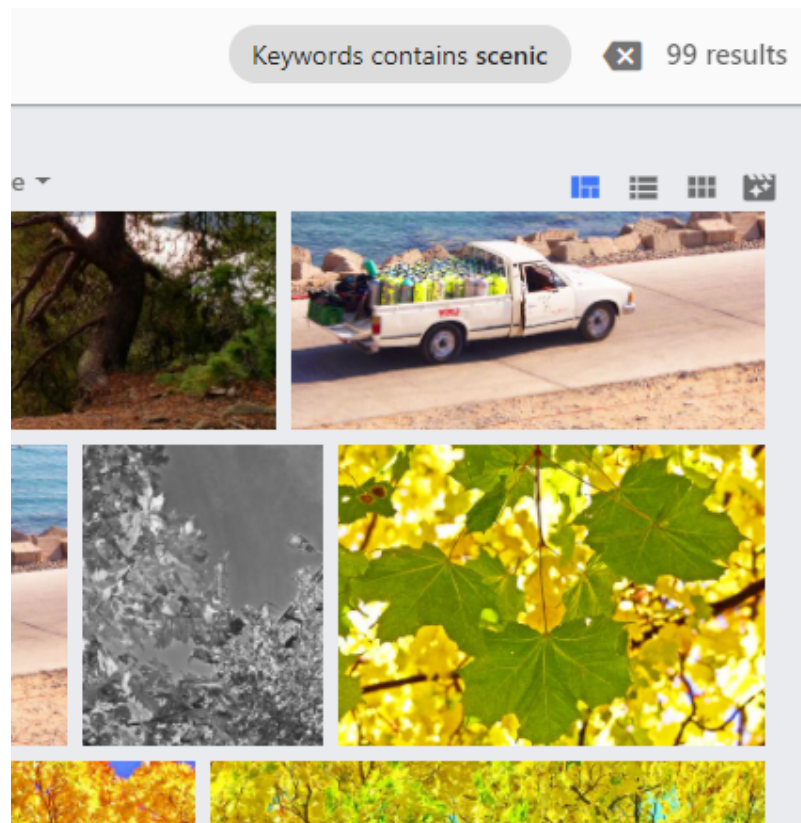


- **Wrap File Name:** This feature wraps long, otherwise truncated file names to multiple lines.
- **Show Squared Assets:** This feature displays the assets in the View Component as cropped to fit in a square tile.

Filter Search Options tab



- **Default Filter Search:** A saved search designated in this place will add search criteria whenever the View component is loaded (either by the workspace containing it is loaded or, it is switched to via the Fast Switcher). Note that this configuration option does not prevent these added search criteria from being cleared.
- **Mandatory Filter Search:** This feature enforces the selected saved search all the time. In this case, the user does not have an option to clear the mandatory search.



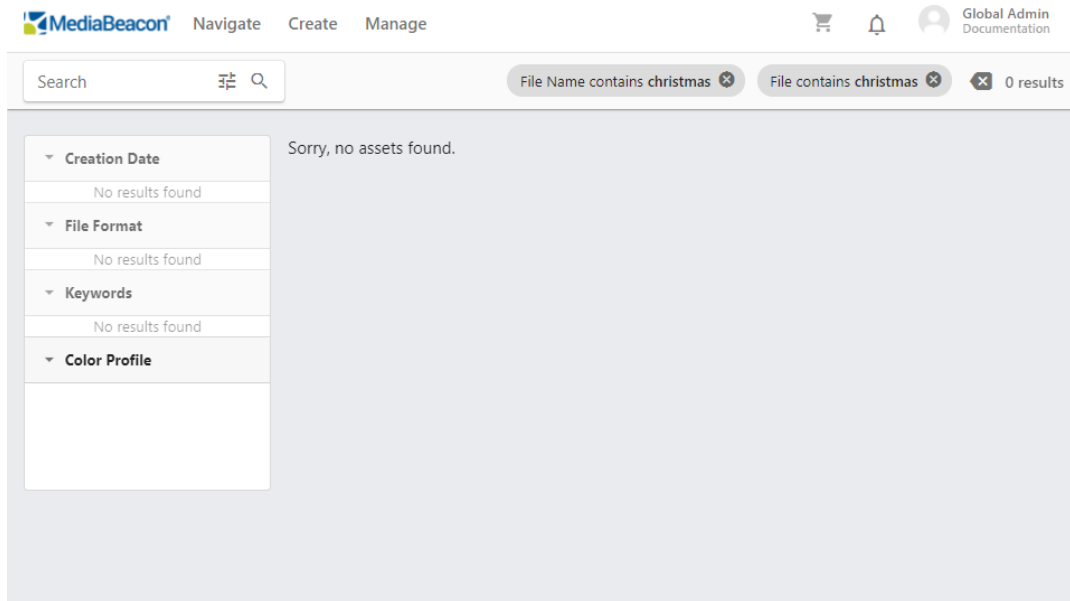
- Clear all pre-existing search criteria on mandatory search change: The default behavior of MediaBeacon is to retain search criteria when the user switches between different workspaces or view components. This option will clear all non-mandatory search criteria when this view component is displayed.
- Hide Mandatory searches: This feature hides the mandatory search criteria from being displayed in the Search Status component, while still applying those criteria.

Advanced Options tab

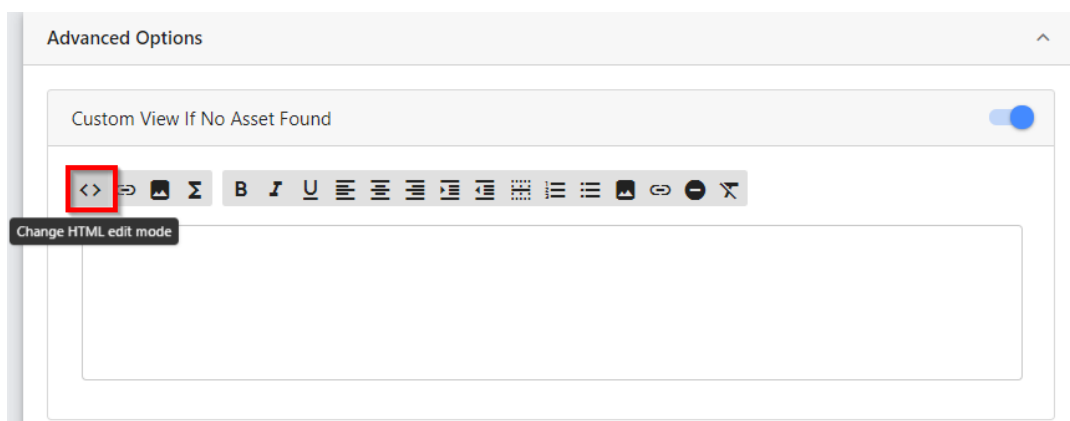
Advanced options provide a way to create custom landing pages for different search conditions.



- **Custom View If No Asset Found:** This feature allows the administrator to add a custom text message when there are no assets found on the workspace.



The message can be added in the form of HTML or WYSIWYG mode using Change HTML edit mode icon.



- **Jump to Workspace if a Search returns no results:** This feature takes the user to a specified workspace if there are no results on the performed search. The administrator can select the workspace from the dropdown list.
- **Run JavaScript on Page Load:** When this feature is enabled, the administrator can configure a JavaScript to execute while the page is loading.

Highlight Config tab

Highlighting of asset previews can be configured using Highlight Config tab. If the metadata matches the desired criteria, a colored notch in the left corner will be displayed in the asset preview. Highlights can also be configured to display a badge with an icon.



To add highlight, click the Add Highlight button.

Enable by Criteria: The administrator can enable highlighting assets by adding criteria. More criteria can be added using Add Highlight button. A criterion can be deleted using the delete icon next to each criterion.



Note: Keywords can be added in terms of hierarchy.

Highlight Config ^

Highlight 🗑️

Enable by Criteria
 Enable by JavaScript

Criteria conjunction AND

Select Field
Select Condition

ADD

Highlight color Transparent

Enable Badge 🔴

Add Highlight

Enable by JavaScript: The administrator can enable highlighting assets by adding a Code search in JavaScript.

Highlight Config
^

Highlight
🗑️

Enable by Criteria
 Enable by JavaScript

```

1  /* Script returns boolean to enable/disable badge. (Modify as appropriate.) */
2  return false;
3
4
5
6
7
8
9
10
11
12
13
14
15
        
```

Highlight color Transparent

Enable Badge

Add Highlight

Highlight Color: The administrator can select a custom highlight color from the dropdown.



Note: Best practice is to select any color other than transparent.

Enable badge: This feature displays a badge in the asset preview.

Enable Badge
🔵

Badge Icon

Ensure that any custom icons look good in both light and dark themes

Badge Title

Enable show badge on hover
 Enable Drag and Drop on Badges

Enable JavaScript Action:

- Badge Icon: This feature allows the administrator to upload a custom badge icon.
- Badge Title: This feature displays an optional label alongside the badge icon.
- Enable the badge on hover: The badge is displayed only when you hover over the asset.

- Enable Drag and Drop on Badges: This feature will trigger a badge's JavaScript when assets are dropped on it.
- Enable JavaScript Action: This feature allows the administrator to enter JavaScript that will be triggered when the badge is clicked. Note: The user should respond to triggered action before any other actions.

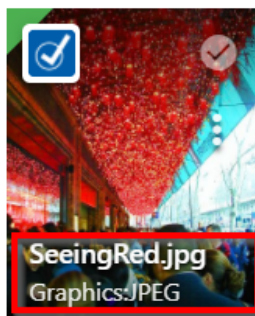
Fields Displayed Below Asset tab

The administrator can add different fields to be displayed on the asset preview from the dropdown list. File name is the default field displayed.

Fields Displayed Below Asset ^

Select a field v

File Name	×
Database	×
File Format	×
MediaBeacon Default	×



Enable Drag and Drop File Upload tab

This feature toggles the user's ability to drag-and-drop files from their desktop to the View component to Upload.

Enable Drag and Drop File Upload

Which directory do you want the files to upload to?

Standard Directory

Current Directory

Which directory do you want the files to upload to? Select Directory Index/

Link to Target Asset

- **Standard Directory:** This feature sends the uploaded files to the standard upload directory.
- **Current Directory:** This feature sends the uploaded files to the current directory.
- **Which directory do you want the files to upload to?** This feature lets the administrator to set a custom directory for drag and drop uploads.
- **Link to Target Asset:** This feature allows the users to automatically link to an asset on upload by dragging their files onto it. Administrators have the option of requiring that users fill out specific form during upload linking, which can differ from required forms during normal drag and drop upload.

Link to Target Asset

Forms Required for Upload Linking:

Select Form
✕
+

Tile View Configuration

Tile View Configuration
✕

View preferences	▼
Share component with other workspaces	▼
General options	▼
Search filtering options	▼
Advanced Options	▼
Highlight Config	▼
Fields Displayed Below Asset	▼
Enable Drag and Drop File Upload	<input type="checkbox"/>

Save

Most of the options for the Tile View component do not differ from similarly named Infinite Scroll View component options. Please refer to that section for more information.

Significant differences to Tile View component options are listed below.

General Options tab

- **Enable View Resize Slider:** The display of the thumbnail resize slider may be toggled here.
- **Default slider value:** This slider sets the default size of asset tiles in the component. Note: If the above option is enabled the user will be able to change asset tile size, but only for that user.

General options ^

- Pinpoint results
- Assets Draggable
- Enable find like assets
- Show selection size
- Wrap File Name
- Show Squared Assets
- Enable view resize slider

Default slider value:

List View Configuration

List View Configuration ×

View preferences	▼
Share component with other workspaces	▼
General options	▼
Search filtering options	▼
Advanced Options	▼
Highlight Config	▼
Enable Drag and Drop File Upload	<input type="checkbox"/>
List View Options	▼



Save

Most of the options for the List View component do not differ from similarly named Infinite Scroll View component options. Please refer to that article for more information.

Significant differences to List View component options are listed below.

Highlight Config Tab

Same as the Infinite Scroll View component, but Highlights on a List View component cannot have badges.

<input checked="" type="checkbox"/>		SeeingRed.jpg	285.22 KB	2021-06-28
<input checked="" type="checkbox"/>		SeeingRed.jpg	285.22 KB	2021-06-28

List View Options Tab

List View Options ^

Enable Import

Enable Export

Enable Bulk Select

Capture current component settings and lock

Is Read Only

Preview Size: Small Medium Large

Number of rows to display

Width

[Save](#)

- **Enable Import:** When this feature is selected, the Import button in the list view is enabled for the users.
- **Enable Export:** This feature enables the Export button for the users.
- **Enable Bulk Edit:** This feature enables the Bulk Edit button for the users.
- **Capture current component settings and block:** When this feature is selected, the current component settings of the ACL is made default.
- **Is Read Only:** When this feature is selected by the administrator, the ability of users to edit the fields in the list view is disabled.
- **Preview Size:** The administrator can select the size of the list preview.
- **Number of rows to display:** This feature allows the administrator to enter the number of rows to be displayed.
- **Width:** The administrator can set the display width of the list view in pixels. If there are many fields in the list component, the View component will add a scroll bar for navigation.

Video Editor View Configuration

Video Editor View Configuration ✕

View preferences	▼
Share component with other workspaces	▼
General options	▼
Search filtering options	▼
Advanced Options	▼
Highlight Config	▼
Fields Displayed Below Asset	▼
Enable Drag and Drop File Upload	<input type="checkbox"/>

[Save](#)

The options here do not differ from the Infinite Scroll View component's options. Please refer to that article for more information.

5.4. Brand Portals

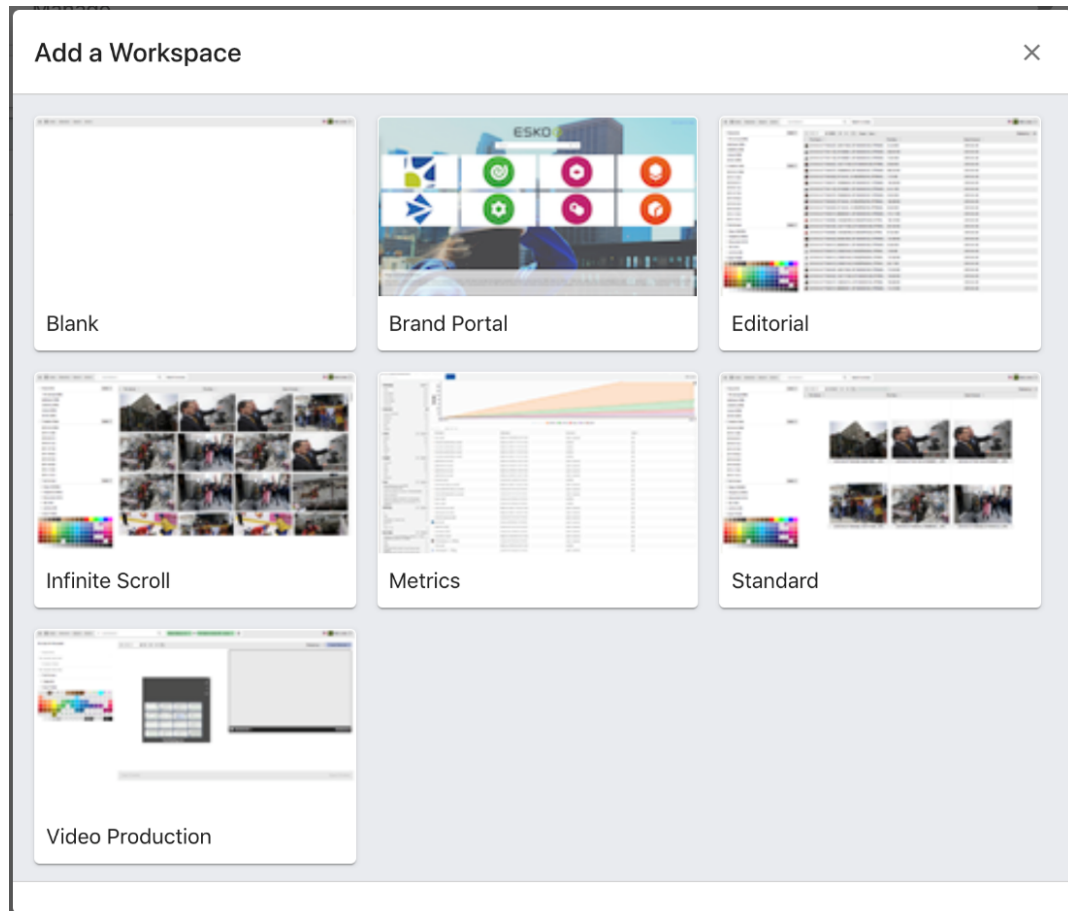
The brand portal feature is a refinement of several existing and new components and functions in MediaBeacon, that, together, present an introductory interface that guides users to content.



The workspace above is configured as a brand portal. This article will cover the specific configuration points used.

5.4.1. Adding a Brand Portal

A generic brand portal may be added to an ACL via the Menubar > Manage > Workspace command, which opens the Manage Workspace page, where the admin can click **Add New Workspace** button and choose the Brand Portal preset.



A new workspace will be added, preloaded with the appropriate components. However, these will need to be configured to fully style the portal. One additional point to note is that all components on this template have their **Hide Component Title** property enabled.

5.4.2. Configuring Brand Portal

Navigate to Manage> Workspace> Workspace Options> Styling Options


Styling options ^


Hide Menu Bar


Hide workspace tabs


Theme Color ?

Menu Bar Background Color ?

Home Button Icon 

Dark Theme Home Button Icon 

Workspace Icon 

Workspace Background Image 

Custom CSS classes:

Browser's Window Title:

Home Destination Workspace: ▼ ×

- **Hide Menu Bar**
 - Typically, the menu bar is hidden from the user on a Brand Portal.
- **Home Button Icon**
 - When a custom Home Button Icon is configured, any Quick Search component that is not in Menu Bar Mode will display that icon to the left of the search field.
- **Workspace Background Image**
 - This “icon” is used as a static background for the workspace. Previously this functionality was achieved using the Featured Content component
- **Home Destination Workspace**
 - This field allows an admin to configure the Home Button (which normally clears search criteria) to redirect the user to a given workspace.
 - This function can be still performed by using the [Client JavaScript](#) method “changeWorkspace” in the Manage Workspace > Workspace Options > Advanced JavaScript Options > “Enable JavaScript on Home Button Click” section. Note that commands entered here will supercede the setting in “Home Destination Workspace.”
 - As a best practice, this configuration would not likely be used on a brand portal workspace itself, but would likely be used on other workspaces to provide an easy way to return to the brand portal workspace.

5.4.3. Brand Portal Component Configuration

This section details the component configuration points used in a Brand Portal.

Logo Component Configuration Points

A new component that uses the Icon Picker to quickly configure a static image for display.

Quick Search Component Configuration Points

- As mentioned above, a custom Home Button Icon is configured, any Quick Search component that is not in Menu Bar Mode will display that icon to the left of the search field.
- When in this state, the menu bar is displayed slightly taller (48px tall), than the base state (40px).

Places Browser Component Configuration Points

- Tile Square Mode (New, Places Browser Configuration > Places Preferences > Display Mode)
 - This place display mode is a re-imagining of places in Button mode that was used with Landing Pages. When used, it reveals a set of options per place that are used specifically in Tile Square mode.
 - Background Image: Uses the icon picker to assign a background image to a place tile.
 - Dark Theme Background Image: The same as above, but uses a unique image when the dark theme is used.
 - Background Color: This setting allows the admin to define the background color of the tile.
 - Text Color: This setting allows the admin to define the text color of the tile.
 - If a place's Tile Square settings are not configured, each place will be displayed in a randomized distinct color from other tile squares.



Note: Dark Theme Background Image icon will be enabled only when the Display mode is set to Tiles in the Places Browser configuration. In other scenarios, only the Background image icon will be displayed.

Featured Content Component Configuration Points

This component allows the admin to define a set of live assets in a paginated display to the user. When the user clicks on any of these assets they may be redirected to another workspace.

- Content Source (Existing): A content source must be defined for the assets shown in featured content either by saved selection or saved search.
- Display Modes (New, Featured Content Configuration > Configuration > Display Mode): In previous versions of MediaBeacon, there was only one display mode available (Landing Page Mode), this is now augmented with two new display modes, which replace the need for and the function of asset Custom Layout.
 - Tile Square: Displays each asset without its name fitting within a square tile (showing the center of the asset).
 - Tile Fit: Displays each asset and its name in a tile element similar to asset presentation in MediaBeacon's Tile view component.
- Number of Rows (Existing): Defines the number of tiles shown vertically within the featured content component.
- Destination Workspace (Existing): Defines the destination workspace used when a user clicks on an asset within the Featured Content component.

HTML Component Configuration Points

- Background Mode (New, HTML Configuration > Configuration > Background Mode)
 - This option, when enabled will tint the background of an HTML component with a 50% white fill. This provides a simple method of making text in the component contrast to the background.
 - As a best practice suggestion, if the Advanced HTML Composition mode is in use, "Display Contents in an Iframe" option should be disabled when the HTML component is being used to show simple text.

6. Add-on Functionality Configuration

In this section you can read how to configure Add-on Functionalities in MediaBeacon.

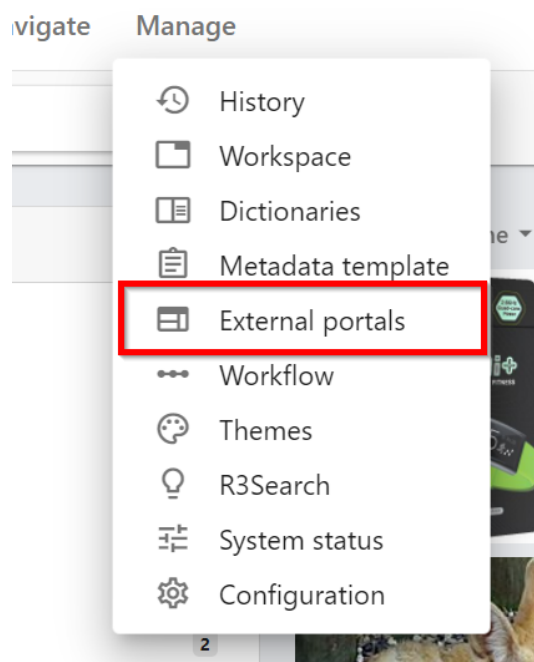
6.1. External Portals

This feature allows Global Administrators (or properly privileged General Users) to create a styled portal that allows visual access to assets for non-users of MediaBeacon. The portal contains a selection of assets that may be searched and downloaded (if the portal settings allow).



Attention: The External Portals function requires additional setup of an AWS S3 bucket to operate.

The `Menu` > Manage > External Portals command



- the Manage External Portals dialog

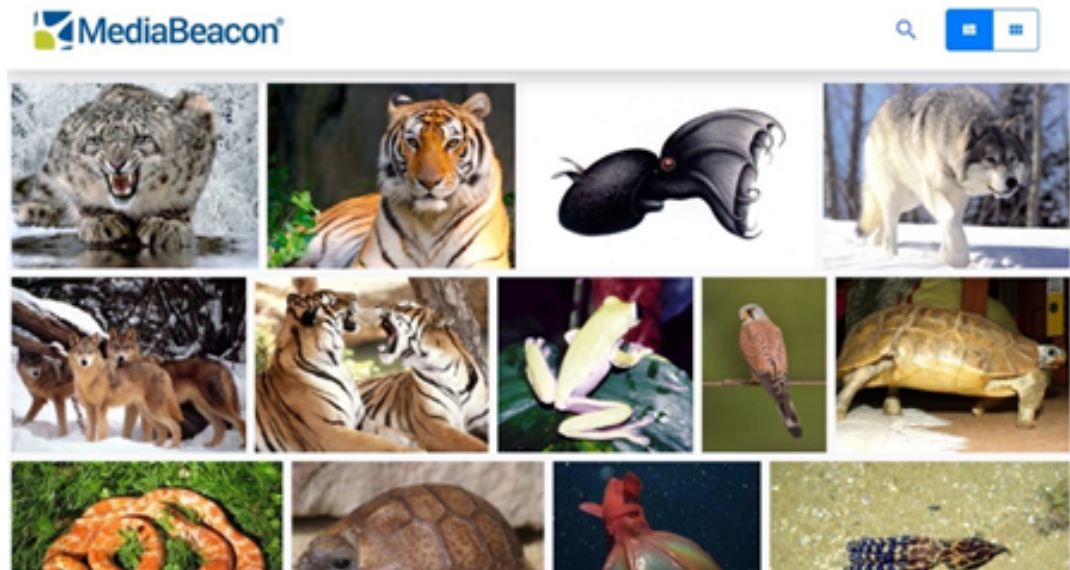
← External Portals

Filter

Name	Creator	Expiration Date	Creation Date	Description	
test	ryanroot	2020-11-15	2020-11-08		
rrtest	root	2020-11-15	2020-11-08		
MediaBeacon Zoo	justinroot	2020-11-15	2020-11-08	So many Critter!	
4 Animals	exampleuser	2020-11-17	2020-11-10		

1 of 1 | 1 - 4 of 4

- the#Portal UI itself



Attention:

- **ACL Permission Restriction:** This feature is enabled by default for all users of an#ACL but#may hidden by using the “External Brand Portal” permission restriction

External Portal Default Graphics

The default Logo, Banner and Favicon of new portals may be set using the following system properties. The Images that are used are not resident in MediaBeacon as assets, but at a given location on the host server. Note: This location is arbitrary and is specified the system property.

The following system properties set the default images for new portals.

mb.external_portal.logo.path=C:\\Users\\Administrator\\ExternalPortalDefaults\\logo.png

mb.external_portal.banner.path=C:\\Users\\Administrator\\ExternalPortalDefaults\\banner.png

mb.external_portal.favicon.path=C:\\Users\\Administrator\\ExternalPortalDefaults\\favicon.ico

The following system properties prevent users from changing the images for new portals.

`mb.external_portal.logo.locked=true`

`mb.external_portal.banner.locked=true`

`mb.external_portal.favicon.locked=true`



Note: These properties and files must be used on the webhead server as well (in the catalina.properties file).

MediaBeacon 22.07 offers new System Properties for the configuration of home icons in an External Portal.

If these properties are enabled by the administrators,

`mb.external_portal.favicon.path=C:\\Users\\Administrator\\Desktop\\logo.png`

`mb.external_portal.logo.path=C:\\Users\\Administrator\\Desktop\\logo.png`

`mb.external_portal.banner.path=C:\\Users\\Administrator\\Desktop\\banner.jpg`

the external portals created will have the logos as per the mentioned path.

When an image in the path is renamed as **logo_<group name>.png**, the logo will be applicable only for the specific group. This enables the user to

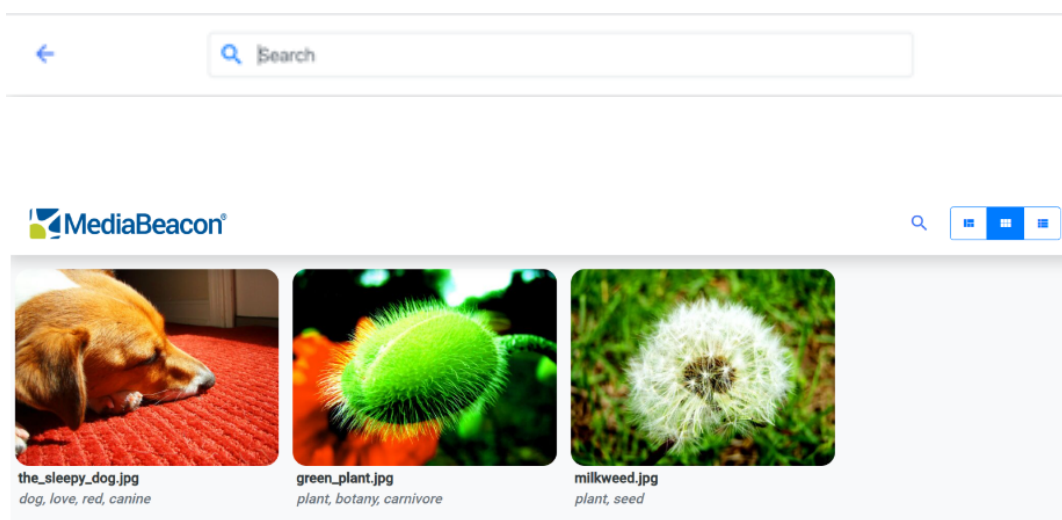
- Choose a certain image for the Group's External Portals.
- Various groups can have their own default logos for the External Portals.

6.1.1. Using an External Portal

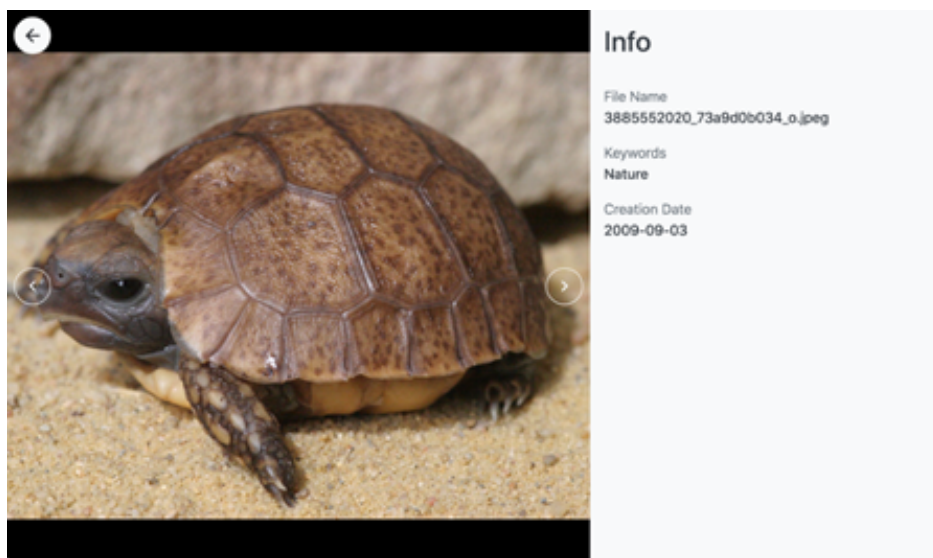
- **Portal#Quick#Search:** Clicking the Magnifying Glass icon will switch the title bar to a search field. This function is analogous to QuickSearch in MediaBeacon. It will search available metadata fields and file names for the entered string. Search may be cancelled by clicking the "Back" arrow button.



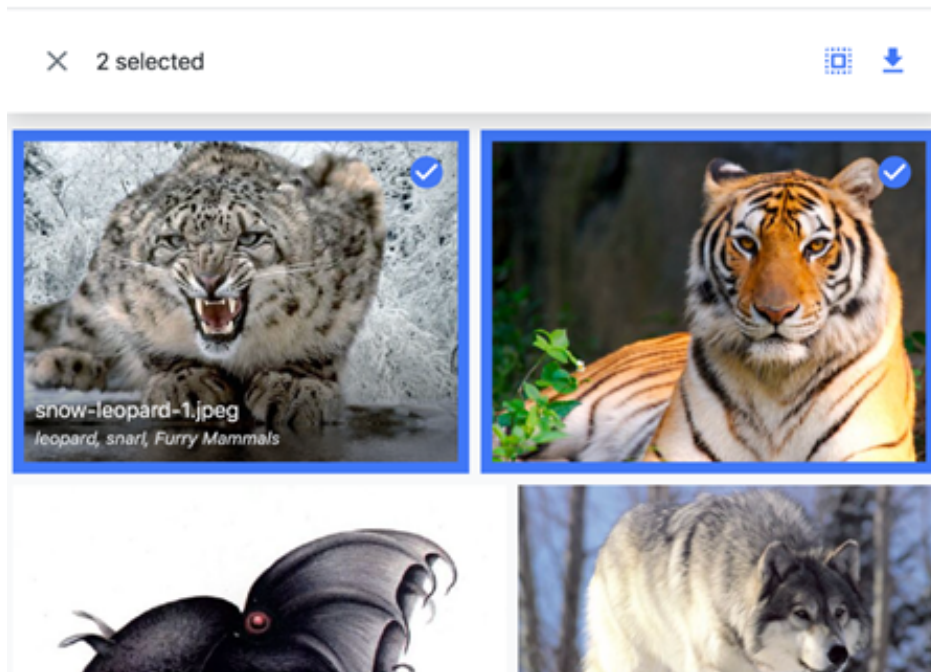
Note: External portal quick search is case sensitive.



- **Portal Infinite Scroll View:** This view is the default for the portal and may be chosen with the second to the rightmost button in the title bar.
- **Portal Tile View:** This view allows the user to see the filename and included metadata for each asset. This view may be chosen with the rightmost button in the title bar.
- **Portal List View:** This view allows the user to see the filename and metadata included for each asset as a list. This view may be chosen with the rightmost button in the title bar.
- **Portal Asset View:** Similar to MediaBeacon's Asset View, clicking on an asset will show a higher res preview of the asset (if possible) and available metadata. Paging between assets is also possible with the left and right icons that hover on the edges of the preview.



- **Downloading Assets:** Assets must be selected via the selection icon in each asset's upper right corner before downloading. Once an asset is selected, the title bar will show the Clear Selection button (X icon), the Selection Count, the Select All button, and the Download Selection icon.



Portal Asset View

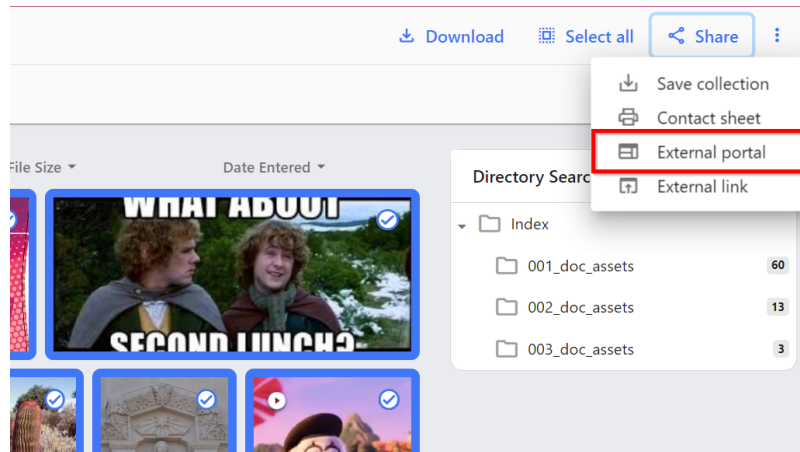
The users can open single asset view in the external portal and can paginate through the assets using the arrow keys.



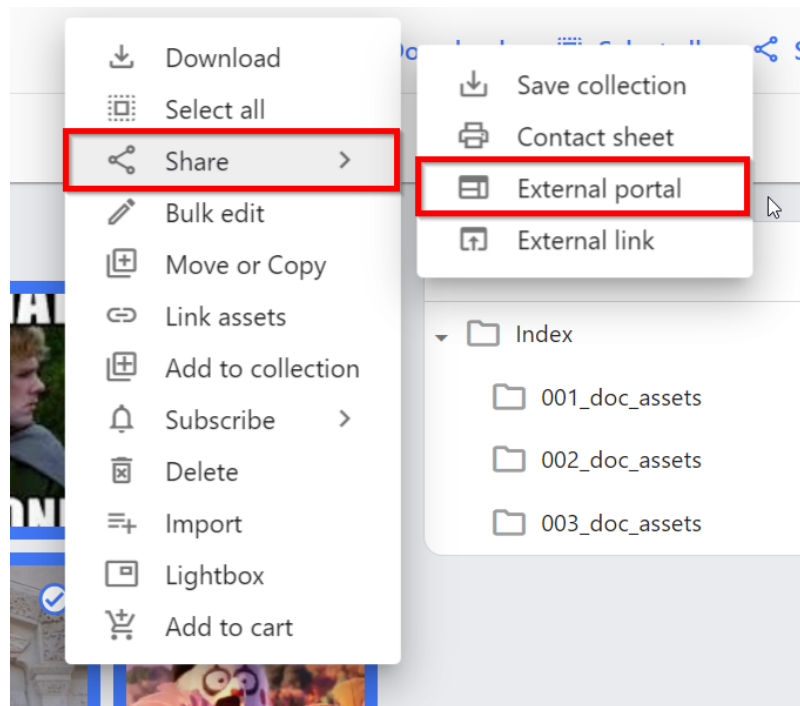
6.1.2. Creating an External Portal

To create an External Portal, select one or more assets in a View component

1. Selection bar > Share > External Portals



2. Asset's contextual menu > Share > External Portal



which displays the #Create#External#Portal#Dialog.

External portal
✕

Create Portal

Republish Portal

3 asset(s) in the current selection

Name

My External Portal

Description

Expiration Date

2022-06-28

Allow Downloads

Terms and Conditions
▼

Access Restriction
▼

Static Images
▼

Fields To Display
▼

Sharing
▼

Create Portal

- **Create Portal:** This radio button is displayed (and auto selected) when an asset selection is extant when this dialog is opened. It allows new portals to be created.
- **Republish Portal:** Expired portals may be republished when this button is chosen. The user may modify all parameters of the portal except the included assets (Asset List).
- **Asset List:** Displays the assets that will be used in the portal, derived from the selection of assets at the time the dialog was opened.
- **Name:** The name for the portal. This will be displayed as its tab name in the browser.
- **Description:** A description of the portal, not shown to the user.
- **Expiration Date:** Automatically set to a week from the current date, this is the date the portal will automatically be unpublished and unavailable. Once a portal has expired it will be automatically deleted.
- **Allow Downloads:** Allows users of the portal to download the assets in the portal. The original files are downloaded

When an External Portal is created, creator gets notification.

A given General User will be able to see those view portal entries in the Manage Portals dialog (Manage > External Portals) that they created, or created by users in ACLs that the given user is also a member. Global Administrator users are still able to see all External Portal entries in this interface.



Attention: An External Portal can contain a maximum of 1000 assets

Asset Retention Policy

In External Portals, whenever a user downloads an asset, the cache of downloaded files is stored. The default value set is 50GB (previously it was 24 hours). User can download again using this cache instead of pulling files from the core file system. If the size of downloads causes the total cache size to be greater than the set value, the older files will be automatically removed until the cache size is back under the set value.

Terms and Conditions

Terms and Conditions ^

Terms and conditions to display before usage of portal

Text entered here will be displayed to a user within a dialog, prompting for agreement prior to allowing access to the portal ▲ ▼

Allows the user to add customized terms and conditions for the External Portal.

Whenever the External Portal is opened, a **Portal Terms and Conditions** box is displayed if Terms and Conditions are specified by the creator. Users can view the assets when they agree to this by selecting **Agree to Terms**.

Access Restriction

Allows the user to add a password to the External Portal.

Access Restriction ^

Access password

Verify access password

Whenever an External Portal is accessed, the user needs to enter the password if an access password is specified by the creator. This feature limits the people who can access the portal.

To add a password to the External Portal, enter the password in the Access password field and confirm the password by entering the password again in the Verify access password field.

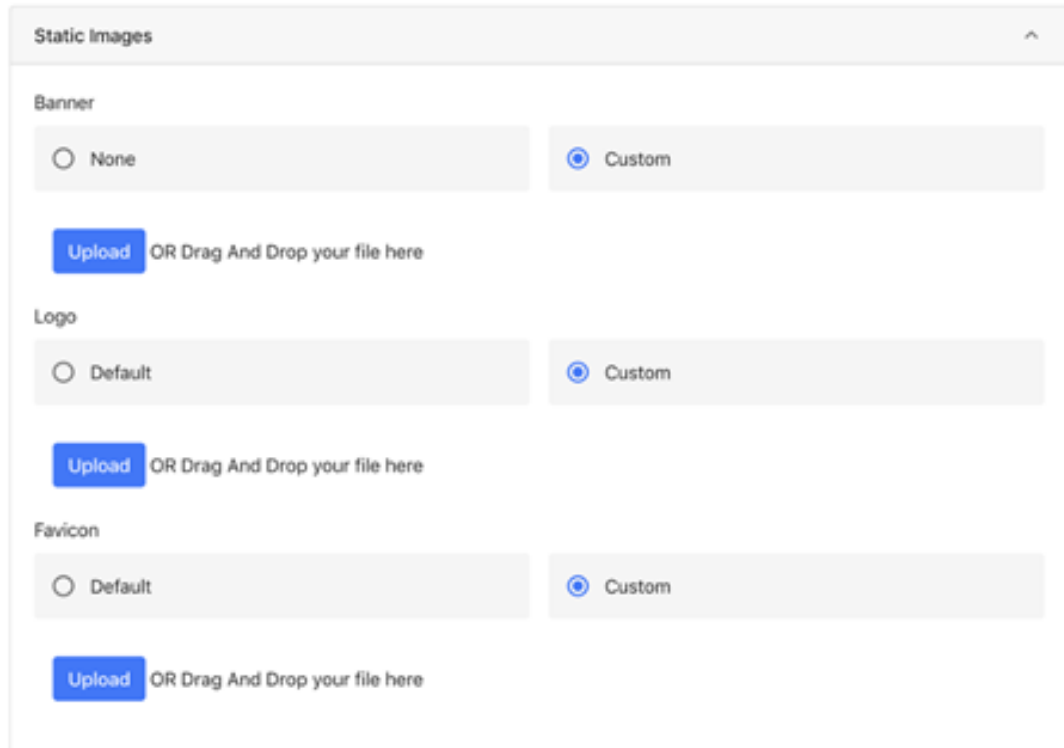
Please enter access password

Enter Access Password

Access Portal

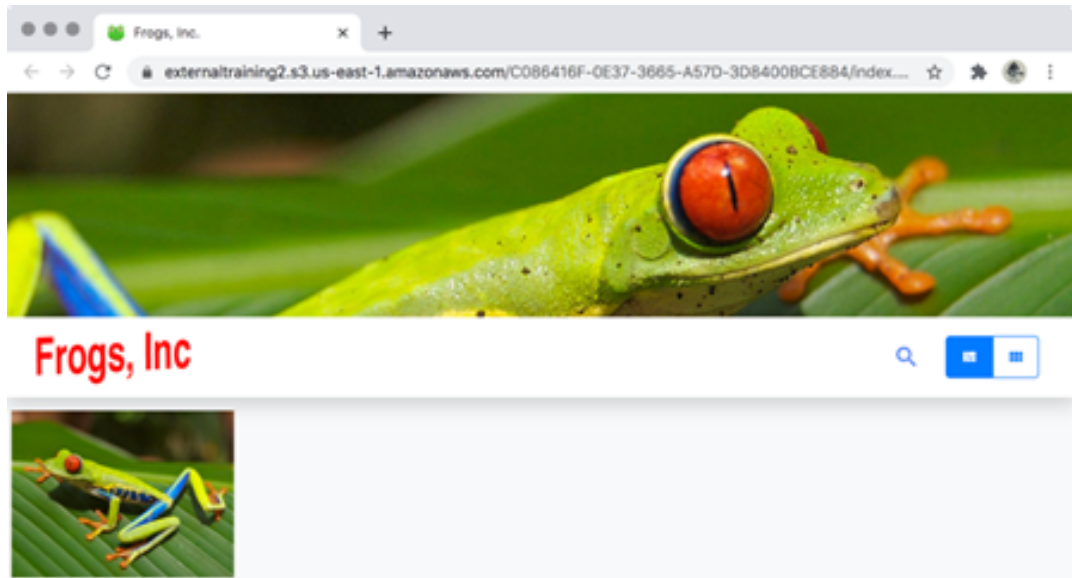
6.1.3. Customization Options

- **Static Images**



The screenshot shows a configuration window titled "Static Images". It is divided into three sections: "Banner", "Logo", and "Favicon". Each section has two radio button options: "None" or "Default" and "Custom". In all three sections, the "Custom" option is selected. Below each set of radio buttons is a blue "Upload" button followed by the text "OR Drag And Drop your file here".

- **Banner:** None / Custom: This image will appear above the Portal's Action bar.
- **Logo:** Default (MediaBeacon) / Custom: Replaces theMediaBeacon Logo with one of the user's choice.
- **Favicon:** Default / Custom



- **Fields to Display:** One or more fields may be chosen to display in the portal's Tile and Asset views. Note that the list of fields available here are those available to the ACL in which the Portal is created.
- **Sharing:** Allows an email to be sent, showing a To field, where the user can enter an e-mail address or name, or can choose the recipient from the list.

Sharing ^

To

Cancel
Create Portal

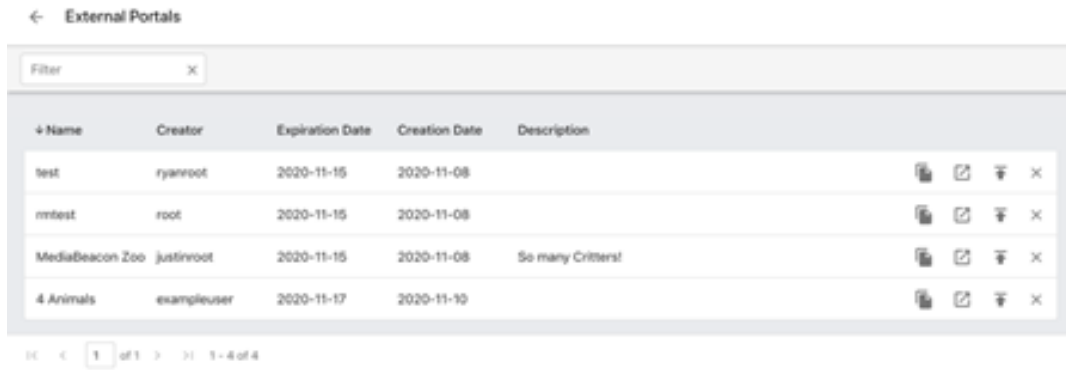
The e-mail recipient will get a default e-mail with

- Email subject: "A selection of assets have been shared with you by [\$user]".
- External Portal name
- External Portal description
- Number and the total size of assets in the External Portal.
- External Portal Expiration Date
- Access Portal button

External Portal Default Sharing E-mail

Unlike previous versions, in the Sharing section of the External Portal dialog, the users can choose a name from the existing users or e-mail address to which the link "Access Portal" will be sent.

6.1.4. Managing External Portal



← External Portals

Filter X

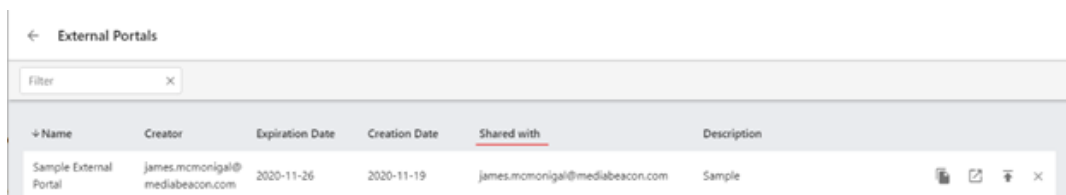
Name	Creator	Expiration Date	Creation Date	Description	
test	ryanroot	2020-11-15	2020-11-08		📄 📄 📄 ✕
rmtest	root	2020-11-15	2020-11-08		📄 📄 📄 ✕
MediaBeacon Zoo	justinroot	2020-11-15	2020-11-08	So many Critters!	📄 📄 📄 ✕
4 Animals	exampleuser	2020-11-17	2020-11-10		📄 📄 📄 ✕

1 of 1 | 1-4 of 4

The Manage Portals dialog is opened when a user chooses #MenuBar# > Manage > External Portals. In this dialog, each row represents a live, accessible portal

- **Name:** #Portal's name
- **Creator:** The user who created the portal
- **Expiration Date:** The date the portal will automatically become unavailable
- **Creation Date:** The date the portal became available, during this current publication
- **Description:** #Description of the portal
- **Copy URL button:** Copies the #portal's URL# to the user's clipboard
- **Open URL Button:** Opens the portal in a new browser window/tab
- **Republish Portal#button:** #Allows the portal's details to be updated, including expiration date# and other details. See the Reusing Portals.
- Unlike previous versions, external portal can be sorted according to its name, creator, creation date and expiring date

External portals now track who they were shared with based on the email addresses on portal creation.



← External Portals

Filter X

Name	Creator	Expiration Date	Creation Date	Shared with	Description	
Sample External Portal	james.mcmonigal@mediabeacon.com	2020-11-26	2020-11-19	james.mcmonigal@mediabeacon.com	Sample	📄 📄 📄 ✕

Republishing Portal

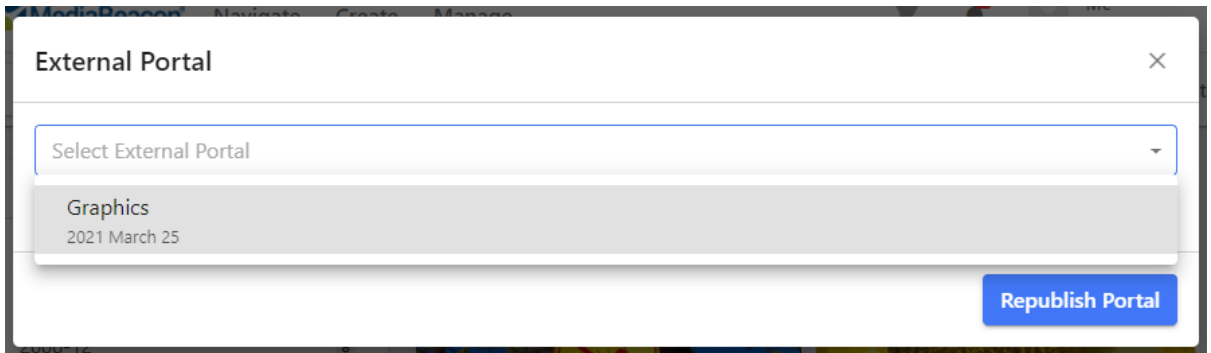
Portals may be “republished” to assist with two use cases:

- Recycling an expired portal
- Editing the properties of an existing portal

The user can replace or update the set of assets used in a preexisting or expired external portal. There are two ways to republish a portal:

Create Portal dialog

1. Open the External Portal dialog via Menubar > Create > External Portal.
2. Choose "Republish Portal".
3. In the Select External Portal field, choose a portal to republish.



4. The dialog is now in the republishing mode.

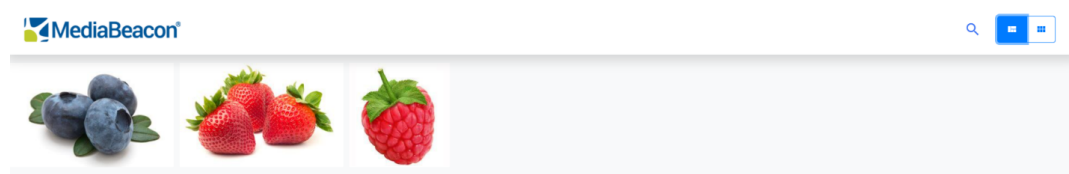
Manage Menu

Open the Manage External Portal dialog via Menubar > Manage > External Portal

To republish a portal, the user can select Menubar > Manage > External Portals and then choose the Republish Portal Icon.

1. **Original Assets:** Uses the already existing assets in the portal.
2. **Current Selection:** Uses the currently selected assets in the portal.
3. **Original Assets and Current Selection:** The assets from the Original and Current selection are used.

For example, the below external portal contains these images:



- Select additional assets from the workspace which needs to be added along with the current assets.
- Click Republish Portal > select the option Original and Current Selection.

External Portal
×

Create Portal

Republish Portal

Graphics.inc

Original Assets

Current selection

Original and Current Selection

2 asset(s) in the current selection:

Name

Graphics.inc

Description

Expiration Date

2021-03-14

Allow Downloads

Static Images
▼

Fields To Display
▼

Sharing
▼

Republish Portal

- Click Republish Portal.

The user can see all the assets in the republished portal.

🔍
🗨️
☰

6.1.5. Reusing Portal

A portal's publishing status may be extended by "republishing" the portal before the expiration date. This may be done:

- In the Manage Portals dialog, with the Republish Portal button,
- OR
- Opening the Create Portal dialog without an asset selection being made,

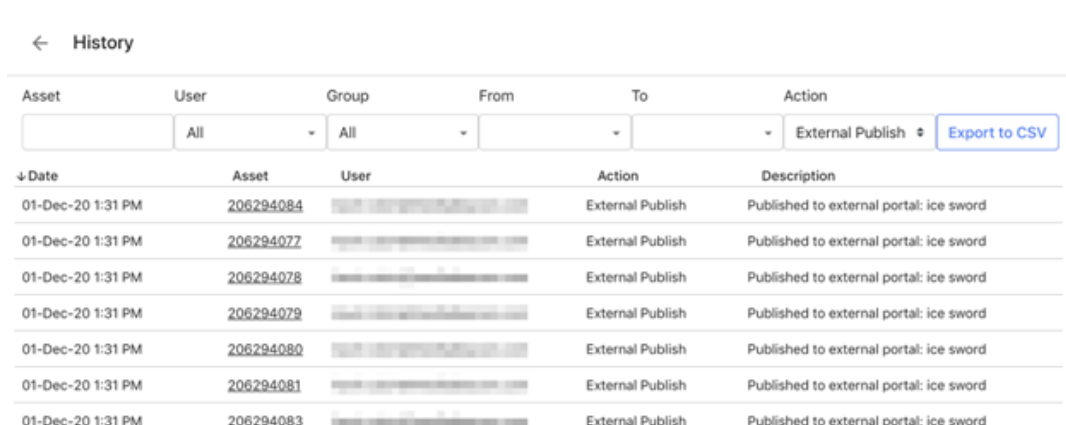
OR

- Choosing “Republish Portal” in the Create Portal dialog.

6.1.6. External Portal History

History of the actions taken in External Portals is now recorded in MediaBeacon History (Manage > History). The actions recorded are:

The “External Portal” History item has been added. This records when an asset is published via an External Portal, or when assets are in a republished External Portal.



The screenshot shows a 'History' page with a table of actions. The table has columns for Asset, User, Group, From, To, and Action. A filter is set to 'External Publish' with an 'Export to CSV' button. The table lists several 'External Publish' actions for asset ID 206294084, all occurring on 01-Dec-20 at 1:31 PM, with a description of 'Published to external portal: ice sword'.

Asset	User	Group	From	To	Action	
	All	All			External Publish Export to CSV	
↓ Date	Asset	User			Action	Description
01-Dec-20 1:31 PM	206294084				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294077				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294078				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294079				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294080				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294081				External Publish	Published to external portal: ice sword
01-Dec-20 1:31 PM	206294083				External Publish	Published to external portal: ice sword

6.1.7. Renditions in External Portal

In MediaBeacon 23.11, users can download the existing renditions of the original assets in the External Portal.

While creating or republishing the External Portal, users are provided with an option **Allow Conversion Downloads** in the External Portal web UI. This allows MediaBeacon users to share External users a link to download existing renditions of the original assets.

Licensing

This is a licensed feature. A Publish Rendition license is required to have this feature in the External Portal dialog.

When you hover over the info icon next to the checkbox the following message will be displayed **Only existing renditions can be downloaded.**

If the user does not have a valid rendition license, the checkbox is disabled and is greyed out by default.

The info icon displays the following when you hover, **Publish Rendition license is not available.**

6.2. MediaBeaconConnectors

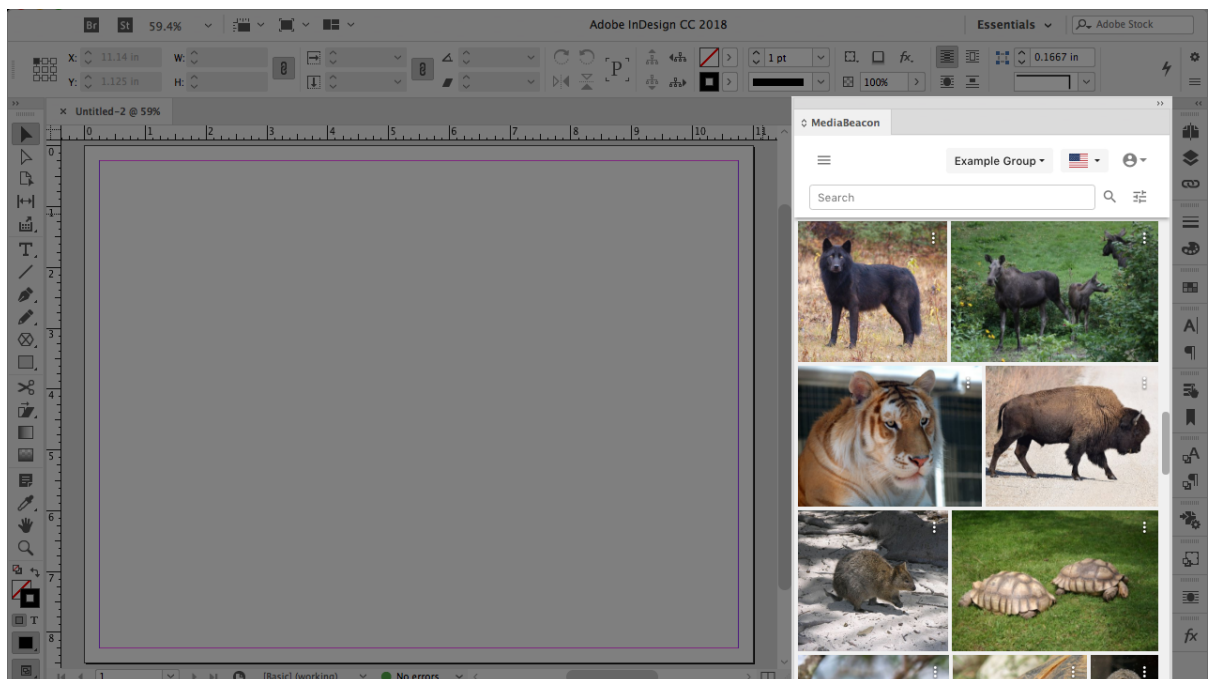
Learn how MediaBeacon Connectors extend the capability of content creation software.

6.2.1. 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 enables MediaBeacon 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 into MediaBeacon.
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>/<timestamp>/links/
```

Terminology

For clarification, several terms used in this article will be defined here:

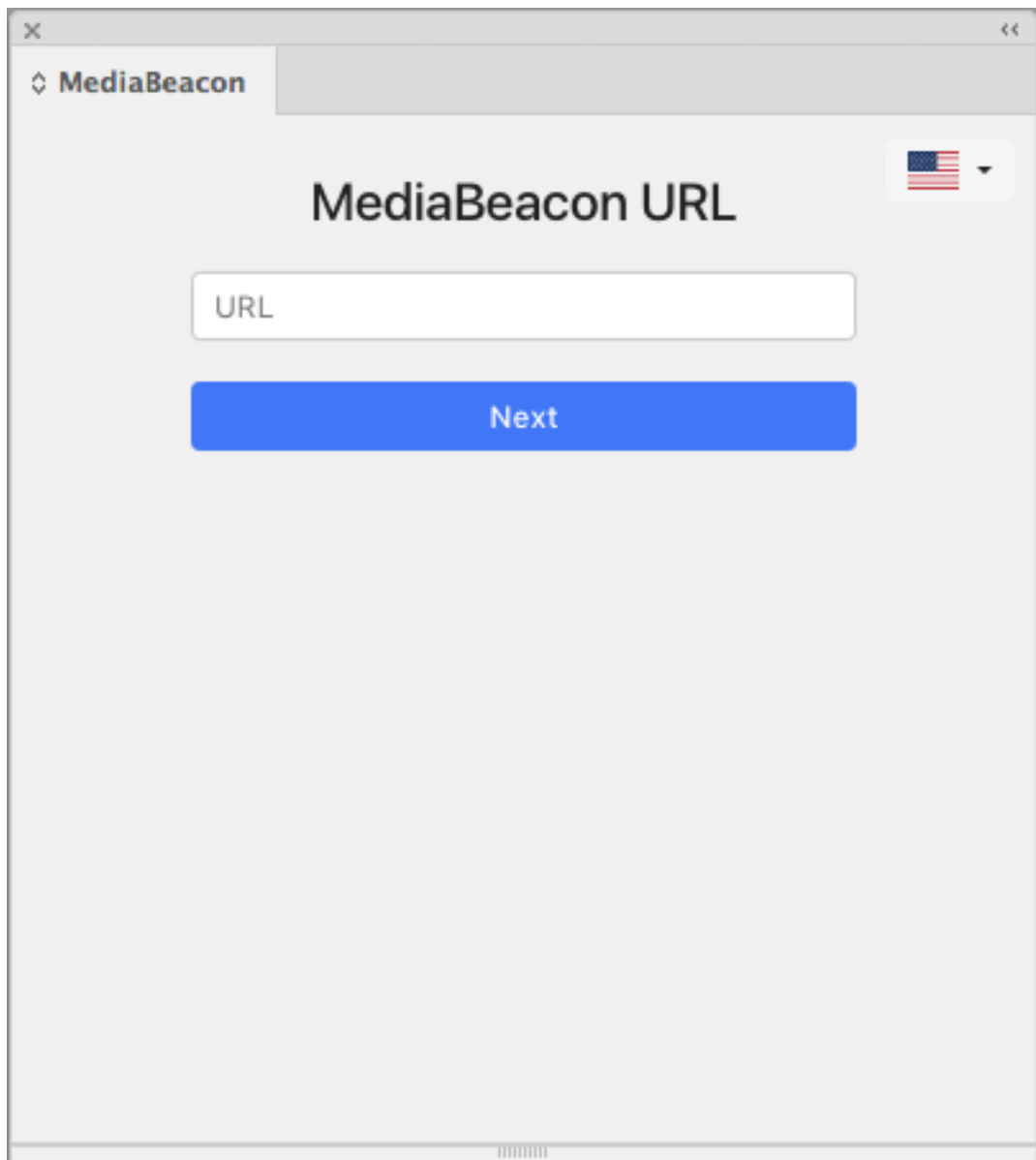
- **Assets:** Files stored in MediaBeacon.
- **Layout document:** A generic term for either an InDesign® or Illustrator® document, especially one that contains placed images.
- **Placed images:** Often referred to as "links", these are files that are referenced or "placed" in a layout document. The full 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

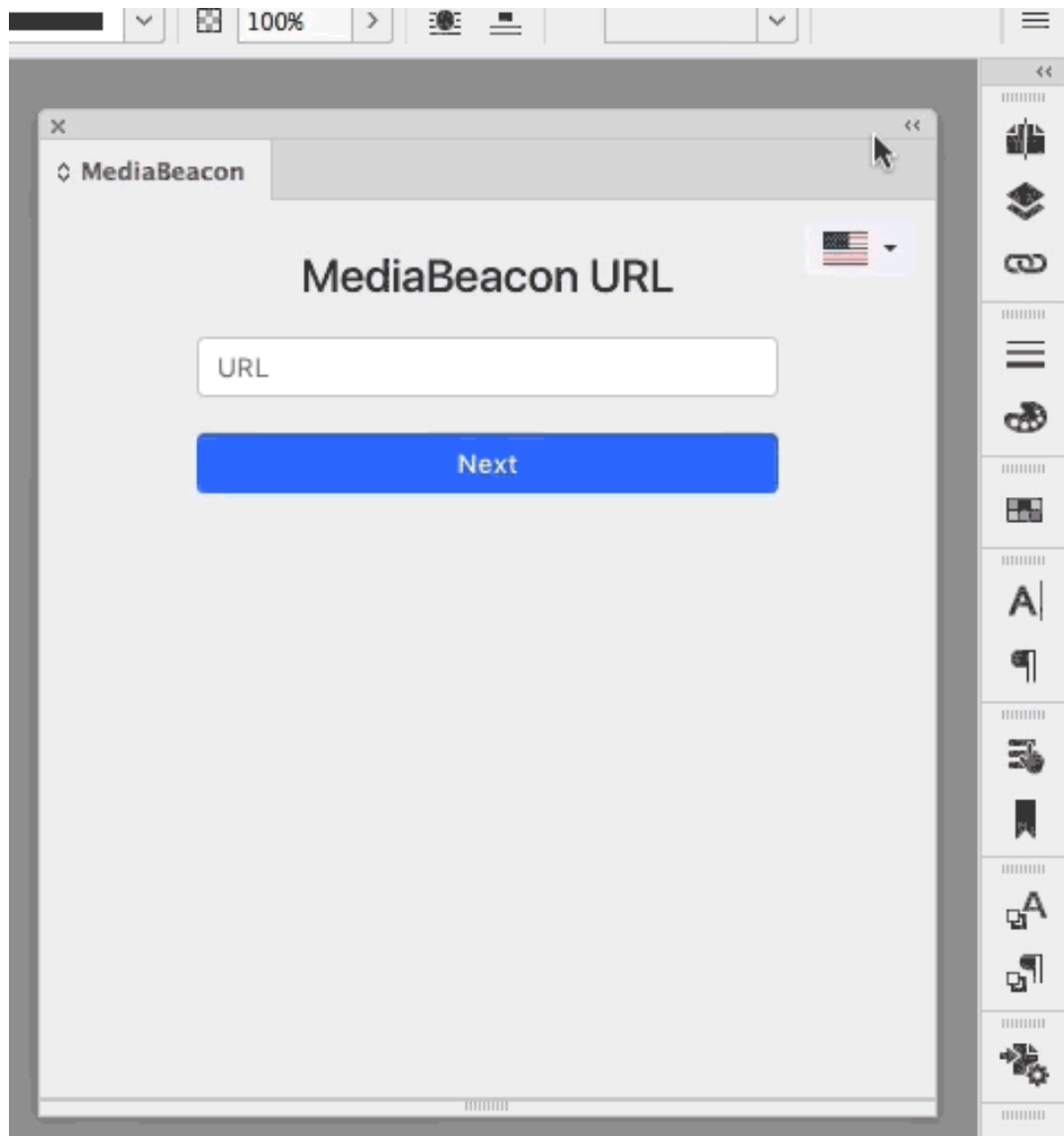
Managing the Connector Panel

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.

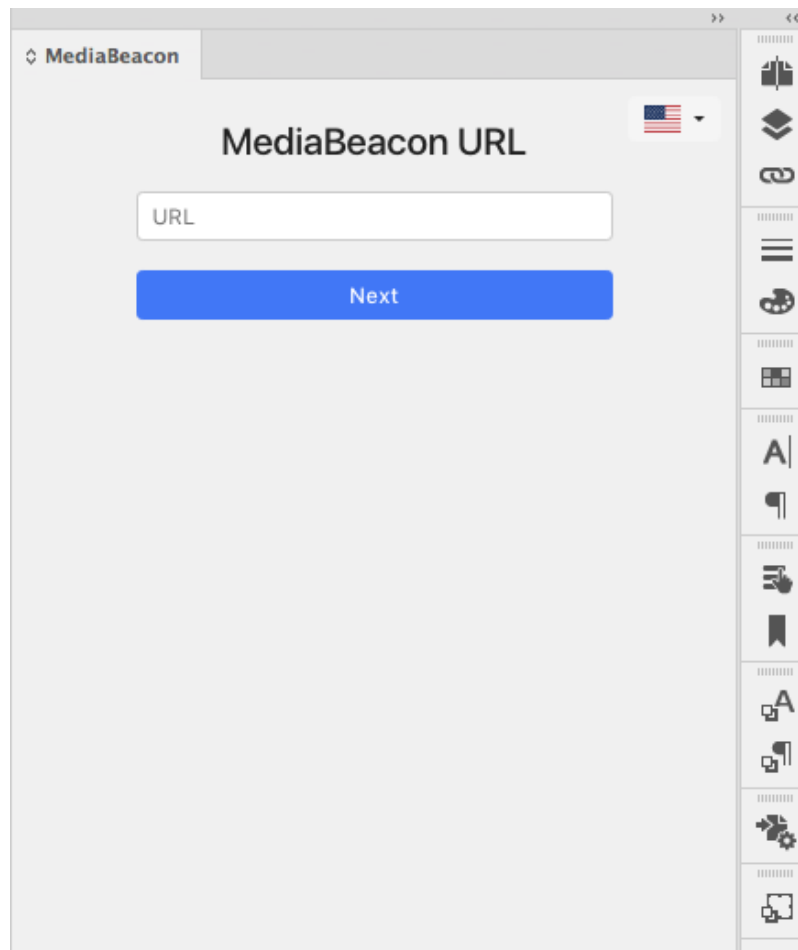


Note: Because the Adobe® workspace UI is very flexible, the panel may be docked anywhere any other panel may be, see the "Manage windows and panels" section of the given Adobe® application's User Guide.

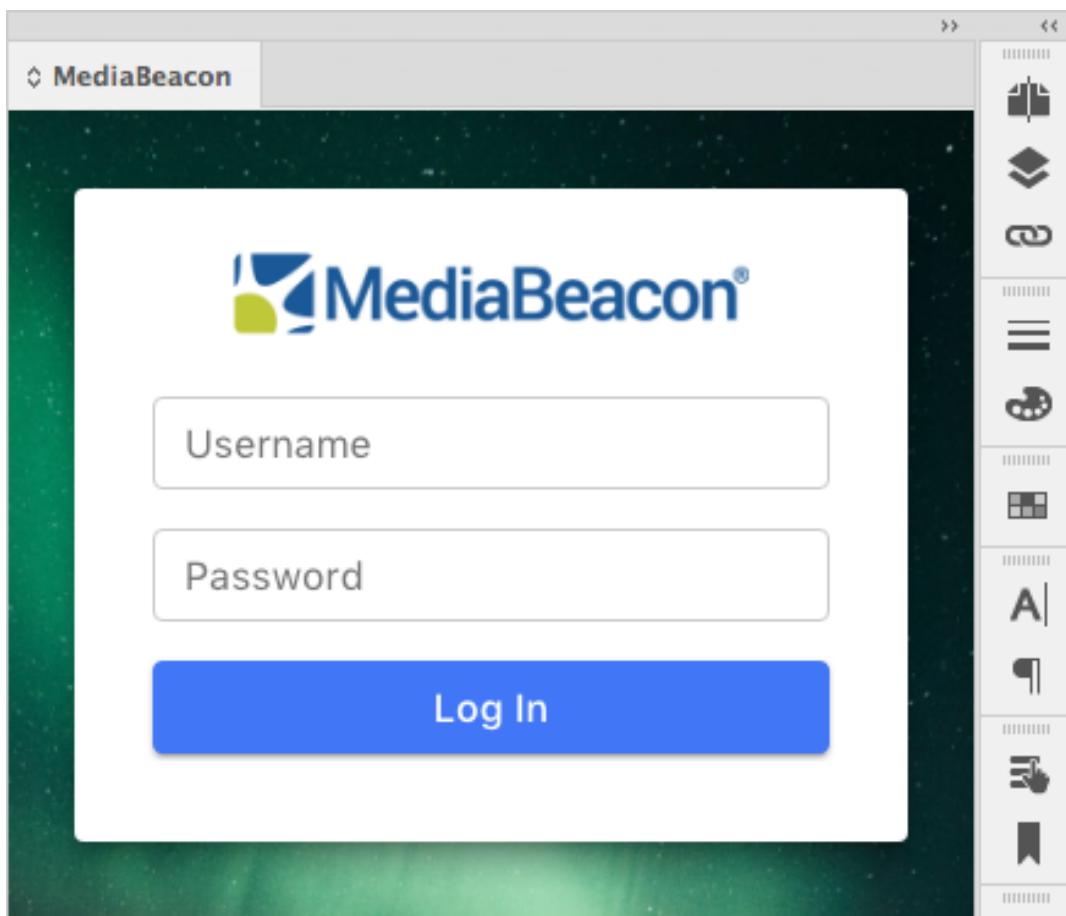
- InDesign: [Manage Windows and Panels](#)
- Illustrator: [Customizing Workspace](#)
- Photoshop: [Manage Windows and Panels](#)

Logging into MediaBeacon via the Connector

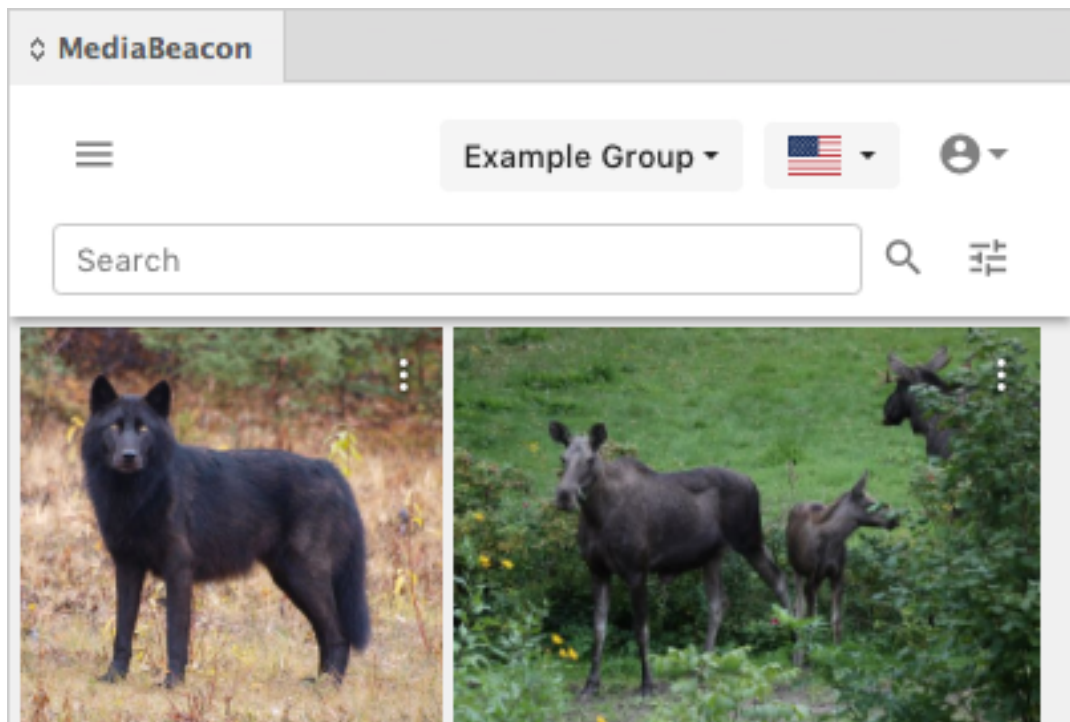
- The Connector allows the user to enter the URL for a MediaBeacon server when displaying the "MediaBeacon URL" screen.



- The URL entered must include `http://` or `https://`
 - The easiest method is to copy the URL from a browser window while logged into MediaBeacon.



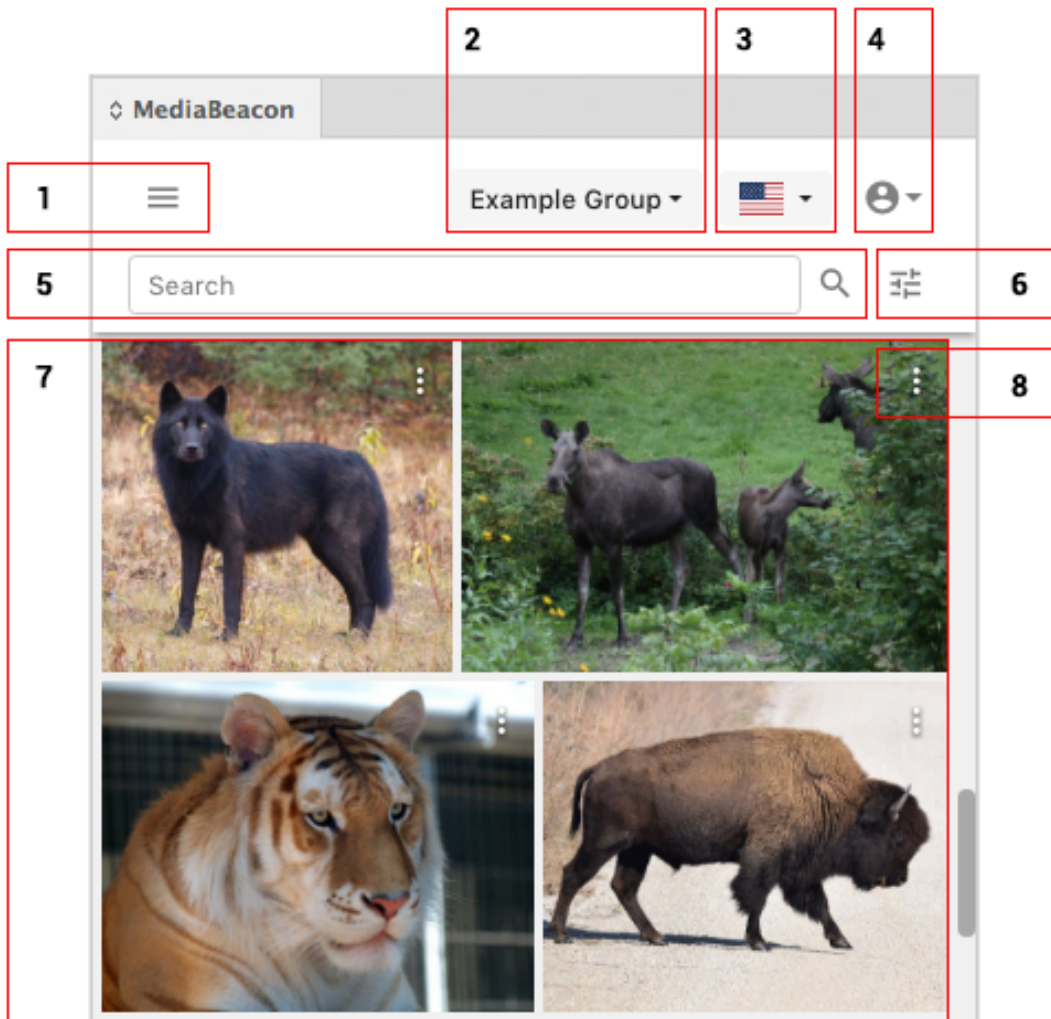
- The user will enter username and password, and when authenticated, the plug in panel will be displayed in "logged in" mode.



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



1. **Directory Panel Toggle:** This button opens the folder browser, showing the folders and Saved Selections available in the current MediaBeacon ACL.

Figure 23: Toggle Button

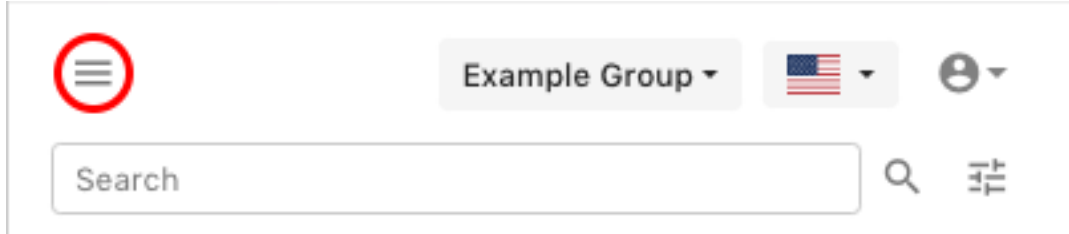
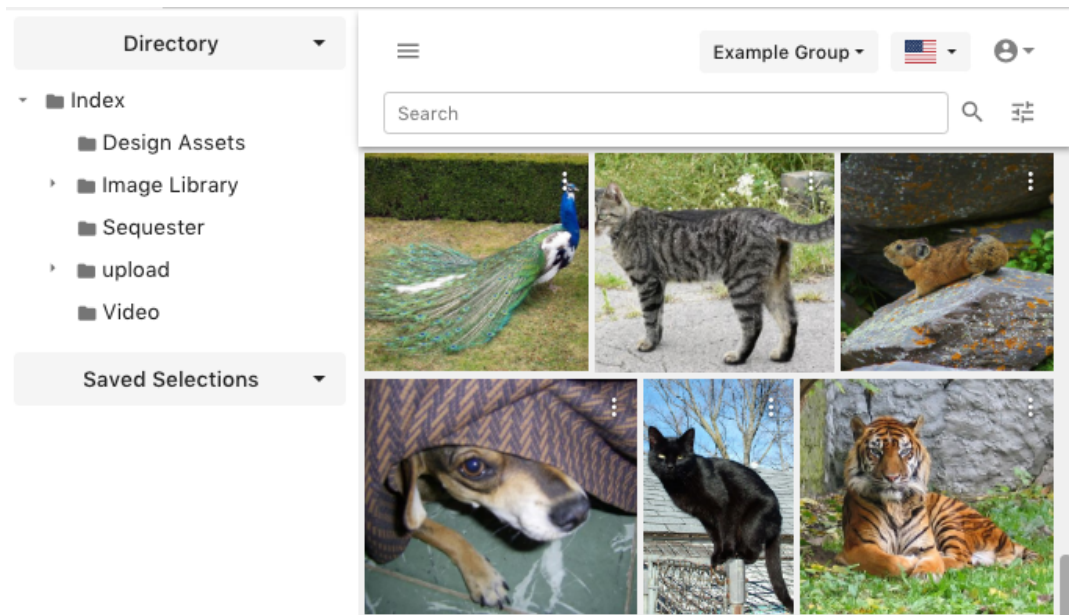
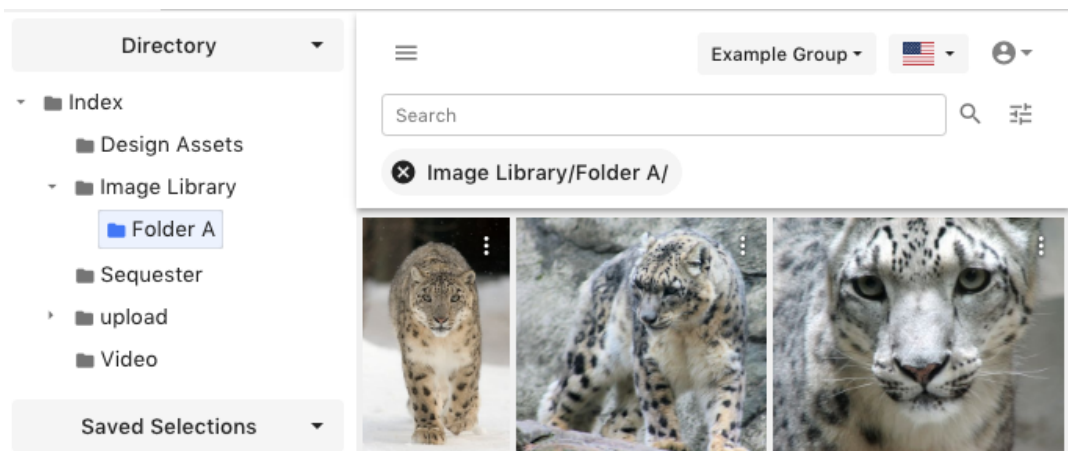


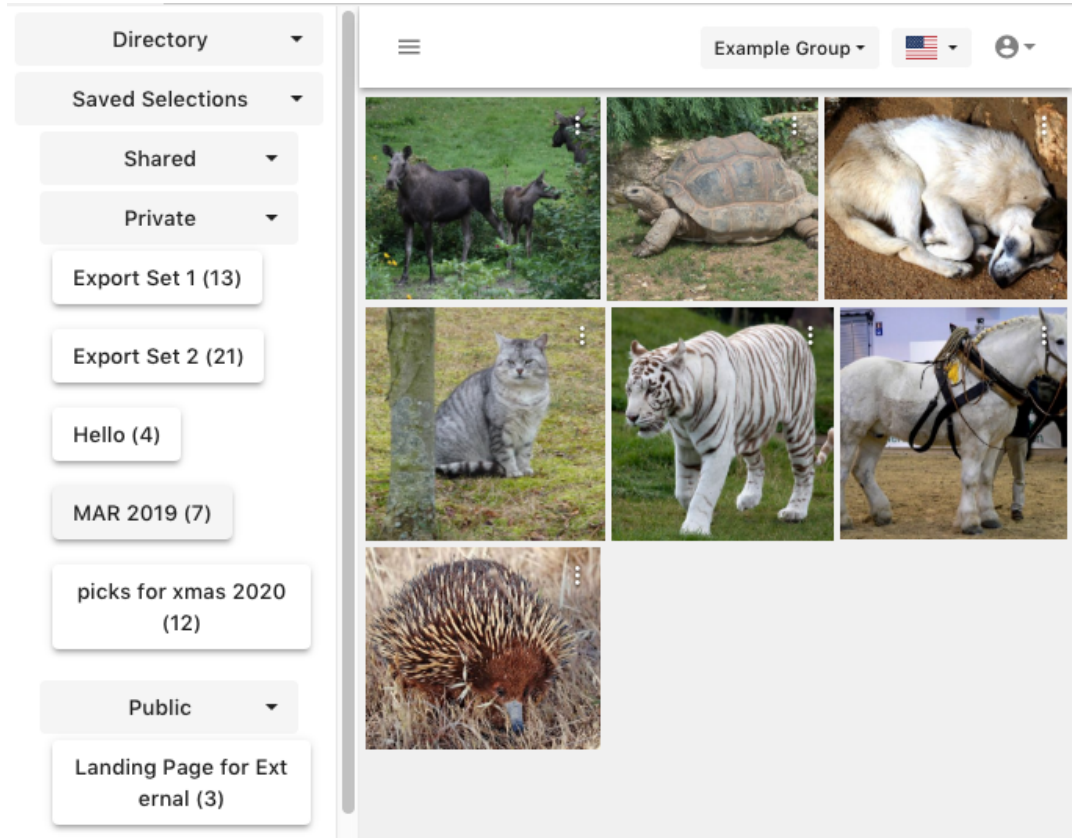
Figure 24: Directory Panel opened



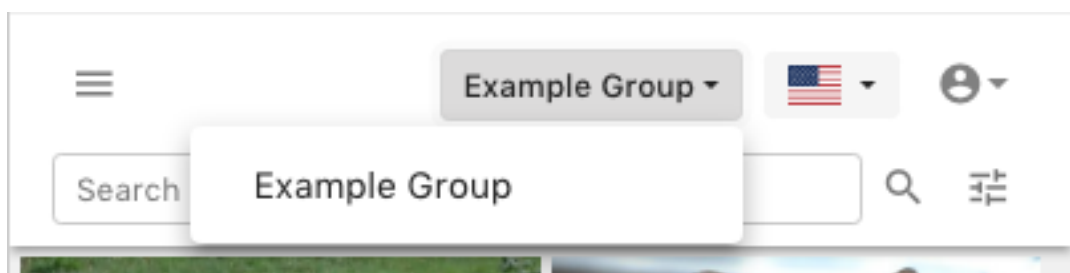
- a. **Directory tab:** When spun open, this area displays the folders on the DAM to which the user has access. When a folder is selected, the asset browser will be filtered to show contained assets, and a path indicator is also displayed. Clicking the circled "X" button will clear that folder filter.



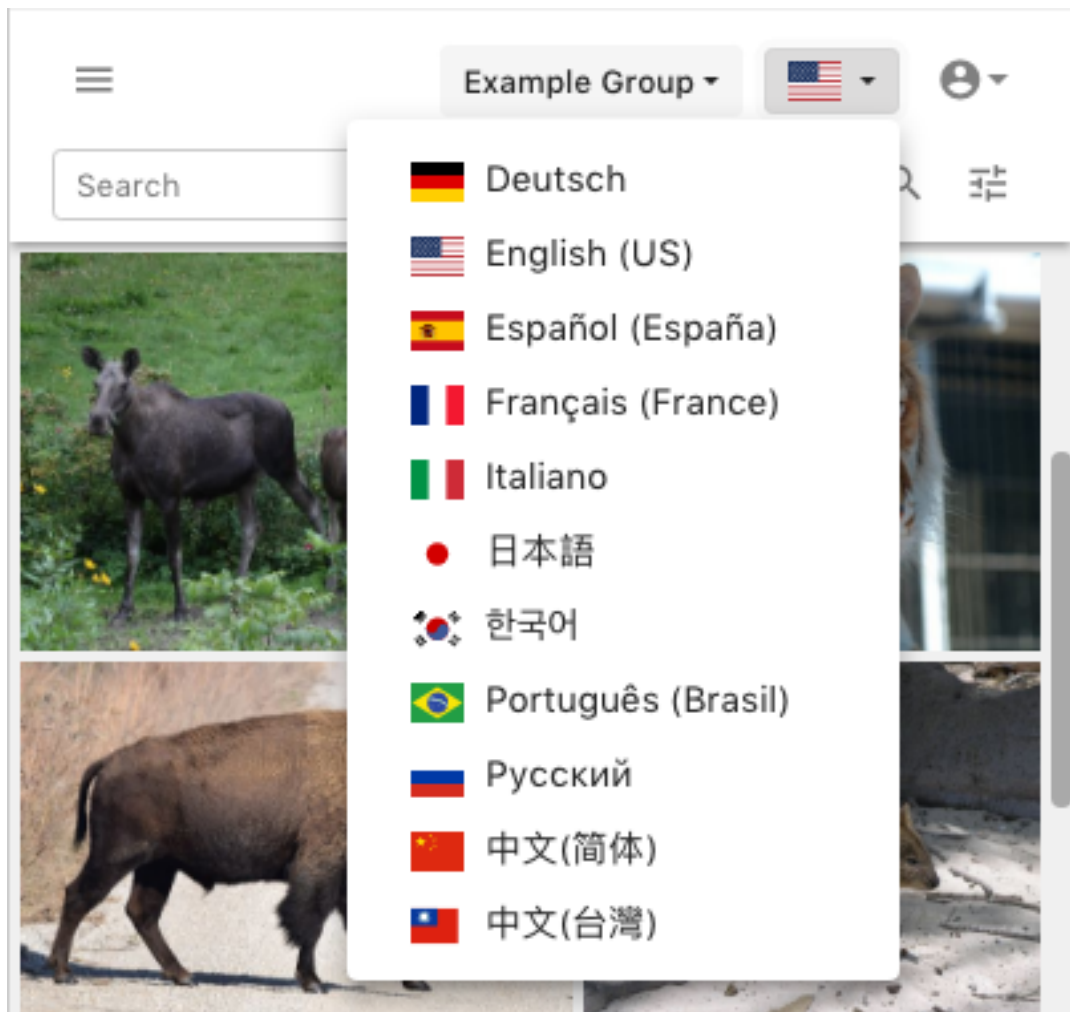
- b. Saved Selections tab:** When spun open, this display 3 further tabs of saved searches (Shared, Private and Public). When any of those categories are spun open, a list of saves searches are displayed, and upon clicking one, the asset browser filters for only the assets in that selection. Note: when a saved selection is loaded, the search bar is not shown.



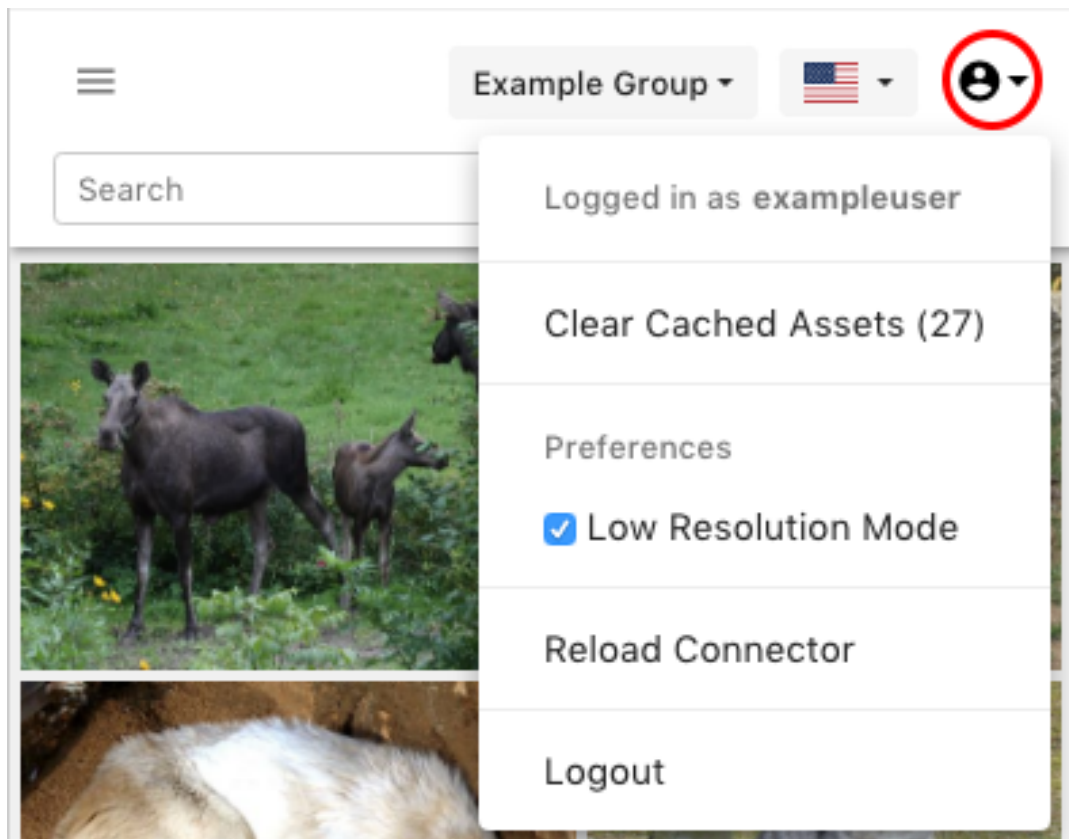
- 2. ACL Menu:** Allows the user to choose an ACL to which they have access in the MediaBeacon system. This allows the user to view and use assets accessible to that ACL.




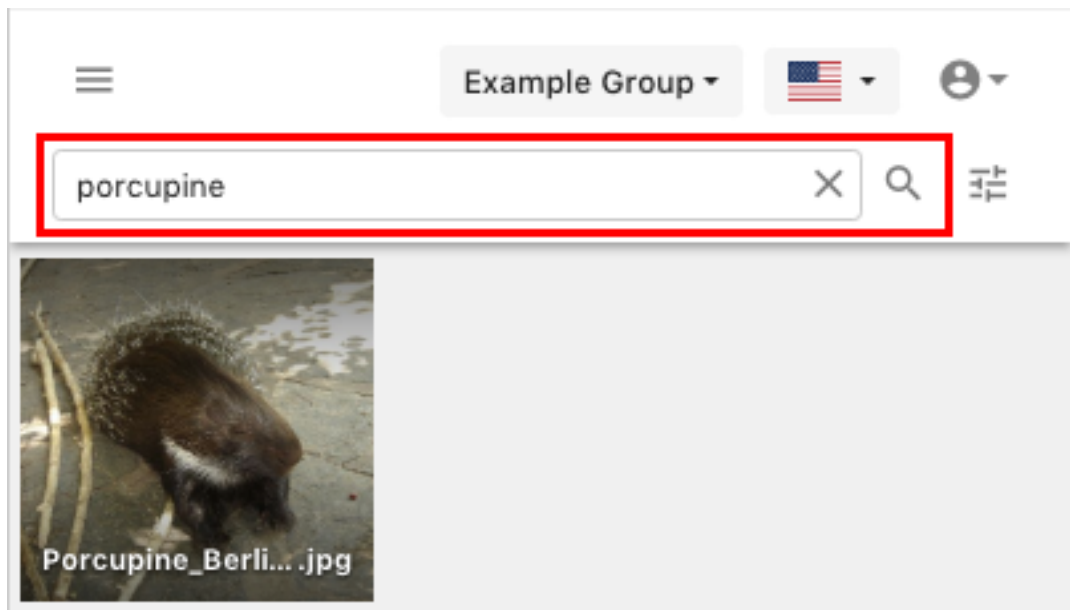
- 3. Language Menu:** Changes the language of the Connector interface.



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's MediaBeacon account.
5. **Search Field:** A simplified QuickSearch field. Strings entered here search all metadata in the current ACL's assets.

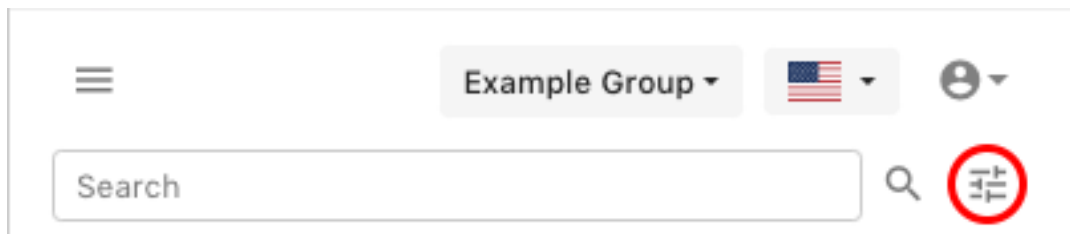


- a. **Clear Search** Button ("x" icon): This button clears the current search.
- b. **Magnifying Glass** Button: Clicking this button, or pressing the return key will execute the quick search.

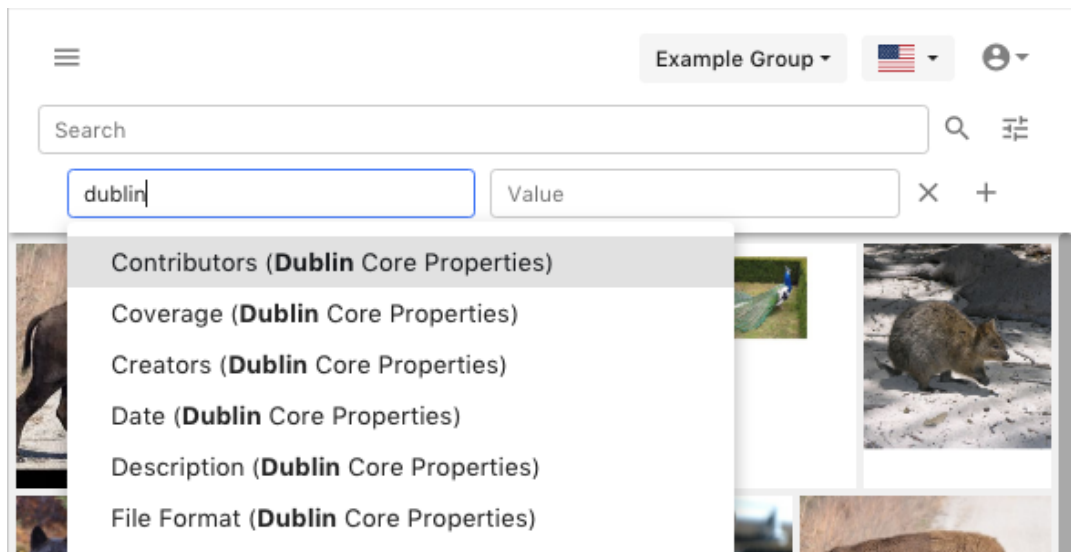


Note: Clicking the magnifying glass button when the quick search is empty will reload the assets in the connector's Asset Browser.

- 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.

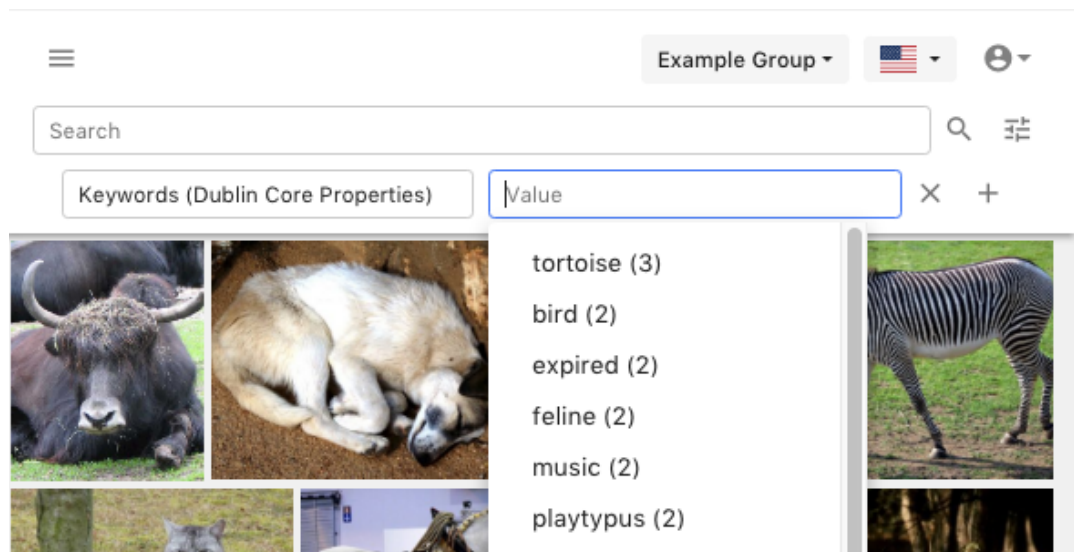


- a. **Field:** Allows the user to select a XMP field to search within. Entering text here will display a pulldown with XMP fields that match the entered string.



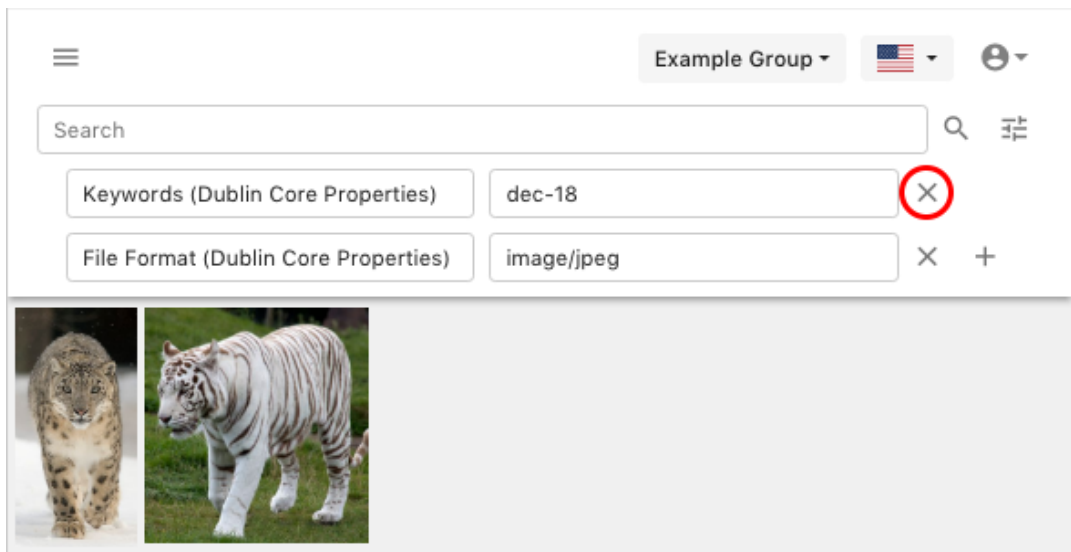
b. Value: Allows the user to enter a search value.

- a. Filter Search 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.

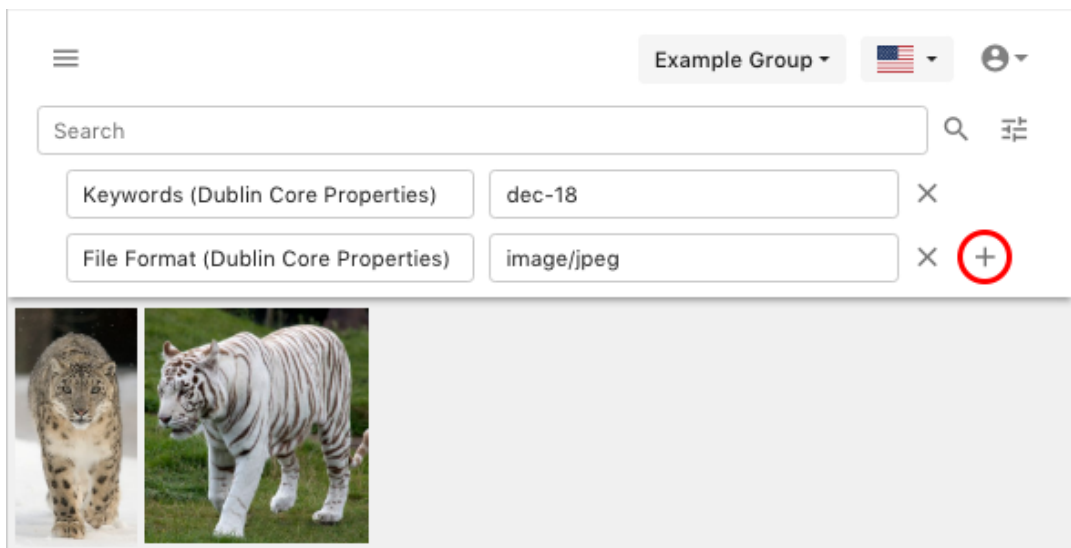


- b. This function is similar to the Filter Search in the MediaBeacon Web UI, but is not as comprehensive. Each advanced search row's fields do not filter values shown in subsequently added rows.

c. Clear Search Row Button ("x" icon): This button removes the adjacent search row.

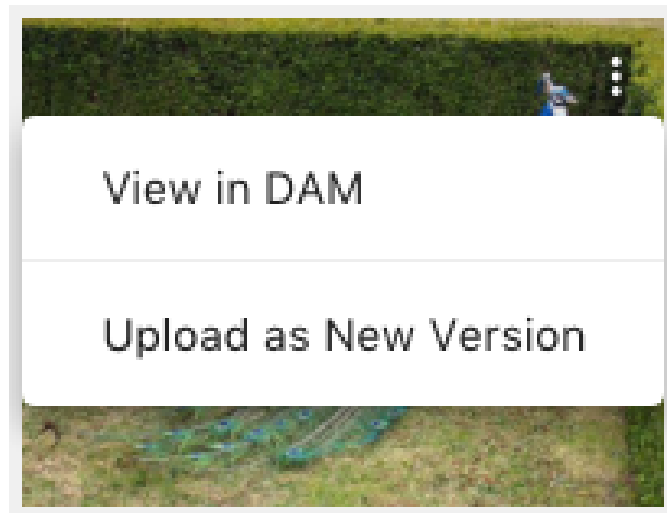


d. **Add Search Row** Button (+ icon): This button adds a search row.



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.

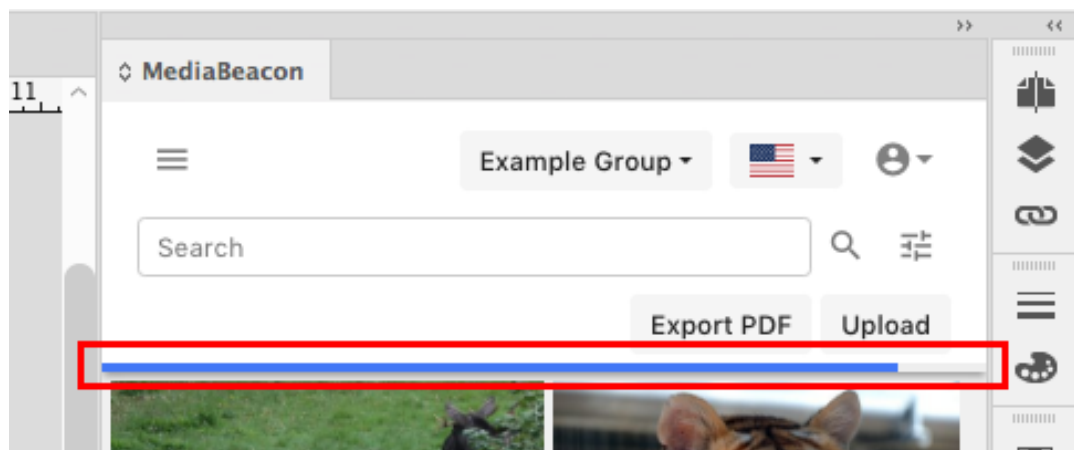


- a. **View in DAM:** This command opens a browser window to display the asset's Asset View. This requires the user to login via the browser if not already authenticated.
- b. **Upload as New Version:** This command allows the active document (if in a saved state) to be uploaded as a new version of an asset.

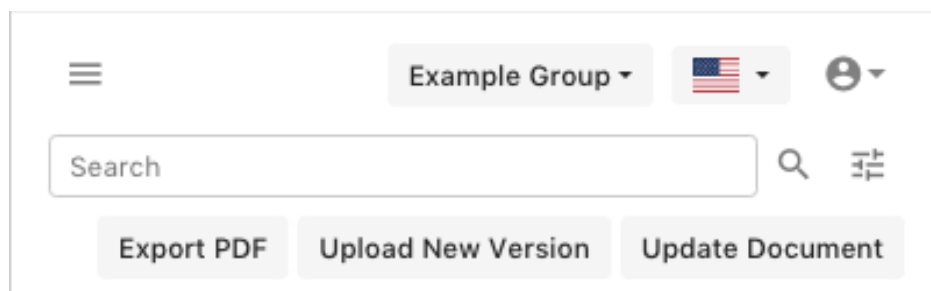
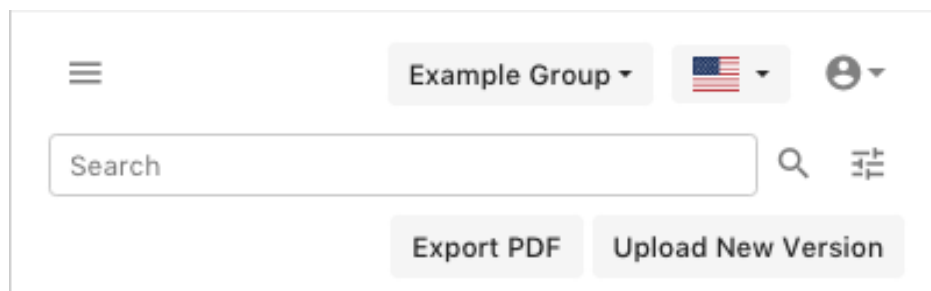
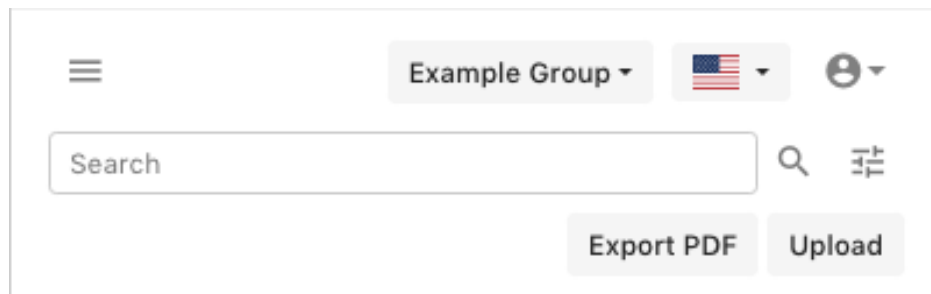


Note: "Upload as New Version" menu command vs. "Upload New Version" button: The menu command is considered a secondary function, useful when the user wishes to upload a new document as a document version. In most cases, the **"Upload New Version"** button will be preferable.

- 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 in MediaBeacon. 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:

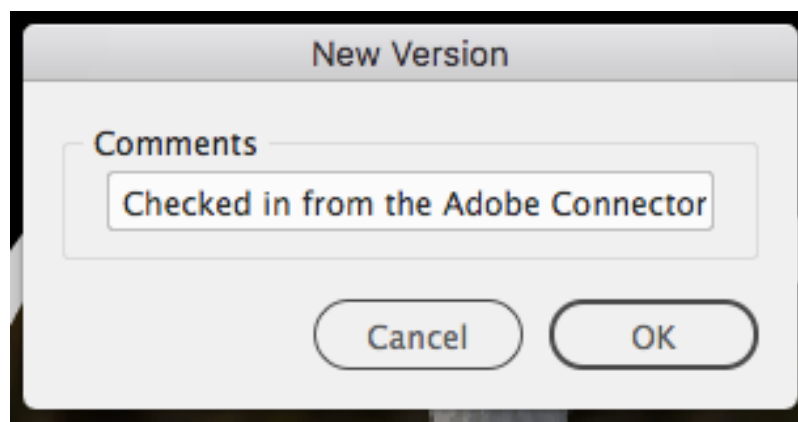
- The active document is saved to user's local disk.
- The active document isn't recognized as a MediaBeacon asset.

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](#) 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 to MediaBeacon. 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

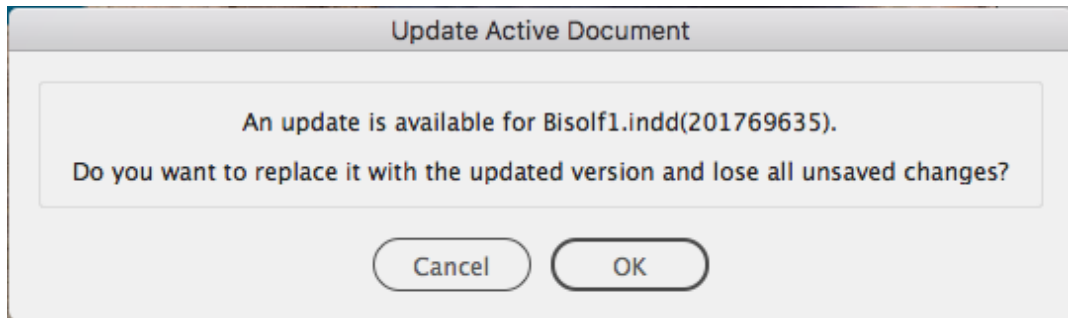
This button is displayed when the Connector detects that the currently opened document is older than the copy stored in MediaBeacon. This occurs when another user uploaded a new version of the asset,

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.

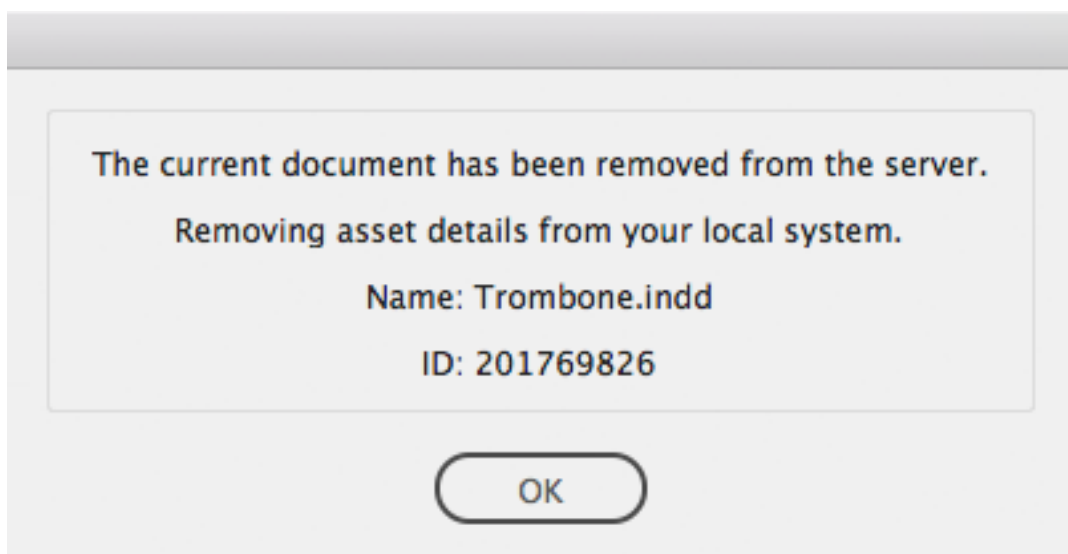


This button is displayed if all of the following are true:

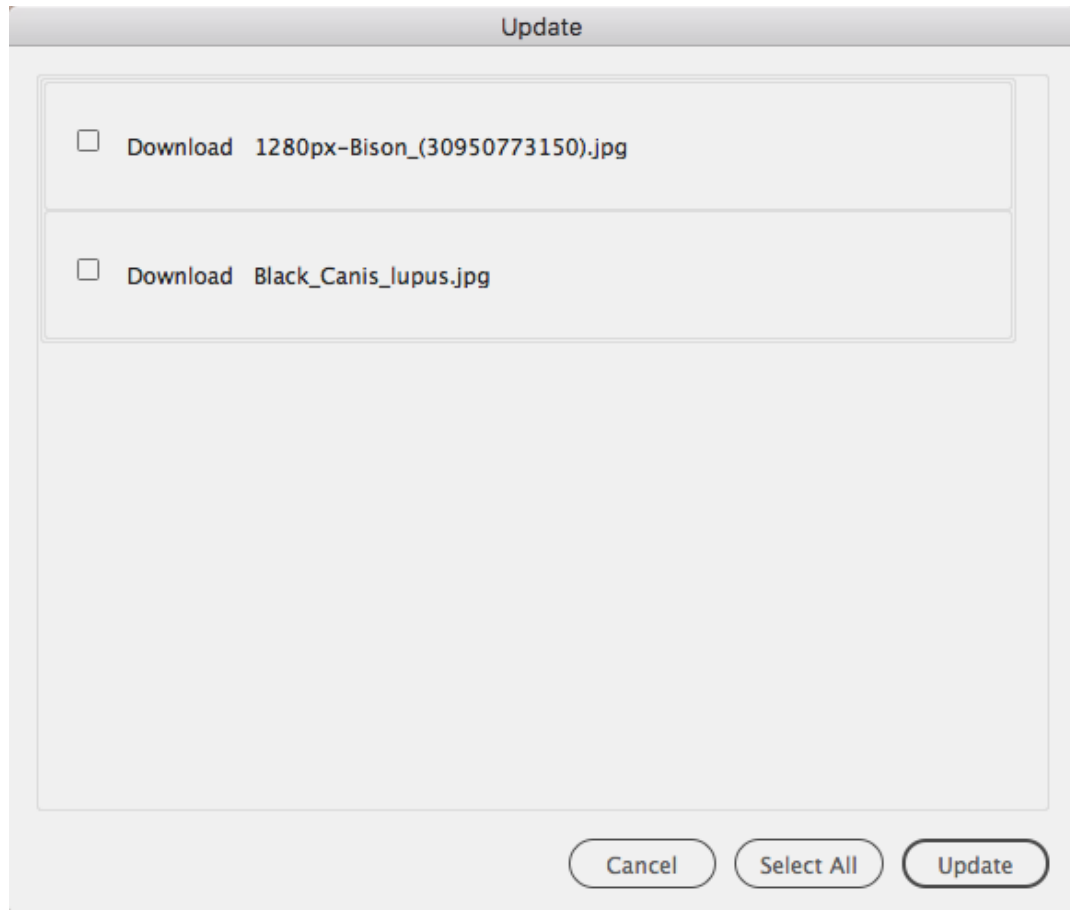
- The active document is saved to user's local disk.
- The active document is recognized as a MediaBeacon asset.
- There have been changes made to the active document (or placed assets used in the active document) in MediaBeacon.
 - Changes that trigger this state can be an update to metadata, or a new 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.

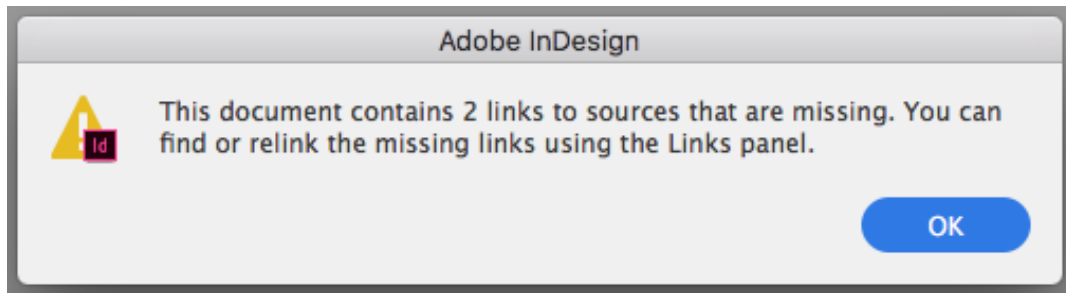
Connector Browser Functions

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.

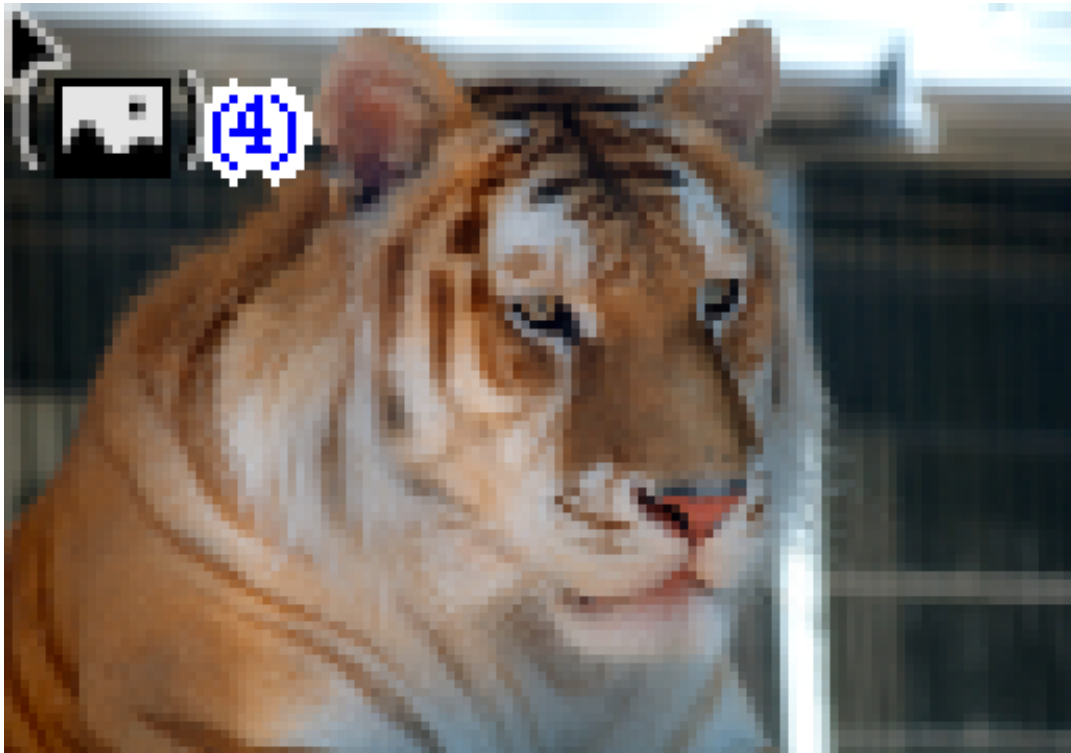
Placing MediaBeacon Assets

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:

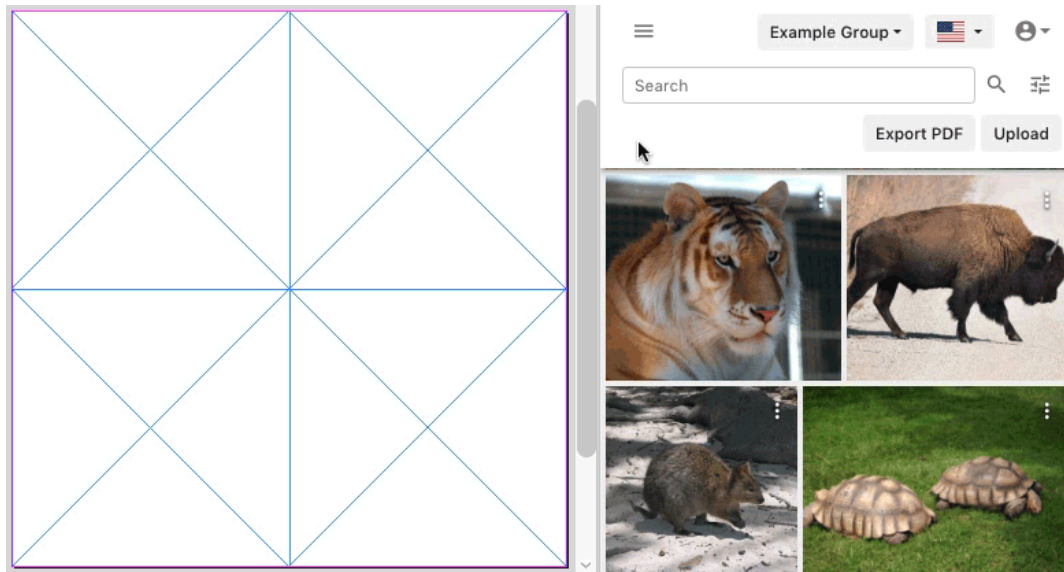
1. Left-click, hold and drag from the Connector's Asset Browser to a page region of an open layout document.
2. Release the left mouse button.
3. When the cursor changes to display an image thumbnail of the image, left-click to place the image at 100%, or left-click, hold and drag to define the size of the placed image, or drop into an image frame.





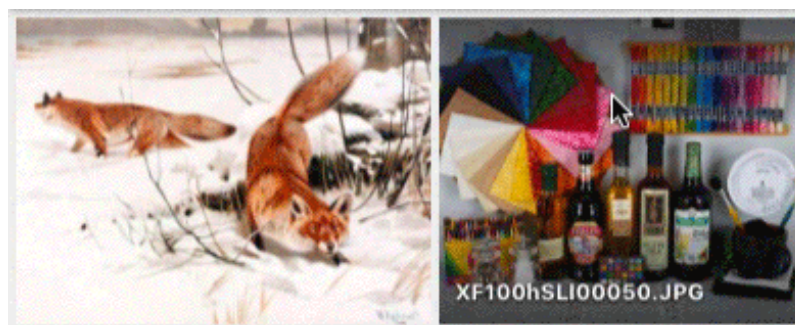
Note: When using InDesign®, it is not necessary to 'drag' an image from the connector's asset browser to the active document. The action is just as easily accomplished with a "cursor loading" action, see below.

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

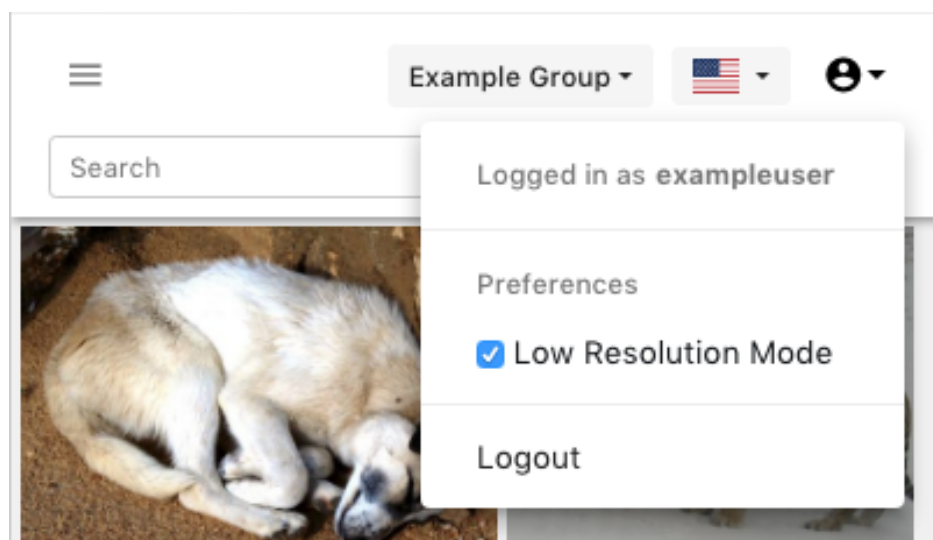
To refresh the list of assets:

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

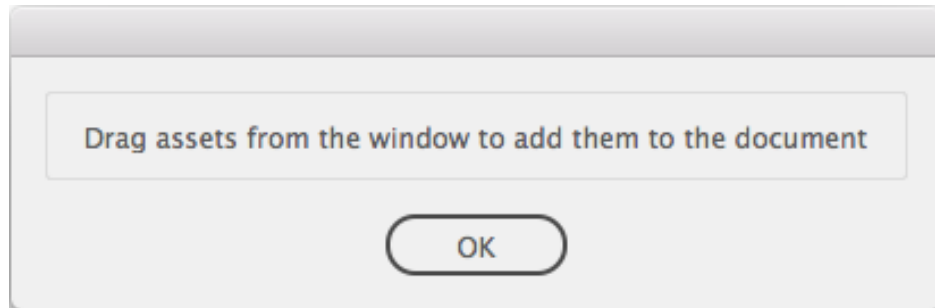
In order to use the "Show Import Options" InDesign® function with images in the Connector asset browser:

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".

6.2.2. Clarifai® Connector

Use the Clarifai® AI to automatically tag assets with metadata.

Clarifai®

The Clarifai® Connector enables automatic metadata tagging in MediaBeacon for 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.

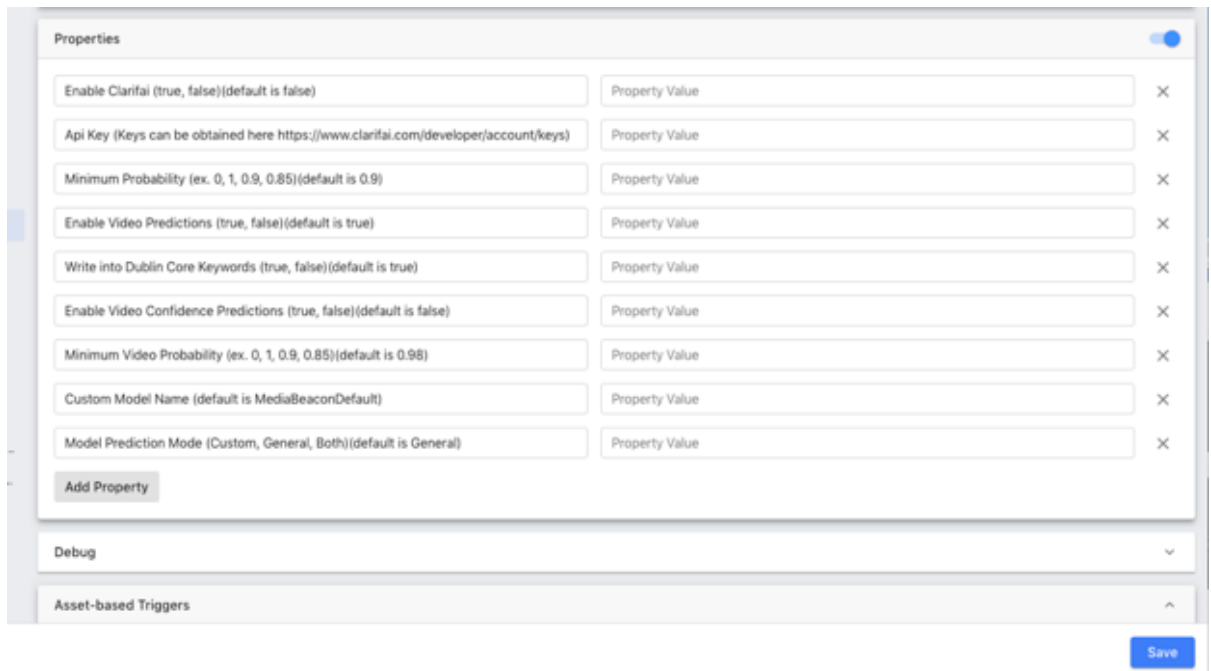
Installation and Configuration

The MediaBeacon Clarifai® Connector is installed via a licensed package.

Once the package is installed, configure the connection.

1. In the MediaBeacon 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.

The screenshot displays the MediaBeacon interface. On the left is a large image of a muscular man in a boxing ring. On the right is an 'Info' sidebar with the following sections:

- Clarifai Data**: Includes a 'Hide Empty Fields' button.
- Keywords**: A list of tags including athlete, one, adult, portrait, people, man, indoors, competition, and shirtless.
- Values**: A list of confidence scores for the keywords: athlete (98.8%), one (98.6%), adult (98.6%), portrait (98.7%), people (97.9%), man (97.2%), indoors (96.9%), competition (91.2%), and shirtless (90.8%).
- Collect Predictions
- Discussion**: A dropdown menu.

7. Server Based Configuration

In this section you can read about the server based configuration in MediaBeacon.

7.1. Single Sign On

If Single Sign On is configured in the Control Panel Gui App (Server-Side), the user will not be able to reset their password in the Web UI.

7.2. Global Default Icon

The default icons shown in various interfaces may be changed with a set of system properties:

7.2.1. Global Icon Key

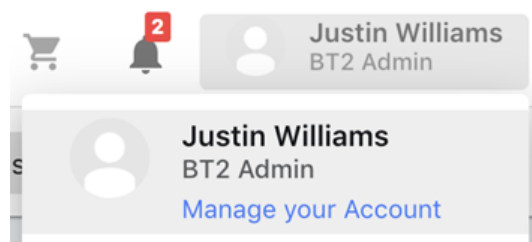
- “Home” button on workspaces. This still may be overridden by workspace “Home” icon assignments.
- Login Component Logo.
- External Links Logo

These may be replaced with a logo resident in the Icon Picker, and implemented with a system property: “mb.global.icon.key=UUID”.

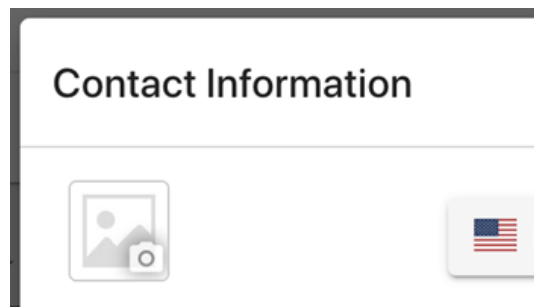
Example: mb.global.icon.key=05155BD9-3A93-4AB3-8025-13872B0079D3

To implement:

1. Open the User Menu and select “Manage your Account”



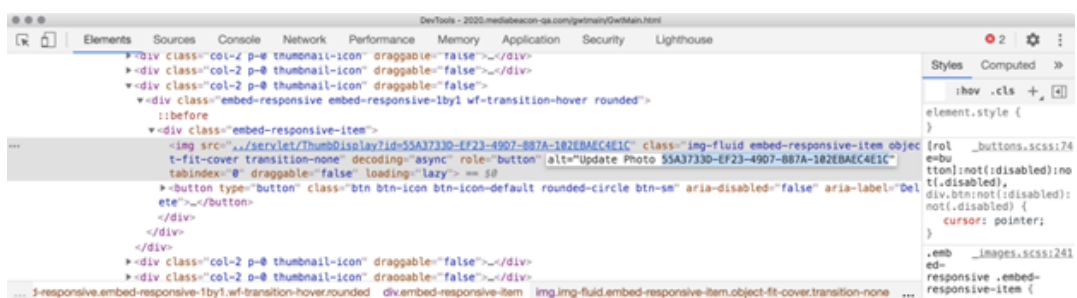
2. Click the picture icon in the left. This will open the Icon Picker.



3. In the Icon picker, add a new icon by clicking "Upload?". A PNG image of a minimum of 252 px X 45 px is recommended.



4. Once the icon is upload and visible in the dialog, open your browser's developer tools menu (usually Shift-Right Click) and choose "Inspect".



5. Copy the UUID as listed above.
6. In the mediabeacon.properties and catalina.properties files, add the System Property as listed above, substituting your UUID.

7.3. MediaBeacon Port Information for Remote Components

MediaBeacon has a number of remote components that can be used in conjunction with the core MediaBeacon application. Below are the default ports various components use to connect.

Tomcat Webhead

- Connects to MediaBeacon R3volution core: 44444, 44445, and 44446.
- Connects to R3Search node(s): 30000.
- Connects to Zookeeper(s): 31000.
- Connects to external authentication server, if in use (Active Directory, LDAP, etc.)
- Connects to MediaBeacon core: 55565 (assuming the built-in Web Server runs on port 55555; the port that is connected to is 10 higher than what is configured for the built-in Web Server).

Remote Preview Node

- Connects to MediaBeacon R3volution core: 44444, 44445, and 44446.
- Connects to the database.
- Connects to the file system.

Remote Import Node

- Connects to MediaBeacon R3volution core: 44444, 44445, and 44446.
- Connects to the database.
- Connects to the file system.

Remote R3search

- Connects to MediaBeacon core: 44444, 44445, and 44446.
- Connects to R3Search node(s): 30000.
- Connects to Zookeeper(s): 31000.
- Connects to the database.

Remote Zookeeper

- Connects to MediaBeacon core: 44444, 44445, and 44446.
- Connects to R3Search node(s): 30000.
- Connects to Zookeeper(s): 31000, 31001, 31002.
- Connects to the database.

MediaBeacon Core

- Connects to R3search: 30000, 31000, 31001, 31002.

- Connects to Tomcat Webhead: 8080 (default port).

7.4. Upgradation Parameters of MSSQL

Upgrading to MediaBeacon 22.07 requires the following

- **encrypt=true; trustServerCertificate=true;** add these parameters to the JDBC string of the new MSSQL driver.