



Informatica MDM – Product 360

Media Manager – User manual, Web

Version 8.1.1 (English)

Informatica MDM - Product 360 - Media Manager
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1 Product 360 Media Manager - Introduction

Product 360 Media Manager is an enterprise solution for Media Asset Management and Web to print. Product 360 Media Manager enables unstructured data such as images, videos, graphics, drawings, and documents to be managed centrally and used multiple times as required.



Note: The contents of the PDF and HTML versions of the documentation are identical. You can therefore select the format that you find easier to read: Either online as a PDF or HTML version or offline by printing the PDF version.

To make it easier for you to understand the connections in Product 360 Media Manager, you will find hyperlinks to related topics at all relevant points. For this reason, we recommend using an online version in preference to a printed version.

Enjoy working with Product 360 Media Manager 8.1.1!

1.1 Typographic conventions

In this documentation, the following conventions apply:

1. Instructions are numbered step by step.
2. This is the second step of the instructions.
 - ⇒ System reactions are indicated by an arrow.
 - Screen element names appear in inverted commas: "User name".
 - Button names are highlighted in color: **Delete**.
 - Paths, file names, and console entries are displayed in a different font so that they are instantly distinguishable: C:\Program Files\.

Now and again, relevant text images indicate particular notes, tips or warnings, as shown in the following examples:



Note: This includes notes on particular features.



Information: Provides additional information about the current topic.



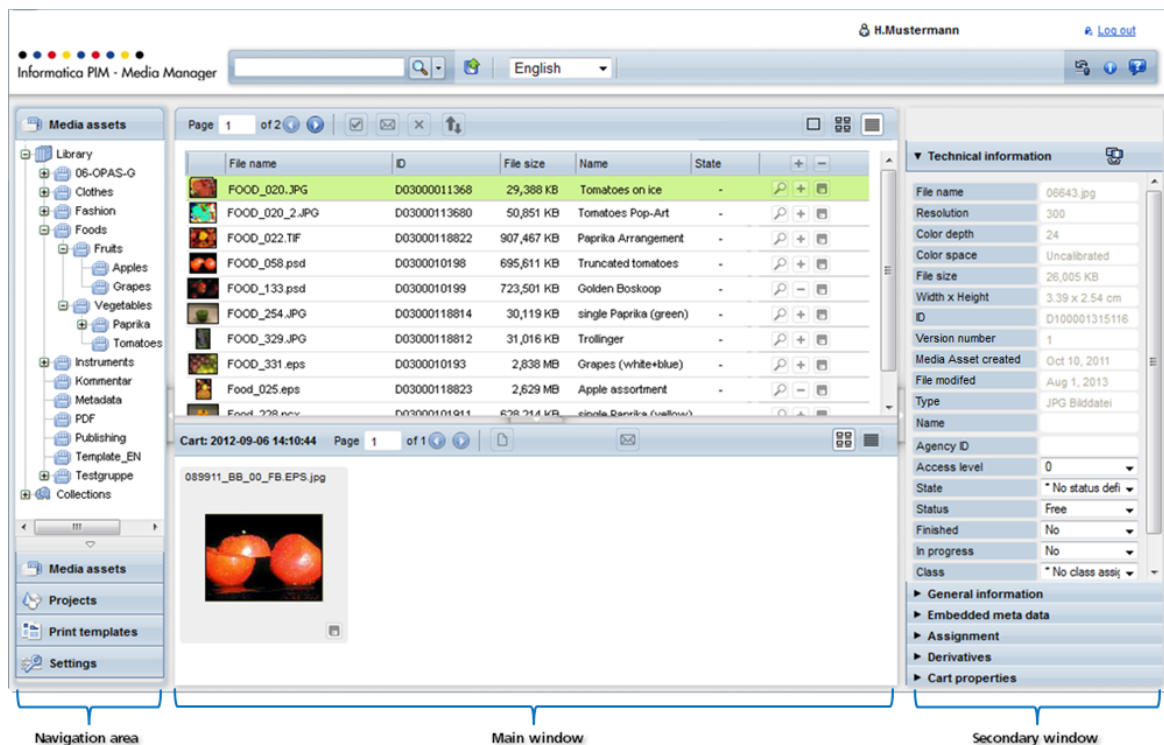
Tip: This includes tips and help.



Caution: This includes warnings about sources of errors and how to avoid them.




1.2 Notes on use

The Product 360 Media Manager Web interface is divided into several areas.



Web interface

On the left is the navigation area. Here, you can use the lower section of the menu to select whether you want to manage media assets or edit print templates, for example. In the center is the main window. The cart is displayed in the lower section here, if applicable. On the right is the secondary window, which displays information on the selected object in the main window. The upper area of the interface includes the search and the link for uploading files.

You can hide or show the individual areas by clicking on  or  between the individual areas. You can change the width of the area by dragging it with your mouse to make it larger or smaller. To restore the basic settings of the interface, click on  at the top right of the screen.

1.2.1 Text fields

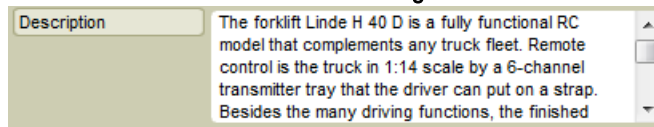
Data is input and output using tables, dialog boxes, and also forms. Depending on the underlying [profile](#)^[53] and the set [authorizations](#)^[50] these are displayed in different modes.

Standard mode

Standard mode is used for data output. The field height adjusts to the content. The minimum is one line, the maximum six lines. For longer text content, a scroll bar is displayed.

A screenshot of a text input field in standard mode. The field is labeled 'Text' and contains the text 'spring catalog information 2013'. A small red square highlights the end of the text.

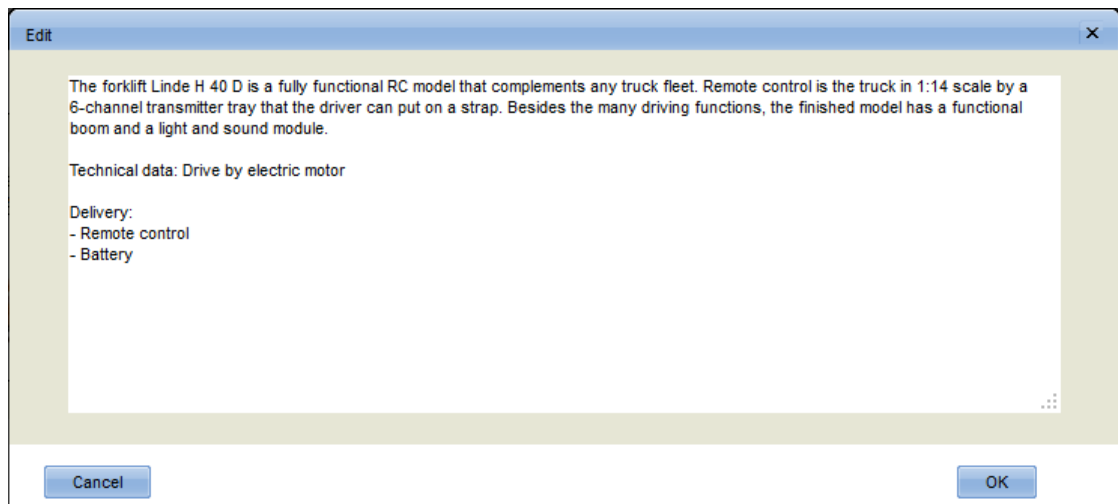
Standard mode single line

A screenshot of a text input field in standard mode. The field is labeled 'Description' and contains a long paragraph of text. A vertical scroll bar is visible on the right side of the field.

Standard mode with scroll bar

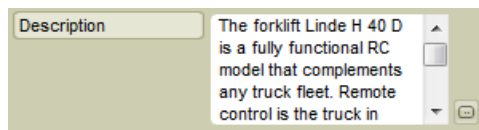
Advanced mode

Advanced mode is used to enter very long texts.

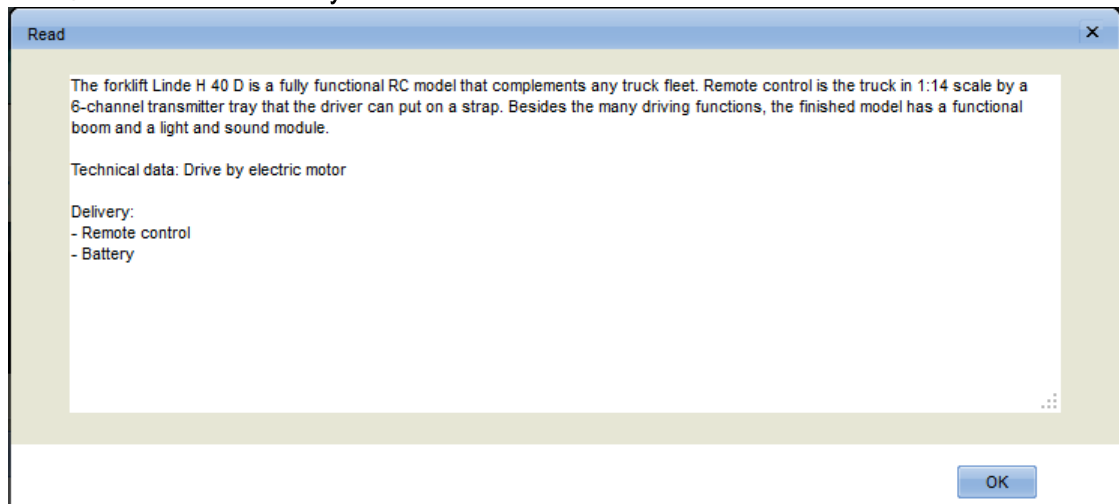
A screenshot of an 'Edit' dialog box in advanced mode. The dialog box has a title bar with 'Edit' and a close button. The main area contains a large text field with the following text: 'The forklift Linde H 40 D is a fully functional RC model that complements any truck fleet. Remote control is the truck in 1:14 scale by a 6-channel transmitter tray that the driver can put on a strap. Besides the many driving functions, the finished model has a functional boom and a light and sound module.' Below this, there is a section for 'Technical data: Drive by electric motor' and a 'Delivery:' section with a list: '- Remote control' and '- Battery'. At the bottom of the dialog box, there are 'Cancel' and 'OK' buttons.

Advanced mode

Read only access



Standard mode read only access



Advanced mode read only access

2 Media-Assets

You can use the Media Asset Management system to manage your media assets. Here, you can structure the media assets, index them, search for them, edit them and assemble them in a cart for automated processing.

To go to the Media Asset Management system, open the "Media assets" area in the navigation area in the bottom left.

2.1 Using the interface

Besides the general interface structure as described in [Notes on use](#)⁶, there are a number of distinctive features in the "Media Assets" area, which are described in the following section, in particular the display options in the central main window.



Note: For information on the secondary window on the right, see [Indexing media assets.](#)¹⁹

2.1.1 Navigation tree functions

The navigation tree has the following nodes, of which the one currently selected is highlighted by bold formatting:

Library

This contains all the groups and subgroups defined in the system. The first level is automatically displayed as expanded.

Collections

Use collections to structure your media assets. You can create and share private and public collections individually.

Search queries

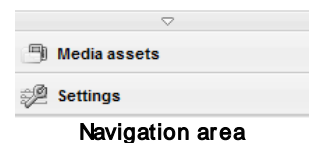
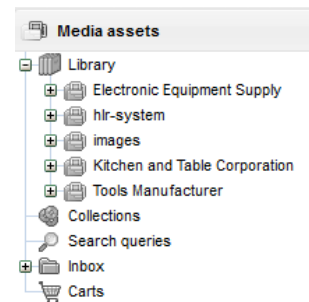
This node contains all the [search queries](#) you have saved.

Inbox




Files that have been uploaded are displayed in the groups tree in "Inbox". These can be [indexed](#) directly, including multiple media assets at the same time. Use drag & drop to assign the uploaded files to groups and collections.




























Carts

Below this node you will find all [carts](#) already created.




2.1.2 List view

Click on ,  or  to switch between the list view, the [light table view](#) and the [detail view](#).

File name	ID	File size	Name	Status	
 51180_1.jpg	D1200010729703	11.899 KB		-	 
 51188_2.jpg	D1200010729704	12.133 KB		-	 
 51190_2.jpg	D1200010729705	18.566 KB		-	 
 51192_1.jpg	D1200010729706	11.468 KB		-	 
 51196_3.jpg	D1200010729707	16.751 KB		-	 
 51215_1.jpg	D1200010729708	11.478 KB		-	 
 51243_2.jpg	D1200010729709	12.475 KB		-	 
 51250_1.jpg	D1200010721599	9.787 KB		-	 
 51250_1.jpg	D1200010721600	9.772 KB		-	 






List view

- Besides a preview, the list view displays the file name, the ID, the file size and an additional description.
- Click on  to place the media asset in the [cart](#) currently open in the secondary window below.

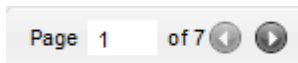
- Click on  to remove the media asset from the cart open below.





Note: These two options are dependent on whether the cart that is currently open contains a corresponding media asset or not.

- Click on  to download a media asset to your computer.
- Click on  to open the [detail view](#).^[12]
- Click on  to select all assets in the list at once.
- You can also make multiple selections. To do this, hold down CTRL and click with the left mouse button.
- If the list is several pages long, click on  and  to scroll.
- Moving the mouse over the page navigation displays a tooltip showing the number of media

assets found:






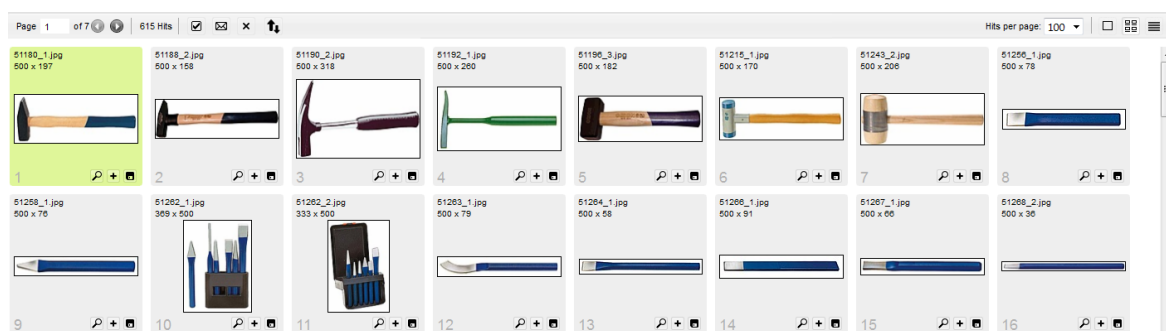
- Clicking on a column title allows you to sort the list;  and  indicate the sort order.







Note: The columns displayed in the list view are defined in the [profile settings](#).^[43]

2.1.3 Light table view


Click on , , or  to switch back and forth between the [list](#)^[10], light table, and [detail view](#)^[12].






Light table view

- The dimensions and the file name are displayed here.
- Depending on whether or not the media asset is in the [cart](#)^[27] that is currently open, you can place it in the cart by clicking on , and you can remove the media asset from the cart by clicking on .
- Click on  to download the relevant media asset to your computer.
- Click on  to open the [detail view](#).^[12]

- You can scroll through the overview and select the objects individually or select several objects at once in exactly the same way as in the [list view](#)^[10].


 **Note:** The columns displayed in the light table view are defined in the [profile settings](#)^[53].

2.1.4 Detail view



Click on , , or  to switch back and forth between the [list](#),^[10] [light table](#)^[11], and detail view. To view a media asset in the detail view:

- Click on  after the media asset.

Or




- Select the desired object.
- Click on  in the menu bar.





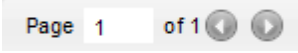


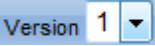
⇒ The selected media asset is opened in the detail view in the main window.

 **Note:** Clicking on  without first selecting a media asset opens the first entry in the list by default.





Detail view

- The file name and the dimensions are displayed in a similar way to the [light table view](#)^[11].
- Use the slider above to change the size of the preview.
- Click on  to place the media asset in the [cart](#)^[27].
- Click on  to download the media asset to your computer.
- Click on  to send a link directly to the corresponding asset. Clicking on the link takes the registered recipient to the login screen and then directly to the corresponding media asset.

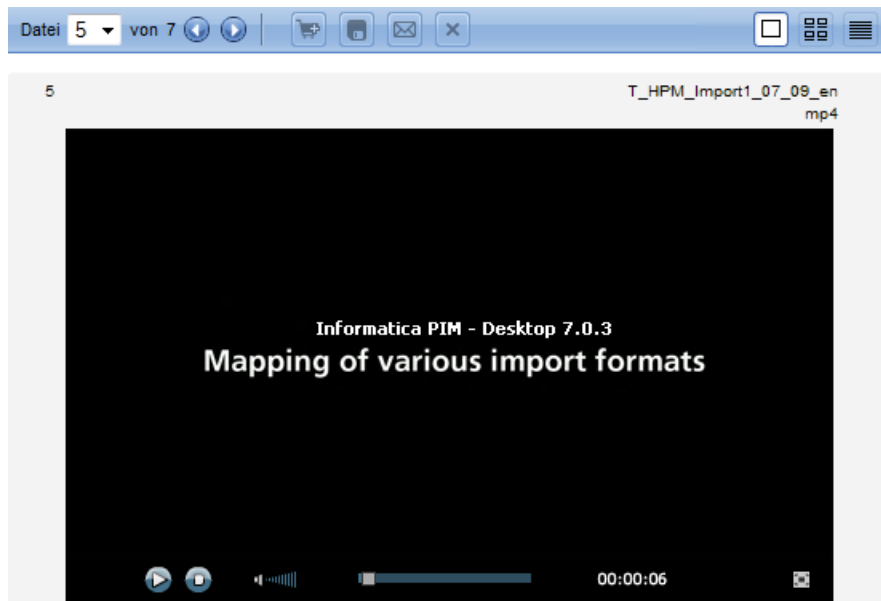
- By clicking  you can share the corresponding object. A click on the link sent leads even unregistered users to the selected object. The user has the option to download the object. It is possible to share up to one hundred objects
- Click on  to delete the media asset.
- Click on  to [create a comment](#)^[26]
- If the media asset is assigned to a project as a component, you can use  to [update](#)^[41] the preview.
- Select the file from the drop-down list  or click on  or  to view all the assets from the group consecutively in the detail view.
- For multi-page documents, you can select the page displayed on the left of the detail view and navigate through the entire document.
- If there are several versions of an image, a further drop-down list opens, in which you can select the version to be displayed: .

In the detail view, you will also see the usage list for the corresponding media asset, if it is being used. The "Usages" window is automatically opened below the cart.

- In the case of an image, all the documents in which the image appears are listed.
- In the case of a document, the images contained in the document are displayed.
- In the case of a multi-page document, you can select whether you want to display just the usages of the current page – i.e. the page selected in the main window – or all the pages.
- You can place selected images from the list in the cart by clicking on  and you can download them to your computer by clicking on .

Video preview

One special feature involves videos in the detail view. In this case, depending on the settings, a short preview may be played. When the detail view is called up, the preview is automatically played using the integrated Flash player.



Video preview

2.1.5 Secondary window

The secondary window is used to obtain information about the media assets and to manage their information. The content displayed depends on the entries selected in the main window. The following topics can be selected:

Technical information

Here you will find all the technical information about the selected media asset. The top section contains information imported automatically when the asset was uploaded. These fields are grayed out, as they cannot be edited. The bottom section is primarily used for indexing and assignment of standard agency editing flags.

If you have initiated a versioning workflow using the Administration module, the corresponding status is displayed here. You can choose from:

- not checked and not up to date
- checked and not up to date
- checked and up to date

General information


Several property fields are available here. They are primarily used for indexing the relevant media asset.

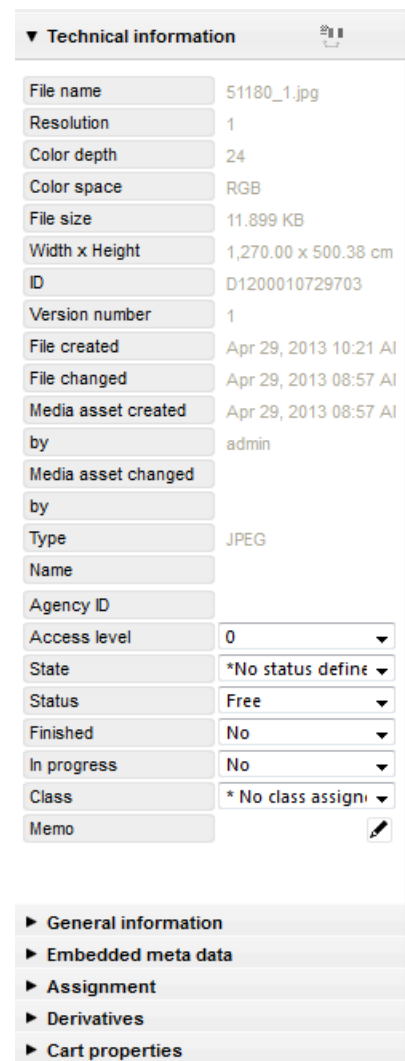
Embedded meta data

Here, you will find all the meta data that was automatically imported when the media asset was uploaded. These fields are grayed out, as they cannot be edited.

Assignment

All the groups to which the selected media asset is assigned are listed here. If the media asset is assigned to a subgroup in the embedded groups under "Libraries", the entire path of the corresponding subgroup is specified here.


Click on  to cancel a group assignment.




The screenshot shows the 'Secondary window' interface. It has a tabbed view with 'Technical information' selected. The 'Technical information' tab contains a list of fields: File name (51180_1.jpg), Resolution (1), Color depth (24), Color space (RGB), File size (11.899 KB), Width x Height (1,270.00 x 500.38 cm), ID (D1200010729703), Version number (1), File created (Apr 29, 2013 10:21 AI), File changed (Apr 29, 2013 08:57 AI), Media asset created (Apr 29, 2013 08:57 AI), by (admin), Media asset changed, by, Type (JPEG), Name, Agency ID, Access level (0), State (*No status define), Status (Free), Finished (No), In progress (No), Class (* No class assign), and Memo. Below this is a list of tabs: General information, Embedded meta data, Assignment, Derivatives, and Cart properties.

Secondary window



Caution: If the relevant media asset is only assigned to a single group and you cancel this group assignment, you can no longer find the media asset using the navigation tree. You can only access the media asset using the [search](#) .

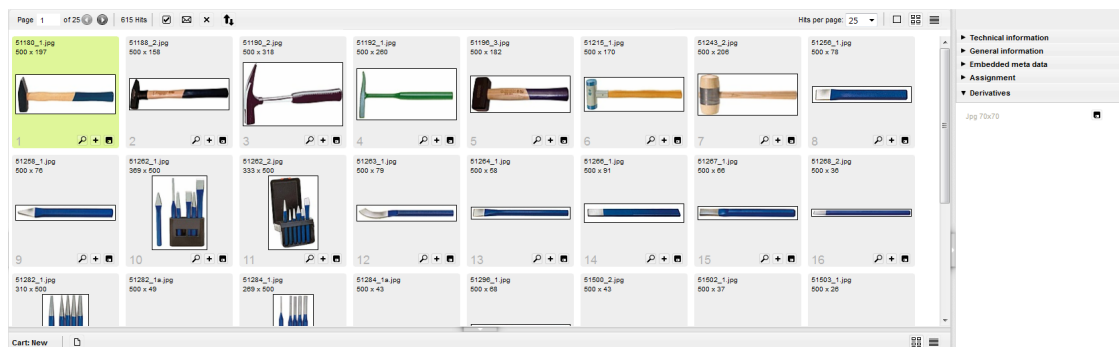
If a media asset is also assigned to one or more projects, it will then be listed. Clicking on  opens the project component in the "Projects" module.


Name	Logo redesign Erstein
Project number	10000039
Status	Free

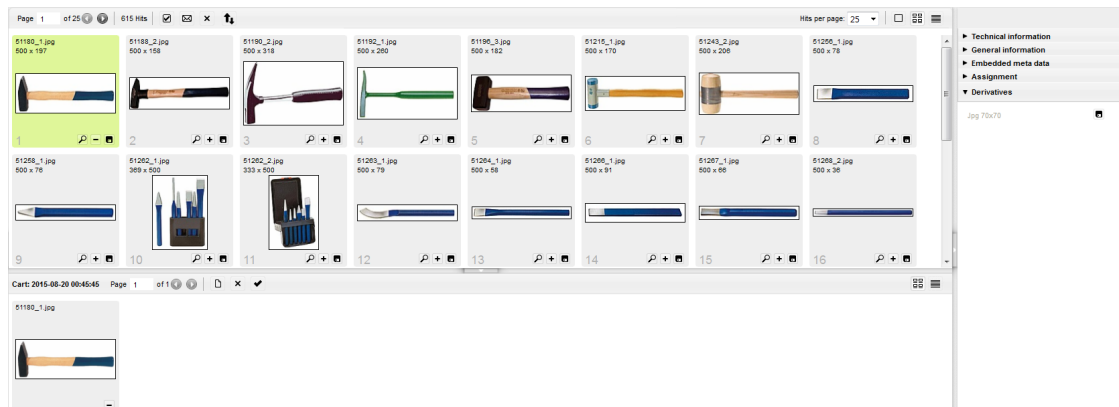
Project assignment

Derivatives

If you are using derivatives, i.e. media assets derived from master assets, the additional "Derivatives" area is available to you. Here, you can download individual derivatives directly without complex conversion.



Clicking on  transfers the derivative directly to the cart. More information about derivatives can be found in the **Product 360 Media Manager (native) manual**.



Cart properties

If a cart is open, the relevant information is displayed here.

A typical application can be found [here](#) ¹⁹.



Information: The activities described depend on your set rights and on the object properties. If an object is locked or has the status "Cannot be ordered", it cannot be edited. Your rights are controlled by assignment to an organization or user group, and by the settings in the profiles assigned to you.

2.2 Uploading new media assets

You check in a media asset as follows:

1. Click on  in the menu bar.


⇒ The window for uploading media assets opens:



2. Click on **Browse** to select a file from the file system.

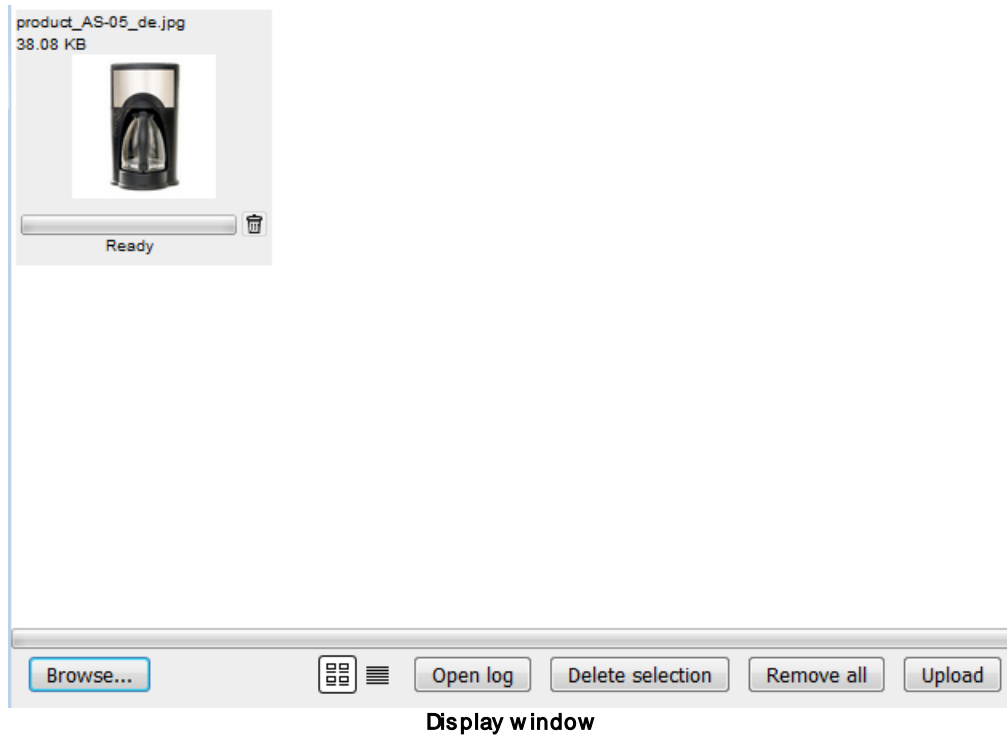
⇒ The file selection window opens.


3. Select a file and click on **Open**.

⇒ The selected file appears in the display window in the light table view with details of its size. Click on  on the right to activate the list view.

Alternatively, you can drag a file directly into the window using drag & drop.

4. Click on **Upload**.



 **Note:** You can also upload several media assets at the same time. To do this, simply select all the media assets to be uploaded in turn and then click on **Upload**.

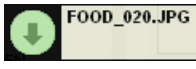
- ⇒ The file upload process begins. You can monitor the progress using the progress bar. As soon as 100% is reached and "Finished" appears in the dialog box, the file upload has been completed successfully. You can click on **Log** to view a log of the upload. The media asset is now in the inbox.

You can display media assets that have just been checked in by clicking on "Inbox" in the navigation tree in the main window. From there, you can [assign them to groups and/or collections using drag & drop](#).^[10]

2.3 Assigning media assets to a group/collection


You only assign media assets to groups and collections using the drag & drop function:


1. Click on "Inbox" in the navigation tree.
 - ⇒ The media assets are displayed in the main window.
2. Select a media asset in the main window (in the [light table](#)^[11] or [list view](#)^[10]).
3. Hold down the left mouse button and drag the media asset over the group or collection you want to assign it to.

⇒ When assigning,  indicates that you can assign the object to the corresponding group or collection.

4. Release the media asset over the group or collection.

⇒ The media asset is now assigned to the corresponding group or collection.

 **Note:** If you are using Product 360 Media Manager in conjunction with Product 360 Desktop as Heiler Enterprise PIM, additional information is available:


- ⇒ The assignments to Product 360 Desktop products or items are extracted from the Product 360 Desktop database via a system interface.
 - ⇒ Both the underlying structure groups and the reference products/items are displayed.
 - ⇒ By default, only three references are displayed. If more exist, you can extend the display by clicking on .
-

 **Note:** You can also [assign access levels](#) ^[24] to the groups.

2.4 Indexing media assets

You index your media assets in the secondary window on the right:

1. In the main window, open a list of the media assets you want to index.
2. Select a media asset.

 **Note:** You can also index multiple media assets by selecting several assets at the same time.

You can use the following areas for indexing in the secondary window on the right:

1. "Technical information": The upper section includes all the technical details for the selected media asset. In the area below, you can index the required assets:

 **Note:** If you selected several assets, "Multi selection" is always specified in this area.

- Enter a name and an agency ID. If you selected several assets, you cannot enter a name because each media asset must have a unique name.
- The rights period specifies the start and end date of the editing authorization. These fields are only displayed if they have been created by the administrator in the [profile](#) ^[53].
- Choose a suitable access level from the available options.
- Select a status.
- In "Status", specify whether the media asset is to be released for processing or locked.





Note: In addition to these two statuses, which you can specify manually, there is a third status, which is assigned automatically: "Archived". This status is assigned to a media asset that has already been archived and is therefore no longer available on the file server.


- Select whether the image is finished or whether it is in progress.
- Select whether or not the image is orderable, convertible, and displayable.
- Select a class from the available options.
- Under "Memo", you can enter a text of your choice.

2. "General information": All the default feature fields are listed here. If the settings in the profile assigned to you allow, property fields with the field type "Long text" can be displayed at positions #101 to #110. Fill in the features for your media assets.



Note: Clicking on  displays the meta data specified in the "Technical information" and "General information" areas in another available display language.

As soon as you have made changes in one or several areas, you can save your entries by clicking on  at the top right of the screen.

Click on  to reset the data to its original status.

You can now use the indexing just carried out to find the new indexed media asset with the [advanced search](#)^[20].





Note: If you have selected the [detail view](#)^[12] for a selected media asset in the main window, you can also see the "Edit" area here. More information can be found in the [Editing media assets](#)^[23] section.

2.5 Searching for media assets



Information: The options for searching for media assets are governed by the settings for the currently active [profile](#)^[53]. The fields available for the search can be configured in the profile.



You search for media assets as follows:

- To display all media assets that are saved in the content and media library, click on  in the menu bar.
- To selectively search for particular media assets, enter the file name, the ID, and the name or any part of the file name, the ID or the name in the input field in the menu bar and click on .



Note: The search is not case-sensitive.

- To search in specific fields and/or using multiple search criteria that are logically linked:

1. Click on  in the menu bar on the right next to .

⇒ The advanced search area is expanded:





2. In the drop-down lists, select

- the field in which you wish to search and
- how the results should relate to the search criteria (exact match, phonetic similarity, etc).

3. Enter the search criteria in the input field on the right.

⇒ As an example, we want to view all media assets that are not assigned to a group.

 **Note:** Depending on whether you are searching in a text field or a numerical field, enter a string or a number here; fields with a logical value can be set using a check box and date values using a convenient calendar. Property fields with the field type "Long text" can only be used for the search with the "contains" operator (i.e. partial field content), as otherwise the unlimited field length would take up too much processing capacity.


4. To link several search criteria together, click on .

⇒ A new row appears:




5. In the input field on the left, select how you want to link the search criteria.

⇒ The drop-down lists for the new search row are selected by an internal system check. Only those fields that have a logical link to the first search row are displayed.


 **Note:** You can link any number of search criteria in this way.

With each subsequent row, you are narrowing down the search results: When there are more than two rows, the first two rows are linked first and applied to the media assets, then the third row is applied to the results, and so on.

6. Clicking on  allows you to delete the last search row.

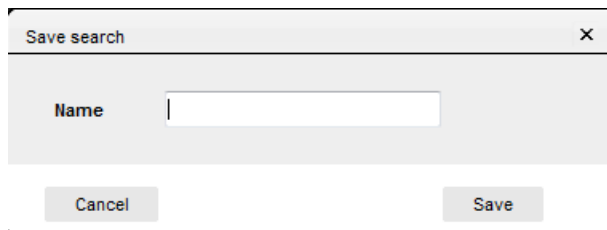
7. Click on  to run your search.

⇒ The media assets found are always displayed in the main window.

 **Note:** The number of search results is displayed in the menu bar.

If you want to use particular search queries frequently, you can save them by clicking on .

1. Enter a name for your search query and click on **Save**.




A dialog box titled "Save search" with a close button (X) in the top right corner. Inside the dialog, there is a label "Name" followed by a text input field. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.


Save search query









⇒ You can now find your search query in the group tree under "Search queries".

2. The next time you want to execute your search query, simply navigate to this and click on the search query.


⇒ Your search query is executed.

 **Note:** The search result display depends on the underlying [profile](#)⁵³¹ and is applied for each search type. It can be identified by the active symbol in the menu bar, but can be reselected at any time.

 **Note:** The number of search results per page can be specified directly.

Page: 1 of 25  615 Hits      Hits per page: 25  

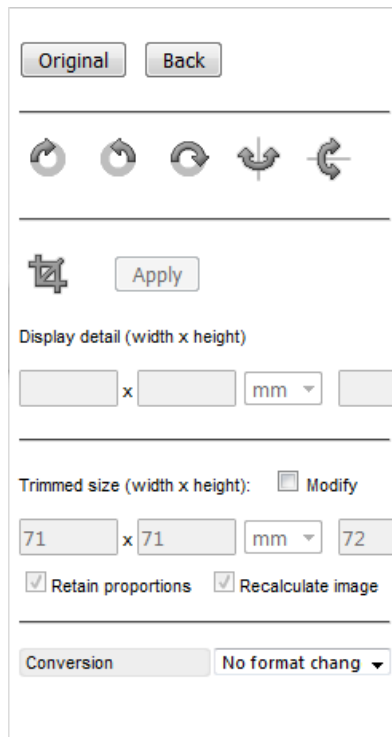
Number of search results

 **Information:** The ability to make settings for the search results can be configured in the user or customer profiles in the administration area.

2.6 Editing media assets

You edit a media asset as follows:




1. Open the [detail view](#).
2. Switch to the "Edit" area in the secondary window on the right.






The screenshot shows the 'Edit media asset' panel. At the top, there are 'Original' and 'Back' buttons. Below them is a row of five rotation icons: 90° clockwise, 90° counter-clockwise, 180°, and two others. Below the rotation icons is a crop icon and an 'Apply' button. Underneath is a section for 'Display detail (width x height)' with input fields for width and height, a unit dropdown set to 'mm', and a 'x' separator. Below this is a 'Trimmed size (width x height)' section with a 'Modify' checkbox, input fields for width (71) and height (71), a unit dropdown set to 'mm', and a '72' field. There are also checkboxes for 'Retain proportions' and 'Recalculate image'. At the bottom, there is a 'Conversion' button and a 'No format change' dropdown.


Edit media asset

You can do the following in the "Edit" area:

- You can rotate the object by 90° to the right or left and by 180°. To do this, click on ,  or .


- You can reflect the object horizontally or vertically. To do this, click on  or .
- To create a clipping:



1. Click on .
2. Switch to the main window, hold down the left mouse button and drag the mouse until the display detail is of the required size.
3. Position the clipping in the image container with the left mouse key.
4. Drag the mouse to increase or reduce the size of the clipping.

 **Note:** Alternatively, you can specify the size of the display detail in the input fields in "Display detail".

5. Click on **Apply**.

- Specify whether you want the trimmed size to be different from the size entered. To do this, select the "Change" option and enter the required values.
- Decide whether you want the format to be converted.

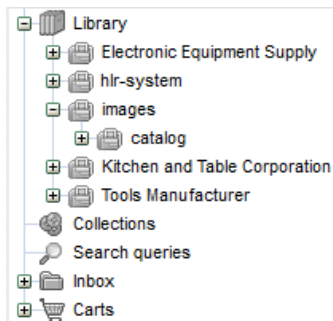
 **Note:** To restore the clipping to its original state, click on **Original**.

When you have finished editing the selected media asset, click on  in the menu bar to place it in a cart or click on  in the menu bar to upload it as a new media asset to the content and media library.

2.7 Managing hierarchical groups

To give a better overview, media assets can be managed hierarchically in groups.

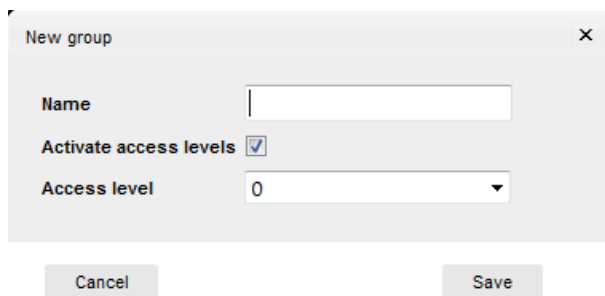
You can also assign an access level to each group. These access levels allow the visibility of the relevant group to be controlled.



Hierarchical groups

You create a new hierarchical group as follows:

1. Select the group under which you want to create a new group in the navigation tree.
2. Select **New group** from the pop-up menu.
 - ⇒ The "New group" dialog box opens.
3. Enter a name.
4. Select the access level you want to assign to the group. If you do not want to assign an access level to the group, clear the check mark in the "Activate access levels" check box.



Creating a new group

5. Click on **Save**.

⇒ The "Delete group" dialog box opens.

You delete a group as follows:

1. Select the group you want to delete in the navigation tree.
2. Select **Delete group** from the pop-up menu for the group.

⇒ The "Delete group" dialog box opens.

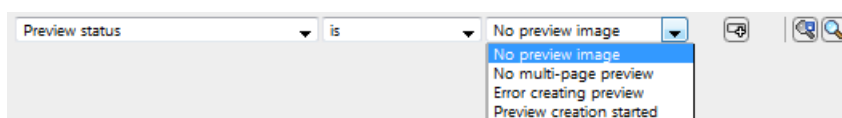
3. Click on **Yes**.

⇒ The group has been deleted.

2.8 Incorrect previews


Preview images can have different statuses and are assigned a corresponding flag in the latest version of Product 360 Media Manager. This enables you to search selectively for them. This is done using the [advanced search function](#) ^[21].

⇒ **Note:** The prerequisite for using the advanced search option is creation of a system-based workflow that flags the preview status.







Search by preview status

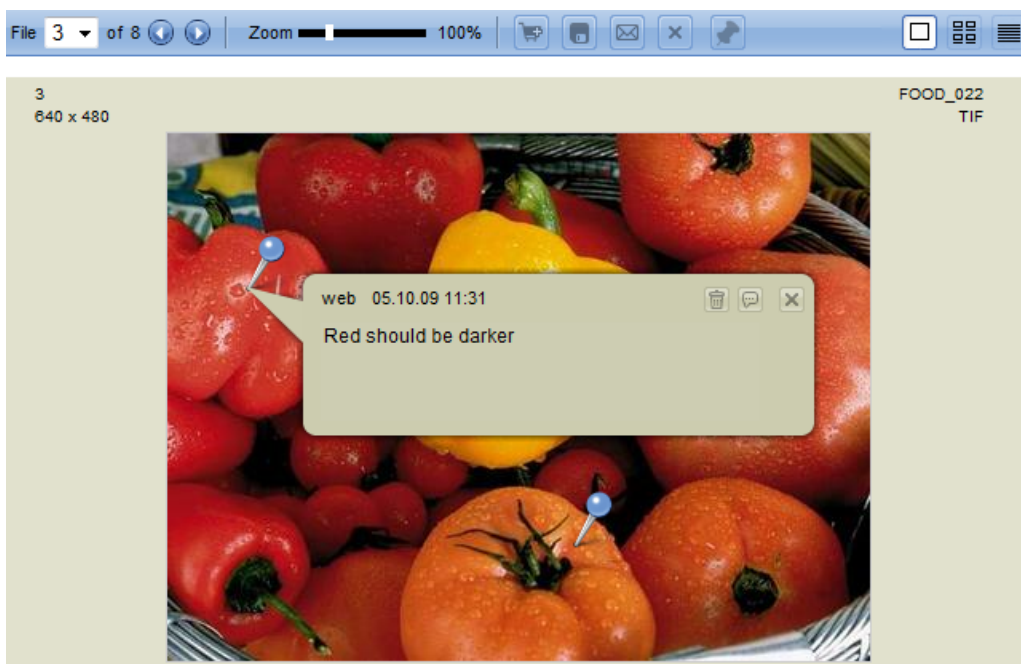
You can select particular objects in the search results and thus carry out a selective update. If no objects are selected, all objects found are re-imported. If there are more than 100 objects, a precautionary dialog box is displayed, in which you confirm the operation. A system message tells you how many objects are ready for updating or to be ignored as they are either locked or already archived.

⇒ **Note:** A preview is re-imported using  and the function is only active if the user has the rights for editing images.

2.9 Creating comments


You can enter comments for a media asset in the [detail view](#) ¹² and reply to them:

1. Open the detail view.
2. Click on  to activate the comment function.
 - ⇒ You can now create comments or view existing comments.
3. Click on the image at the point where you wish to add the comment.
 - ⇒ This point is marked by a pin and the input box for comments is opened.
4. Enter the comment.
5. Save your comment using .
6. Close the comment using .
- ⇒ The comment is displayed as a pin in the image. You can change the position of the pin later, by moving it with the mouse.
7. Exit comment mode by clicking on .



Comments

Replying to comments



1. Click on  to activate the comment function.
2. Open the corresponding comment by clicking on the pin.
3. Click on  to create a reply.

4. Save the reply using .



Note: Comments with replies cannot be moved.

Deleting comments

1. Click on  to activate the comment function.
2. Open the corresponding comment by clicking on the pin.
3. Click on  to delete the comment.



Note: You can only delete your own comments. If there are replies to a comment, you must first delete the replies, before you can delete the actual comment itself.

2.10 Cart

The cart enables you to collect media assets in a kind of clipboard. In addition to the pure clipboard functions, however, the cart enables you to further process the media assets it contains and make them available.

The cart is located below the main window. The "New" cart is displayed in there, provided that you have not already opened an existing cart. A name is generated automatically for the cart as soon as you place media assets in the "New" cart.



Note: You can rename the cart in the [navigation tree](#)^[10] using the [pop-up menu](#).^[27]

2.10.1 Cart functions

The following pop-up menu is available under "Carts" in the navigation tree:

"Carts" primary node:

- Refresh the tree displayed (**Refresh**).
- Create a private folder if you want to create a folder in which you can create carts that only you can view (**New private folder**).
- Create a new cart directly under "Carts" (**New cart**).



Note: In the latter two options, you are required to specify a name for the folder or the cart. Enter a name and click on **Save**.

The new folder or cart is embedded in the corresponding hierarchy level under "Carts". If this is not the case, select **Refresh**.

Folders below "Carts":

- Create a new private folder (**New private folder**).
- Rename a folder (**Rename folder**).
- Delete a new private folder (**Delete folder**).
- Create a new cart in the folder (**New cart**).



Note: If you delete a folder, which in turn has subfolders, these are also deleted automatically. If the folder to be deleted contains carts, after deleting you will find these directly under "Carts" once you have selected **Refresh**.

Carts

- Remove a cart from a folder to which it has been assigned (**Remove cart from folder**).
- Delete a cart (**Delete cart**).
- Create a copy of a cart (**Copy cart**). The copy of the cart is created at the same level of the hierarchy. When copying, give the new cart a name.
- Rename a cart (**Rename cart**).

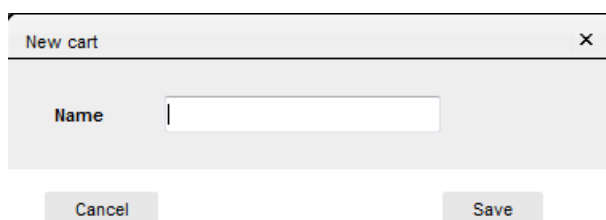


Note: You can only rename carts that have not yet been released.

2.10.2 Creating a cart

You create a new cart and assemble it as follows:

1. In the [navigation tree](#),^[10] select "Carts" or a private folder you have created under "Carts".
2. In the [pop-up menu](#),^[27] select **New cart**.

**Create new cart**

3. Enter a description for your cart.
4. Click on **Save**.

⇒ The cart is created under "Carts" or the selected private folder in the navigation tree.



Note: To store the new cart in a private folder, first select **New private folder** and in this folder select **New cart**.

Alternatively, you can move the new cart created [to a private folder later using drag and drop](#).

10

5. Click on the new cart.

⇒ The new (still empty) cart opens below the main window.



Tip: You can create a new cart with an automatically generated name directly by clicking on



in the cart menu bar.


2.10.3 Adding media assets to the cart

The following options are available for assembling a cart:

1. Click on the cart in the navigation tree to open it below the main window.

2. Navigate to a group, a collection or to the [inbox](#) 17.

⇒ The images contained in this group or collection or in the inbox are displayed in the main window.

3. Place the selected media assets in the cart. Both in the [light table](#) 11 and in the [list view](#) 10 you can add an individual media asset to the cart by clicking on .

Alternatively, you can place an individual media asset in the cart using drag and drop:


1. Click on the corresponding media asset.



Note: In the list view, you have to click in the "File name", "ID" or "Name" column.

2. Hold down the left mouse button.


3. Drag the media asset to the open cart below the main window.

⇒ You will see a green arrow:  **FOOD_020.JPG**

4. Release the media asset over the cart.


⇒ The media asset is now in the cart.




Note: To place all the media assets from a group or collection or from the inbox in the cart, click on  in the menu bar of the list view.

To edit a media asset before placing it in the cart, proceed as follows:

1. In the main window, select the media asset you wish to edit.



2. Open the [detail view](#)^[12] for the media asset.
3. Open the "Edit" area in the secondary window on the right.
4. Make your changes as described in [Editing media assets](#)^[23].
5. Place the edited media asset in the cart by clicking on  in the menu bar.



Click on  to remove the media asset from the cart.




Note: As long as a cart that is already assembled has not yet been released, you can still place new media assets in it. To do this, navigate in the tree to the corresponding cart and place new objects in it as described above.



2.10.4 Editing a cart

Click on  in the cart or  in the menu bar to switch between the [light table view](#)^[11] and the [list view](#)^[10].

As long as the cart has not yet been released, you can click on  in the menu bar to release it or click on  to delete it.

If the cart has already been released, you can send a link to this cart by e-mail by clicking on . Clicking on the link takes the recipient directly to the corresponding cart.





The following options are available in both light table view and the list view:

- Click on  to download media assets from a cart that has already been released to your computer.
- Click on  to remove media assets from a cart that has not yet been released.


In the list view only:

- You can see the file name and the ID of the individual media assets of the selected cart.
- In the "Changes" column you can see whether a [media asset has been edited](#)^[23] before it was placed in the cart.
- You can specify conversions and derivatives to be carried out in the column of the same name, as long as the cart has not yet been released. If the cart has already been released, this column shows you whether a conversion was specified or not.

Cart: 2014-12-04 16:02:09 Page 1 of 1

File name	ID	Changes	Conversions
 50051_3.jpg	D1200010722210	No	No format change
 50053_18.jpg	D1200010722211	No	No format change
 50051_2.jpg	D1200010722209	No	No format change
 50450_29.jpg	D1200010722214	No	<div> No format change (D)-JPEG 70x70 JPEG 70x70 Convert 2.JPG Convert to BMP OSX 5.6 5.7 Pipeline (BMP) </div>

Possible conversions







 **Note:** When a cart is released, the conversions defined in the list view are processed automatically.

In order for the conversion to be successful, the corresponding conversions or pipelines for each data type must first be configured in the Pipeline module.

2.10.5 Overview of carts

Click on "Carts" in the navigation tree to display a list of all the carts that have already been created in the main window.





Carts Page 1 of 1

Name	Cart no.	Created	User	Number of elements		Released	Finished
2015-08-20 05:16:20	D120001-15-000000003	Aug 20, 2015	pim7	1	  	No	No
2015-08-20 00:45:45	D120001-15-000000002	Aug 20, 2015	pim7	1	  	Yes	Yes

Overview of all available carts

In addition to the name and ID of the cart, the overview shows you:

- When the cart was created ("Created")
- Who created the cart ("User")
- How many items a cart contains ("Number of items")
- Whether the cart has been released ("Release")
- Whether the cart has already been processed ("Finished")

If the cart has already been released, you can click on  to send a link to the cart by e-mail. As long as the cart has not yet been released, click on  to release it or  to delete it. If the cart has been released but is still being processed, you can update it by clicking on .

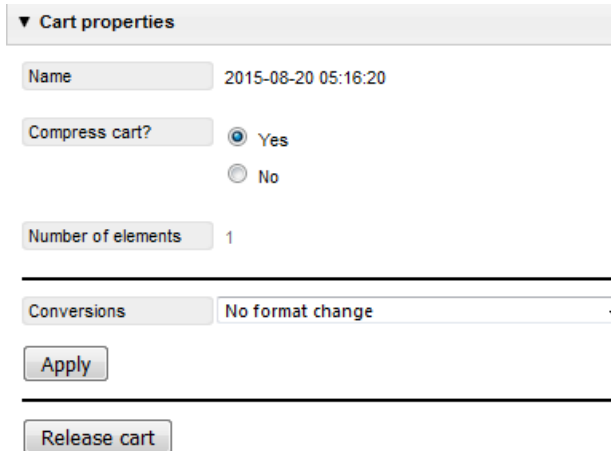
There are two ways in which you can select a cart:

- Click on the relevant cart in the overview list in the main window.
- Select the relevant cart in the navigation tree. The number of items it contains is displayed.

- ⇒ The cart opens below the main window. The [cart details](#) ³²⁾ are displayed in the secondary window on the right.

2.10.6 Cart settings

The secondary window on the right displays the settings for the selected cart under "Cart settings".



▼ Cart properties

Name 2015-08-20 05:16:20

Compress cart? ☒ Yes ☐ No

Number of elements 1

Conversions No format change ▼

Apply

Release cart

Cart settings

You can change the information entered here to suit your requirements as long as the cart has not yet been released:

1. "Designation": Click in the text field to rename the cart.
2. "Compress cart": Specify whether the files in the cart are to be packed and compressed.
3. "Conversions": Define a conversion.
4. Click on **Apply** to save your entries.
5. If the cart has not yet been released, a button to do this is provided.

3 Projects

A project allows job-based editing of the project components it contains ("digital job bag"). The project components can either be already included in the project, created or media assets can be selected from the Medias database. Depending on the settings, project-specific working times and material costs can also be entered and assigned to cost centers. The project overview provides you with information about all current projects, allowing you to identify where there is a risk of missing a deadline or running over budget in good time.

To access project management, open the "Projects" area in the bottom left.

3.1 Navigation tree functions

The following default nodes are displayed in the navigation tree:

Current project or <Name of project>:

Here, you can view the current project and its components, once you have loaded a project. The pop-up menu provides you with the following options:

- Create a new folder to group the components (**New folder**).
- Rename a folder (**Rename folder**).
- Delete a folder and its contents (**Delete folder**).

Directory

This contains all the projects that are currently being edited. The pop-up menu provides you with the following options:

- Create a new folder (**New folder**).
- Rename a folder (**Rename folder**).
- Delete a folder and its contents (**Delete folder**).
- Create a new project (**New project**).



My projects

Here, you will find projects you have created yourself or moved to this area using drag and drop. The projects are managed using the "Open projects" and "Completed projects" nodes.

- Remove a project from "My projects" (**Remove**).




3.2 Searching for projects

The "Projects" area provides you with convenient search options:

1. First use the drop-down list to select the status of the project.
2. To display all projects, click on  in the menu bar.
3. To perform a targeted search for particular projects, enter the search term in the input box and click on .
4. To search in particular fields and/or for multiple logically linked search criteria, [you can use the advanced search.](#)^[20]

➡ All the results are displayed in an overview list in the main window.

In the "Date" column, the color markings show projects that are imminently due for completion, if a deadline has been entered for the projects.

Page 1 of 1									
End of project	Name	Project number	Start of project	Created	Status	Status date	Status	Finished	
Aug 19, 2015	test projekt	1200088	Aug 13, 2015	Aug 20, 2015	"No status defined"		Free	No	  
Aug 28, 2015	catalog	1200090	Aug 20, 2015	Aug 20, 2015	"No status defined"		Free	No	

Project overview

3.3 Project properties

In the secondary window, you can edit the properties of the project or a project component, depending on the object selected in the main window. Various areas are available, in which you can either edit or just view the fields.

- You can view all the information about a project, e.g., description, job number, customer, deadline, etc., under "Project details". You can also [change the status of a project](#)^[39] here.
- You can edit definable additional fields under "Extra fields for project".
- You can view and delete assignments for the project under "Project assignments".
- If you have selected a project component, you can see all the information about the component, e.g., file name, size, status, etc., under "Component details. You can also [change the status of a component](#)^[39] here.

3.4 Creating a new project

You create a new project as follows:

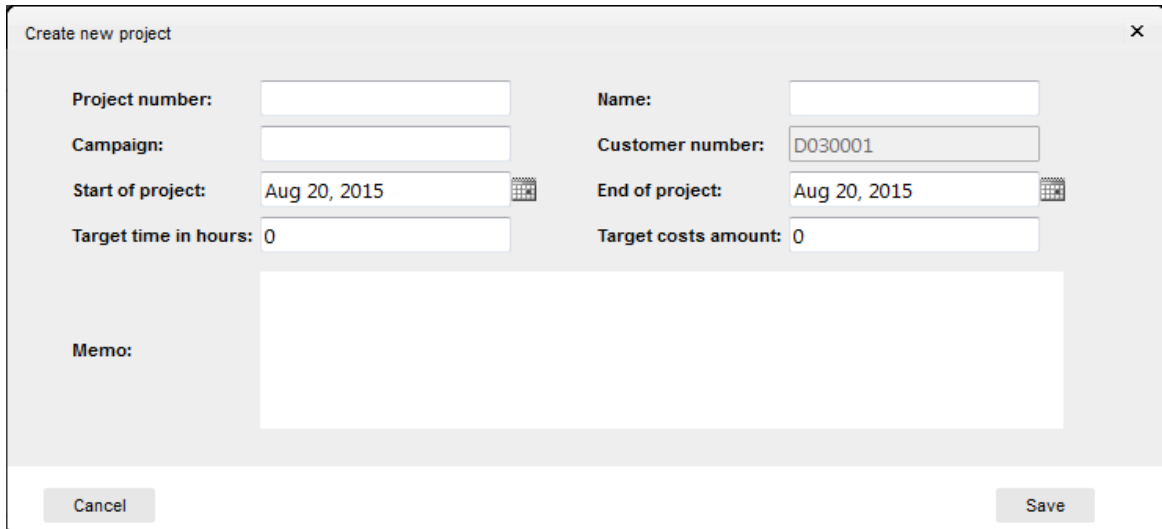
1. In the [project overview list](#)^[34], click on to create a new project at the top level.

Or:

2. Create a new folder below "Directory".

3. Select **New project** in the pop-up menu for the folder.

⇒ The "Create new project" dialog box opens.



Create new project

4. Enter at least the project number and the description of the new project.

5. If necessary, select a different template under "Group template".


6. Click on **Save**.

⇒ The project is created.

7. In the secondary window on the right, you can specify details of the [project properties](#)^[34] or [change the status](#)^[39] under "Project details" or Extra fields for projects".

You can now [upload files to the project](#)^[36] or [add or link media assets](#)^[35]. Projects can be sorted into folders using drag and drop. A project's assignments can be viewed in the secondary window and deleted if required.



3.4.1 Adding media assets

1. Click on .


⇒ The media asset selection window opens.

2. Find a media asset using the keyword search or navigate using the folders on the left.

3. Select a media asset. You have two options for adding the media asset:


- Copy: Click on  to copy the selected media asset to the project.
- Link: Click on  to link the selected media asset to the project, i.e. you create a link to the actual media asset under Media Assets.

4. Copy or link the media asset.


- ⇒ The media asset is displayed in the component list. Linked media assets are indicated by  in the left-hand column. Not all editing options are available for these media assets.

5. You can move the components into a subfolder using drag and drop.



Tip: You can select multiple media assets by holding down the CTRL key while clicking on them. You can use  to select all media assets displayed.

3.4.2 Adding files

1. Click on .

⇒ The window for [uploading media assets](#)  opens:

2. Select a file.

3. Click on **Upload**.


⇒ The file upload process begins. You can monitor the progress using the progress bar.

When the upload is complete, the media assets can be found in the component list in the project.

4. You can move the components into a subfolder using drag and drop.

3.5 Editing projects
















To edit a project, you need to load it as the current project, if it is not already the current project.

1. In the project overview list, click on  after the project.




⇒ If this project has a memo, the memo is automatically displayed.

2. Click on **OK** to exit the memo.




⇒ The list of project components is displayed in the main window.








Page 1 of 1								
	File name	Last edited on	File size	Status				
	MUSIC070.JPG	Aug 20, 2015 03:27	18.841 KB	"No status defined"				
	MUSIC073.JPG	Aug 20, 2015 03:27	18.131 KB	"No status defined"				
	MUSIC076.JPG	Aug 20, 2015 03:27	17.267 KB	"No status defined"				

Project component overview list




Click on  or  to switch between the list view and the light table view. To display the detail view for a selected component, select the relevant component and click on .

The menu bar in the main window provides you with the following options:


- You can scroll by clicking on  or .
- : Upload a new component to the current folder

-  : Add or link a media asset as a component
-  : Select all components.
-  : Add all components to the cart
-  : Enter times for the overall job or for one component
-  : Add material consumption to the project
-  : Updates the screen display
-  : [updates](#) ^[41] the project settings



The table itself contains additional editing options. The most important of these are:

-  : Upload component to a folder for editing
-  : Check out component and upload to a folder for editing
-  : Check component back in after editing.

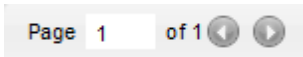




3.5.1 Opening the detail view for a component




1. [Open the project.](#) ^[36]
2. Select the desired component.
3. Click on  in the menu bar in the main window.

Or

4. Click on  after the component.
 The detail view for the component is opened in the main window.





The following functions are available in the detail view:

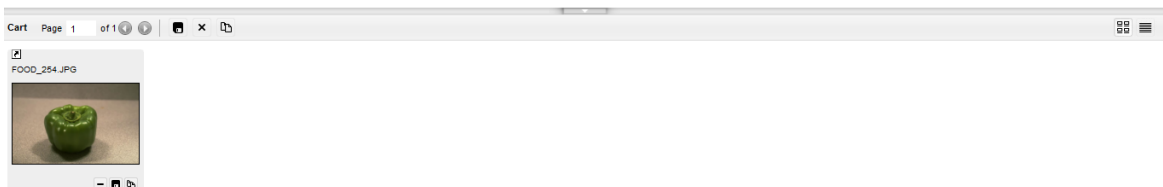
- Select the component from the drop-down list  or click on  or  to view all the components from the group consecutively in the detail view.
- Use the slider above to change the size of the preview.
- Click on  to download the component to your computer.
- Click on  to add times to the component.

- Click on  to add material to the project.
- Click on  to create a [comment](#)^[26].
- The detail view also shows the [times](#)^[40] and [materials](#)^[41]. These windows are automatically opened below the [cart](#)^[38].
- The "Component details" are displayed in the secondary window. Here, you have the option of [changing the status of a component](#)^[39] or setting a Locked flag.
- By clicking  you can share the corresponding object. A click on the link sent leads even unregistered users to the selected object. The user has the option to download the object. It is possible to share up to one hundred objects



3.5.2 Cart in projects

You can use the cart in projects to transfer a project component to another project.





Page: 1 of 1					
	File name	Last edited on	File size	Status	
	FOOD_022.TIF	Sep 12, 2003 00:00	907.5 KB	"No status defined"	
	FOOD_254.JPG	Oct 27, 1997 16:44	30.119 KB	"No status defined"	




Cart in projects

1. Click on  to add the relevant component to the cart.
2. [Open the project or the subfolder for the project](#)^[36] to which you want to add the component.
3. Click on  for the component in the cart.
 - ➡ The component is added to the project.



You can also use the following cart functions:

- : remove a single component from the cart
- : download a single component
- : download all files in the cart as a ZIP archive
- : empty the cart





-  : add all components in the cart to the current project

3.5.3 Editing components

You can edit a component by checking it out and downloading it and then checking it in again after editing. You cannot check out linked media assets.

1. Click on .
2. In the browser dialog box, enter the location where you want to save the component.
 - ⇒ The component is checked out.
3. Edit the component.
4. When you have finished editing, click on  to check in the component.
 - ⇒ The [upload dialog box](#)¹⁷ opens. This only allows you to select a file with the appropriate name.
5. Select the edited file.
6. Click on **Upload** to upload the file.
 - ⇒ The component is checked in again.

In addition, you can also perform the following actions with a component:

-  : Download the component without checking it out.
-  : Place the component in the cart.
-  : Delete the component from the project.
-  : Copy component to "Media assets" and replace with link.

3.5.4 Change status



You can change the status of an individual component or a project:

1. Select a project or a component.
2. In the secondary window, click on **Change status** under "Project details" or "Component details".
 - ⇒ The "Change status" dialog box opens.
3. For a component:
 - Select the cost center.
 - You can then select the activity.

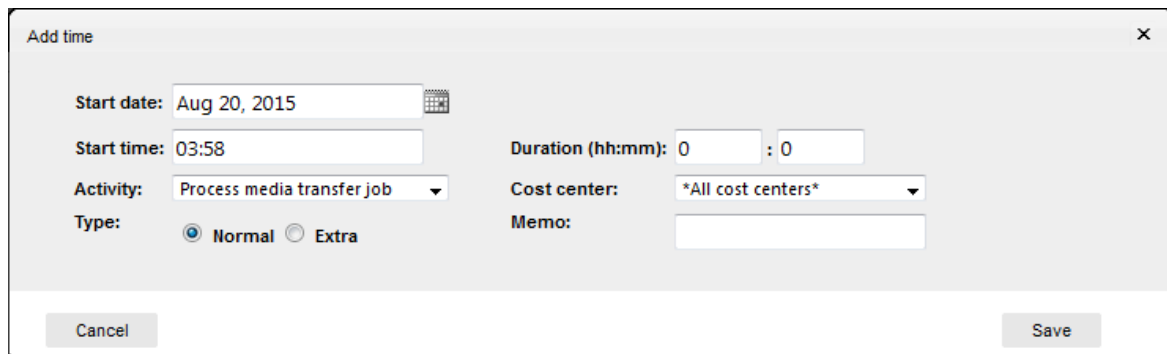
- Select the status.
4. For a project, only select the status.
 5. Click on **Save**.

3.5.5 Entering time

You can enter times for individual components or for the entire project.


1. To enter times for the entire project, click on  in the menu in the main window.
2. To enter times for an individual component, click on  after the relevant component in the component list.

⇒ The window for entering times opens:



Adding times


3. Make the following entries:
 - Start date: Date on which the activity began.
 - Start time: Time when the activity began.
 - Duration: Time required for the activity in hours and minutes.
 - Activity: Select the activity carried out from the list.
 - Cost center: Select the cost center.
 - Type: Enter the type of activity; "Normal" is selected by default.
 - Memo: If you select the type "Extra", you can store a note here.
 4. Click on **Save**.
- ⇒ The times are displayed below the cart in the main screen.

To delete a time entered, click on  in the list.


3.5.6 Entering material

You only enter the material for a project, not for the individual components.

1. Load the project for which you want to enter material as the current project.

2. Click on .

⇒ The window for entering material opens.



Adding material

3. Select the material.

4. Enter the quantity.

5. Select the cost center.


6. Click on **Save**.

⇒ The material is displayed below the cart in the main screen.

To delete materials entered, click on  in the list.

3.5.7 Synchronizing projects


Projects undergo constant adjustments and, as a result, must be flexible to handle. Changed customer preferences, unachievable delivery dates or additional corrections must be incorporated into the project promptly, making updates essential. We refer to this process as **synchronization**, i.e. synchronizing all changes from the database into a project.

The process can be initiated either in the [Project overview](#) ^[34] table itself, or using the menu bar in the [detail view](#) ^[36]. To do this, click on . The function cannot be used on locked or archived projects. You should consider the fact that, depending on the number of changes, synchronization can take several minutes. Synchronization always involves a complete project, not an individual directory.

After synchronization, the changes can be viewed on screen using .

3.6 Completing projects

You complete a project as follows:

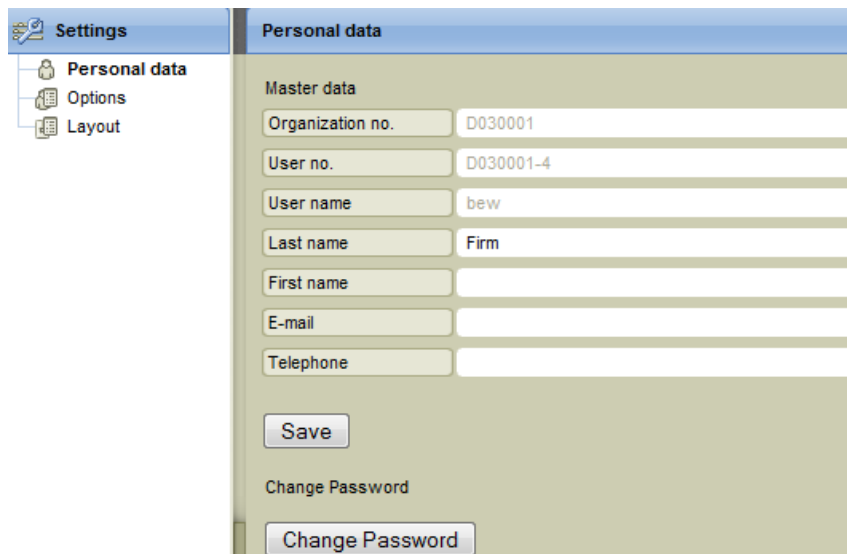
1. Select the project you want to complete.
2. In the secondary window, under "Project details", select the "Processing complete" option.
3. Save this change by clicking on  in the top right.

⇒ The project is moved to the "Completed projects" node in the navigation tree.

To open a completed project again for further work, deselect the "Processing complete" option under "Project details" in the secondary window. The project is then moved to the "Open projects" node in the navigation tree.

4 Settings

You can view and, if necessary, modify your master data and profiles in the "Settings" area.



Settings

- You can view your master data under "Personal data". You can edit some of this data here. If you have the relevant authorization, you can also change your password here.
- Under "Options" you can edit the [profile settings](#),⁵⁰ e.g. the number of rows displayed and the sort order in the cart.
- Under "Layout", you can edit the settings for the appearance of the Web interface.

Changing the password

1. Click on "Personal data" in the navigation tree.
2. Click on **Change password**.
 - ⇒ The dialog box for changing the password opens.
3. Enter your current password.
4. Enter your new password.
5. Confirm the new password by entering it a second time.
6. Click on **Save**.
 - ⇒ The password is changed.

5 Administration



Note: The Administration module can be used in different ways depending on whether you are also using the native application. This enables you to access uses and user groups in the Web application if they were created there. This is particularly useful as you can create a standard range of users: with all the different roles and authorizations that can normally be found in media agencies.

Basic information

The Administration module is used to manage every user's authorizations, but assigning the user to a user group and an organization. Although you can create both groups and organizations hierarchically, there are differences that we will explain.

With a **group** you create a construct, made up of roles, jobs and job types that corresponds to the situation in your company. A role represents the minimum qualification necessary to perform an activity, and also describes the competences transferred to the holder of that role. A job, meanwhile, refers to a collection of tasks that a person is engaged in continuously throughout their working time. Job types group together jobs with the same competences. Authorizations within a group are passed on to every level in the hierarchy. The top level thus has the fewest authorizations and the lowest level the most.

Organizations are administrative units in which the authorizations are reduced as you move down. In larger companies, these could be branches, while smaller companies would use them for departments or business units. In this case, you should start with job types.

The authorization to perform particular actions (user group) and to access defined objects (organization) results in a network of relationships, within which you need to position each user according to their role.

Web-specific

When you log on as an administrator, only the "Administration" area is available in the navigation bar on the left-hand side. You perform the following tasks in the "Administration" area:

- Manage organizations, user groups and users.
- Create profiles based on a template and edit these.
- Assign existing profiles to users and organizations.
- Manage layout templates and assign these to users and organizations.

5.1 Navigation tree functions

The pop-up menu provides you with the following options depending on the entries you make:

Organizations

- Create [new organizations](#) ^[45] (**Create organization**).
- Rename an organization (**Rename organization**).
- [Create users](#) ^[48] which are assigned to the selected organization (**Create user**).
- Delete users (**Delete user**).

User groups

- Here, you can remove users from the [user group](#) ^[50] (**Remove user**).

Profile templates

- Create a [new profile template](#) ^[50] (**Create profile template**).
- You can delete a profile template for a selected profile (**Delete profile template**).

Layout templates

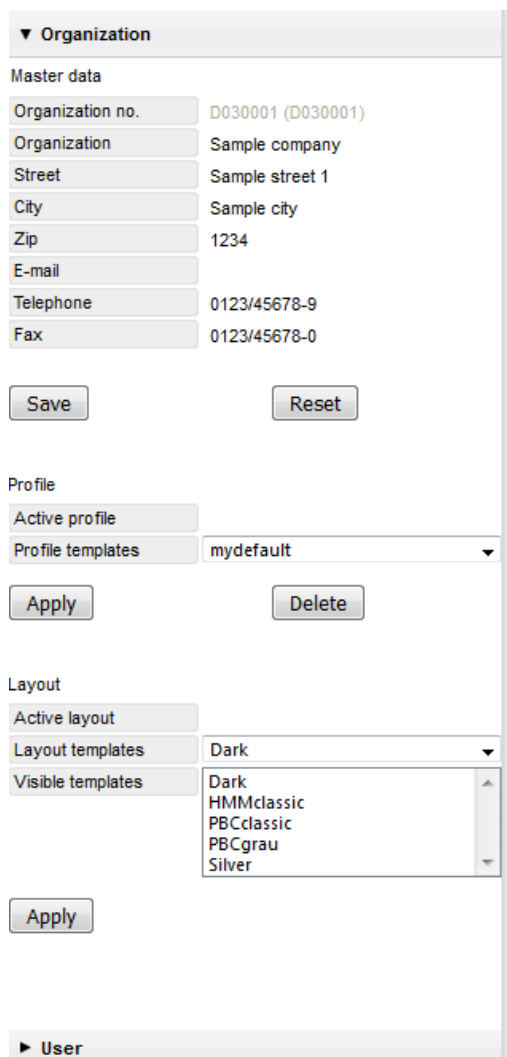
- Create a [new layout template](#) ^[56] (**Create layout template**).
- You can delete a selected layout template (**Delete layout template**).

5.2 Managing organizations

Organizations are administration units that are used to define the external appearance of a company. Because it is possible for organizations to contain any number of hierarchical levels, you can map your company's topology in great detail. Depending on the size of the company, organizations could be branches, individual business units or simply different departments.

You create a new organization as follows:

1. In the navigation tree, select **Create organization** in the "Organizations" pop-up menu.
2. Enter a name and an organization number.
3. Click on **Save**.
 - ⇒ The new organization is displayed in the navigation tree.
4. Click on the new organization.
 - ⇒ The blank list of users in this organization is displayed in the main window.
5. Enter the additional organization data, such as street or e-mail address in "Master data" in the secondary window on the right.
6. Click on **Save**.



▼ Organization

Master data

Organization no.	D030001 (D030001)
Organization	Sample company
Street	Sample street 1
City	Sample city
Zip	1234
E-mail	
Telephone	0123/45678-9
Fax	0123/45678-0

Profile

Active profile	
Profile templates	mydefault


Layout

Active layout	
Layout templates	Dark
Visible templates	Dark HMMclassic PBCclassic PBCgrau Silver

► User


Organization data

- Assign a profile to the organization under "Profile".
- Click on **Apply**.
- Under "Layout", use the drop-down list to assign a layout template to the organization.
- Click on **Apply**.

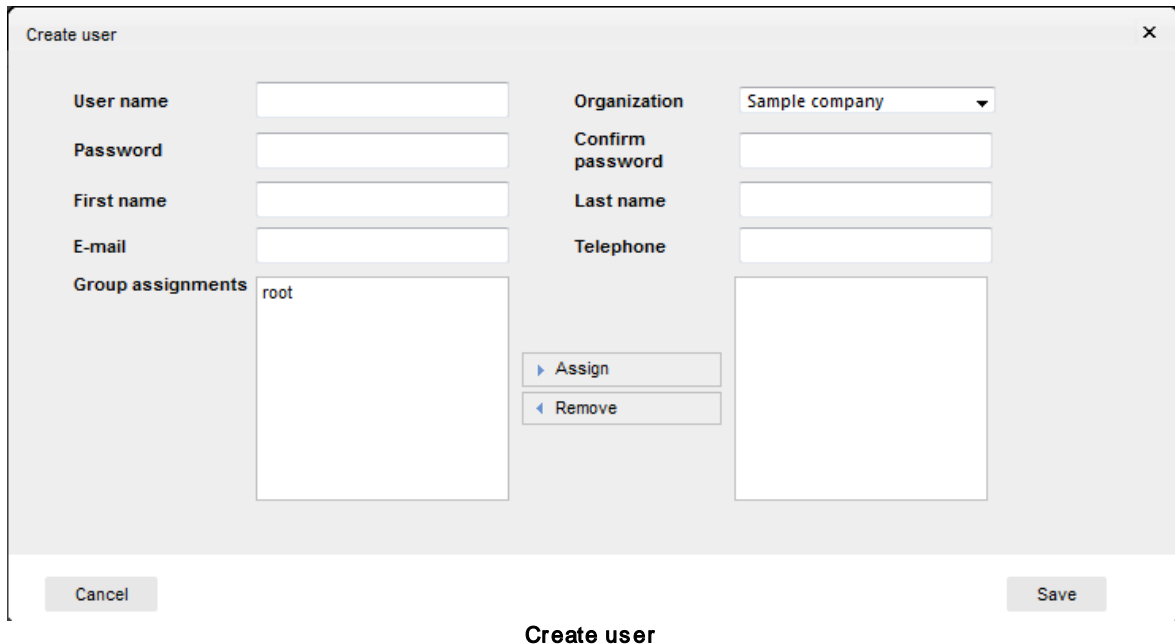
 **Note:** If the tree directory for an organization contains 50 entries or more, they are displayed in alphabetical groups. The grouping is based on the initial letters of the organizations. **They should not be confused with normal user groups.**

5.3 Creating users

You have two options for creating a user:

- Use the pop-up menu for an organization in the navigation tree, or
- Click on  in the table overview.

The following dialog box is displayed in both cases:



The 'Create user' dialog box contains the following fields and controls:

- User name:** Text input field.
- Password:** Text input field.
- First name:** Text input field.
- E-mail:** Text input field.
- Group assignments:** List box containing 'root'.
- Organization:** Dropdown menu showing 'Sample company'.
- Confirm password:** Text input field.
- Last name:** Text input field.
- Telephone:** Text input field.
- Buttons:** 'Assign' (with right arrow), 'Remove' (with left arrow), 'Cancel', and 'Save'.

1. Complete the fields with your information.



Note: Only the "User name" and "Password" fields are mandatory entries. However, all the other information will make it much easier for you to manage users.

2. Correct the organization if you have activated the dialog box using the icon.

3. Assign a user group to the user.

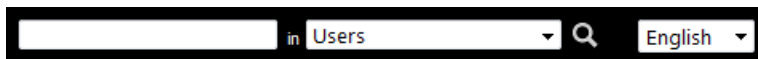
⇒ Select the group from the left list box (*Available user groups*) and use **Assign** to copy it to the right box (*Assigned user groups*). To undo an assignment, select the entry in the right list box and click on **Remove**.

4. Click on **Save**.

5.4 Searching for users

To find an existing user, as an alternative to selecting from the user list for the organization, you can use a search field. To do this:


1. Enter the name in the search line.



A search bar with a text input field containing 'web', a dropdown menu set to 'Users', a magnifying glass icon, and a language dropdown set to 'English'.

User search line

2. You can search by first or surname, as well as by user name or e-mail address. Parts of words are also permitted.

3. Click on .

⇒ The search result is displayed in a table.



User name	User no.	Organization	First name	Last name	E-mail	Locked
web	D030001-2	Sample company		Sample company		No

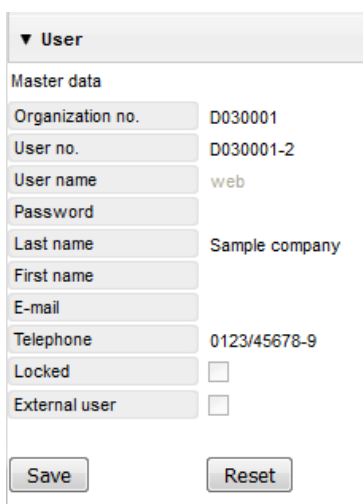
Search result

You can now [adapt](#) ⁴⁸ the user data as required in the associated secondary window.

5.5 Managing users

You edit an existing user as follows:

1. Select the user or user list for the organization or the user group in the navigation tree, or [search](#) ⁴⁷ using the search line.
 - ⇒ The user is displayed in the list of users in the navigation tree and in the main window.
2. Select the user in the main window.
 - ⇒ The "Users" area opens in the right secondary window.
3. Data about the user, e.g. surname or e-mail address, is displayed under "Master data". The "External user field is only used to display whether the user is managed using an external directory service (LDAP).
4. Select **Save** to save your changes, or **Reset** to discard unsaved changes.



A form titled 'User' with a 'Master data' section. It contains input fields for Organization no. (D030001), User no. (D030001-2), User name (web), Password, Last name (Sample company), First name, E-mail, Telephone (0123/45678-9), Locked (checkbox), and External user (checkbox). At the bottom are 'Save' and 'Reset' buttons.

User master data

5. Under "Profile", use the "Profile templates" drop-down list to assign a profile to the user.

6. Click on **Apply**.

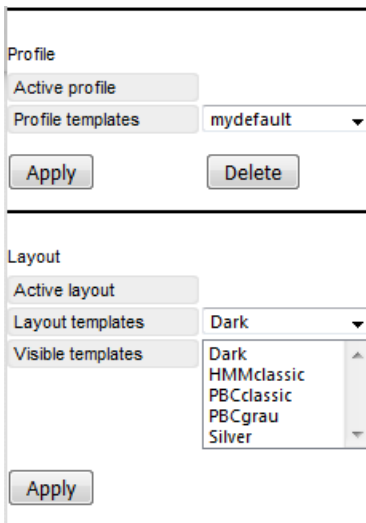
⇒ Your selection is displayed in the "Active profile" field.

7. Under "Layout", use the "Layout templates" drop-down list to assign a layout template to the user.

8. If necessary, use the "Visible templates" field to set which layout templates are displayed for selection by the user by selecting them while holding down the CTRL key.

9. Click on **Apply**.

⇒ Your selection is displayed in the "Active layout" field.

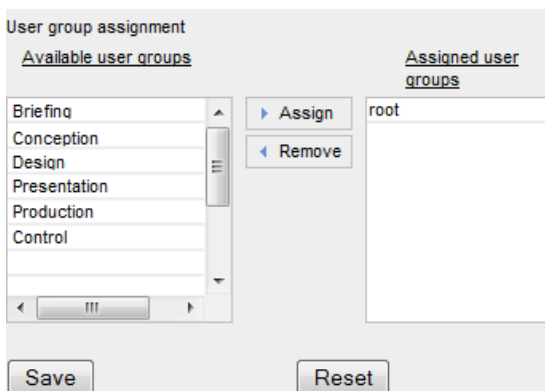


User profile and layout

10. Assign a user group to the user under "User group assignment".

11. Select the fields from the left list box (**Available user groups**) and use **Assign** to copy them to the right box (**Assigned user groups**). To undo an assignment, select the entry in the right list box and click on **Remove**.

12. Click on **Save**.



User group



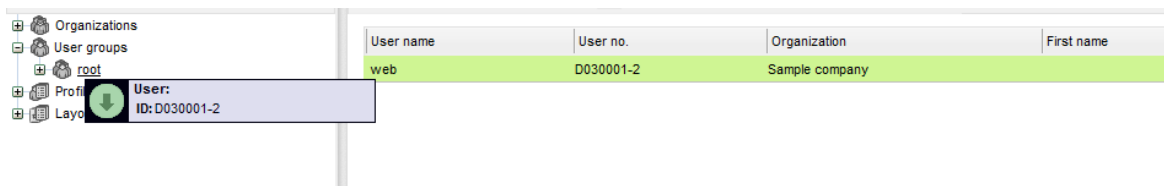
Tip: If a user enters an incorrect password three times in succession, that user account is automatically locked. To unlock a locked user, specify a new password for that user.

5.6 User groups

To create or change user groups use the native Administration module of Product 360 Media Manager. Via the Web interface you can only assign users to a user group or remove them from it.

You assign a user to a user group as follows:

1. In the navigation tree, open the organization to which the user belongs.
 - ⇒ The list of users is displayed in the main window.
2. Expand the user groups in the navigation tree so that you can see the individual user groups.
3. Select the user.
4. Move the user name to the desired user group using drag & drop.
 - ⇒ The user appears as a member of the user group.



Assigning a user to a user group

You remove a user from a user group as follows:

1. Open the user group in the navigation tree.
2. Select the user.
3. Select **Remove user** from the pop-up menu.
 - ⇒ The user is removed from the user group, i.e. the user no longer has any rights.





Note: If the tree directory for a user group contains 50 users or more, they are displayed in alphabetical groups. The grouping is based on the initial letters of the user name. ***They are not the same as normal user groups.***

5.7 Managing profiles

You can use profiles to configure how the content of the various modules in Product 360 Media Manager is structured. To do this, you create certain initial scenarios, field combinations, sort orders, table displays etc. You can manage profiles for the following categories:

- [General settings](#) ⁵²

- [Media assets](#)  53
- [Projects](#)  55

You create a new profile as follows:

1. In the navigation tree, select **Create profile template** in the "Profile templates" pop-up menu.
2. Enter a profile name.
3. Click on **Save**.
 - ⇒ The input screen for profile templates is displayed in the main window.
4. You will see the name of the profile in the "Profile" area.
5. Specify the settings for the profile under "Options". This area is divided into various tabs, in which you can specify the settings for the modules listed above.
6. Specify the sort order for selected fields.



7. Click on **Save** to save the changes.
 - ⇒ The new profile is displayed in the navigation tree.

To edit an existing profile, select it in the navigation tree and edit it as described above.

5.7.1 General settings

Profile template

Profile

Name Marketing

Options

General Media assets Projects

Modules

Start module Media assets

Media assets ☒

Projects ☒

Settings ☒

PIN sending

Validity in days 14

Profile template - General settings

You have the following configuration options here:

Name	Description
Start module	Select which module is displayed when you start the application.
Media assets	Specifies whether the Media assets module is displayed (activated by default).
Products	Specifies whether the Products module is displayed.
Print templates	Specifies whether the Print templates module is displayed.
Projects	Specifies whether the Projects module is displayed.
Settings	Specifies whether the Settings module is displayed.
PIN sending: Validity in days	Specifies the length of time for which a PIN sent is valid.

5.7.2 Media asset profile

Profile template

Profile
Name

Options

General **Media assets** **Projects**



Search result
Display
Sort by
Search in subgroups ☐
All versions ☐
Locked objects ☒
Linked objects ☒
Download
Cart list
Sort by
Carts per page
Cart properties
Display
Sort by
Elements per page
Pack by default ☒

Field management
List view
Available fields
File changed
Version number
In progress
Agency ID
Resolution
Color depth
Archive no.
Mode
State
Copy
Remove
Visible fields
Small preview icon
File name
ID
File size
Name
Status
Icons
Up
Down
Accordion settings
Available tabs
Copy
Remove
Visible tabs
Technical information
General information
Embedded meta data
Assignment
Derivatives
Edit
Cart properties
Up
Down
Default tabs

Profile template - Media assets

You have the following configuration options here:

Name	Description
Search results: Display	Search results are initially displayed in the way that is set here. You can choose between detail, light table or list view.
Search results: Sort by	Column by which the display is sorted
Search results: Objects per page	Number of rows per page
Search in subgroups	Specifies whether subgroups are also included in a search using the navigation tree
All versions	Specifies whether all versions of a media asset are displayed in the search
Locked objects	Specifies whether locked objects are displayed
Linked objects	Specifies whether linked objects are displayed
Download	Indicates the data used for a download. The order indicates which data type is searched first.
Cart list: Sort by	Column by which the display is sorted
Cart list: Carts per page	Number of rows per page
Cart properties: Display	The cart is first displayed in the light table or list view.

Name	Description
Cart properties: Sort by	Column by which the display is sorted
Cart properties: Elements per page	Number of rows per page
Cart properties: Pack by default	Specify whether the cart is to be packed by default. This setting can also be changed directly in the cart.
 Basic information for field management: Select the fields from the list box on the left (Available fields) and copy them to the box on the right (Visible fields). Here, you can specify the order in which they are displayed. To prevent the display of particular fields, select these fields in the list box on the right and click on Remove . Display of property fields with the field type "Long text" must be explicitly set. These are located at positions #101 to #110.	
Special features	
List view	Your individual field selection affects how the columns are displayed.
Light table view	Only two fields at a time can be displayed here. You can specify which ones these are.
Technical information	The rights period is not displayed by default and must be activated if required,
Advanced search	Here, you can select or deselect the fields provided in the drop-down list for the advanced search.
 Basic information for accordion setting: Select the tabs from the list box on the left (Available tabs) and copy them to the box on the right (Visible tabs). Here, you can specify the order in which they are displayed. To prevent the display of particular tabs, select these tabs in the list box on the right and click on Remove . Here, you define which areas in the secondary window on the right are displayed and in what order.	
Default tab	Select which area is displayed when you start the module

5.7.3 Project profile

Profile template

Profile

Name Marketing

Options

General Media assets Projects

Project list

Sort by Start of project ↑

Projects per page 8

Project components list

Sort by File name ↑

Project components per page 8

Display preview in components list ☒

Volume for new projects 0

Accordion settings

Available tabs

Visible tabs

Component details

Project details

Extra fields for project

Project assignment


Copy Remove Up Down

Default tabs Project details

Profile template - Projects

You have the following configuration options here:

Name	Description
Project list: Sort by	Column by which the display is sorted
Project list: Projects per page	Number of rows per page
Project component list: Sort by	Column by which the display is sorted
Project component list: Project components per page	Number of rows per page
Project component list: Display preview in component list	Displays a preview of the project components
Volume for new projects	Assign a Product 360 Media Manager volume to projects.

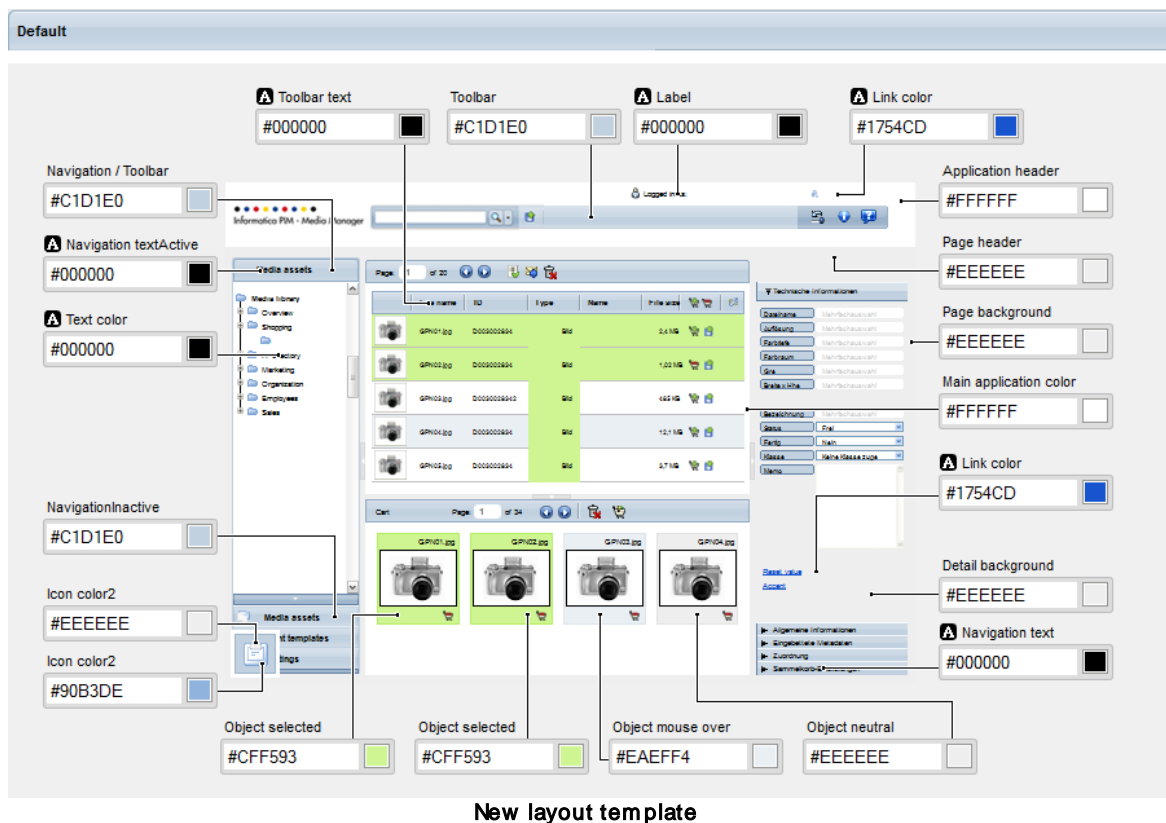
Name	Description
 Basic information for accordion setting: Select the tabs from the list box on the left (Available tabs) and copy them to the box on the right (Visible tabs). Here, you can specify the order in which they are displayed. To prevent the display of particular tabs, select these tabs in the list box on the right and click on Remove . Here, you define which areas in the secondary window on the right are displayed and in what order.	
Default tab	Select which area is displayed when you start the module


5.8 Managing layout templates


You create a new layout template as follows:

1. In the navigation tree, select **Create layout template** in the "Layout templates" pop-up menu.

⇒ A new layout template is displayed in the main window.




2. In the "Select layout template" area, choose an existing layout template to use as a basis for your new layout template.
3. In the "Define colors" area, you can use the input fields or the color picker to define a new color for the individual areas or texts.
 - Enter the color value in the input field in hexadecimal notation as an RGB value, for example #FF0000 for red.
 - Click on  to the right of the input field to open the color picker. You can now specify the new color using the color picker box or by entering the decimal RGB values.
4. In the "Select logo" area, you can use **Browse** to upload your own logo.
5. Enter a name for the layout template in "Save settings".
6. Click on **Save** to save the changes.
 - ⇒ The new layout template is displayed in the navigation tree.

 **Note:** It may take a while to create the new layout template as this involves creating graphics.

To edit an existing layout template, select it in the navigation tree and edit it as described above. To see which layout is assigned to which user, use the overview under [Layout distribution](#). ⁵⁷¹






5.9 Layout distribution

When you modify an existing layout, the layout must be reassigned to the users. Even if the layouts were created in an older version of Product 360 Media Manager, they must be updated after a software update. Please use the "Layout distribution" to do this. This overview shows which layouts exist in the system and the users and customers who use these layouts.

 **Note:** The first time you open the layout distribution, all existing layouts are displayed with no revision number. If a layout is saved in the current version, the correct revision number is displayed.

1. Open the "Layout templates" node in the navigation tree.
2. Click on the "Layout distribution" option.
 - ⇒ The layout distribution is displayed in the main window. The current system revision number is in the top left. The first column shows a preview of the main colors in the relevant layout. If there are user assignments to layouts that no longer exist, they are listed at the end of the table.

Layout distribution

Current system revision		6344		
	<input checked="" type="checkbox"/>	Regenerate layout	Dark	6233 10.11.10 15:31
	<input checked="" type="checkbox"/>	Reassign profile	Customer: Smith & Co.	6233 10.11.10 15:31
	<input checked="" type="checkbox"/>	Reassign profile	Users: heiler	6233 10.11.10 15:31
	<input checked="" type="checkbox"/>	Reassign profile	Users: Publication	6233 10.11.10 15:31
	<input checked="" type="checkbox"/>	Reassign profile	Users: Test	6233 10.11.10 15:31
	<input checked="" type="checkbox"/>	Regenerate layout	Default	6321 12.11.10 13:30
	<input checked="" type="checkbox"/>	Reassign profile	Users: bew	6321 12.11.10 13:30
	<input checked="" type="checkbox"/>	Reassign profile	Users: T201008	6321 12.11.10 13:30
	<input checked="" type="checkbox"/>	Reassign profile	Users: web	6321 12.11.10 13:30
	<input checked="" type="checkbox"/>	Regenerate layout	Grey classic	6233 10.11.10 16:01
	<input checked="" type="checkbox"/>	Reassign profile	Users: Erstein	6233 10.11.10 16:01
	<input checked="" type="checkbox"/>	Reassign profile	Users: MediaManager	6233 10.11.10 16:01
	<input checked="" type="checkbox"/>	Regenerate layout	Grey silver	6233 10.11.10 16:16
	<input checked="" type="checkbox"/>	Reassign profile	Users: ProduktManager	6233 10.11.10 16:16
	<input checked="" type="checkbox"/>	Regenerate layout	Silver	6233 10.11.10 16:30
	<input checked="" type="checkbox"/>	Reassign profile	Customer: Erstein	6233 10.11.10 16:30

Layout distribution

3. To create a new layout, enable the "Regenerate layout" option.
4. To reassign a layout to a user, enable the "Reassign layout" option.
5. If a layout that no longer exists is assigned to users, enable the "Delete assignment" option.
6. Click on **Apply** to execute the selected options.

➡ Depending on the number of layouts, the operation may take several minutes.

You can end the operation using **Cancel**, but the current operation is completed to prevent incomplete layouts from existing. The operation that is currently being processed is indicated by the progress bar in the respective row. Successfully completed operations are indicated by "OK".

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