

Asset Bank Organisational Units

Administrator User Guide

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Date: December 2, 2010

Version: d3

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1 Aim of this document

This Training Guide has been created to help new Organisational Unit Administrators (Org Unit Admins) get up to speed quickly and to act as a reference later. It outlines the main responsibilities for Org Unit Admins and explains how each of these is managed through Asset Bank's interface. For additional information on any area of Asset Bank, please see the on-line help:

<http://www.assetbank.co.uk/support/documentation/>

2 What is an Asset Bank Org Unit?

An Org Unit is a subset of a larger Asset Bank, for which administration has been delegated to local admin users (see figure 1). For example, an international Asset Bank may have Org Units for each country. This would be beneficial as the following could then be managed locally:

- Approving uploads/downloads of assets requested by users in your Org Unit (for those that need it)
- Approving or rejecting users who have registered
- Adding additional access levels (if you need to make a distinction between what users can and cannot see in your Org Unit)
- Manage existing users (troubleshooting, re-setting their passwords, etc.)
- Group management (determining what members of each group can see and do).

Delegation of such activities is usually most beneficial when:

- Local knowledge will speed up the administration task (for example authorising a download for a reason the Org Unit Admin is aware of)
- Time differences may otherwise lead to delays (e.g. approving an urgent download)
- There are just too many users to manage centrally.

Note: In addition to Org Unit Admins who look after their separate areas, there are also Super Admins who look after the entire Asset Bank as a whole.

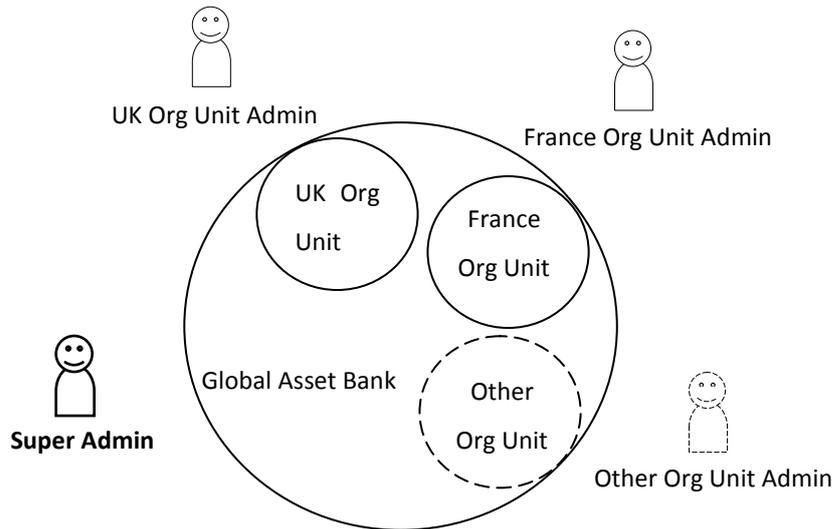


Figure 1 - An Org Unit Admin manages a sub-set of an Asset Bank

3 Managing an Org Unit

This section now steps through each of the tasks an Org Unit Admin can perform in more detail. The main menu options that are available to Org Unit Admins are highlighted in figure 2 below.

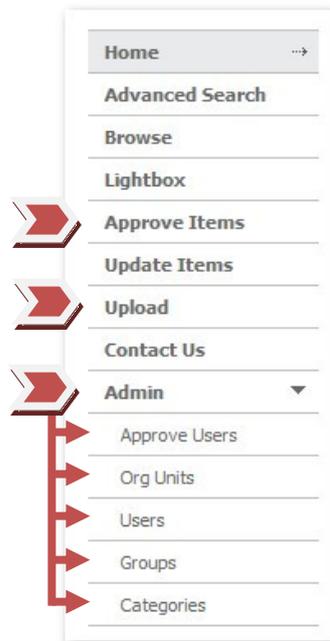


Figure 2 – Main Org Unit Admin functions highlighted

3.1 Approve Items

As an Org Unit Admin you may be required to approve uploads (checking assets before they are made available to the live application) and downloads (to ensure that assets are being used for the right purposes).

Note: Whether or not users actually need to seek approval depends on their group settings (see section 3.6.1 below).

When someone requests approval for either of these actions, then two things will happen:

1. All Org Unit Admins will be sent an email notifying them that there is something to action
2. There will now be assets for you to approve via the ‘Approve Items’ menu item.

You can if you wish opt out of the notification emails (please see Appendix A, 5.1).

3.1.1 Approving Uploads/Edits

If you have new uploads to approve, then click on the ‘Approve Items’ menu link. You will see the list of assets that need to be approved before they appear live in the application (figure 3). At this stage you have three options:

1. To approve the asset immediately
2. To reject it and delete it from the application
3. To reject the asset for resubmission later (for example, after you advise the user to complete missing metadata fields).

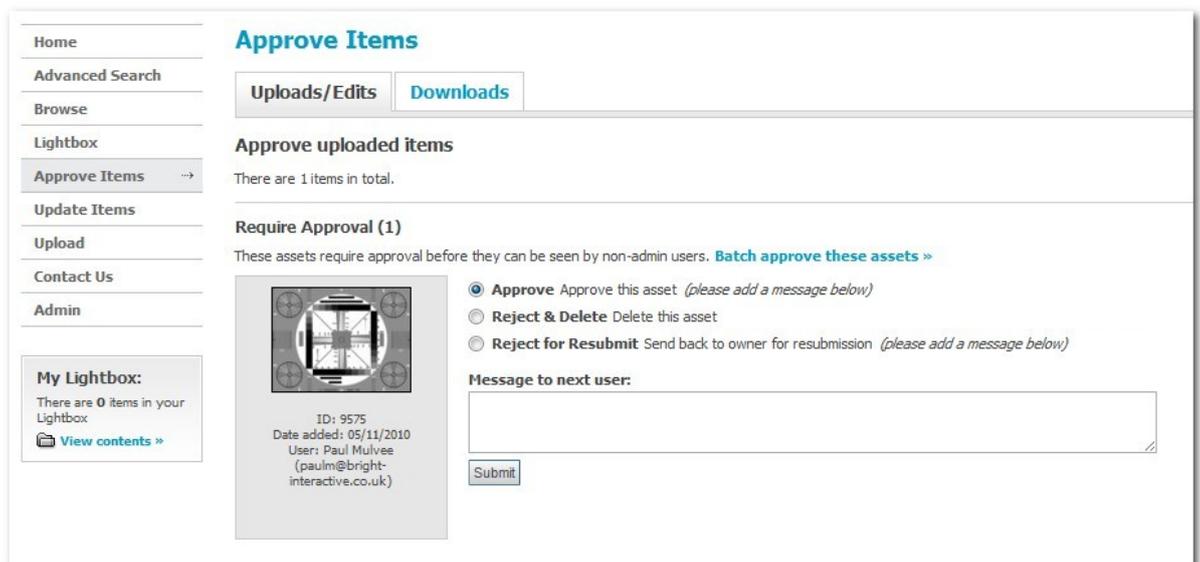


Figure 3 – Approving uploads

To help make your decision you can click on the asset thumbnail and you will be taken through to a page showing all asset information. You can then review this, go back to the approvals page and make your decision.

Another way to process items that need upload approval is via the 'Batch approve these assets' link. This then takes you through each asset yet to be approved, displaying its full list of metadata and presenting you with the Approval/Rejection options as you go. This is the quickest way to process uploads if you need to review all of the metadata for each asset (and possibly make changes).

3.1.2 Approving Downloads

To check to see if there are any downloads awaiting approval, click on the 'Downloads' tab (figure 4). You get email notifications for these too, unless you have turned off notification emails as shown in Appendix A 5.1 below.

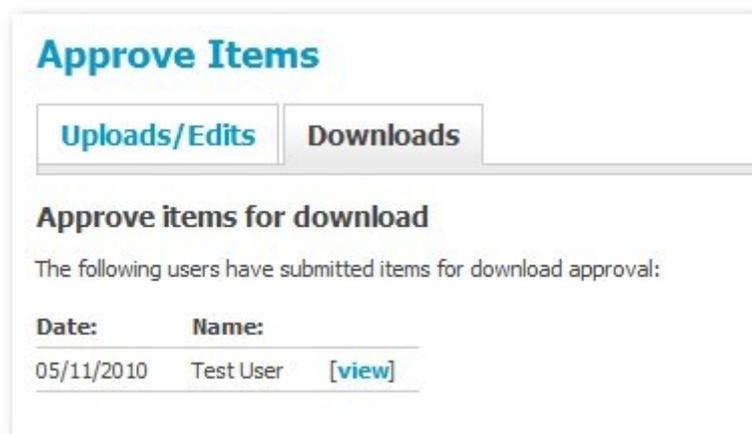


Figure 4 – Approving downloads

If you click on the [view] link next to a user, you are then shown a summary displaying which assets they want to download, the intended usage for this asset and any message that they have added. Approval status is set to pending by default. To approve these assets just change 'pending' to 'approved', add in a message (if relevant), set an expiry date for the approval (the date after which the user will no longer be able to download this particular asset without requesting approval again) and finally click 'Submit'. See figure 5.

Approve Items

Approval requests from Test User
Select Approval Status "Unapproved" to reject the request, or "Approved" to approve it. Optionally you may add a message to the user when approving or rejecting the request.

Item 1:
View this item»
Approval Status: Pending
Approval type: Standard download request
Intended Usage: MS PowerPoint
Message from the user: For use at a sales conference
Your message to the user: [Text Area]
Approval expires on: [Date Picker] (leave blank for the default of 30 days)

Item 2:
View this item»
Approval Status: Pending
Approval type: Standard download request
Intended Usage: Advertisement
Message from the user: For use in an advertisement
Your message to the user: [Text Area]
Approval expires on: [Date Picker] (leave blank for the default of 30 days)

Copy these values to all items »

Submit | Cancel

Figure 5 – Approving downloads for a particular user

To make it easier for an admin to give the same approval to a set of assets, there is a ‘Copy these values to all items’ link. For example, if you have 10 assets to approve, and you want to approve all and set the same expiry date for each, then just complete the first one, click on the link and then the others will now match. Finally, if you then want to set different values for a particular item, you can now do this before clicking the ‘Submit’ link at the bottom of the page. This can save administrators time when approving downloads.

3.2 Upload

As an Org Unit administrator you will have upload permissions by default. This allows you to add new assets to the application.

Uploading the highest quality original

It is important that you upload the highest quality version of the assets that you have available so that users can use the assets for a wide variety of uses, such as print (high resolution) or web (lower resolution). The highest quality version will typically have the highest pixel dimensions and overall file size. Asset Bank will automatically repurpose (i.e. reformat and resize) images when downloaded from the ‘Quick Download’ page, in order to give users an appropriate size for their purpose.

Entering as much metadata as possible

It is also important to add in as much metadata as possible (for example description and keywords) as this information is used by the application to present the best possible matches to user when they run a search.

From the upload tab you will see the following options:

- Single Upload
- Bulk Upload
- Unsubmitted
- Submitted.

3.2.1 Single Upload

This method is used for uploading one file at a time. You choose the file and then enter all relevant metadata (ensuring all mandatory fields are completed). Once you have done this and submitted the form, the file will be visible as a new asset to all users with relevant permissions.

More detail on Single Upload can be found here:

<http://www.assetbank.co.uk/go/help/upload/>

3.2.2 Bulk Upload

This method is used for uploading a number of files at once. These sets of files tend to have some metadata in common, such as the category they will be added to. The steps involved for this are:

1. Upload the files you want to import using the bulk uploader control.
2. Enter the metadata that is common to these files (for example the category they will appear in) and submit the form to start the import process.
3. Once the files have been imported, use the Batch Update to step through each one in order to enter any remaining metadata that is specific to each (for example the description).

More detail on Bulk Upload can be found here:

<http://www.assetbank.co.uk/go/help/import/>

3.2.3 Unsubmitted

When uploading an asset one of the options available is 'Do not submit yet'. Selecting this option means the asset will be only available to you until you decide to submit it to 'live'. The 'Unsubmitted' page shows those assets in one location so that you can edit and update them

until you are happy to submit them for other users to view or approve. The page lists all the unsubmitted assets along with a thumbnail representation of the asset and the actions that can be performed for each asset ('Submit to live', 'Submit for approval' and/or 'Delete').

The page also provides a link to batch update all the current user's unsubmitted assets.

3.2.4 Submitted

This page shows assets you have uploaded that have been submitted to another user for approval (if such an approval process is in place). As an Org Unit Admin this page will not be used as you already have permission to upload to your own Org Unit without the need for approval.

3.3 Admin > Approve Users

Org Unit Admins will receive an automatic email notifying them when a new user has registered for the Org Unit they manage. The admin user can choose to forgo these notification emails as described in Appendix A 5.1 below. If you receive a notification then you can go to 'Admin > Approve Users', in order to see a list of users awaiting approval to use the application (figure 6).



Figure 6 – Approving users

You now need to click on [view] to access each user's details and approve them. The approve user page that you get to (figure 7) allows you to:

- Approve or reject them
- Choose which group to add the user to
- Send an email notification of their approval/rejection
- Optionally set an expiry date (useful for creating temporary users)
- A password (leave blank for a randomly generated one)
- An optional message to include in the email the user will receive.

If it looks like someone has registered for your particular Org Unit in error, then you can explain this in the 'Rejection Message', asking to them to register again for the appropriate one.

Once you have completed the approve user page, click 'Save'. The user will now be sent either their approval email complete with password to allow them to start using Asset Bank, or their rejection email (if 'Email user?' is ticked).

Approve User

User Details

Username: Test2
Email Address: paulm@bright-interactive.co.uk
Forename: Test
Surname: User
Organisation: France
Language: English
Address 1: Test
Address 2:
Town: Test
County:
Postcode: Test
Country: United Kingdom
Register Date: 05/11/2010

User Permissions

User in Groups: France : Admin
 France : Users

Approval Status

Approve?: Approve ▾
Email user?:
Expiry date:
Password: (leave empty if you want a password to be generated automatically).
Optional Additional Message:

Save | Cancel

Figure 7 – Approve user page

3.4 Admin > Org Units

From here (figure 8) you can review how much space your particular Org Unit is using and any limit that has been set-up by the Super Admin. If your usage is reaching the storage quota then you should let your Super Admin know and also think about deleting any assets that are not used. Though of course, it may be more appropriate to seek additional space rather than delete something that may be useful at some point in the future.

Name	Storage Quota	Storage Usage	Actions
France	No limit	0.092 Mb	[edit] [access levels] [X]

Figure 8 – Manage your org unit

Other options available here include the [edit] link, which allows you to rename your Org Unit, and [access levels] (figure 9).

Organisational Unit: Access Levels

Organisational unit: France

You are at: » France

France sub-levels:
There are currently no sub-levels for this access level.

[Alphabetise access levels »](#)

Add new sub-access level to France:

Has permissions: **If an access level can have permissions, its parent access levels will have permissions also.*

Always assignable?: This access level can be assigned to items even when it has sub-levels.

New access level name:

Figure 9 – Org unit access levels

In the example shown, there are no sub-access levels for the ‘France’ Org Unit. In most cases this will be fine. You only need to create additional sub-access levels if at some point in the future you need to divide your Org Unit up into sets of assets that can be seen by one group, but not by another. If you need to do this, then this is where you set up the additional access levels needed.

More details on access levels can be found here:

<http://www.assetbank.co.uk/go/adminhelp/permcats/>

3.5 Admin > Users

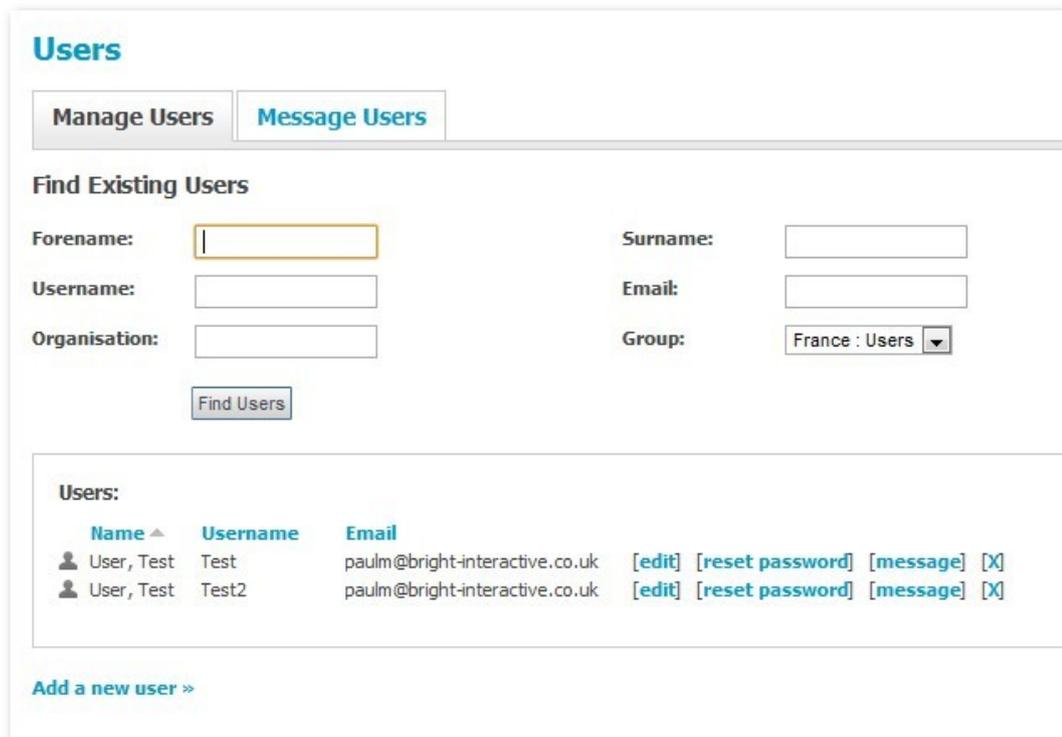
This is where you can manage and communicate with your users.

3.5.1 Finding Users

To find users just enter any combination of elements into the search fields and click 'Find Users' (figure 10).

Tip: one or two fields are usually enough to find the user you want.

To find all users of a particular Org Unit just click on the 'Find Users' button without entering in any information. Please note, however, that if you have a large number of users in your Org Unit then this will result in a long list (and the page may take a while to load).



The screenshot shows a web interface for managing users. At the top, there are two tabs: 'Manage Users' and 'Message Users'. Below the tabs is a section titled 'Find Existing Users' with several search fields: 'Forename:', 'Surname:', 'Username:', 'Email:', 'Organisation:', and 'Group:'. The 'Group:' field is a dropdown menu currently set to 'France : Users'. A 'Find Users' button is located below the search fields. Below the search section is a table of users with columns for 'Name', 'Username', and 'Email'. Each row has three action links: '[edit]', '[reset password]', and '[message]'. At the bottom of the interface, there is a link 'Add a new user >>'.

Users:	
Name ▲	Email
User, Test	paulm@bright-interactive.co.uk
User, Test	paulm@bright-interactive.co.uk

Figure 10 – Manage users

When you have found the user you are looking for, you then have access to a few other actions:

[edit] - allowing you to go back in and change user details including the group(s) they are in

[reset password] - allowing you to generate a new password for the user, for example if they have forgotten it. However, in general you should encourage users who have forgotten their passwords to reset it themselves by following the 'Forgotten Password?' link on the login page.

[message] - allowing you to send a message to this specific user (note, to send a message to entire groups, use the message tab at the top of this page)

[X] - allowing you to delete the user.

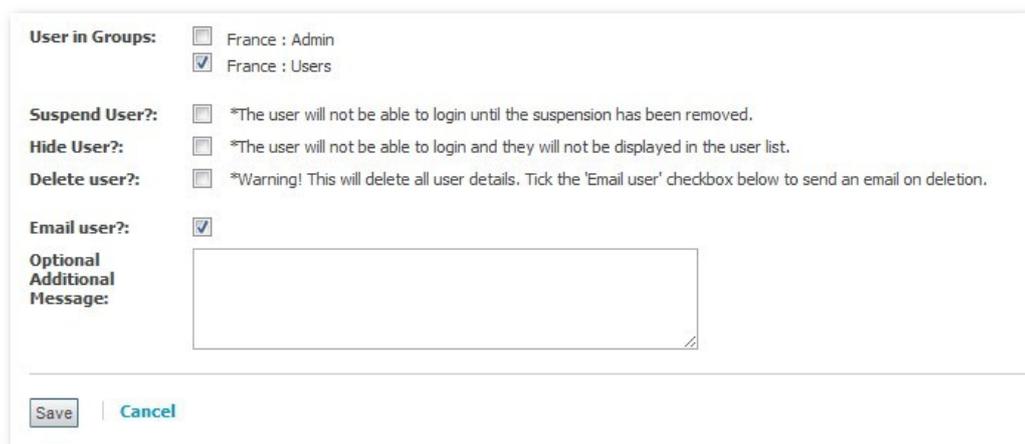
Deleting Users

Only delete a user from the application if you are sure you do not want them to login again in the future (for example, if an employee leaves the company). Alternatives to delete are available from the [edit] user link (figure 11), for example:

Suspend User (preventing them from logging in, until you uncheck this box at a later date).

Hide user (as above, but also removing them from the Find Users area).

If in doubt, choosing one of these options will allow you to quickly re-enable a user at a later date, saving you (or them) from re-keying their information, and ensuring other user stats are maintained (e.g. download usage).



The screenshot shows a form with the following sections:

- User in Groups:** Two checkboxes. The first is 'France : Admin' (unchecked). The second is 'France : Users' (checked).
- Suspend User?:** A checkbox with the text '*The user will not be able to login until the suspension has been removed.' (unchecked).
- Hide User?:** A checkbox with the text '*The user will not be able to login and they will not be displayed in the user list.' (unchecked).
- Delete user?:** A checkbox with the text '*Warning! This will delete all user details. Tick the 'Email user' checkbox below to send an email on deletion.' (unchecked).
- Email user?:** A checkbox (checked).
- Optional Additional Message:** A large empty text area.

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Figure 11 – The latter half of the [edit user] page

3.5.2 Adding a User

From this page you can create a new user (as opposed to a user registering and then you approving as per section 3.3 above). Click on 'Add new user' and fill in the information that the user would normally complete themselves (figure 12). In addition, set an expiry date (if the user is temporary for example), add in a password and choose the groups you wish them to be a member of.

Add User

If you leave the password fields blank a password will be generated automatically and the new user will be notified.

Username:*

Forename:*

Surname:*

Email Address:*

Organisation:

Address 1:*

Address 2:

Town:*

County:

Postcode:*

Country:*

Expiry date: Leave empty for never

Password:

Repeat password:

Send notification to user?

User in Groups: France : Admin
 France : Users

|

Figure 12 – Add user page

As an admin you can choose to create a new user by this means, or you could email them the link to the registration page and get them to complete the relevant fields, leaving you just to approve the application as per section 3.3 above.

3.5.3 Messaging Users

Within the user section you also have the option to message users. Select this tab and you will see the page as shown in figure 13. Here you can create a message, preview it and then quickly send it to one or all of the groups you manage.

Manage Users **Message Users**

From here you can send an e-mail to groups of users or individual users.
Enter the subject and body for the message, select which groups you wish the message sent to and click 'Preview' to see how your email will look before sending.
** denotes a required field*

Compose message

Subject: *

Body: *

Send to group

Select group(s): France : Admin
 France : Users

Or, send to user

You can send an email to multiple users by separating them with a comma.

Username:

[Preview »](#)

Figure 13 – Message users

3.6 Admin > Groups

From the admin menu you can access the Groups area. Here you can change what users in the various groups in your Org Unit can see and do (figure 14). We will only cover the most commonly used features in this section, with the more advanced covered in section 4 below (Managing Org Unit - Advanced Options).

Groups

Manage Groups

Filter by Name: [Filter](#) [Cancel Filter](#)

Org Unit Name	Group Name	Actions
France	Admin <i>(org unit admins)</i>	[edit] [access levels] [attribute exclusions] [attribute visibility] [filter exclusions] [usage exclusions] [remove all users]
France	Users	[edit] [access levels] [attribute exclusions] [attribute visibility] [filter exclusions] [usage exclusions] [remove all users]

[Add a group »](#)

Figure 14 – Manage groups

There is one important concept to be aware of with regards membership of groups. That is, if a person is a member of more than one group, then they will inherit the most open

permissions available in each. So for example, if in one group a user needs approval to upload images into a particular access level, but in another that user does not, then this means overall the user does not need approval for upload of assets into this access level.

Related to this, there is a special group called ‘*Logged in users’ that every user (with login details) is a member of by default. As an Org Unit Admin you will not be able to see this group as it is managed by the Super Admins of the application. So to summarise, if you cannot see why a user of one of your groups can see or do something that you think they should not be able to, then contact your Super Admin and get them to check the permissions in the ‘*Logged in users’ group.

3.6.1 Access Levels

This area enables you to set download, upload and advanced permissions for users of this group.

As an example, figure 15 shows the access level permissions or the ‘France’ Users Group.

Edit Group

Access Levels for 'Users':

From the list below you can set the permissions that a member of this group will have to each of the access levels.

Download Permission Key:

- 0 = None
- 1 = View
- 2 = Download after approval
- 3 = Download
- 4 = Approve downloads

Upload Permission Key:

- 0 = None
- 1 = Upload (requires approval)
- 2 = Upload and edit
- 3 = Upload, edit and delete
- 4 = Approve uploads

Advanced Permission Key:

- 1 = Advanced download
- 2 = Download originals
- 3 = Requires approval for high-res

Access Level	Download Permission					Upload Permission					Advanced Permissions		
	0	1	2	3	4	0	1	2	3	4	1	2	3
France	all	all	all	all	all	all	all	all	all	all	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save | Cancel

Figure 15 – Users Group [access levels]

Here download permissions are set to 3 (Download). This means the user can download assets flagged as belonging to ‘France’ immediately, with no intermediate approval needed.

Upload permissions are set to 0 (None), which means the user cannot upload any assets.

Finally, advanced permissions 1 (Advanced download) and 2 (Download originals) are set.

‘Advanced download’ means that the user will have an advanced tab visible at point of download. This gives them additional download options such as cropping, re-sizing, etc.

Checking the ‘Download Originals’ checkbox allows the user to download a the original, high res file - if this is not checked then they can only downloaded converted versions, i.e. usually images that are lower res.

‘Requires approval for hi-res’ is not ticked. This can be set-up if you need to, for example, prevent users downloading images at print quality resolutions.

If we now look at the [access level] page for the Org Unit Admin Group, we will see a different picture (figure 16).

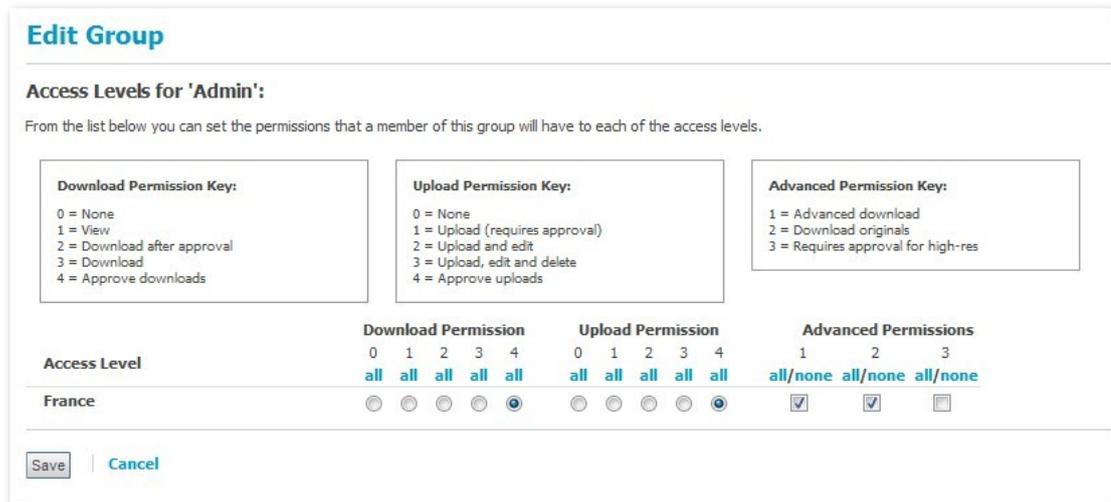


Figure 16 – Org Unit Admin Groups [access levels]

As an Org Unit Admin download and upload permission 4 is set, which means members of this group approve uploads and downloads of assets.

3.6.2 Remove All Users

This enables you to quickly remove all users from a particular group.

3.7 Admin > Categories

As an Org Unit Admin you will be able to see the category structure from this menu item. You may also be able to manage part of the category structure if this has been delegated to you (e.g. adding, deleting or renaming categories). By default though, this is not delegated to Org Unit Admins. If you believe that managing part of the category structure would be beneficial, then you should contact your Super Admin to set this up if they agree.

If they do agree, then to achieve this they would find your Admin Group via:

Admin > Groups

Then click on the [categories] link next to this group (this is visible only to Super Admins). From here they can select the place in the category tree from below which they would like you to have management rights.

4 Managing an Org Unit – Advanced Options

Here we describe the other aspects of the Admin > Groups area which are typically not used on a day to day basis by Org Unit Admins.

4.1 Admin > Groups

4.1.1 Edit Group

As shown in figure 17, here you have various options that allow you to set general limitations for members of this group. For example, can users email assets through the application at point of download (for example, instead of downloading and then attaching them to an email). As an admin you can determine which, if any, of these are appropriate for the groups you manage.

Edit Group

* denotes a mandatory field.

Name: *

Description:

Maximum daily downloads: Leave blank or set to 0 for unlimited daily downloads

Max download height (pixels): Leave blank for an unlimited download height

Max download width (pixels): Leave blank for an unlimited download width

Users can email assets:

Users can embed assets:

Users can view larger size:

Editors can only edit their own files: Note that if a user is in more than one group then they can edit other users' files if any group has this unchecked.

Organisational Unit: France (This is the org unit admin group)
Please note that once a group has been allocated to an organisational unit, it cannot be moved to a different one.

|

Figure 17 – Edit group page

Name: Allows you to rename your group.

Description: Optional description to remind you of the purpose of the group for example.

Maximum daily downloads: An option to restrict volume of downloads by members of this group.

Max download height/width: Another option allowing you to restrict downloaded image dimensions.

Users can email assets: Determines whether or not a user can email the asset at point of download (instead of just downloading to their desktop).

Users can embed assets: If turned on, then users will see an embed link on each asset page. If they use this they can then generate embed code for an asset that can be used in other websites to point to a copy of this image. This is generally not on by default, and should only be set if you are confident that your images should be used this way.

Users can view larger size: If turned on users will see the 'View larger size' link on asset pages.

Editors can only edit their own files: If ticked then users with upload and edit permissions will be restricted to only editing assets they themselves uploaded.

4.1.2 Attribute Exclusions

Here you can decide what users of a particular group can see based upon certain attributes (such as Active Status). E.g. if you tick the 'Active Status > Expired' checkbox, then members of this group will not see any assets in the application that have 'Expired' set as their active status.

4.1.3 Attribute Visibility

This is where you can choose to hide attributes from users if you think that seeing certain values might have a negative impact, or if you just want to simplify things for them. Again, as mentioned previously, users inherit the most open permissions from groups they are a member of. This includes the '*Logged in users' group that only super admins can amend. So if changing something here has no visible affect for a member of this group, and you want it to, then you may need to contact your super admin.

4.1.4 Filter Exclusions

A filter is something that may be set up by a super admin. For example, they could create a filter that sits on the homepage. It could contain a list of years for example:

No Filter
2009
2010

Then if a user chooses one of the filter options, then Asset Bank will then only display assets that have matching 'year' attributes.

Now, if this was set-up, then as an Org Unit Admin you would have the ability, via the [filter exclusions] link, to effectively hide any of these options from the particular group. E.g. you could choose to hide the 2009 option.

4.1.5 Usage Exclusions

From here you can choose to hide various usage types (download conversion options) for users. Generally this is not used unless there is a specific requirement for having a usage type that is valuable for one set of users, but deemed unsuitable for another.

5 Appendix A

5.1 Turning off admin alerts

If you would like to turn off notifications being emailed to you (e.g. when someone requests approval to download assets), then follow this process.

Log in as an Org unit admin

Go to:

Admin > Users

And look up your own account.

Click [edit] and you should now be taken to your own 'Edit User' page.

Midway down, you should see a 'Receives alerts:' checkbox. If you un-tick this, then you will no longer receive alerts.