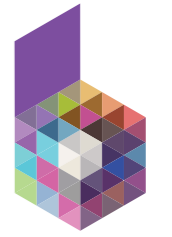




Contents

System Setup.....	5
Metadata	5
These are the 3 stages involved in creating and using metadata.....	5
Explanation of Metadata fields in detail	15
Metadata field types:	15
Featured Navigation	19
Workflow templates	21
Download Wizards.....	21
Applying a Download Wizard	23
Preferences	25
Setting Admin Email.....	25
Set Export Fields	27
Export Lists of Users	29
Email Content.....	33
Register Email (email sent to Admins informing a new user has registered)	33
Register Confirmation	35
Register Activation	37
Control content of email that is received by new users.....	37














brandworkz®

System Admin Training Materials

Chapter 8: System Setup

This chapter would be used by all users who are responsible for creation and maintenance of the site

System setup

 Metadata Set up metadata for assets, downloads, workflows, folders and users	 Workflow templates Define workflow processes	 Preferences Options for security, interface, upload, download, etc.
 Image download wizards Define how users can download and transform images	 Video download wizards Define how users can download and transform videos	 Email content Manage email content. Currently only supports certain email communications
 Featured navigation Manage the top navigation bar	 Create new root folder Create a new folder at the top of the navigation hierarchy	 Hot folders Manage hot folders on the Brandworkz server from which assets are automatically imported.
 Group homepages Redirect members of a group to an alternative landing page on login	 Manage translations Manage language translations for UI snippets	

SYSTEM [Reports](#) [Settings](#)

System Setup

Metadata

Metadata is used in various ways by the system from searches to what is displayed on the page, metadata is the blood that flows through the veins of Brandworkz. For example, on Showcase pages, when a user uploads a new showcase the form they fill in will be made up of a metaset. You can then choose to have certain fields from that set displayed on the page.

You can make as many metaset as you like which means you can apply relevant sets to all areas of your site but please note you can only apply one metaset per folder.

System setup

Metadata
Set up metadata for assets, downloads, workflows, folders and users

Workflow templates
Define workflow processes

Preferences
Options for security, interface, upload, download, etc.

Image download wizards
Define how users can download and

Video download wizards
Define how users can download and

Email content
Manage email content. Currently only

Metadata sets

Name	Type	Default for	Description
Asset library	Workflow Asset		
Asset library: Upload instructions	Workflow Asset		
Blog comments	Workflow Folder		
Blog New Blogs	Workflow		

Create new Metaset

* Metaset Name: Training Test

Metaset Description:

Asset Download Folder User Workflow

* Metaset Type: **Extended metasetypes are deprecated. If there is a situation when you need to make a metaset "Extended" please raise bug in JIRA.**

Default for:

Site/Language Options

Add **Cancel**

Metadata Fields

Existing metadata fields: none assigned

Create a new metadata field | Add an existing metadata field

Adding a new metadata field

Metafield type: TEXT

Display type: Text

Metafield name: Creator

Description/tooltip:

Default text:

Minimum number of characters:

Maximum number of characters:

Size:

Validate email address:

Hyperlink:

Mandatory:

Sort Order: 0

Allow multiple entries:

IPTC Mapping: None

XMP Mapping:

Read only:

Add **Cancel**

Name: Creator

* Type: Text (single-line)

Continue **Cancel**

Exercise – Create a new metaset with a mandatory field and

- 1 Click on the 'Settings' link in the bottom admin bar.
- 2 Click on 'Metadata'.
- 3 Click on 'Create new metaset'.
- 4 Enter a name, description and select the appropriate Metaset Type.
- 5 Click the 'Add' button - A new area titled 'Metadata fields' will appear below (an explanation of all these field types is listed below).
- 6 From the Metadata Fields section click on 'Create a new metadata field'.
- 7 Call the field 'Creator' and select 'Text' from the type dropdown menu.
- 8 Click the 'continue' button.
- 9 Check the mandatory checkbox to make fields mandatory.
- 10 Click 'add'.

The screenshots show the following steps:

1. In the folder overview, click on the 'Properties' button in the bottom toolbar.
2. In the 'Page Properties' dialog, expand 'General Options' and select 'Training Test' from the 'Asset metaset' dropdown.
3. In the 'Modify metadata' dialog, click the 'Edit' button in the top toolbar.
4. Back in the folder overview, the 'Creator *' field is visible at the bottom, indicating the metaset is active.

Exercise –

Add a metaset to a folder to force users to add the name of a Creator to an asset

1. Navigate to the folder created previous and click on 'properties' in the Folder actionbar.
2. On the 'Page Properties' page click on the arrow next to the 'General Options' to expand the box. From the asset metaset drop down select the metaset you have just created.
3. Select the newly created metaset.
4. Click 'Submit'.
5. Select an asset in this folder by checking the box beside it.
6. Click the 'edit' button in the asset detail page.
7. Verify that the metafields that were created for the metaset are displayed and the user can enter values.
8. Verify that the field is marked by an asterix which denotes that this field is mandatory and cannot be left empty.

System setup

Metadata
Set up metadata for assets, downloads, workflows, folders and users

Workflow templates
Define workflow processes

Preferences
Options for security, interface, upload, download, etc.

Image download wizards

Video download wizards

Email content
Manage email content. Currently only supports certain email communications

Hot folders
Manage hot folders on the Brandworkz server from which assets are automatically imported.

Metadata sets

Existing metaset	Type	Default for	Description
Asset library	Workflow Asset		
Asset library: Upload instructions	Workflow Asset		
Blog comments	Workflow Folder		
Blog New Blogs	Workflow		
Blog post	Workflow Folder		contains the metafields for each blog post,
Blog post categories	Workflow Folder Asset		
Blog post tags	Workflow Folder Asset		Blog post tags
Featured on homepage	Folder		Used on Homepage 3 on the Featured Folders widget
Herolmage	Folder Asset		
Images & Video	Asset		
Logo Finder	Folder		
Order form	Workflow Folder Asset		
Product spec Form	Workflow Folder		Product Development
Region			
Rejection comments			
Showcase: content			
System: Country list			
Training Test			
Who's Who			
Workflow: Briefing form			
Workflow: General comments			
Workflow: Print spec			
zzz Product spec Form			

View/Modify Metaset back to Metaset list

* Metaset Name:

Metaset Description:

Asset Download Folder User Workflow

* Metaset Type: **Extended metaset** are deprecated. If there is a situation when you need to make a metaset "Extended" please raise bug in JIRA.

Default for:

System Ref: TRAININGTEST_2

Site/Language Options

Editing existing metadata field

Metafield type: **TEXT**

Display type:

Metafield name: **4**

System Ref:

Description/tooltip:

Default text:

Minimum number of characters:

Maximum number of characters:

Size:

Validate email address:

Hyperlink:

Mandatory:

Sort Order:

Allow multiple entries:

IPTC Mapping:

XMP Mapping:

Read only:

5

Exercise – Modify a field in a metaset

- 1 Click on the 'Settings' link in the admin bar to go to the System Setup area
- 2 Click on 'Metadata'.
- 3 Select the metadata field that you would like to amend.
- 4 Amend the fields you'd like to update.
- 5 Click 'Update'.

System setup

1 **Metadata**
Set up metadata for assets, downloads, workflows, folders and users

Workflow templates
Define workflow processes

Preferences
Options for security, interface, upload, download, etc.

Image download wizards **Video download wizards** **Email content**

Metadata sets

Existing metaset	Type	Default for	Description
Asset library	Workflow Asset		
Asset library: Upload instructions	Workflow Asset		
Blog comments	Workflow Folder		
Blog New Blogs	Workflow Folder		
Blog post	Workflow Folder		contains the metafields for each blog post,
Blog post categories	Workflow Folder Asset		
Blog post tags	Workflow Folder Asset		Blog post tags
Featured on homepage	Folder		Used on Homepage 3 on the Featured Folders widget
HeroImage	Folder Asset		
Images & Video	Asset		
Logo Finder	Folder		
Order form	Workflow Folder Asset		
Product spec Form	Workflow Folder		Product Development
Region			
Rejection comments			
Showcase: content			
System: Country list			
Training Test			
Who's Who			
Workflow: Briefing form			
Workflow: General comments			
Workflow: Print spec			
zzz Product spec Form			

Hot folders
Manage hot folders on the Brandworkz server from which assets are automatically imported.

2 **System: Country list**

View/Modify Metaset back to Metaset list

* Metaset Name:

Metaset Description:

Asset Download Folder User Workflow

* Metaset Type: **Extended metaset** are deprecated. If there is a situation when you need to make a metaset "Extended" please raise bug in JIRA.

Default for:

System Ref: TRAININGTEST_2

Site/Language Options

Editing existing metadata field

Metafield type: **TEXT**

Display type:

Metafield name:

System Ref: CREATOR

Description/tooltip:

Default text:

Minimum number of characters:

Maximum number of characters:

Size:

Validate email address:

Hyperlink:

Mandatory:

Sort Order:

Allow multiple entries:

IPTC Mapping:

XMP Mapping:

Read only:

3

Exercise – Delete a field in a metaset

- 1 Click on 'Settings' and then 'Metadata' from the System Setup area.
- 2 Select the Metaset whose metadata field you would like to delete.
- 3 Select the metadata field you'd like to delete.
- 4 Click the 'delete' button at the bottom of the page.
Please Note: If you click the delete button in the middle of the page you will delete the whole metaset not just the metadata field and this cannot be undone.

Explanation of Metadata fields in detail

When you create a new metadata field you need to assign it a 'Type'. The type you need to assign will depend on what the field needs to display as.

Below is a list of all the metafield Types available

Metadata field types:

Integer	Use this option if you want users to enter a whole number.
Decimal	Use this option if you want users to enter a decimal number.
Date	Use this option if you want users to enter a date.
Date/time	Use this option if you want users to enter a date and time.
Text (single-line)	Use this option if you want users to enter general text in a line no longer than 254 characters long.
Text area (multi-line)	Use this option if you want users to enter general text in a multi line area (max. 16,000 characters).
Text editor (HTML content)	Use this option if you want users to enter "rich" text (e.g. text with bold, italic and bullet points).
Select box (dropdown)	Use this option if you want users to select only one option from a dropdown list. NB: Best suited if the number of options is high (e.g. above 5), otherwise use radio buttons.
Select box - hierarchical	Use this option if you want users to select only one option from a dropdown list which is hierarchical (e.g. showing A number of countries and within each country a number of cities)
Radio buttons	The user can select only one option from a group by clicking the radio button next to their choice. NB: Best suited if the number of options is low (e.g. Below 5), otherwise use a Select box
Checkboxes	The user can select one or more option(s) by ticking the checkbox next to their choice(s) NB: Best suited if the number of options is low (e.g. Below 5), otherwise use a multi-select
Multi-select box	The user can choose one or more options from a list. NB: Best suited if the number of options is high (e.g. above 5), otherwise use check boxes.
Multi select box - hierarchical	Use this option if you want users to select one or more option from a dropdown list which is hierarchical (e.g. showing A number of countries and within each country a number of cities) N.B. Hierarchical metadata fields can't be used in workflows.

System setup

1 Metadata: Set up metadata for assets, downloads, workflows, folders and users.

2 Metadata sets

Existing metaset	Type	Default for
Asset library	Workflow Asset	
Asset library: Upload instructions	Workflow Asset	
Blog comments	Workflow Folder	
Blog New Blogs	Workflow Folder	
Blog post	Workflow Folder	
Blog post categories	Workflow Folder Asset	
Blog post tags	Workflow Folder Asset	
Featured on homepage	Folder	

3 Metadata Fields

Existing metadata fields | Create a new metadata field | Add an existing metadata field

Manage Data | Reorder metadata fields | Duplicate metaset

Name	Type	Details
Creator	text	Mandatory Default: none

4 Adding an existing metadata field

* Metaset: Asset library

* Field: Region (radiobutton)

6 Continue | Cancel

7 REGION

Description/tooltip: []

Option Source: Option list below

Option(s): [] add

Options	Selected
EMEA	OFF
APAC	OFF
Americas	OFF
Global	OFF
APAC	OFF

modify | remove | set as default

move up | move down

Number of columns: []

Mandatory:

Sort Order: 3

Allow multiple entries:

IPTC Mapping: None

XMP Mapping: []

Read only:

6 Add | Cancel

Sharing Metadata Fields

Some metafields may apply to more than one Metaset, for example a drop down field for 'Region' may be appropriate for both an images metaset and a Showcase metaset. You have the option to share metafields accross metasets. This means if you add a country to the drop down it will appear in both the image metaset and the Showcase metaset.

Exercise – Sharing metadata fields

- 1** Click into 'Metasets'
- 2** Select a Metaset you would like to amend
- 3** Navigate to 'Add an existing metadata field'
- 4** Choose the metaset from which you'd like to share the data
- 5** Then choose the field
- 6** Click continue
- 7** Check the details are accurate
- 8** At bottom of page click 'Add'

System setup

- Metadata**: Set up metadata for assets, downloads, workflows, folders and users
- Workflow templates**: Define workflow processes
- Preferences**: Options for security, interface, upload, download, etc.
- Image download wizards**: Define how users can download and transform images
- Video download wizards**: Define how users can download and transform videos
- Email content**: Manage email content. Currently only supports certain email communications
- Featured navigation**: Manage the top navigation bar
- Create new root folder**: Create a new folder at the top of the navigation hierarchy
- Hot folders**: Manage hot folders on the Brandworkz server from which assets are automatically imported.

Featured Navigation

Home

Approvals
Blog
Campaigns
CMS
Images
Contact Us
Creative library
HR Toolkit
Marketing toolkit
Our Brand
PR
Products
Sales
Search
Showcase
System area
Testing
Whos Who

Add folder Save Navigation

Selected Item Options:
Move up Move Down Delete

Our Brand
Creative library
Marketing toolkit
Showcase
Products
Sales
PR
Approvals
Blog

EM Reports Settings

Featured Navigation

Home

Approvals
Blog
Campaigns
CMS
Images
Contact Us
Creative library
HR Toolkit
Marketing toolkit
Our Brand
PR
Products
Sales
Search
Showcase
System area
Testing
Whos Who

Add folder Save Navigation

Selected Item Options:
Move up Move Down Delete

Our Brand
Creative library
Marketing toolkit
Showcase
Products
Sales
PR
Approvals
Blog
Whos Who

brandworkz

Our Brand Creative library Marketing toolkit Showcase Products Sales PR Approvals Blog Whos Who

Settings

General admin

Users
Groups
Group Homepages
Create new root folder
Import tags & metadata
Disabled assets
Import Translations
Archive
De-Duplicate Images Tool

CMS setup
Data fields
Content CSS

System setup

General admin

- Users**: Manage user information and group memberships
- Create new root folder**: Create a new folder at the top of the navigation hierarchy
- Disabled assets**: Review deactivated files across the system
- Groups**: Manage user groups, roles and permissions
- Import tags & metadata**: Upload asset metadata from Excel
- Import Translations**: Upload or enter language translations
- Import / Export Workflow**: Import and Export Workflows
- Archive**: Review and manage archived files

Featured Navigation

The tabs you see at the top of your site are what we call 'Featured Navigation' and are links to folders on your site. As an admin user you can choose what folders are part of the featured navigation.

Exercise -

Add a folder to the 'Featured Navigation'

- 1 Click on 'Settings' in the bottom admin bar.
- 2 Click on 'Featured Navigation' from the System setup page.
- 3 Using the left hand tree navigate to the folder you wish to appear as a tab.
- 4 Click 'Add folder'.
- 5 Your selected folder will now appear in the right hand pane. You can also change the order in which the tabs appear by clicking the 'Move Up' or 'Move Down' buttons.
- 6 Click 'Save Navigation'.
- 7 The folder will now appear as a tab in the featured navigation.

System setup

Metadata
Set up metadata for assets, downloads, workflows, folders and users

Workflow templates
Define workflow processes

Preferences
Options for security, interface, upload, download, etc.

Image download wizards
Define how users can download and transform images

Video download wizards
Define how users can download and transform videos

Email content
Manage email content. Currently only supports certain email communications

Featured navigation
Manage the top navigation bar

Create new root folder
Create a new folder at the top of the navigation hierarchy

Hot folders
Manage hot folders on the Brandworkz server from which assets are automatically imported.

Group homepages
Redirect members of a group to an alternative landing page on login

Manage translations
Manage language translations for UI snippets

Image download wizards | **Video download wizards**

Existing download wizards | **Create new download wizard**

Image download wizard name	Type	Uses download
Hero Image	User	No
Download original file	Original	No

Create new download wizard | back to download wizard list

Name:

Download metaset: will get shown when users choose this wizard

Usage: Brandworkz only CMS only Brandworkz and CMS

Destination(s): Allow download to client (accessed from Download tab) Allow save to server (accessed from Modify button)

Download type

Download as original (no transformation applied - settings below ignored)

Use a custom script (settings below are optional)

Use the settings below

Allow user to modify	Item	Value (or Default value if 'Allow user to modify' is selected for the item)
<input type="checkbox"/>	Formats	<input type="checkbox"/> BMP <input type="checkbox"/> GIF <input checked="" type="checkbox"/> JPEG <input type="checkbox"/> PNG <input type="checkbox"/> TIFF If user is not allowed to modify, then you can only specify one format
<input type="checkbox"/>	JPEG visual quality	<input type="checkbox"/> 20 (low) <input type="checkbox"/> 50 <input type="checkbox"/> 80 (no visible loss) <input type="checkbox"/> 30 <input type="checkbox"/> 60 (high) <input type="checkbox"/> 90 <input type="checkbox"/> 40 (medium) <input type="checkbox"/> 70 <input checked="" type="checkbox"/> 100 (no loss)
<input type="checkbox"/>	Colour space	<input type="checkbox"/> Colour (RGB) <input type="checkbox"/> Colour (CMYK Process) <input checked="" type="checkbox"/> Greyscale <input type="checkbox"/> Black/White
<input type="checkbox"/>	Flip horizontal	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	Flip vertical	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	Rotate	<input checked="" type="radio"/> in 90 degree increments <input type="text" value="No rotation"/> or <input type="radio"/> any degree <input type="text" value="0"/> (positive values equals clockwise)
<input type="checkbox"/>	Scale type	<input type="radio"/> Don't scale <input checked="" type="radio"/> Fit within Height & Width below <input type="radio"/> Fit exactly to Height & Width below, pad with colour (Hex) <input type="text" value="Pick #ffffff"/> <input type="radio"/> Fit to Width below (auto-set Height) <input type="radio"/> Fit to Height below (auto-set Width)
<input type="checkbox"/>	Width/Height	Width: <input type="text" value="100"/> Height: <input type="text" value="100"/> Type: <input type="text" value="Pixels"/>
<input type="checkbox"/>	Resolution	<input type="radio"/> Don't change (same as source asset) <input checked="" type="radio"/> Fixed: <input type="text" value="100"/> Dots/Inch (dpi)
<input type="checkbox"/>	Add border	<input checked="" type="radio"/> No <input type="radio"/> Yes Size (pixels): <input type="text" value="1"/> Colour (Hex): <input type="text" value="Pick #ffffff"/>
<input type="checkbox"/>	Cropping	Note: cropping is only enabled on single-asset downloads <input checked="" type="radio"/> Do not allow user to crop <input type="radio"/> User can crop unconstrained or constrained <input type="radio"/> User must crop to constrained ratio <input type="text" value="1"/> / <input type="text" value="1"/> width/height ratio
<input type="checkbox"/>	Watermark	

Download Wizards

A download wizard is normally a predetermined set of values that converts an image on download to a set specification. Most images will be stored on your DAM at the highest resolution to ensure good quality. Some of your users may only ever need to use the images as small web versions. In this case you could create a download wizard that converts the image to 72DPI in RGB mode on download. This means the images will always be at the correct resolution and colour mode for them to use. Saving them time in having to open the images up and convert them. It's a good idea to check with your design team when setting up download wizards as they will normally know what specifications are most commonly used by your end users.

Download wizards can also be created and used with any pages on your Brandworkz system that allow you to insert an image, such as a CMS page or web to print template for example. You can set the download wizard to have cropping options as well as colour mode and resolution which means users will not be able to use an image that will not fit.

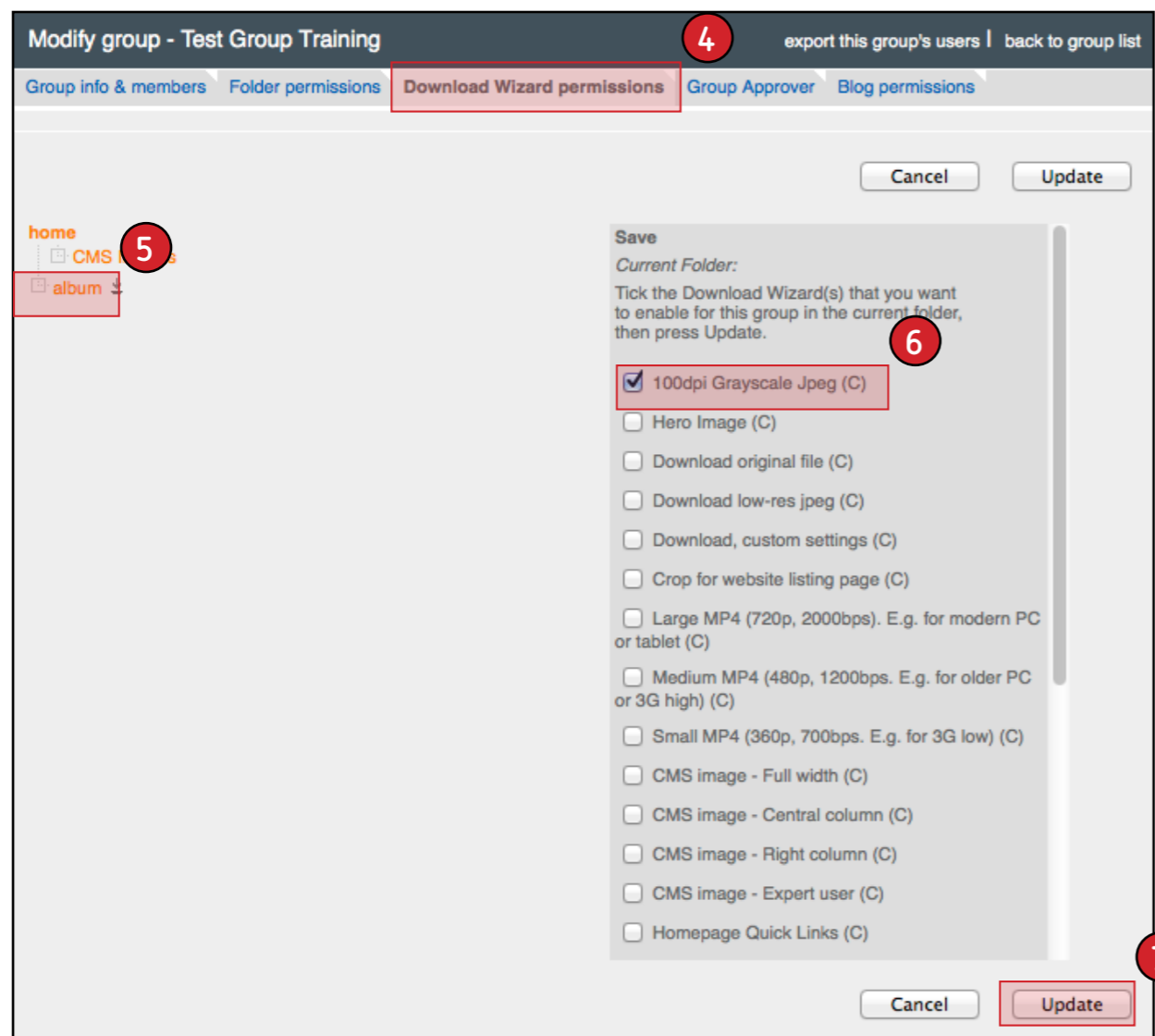
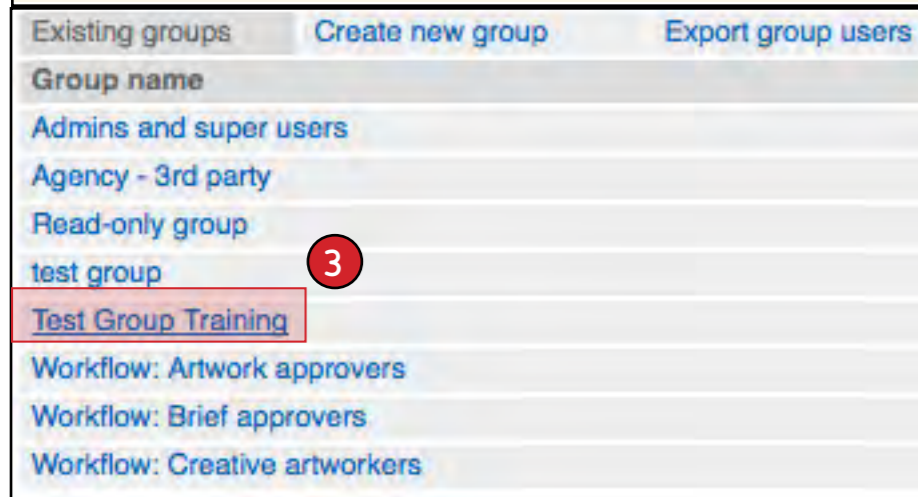
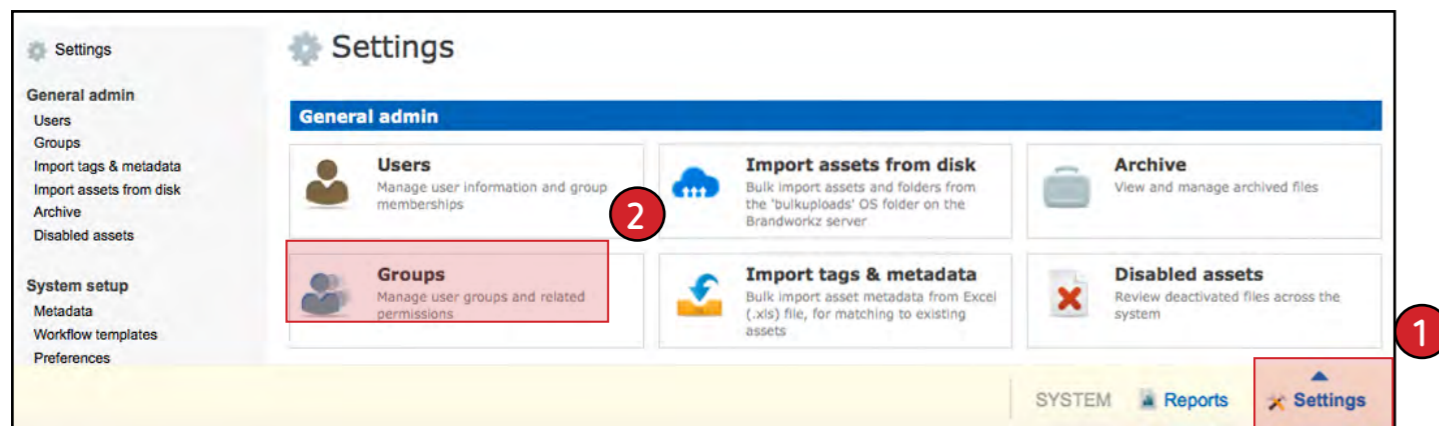
As long as you understand and have knowledge regarding image and photo file types you can amend a download wizard in any way you choose. Typically, the people who are most likely to know this are photographers, graphic designers and printers.

These are the steps you would take to create or amend a download wizard:

Please Note: Using a download wizard will not affect the original asset on your Brandworkz system.

Exercise – Create a download wizard

- 1 Click on the 'Settings' link in the admin bar to go to the System Setup area.
- 2 Click 'Download wizards'.
- 3 Click 'Create a new download wizard'.
- 4 Name your wizard.
- 5 Select the specifications you would like the download wizard to apply to the asset on download.
- 6 Click 'Apply'.



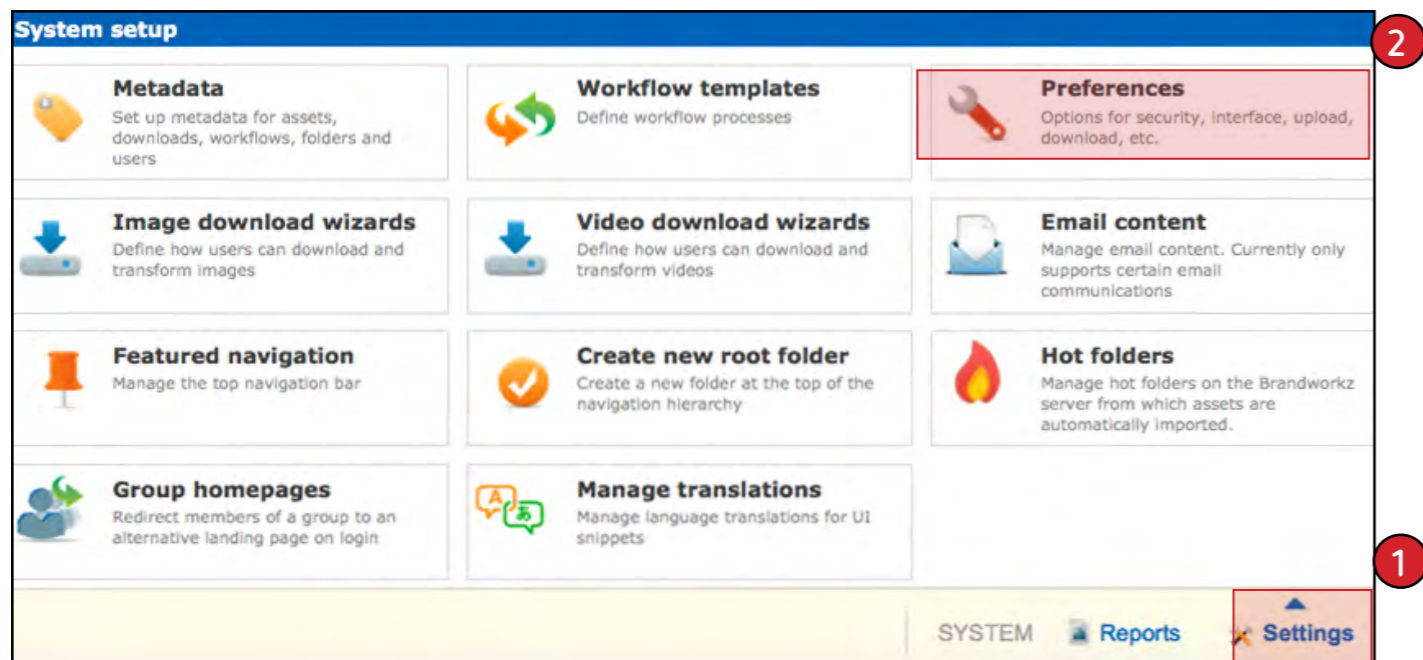
Applying a Download Wizard

For a download wizard to be accessible you need to apply it to a user group.

Exercise –

Apply download wizard to a folder(s)

- 1 Click on the 'Settings' link in the admin bar to go to the System Setup area.
- 2 Click on 'Groups'.
- 3 Select a group you would like to assign download wizards to.
- 4 Click on the 'Download wizard permissions' tab.
- 5 Select a folder from the list on the left.
- 6 Navigate to the download wizard listing on the right & tick the checkboxes for the download wizard(s) you would like to assign.
- 7 Click 'update'.



Preferences

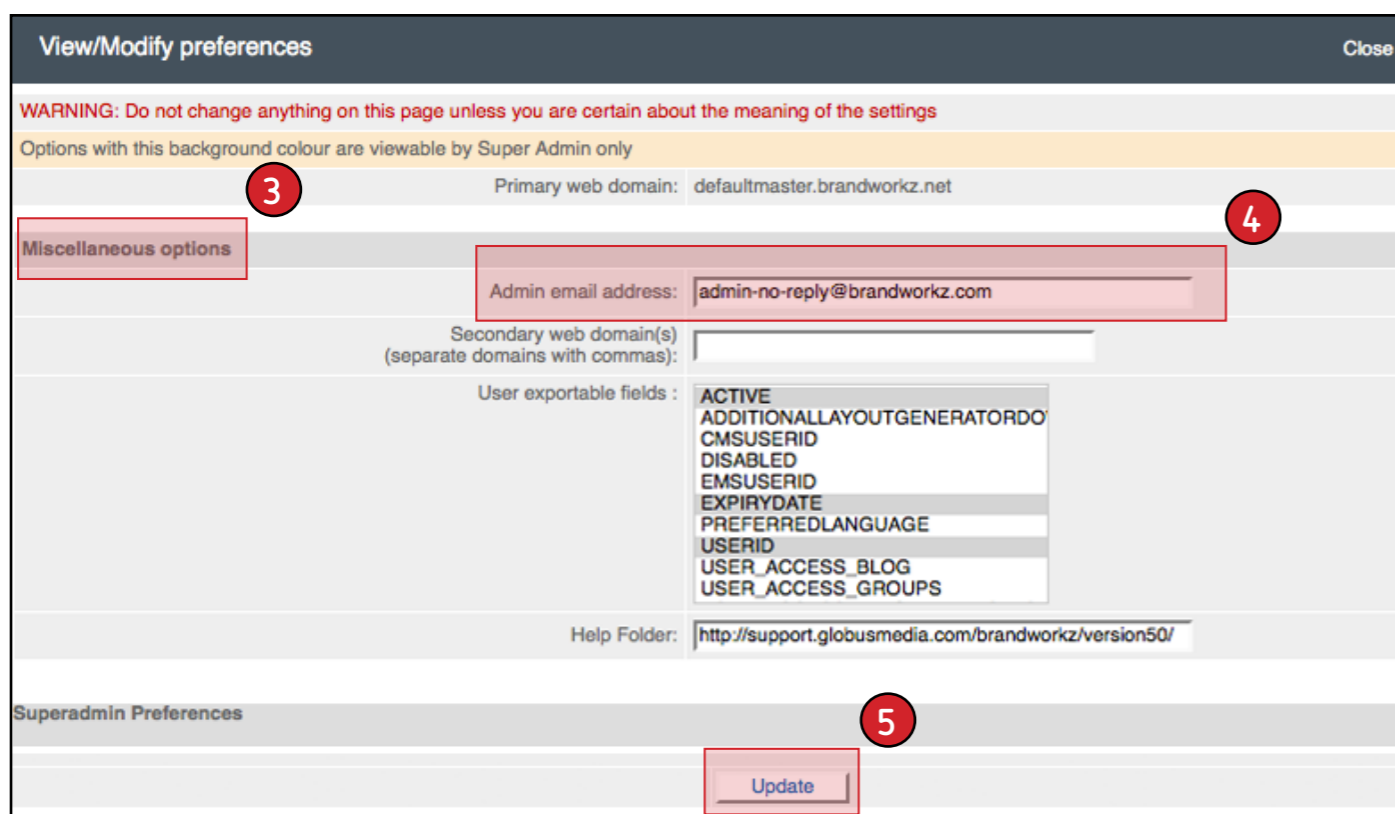
PLEASE DON'T AMEND ANYTHING IN PREFERENCES UNLESS YOU CONFIDENT THAT YOU ARE DOING THIS CORRECTLY! WE ARE AVAILABLE TO ANSWER ANY QUESTIONS YOU MAY HAVE.

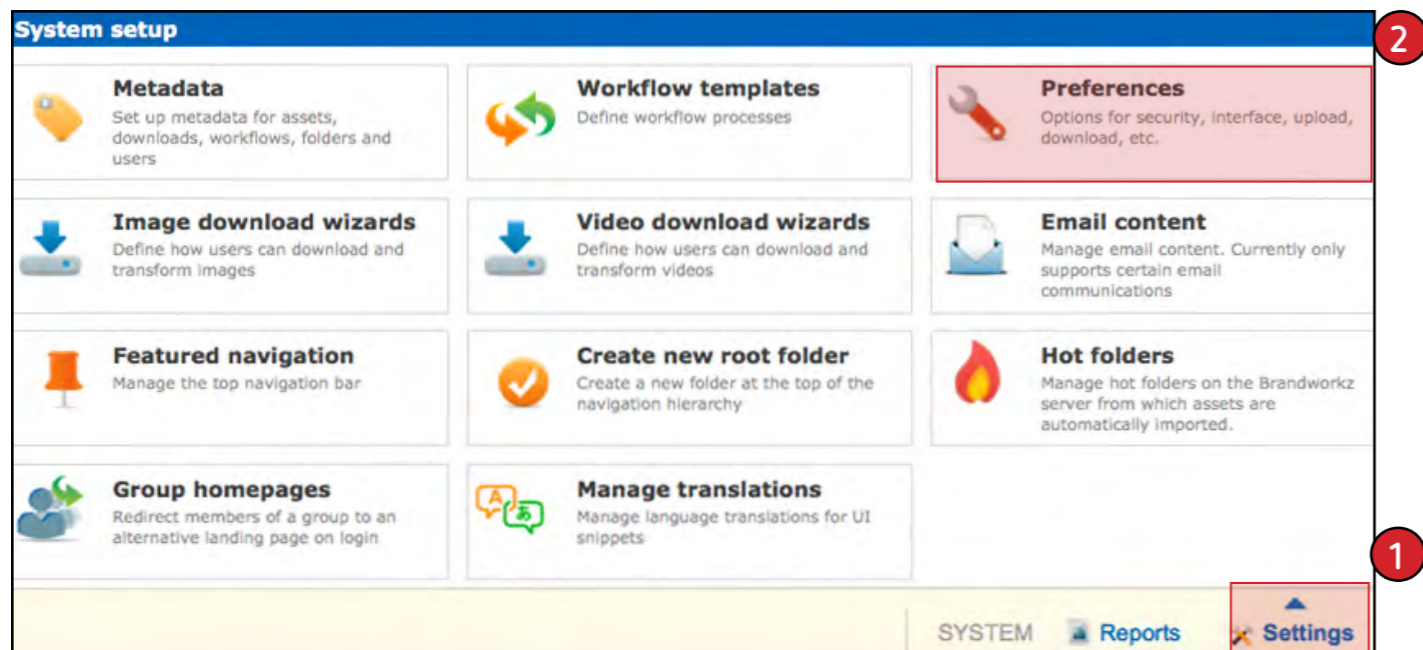
Setting Admin Email

When a user registers to use your Brandworkz system an email is sent to the Admin email address in the system. You set the Admin email address in the preference area. Please Note: It is a good idea for you to set up an email address that goes to more then one person in your company and use that as the Admin email address. That way if someone is away from the office the email will stil be picked up.

Exercise – Set email address of Admin

- 1 Click on the 'Settings' link in the admin bar to go to the System Setup area.
- 2 Click 'Preferences'.
- 3 Scroll down to 'Miscellaneous options'.
- 4 Within the 'Admin email address' amend as appropriate.
- 5 Scroll down to bottom of page, click 'update'.





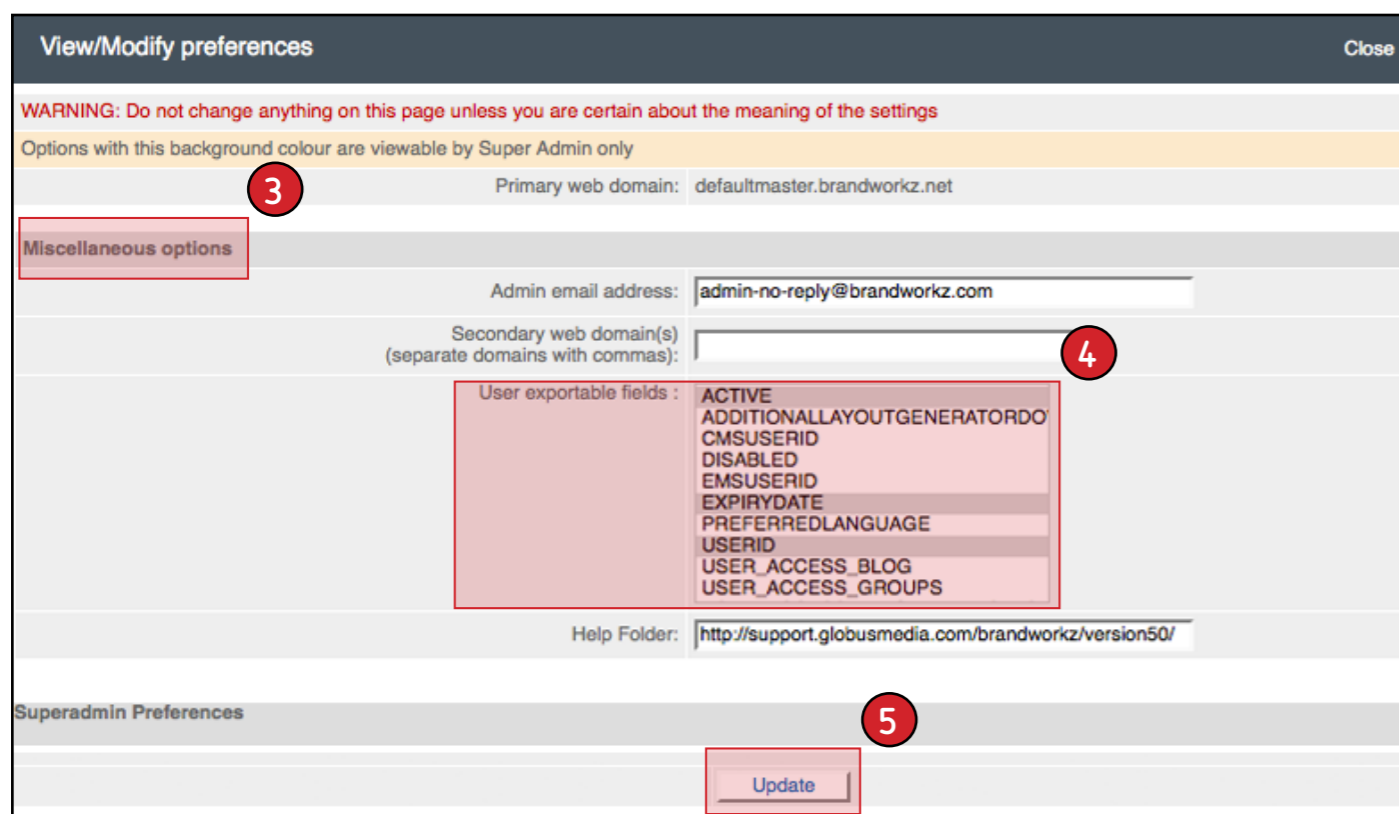
Set Export Fields

You can also set the list of user details you'd like to see output whenever you export a list of users or a group's user list.

Exercise –

Set list of fields that show when exporting a user list of group's user list.

- 1 Click on the 'Settings' link in the admin bar to go to the System Setup area.
- 2 Click 'Preferences'.
- 3 Scroll down to 'Miscellaneous options'.
- 4 Within the 'user exportable fields' select as appropriate.
- 5 Scroll down to bottom of page, click 'update'.



Home Help Albums superadmin Log out More search options Search site GO

brandworkz

Our Brand Creative library Marketing toolkit Showcase Products Aurora workflow Ursh workflow Product Whos Who

Settings

General admin

Users

Groups

Import tags & metadata

Import assets from disk

Archive

Disabled assets

System setup

Metadata

Workflow templates

Preferences

Settings

General admin

Users

Manage user information and group memberships

Import assets from disk

Bulk import assets and folders from the 'bulkuploads' OS folder on the Brandworkz server

Arch

View a

Import tags & metadata

Bulk import asset metadata from Excel (.xls) file, for matching to existing assets

Disa

Review system

USERS & GROUPS

New user

Manage users

Manage groups

CMS

Templates

Data fields

SETTINGS

Metadata

Workflow templates

Preferences

All

Existing Users

Create new user

Export list

User modified successfully

Reports

Settings

Full Name	Login	Organisation	Groups	Status	Admin
Admin User	administrator	Sample Inc	Admins and super users, Agency - 3rd party, Read-only group, Workflow: Artwork approvers, Workflow: Brief approvers, Workflow: Creative artworkers		users, metadata, reports
Brand workz	brandworkz	Brandworkz	Read-only group		
Chris Maigler	chris@bravemedia.co.uk	Brave Media		disabled	
Joe Blogs	joe.blogs	brandworkz	test group		users, groups
Muzeeb Mohammed	muzeeb		Admins and super users, test group		
No Reply	No reply	Brandworkz	Read-only group		
Sample Approver	Sample Approver	Sample Inc	Workflow: Artwork approvers		
Sample Artworker	Sample Artworker				
Sample - Read Only	readonly				
satish varma	test00				
Super Admin	superadmin				

11 users in system

Cancel

Submit

Display options:

HTML Table

MS Excel Spreadsheet

User info:

select all | clear all

ACTIVE

EXPIRYDATE

USERID

USER_COMPANY

USER_COUNTRY

USER_DEPARTMENT

USER_EMAIL

USER_FIRST_NAME

USER_LAST_LOGIN

USER_LAST_NAME

USER_LOGIN

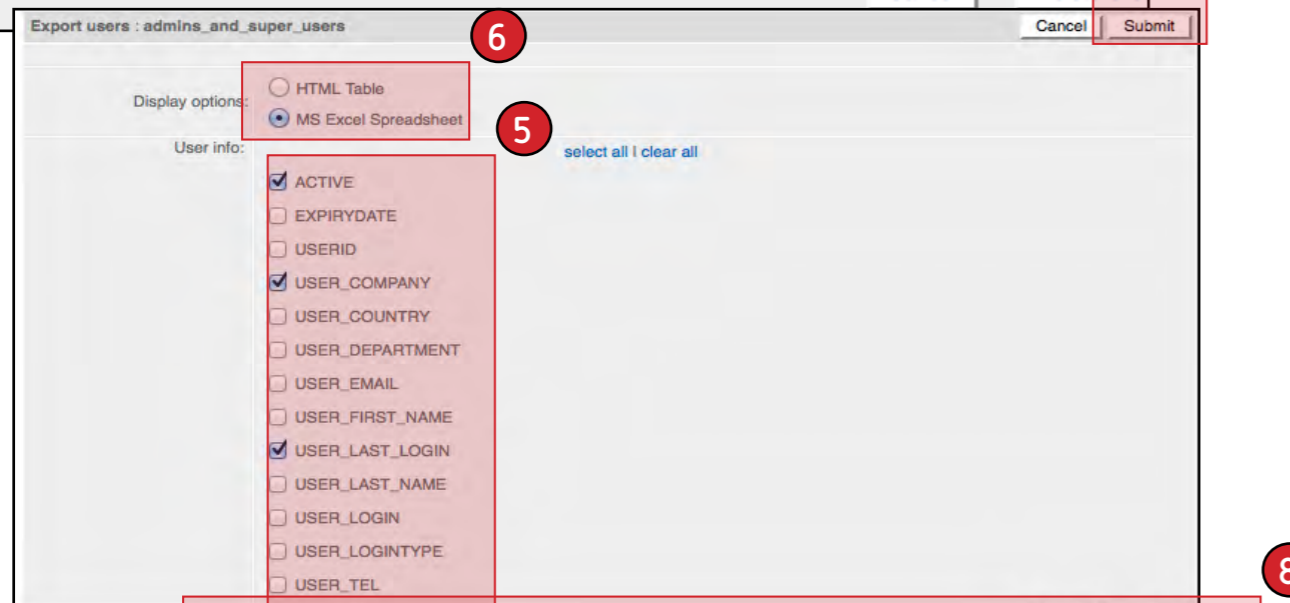
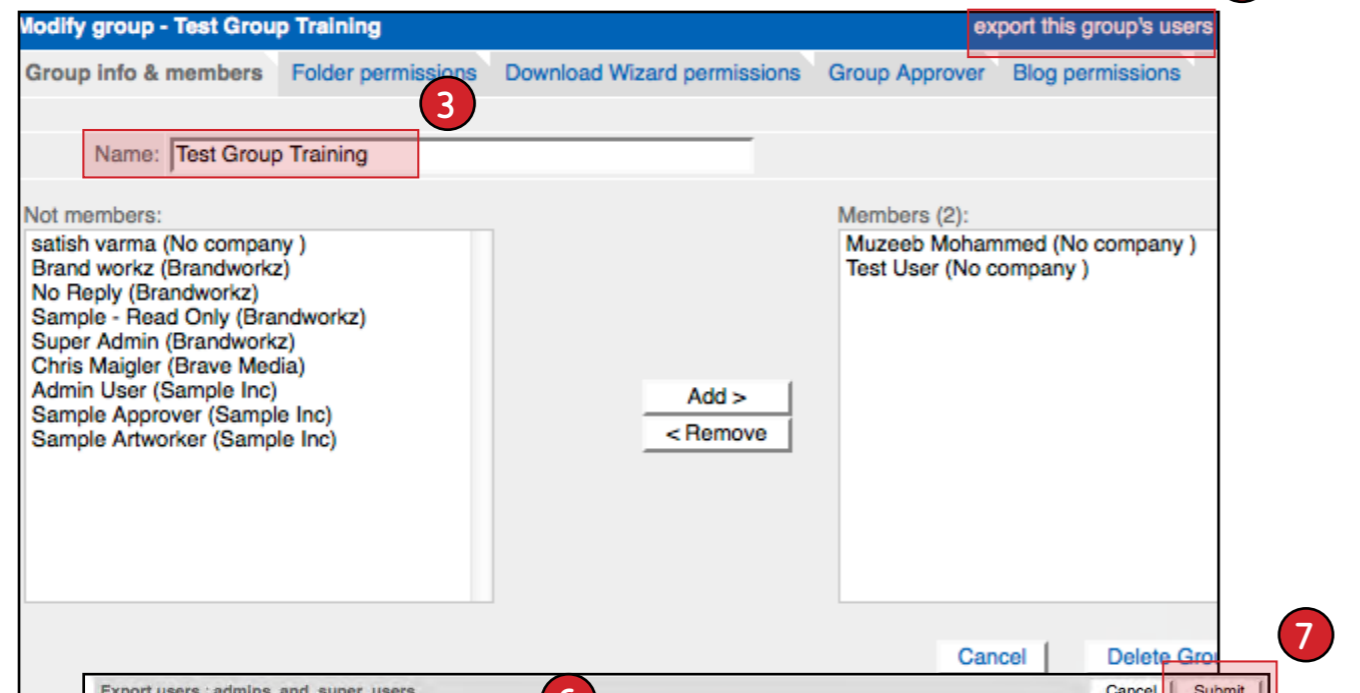
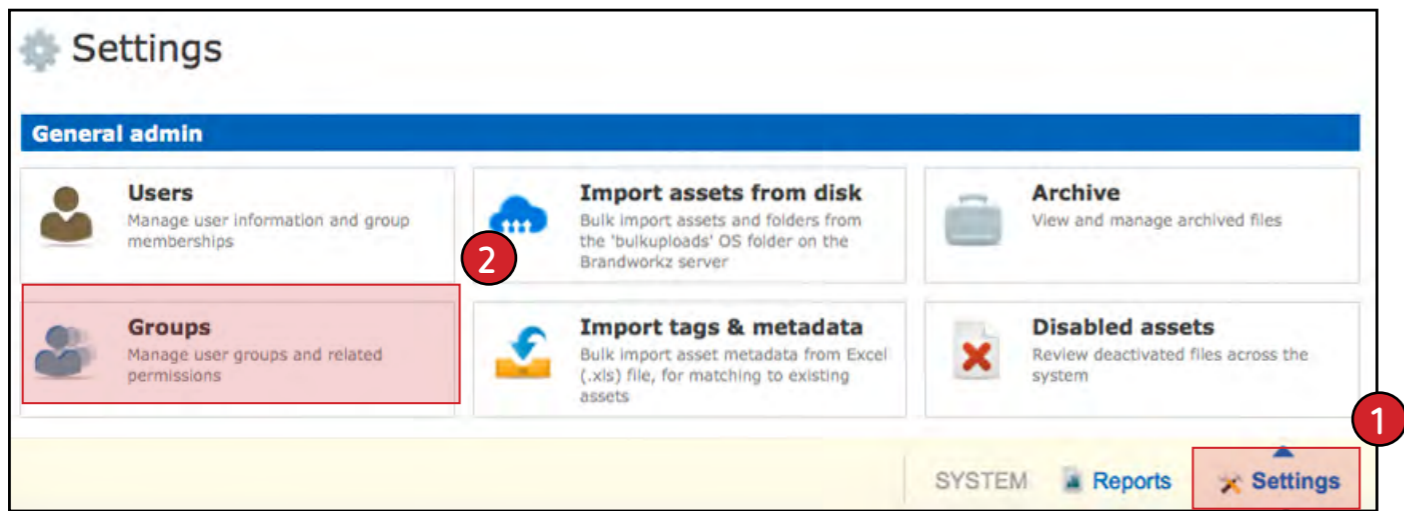
	A	B	C	D
1	GROUP_NAME	ACTIVE	USER_COMPANY	USER_LAST_LOGIN
2	Admins and super users	1	Brandworkz	February, 20 2014 14:09:10
3	Admins and super users, Agency - 3rd party, Read-only group, Workflow: Artwork approvers, Workflow: Brief approvers, Workflow: Creative artworkers	1	Sample Inc	June, 22 2012 16:08:14
4	Admins and super users, test group	1		February, 21 2014 09:58:00
5	Admins and super users, test group	1		February, 21 2014 11:34:56
6	Read-only group	1	Brandworkz	June, 18 2012 19:37:06
7	Read-only group	1	Brandworkz	
8	Read-only group	1	Brandworkz	October, 20 2013 13:42:01
9	Workflow: Artwork approvers	1	Sample Inc	August, 20 2013 17:48:32
10	Workflow: Creative artworkers	1	Sample Inc	July, 10 2013 12:35:50

Export Lists of Users

Once you've done the above exercise, you can go back into your user page or group and export the list of users. (see above section - General System Admin)

Exercise – Export List of Users

- 1 Hover over the 'Settings' button in the admin bar and click on the 'Manage users' link from the flyout.
- 2 At the top of the list of users click on the 'Export list' button.
- 3 From the export options screen choose if you'd like the reports as a HTML table or Excel spreadsheet and tick/untick the information you would like to export.
- 4 Click 'Submit'.
- 5 Find the downloaded document on your computer to open & review details.



	A	B	C	D
1	GROUP_NAME	ACTIVE	USER_COMPANY	USER_LAST_LOGIN
2	test group	1		February, 21 2014 09:58:00
3	test group	1		February, 21 2014 11:34:56
4	test group	1		

Exercise – Export Group's Users

- 1 Click on the 'Settings' link in the admin bar to go to the General Admin area
- 2 Click on 'Groups'.
- 3 Choose a group whose user details you'd like to export.
- 4 Navigate to the section 'export this group's users' and click this.
- 5 A list will appear and you can tick the relevant fields.
- 6 Choose either 'HTML' or 'Excel Spreadsheet'.
- 7 Click 'Submit'.
- 8 A list of user details will appear in a new window or as a downloaded Excel document.

System setup

- Metadata**: Set up metadata for assets, downloads, workflows, folders and users
- Workflow templates**: Define workflow processes
- Preferences**: Options for security, interface, upload, download, etc.
- Image download wizards**: Define how users can download and transform images
- Video download wizards**: Define how users can download and transform videos
- Email content**: Manage email content. Currently only supports certain email communications
- Featured navigation**: Manage the top navigation bar
- Create new root folder**: Create a new folder at the top of the navigation hierarchy
- Hot folders**: Manage hot folders on the Brandworkz server from which assets are

Email Content

Item	Language	Subject
registeractivation	English - United Kingdom	{sitename} Account activated
registerconfirmation	English - United Kingdom	Thank you for registering with {sitename}
registeremail	English - United Kingdom	The following user has requested access {sitename}

Superadmin: [Create new communication](#)

Communication - Create new communication back to list

Item:

Language:

Subject:

Plain content:

The following user has requested access to {sitename}

Username test: {username}

- * Name: {firstname} {lastname}
- * Region: {region}
- * Country: {country}
- Company: {company}
- Department: {department}
- Email: {email}
- Telephone: {telephone}

Please click the following link to go to this person's registration screen and activate the user. {link}

Notes to registration screen:

- * Under General, you can optionally modify their personal details, expiry date and skin.
- * Under Admin rights, you can optionally give them additional admin rights.
- * Under Group allocation, you must assign the user to at least one group.
- * After clicking "Submit and notify" the user will be activated and you will get the opportunity to send the user an email notification.

Content Html:

The following user has requested access to {sitename}

Username : {username}

- * Name: {firstname} {lastname}
- * Region: {region} * Country: {country}
- Company: {company}
- Department: {department}
- Email: {email}
- Telephone: {telephone}

Please click the following link to go to this person's registration screen and activate the user.{link}

Notes to registration screen:* Under General, you can optionally modify their personal details, expiry date and skin.* Under Admin rights, you can optionally give them additional admin rights.* Under Group allocation, you must assign the user to at least one group.* After clicking "Submit and notify" the user will be activated and you will get the opportunity to send the user an email notification.

Path: p

Save

Email Content

There is functionality allowing the Sys Admin to amend the content within three of the auto-generated emails. Below is noted the typical email content for each of the three emails.

Register Email (email sent to Admins informing them that a new user has registered)

The following user has requested access to {sitename}

Username: {username}

Name: {firstname} {lastname}

Region: {region}

Country: {country}

Company: {company}

Department: {department}

Email: {email}

Telephone: {telephone}

Please click [HERE](#) to go to this person's registration screen and activate the user.

Notes on the registration screen:

Under General, you can optionally modify their personal details, expiry date and skin.

Under Admin rights, you can optionally give them additional admin rights.

Under Group allocation, you must assign the user to at least one group.

After clicking "Submit and notify" the user will be activated and you will get the opportunity to send the user an email notification

Email Content

Item	Language	Subject
registeractivation	English - United Kingdom	{sitename} Account activated
registerconfirmation	English - United Kingdom	Thank you for registering with {sitename}
registeremail	English - United Kingdom	The following user has requested access {sitename}

Superadmin: [Create new communication](#)

Communication - Create new communication back to list

Item:

Language:

Subject:

Plain content:

Content Html:

Path:

Register Confirmation

Email sent to users saying 'Thank you for registering, we will let you know once your account has been activated.'

Thank you for registering with Brandworkz. You will be notified when your account is activated.

Username test: {username} test

Name: {firstname} {lastname}

Region: {region}

Country: {country}

Company: {company}

Department: {department}

Email: {email}

Telephone: {telephone}

Email Content

Item	Language	Subject
registeractivation	English - United Kingdom	{sitename} Account activated
registerconfirmation	English - United Kingdom	Thank you for registering with {sitename}
registeremail	English - United Kingdom	The following user has requested access {sitename}

Superadmin: [Create new communication](#)

Communication - Create new communication back to list

Item:

Language:

Subject:

Plain content:

Content Html:

Path:

Register Activation

Email to Users saying 'Account has now been activated, they can now log in with their details submitted at point of registration.'

Dear {firstname} {lastname},

Your Brandworkz account has been activated.

You can now login at {sample URL} using the username and password you supplied when you registered

Control content of email that is received by new users.

{username} = login field filled in,

{firstname} = first_name field filled in,

{lastname} = last_name field filled in,

{region} = UserRegion field filled in,

{country} = UserCountry field filled in,

{company} = Company field filled in,

{department} = UserDepartment field filled in,

{email} = Email field filled in,

{telephone} = Tel field filled in,

{sitename} = Websites displayname