Contents

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

brandworkz®

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 metasets 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

Create new

Existing metasets			
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   back to Metaset list

* Metaset Name: Training Test

Metaset Description:

☑ Asset ☐ Download ☐ Folder ☐ User ☐ Workflow

* Metaset Type: ⓘ Extended metasets 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 | Create a new metadata field | Add an existing metadata field
none assigned

Adding a new 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'.

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.

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'.

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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.

Reports ▲ Settings

Metadata sets

Existing metasets	Create new		
Name	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
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			

View/Modify Metaset   back to Metaset list

* Metaset Name: Training Test

Metaset Description:

☑ Asset ☐ Download ☐ Folder ☐ User ☐ Workflow

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

Default for: Asset

System Ref: TRAININGTEST_2

▷ Site/Language Options

[Update] [Delete] [Cancel]

Editing existing metadata field

Metafield type:	TEXT
Display type:	Text
Metafield name:	Creator
System Ref:	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:	☐

[Update] [Delete] [Cancel]

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 asign 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.

Sharing Metadata Fields

Some metafields may apply to more then one Metaset, for example a drop down field for 'Region' may be appropiate 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'

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

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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

Reorder Existing download wizards

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

... M | Reports | ▲ Settings

Create new download wizard | back to download wizard list

Name: 100dpi Grayscale Jpeg
Download metaset: none ▼ *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 [please select ▼] (settings below are optional)
◉ Use the settings below

Apply | Submit | Delete

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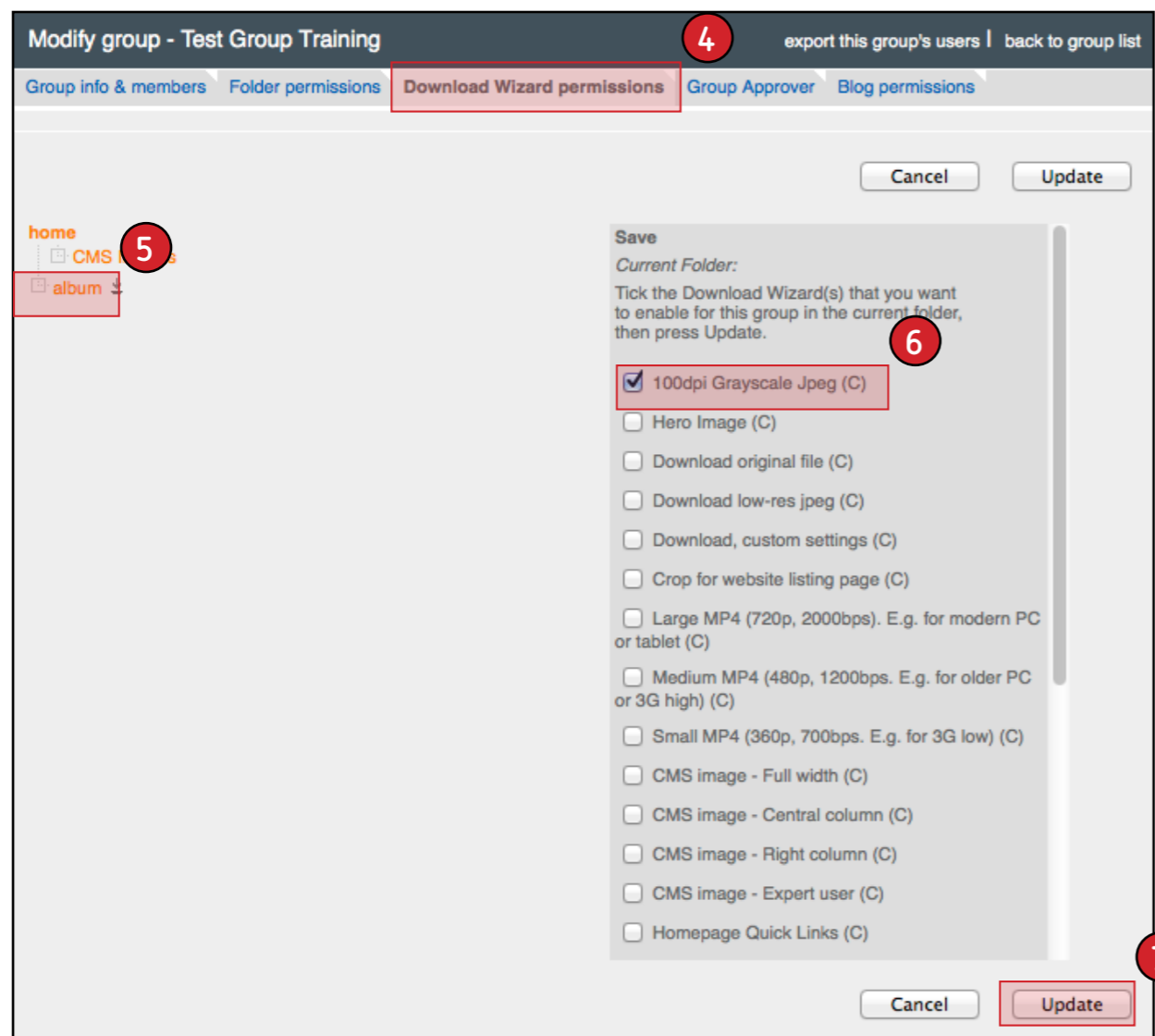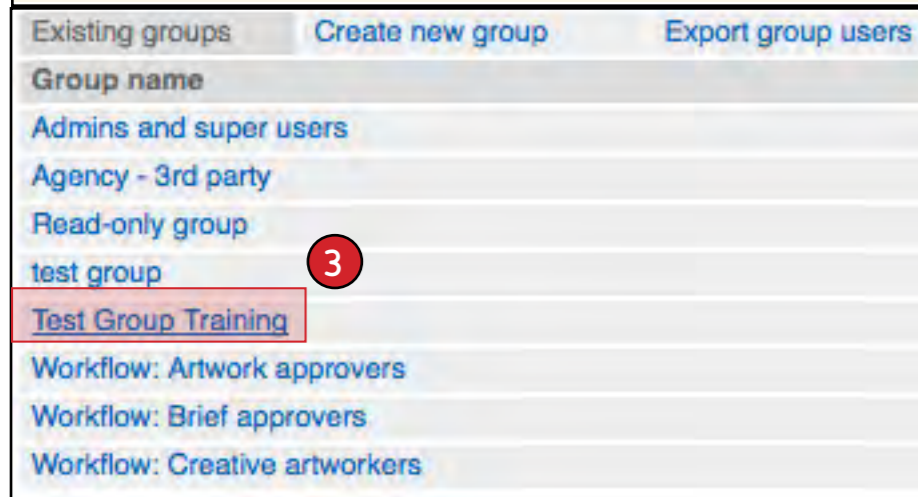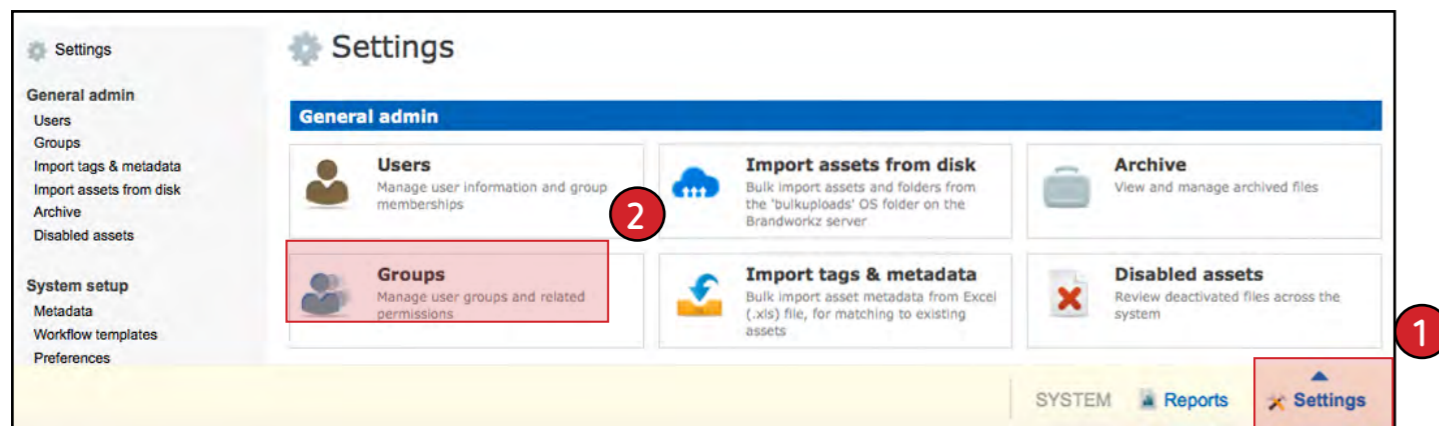
Applying a Download Wizard

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'.
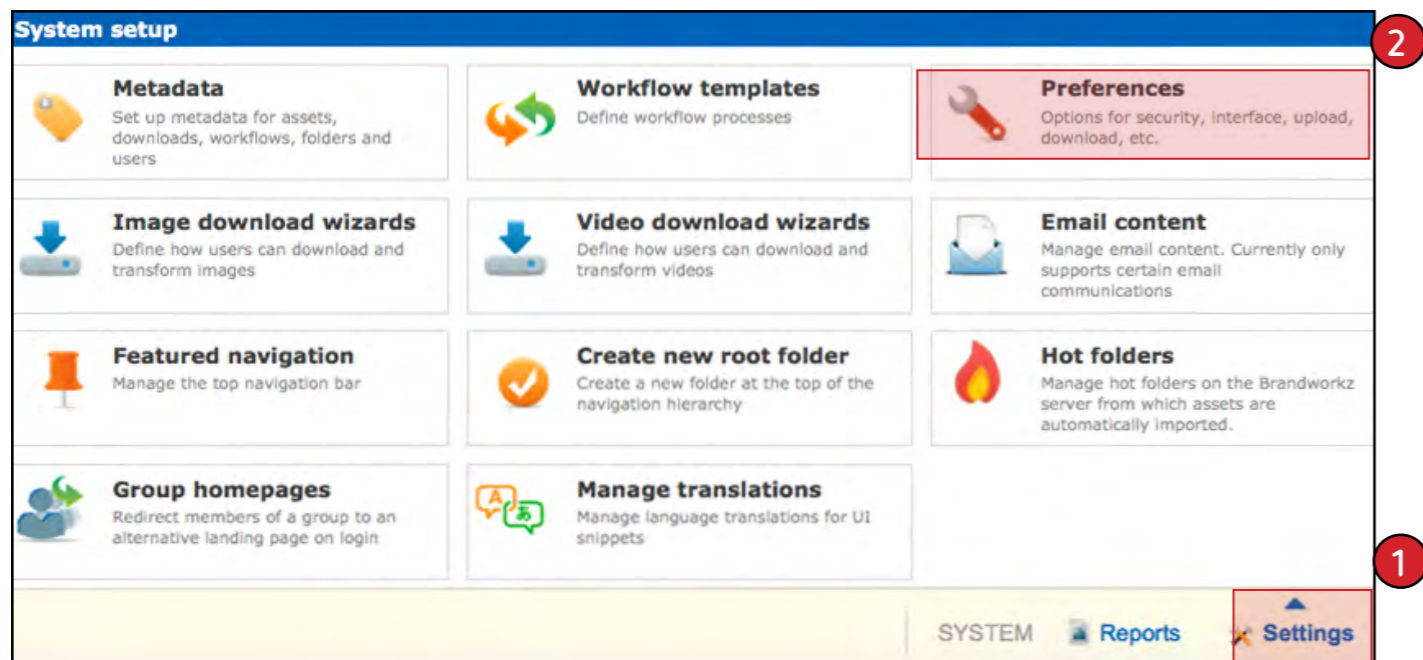
Preferences

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'.
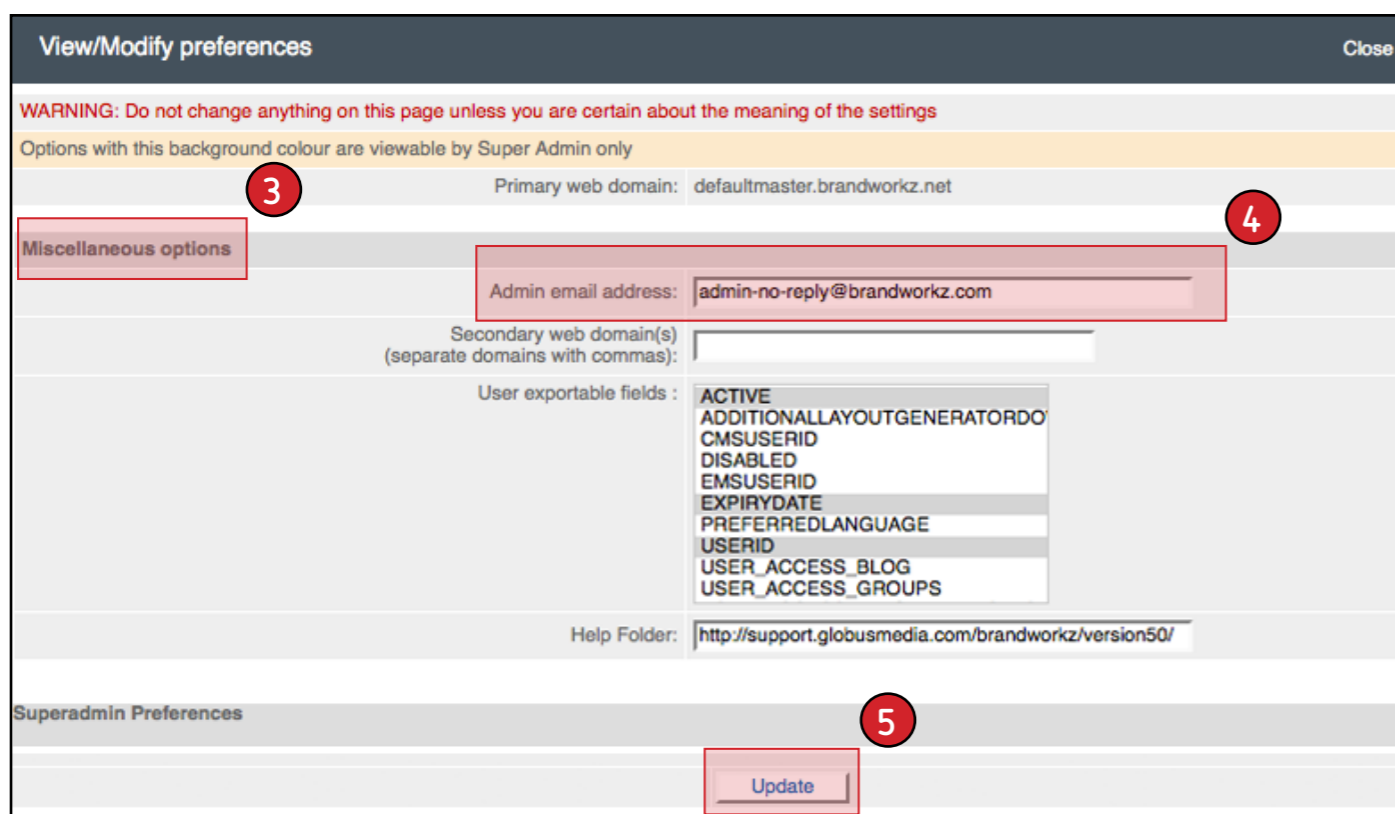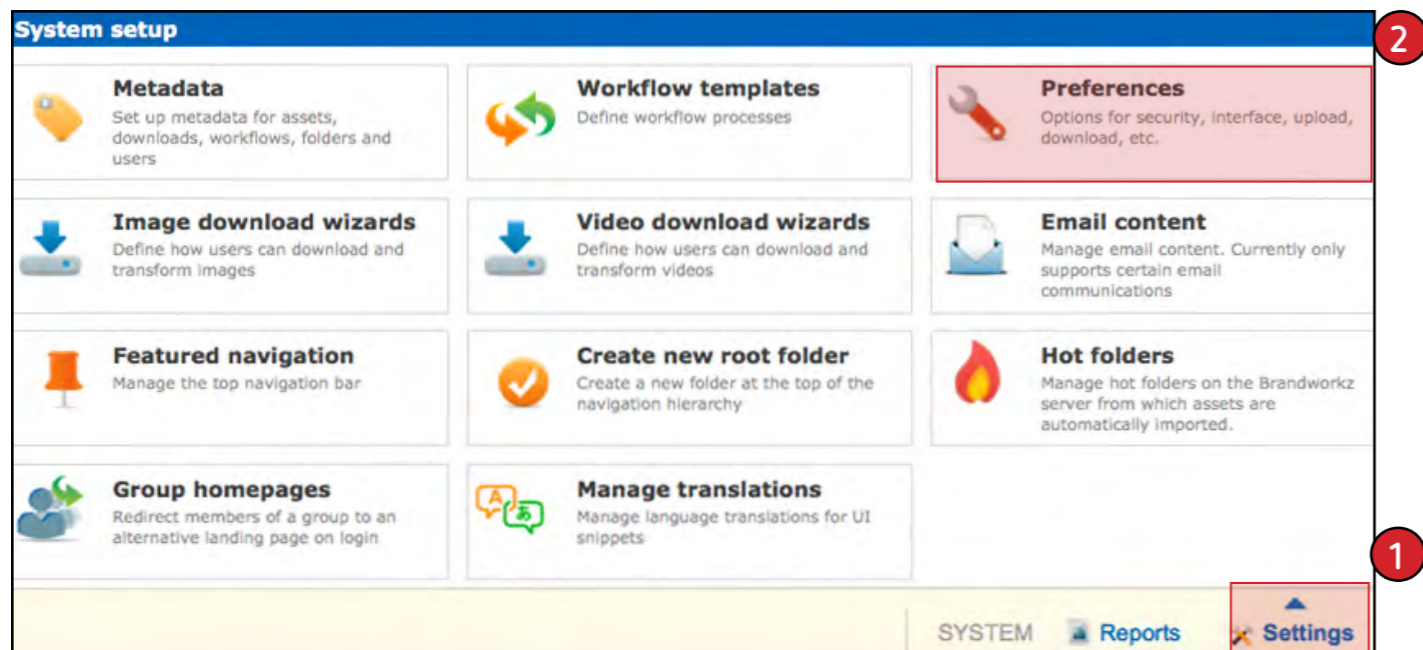
Set Export Fields

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'.

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.
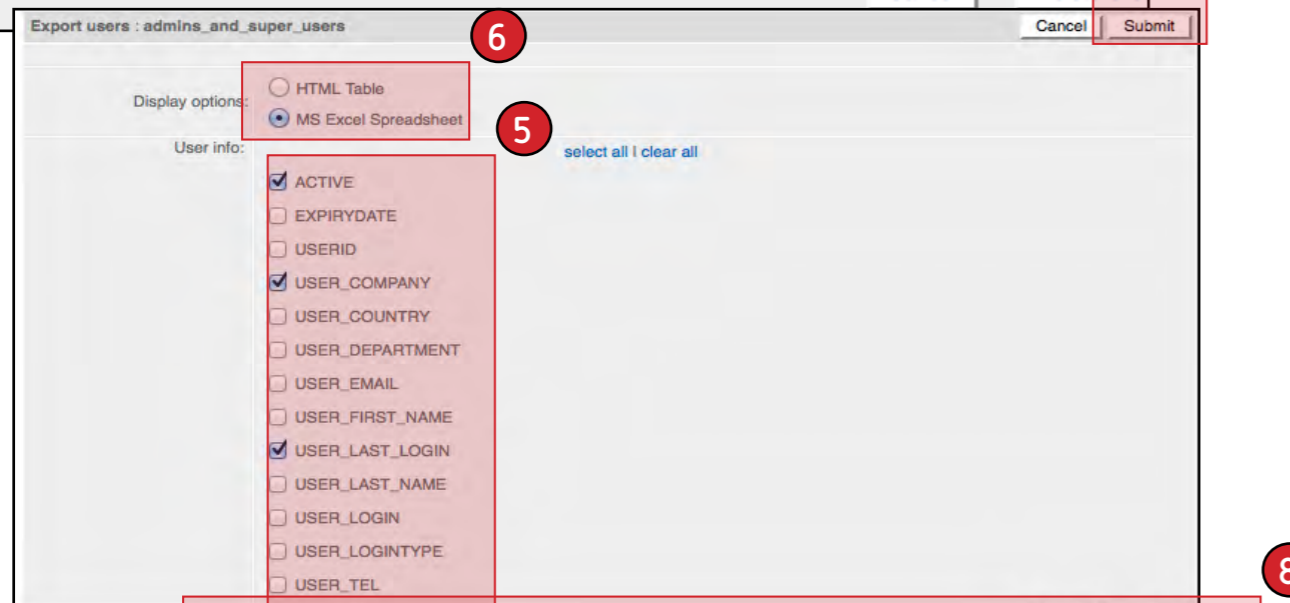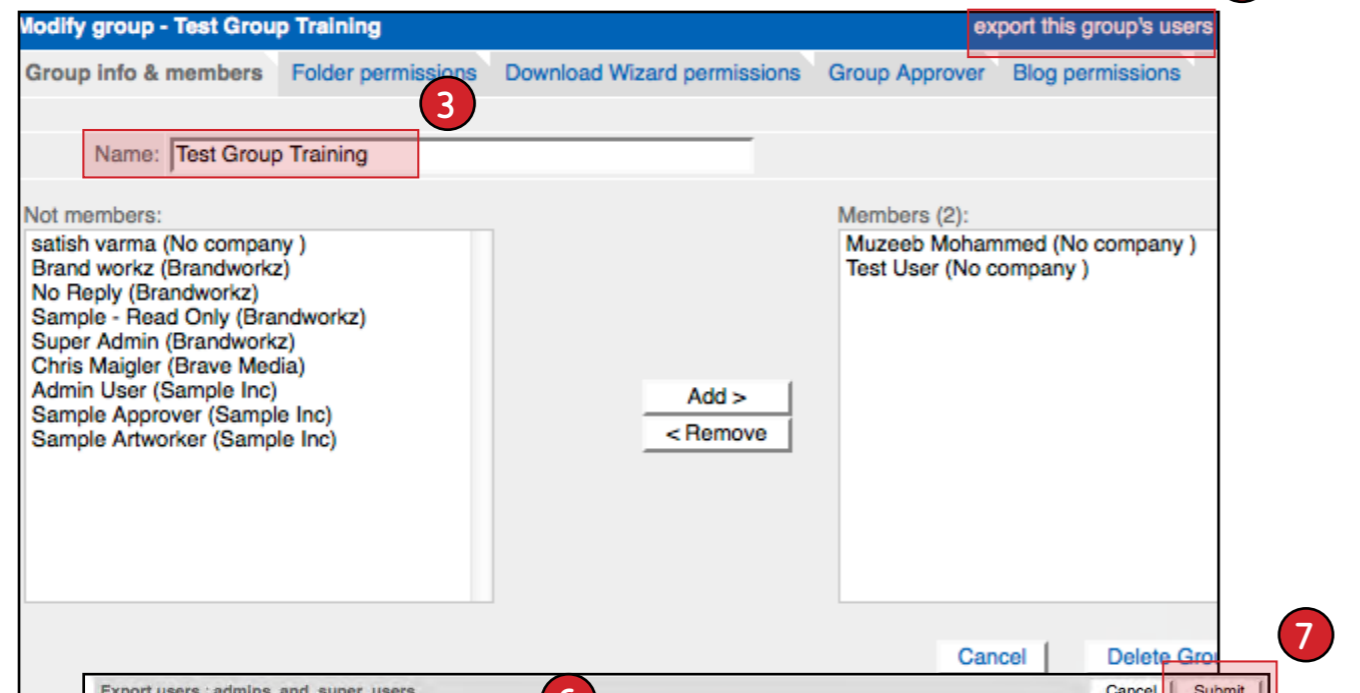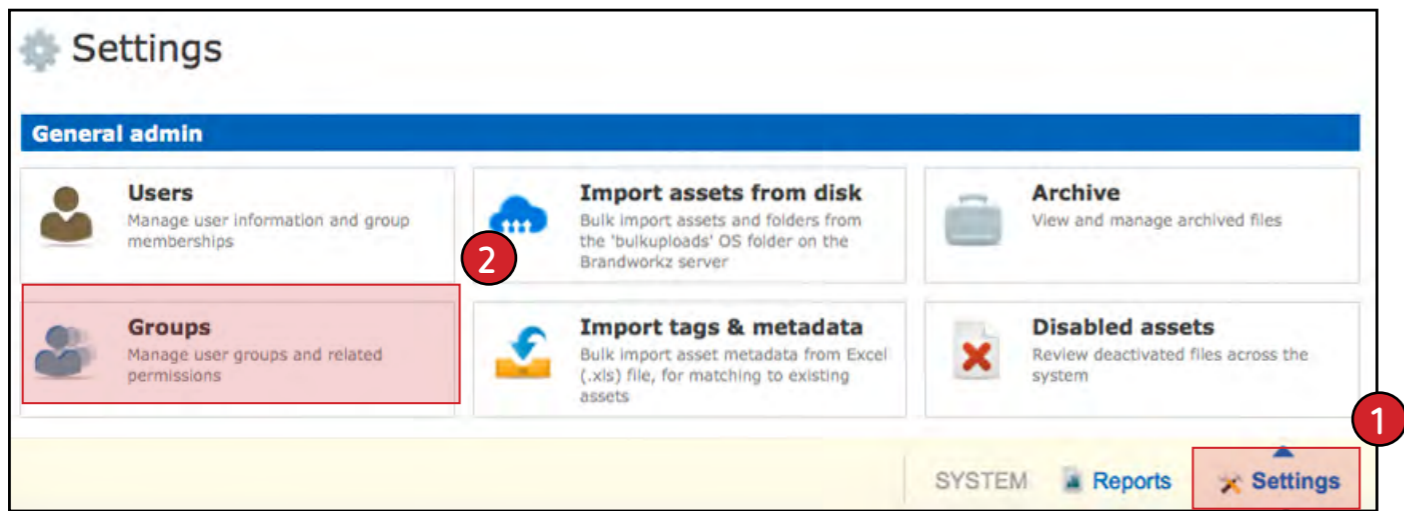
Exercise –
Export Group's Users

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.

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

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: New user account has been activated. From system admin to registrant

Language: English - United Kingdom

Subject: {sitename} Account activated

Plain content:
Dear {firstname} {lastname},
          Your {sitename} account has been activated. You can now login at http://defaultmaster.brandworkz.net using the username and password you supplied when you registered.

B *I* U | Font size | A | HTML

Content Html:
Dear {firstname} {lastname},
          Your {sitename} account has been activated. You can now login at http://defaultmaster.brandworkz.net using the username and password you supplied when you registered.

Path: p

Save

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