Quick Start Guide

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DigitalMedia QuickStart Guide, 03.17.02

This document provides an overview of release features. All information provided herein is subject to change without notice.

Contents

About DigitalMedia

DigitalMedia provides all the tools necessary to organize, share, and track your company's *digital assets*, regardless of where the assets are stored. Digital assets can be files, images, videos, audio files, animated graphics, or any other type of media that is stored electronically.

DigitalMedia streamlines the process for storing and accessing digital assets, allowing you to manage the lifecycle of an asset from the time it is created to the time it is archived. Permission control ensures assets are secure and only accessible by users with the proper permissions.

DigitalMedia helps you assign metadata to your assets, either manually or through artificial intelligence, which automatically assigns metadata to like assets by recognizing details like color, type of object, landscape, and more. The search capabilities enable users to quickly search for the assets they need.

Getting Started

This guide describes the features and functionality of DigitalMedia for end users.

Sign In and Out

The **Login** page is the first interaction with DigitalMedia and is where users provide their credentials to sign into the system. The **Login** page displays information about the product version and release.

The **Login** page is configurable, which allows for a unique brand experience for each organization. Users can also login using Google or Azure if their organization has those options configured. If these options are configured, additional buttons will appear on the Sign in page.

For the best browsing experience of DigitalMedia, Google Chrome is recommended. Other browsers are supported but may require configurations by your organization.

To sign in:

1. Open DigitalMedia in a browser using the URL that was provided by your organization.

2. Enter your username and password, then click **Sign In**. You will be redirected to the **Home** page.

Multi Factor Authentication

MFA (Multi Factor Authentication) provides an additional level of security and is enforced on the DigitalMedia Platform. MFA requires users to provide more than one method of authentication to verify the user's identity. Users will be

prompted during the login process to enter a code, which will be provided from whichever authentication application is installed on the user's mobile device.

To install MFA:

1. Install one of the following Two-Factor Authentication applications on your mobile device:

   - Duo Security

   - Google Authenticator

   - LastPass

   - Authy

   - Auth0

   - Ping Identity

   - RSA SecurID® Access

   - OneLogin

   - AuthPoint Multi-Factor Authentication

   - SecureAuth

2. Navigate to DigitalMedia using the URL provided by your organization.

3. Enter your username and password, then click **Sign In**.

4. Upon initial login, you will be prompted to change the password that was provided along with the URL. Enter a password in the **New Password** field, then click **Change**.

5. A QR code appears on the next screen. Scan the code using your mobile device's camera. Your account will automatically be registered in the Authy applications.

6. **AWSCognito** will now appear along with a security verification code. You will now be required to enter this code upon login, and will automatically be redirected to the DigitalMedia Platform.

User Interface Overview

Upon login, users are taken to the main overview page, referred to as the **Home** page.

The navigation bar appears on every page and enables users to switch between the pages and access other menus from one location. The navigation bar is always displayed, regardless of the page you are working with.
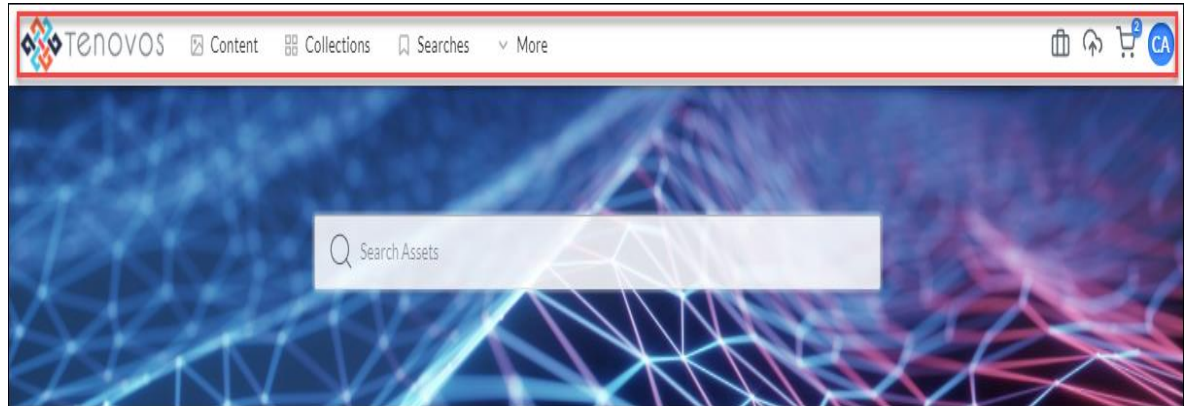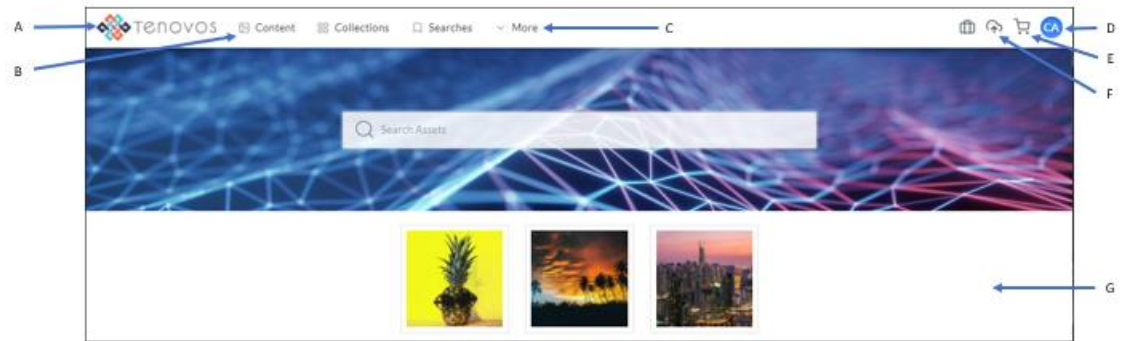

About the Home Page

The **Home** page is the main landing page that provides access to the functionality and tools users will need to work with in DigitalMedia. From the **Navigation Bar** on the **Home** page, users can access other pages, such as the **Content**, **Collections**, and **Search** pages. The **Home** page also provides access to the **Search Bar**, which helps users to quickly locate items using keywords or metadata.

- **Cart** - The Cart page displays the assets users have saved for download. See Cart.

- **Collections** - The Collections page displays all the Collections of assets that you have permission to see. See Collections.

- **Content Store** - The Content page displays all assets and asset previews that a user has permission to see. See **Error! Reference source not found.**.

- **Profile Menu** - From the Profile menu, users can modify settings that are specific to them. See User Preferences.

- **Search** - The Search field allows users to type in a keyword or other metadata to quickly locate content. See **Error! Reference source not found.**.

The default landing page is the **Home** page, but users can change this to the **Content** page from the **Profile** menu. See User Preferences.

KEY

A - **DigitalMedia** icon, links to the **Home** page

B - **Content**, **Collections**, and **Searches** pages

C - **More** menu, links to addition tools and contact information

D - **Profile** menu

E - **Cart** button

F - **Add File** button

G - **Asset Panel**

Browse Views

Assets are displayed in the **Asset Panel** on different pages throughout DigitalMedia. On some pages, you can change the *browse view* of assets or toggle between the different views as needed. If changing the browse view is allowed, the following **View** button appears in the **Search Bar**:

- ☰ **List View** - Displays assets in a vertical list that contains a small thumbnail of the asset, along with basic information about the item, such as its name, file size, and when it was created and last updated.
- ⊞ **Grid View** - Displays assets as large thumbnails, along with the name and when it was created.
- ⊟ **Mosaic View** - Displays assets as large thumbnails without displaying any metadata. In Mosaic View, you can see the file name by hovering over the image.

To switch between views, click the **View** button on the **Search Bar** until the browse view you want is displayed.

User Preferences

Users can update the default user settings to best suit their preferences. Users also logout of DigitalMedia from the **Profile** menu.

Depending on user and group permissions, users may not have the ability to modify every available user setting.

Landing Page

The default landing page is set to the **Home** page, but users can change this setting to display **Content Store** after they log in.

To change the default landing page:

1. Click the **Profile** menu, then select **User Preferences**.

2. Click **General**, then in the **UI Layout** section, select **Content Store** or **Home** from the **Landing Page** list.

3. Click **Save Changes**.

Upload Options

Users can define how metadata fields are displayed when uploading assets. Required fields will always display, regardless of the setting. If additional metadata fields exist but are not required, users can choose to show or hide them.

To change the upload settings:

1. Click the **Profile** menu, then select **User Preferences**.
2. Click **Upload**, then in the **Upload Options** section, slide the **Show Required Fields Only** button to **Yes** or **No.**
   o **Yes** shows only the required metadata fields.
   o **No** shows both required and optional metadata fields.
3. Click **Save Changes**.
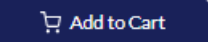
About Content Store

The **Content** page displays all assets that you have the permission to see. Like other pages in DigitalMedia, what you can see and do on the **Content** page is based on permissions.

Click the **Content** button on the navigation bar to access the **Content** page.

Cart

The Cart is a holding container for assets you use frequently and want stored in one location so you can quickly access them. The functions that can be performed on assets in a cart are the same as the **Content** page and elsewhere in DigitalMedia. You access the **Cart** page by clicking the **Cart** icon on the navigation bar. The number of assets in the cart is displayed along with the icon.

To add assets to the Cart, select individual or multiple assets, then click **Add to Cart** . A message displays notifying you confirming the items were added to the cart.

To remove assets from the cart, select individual or multiple assets on the **Cart** page, then click **Remove from Cart**.

> **Note:** Performing a search from the **Cart** page does not search for assets in the cart, the search is based on all items in the system that meet the specified search criteria.

Working with Assets

The operations you can perform depend on user permissions and the permissions assigned to the asset. The same operations can be performed on assets in all browse views.

Most operations on single items are performed using the **Tools** menu that displays when you hover over an asset.
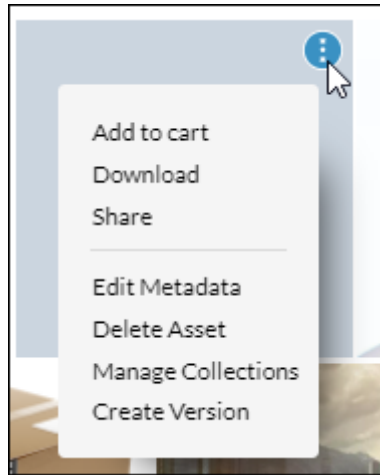
To perform actions on multiple items at once, you select the assets you want to make bulk changes to by clicking the **Select** icon ⊘ that appears when you hover over the asset. Once you select an item, the asset's **Tools** menu disappears and is replaced by the **Multi-Select Tool Bar**. The **Tools** menu is displayed within the **Multi-Select Tool Bar**.

The operations displayed on the toolbar and **Tools** menu depend on permissions, but generally include the following functionality:

- **Add to Cart**

- **Download**

- **Share**

- **Edit Metadata**

- **Delete Asset**

- **Manage Collections**

- **Create Version**

Select Assets

You select assets by clicking the **Select** icon that appears when you hover over the item. You can click the **Select** icon again to clear the selection. To select all items in the **Asset Panel**, click the **Select all** icon that is displayed on the **Multi-Select Toolbar**. Click the **Clear selection** icon to clear all selections.

Download Assets

To download a single asset, click its **Tools** menu, then click **Download**. Depending on the browser you are using, the original asset will be downloaded locally to your computer.

To download multiple assets, select all items you want to download, then click the **Download Selected** button .

If you download multiple assets at once, they will be downloaded locally as a .ZIP file.

Upload Assets

You can upload assets on the **Content** page and the **Collections** page. Uploading is a permission-based action and may not be available to all users.

Note: It is recommended that you upload similar assets together since security templates and metadata are applied to one or all assets during an upload. Application of metadata is extremely important when uploading assets. Artificial Intelligence (AI) may be configured and applied to assets on upload but cannot replace the value of user entered metadata.

Security Template: Defines what type of user access is applied to the asset(s) and is based on permissions.

Metadata Template: A predefined template of attributes that are grouped together and applied to the asset.

To upload assets:

1. On the **Collections** or **Content** page, click the **Add Files** button on the **Navigation Bar**.

2. On the **Asset Ingestion** page, click the **Browse** button in the **Assets** window to locate the files you want added, or drag files from your computer and drop them into the **Assets** window.

3. To add the assets to an existing Collection, select an option from the **Add to Collection** dropdown list.

4. Select an option from the **Select Security Template** dropdown list.

5. To associate the assets with an existing project, click the **Add** icon ⊕ in the **Associate Project** field, browse to a Project in the **Add Project** window, then click **Associate**.

6. To apply a set of existing metadata to the assets, select an option in the **Select Metadata Template** dropdown list. If you want to provide additional details, toggle off the **Show Required only** button, then enter the necessary information.

7. Click **Continue**

If an asset is in the process of uploading, a placeholder preview image may be viewable until the asset is completely processed within the system.

Delete Assets

Assets can be deleted from the **Content** page, **Search Results**, **Cart**, **Collections**, and the **Asset Details** page.

Users can delete assets if they have permission to do so; however, performing a delete does not remove the asset from the system, it only deletes the asset from that user's view. Administrators can see the deleted assets and perform the formal deletion from the system.

To delete an asset:

- Click the asset's **Tools** menu, click **Delete Asset**, then click **Yes, Delete** in the confirmation dialog.

To delete multiple assets:

1. Select each asset you want to delete.

2. Click **Delete Assets** on the **Tools** menu on the **Multi-Select Toolbar**, then click **Yes, Delete** in the confirmation dialog.

Activity Notification Manager

When actions are performed on assets, such as upload, download, delete, or edit metadata, the Activity Notification Manager is displayed. The Activity Notification Manager provides the user with a progress notification, informs users when an operation is complete, and provides details about actions that may need to be taken. Users can continue to work while other operations are in progress. Multiple operations can be processed at the same time; a second notification window will be displayed when multiple operations are being processed.

Working with Asset Metadata

Any items stored in DigitalMedia, such as images, videos, or other media files are referred to as *assets*. Assets in DigitalMedia contain *metadata*, which is simply data that provides information about other data associated with an asset. Metadata is the key to understanding and finding assets within the system because it enables searches to locate assets that have specified attributes (or pieces of metadata) assigned to that item. For example, users may be looking for all items that are related to sports. If metadata is applied properly, then a search for "sports" should return any item that has the metadata attribute "sports" applied.

Metadata is read only and may be displayed as text, tables, numeric and icons. There are three types of *Metadata Groups*, which is a set of metadata that is grouped together and can be assigned at once to an asset or set of assets.

Security Templates: Defines the set of metadata that is assigned to items when they are added to DigitalMedia. Users must have access at least one of the security templates assigned to an asset to be allowed to view it.

Custom Metadata Groups: Groups of metadata and attributes that are defined by the administrator.

Technical Information: XMP/XIFF properties that are applied to the asset when they are uploaded or prior to upload.

To view an asset's metadata, click the asset to display the **Asset Details** page.

Edit Metadata

Metadata can be edited on single assets or as a *bulk edit*, which is editing multiple assets at one time. A bulk edit applies the metadata you choose to every asset that you have selected for a bulk edit. When you perform a bulk edit that includes assets with existing metadata, *all* existing metadata will be overwritten by the changes you make. When you edit a single asset, existing metadata displays and you can modify the attributes individually.

Custom metadata fields can be edited by users that have permission to edit metadata. Not all users will have the ability to make changes.

When you edit metadata on assets, whether it is a single edit or bulk edit, the metadata attributes that are available for editing depend on which **Metadata Template** is selected. When you change the **Metadata Template**, existing data for attributes that are not associated with the new template will be removed.

The following metadata types are available:

- **Text fields**: Only alphanumeric characters are allowed. You must type directly into the field. For example, sort orders, descriptions, and names. Text fields usually have maximum character limits.

- **Single Select Dropdown**: Single select dropdown lists contain specified options to choose from. You can only select one option. The option you select is displayed in the field.

- **Multi-select Dropdown**: Multi-select dropdown lists contain specified options to choose from. You can select multiple options, which are populated in the metadata field as you select them.
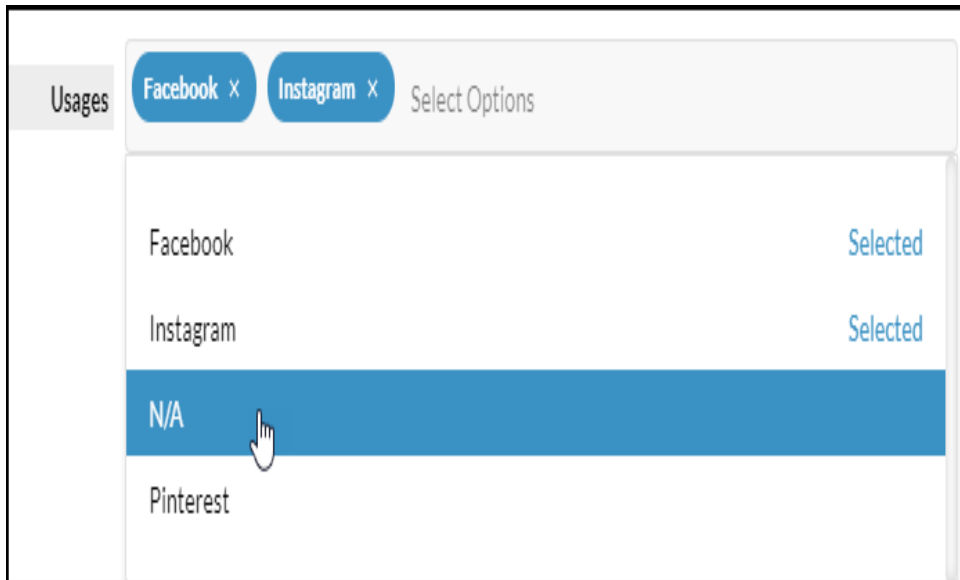
To edit metadata on a single item:

1. Find the asset you want changed, click its **Menu** icon ⓘ, then click **Edit Metadata**.
2. In the **Edit Metadata** dialog, make the necessary changes to the metadata, then click **Continue**.

Notes: The fields that display in the Edit dialog are populated from the Metadata Template that was selected at the time of upload. If you change the Metadata Template, the metadata fields that are displayed may change.

Edits are not applied until you click **Continue. I**f you use the **Arrow** buttons ← → to browse to other assets after you made changes to an assets metadata, that metadata will not be updated unless you first click **Continue**.

Bulk Edit Metadata

Bulk edits can be performed from most locations in DigitalMedia including the **Content** page, Collections, Search Results, and the Cart.

Note: If assets with different Metadata Templates are selected, the Bulk Edit option will not be available.

To perform a bulk edit:

1. Do one of the following:

   - From the Content Store, a Collection, or a Search Result, select each asset you want to apply a bulk change to, click the **Menu** icon ⓘ in the **Navigation Bar**, then click **Bulk Edit**.

   - From the Cart, select each item you want to apply a bulk change to, then click the **Bulk Edit** button.

2. In the **Bulk Edit** dialog, make the necessary changes to the metadata, then click **Continue**.

Sharing Assets

Assets can be shared with users who have access to the system and also have the proper permissions to view the asset. When you share an item with another internal user, it will be emailed as a link the user can click to go directly to the item. You can share items from most locations in DigitalMedia, including browse views, Collections, Search Results, and the **Asset Details** page. For sharing individual items, you will use the **Share** option from an asset's **Tools** menu. For sharing multiple items at once, you first select them and use the

Share button ⁢ Share on the **Navigation Bar**, or the **Share** button that displays directly on the page if you are on the **Asset Details** page.

Once you click the **Share** option, regardless of location, a **Share** dialog window appears where you add one or more recipients and a note.

Note: To share assets with external users, you must use the Transformations feature. See Transformations.

Transformations

Transformations are performed on the original asset on-the-fly and provide users the ability to download a .ZIP file of assets as a local copy or send it as an email link. This allows users to share assets with external individuals who may not have access to the system, while changing the resolution of the asset at the same time.

Transformations are available for image and video file types, and are controlled by group permissions. If a format is not available to you, contact your administrator.

The Email link expires in seven (7) days. Email templates are configured by the administrator.
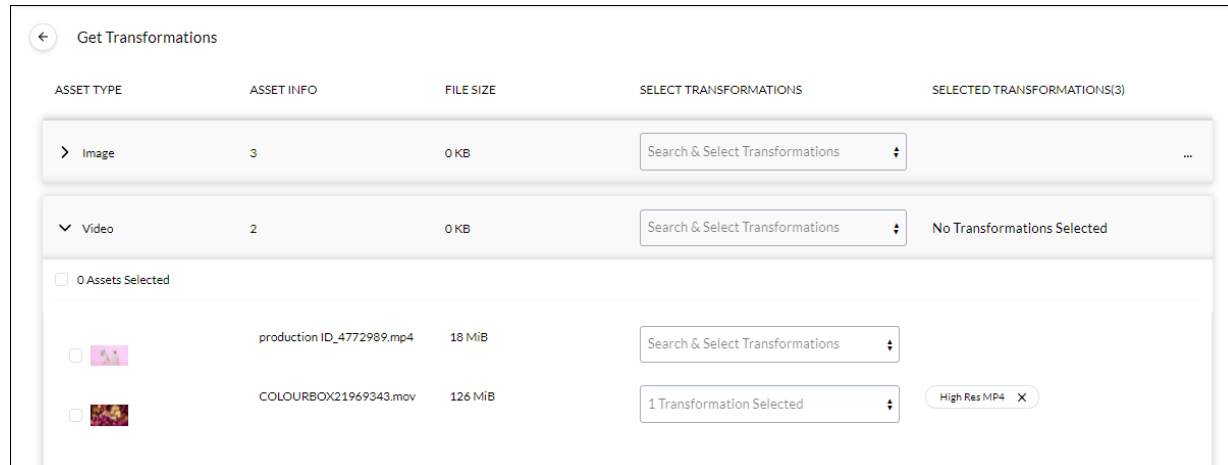
To share assets through Transformation:

1. From a browse view, select each asset that you want to include in the transformation, then click the **Transformations** button.

2. On the **Get Transformations** page, expand the **Asset Type** sections to view the assets, then select the check box for each asset and choose the type of transformation in the **Select Transformations** column.

3. When all assets are selected and ready for transformation, click **Share.**

4. In the **Share Transformations** dialog, enter a recipient(s) email address and a name for the .ZIP file in the appropriate fields, then click **Share**.

5. The notification dialog informs you when the email link was sent.

To download assets through Transformation:

1. From a browse view, select each asset that you want to include in the transformation, then click the **Transformations** button.
2. On the **Get Transformations** page, expand the **Asset Type** sections to view the assets, select the check box for each asset, then choose the type of transformation from the dropdown list in the **Select Transformations** column.
3. When all assets are selected and ready for transformation, click **Download**, then click **Download** again in the **Download Transformations** dialog.
4. The notification dialog informs you when the download is complete and ready to be downloaded as a local copy.

Note: If a Transformation is not available for selected assets, a notification will display informing you of the number of assets that were not included. These assets will not be displayed on the **Get Transformations page.**

Managing Asset Relationships

You can create *Relationships* between assets, which means you define one asset as the *Parent*, then link other assets to that parent asset. The linked assets are referred to as *Child Assets* or *Derivatives*.

Asset Relationship Terminology:

- **Relationship** - The term used when an asset is linked to another asset. In some cases, relationships will be automated for compound assets such as Adobe InDesign with linked assets. Manual relationships are defined by users based on a relationship category.

- **Parent** - The asset that is defined first as the top-level asset. It can have a single secondary asset or multiple secondary assets linked to it.

- **Child** - The secondary asset which can have many parent relationships or links and may be a parent itself. A child in Content Store, is a relationship that is not derived by the Parent but related for reason. **Example:** A campaign image utilizes three additional images to create the campaign image. A user might define the campaign image as the *parent* and define the other three images as *children.* The relationships are displayed on the **Asset Details** page, providing users with 360 views of the asset.

- **Derivative** – Similar to a child asset but is a byproduct of the parent asset and became its own asset within the system. **Example:** An image is downloaded from the system. The image is cropped to only use a close up of the face of the image. The cropped image is ingested into the system as a new asset. The original asset can be related to the cropped image as a derivative, linking them together to show that one was derived from the other.

View Relationships

If an asset has a relationship with other assets, the related assets will display on the **Relationships** tab on the **Asset Details** page. You access the **Asset Details** page by clicking the asset. Each related asset will be identified as *Child*, *Parent*, or *Derivative*. Clicking the related assets will display the details for that asset.

Note: The **Relationships** tab does not appear for assets with no relationships.

Relationship results can be filtered and sorted to make searching for assets with specific types of relationships easier. The **Filters** dropdown list allows you to narrow down the results by relationship type (Child, Derivative, Parent, Placed Graphic), last asset added, or alphabetically.
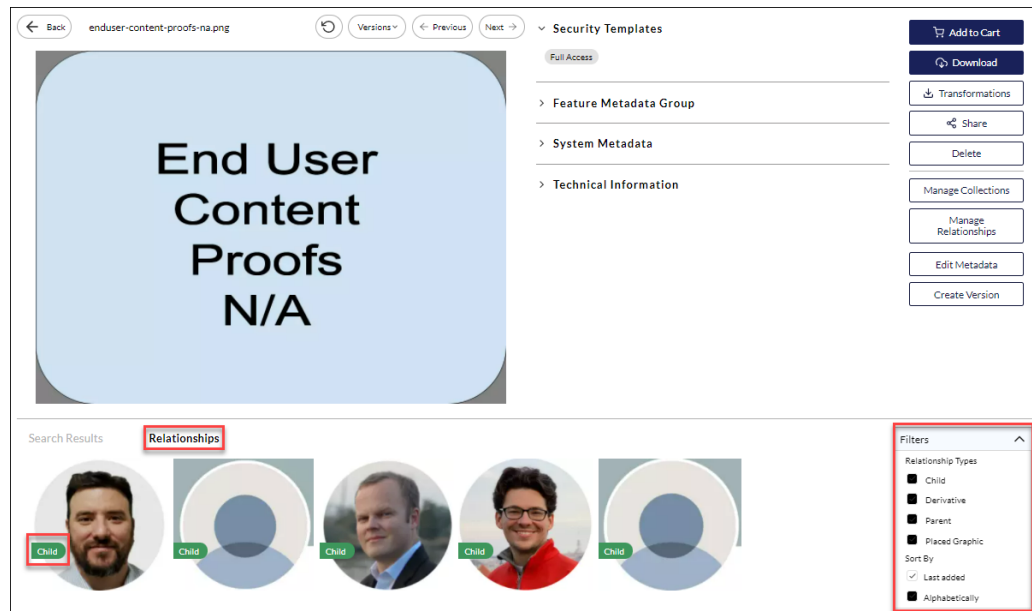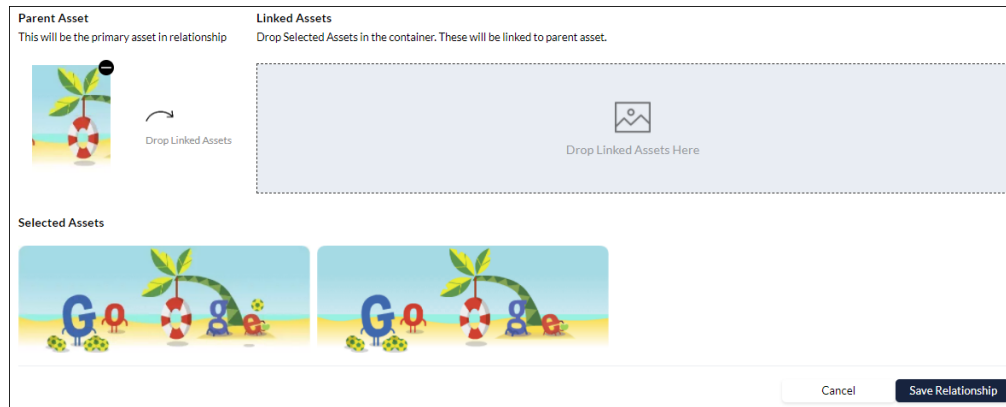
Manage Relationships

Before you begin the process of creating relationships between assets, you should know which assets will be included in the relationship you are creating to make the process easier. You can always add additional relationships later or modify and delete existing ones.

Note: You can manage the relationships for assets from any of the browse views in Content Store or from search results.

To create a Relationship between assets:

1. From browse view, click the **Select button** ✓ for each asset you want to include in the relationship**.**

2. Click the **Tools** menu ⋮ on the **Navigation Bar**, then click **Manage Relationships.**

3. On the **Relationships** page, click to select the item you want specified as the parent, then drag and drop it into the **Parent Asset** area.

4. Once a parent asset is specified, click to select the items you want linked to the parent, then drag and drop them into the **Linked Assets** area.

5. To change the relationship between the parent and other assets, click the dropdown list ⌄ for a selected item, then choose the type of relationship you want to set. Assets are linked as the Child type by default.

6. Click **Save Relationship**, then click **Confirm** in the **Save** dialog window.

To link additional assets to an existing relationship:

1. Click an asset to open the **Asset Details** page, then click the **Manage Relationships** button.
2. In the **Unlinked Assets** area of the **Relationships** page, click the **Select More Assets** button.
3. From the browse view, select each asset you want to link, click the **More** menu on the **Navigation Bar**, then choose **Manage Relationships**.
4. The selected assets will appear in the **Unlinked Assets** area. Select the ones you want to link, then drag and drop them in the **Linked Assets** area.
5. Click **Edit Relationship**, then click **Confirm** in the **Save** dialog window.

To remove assets from a relationship:

1. Click an asset, then click the **Manage Relationships** button.
2. Click the **Remove** button ⊖ for each asset you want to take out of the relationship, click **Edit Relationship**, then click **Confirm** in the **Save** dialog window.

If you remove every asset from the **Linked Asset** area and save the changes, the relationship will automatically be deleted.

To share assets with external users, you must use the Transformations feature. See Transformations.

To share assets:

1. From any browse view in the Content Store, Collection or Search Result, select each item you want to share, then click the **Share** button.
2. In the **Share Assets** dialog, type the first few letters of the name of the person you are sharing with

Using Collections

Collections

Collections are made up of several individual assets that you or another user selected and *collected* into one group.

The **Collections** page contains public and private Collections. Collections are controlled by user group permissions. Private Collections, or Collections that you created, are displayed on the **Collections** page. Public Collections appear only if you have the proper permission.

The **Collections** page has an **Asset Panel** that is similar to other DigitalMedia pages; however, Collections do not have the same functionality available as assets in other locations.

You open a Collection by clicking it. Collections can be opened from the **Collections** page, the Cart, or by accessing the **Manage Collections** window an asset's **Tools** menu. Once you open a Collection, available functions for each asset in the Collection will display on the asset's **Tools** menu.

Note: Collections are not search-based, they are assets that have been selected individually. If you require a dynamic collection that is based on search criteria, use the saved search functionality instead. See Searching Assets.

To access the Manage Collections window:

- From the **Content** page, search results, or from the Cart, click an asset's **Tools** menu, then select **Manage Collections**.

To create a Collection:

1. From any browse view on the **Content** page, the Cart, or on the **Collections** page, select the assets you want to collect, then click **Manage Collections** on the **Tools** menu in the navigation bar.
2. In the **Manage Collections** dialog, click the **Create a New Collection** tab, then type a name for it in the **Collection name** field.
3. Choose **Private** or **Shared** from the dropdown list.
4. Choose an option from the **Secure Collections** list.
5. If the Collection is shared, choose a permissions level from the **Select Security Template Options** dropdown list.
6. Choose an option from the **Collection Priority** dropdown list, then click **Create Collection**.

To add assets to an existing Collection:

1. From any browse view, select the assets you want to add, then click **Manage Collections** on the **Tools** menu.
2. In the **Manage Collections** dialog, then click the **Manage Current Collections** tab.

3. Select the radio button for a Collection, then click the **Select** icon ⊘ to confirm. Repeat the process to add those same assets to other Collections.
4. Close the dialog window.

Note: If you want to remove assets from a Collection, you can follow the same process as above. If the Collection contains those assets, a message displays asking if you want to remove those assets. Click

the **Select** icon ⊘ to remove.

Searching Assets

Searches can be performed in different ways in DigitalMedia. Users can use the search options independently or with a combination of options.

Assets are displayed only if a user has permission to see it. The functions a user can perform on the asset are also based on permissions.

Simple Search

A **Search Bar** is displayed on all pages where assets are stored: **Content**, **Home**, and **Collections** pages. The **Search** bar enables users to type in key words to quickly locate items. The items that are searched depend on what page you are on. A search from the **Collections** page only searches for collections. A search on the **Home** and **Content** pages searches for assets within that location.

To perform a simple search:

1. From any page where the **Search Bar** appears, type in a keyword, then press **Enter**.
2. To further narrow down the search results, type additional keywords or remove them until you have useful search results.
3. To clear search terms, click the keyword to delete the individual term or click the **Clear** button in the **Search Bar** to delete all search terms. Clicking the Clear button also clears any filters that were applied.

> **TIPS:** As you begin to type keywords into the **Search** bar, suggested terms appear in the drop-down list. Click it to add it to the **Search** bar.
>
> If you want to search using a full sentence, add quotation marks around the sentence before pressing **ENTER** otherwise each term will be searched separately.
>
> If the search returned useful results with the keywords you used and you will perform the same search again, you can save it to your **Search** page. This enables you to quickly access the search results without entering keywords or applying filters.

Search Query Operators

Search query operators can be used in with keywords or phrases to narrow down search results. The following operators can be applied:

- **Simple Search**
    - Type each keyword or search term. The **AND** operator is automatically applied. (Example search criteria: *Red Blue Hat*)
    - Search results include every asset, from all searchable metadata, that contains all search terms in their metadata: Red and Blue and Hat.
- **Complete sentence search**
    - Type complete sentences inside quotation marks. (Example search criteria: "Red Blue Hat")
    - Search results include all assets that have *Red Blue Hat* in the metadata.
- **Inclusion**
    - Inclusion allows for searches that include a filter. (Example search criteria: Hat +Blue)
    - Search results include all assets that have *Hat* and also have *Blue* in the metadata.
- **Exclusion**
    - Exclusion allows for searches that exclude a filter. (Example search criteria: Hat -Blue)
    - Search results included all assets that have *Hat* in the metadata, but exclude assets that have *Blue* in the metadata.

NOTE: When including or excluding terms, the operator (- or +) must immediately precede the search term (without a space), as shown in the examples above.

Filtered Search

Search Filters can be used to narrow down the list of assets. Filter options are automatically generated based on the metadata defined in the system. The Filtered Search enables users to quickly drill down to specific assets by selecting available metadata options in the **Filters** panel.

NOTE: A simple search of keywords can be used in conjunction with the standard filters to further refine results.

Standard Filters
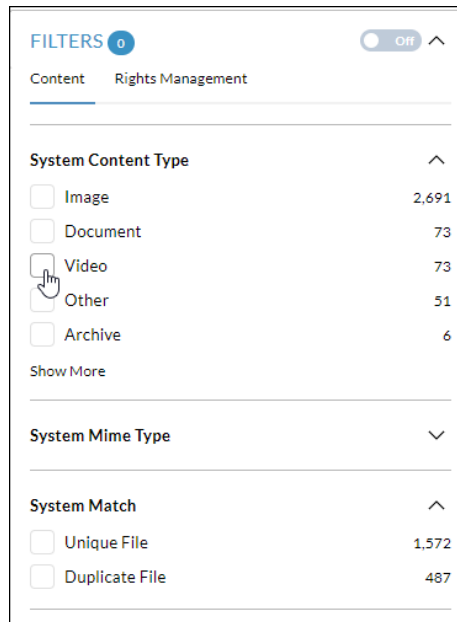
To apply standard filters:

1. Click the **Expand** icon ⌄ to open the **Filters** panel.
2. Navigate to the section that contains the metadata to be included in the search results, expand the section, then select the checkbox for each piece of metadata you want to include.

    Note: You can include a simple search in your filtered results by entering keywords into the **Search** bar.

Enhanced Filters

The Enhanced Filters option enables users to include **AND/OR** statements in the search.

By default, when filters are selected, AND is implied in the search criteria.

EXAMPLE

The desired search result is to find all items that are images of the PNG type. When **AND** filters are used, the results are immediately narrowed down to files that are images of the PNG type. In the example below, there are 245 items displayed in the **Asset** panel.
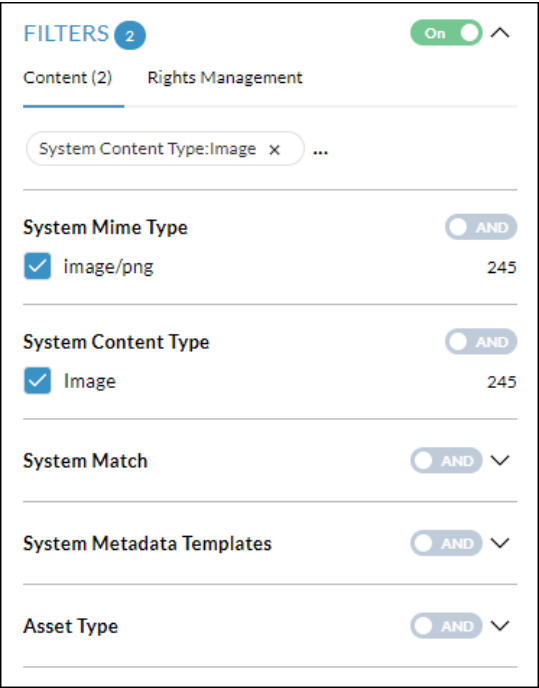
The desired search result is to now find all items that are images, but can be PNG, JPEG, or GIF types, so the **OR** attribute is applied to the **System Mime Type** filter. In this example, there are 2,574 items displayed in the **Asset** panel.
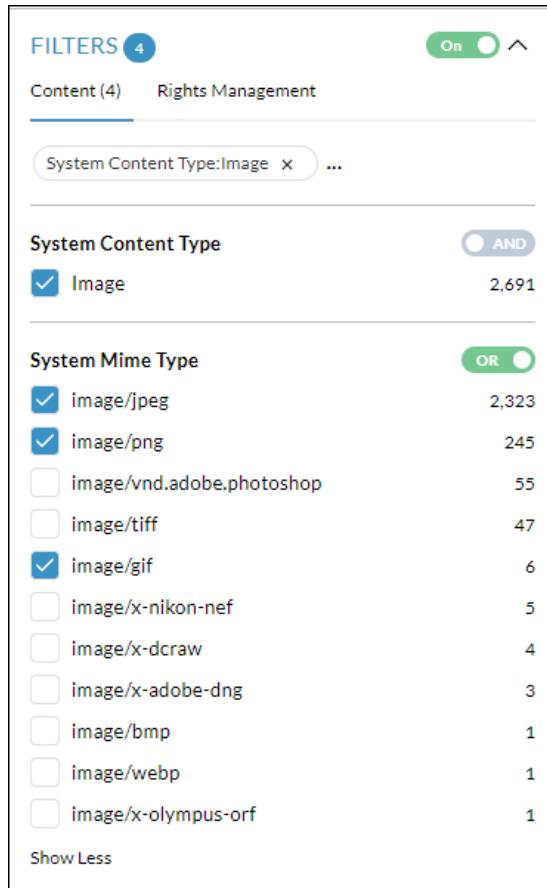
To apply enhanced filters:

1. Click the **Expand** icon ⌄ to open the **Filters** panel, then slide the **Enhanced Filter** button to the **On** position.
2. Navigate to the section that contains the metadata to be included in the search results.
3. If you are including more than one type of metadata in the search, slide the **Enhanced Filter** button ⊙ to the **OR** position.
4. Select each type of metadata you want included in the search results.

    TIP: You can include a simple search in your filtered results by entering keywords into the Search bar.

Search Results

Search results are automatically displayed when you use the **Search Bar** (simple search) to enter keywords and filtering options. Whether you use a simple search from the **Home** page or a saved search, the results display in the Content

Store. Once the search results are displayed, there are several functions available to make viewing the results easier.

Search results can be displayed in the following ways:

- ☰ **List View** - Displays assets in a vertical list that contains a small thumbnail of the asset, along with basic information about the item, such as its name, file size, and when it was created and last updated.
- ⊞ **Grid View** - Displays assets as large thumbnails, along with the name and when it was created.
- ⊟ **Mosaic View** - Displays assets as large thumbnails without displaying any metadata. In Mosaic View, you can see the file name by hovering over the image.

To switch between views, click the **View** button on the **Search Bar** until the view you want is displayed.

A preview image is displayed for all types of assets, regardless of the view selection. Asset types and associated preview images are as follows:

- **Images -** Preview of the image. The thumbnail size differs between the various Views.

- **Videos** - Preview of a key frame of the video. Video types contain a **Video** button ▷ to open and play the video.

- **Placeholder** - An asset that is in the process of generating but not yet complete.

- **Generic** - Assets that do not have a previewable image, such as documents, will display the system generated image ⬜.

Sort Search Results

You can sort search results based on any of the available metadata fields (for example, create date, last updated, asset type, etc). By default, search results list assets in order of creation date, starting with the most recent and sorting in descending order.

To sort Search Results:

Click the **Sort** button on the **Search Bar**, then choose one of the options from the **Sort By** list.

Saved Searches

If a search query returns the desired results and will be used again, the search query should be saved for future use.

Note: When you save a search, you are saving the filters and keywords that are used in the search. Search results are returned based on the content available and permissions at the time the search performed. Since content can change, the search results may vary each time the saved search is viewed.

When a search query is saved, it will be added to the **Searches** page, which lists all of searches you have saved and any searches that have been shared with you. You can access the **Search** page by clicking the **Searches**

button ☐ Searches   on the **Navigation Bar**.

To save a search query:

1. Once you entered your search and filter criteria and the results are displayed, click the **Save Search** button ⊟ in the **Search Bar**.

2. In the **Create Saved Search** window, type a name for the search, then do one of the following:

   - To save the search query for your own personal use, select the **Private** button.

   - To share the search query with other groups of users, select the **Share** button, then select an option from the **Select Security Template** list.

3. Click **Save**.

Note: Special characters are not allowed in the names of search queries, with the exception of periods and hyphens.

Searches Page

The **Searches** page is divided into two tabs. The **Searches I Created** tab contains the private and shared searches that you created. The **Searches Shared with Me** tab contains only those searches that others have shared with you.

Both tabs display the names of the searches, along with the date the search was originally created. On the **Searches I Created** tab, you will also be able to see which of the searches you created as private or those you chose to share.

All searches, regardless of whether they are private or shared, display a **View Results** button. Click the button to run the search again.

Note: The search is executed in real-time, which means the results of the search query are based on the assigned permissions and assets that are in the system at the time you run the search.

For searches that you created, you can use the functions in the **Actions** area to copy a link, delete a saved search, or edit the name and security template. You can delete any saved searches, regardless of whether they are private or shared, as long as they were created by you.

Click the **Copy link to clipboard** button 🖉 to copy a link that goes directly to the search results. This link can be shared, as long as the users you are sharing with have permission to view the search results.

To delete a saved search:

1. On the **Searches** page, locate the search you no longer require, then click the **Delete search** button 🗑 in the **Actions** column.
2. In the confirmation window, click **Yes, Delete**.

To modify the name of a search or change the Security Template assignment:

1. On the **Searches** page, locate the search you want to change, then click the **Edit the name & security** button .

2. In the **Update Saved Search** window, enter a new name for the Security Template, select new or remove existing Security Templates in the **Select Security Template** field, then click **Save**.

> **Notes:** This option only applies to searches created by you that are also shared. The Security Template is a set of permissions. When a Security Template is assigned to a shared search, it controls which users and groups can view the search results.
>
> The **Edit** button is displayed for searches that you have permission to change. The button will not display for searches that you do not have permission to modify.