CELUM Content

Advanced UI and Nova UI User Guide

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Nova UI

What's New?

In this topic, we provide a list of new features and improvements in the CELUM Content browser application in each release.

What's new in CELUM Content 24.7?

The latest CELUM Content release is a testament to our commitment to providing a seamless, efficient user experience across the CELUM platform.

User Management via Cloud

If enabled, the User Management via Cloud allows you to log into CELUM Content with your CELUM Cloud user and switch seamlessly between Content and the other CELUM services for which your organisation has a subscription.

Simply log in using your CELUM Cloud Account credentials via the **"CELUM Cloud login" function on the login page**. Your organisation's administrator will take the necessary steps to enable this for you.

If the User Management via Cloud is enabled, the **manual "Connect to Cloud account" function** in the user settings menu is not available anymore, because manual connection is no longer necessary.

Improvements for the Similarity Search

- The Similarity Search feature is now governed by a **subscription in CELUM Cloud Account**. To continue using it, please contact the CELUM Cloud organisation's manager to take care of the subscription process.
- **Fine-tune the results of the Similarity Search**: With the new **similarity threshold**, you can set the minimum degree of similarity between the current asset and the similar assets which the Similarity Search returns. An easy-to-use slider enables you to adjust the percentage of similarity to find more (coarser matching) or fewer (closer matching) assets.

Quality-of-life improvements that make your work easier

- **Easier switching between assets**: You can now effortlessly switch back and forth between assets in the current collection or search results **on every tab** of the **detail view**. Either use the left/right arrow keys on your keyboard or the previous-/next-buttons on the small preview.
- **Rename saved search- or filter-configurations**: You can rename your saved **search-configurations** or **filter-configurations** in both the "Save filter settings" and "Load filter settings" dialog if the initially chosen name no longer reflects what the saved configuration represents. This feature is especially useful when the saved search in question is used in a Library.

What's new in CELUM Content 24.4?

Accelerate your content flows with lightbox

From now on, you can use Nova's lightbox to create ad-hoc collections where you can link, edit, download, share, and create relations between assets from arbitrary parent collections. You can find detailed instructions for the lightbox in **Work with assets**.

- The lightbox is available in both Explore View and Advanced Search.
- You can add assets either via drag-and-drop or via the context menu . Which actions are available for these assets inside the lightbox depends on your permissions in their respective parent collections.
- **The Nova lightbox is independent from the Advanced UI clipboard** – no clipboard content from the Advanced UI will be transferred to the Nova lightbox, and vice versa.

Quality-of-life improvements that make your work easier

- As a power-user with super-administrator permissions, you can now **manually recreate asset previews**. Now you do not need to switch to Advanced UI for this task anymore.
- **Search in collections - for collections**: You can now use the "Search in collections" widget in the Advanced Search also to search for collections that have a particular parent collection.
- **Find assets by version information**: Two new widgets "Version created by" and "Version date" enable you to find the latest changes for assets quickly and easily.

What's new in CELUM Content 23.12?

Compound objects have got a major functionality boost

- To save time and effort, you can now automatically create placeholder assets for every missing element inside a compound object. Simply use the new "Create missing elements" action to create the placeholders, prepare them for your purposes, and upload a binary version once you're satisfied. You can find detailed instructions in the "**Edit compound information**" article.
- For **compound types**, you now have an additional option to determine a specific **asset validation field** with a specific value for asset validity as another requirement for completeness of compound objects.
- Additionally, we made several smaller usability improvements for compound objects as well:
  - **Compound status details**: You can now see more details about the compound status of both **compound objects** and **assets inside compound objects**. This enables you to identify missing content or other issues and ensure that all relevant product content is present and approved. See more information in **View collection information** for compound objects and **View basic asset information** for assets.
  - You can now **manually re-evaluate the compound status**, provided you have appropriate permissions.
  - The input fields in a compound object's "Compound information" tab now includes a permission check. If you do not have permission to view one of the required elements defined in the chosen compound type, then the "Required elements" and "Preview element" fields will be disabled and you will not be able to save the compound information.
  - If an asset is linked to a compound object, you can now also see the compound status of the object in the asset sidebar's "Locations" section.

Quality-of-life improvements that make your work easier

- In the detail view's "Metadata" tab, you can now decide if you want to show all metadata fields (including empty ones) or only those metadata fields that have a value. The setting has an effect on all places where asset or collection metadata is shown in read mode. See more information in **View all asset information** and **View collection information**.

- Whenever you switch between collection types, or between dashboard, explore view and advanced search, the application will remember how you left each area and return you to the same view again - selected collection, filters and all. Of course this also works if you log out and then back in again. Find more detailed information in "**How CELUM Content works**".
- If you try to go to the Advanced UI while an upload is running, you will receive a warning message and can decide to stay in the Nova UI. Uploads in progress will be cancelled if you leave the Nova UI before they are finished.
- Collections can now be shared via detail view. If sharing the direct link via detail view, then the recipient can open the collection in the same detail view tab as was open during sharing.

What's new in CELUM Content 23.5?

Rolling release build 6.16.6

- The input fields in a compound object's "Compound information" tab now includes a permission check. If you do not have permission to view one of the required elements defined in the chosen compound type, then the "Required elements" and "Preview element" fields will be disabled and you will not be able to save the compound information.

Rolling release build 6.16.5

- **Compound status details**: You can now see more details about the compound status of both **compound objects** and **assets inside compound objects**. This enables you to identify missing content or other issues and ensure that all relevant product content is present and approved. See more information in **View collection information** for compound objects and **View basic asset information** for assets.

Initial release

- **Compound objects**: With **compound objects**, you can perfectly model your product content in CELUM Content by defining multiple asset slots per product, including rules that define whether the object's content is valid and complete. This status is **evaluated** with every asset you link directly to the object, based on the values of a specific asset field. That way, you always know whether all relevant product content is present and approved - or which content is missing, so you can follow up.

Whether compound objects and all associated features are available for you depend on your system's **configuration**.

  - Compound objects have a **compound type**, which defines the rules for the objects. As a power user with super-administrator permissions, you can **administer compound types** in the Content administration.
  - The required elements in each compound object are determined by specific **asset field values**. The compound type governs the asset field and required values for it. On each specific compound object, you can set additional required elements. See **Edit compound information** for more information.
  - In the sidebar of a compound object, you can see the **compound status**, which shows you if the compound object is valid or invalid, complete or incomplete, and which elements are present or missing.
  - New dedicated **filter widgets** for compound types and compound status are available in the **Advanced Search**.

- **Placeholder assets**: With **placeholder assets**, you can create assets without uploading a file as basis. These are useful if you have not yet decided what the binary payload of an asset should be, but want to already set its metadata. You can assign an asset type and edit metadata for placeholder assets, as well as upload a new version to give it a binary file.
- **New collection wizard**: When **creating a new collection**, the creation process is no longer handled in a single dialog. Instead, a full-page collection wizard opens and guides you through the creation steps.
- **New collection detail view**: Collections now have their own **detail view**, which you can open with the "Open detail view" action. It opens in a full-page overlay and contains all pertinent information for a collection. You can also **edit the collection metadata** in its detail view.
- You can now **replace the preview image for video assets** with a new snapshot in the detail view.
- **Terminology changes**: With this release, we streamlined our terminology. Therefore, some areas of the Nova UI are called differently now and are referred by different words:
  - "Upload manager" is now called "Upload wizard".
  - "Metadata manager" is now called "Metadata wizard".
  - Files in CELUM Work are now also called "assets".

What's new in CELUM Content 23.1?

- **The Nova UI is now ready for our new cloud services, "CELUM Libraries" and "CELUM Experience"**:
  - The **system bar** now contains buttons for these 2 services, so you can easily switch to them. All you need to do is **connect** your CELUM Content user to your CELUM Cloud Account.
  - **Saved filters** in the **Advanced Search** can now be used in **CELUM Libraries** to populate created Libraries with assets. If you delete a filter that is used by a Library, the Library will not get any new assets from CELUM Content anymore.
- You can now compare 2 assets directly in the Explore View. Simply select them and use the action "Compare" to compare their previews and/or metadata. See **Compare assets** for more information. You have multiple actions available for each compared asset, like **linking it to additional collections** or **creating a relation** between the compared assets.
- The **image editor** now allows cropping and applying a preset resolution or preset dimensions even when "Original Format" is chosen as the target format. The previous restrictions for "Original Format" were removed.
- Default search logic changed to AND for full text search, but you can change between using AND logic and OR logic using the settings in **Content administration**. For more information, see **Find content**.

Be aware that this change does not directly affect saved filters. All filter combinations that were saved in release 22.9 or earlier were saved with OR logic and will apply OR logic on initial load. After a new search term is entered the saved filter will apply what ever search logic is set by the user in Content administration.

- When **moving a collection structure** containing a child collection that is used as value of a particular referencing drop-down field **into a different referencing drop-down field's root collection**, the child collection will be automatically removed from the original drop-down field's value.

What's new in CELUM Content 22.9?

- You can now **edit the notification settings** if you've turned on notifications for a collection. Additionally, you can choose a custom interval for your notifications, which can be set by a technical administrator.

- You can now **search for text** directly inside a document by pressing Ctrl + F in a document asset's detail view ("Preview" tab).
- You can now download an image asset that you have edited (rotated or flipped) in its original file format (e.g., PNG or JPG). See **Edit image assets before download** for more information.
- For **synchronizing your content with CELUM Drive**, you can now decide whether you want to synchronize all content inside the selected collection's whole hierarchy, or only content inside its child collections. When picking the latter, only the child collections will be recreated as folders in your CELUM location.

It depends on your system's configuration whether 2 options are available. If not configured, only the normal "Start Drive sync" option is available and synchronizes all content in the selected collection and its child collections to one flat folder (without sub-folders) in your local file system.

- We also made several small improvements to make your life easier:
  - You can now easily **link assets to additional parent collections via drag & drop**. Simply press the ALT key while you drag the asset(s) and the system will give you feedback on whether the action is possible.
  - When moving or adding assets, you can now open a context menu on collections. In the context menu, you can **create or favorite a collection directly in the collection picker dialog**. Additionally, you can **directly choose your favorite collections** in a dedicated section on top of the list.
  - The dates for creation and last modification of an asset now includes the exact time as well. The time is displayed in the list view of the Explore View and in the sidebar, among other places.
  - In the **Advanced Search**, you can now see the search relevance for assets in a dedicated "Relevance" column. You can sort by this column or hide it via the asset list configuration menu.
  - The default value for the language chooser in certain filter widgets (in Explore View and Advanced Search) can now be set in the **Content administration**.
  - If the Trash Bin function is activated, you can now restore deleted assets from the Trash Bin. See **Delete or restore assets**.

What's new in CELUM Content 22.4?

Our products have new names

To better communicate our branding, we have simplified the naming of the CELUM product suite. ContentHub is now called "**CELUM Content**", while WorkRooms is now called "**CELUM Work**". You use CELUM Work to collaborate with your team on in-progress content and to do online proofing, you use CELUM Content to manage and distribute your digital assets to where they're making the desired impact.

This change is also reflected in the online help.

- The **column configuration** for the asset list can now be saved and loaded. This enables you to define different views depending on your current need.
- The "Recent" widget on the dashboard is now invisible for consumer users (i.e. users who don't have the rights to create or edit assets or collections). This clears up the old behavior which left the widget constantly empty for consumers.
- You can now **view and inspect 3D assets** (i.e. assets based on a 3D model asset) in an **interactive 3D preview** in the detail view.

The interactive 3D preview is only available if the "3D viewer" feature is enabled on your CELUM Content server. If it's not activated, no interactive preview is shown.

- We improved the search and filter functionality in various ways:
    - For filter widgets based on referencing or drop-down fields, you can now **select all available options** in the widget via a "Select all" checkbox. This works in widgets on both the **Explore View** and **Advanced Search**.
    - In the **full text search options**, you can now select or deselect all languages for localized fields with a new checkbox. The previous limit of 5 languages was removed.
    - The **"General" filter widget** in Explore View has a new design and the list of media types in it was updated.
    - A new **"Search in collections" widget** in the **Advanced Search** enables you to search for assets that are linked to specific collections. This widget also has the "Select all" checkbox for up to 200 collections.
- Several small improvements make your life easier:
    - Values of regular drop-down fields can now be cleared while editing metadata.

- When showing the asset list in list view, you can now also **resize columns for "date" and "checkbox" fields**. This makes it possible to see the full column title for such columns.
- **You can now select most text in the application**.
- For predefined formats in the **image editor**, power users can now define a business label that gives further information about a format. You can see it by hovering over a format in the editor.
- You can now **download all asset properties** and other data about an asset's binary file in the "File information" detail view tab. The data will be saved in a TXT file.

How CELUM Content works

How CELUM Content works

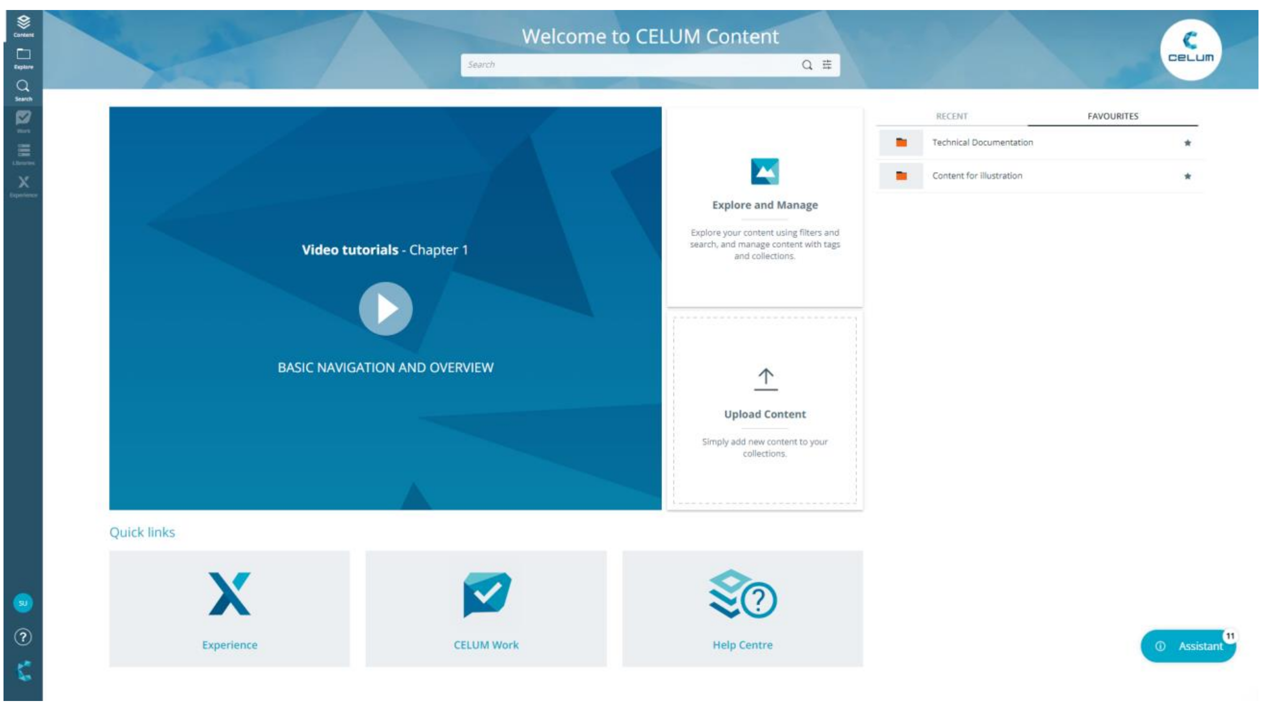
Welcome to the exciting world of CELUM Content!

With the CELUM Cloud suite of web-applications, you and your team can create, manage and route your marketing content to create engaging product stories and content experiences. CELUM Content is responsible for the "Manage" part of the content journey.

In this topic, you will learn how to get started with the "Nova UI" of the CELUM Content application.

First steps in the Nova UI

After you log in to the Nova UI for the first time, your entry point is the **Dashboard**. The Dashboard contains useful widgets for quick access to objects like your favorite content or your last uploaded assets, as well as a central search box so you can start browsing your content immediately:

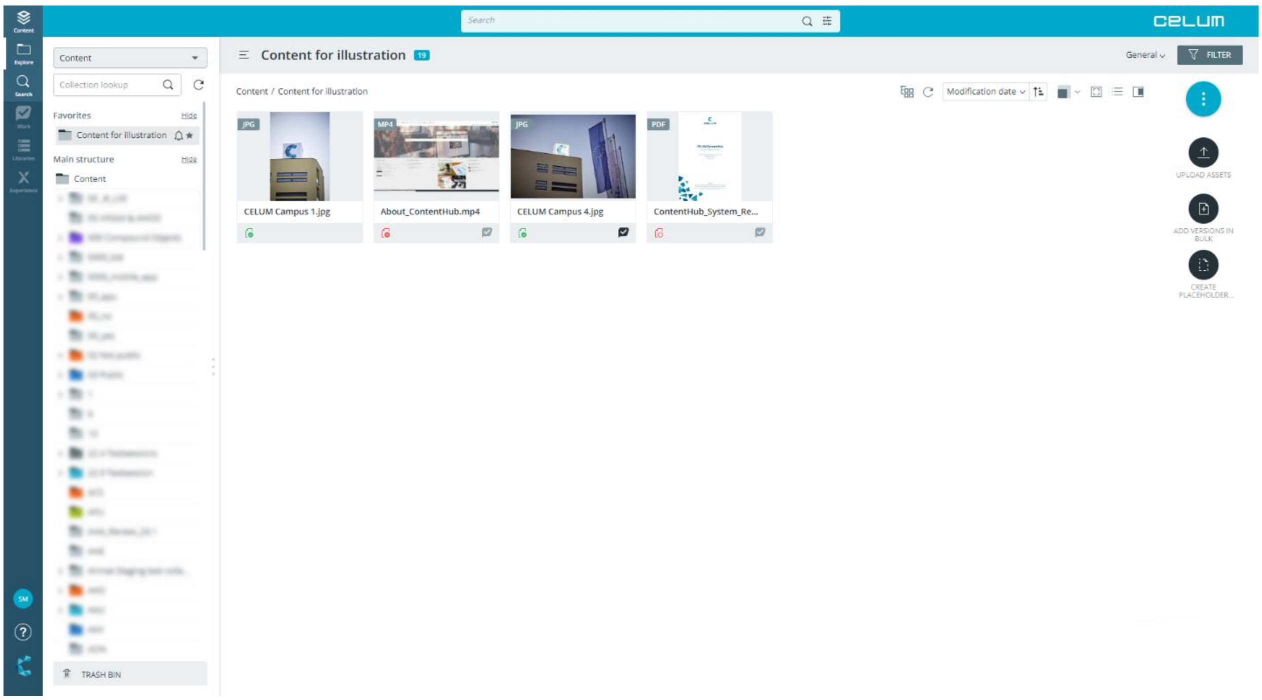


The informational section and quick links next to the "Recent" and "Favorites" widgets can be freely configured for your company's CELUM Content. Therefore, it may show different content for you than the above example.

In the narrow **system bar** on the left-most side of the application you can switch to other CELUM services, as well as change the application language or log out. Additionally, you can enter the **Explore View** and the **Advanced Search** via dedicated buttons in the system bar.

In the Explore View, you can navigate through the different collection types in the system, view or filter assets, and download objects:

If you cannot see any collection types, it means you do not have permission to see them. Please contact a power user who can give you the permissions.



In the Advanced Search, you can look for assets or collections by various metadata and attributes.

Continue where you left off

CELUM Content keeps the status of your work between sessions and when navigating between the different application areas (dashboard, explore view, advanced search). When you log in again after having logged out at an earlier time, you will be able to continue seamlessly:

- You will come back to the page you were last on (dashboard, Explore View, or Advanced Search).
- The collection or collection type you were last viewing will be open again in Explore View.

- The sidebar tab you were last viewing for an object will be open again in Explore View and Advanced Search.
- The setting for showing or hiding empty metadata fields in detail view, sidebar and batch edit selection view in the metadata wizard will be restored.
- If you had an active search before logging out, your last search results are shown again in both Explore View and Advanced Search. This includes the full text search terms, selected filter widgets as well as applied filter criteria.

What are assets?

Assets are the main pieces of content that you work with in CELUM Content. An "asset" is a piece of "upsmarted" marketing or product content (e.g. an image, document or video) inside CELUM Content that

- consists of a binary (file), usage control and metadata,
- has an asset type that determines its metadata,
- is organized in collections, and
- can have multiple versions (binaries) attached to it.

In short, an asset is the representation of a digital file in CELUM Content. Assets are created when you upload files to CELUM Content. They always have an asset type which determines their metadata, and they can be downloaded again in different formats as well as distributed to connected systems.

Asset types and what they do

An asset type determines which **information fields** each asset in CELUM Content can have. Asset types are configured according to the needs of your organization. This includes information categories as well as the information fields themselves.

In the application, you choose an asset type for each asset that you upload, thereby transforming it into a full-fledged asset that you can categorize with metadata.

What are collections?

Collections in CELUM Content are the equivalent of a folder or directory in your local file system. A "collection" is an "upsmarted" folder that

- provides usage control and metadata,
- has a collection type that determines its metadata,
- is organized in hierarchy of other collections, and
- can contain multiple assets and other collections.

In short, collections are the main organizational units in CELUM Content. You put assets into collections (i. e. link assets to collections) in order to structure them. Each collection can also have an icon and metadata of its own. Its metadata is determined by its collection type.

Collection types and what they do

A collection type determines which **information fields** a collection in CELUM Content can have. Collection types are configured according to the needs of your organization. This includes information categories as well as the information fields themselves.

In the application, you navigate to a collection type in the **tree** before creating a new collection. The new collection then automatically has that type and you can edit its metadata.

What are metadata?

Metadata are all information that describe an asset or a collection in CELUM Content.

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

The metadata of collections consist of the following aspects:

- **Information fields**: Just like for assets, the information fields for collections are configured by a system administrator.
- **Collection properties**: These are automatically assigned to the collection during creation. Examples include the name, icon or metadata validation.

Information fields always depend on the **asset type** (for assets) or **collection type** (for collections). By assigning a type, the information fields become available for the object.

Types of metadata fields

Each information field for assets or collections also has a specific type which restricts data types you can enter. CELUM Content provides fields of the following types:

- **Check box field**: You can enable or disable a check box field in order to give it a value of "yes" or "no". An out-of-the-box example for a check box field is the "Copyright required" field.
- **Date field**: A date field allows you to either enter a date in a specific format or choose a date from an intuitive date picker. An out-of-the-box example for a date field is the "License expires" field.

If you enter a date manually, the format depends on your current application language. For example, if you are viewing CELUM Content in **English**, the format is *MM/DD/YYYY*. If you are viewing CELUM Content in **German**, the format is *DD.MM.YYYY*.

- **Drop-down field**: A drop-down field allows you to choose a single option from a list. An out-of-the-box example for a drop-down field is the "Asset Availability" field.
- **Referencing drop-down field**: A referencing drop-down field is a special form of drop-down which allows you to choose one or multiple collections (usually of the "Keyword" type) from the list in order to categorize an asset. An out-of-the-box example for a referencing drop-down field is the "Author" field, which references a keyword "Persons" and allows you to choose any child collections of the referenced keyword.
- **Tag field**: A special type of referencing drop-down field that allows you to add hundres of **tags** from the drop-down list to an asset. One tag field (labelled "Tags") is available by default and all users who have permission to edit metadata on an asset can also edit this field. There may be multiple tag fields available for you as well.
- **Number field**: A number field allows you to enter a single number. Depending on the field's sub-type, you can either enter an integer number or a decimal number.
- **Text field**: A text field allows you to enter a single line of text. A text field can also be localized, which allows you to enter the text in multiple languages. An out-of-the-box example for a text field is the "Name" field.
- **Text area**: A text area allows you to enter multiple lines of text in the same field. A text area can also be localized, which allows you to enter the text in multiple languages. An out-of-the-box example for a localized text area is the "Content description" field.

The CELUM Content user interface

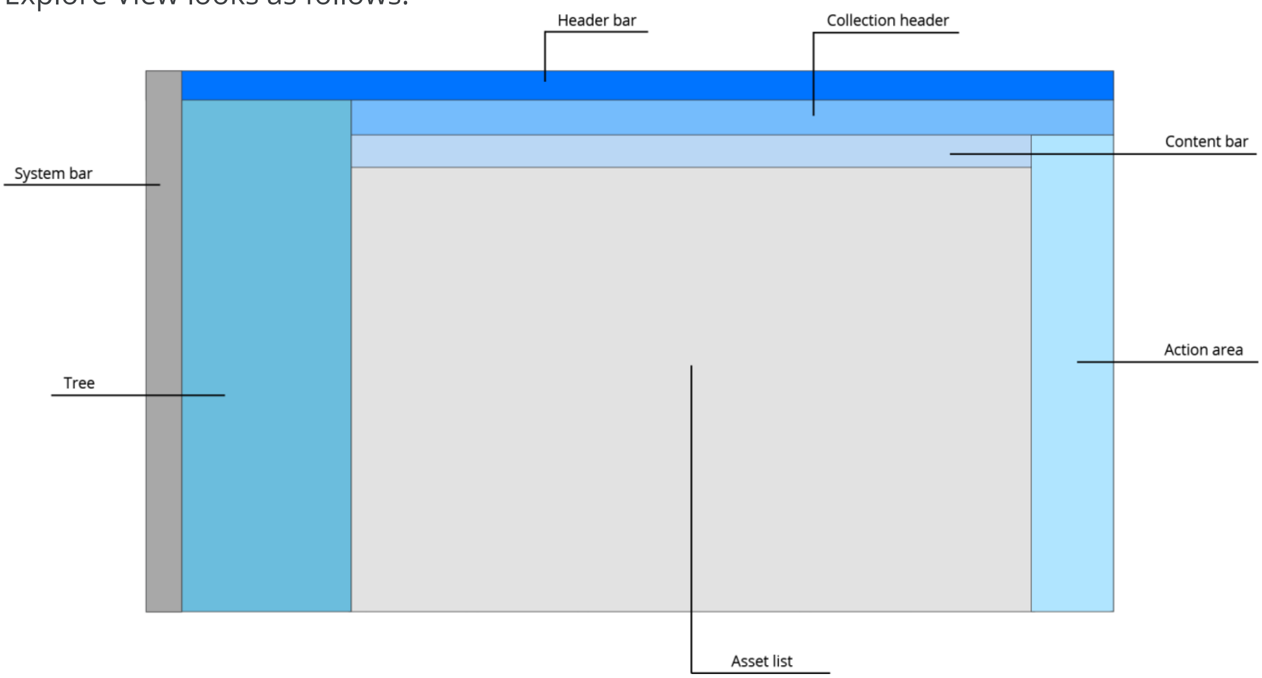
CELUM Content offers an intuitive, easy-to-use application interface where you can easily navigate between different content types and functions.

Overview of the application areas

The CELUM Content application consists of two main areas:

The **Dashboard** is your entry point to the application after you log in. It contains useful widgets for quick access to objects like your last modified objects (if you are allowed to create or edit objects) or your favorites, as well as a central search box so you can immediately start browsing through the system.

The **Explore View** is the actual "content hub" where you can browse through the different structures and assets, search, filter, and download objects. The general layout of the Explore View looks as follows:



- The **header bar** at the top of the Explore View contains a central search box to **search** for assets by any search term within the currently selected collection type or collection.
- In the **tree** on the left, you can navigate through the available collection types and collections to see all associated assets.

> If you cannot see any collection types, it means you do not have permission. Please contact a power user who can grant you the permissions.

- The **asset list** shows all assets within the currently selected collection type or specific collection.
- The **collection header** above the asset list allows you to **filter** the currently displayed assets by specific criteria and shows additional information about the currently selected collection.
- In the **content bar**, you can adjust how the assets are presented in the asset list with the buttons on the right side. The left side contains the breadcrumbs so you always know which collection path you have currently selected.
- The **action area** on the right side of the browser window gives you access to either featured actions or the **magic menu**, which lists all actions for the current context via the magic button.

A shared element of all application areas is the **system bar**, which contains links to other CELUM systems, the navigation buttons for Dashboard, Explore View and Advanced Search, your user avatar and user settings, the **help menu** and logout button.

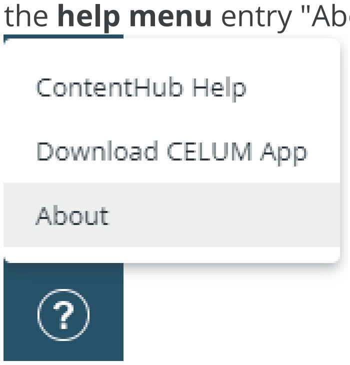
Refresh an application area

Refresh the following areas of the main view with the small icon:

- **Tree**: The icon is located next to the Lookup field on top of the area.
- **Asset list (content area)**: The icon is located in the content bar above the asset list.

Get information about the system

You can find information about your CELUM Content server's version, your license number, and the support contact for the server in the "About" dialog. Open the "About" dialog via the **help menu** entry "About" in the system bar:



Execute actions on objects

Available actions in CELUM Content are **context-sensitive**. This means they are determined by the following aspects:

- Your current location within the application,
- your permissions within the application, and
- which objects (assets or collections) you have selected.

On the left side of the Explore View, you can see the **action area**, which contains action buttons for the current context:

- The large **magic button** at the top opens the **magic menu** and gives you access to all available actions for the current context.
- Underneath the magic button, various smaller buttons give you quick access to the most important actions ("featured actions") for the current context.

Additionally, you can open the **context menu** via right-click on single or multiple assets in the asset list or on a collection in the tree, which allows quick access to all actions which are available for the selected object(s).

Some actions offer an "**undo**" option in a status snackbar in the bottom left corner of the browser window:

You can undo these actions within some seconds after execution.

Execute actions on multiple assets

The multi-selection of assets works concurrently to selection of files in your local file system:

- **Select multiple separate assets**: Press and hold the **Ctrl** (Windows) or **Cmd** (macOS) button on your keyboard.
- **Select a range of assets**: On Windows, select an asset, hold the **Shift** button on your keyboard and click another asset. On macOS, hold the **Shift** button your your keyword and draw a **selection box** with your mouse.
- **Select all loaded assets**: Press **Strg+a** (Windows) or **Cmd+a** (macOS) on your keyboard to select all currently loaded assets in the asset list at once.

Assets in CELUM Content are **loaded incrementally** while scrolling the asset list. Therefore, only the currently loaded assets are selected this way.

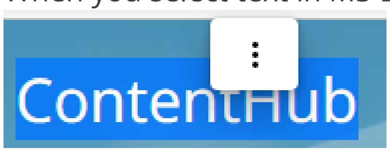
Select text in the application

You can select most text in the application via mouse clicks. This enables you to select, for example, metadata values or object IDs.

- **Click and drag your mouse:** Select specific characters and word portions.
- **Double-click a word**: Select the whole word.
- **Triple-click a text**: Select a longer piece of text, e.g. a whole headline or multi-word field label.

Automatic pop-up menu in MS Edge

When you select text in MS Edge, a browser-specific pop-up menu may appear:



You can turn this menu off via the "Hide menu" option in the menu.

Switch to Advanced UI

If you need access to advance and administrative functions of CELUM Content, you can go to the Advanced UI:

1. Click your avatar in the system bar to open your user settings.
2. In the user settings, click "Go to Advanced UI" to access it.

Online help for Advanced UI

To find help on how to navigate and use the Advanced UI, please switch over to the **Advanced UI section of the online help**.

Further adjustments necessary?

- **Change the asset list columns**
- **Change the application language**

The CELUM Content permission system

CELUM Content's permission system is based on three simple principles:

1. Permissions control both global access to specific functions and local access to specific collections/assets for any given user or user group. **Local permissions** are defined in "**Roles**" which are assigned to a specific user or group on a specific collection.

A concrete example for local and global permissions

A user has the global permission to upload assets. However, the user was not granted the local permission "Add assets" on any collections in the system. Therefore, the user can upload assets, but can never make these assets visible to other users because they can't be linked to any collections.

2. There are two kinds of collections in CELUM Content with regard to permissions: **Permission-defining collections** define local permissions for themselves and also for all assets within. **Non-permission-defining collections** only define local permissions for themselves. Assets in non-permission-defining collections are unaffected by their parent collection's permissions.

A concrete example for this principle

An asset is linked to two collections "A" and "B". Collection "A" is a *non-permission-defining* collection. Local permissions allow a user to manage versions for assets within the collection. Collection "B" is a *permission-defining* collection. Local permissions do not allow the user to manage versions for assets within the collection. Only the permissions on collection "B" are applied to the asset, so the user can't manage the versions for the asset.

3. Permissions are **additive**, which means that a permission granted to a user on a specific function or object cannot be withdrawn on the same object or function with a different permission set.

Concrete examples for additive permissions

A user has the global permission to upload assets to the system. The user then gets added to a user group which does not have the global permission to upload assets. The user can still upload assets regardless of the parent group's missing permission.

An asset is linked to two permission-defining collections "A" and "B". On collection "A", a user has the local permission to manage versions for assets

within the collection. On collection "B", the same user does not have the permission to manage versions for assets within. The user can still manage the asset's versions, even though the permission is not granted on all of the asset's permission-defining parent collections.

These three principles for permissions allow CELUM Content to represent your organization's real-world employee hierarchy and privileges in a highly granular and efficient way.

General user types

In the CELUM Content help, users with different permission levels are simplified in **three types** who have access to different functions:

- **Consumer**: Consumer users are normally only able to consume content, i.e. view, search and download it. Consumers users can neither upload new assets nor edit any metadata, independent of their local role permissions.
- **Contributor**: Contributor users have all the permissions of consumers or read-only users and can additionally contribute to CELUM Content, e.g. by uploading assets, creating/editing collections and editing metadata.
- **Power user**: Power users normally have all global permissions and in most cases also super-administrator-permissions, which grant them unrestricted access to all features of the application. All role-based permissions take effect for administrators.

Which global permissions are there?

Global permissions manage access to global functions which are only assigned to the user and are not tied to any specific object.

- **Upload assets**: Allows you to upload assets or asset versions to the system.
- **View expired assets**: Allows you to view assets whose validity date has expired.
- **Manage Content Type Permissions**: Allows you to set "View" and "Use" permissions for collection types and asset types.
- **Manage System Tasks**: Allows you to execute system tasks, for example for system cleanup or asset imports.

- **Edit expired assets**: Allows you to edit metadata of assets whose validity date has expired.
- **Download expired assets**: Allows you to download assets whose validity date has expired.
- **Administer PINs from other users**: Allows you to edit PIN Links from other users.
- **Change Password**: Allows you to change your own user password.
- **Users and User Groups**: Allows you to add, restructure, or remove users and user groups.
- **Super-Administrator**: Allows you to access every feature in the system and override local permissions on collections.

Not all of these global permissions can be set for every user. CELUM Content users have specific technical types. These technical types automatically restrict some of the global permissions. Find out how the technical user type influences the global permissions in the Administrator Guide in the **Customer Knowledge Base**.

Content type permissions

A special case of global permissions are content type permissions, i.e. the permission to view or use a specific **collection type** or **asset type**. These permissions are tied to the specific asset type or collection type and assigned to users.

Collection type permissions are not granted by default

Users can't see any of the collection types in the application by default. A power user must explicitly grant them the permissions for each collection type that they want to see.

Which local role-based permissions are there?

Roles only manage access to actions which users can execute on specific objects in the system. They are tied to a specific object and assigned to users on each object.

For **collections**, any role can define access to the following actions:

- **View**: The ability to view a specific collection and/or its child collections.

For **assets within permission-defining collections**, any role can define access to the following actions:

- **View**: The ability to view an asset.

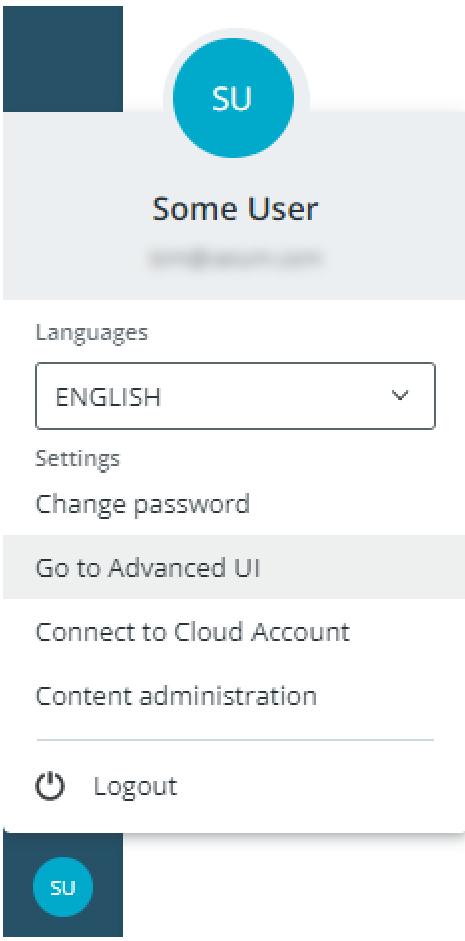
- **Manage Role Assignment**: The ability to assign roles to users on a specific collection.
- **Add/Delete/Move node**: The ability to add, delete, or move the current collection and/or its child collections.
- **Add/Delete/Move asset**: The ability to link, delete, or move assets to or from the current collection and/or its child collections.
- **Use in Information Fields**: The ability to reference the current collection in referencing Information Fields.
- **Manage Own PIN**: The ability to create, update, or delete PIN Links on the current collection and/or its child collections.
- The ability to edit the collection's **name**, **validation level**, and **icon**.
- The ability to edit the collection's **metadata**, down to field level.
- **Versions**: The ability to manage or add asset versions.
- **Security Context**: The ability to link an asset to another collection with different local permissions.
- **PIN**: The ability to create, update, or delete PIN Links on the asset.
- The ability to edit the asset's **name** and **availability**.
- The ability to edit the asset's **metadata**, down to field level.
- **Download Formats**: The ability to download a given asset in a specific download format.
- **Original Download**: The ability to download an asset of a specific file type in its original format. You can restrict the original download to specific file extensions.

Want to restrict permissions yourself? The Administrator Guide in the **Customer Knowledge Base** contains instructions.

Configure your user settings

Configure your user settings

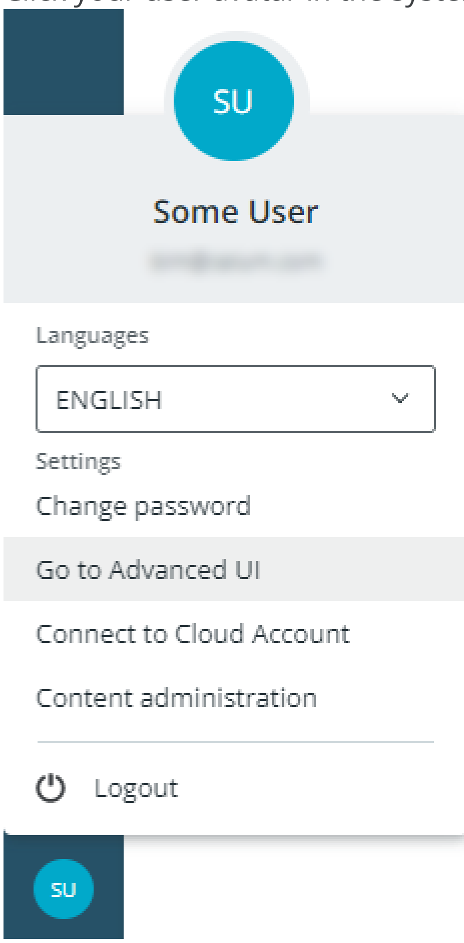
Your user settings enable you to make permanent adjustments to certain settings of CELUM Content. You can reach them via your avatar in the system bar:



Change your password

The "Change password" entry is only visible if you have the global "Change password" permission.

1. Click your user avatar in the system bar. The **user settings** open:



2. Click "Change password". A new dialog opens.
3. Enter your current password and new password in the designated fields.

Make sure you follow the new password requirements. Otherwise, the password will not be accepted.

4. Click "Confirm" to finish. A confirmation snackbar is shown in the lower left corner of the screen.

Change the application language

To switch the application language, click on your user avatar in the **system bar** and open the **user settings**.

There, you find a drop-down menu from which you can select a different language.

Connect to the CELUM Cloud services

Manual connection may not be necessary

From Release 24.7 on, the automatic "User Management via Cloud (UMC)" integration can be enabled on your system to allow for seamless integration between the CELUM services and easy login into CELUM Content with your CELUM Cloud user.

If it is enabled, the "Connect to Cloud Account" menu entry in the user settings is no longer available and the instructions on this page are not needed.

With the "Connect to Cloud Account" function in the user settings, you can connect your CELUM Content server to the services in the CELUM Cloud with the central **CELUM Cloud Account**. This allows you to:

- **synchronize assets** to your local file system with **CELUM Drive**.
- **add** a **collection** or a selection of **assets** **to a Workroom in CELUM Work**.
- get access to **CELUM Libraries** and populate your own Libraries with assets from CELUM Content. You can then use these Libraries to create dynamic public Portals with **CELUM Experience**.

The online help contains dedicated sections for CELUM Libraries and CELUM Experience

Prerequisites

In order to connect CELUM Content to the other CELUM services, you need a **personal user account in CELUM Cloud Account**, which allows you to connect to all CELUM services with only one central account. You can find information on how to **register** below.

If the "User Management via Cloud" is enabled on your CELUM Content system, you need to sign up via the **CELUM Cloud Account website**, complete the registration process there, and contact your company's organisation manager for access to the organisation account.

Register a CELUM Cloud Account user

You can get a CELUM Cloud user account by using the "**Connect to Cloud account**" function directly in CELUM Content. This will open the CELUM Cloud Account login page, where you can register a new user:

During the registration process, you automatically request membership in your company's organisation account in CELUM Cloud Account to gain access to the subscribed services. The organization managers for the organisation are automatically notified and will grant you access.

Alternative registration

Alternatively, you can also sign up via the **CELUM Cloud Account website** and complete the registration process. In that case, you may have to contact your company's organisation manager for access to the organisation account.

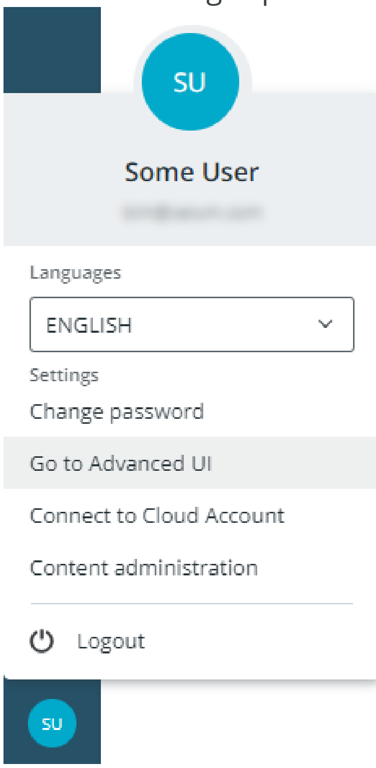
You can find more information about the registration process in the CELUM Cloud Account online help.

Connect CELUM Content to CELUM Cloud Account

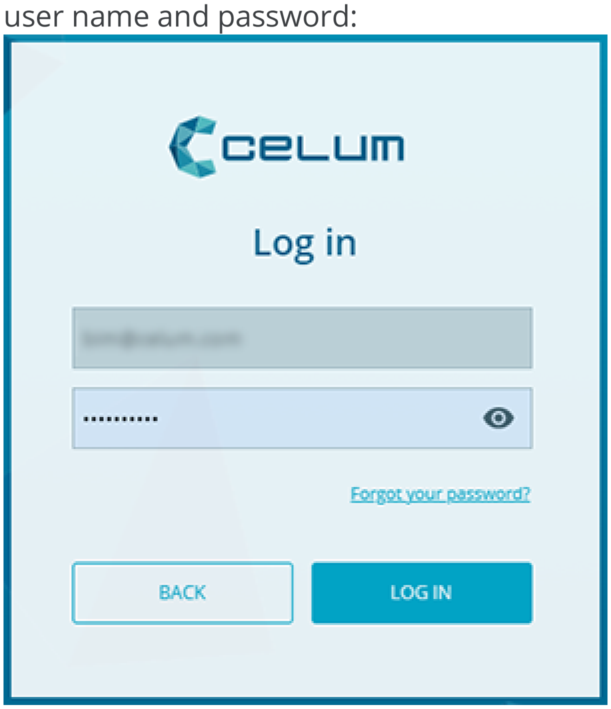
Once you have registered a personal CELUM Cloud user account (and the organization manager has granted you access to the CELUM services), you can seamlessly connect your CELUM Content user to CELUM Cloud Account. After you have connected, you can **synchronize your CELUM Content assets with CELUM Drive** or add collections and assets to a workroom.

1. Click your user avatar in the system bar.

2. The user settings open. Click "Connect to Cloud Account":



3. A new browser window opens in which you must enter your CELUM Cloud Account user name and password:

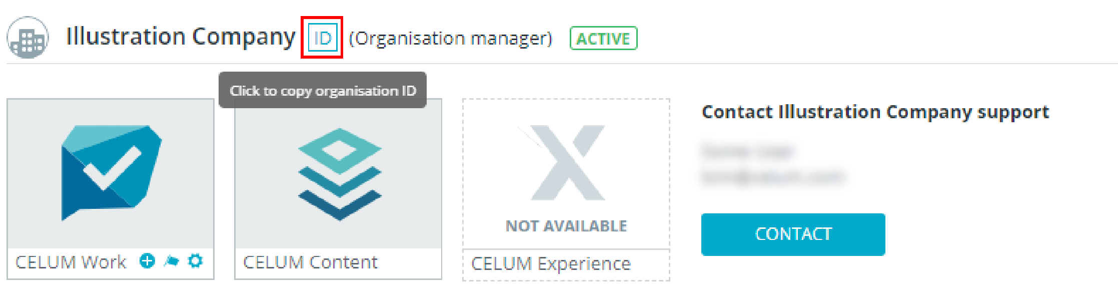


4. Click "Login" to get to the next step.

5. In the next step, enter the ID for the CELUM Cloud organization account that you want to connect to:

Get the organization ID from CELUM Cloud Account

To copy the organization ID, log into your CELUM Cloud Account and copy the ID directly on the "Home" tab:



6. Click "Connect". After you finish the process, you can use all the CELUM services which are subscribed and enabled for your organization.

Administer the system

In your user settings menu (accessible via your avatar in the system bar), the button "Content administration" offers options to configure certain aspects of your CELUM Content server.

Whether you see specific tabs within the Content administration depends on your system configuration and your permissions.

By default, the **"Search" tab** is available for all users.

The Content administration is separated into two parts:

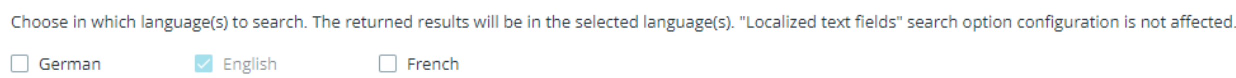
- The left sidebar shows the different **tabs** where settings are clustered thematically.
- The **configuration area** on the right shows the different settings in a given tab and enables you to make adjustments.

Administer global search settings

In the "Search" tab of the Content administration, you can configure various aspects of the full text search behaviour for your own user.

Configure the full text search languages

In the "Search" tab of the Content administration, you can set in which languages the full text search should look for a search term. The full text search will return results if any of their properties match the search terms in the selected language(s). By default, only the current application language is selected.



Selecting multiple languages could have an impact on the performance of the full text search, making it slower.

This setting governs the following localized collection or asset properties:

- Collection type
- Collection name
- Asset type
- Asset path
- Collection- or tag-references on assets

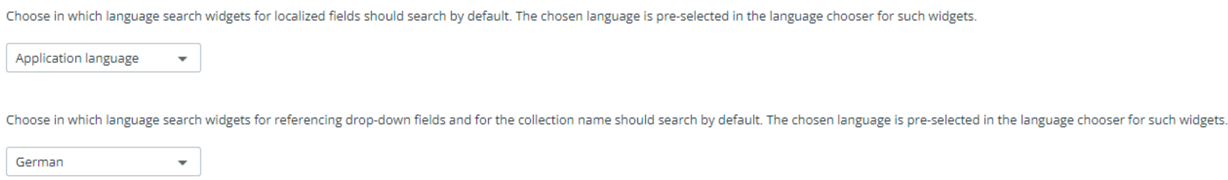
Thus, if any of the above properties contain the search term in one of the chosen languages, the collection or asset will be returned.

Localized text fields are not affected by this setting

its own setting in the **search options** which determines in which languages the values of localized information fields are searched.

Configure the default language for filter widgets

In the "Search" tab of the Content administration, you can set the **default language** in which **filter widgets for fields with multiple languages** should search:



These settings affect widgets based on the following fields:

- Localized text fields (single- and multi-line)
- Referencing drop-down fields
- Collection name (in Advanced Search)

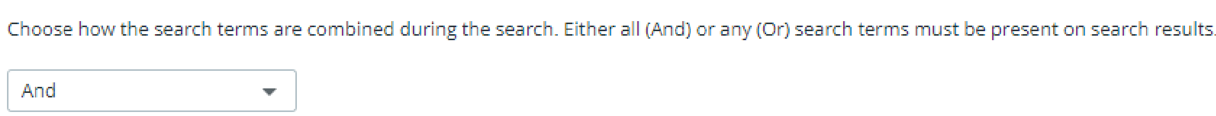
For both fields, you can select between the **current application language** of each individual user and a **fixed language**. If the chosen language is available for a given information field, then the chosen language is automatically selected in the language chooser for the respective filter widget.

For referencing drop-down fields and the collection name, the available languages depend on your system's back-end configuration. For localized fields, the available languages depend on the given field's back-end configuration.

If the chosen language is not available in the configuration of the given field, the **fallback** is either the current application language (if available) or the system's default language.

Configure the full text search logic

In the "Search" tab of the Content administration, you can decide how the search terms entered into the full text search should be combined to produce results:



If you set the drop-down to "**And**", then only assets which contain **all the entered search terms** in their metadata will be returned by the search.

If you set the drop-down to "**Or**", then assets which contain **at least one of the entered search terms** in their metadata will be returned by the search.

The types of metadata that are searched through is still determined by the **full text search options** for each individual user. If a search term is only present in a deactivated type of metadata for an asset, the asset will not be returned as a result for the user.

Administer compound types

In the "Compound types" tab of the Content administration, you can configure compound types and their settings.

This tab is only visible to you if you are a **power user with super-administrator permissions** and if the "Compound Objects" feature is enabled.

Compound types define the rules that must be satisfied after compound information is added to a collection. These rules have a direct impact on the **compound status** of the resulting compound objects.

Create a compound type

1. Click the "Create new compound type" button in the configuration are. The creation dialog opens.
2. Enter a unique **business key** for the type.

The business key uniquely identifies your compound type, so you cannot use it twice for different types. You can use lower case letters, dashes, numbers, and underscore.

3. Give the compound type a **name**. The name is localized, so you can add a name for every available language.
4. Select the **asset element field** on which assets within collections with this type are evaluated.

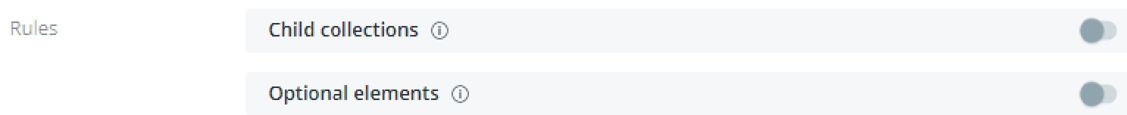
Only referencing drop-down fields are available as options for this field.

5. Once you have chosen an asset element field, select the **required elements**, i.e., which **asset element field values** must be present on assets in compound objects with this type.

Only referencing drop-down fields and checkbox fields are available as options for this field.

6. Optionally select an **asset validation field**. If selected, this field determines a specific value for asset validity as another requirement for completeness of compound objects.

7. If you have chosen an asset validation field, select the target **value for that field**. This value must be present on assets in compound objects with this type, otherwise the objects will not be complete.
8. In the "**Rules**" section, set the allowed content for collections with this type:



   - **Child collections**: If you enable this option, a compound object with your compound type can contain child-collections. If you disable this option, such collection will be evaluated as "invalid" if it contains other collections.
   - **Optional elements**: If you enable this option, a collection with your compound type can contain assets that have asset field values which are not set as "required". If you disable this option, such collections will be evaluated as "invalid".
9. Click "Create" to finish the creation.
10. Your new compound type is listed at the bottom of the list of existing types.

Edit a compound type

You can edit all compound types in the list, regardless of whether you created them yourself or not.

1. Open the context menu ⋮ on a compound type.
2. Click "Edit" in the context menu. The edit dialog opens.
3. In the dialog, you can edit all settings for the type.

> If the compound type is already in use on any compound objects, the collections will be re-evaluated if you change the asset field or rules of the type.

4. Click "Update" to save your changes.
5. A **confirmation dialog** appears and shows you how many collections will be affected.
6. Click "Update" in the confirmation dialog.

Delete a compound type

You can delete all compound types in the list, regardless of whether you created them yourself or not.

1. Open the context menu ⋮ on a compound type.
2. Click "Delete" in the context menu. A **confirmation dialog** appears and shows you how many collections will be affected.

> If the compound type is already in use on any compound objects, all compound information will be removed from them after deletion of the type.

3. Click "Delete" in the confirmation dialog.
4. Depending on whether the deleted compound type is currently used by any compound objects, you will get the following outcome:
   - **Not used**: The compound type gets removed from the list and from all affected compound objects.
   - **Used**: The compound type gets disabled and a warning icon shows that the deletion is in progress. You cannot edit or re-activate a disabled type.

> **Final deletion is done via system task**
>
> As a power-user with super-administrator permissions, you can trigger the deletion of all disabled types. Head over to the **Advanced UI** and open the "System Tasks" dialog via Administration menu. There, you'll find system tasks in the "Compound Objects" group.
>
> After triggering the appropriate system task, the type will be removed from the list.
>
> You can find more information about the available system tasks in the Customer Knowledge Base.

> Users can add a compound type to collections for which they have "Edit" permission. You can find more information about that process in **Edit compound information**.

Work with collections

Work with collections

In short, collections are the main organizational units in CELUM Content. You put assets into collections (i. e. link assets to collections) in order to structure them. Each collection can also have an icon and metadata of its own. Its metadata is determined by its collection type.

A word about permissions

As already mentioned in **The CELUM Content permission system**, some collections determine the permissions for all assets within them, while others don't. These two kinds are:

- **Permission-defining collections** define local permissions for themselves and also for all assets within.
- **Non-permission-defining collections** only define local permissions for themselves.

For both kinds of collections, **role-based local permissions** can be set. For the former kind, the asset permissions defined in the role will be applied to the assets inside the collection. For the latter kind, only the collection role permissions will be applied to the collection itself.

Metadata validation

The **metadata validation** describes the way in which the metadata of a collection or the assets within are validated. There are two validation levels for collections:

- **Strict:** You can only link assets to a collection with this metadata validation if all required asset information fields are filled. So, the assets must have an asset type and no empty required fields. Equally, you can only save a strict collection if all required information fields for the collection are filled.
- **Tolerant**: The asset's metadata status doesn't matter for collections with this metadata validation, you can even link assets without an asset type. Equally, you can save tolerant collections with empty required information fields as well.

By default, the validation level is *inherited* from the current collections's parent.

Get more information

- **Create collections**
- **View collection information**

- Edit collection metadata
- Move collections
- Share collections
- Synchronize with CELUM Drive
- Add collections to CELUM Work

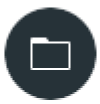
Create collections

There are two ways to create new collections in CELUM Content:

- **Manually** in the asset list in Explore View or Advanced Search
- **Programmatically** via SDK

Create collections in the user interface

1. Select a collection in the tree or asset list.
2. Click the "Create collection" action in the **action area**, **magic menu** or **context menu**:

3. The collection wizard opens as a full-page overlay. Here, you can set the collection's information.
4. In the first tab, "Metadata", you set the general information for the collection:
   - **Collection name**: You need to at least specify the collection's name in the **default language** of your CELUM Content server. The default language doesn't necessarily match with the language that the application is shown in.
   - **Metadata validation**: Metadata validation describes the way in which the metadata of a collection and the assets within are validated. See **Work with collections** for more information.
   - **Collection icon**: You can choose one of multiple configured icons for your collection.
5. (Optional) Click "Next" to go to the "Compound information" tab. Here, you can set a compound type if you would like to create the collection as a new **compound object**.

> You can find more information about compound information options in **Edit compound information**.

6. Click "Create" in the header of the wizard to create the collection.
7. The new collection is created and automatically selected in the tree. Additionally, a snackbar notification shows you the successful status.

There may be additional information tabs and information categories configured for the dialog, depending on the current collection type. Additional information categories contain information fields specific to your organization.

Create collections via API

CELUM offers a powerful REST API which allow you to create new collections programmatically or to allow your own customers to create collections via self-developed extensions.

Also available is the Nova API, which is specifically suited for developing Nova extensions.

- You can find information on how to develop against the CELUM APIs in the **Customer Knowledge Base**.
- Nova API documentation is integrated into CELUM Content. To access its specification, please open the **CELUM Content Server URL** using the following:
  - <CELUM Content base URL>/main/nova-app/storybook/index.html
  - <CELUM Content base URL>/main/nova-app/docs/nova-api/index.html

In addition to creating collections in the asset list, you can also find the "Create" action in the collection picker dialog when **moving or linking assets** to a collection.

FAQ and troubleshooting

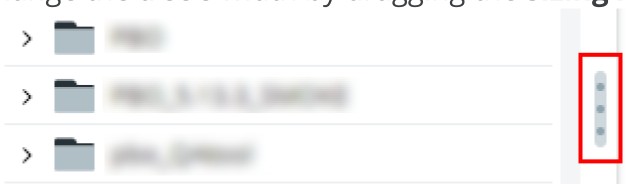
Why can't I save my collection?

The most likely explanation is that the collection has "**strict**" metadata validation but also contains invalid information field values. Look for empty required fields, fill them in and then try saving again.

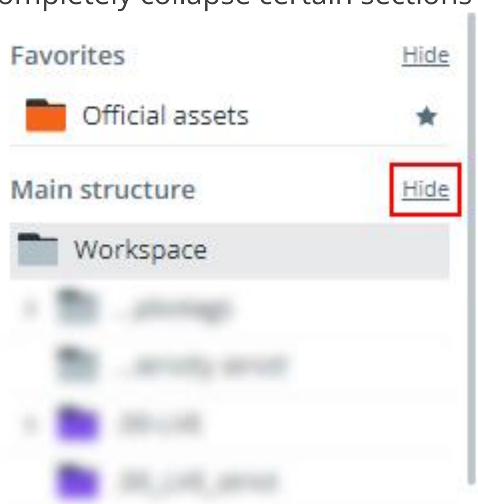
Adapt the tree

To manipulate the tree, you have the following options:

- Expand or collapse the tree with the ☰ button on the left side of the collection header.
- Change the tree's width by dragging the **sizing handler** on the right side of the tree:



- Completely collapse certain sections of the tree:



View collection information

You have 2 ways to see information about a selected collection:

- In the **sidebar**
- In the **detail view**

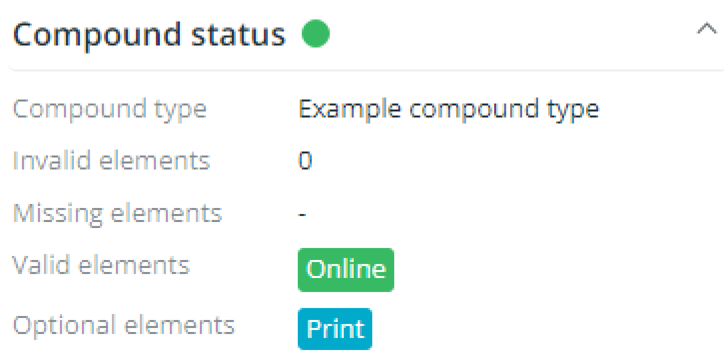
View collection information in the sidebar

Open the **sidebar** with the button in the content bar. The sidebar slides in from the right side of the asset list and shows all collection metadata in two tabs:

- **Information**: This tab shows the following information about the selected collection:
  - **General information**, like ID, name, or creation date.
  - **Location**, i.e., the parent collection path for the collection.
  - **Compound status**: Shows you information about the compound type and whether all rules for completeness and validity of the compound object are satisfied:

    The coloured **bullet** next to the headline reflects the evaluation result:
    - Evaluating - The status of the compound object is currently being evaluated.
    - Complete - All rules of the compound type are satisfied, assets for all required elements are present.
    - In progress - All rules of the compound type are satisfied, but assets for all required elements are not yet present.
    - Error - The rules of the compound type are not satisfied. For example, the collection contains child-collections even though the compound type does not allow them.

If you move your mouse over the status bullet, you will see a short summary of the compound status.



- "**Invalid elements**" shows how many assets inside the object do not conform to the compound type's rules.
- "**Missing elements**" shows which required elements are missing (i.e. are not an asset field value on any assets inside the collection).
- "**Valid elements**" shows which required elements are present (i.e. are an asset field value on any assets inside the collection).
- "**Optional elements**" shows which other, non-required elements are present.

- This section is only visible if the collection is a compound object (i.e. has a compound type set).

- **Metadata**: This tab shows all available information fields for the collection. The fields are organized and collected in various information categories, depending on your system configuration.

You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting.

You can find more information about this setting in the "**Show or hide empty metadata fields**" section below.

View collection information in the detail view

Open the detail view for a selected collection in the following ways:

- Right-click the collection in the tree and choose "Open detail view" in the **context menu**.
- Open the **magic menu** and choose "Open detail view" in it.

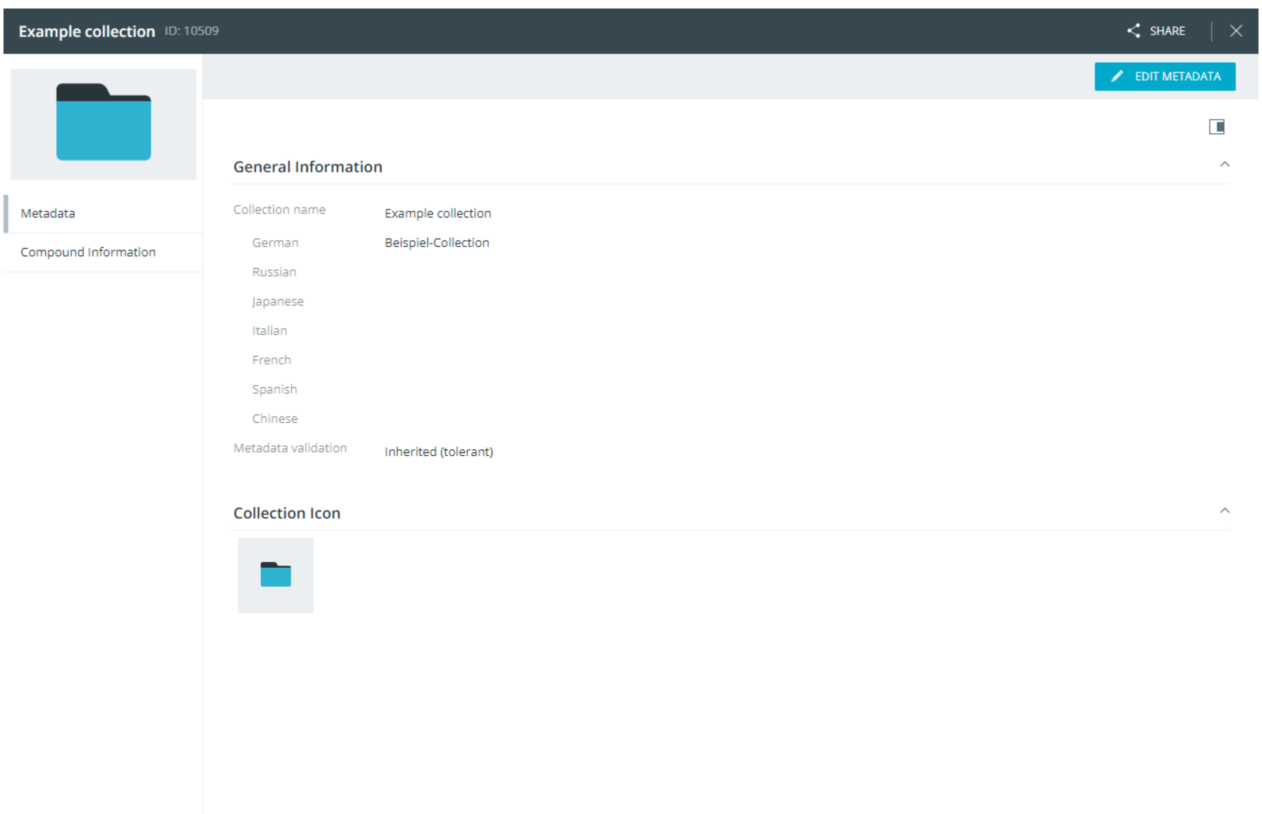
In the detail view, all collection information is shown in 2 tabs:

- **Metadata**: This tab shows the following information about the selected collection:
  - General information, like the name.
  - The collection icon.
  - Any information fields that are configured for the collection type.

> You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting. Once you enter edit mode, you will see all fields.
>
> You can find more information about this setting in the "**Show or hide empty metadata fields**" section below.

- **Compound information**: This tab shows you information about the compound type and required elements which are defined.

Additionally, the **sidebar** shows you other relevant information, like creation date, location and the **compound status**. You can open it with the button in the content bar.



Show or hide empty metadata fields

In the detail view's "Metadata" tab, you can decide if you want to show all metadata fields (including empty ones) or only those metadata fields that have a value. The toggle button in the content bar has two states:

- " **Show all fields**" : Click on the button in this state to show all metadata fields, regardless of their values. This means that currently, only fields with values are shown.
- " **Show only fields with values**": Click on the button in this state to show only metadata fields with values. This means that currently, all fields are shown, regardless of their values.

Fields of type "checkbox" will always be shown, even if they are not checked.

The setting's state is always the same in both asset and collection detail view. If you change the setting in asset detail view, it will also change in collection detail view, and vice versa.

This setting has an effect on the following places where metadata is shown:

- The "Metadata" tab in the sidebar for a particular asset or collection in Explore View and Advanced Search.
- The "Metadata" tab in the detail view of a particular asset or collection.
- The selection overview in the metadata wizard, where you view multiple assets' metadata before editing.

View details about the compound status

If a collection is a compound object, its compound status is shown (**as mentioned above**) with an information bullet. Via the context menu, you can see more details about issues or missing content in the compound object:

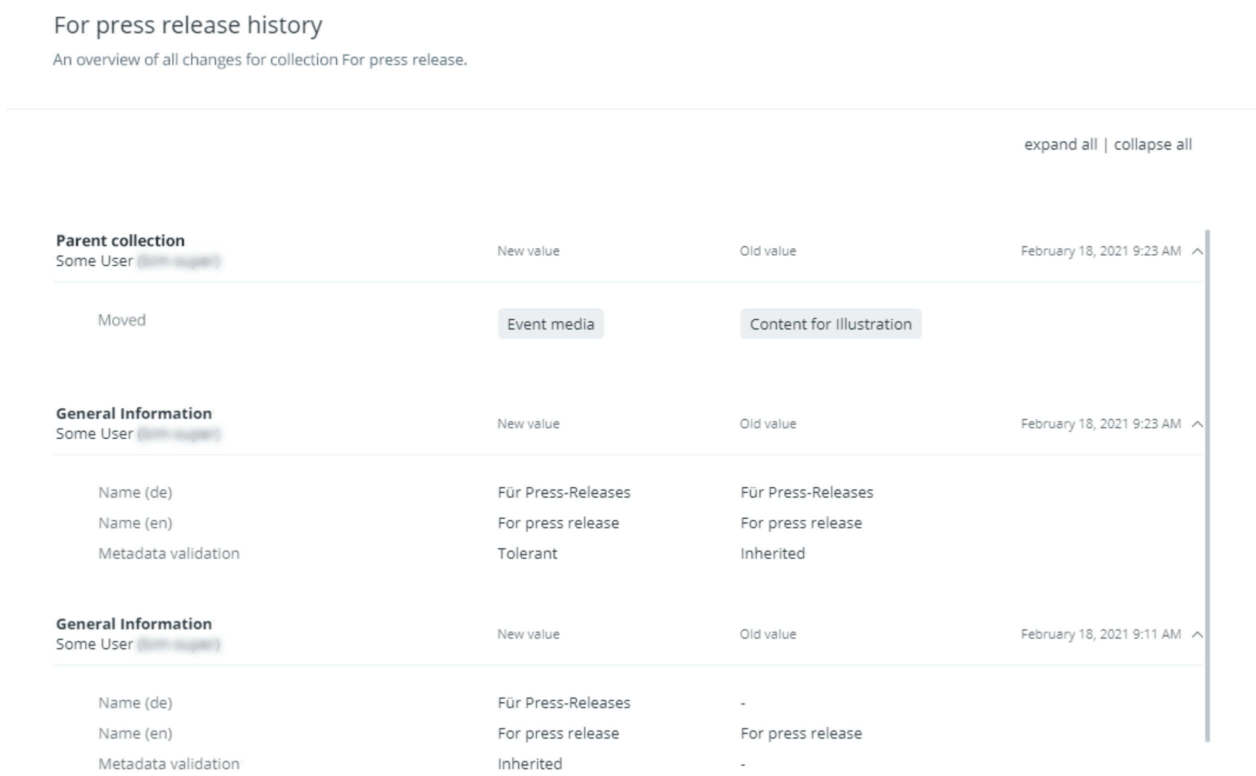
1. Right-click the compound object in the tree to open the context menu.
2. Click the "View compound status details" menu entry. A new dialog opens.
3. The dialog lists detailed descriptions of issues to help you resolve them.

View collection modification history

As a user with at least a minimum permission level (combined in a specific **user type**), you can get an overview of all changes that are made on assets or collections in CELUM Content.

> The minimum user type at which users can see the modification history depends on your CELUM Content server's configuration.

If you have sufficient permissions, open the **context menu** for the collection and click "Open modification history." A new dialog opens:



The changes are grouped by their category and date, with the following categories in use:

- **Parent collection**: Groups actions that change the collection's parent collection.

> This category also includes the collection where the current collection is initially created.

- **General Information**: Groups changes in the general collection properties.
- **Metadata**: Groups changes in information field values.

From left to right, the action or changed field, the new value after the change and the old value before the change are displayed for each category.

Get notifications about changes

You can turn on notifications to stay up-to-date with changes within specific collections. If you turn notifications on for a collection, you receive a daily e-mail notification which lists all changes that happen in the collection.

Turn on notifications for a collection

To turn notifications for a collection on, select it in the tree and click the "**Get notifications**" action in the action area, magic menu or context menu. The collection which you are receiving notifications for will be marked by a small bell icon in the tree.

You will get notified about all changes within the collection or within its child collections once per day

This includes the following information:

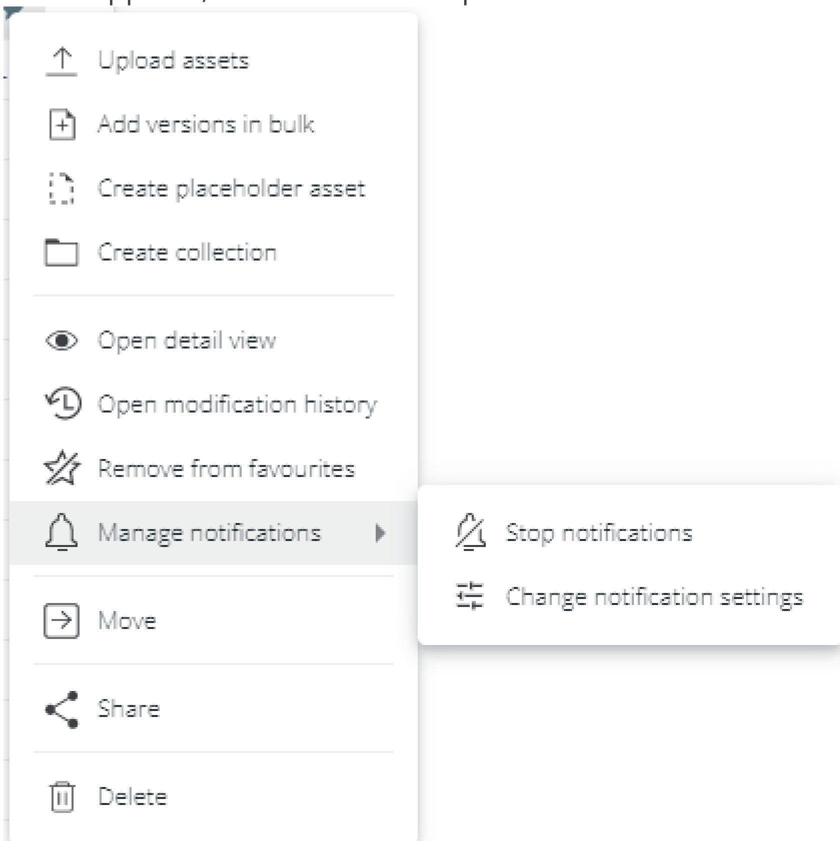
- Metadata of assets inside the collection or of the collection itself has changed.
- Versions of assets inside the collection have changed.
- Asset(s) inside the collection were activated or deactivated.
- Assets moved to or from the collection or the collection itself was moved.

If you want to choose what and how you want to be notified about, you can easily **change the notification settings**.

Turn off notifications for a collection

If you no longer want to get e-mail notifications you can easily turn them off via the "Stop notifications" action in the context menu or magic menu:

- In the context menu, hover over the "Manage notifications" menu entry until a sub-menu appears, then click the "Stop notifications" menu:



- In the magic menu, simply click the action "Stop notifications" directly.

You will not receive e-mail notifications anymore and the  icon disappears from the collection in the tree.

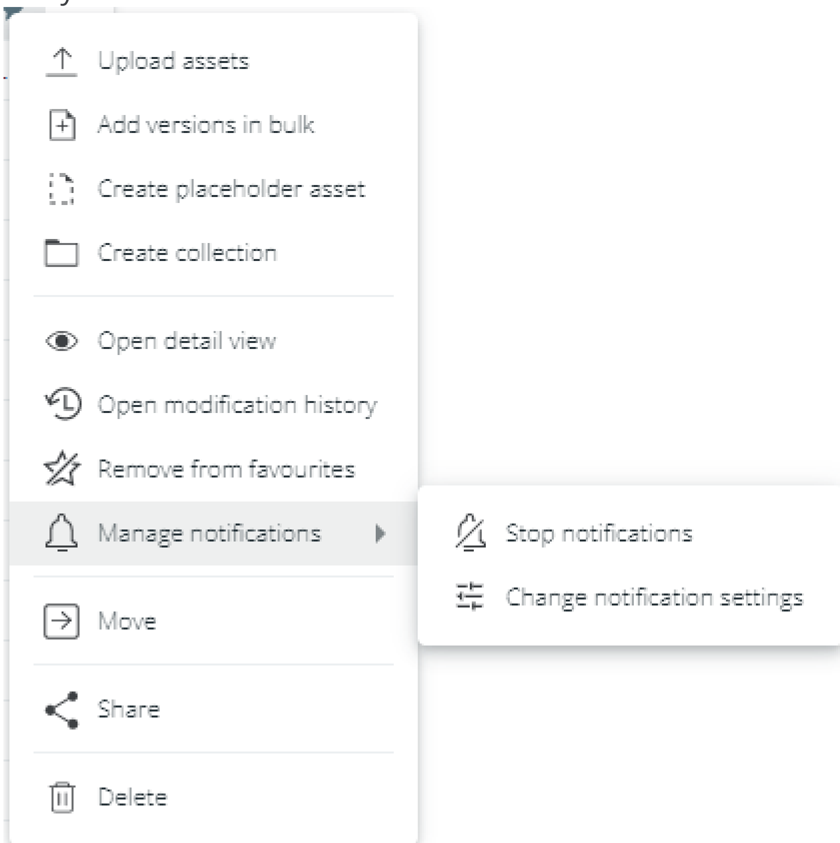
Change the notification settings

After you've turned on notifications for a collection, you can edit the settings to go into more or less detail:

- **Either** edit the settings via the snackbar notification immediately after turning them on:

- **or** edit them later via the "Change notification settings" action in context menu or magic menu:
    - In the context menu, hover over the "Manage notifications" menu entry until a sub-menu appears, then click the "Change notification settings" menu

entry:



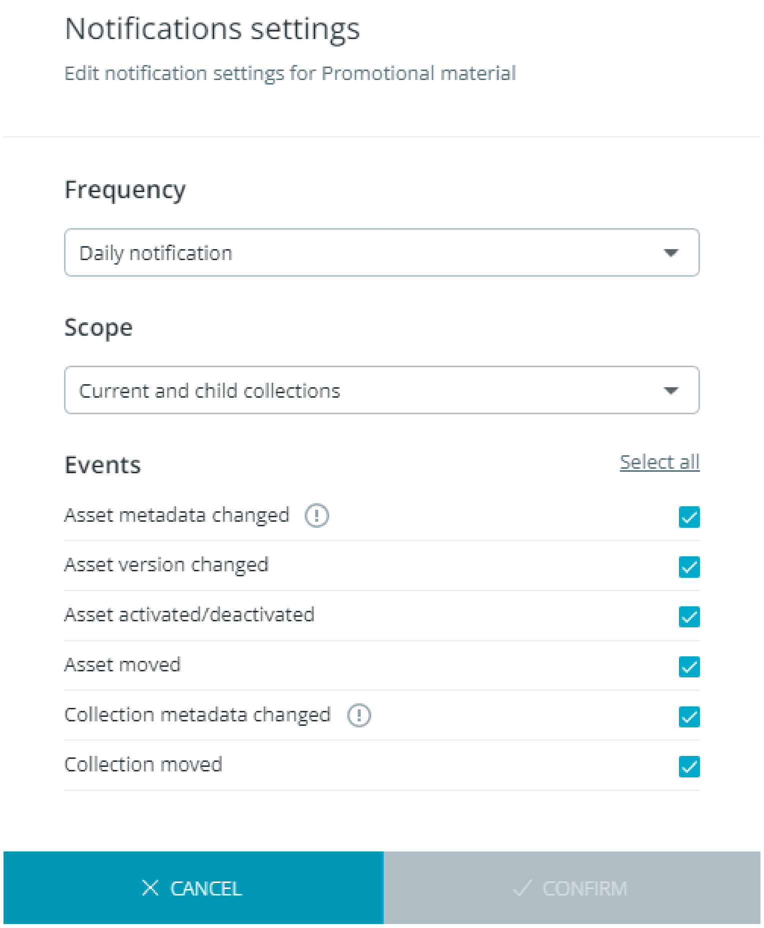
- In the magic menu, simply click the action "Change notification settings" directly.

Inside the **settings dialog**, you can set the following settings:

- **Frequency**: Decide in which interval you want to be notified. You can choose between daily, weekly, monthly, immediate or custom notification.

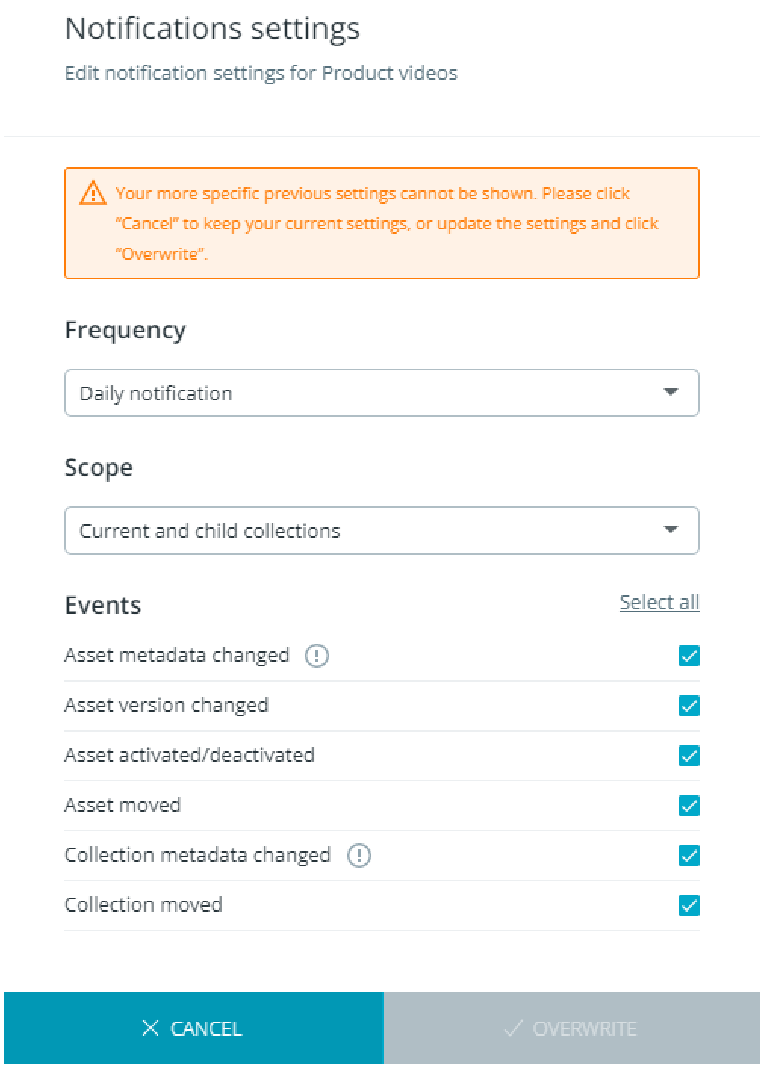
> For custom notifications, your technical administrator can configure the interval in the back-end of your CELUM Content server.

- **Scope**: Decide for which collections you want to be notified. You can choose between the current collection only, and the current and its child collections.
- **Events**: Decide for which events you want to be notified. You can choose multiple options, including asset or collection metadata changes, asset version changes, asset or collection movement and activation/deactivation of assets.



Migrate notifications configured in Advanced UI

If you have previously selectively configured the notification settings for the current collection in the Advanced UI, the dialog may display a warning at the top:



This warning is shown because the current configuration from Advanced UI includes settings that are not available in Nova. Examples are turning notifications on only for child collections, or turning off specific aspects of an event or action (e.g. turned on for "asset version added", but turned off for "asset version deleted").

The warning will disappear as soon as you make any changes to the notification settings in the dialog, and click "Overwrite". This will also overwrite the fine-tuned configuration in Advanced UI.

FAQ and troubleshooting

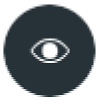
When editing notification settings, I see a warning "Your more specific previous settings cannot be shown". What can I do?

This warning in the notification settings dialog is shown because the notification you're editing was initially configured in the Advanced UI and not all chosen configurations are available in Nova.

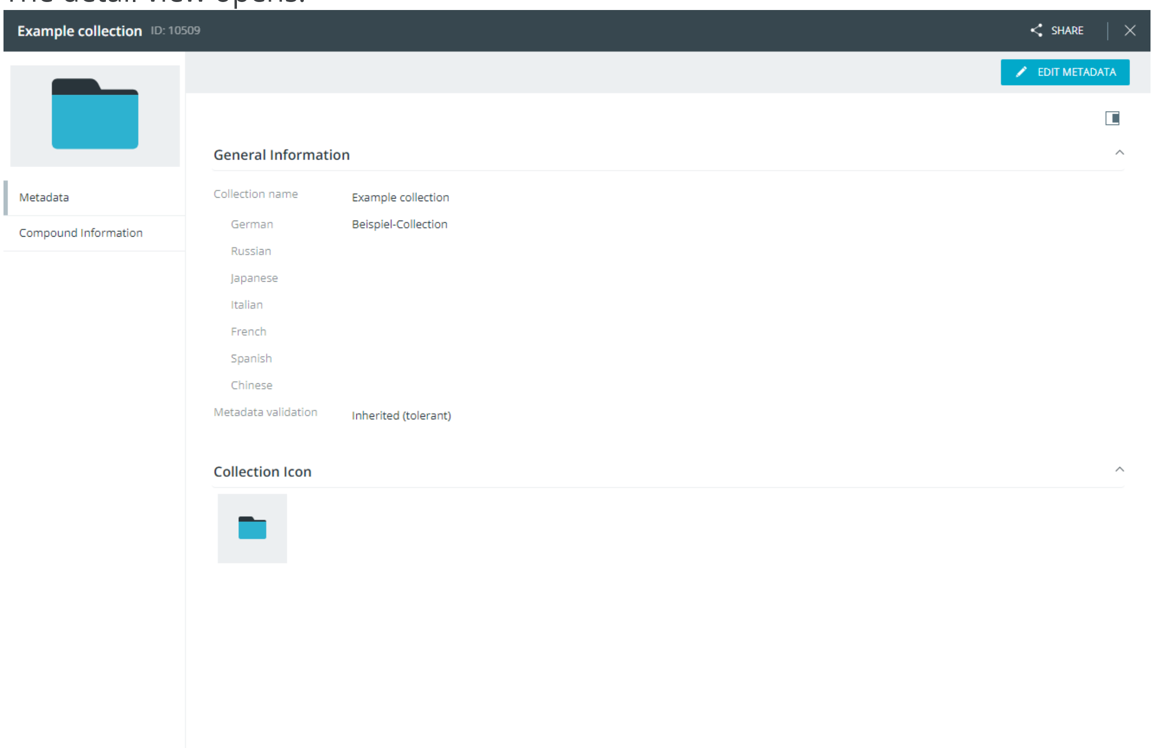
As described in "**Deal with notifications configured in Advanced UI**", please make some change to your settings and click "Overwrite" in order to turn the warning off. This will also overwrite the fine-tuned configuration in Advanced UI.

Edit collection metadata

1. Select a collection in the tree.
2. Click the "Open detail view" action in the action area, magic menu or context menu:



3. The detail view opens:



4. Switch to the "Metadata" tab in the navigation bar of the detail view.
5. The collection's metadata is displayed in the content area.

You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting.Once you enter edit mode, you will see all fields.

You can find more information about this setting in the "**View collection information**" article.

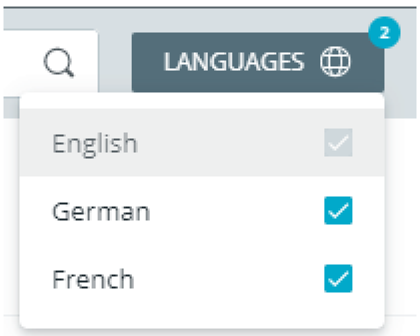
6. Click "Edit metadata" in the content bar. The information fields in the content area become editable.

7. Edit the field values. If any important editor information is available for a field, a small information icon on the right side of the content area indicates this and shows you a tool-tip when you move your mouse over it.
8. Save the changes with the "Save" button in the header bar.

Add values in multiple languages

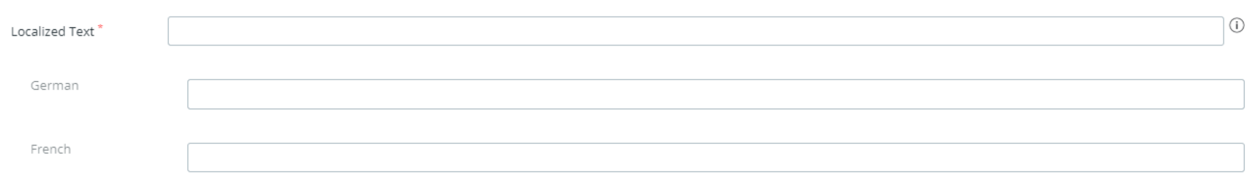
Along with normal text fields and text areas, the metadata may contain **localized** variants of such fields, which allow you to enter the field values in multiple languages. By default, only the application's default language is activated for each localized field (e.g. English).

Underneath the metadata dialog's header, you can add or remove additional languages via the "Languages" button:



The language chooser is only available if the current collection's type has information fields defined.

You cannot remove the default language from the selection. For each language which you activate, a new input field appears for each localized text field or text area:



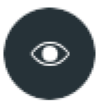
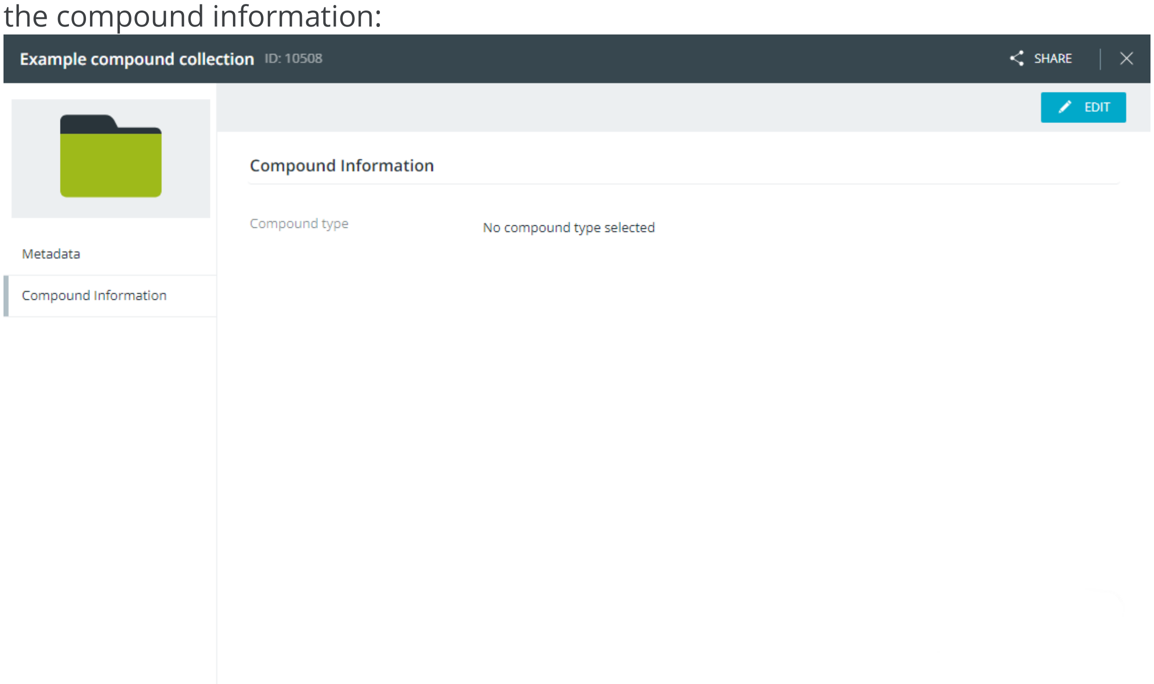
Edit compound information

With **compound objects**, you can perfectly model your product content in CELUM Content by defining multiple asset slots per product, including rules that define whether the object's content is valid and complete. This status is **evaluated** with every asset you link directly to the object, based on the values of a specific asset field.

For each collection where you have the "Edit" permission, you can add, edit and remove compound information to turn the collection into a compound object.

Compound objects cannot be created directly inside the root collection. The option is only available for collections that are at least one level further down.

Add or edit compound information

1. Select a collection in the tree.
2. Click the "Open detail view" action in the action area, magic menu or context menu:

3. The detail view opens.
4. Switch to the "Compound information" tab in the navigation bar on the left to see the compound information:


5. Click "Edit" in the content bar. The fields in the content area become editable.

6. Choose a **compound type**. The required elements as defined in the compound type are loaded and displayed.

> If you do not have "View" permissions on one or multiple of the required elements defined in the compound type, the input fields will be disabled and you will not be able to save the compound information. In that case, a warning is shown at the top of the content area.

7. (Optional) Add more **required elements** if needed.
8. Set the **preview element** for the collection. If an asset with the chosen asset field value is located inside the object, then the asset's preview image will be shown as the **collection preview image** in the sidebar, detail view, and Advanced Search results.
9. Click "Save changes" in the header bar.

> The compound object will be **evaluated** and an appropriate bullet will be added on it in the tree.
>
> You can see the compound status (the result of the evaluation) in the collection's **sidebar**.

Remove compound information

You can remove the compound type from a compound object and turn it back into a regular collection:

1. Select a compound object in the tree.
2. Click the "Open detail view" action in the action area, magic menu or context menu:
   
3. The detail view opens.
4. Switch to the "Compound information" tab in the navigation bar.
5. Click "Edit" in the content bar. The fields in the content area become editable.
6. Choose the "Unselected" option from the compound type drop-down.
7. The existing required elements are removed.
8. Click "Save changes" in the header bar.

> The object will be **re-evaluated** and the status bullet gets removed after saving.

Compound object evaluation

A compound object's compound type defines the rules for the object. The system will apply and evaluate these rules to visually provide cues as to whether all relevant product content is present and approved - or which content is missing, so you can follow up.

Compound objects are evaluated on the following activities:

- Compound information is added, edited or removed.
- New assets are linked to the compound object.
- You **manually re-evaluate the status**.

Only directly linked assets will cause a re-evaluation of the compound object. Assets inside child collections will be ignored.

The following information is taken into account for the evaluation:

- Are assets for all required elements present in the object?
- Are optional elements allowed in the object?
- Are child-collections allowed in the object?

Depending on the result of the evaluation, one of the following bullets will be shown in the tree on the collection that represents the compound object, once the tree gets reloaded:

Bullet	Meaning
●	Complete - All rules of the compound type are satisfied, assets for all required elements are present.
●	In progress - All rules of the compound type are satisfied, but assets for all required elements are not yet present.
●	Error - The rules of the compound type are not satisfied. For example, the collection contains child-collections even though the compound type does not allow them.

Compound status details

As described in **View collection information**, you can see more details about the compound status via the context menu on the object.

Recalculate the compound status on-demand

In addition to the automatic status evaluation during daily work in the compound object, you can manually re-evaluate the compound status:

1. Select a compound object in the tree.
2. Click the "↻ Re-evaluate" action in either
    - the Explore View in the **context menu** (via right-click) or the **magic menu** (via the magic button), or
    - the "Compound Information" tab in the object's detail view.

The action is only available if you have permission to edit the compound object and if the compound status evaluation is not already in progress.

3. The status bullet on the compound object changes to "Evaluating" . A snackbar gives information about the progress.

Once the tree gets reloaded, the bullet changes to the newly evaluated status.

Automatically create missing elements

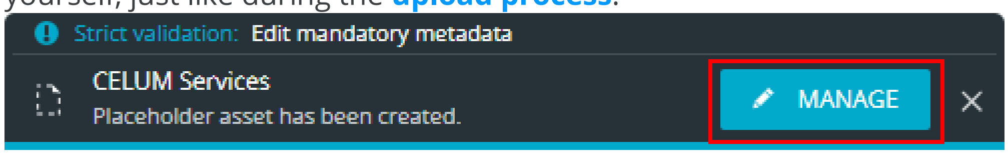
To ensure that all required elements are present inside a compound object and the object is thus complete, you can automatically create a placeholder asset for each missing element.

Prerequisites for creating missing elements via action

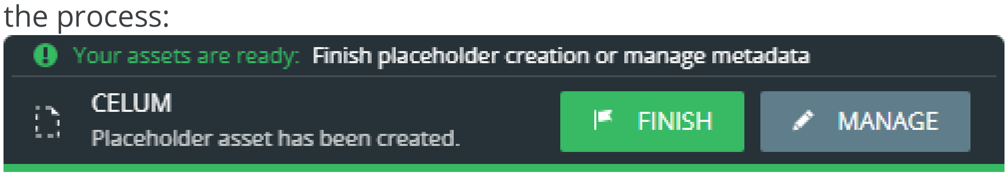
- The compound status for the selected compound object is " In progress". The action will not be shown in any other status.
- You have the following permissions:
    - Global "Upload assets" permission.
    - "Add assets" permission on the compound object.
    - Global permission to assign at least one asset type.
    - "Edit metadata" permission for the used compound type's "asset element field" on the compound object.

Additionally, the creation of placeholder assets may fail if the chosen asset type does not contain the used compound type's "asset element field", or if you do not have permission to add the required element collections as information field values.

1. Select a compound object in the tree.
2. Click the " Create missing elements" action in either the **context menu** (via right-click) or the **magic menu** (via the magic button).
3. Depending on the compound object's collection type (permission-defining or non-permission-defining), proceed as follows:
    - If the compound object is based on a **non-permission-defining collection**: A collection picker opens where you must select a permission-defining upload target collection.
    - If the compound object is based on a **permission-defining collection**: Continue with step 4.
4. Depending on the compound object's or target collection's metadata validation, proceed as follows:
    - If the metadata validation is **strict**, you can manage the asset's metadata yourself, just like during the **upload process**:



    - If the metadata validation is **tolerant**, choose an asset type that will be assigned to the placeholder assets.
5. After asset type assignment (for tolerant objects/target collections) where the asset type contains the "asset element field", one of the required element collections is added to the field for each created placeholder asset.
6. Additionally, the same snackbar as for **upload to a tolerant collection** is shown and you can optionally manage the placeholder assets' metadata further or finish the process:



The placeholder assets are linked automatically to both the chosen target collection AND the compound object if the compound object is **non-permission-defining**.

Move collections

In order to move an object to a specific collection, you need the **local "Add collection" permission** for the target collection. Additionally, you need the **local "Move collection"** permission for the source collection.

1. Select a single collection in the tree.
2. Use the "Move to" action in either the context menu or the magic menu. A new dialog opens.
3. Choose a target collection for the collection in the dialog.

If a collection is grayed out, it means you may not move the collection to it. A tool-tip explains the reasons for this.

4. Click "Move to" to confirm the dialog and move the collection to the selected new parent collection.

Impact on asset metadata

Referencing drop-down fields in CELUM Content use specific collections as their "root", as configured by an administrator. All child collections of the specified "root" can be chosen as values for a referencing drop-down field.

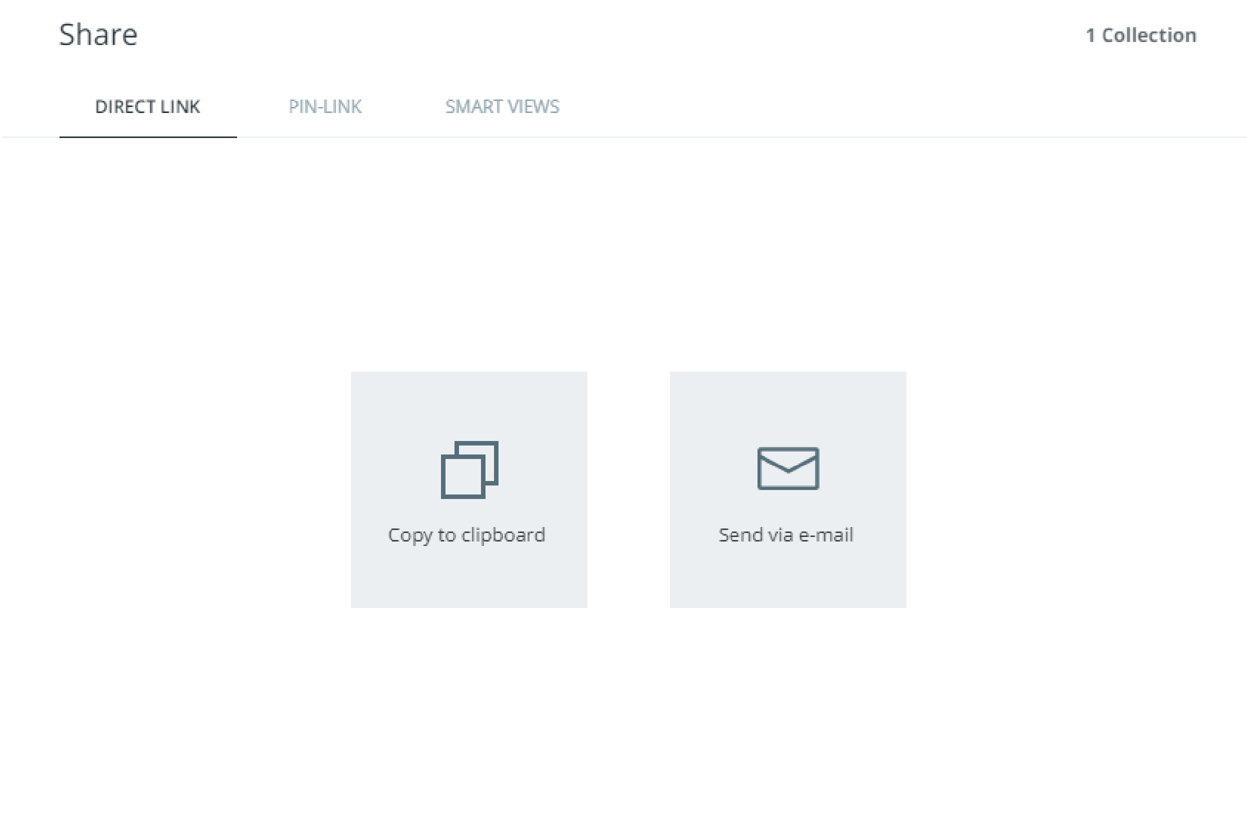
If the **Linking Feature** is enabled for your CELUM Content server and the moved collection is also **a value of a referencing drop-down field for an asset**, then that value will be removed from the associated field when the collection or its parent structure is moved out of the field's "root". If the new parent collection is the "root" for a different referencing drop-down field for an asset, the moved collection will be added as a value to the assets' other field.

Moving collections to the root level

Power users with super-administrator permissions can move collections to the "root collection" of the current collection type. For this type of user, this root collection is shown in the collection picker dialog and they can select it. It is not visible in the dialog for users without super-admin permissions.

Share collections

The easiest ways of sharing collections with other people is in the **"Share" dialog**, which you can open via the **"Share" action.**



The "Share" action is available in the following places for a selected collection:

- In the context menu.
- In the magic menu.
- In the detail view.

In the dialog, you have the following options for sharing a selected collection:

- Share the collection's internal **direct link**. You can use direct links to share the collection with other CELUM Content users and open the shared collection in the Explore View.

If shared via detail view, the direct link opens the collection's **detail view** with the same tab open as when the link was shared.

- Share an **existing external PIN-Link** for the current collection or **create a new one**. You can use PIN-Links to share the collection's content with people who don't have a CELUM Content user account.
- Share an **existing Smart View** for the current collection or **create a new one**, which makes the selected collection's content available in a public brand portal with advanced navigation capabilities.

To see and share Smart Views, a product extension is necessary. **This may incur additional licensing costs!**

Share collections with other users

You can share dedicated **direct links** for collections in CELUM Content:

1. Select a collection in the tree.

> You cannot select both collections and assets at the same time.

2. Open the "Share" dialog for your selection via the "Share" action in the **action area**, **magic menu** or **context menu**.
3. The tab "Direct Link" is opened by default.
4. Copy the direct link for the current selection via "Copy to Clipboard" or send it directly via e-mail.
5. If you choose to send it via e-mail, your operating system's e-mail client opens and automatically pastes the direct into the body of a new e-mail. A single hyperlink is pasted for the whole selection.

> You can send direct links to any CELUM Content user. However, the user must have the appropriate permissions in order to see the shared collections).
>
> **People who do not have a CELUM Content account cannot open direct links.** Use **PIN-Links** for external sharing instead.

What happens when a direct link is opened?

If a collection's direct link is opened, the asset list shows the **contents of the shared collection** in the Explore View.

> If shared via detail view, the direct link opens the collection's **detail view** with the same tab open as when the link was shared.

Share collections with external people

With CELUM Content's **PIN** and **Smart Views** functionalities, you can **share selected content for a specific period of time** with **other people** who do not have access to CELUM Content. This ensures that the people you make content available to can ONLY download the content you want them to have, when you want them to have it.

They are also **adaptable**, which means any changes in a collection's content are also reflected for the recipients of a PIN-Link or a Smart View on that collection. This allows you to create a PIN-Link or a Smart View directly after creation of a collection and decide later which assets should be put inside the collection and shared with the recipients.

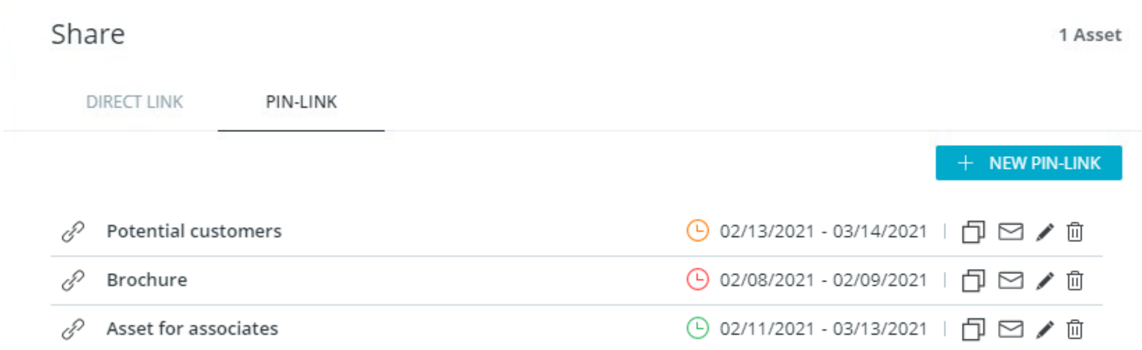
View and share an existing PIN-Link

You need the local permission "Manage own PIN" on the selected content, otherwise you won't be able to use the PIN-Link function.

You can view and share all PIN-Links which you have created on a selected collection in the "Share" dialog.

This tab is only visible if you have selected exactly one collection.

1. Open the "Share" dialog for a collection via the **action area**, **magic menu** or **context menu**.
2. Switch to the "PIN-Link" tab in the dialog to see a list of all PIN-Links:



Permissions necessary for seeing others' PIN-Links

If you don't have the global permission "Administer PINs from other users", you can only see your own PIN-Links, not links created by other users.

You can perform actions on each PIN-Link (left to right): Share it via copied link or e-mail, **edit it**, and delete it.

The "clock" icon next to each PIN-Link shows its status:

- An active PIN-Link will have the green status icon next to the date.
- An inactive link (whose validity has expired) will have a red status icon .
- If the PIN-Link has an orange icon , it will be valid from a defined time in the future.

You can also hover over different sections to see additional information on them.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the collection where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

The PIN landing page

Recipients of the PIN-Link can open the link in a browser, which opens the PIN landing page. On the landing page, recipients can choose from the available download formats for each asset to directly download each asset to their local file system. Alternatively, they can download all assets contained in the PIN-Link with one click or filter the available assets by their file type to download only assets of a specific type.

If they choose to download all or multiple assets, a ZIP file is created which is subsequently downloaded.

If the sent PIN-Link is invalid or unavailable, recipients will see an according error message instead of the included assets.

Create a new PIN-Link

You need the local permission "Manage own PIN" on the selected content, otherwise you won't be able to use the PIN-Link function.

You can create a PIN-Link with a variety of settings for a single collection:

1. Open the "Share" dialog for a collection via the **action area**, **magic menu** or **context menu**.
2. Switch to the "PIN-Link" tab in the dialog.

This tab is only available if you have selected exactly one collection.

3. Click the "Create PIN-Link" button 

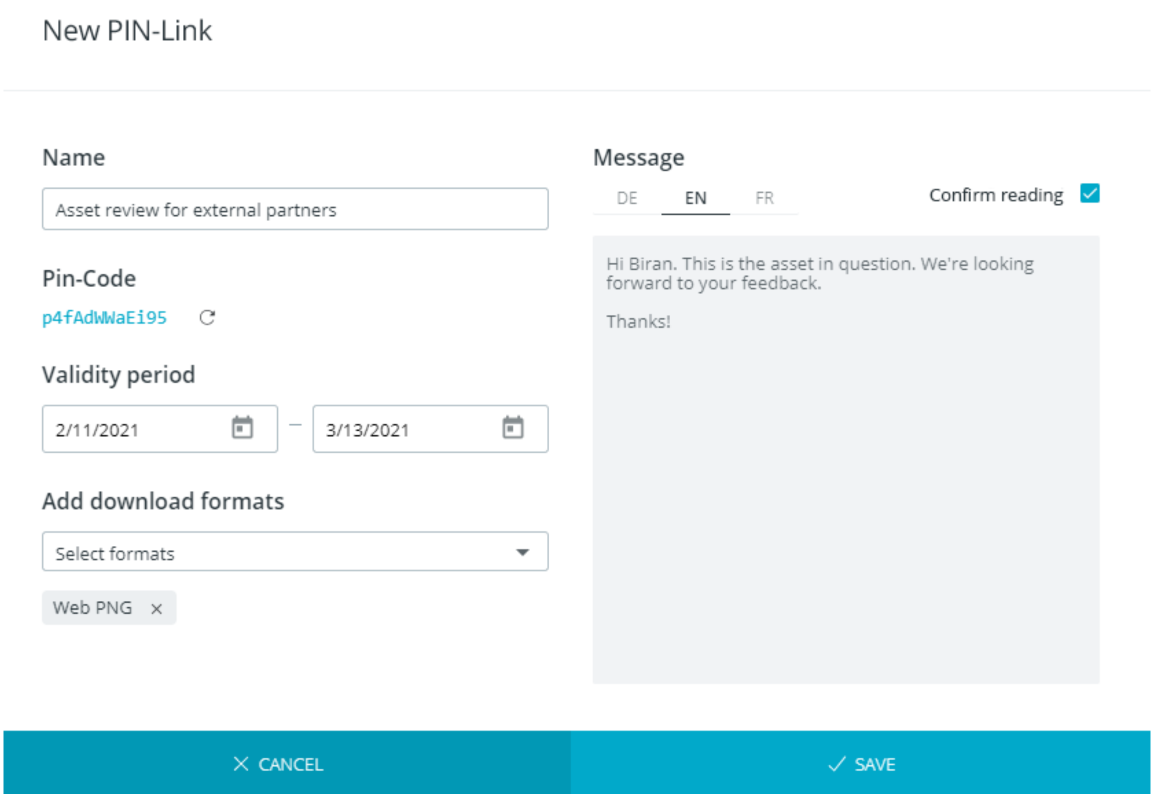
. A new dialog opens.

Quick PIN-Link with default configuration

Click "Save" immediately after the dialog opens to save the created PIN-Link with its default settings.

By default, the **name** of the PIN-Link matches the name of the shared collection. The **validity period** is set to 30 days, starting with the creation date. The preselected **download format** depends on your CELUM Content server's configuration.

4. In the left section of the dialog, you can see an overview of the basic information about the PIN-Link. There you can set the following:



- **The name of the PIN-Link**: Simply change the name inside the text field.
- **PIN-code**: The PIN-code is the unique ID for the link. Click on the refresh icon next to the already generated PIN-code to generate a different PIN-code.
- **Validity period**: States the time period in which the PIN-Link is active. Click on the date icons on the left and right side to open the calendar and set your preferred validity period.
- **Download formats**: The amount and the default download formats displayed depend on your configured PIN-Link download format settings. Click "Select formats" to select one or more download formats for the content of the current collection.

5. In the right section, you can optionally write a note to the PIN-Link recipient. You can choose:
   - **The language of the message**: By default, English is the set language. Click on the respective language abbreviation to switch. Your language options depend on your CELUM Content configuration. The message will be shown to the recipients when they open the PIN-Link.

The message is only shown if the language of the PIN landing page matches the defined language of the message. If the language doesn't match, the recipient can open the message dialog manually by clicking the "Information" icon in the landing page.

   - **"Confirm reading" selection**: If you select this option, a dialog containing the message will appear on the PIN landing page provided that the recipient's locale matches the selected language of the message.

6. To confirm, click "Save". The PIN-Link is automatically copied to clipboard and ready for use.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the collection where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

View and share an existing Smart View

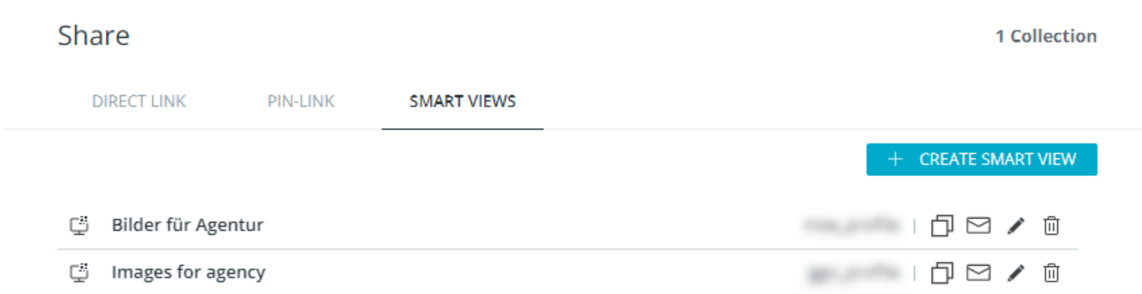
Prerequisites

- The **"Smart Views" product extension** is deployed and configured correctly on your system. **This product extension may incur additional licensing costs!**
- You are allowed to view the "Smart View" tab in the Share dialog for the selected collection.

You can find instructions for deploying and configuring the "Smart Views" extension in the **Customer Knowledge Base**.

You can see Smart Views that were created for a specific collection:

1. Select a collection and open the context menu.
2. Click the context menu entry "Share".
3. In the Sharing dialog, open the tab "Smart Views" to see all Smart Views on the current collection:



If you want to share an existing Smart View you can

- copy it to clipboard, or
- send it via e-mail:

The external recipients can access the link and browse, view and download the assets in the collection.

Create a new Smart View

Prerequisites

- The **"Smart Views" product extension** is deployed and configured correctly on your system. **This product extension may incur additional licensing costs!**
- You are allowed to view the "Smart View" tab in the Share dialog for the selected collection.

You can find instructions for deploying and configuring the "Smart Views" extension in the **Customer Knowledge Base**.

1. Navigate to a collection where you have the appropriate permissions.
2. Right-click the collection to open the context menu, or go to the magic menu.
3. Choose "Share". The Share dialog opens.
4. Click the "Smart Views" tab.
    - If there are no Smart Views configured on the collection yet, the tab only contains the "New Smart View" button.
    - If there are already Smart Views configured, they are **listed in the tab**.
5. Click the "Create Smart View" button. A new dialog opens.
6. Enter the following information:
    - **Name**: By default, this is the collection's name.

    The Smart View name must be **unique** across the whole system, otherwise an error snackbar will be shown on saving.

    - **Default Language**: The preselected language of the Smart View when it is opened. The language options depend on your CELUM Content server's configuration.
    - **Profile**: Choose one of the Smart Views Profiles which were configured in the Configuration Management.

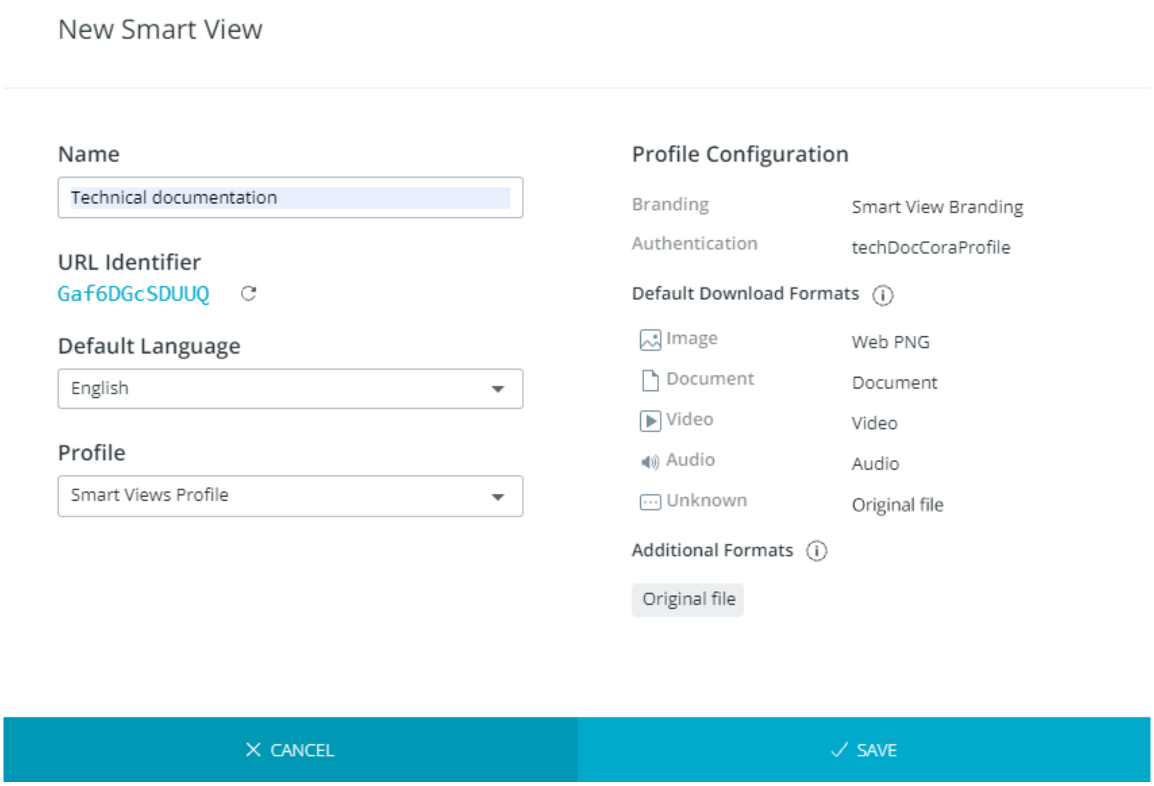
    Invalid profiles, i.e. profiles with missing required fields, will not be visible in the "Profile" drop-down menu.

    Check "View"-permissions for recipients

To avoid accessibility problems with your Smart View, please check with the person who created the Smart Views Branding Profile if the user that was specified in the used API Authentication Profile also has "View"-permissions for the collection on which you are creating the Smart View.

If the user specified in the API Authentication Profile doesn't have "View"-permissions for that collection, nobody will be able to view the Smart View's URL, because the REST API user's permissions determine whether the Smart View on a particular collection is visible.

7. Based on the chosen Profile, the right section of the dialog is updated and shows a read-only preview of the Smart Views Profile configuration:



The **URL Identifier** is a unique identifier which is part of the Smart View's URL. You can regenerate it with the small refresh button .

8. Click the "Save" button to apply the changes and finish. This closes the dialog.
9. Once you have created a Smart View, the link to it is automatically copied to clipboard and ready to be sent.

Manage Smart Views

You can create Smart Views on a specific collection "Smart View" tab inside the "Share" dialog for the collection.

Additionally, you can edit or delete a smart view via the same mechanism.

Prerequisites

- The **"Smart Views" product extension** is deployed and configured correctly on your system. **This product extension may incur additional licensing costs!**
- You are allowed to view the "Smart View" tab in the Share dialog for the selected collection.

You can find instructions for deploying and configuring the "Smart Views" extension in the **Customer Knowledge Base**.

Edit a Smart View

1. Once you have the "Smart Views" tab open in the "Share" dialog, find the Smart View you would like to edit.
2. Click the "edit" icon next to the Smart View and make the changes.
3. Click "Save" to apply the changes.

If you edit the "URL identifier" field, the recipient will no longer have access to the Smart View via the old URL.

Delete a Smart View

1. Once you have the "Smart Views" tab open in the "Share" dialog, find the Smart View you would like to delete.
2. Click the "Delete" icon next to the Smart View.
3. A snackbar notification lets you know that the selected Smart View was deleted.

Once the Smart View is deleted, you cannot restore it and it will no longer be accessible to its recipients.

Save collections as favorites

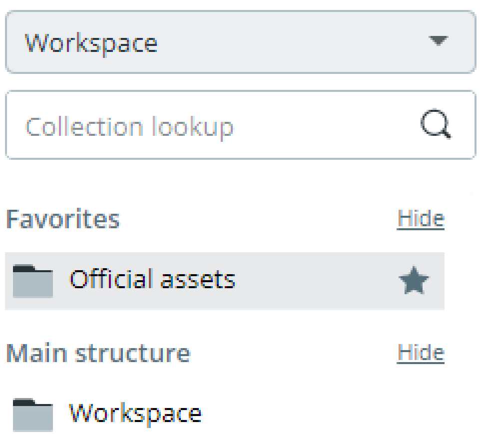
If you often work with the same collections in the system, you may want to create a shortcut to them. These shortcuts in CELUM Content are called "favorites".

Set a collection as a favorite

1. Select a collection that you want to add to your favorites in the tree.

> You can only select either assets or a collection, not both at the same time.

2. Click the "Add to favourites" action in the action area, magic menu or context menu to set it as a favorite.
3. Above the "Main structure" section of the tree, a new "Favourites" section appears. The collection is added to it:

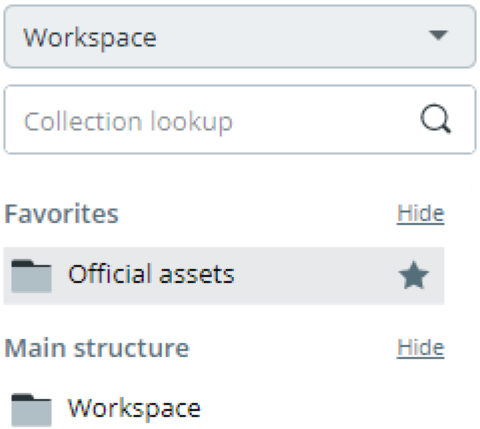


4. Additionally, the collection gets marked with a small icon in the tree.

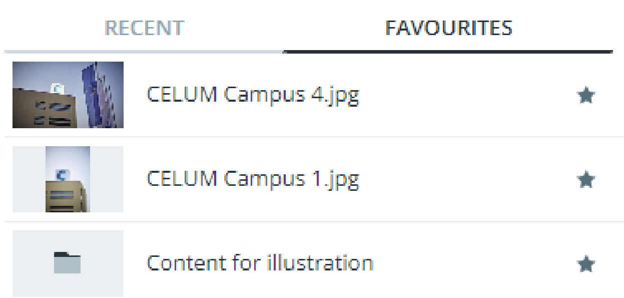
Open a favorite collection

You have two ways to directly open a favorite collection:

In the **Explore View**, the **"Favourites" section** at the top of the tree shows all favorite collections of the currently selected collection type. Click a favorite collection to directly open it and see its content in the asset list:



In the **Dashboard**, you can view and access favorite objects in the **"Favourites" widget.**



Double-click a favorite **collection** in the widget to directly open it in the Explore View and see its content.

Remove a collection from your favorites

You have two ways to remove a collection from your favorites:

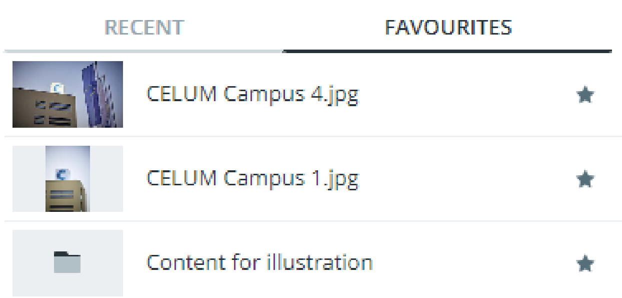
- In the **Explore View:**
    1. Select a favorite collection in the tree.

> You can only select either assets or a collection, not both at the same time.

2. Click the "Remove from favourites" action in the **action area**, **magic menu** or **context menu** to remove a favorite.
3. The collection is immediately removed from the "Favourites" section and the small icon disappears from the collection in the tree.

If only one collection is in the "Favourites" section and you remove the item, then the "Favourites" section also disappears until you add other favorites again.

- In the **Dashboard**, you remove a favorite collection in the **"Favourites" widget** by clicking the small icon:



In addition to saving collections as favorites in the asset list, you can also find the "Favorite" action in the collection picker dialog when **moving or linking assets** to a collection.

Add collections to CELUM Work

CELUM Work, one of CELUM's cloud services, provides seamless collaboration with agile task management and asset handling in one place. In combination with CELUM Content, it makes managing collaborative teamwork easy by adding a CELUM Content collection to a new or existing Workroom.

Once added to a Workroom, the collection is represented by a **folder with the same name** in the asset explorer of the workroom. **The added folder acts independently of the collection in CELUM Content**. This means that actions such as renaming and deleting the collection (in CELUM Content) or folder (in CELUM Work) will not have any impact on the other application.

Prerequisites and permissions

- A **personal CELUM Cloud user account** which is allowed to use your organization's subscribed services and you need to be **connected to it** in CELUM Content.

> The organization you connect to must have a valid subscription for both CELUM Work and CELUM Content.

- The following **role-based permissions** on the **collection you want to add**:

> If you cannot grant these permissions to yourself, contact a power user with super-administrator permissions who can give them to you.
>
> As a power user with super-administrator permissions, you can create roles with these permissions in the **Configuration Management Application (CMA)**, which you can access via the Advanced UI. You can find instructions for this in the **Administrator Guide** in the **Customer Knowledge Base**.

  - **View** the collection
  - **View** assets within the collection
  - **Add** assets and collections
  - **Move** the collection and its child collections and move assets
  - **Add** assets within the collection **to another security context**
  - **Download** assets within the collection
- The **permission to create** Workrooms (if you want to add to a new Workroom).

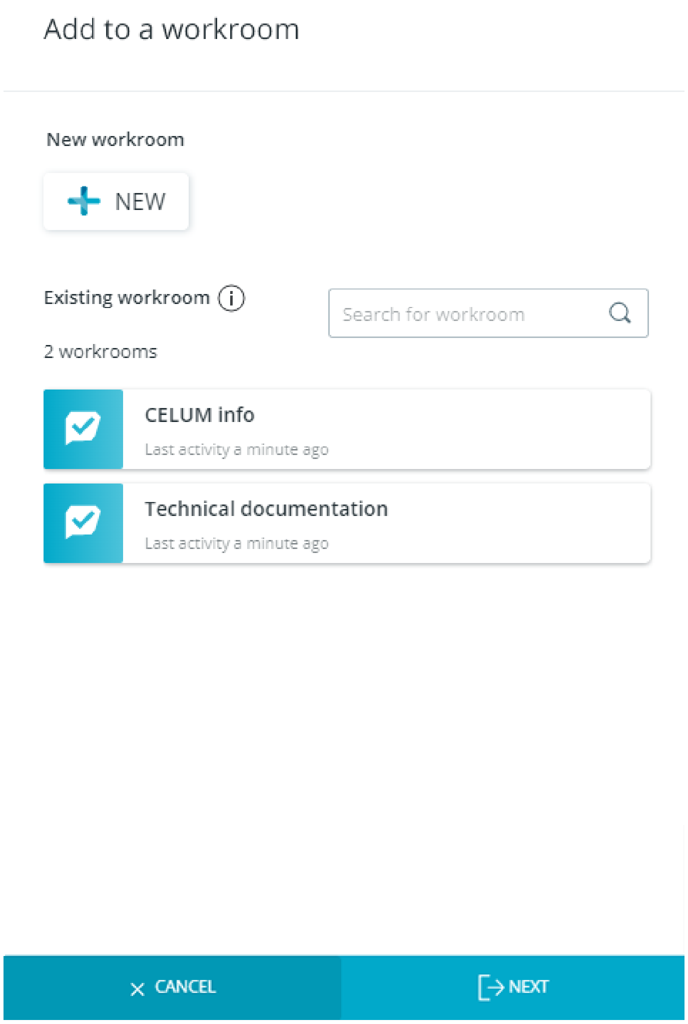
The organisation manager for the organisation that you are connected to can grant this permission to you.

Add a collection to a Workroom

1. Navigate to a collection.
2. Open the context menu on the collection and click "Add to a Workroom", or select the same option in the magic menu.

Under some circumstances, the action or context menu entry is disabled and can't be used. Check the **Q&A section** for more information.

3. You are redirected to CELUM Work (in a new browser tab) and an "Add to a Workroom" dialog opens:



> You only see existing Workrooms in the organisation whose ID you used to **connect to your Cloud account**. A new Workroom will also be created in that organization.

4. There, you can **select between 2 options (depending on your permissions)**:
    - **Create a new workroom and watch the added collection** via a CELUM robot.

> Watching a collection means that any new assets that are added to the collection in CELUM Content will automatically be added to the corresponding folder in CELUM Work as well.

    - **Choose an existing workroom** to add the collection to, and click the "Next" button.
5. After you have created or chosen a Workroom, you are redirected to the asset explorer in the workroom and an "Add to a folder" dialog opens.
6. In the dialog, choose a folder from the list or create a new one. This folder will be the parent folder of the added collection.

> If you've created a new folder, be sure to also select it in the list afterwards to ensure your collection is added where you want it.

7. Click the "Add" button.
8. **If you (as a workroom moderator) chose an existing Workroom in step 4**, a new sub-trigger opens where you can choose between 2 options:
    - **Add collection**: The selected collection and its child collections (and assets therein) will be added. New objects are **not** automatically added after the fact.
    - **Add and watch collection**: The selected collection and child collections (and assets therein) will be added and a robot will be applied on the chosen collection only. You can see applied robots in the Workroom wizard for a given Workroom.

> As a Workroom contributor, you will only see the "Add collection" option. The sub-trigger won't be displayed as contributors do not have the permission to apply robots.

9. A new folder with the same name as the CELUM Content collection is created within the selected folder, containing all assets from the collection as assets.

Added assets will have an "Available in CELUM Work" symbol ☑ and a link to their location in CELUM Work will be displayed in the **sidebar** and **detail view**. If a corresponding asset is permanently deleted in CELUM Work or the Workroom is finished/deleted, the symbol will be grayed out and the link will be removed.

Deleting the collection in CELUM Content

The deletion of a collection that was added to CELUM Work **will not have any impact** on the added folder in CELUM Work. If a Workroom robot was applied on the collection, i.e. the collection was being watched, **the collection will be removed from the robot** and no longer watched.

FAQ and troubleshooting

Why is the "Add to a Workroom" action disabled for some collections?

The "Add to a workroom" menu entry will be disabled if the number of assets in the selected collection structure exceeds 1000.

Furthermore, adding is only possible in a specific collection, but not on the root collection (collection type), in "All assets" view, or on tags.

You can find more information about CELUM Work in the CELUM help portal:

- Create Workrooms
- Apply Workroom robots

Synchronize with CELUM Drive

CELUM Drive is one of CELUM's cloud services and enables you to synchronize content in CELUM Content to your local file system. It comes with a handy desktop app which you install on your local computer.

If the CELUM Drive functionality is subscribed by your organization, you can seamlessly transfer your content from CELUM Content to your local file system. The exact behavior depends on your system's configuration, as described **below**.

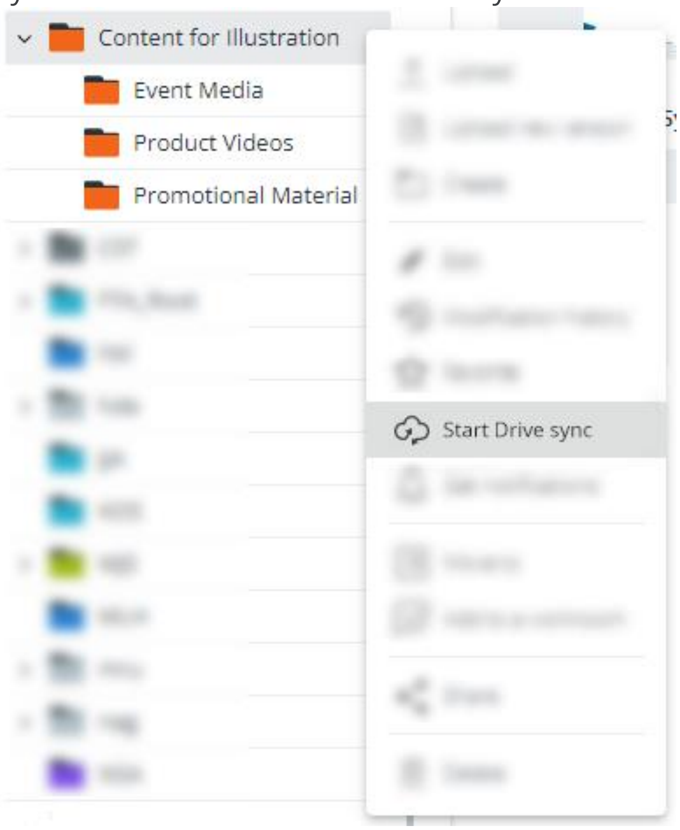
Prerequisites

- You need to have a **personal CELUM Cloud user account** with a permission to use your organization's subscribed services and you need to be **connected to it** in CELUM Content. Your organization must have a valid subscription for CELUM Drive.
- You need to **download the CELUM Drive desktop app** and install it on your computer. You can download the app via the **help menu** in the system bar.

Start synchronizing a collection

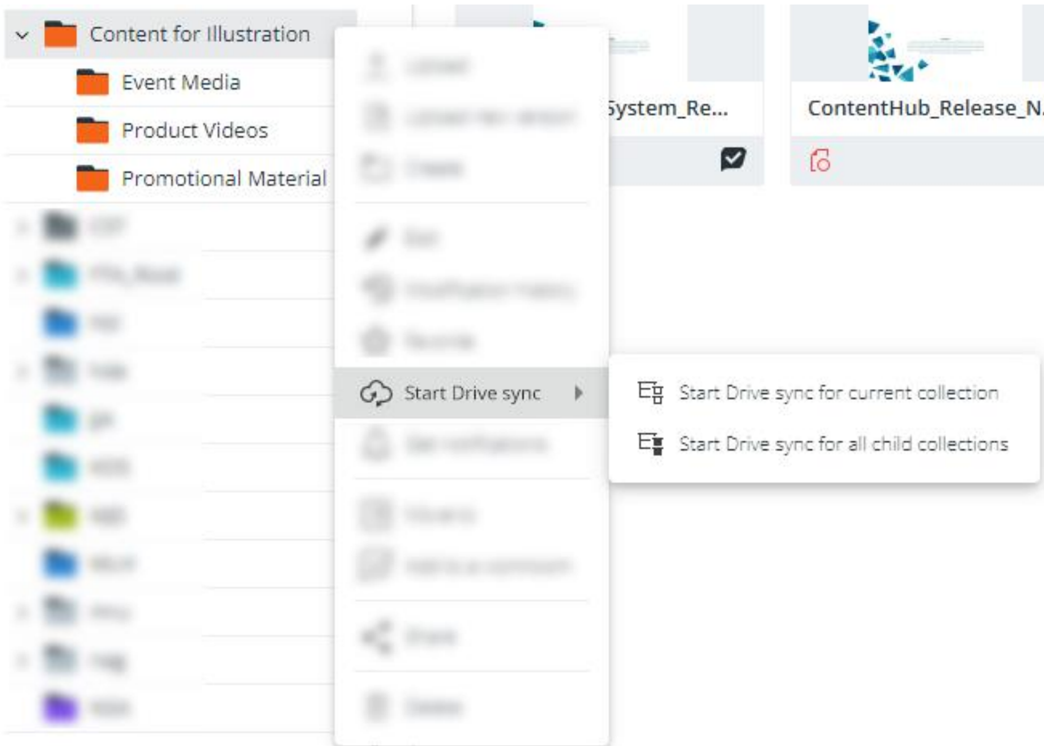
1. Navigate to a collection which you want to synchronize to your local file system.
2. Open the context menu on the collection.
3. In the context menu, find the "Start Drive sync" action.
4. Move your mouse cursor over the action. **Depending on your system configuration**, the following happens:
    - **Nothing happens**: Simply click the "Start Drive sync" action. This synchronizes all assets in the currently selected collection and its child collections into a single flat folder in the CELUM location in your local file

system. No folders are created locally for the child collections.



> This is the default behavior. If you'd like to change this behavior, contact the technical administrator of your CELUM Content server so they can change the configuration.

- **A sub-menu opens**: You can decide between the following use cases in the sub-menu:



  - "*Start Drive sync for current collection*": Synchronizes all assets inside the currently selected collection and its child hierarchy into a flat folder in your local file system. No local folders are created for child collections.
  - "*Start Drive sync for all child collections*": Synchronizes the assets in the currently selected collection's child collections, and recreates the direct child collections as folders in your local file system. Assets inside the current collection itself are not synced.

5. The current collection and/or its child collections are synchronized to your local file system according to the described behavior.

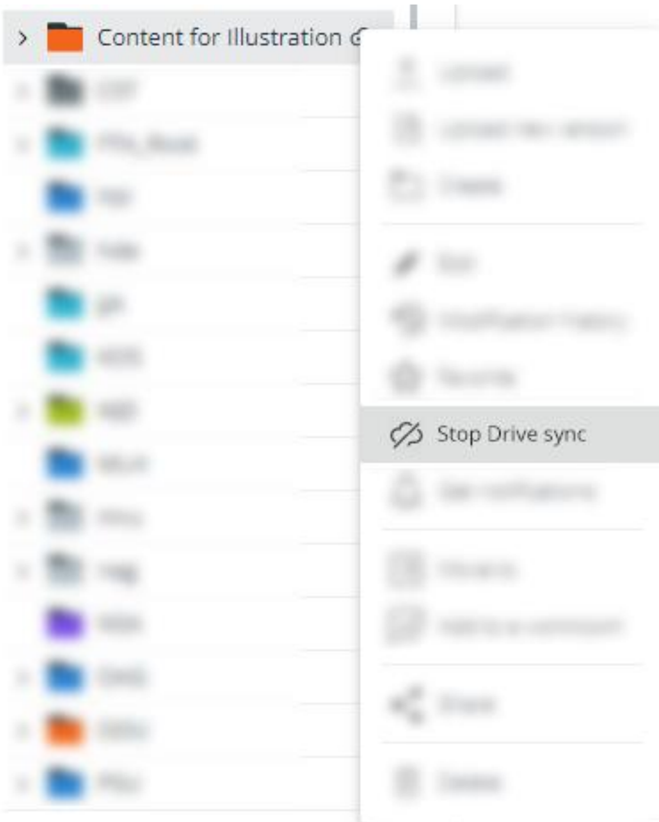
Find more information about the CELUM location in the **CELUM Drive online help** topic "View synchronized files".

Stop synchronizing a collection

1. Navigate to a collection which you are currently synchronizing with CELUM Drive.

2. Open the context menu on the collection and click the "Stop Drive sync" menu entry:

Alternatively, you can stop the Drive sync in the magic menu.



3. The collection is no longer synchronized to your CELUM location.

The unsynchronized directory does not get deleted from your CELUM location (you get to keep all files which were synchronized so far), but no more changes will be received from the collection in CELUM Content.

Some restrictions apply to the CELUM Drive synchronization due to permissions or metadata validation for the collection. Please consult the **online help topic** "Special cases for CELUM Content" for more information.

Delete collections

1. Select a collection in the tree.
2. Use the "Delete" action" in the context menu or magic menu for the collection. A confirmation dialog lists how many assets inside will be deleted along with the collection.
3. Click "Delete" in the confirmation dialog.
4. The collection is permanently deleted from the system.

If an asset inside the deleted collection was also linked to at least one other permission-defining collection, it is still available in that collection and not permanently deleted. If it was only located inside the deleted collection, it is also permanently deleted.

Work with assets

Work with assets

In short, an asset is the representation of a digital file in CELUM Content. Assets are created when you upload files to CELUM Content. They always have an asset type which determines their metadata, and they can be downloaded again in different formats as well as distributed to connected systems.

A word about permissions

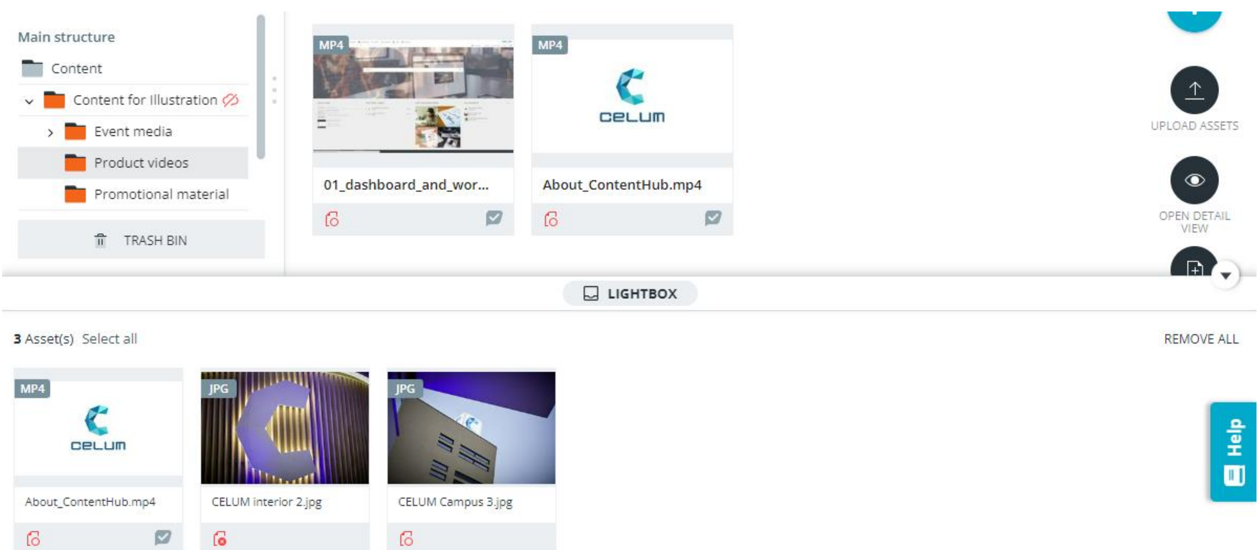
Not all asset types can be used by all users of CELUM Content. Equally, not all users can execute all actions on assets. The permissions are either determined by the user's own type or by the collection that the asset is linked to.

View assets

You can see all assets in the currently selected collection in the **asset list** in the Explore View or the result list of the Advanced Search. There, you can select assets and execute actions on them.

Collect arbitrary assets in the lightbox

The lightbox enables you to accelerate your content flows by creating ad-hoc collections of content from various parent collections. It is located at the lower edge of the Explore View and Advanced Search, and you can expand, collapse, and resize it:



Inside the lightbox, you can select assets, open the context menu or magic menu for them and execute actions for which you have permission. Your permissions inside the lightbox reflect your permissions inside the respective asset's parent collection.

If you lose access to an asset currently in your lightbox, then the lightbox refreshes on your next page refresh or login, and the asset is removed from it then.

Add content to the lightbox

Simply add assets via drag-and-drop or the "Add to lightbox" context menu entry. Newly added assets are added at the front of the list.

At maximum, there can be 200 objects inside the Lightbox.

Remove content from the lightbox

To remove selected content from the lightbox, simply click on the "Remove selected objects" or "Remove all" action in the top right corner of the lightbox. Additionally, you can use the "Remove from lightbox" action in the context menu or magic menu for a selected asset.

Get more information

- **Create assets**
- **Organize assets in collections**
- **Download assets**
- **View asset information**
- **Edit asset metadata**
- **Manage asset versions**
- **Manage asset relations**
- **Compare assets**
- **Share assets**

Adapt the asset list

The asset list shows all assets in either the Explore View or Advanced Search, depending on search results or selected collection. You have multiple ways to adapt

- which objects are shown in the asset list,
- which information is shown about the objects, and
- how they are sorted.

Adapt view mode and shown objects

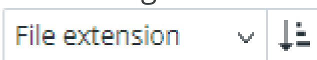
The **content bar** above the asset list offers various ways to change which content is displayed in the asset list and how it is displayed:

- Activate the "Show content of child collections" check box to show both assets inside the currently selected collection and assets inside its chidl collections.
- To sort the assets in the asset list, choose a property to sort by from the sorting drop-down menu and click the respective button for the sorting order, which reflects the current sort order:
    - The asset list is currently sorted in descending order. Click this button to sort ascending.
    - - The asset list is currently sorted in ascending order. Click this button to sort descending.
- Click or to show the asset previews in either a table with the most important information about each asset, or as larger thumbnails without additional information.
- If the thumbnail layout is activated, you can switch between three thumbnail sizes using the respective buttons:
- Click to expand or collapse the **sidebar** and show a larger asset preview and all asset metadata for a selected asset.

Sort assets

Sorting works in two ways, depending on whether the asset list is shown in **list view or card view**:

- **In list view**: A small arrow icon next to a column's name indicates that the asset list is sorted by this column. The arrow points **down** when the asset list is sorted in **descending** order and **up** when the asset list is sorted in **ascending** order. By default, the assets are sorted by the "Modification date" column. To sort the asset list by a different column, just click the column header (name) of another column. The asset list will then be sorted in ascending order. Click the column header again to sort in descending order.

- **In card view**: The content bar contains a drop-down menu with different sorting options to choose from. Additionally, you can switch between ascending order and descending order with a small button next to the drop-down:


Rearrange columns in list view

If the asset list is shown in list view mode, you can rearrange the asset list columns.

To **move** a column to a different position, simply hover over the column header, drag the column header with your mouse, and drop it to the new position. To **resize** a column, hover over the column name and drag the resize handler on the right side with your mouse to decrease or increase the column width.

Choose displayed columns and language

When viewing objects in the list view, you can choose which information about them you want to see and in what language.

In order to do so, you must first switch from card view to list view using the content bar icon .

To add or remove a column in the asset list:

1. Click the menu icon ⋮ in the top right corner of the list.
2. The asset list configuration menu appears. There, check the boxes for information fields or properties you want to display in the asset list.

For some fields, you can display the content in **multiple languages**.

3. Click "APPLY" at the bottom of the menu.
4. The selected fields are displayed as new columns in the asset list and are marked with a blue check mark in the asset list configuration menu. Once you re-enter the menu, all active fields will be displayed in alphabetical order at the top of the menu.

The maximum number of displayed columns can be configured according to your company needs. By default, you can add **up to 15 columns** to your asset list.

To remove a column from the asset list, **uncheck the field** in the asset list configuration menu.

You can also **save your column configuration** or **load** an already saved one.

Add a language column for a field

You can show some selected fields in the asset list in multiple languages:

1. When you select a localized field in the column list, a new "Add language" button appears on it:


2. Click the button. A list with all configured languages appears.

If a field does not have multiple locales enabled, the "Add language" button will not appear.

3. There, check the box next to a language, or click "select all" to choose all languages. If the number of selected languages is greater than the configured maximum number, a warning message will appear.
4. For each activated language, a new column appears:


To remove a language column, deselect the language in the asset list configuration menu.

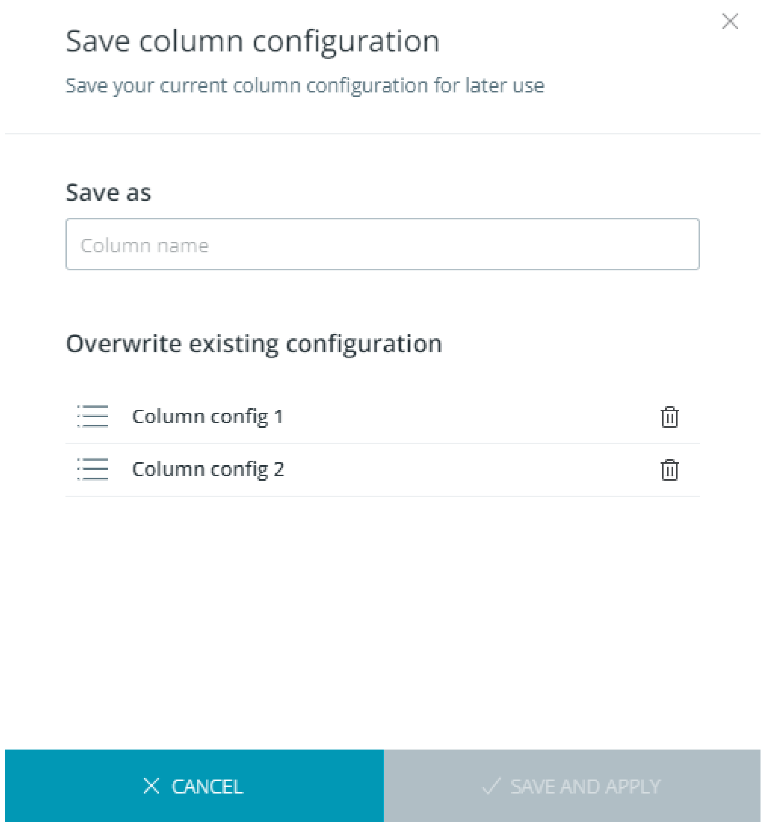
You can only deselect the default language if an additional language has already been selected for the field.

Save and load the column configuration

In the asset list configuration menu, you can **save a column configuration**:

1. Once you've chosen suitable columns, click the "Save" button at the bottom of the menu.

2. A new dialog opens and shows all your saved configurations:



3. In the dialog, enter a name for your current configuration.

> If you enter the same name as or select an already existing configuration, you can **overwrite** it upon saving.

4. Click "Save and apply" (if you entered a new name) or "Overwrite and apply" (if you selected an existing configuration).

> **Information that gets saved**
>
> For each column configuration, the **selected columns**, their **widths** and **order** in the asset list are saved. So, if you rearrange columns and save the new arrangement as a new column configuration, the order will be persisted if you load it again.

5. The dialog closes and the chosen columns are immediately applied to the asset list.

Furthermore, you can **load a saved column configuration** again:

1. Click the "Load" button at the bottom of the menu.

2. A new dialog opens and shows all your saved configurations.
3. Click a configuration in the dialog to select it.
4. Click "Load".
5. The dialog closes and the loaded configuration is immediately applied to the asset list.

During both saving and loading of configurations, you can **delete an existing configuration** via the "Delete" button 🗑.

Create assets

There are several ways to create new assets in CELUM Content:

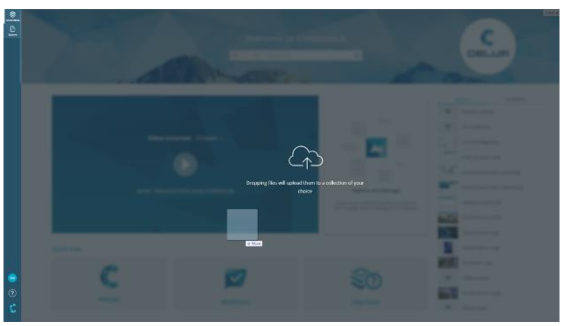
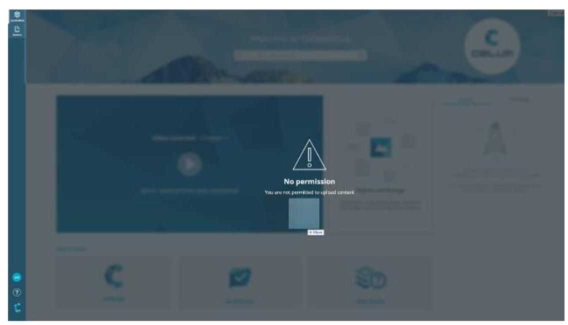
- **Manually upload** them in the Explore View
- **Programmatically** via API
- Via **CELUM Drive**

Upload assets manually

You can upload assets to CELUM Content in three different ways:

- Via **drag and drop** on any view of the application, e.g., on the Dashboard or in the Explore View

> The drag and drop upload depends on your **global upload permission** as well as the **local permission "Add assets"** (if you have selected a collection). You get immediate feedback from the application when dragging assets onto it:

- Via the **upload widget** on the Dashboard

> The upload widget is only available if you have the **global upload permission**.

- Via the **"Upload assets" direct action** in the Explore View's action area and magic menu

> The direct action is only available if you have the **global upload permission** as well as the **local permission "Add assets"** (if you have selected a collection).

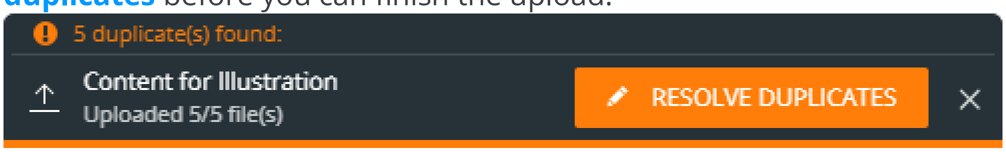
The general process for uploading is the same for every method:

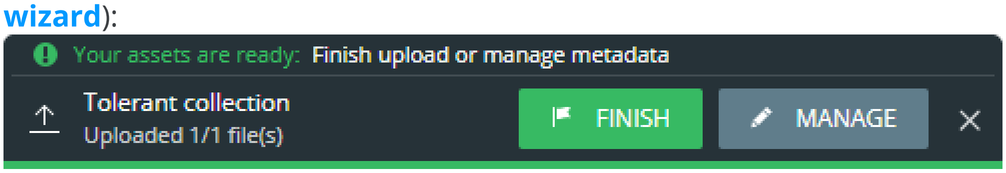
1. If upload is possible, start the upload with one of the upload methods.

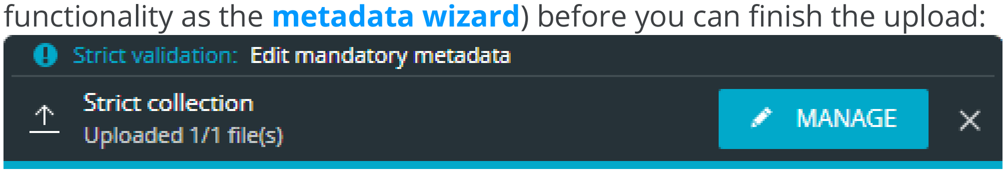
2. If you haven't selected a specific collection in advance (or have selected a non-permission-defining collection), a collection picker dialog opens.
3. On the right side of the dialog, choose a **target collection** to which you will upload the assets.

Upload is only possible to **permission-defining collections**, therefore, you can only browse through permission-defining collection types on the left side of the dialog.

Collections can either be *permission-defining*, which means the permissions for assets are set on their parent collection, or *non-permission-defining*, which means that the parent collection has no influence on assets' permissions. See **The CELUM Content permission system** for more information.

4. Click "Upload" once you have chosen a target collection.
5. In the lower left corner of the application, a progress snackbar shows the upload status:
    - If the **duplicate check** has detected that one or more of the uploaded assets already exist as assets in your CELUM Content, you must first **resolve the duplicates** before you can finish the upload:


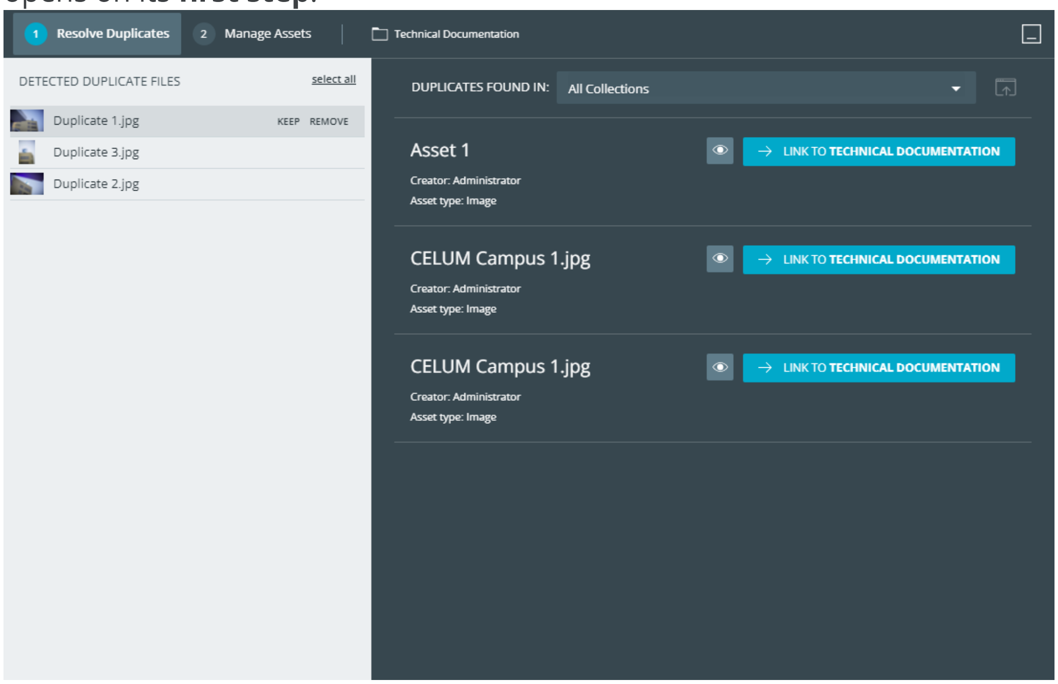
    - If you've chosen a collection with **tolerant metadata validation**, you can **finish** the upload directly in the snackbar or optionally manage the new assets' metadata in the upload wizard (same functionality as the **metadata wizard**):


    - If you've chosen a collection with **strict metadata validation**, you must next **manage the new asset's metadata** in the upload wizard (same functionality as the **metadata wizard**) before you can finish the upload:


Metadata validation

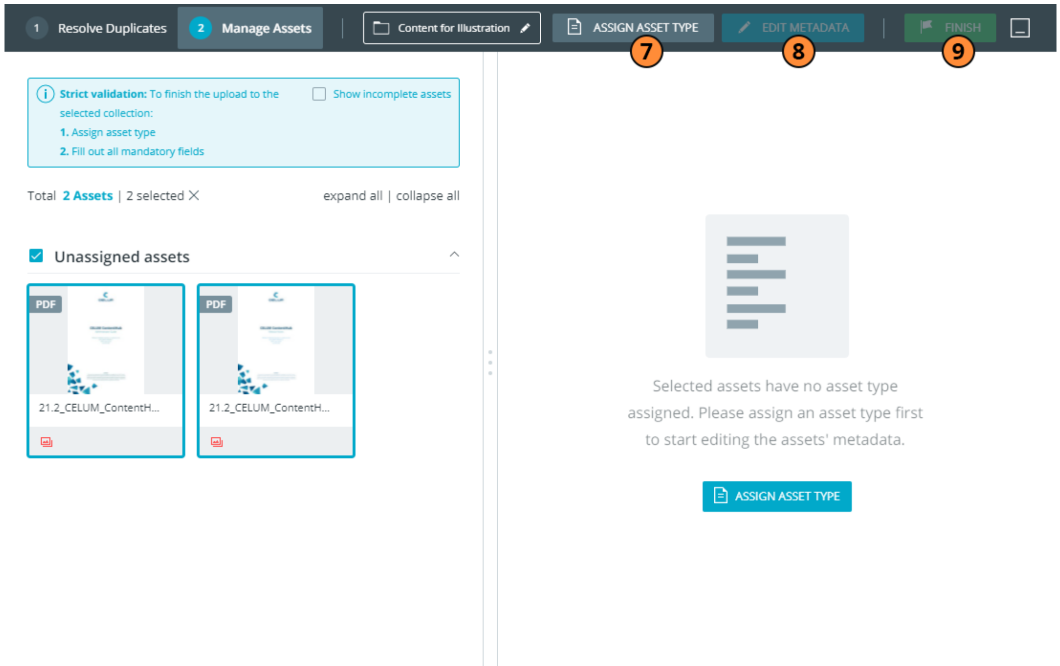
Metadata validation describes the way in which the metadata of a collection and the assets within are validated. There are two types of metadata validation for collections – *strict* and *tolerant*. You can only upload assets to a *strict* collection if all required asset information fields are filled. The asset's metadata status doesn't matter for *tolerant* collections.

6. Depending on the available buttons in the snackbar, you have the following options for continuing the upload:
    - If duplicates are found, click "**Resolve duplicates**". The **upload wizard** opens on its **first step**:



See the topic "**Resolve duplicate assets**" for instructions for that step of the upload wizard.

- If no duplicates are found, click "**Manage**" in the snackbar. The **upload wizard** opens on its **second step**:



If you've uploaded to a **strict** collection, you must manage the metadata in order to conclude the upload. If you've uploaded to a tolerant collection, managing is optional.

7. Assign an **asset type** to your newly uploaded assets to associate a set of metadata with them (7).
8. Edit the assets' metadata and add at least the values for all **mandatory metadata** (8).
9. Once you have filled the new assets' mandatory metadata, finish the upload with the "Finish" button (9).

If you don't have permissions to edit all mandatory fields, you can't finish the upload. Therefore, in the second step, you may need to choose either a different asset type or a different target collection:

Create assets via API

CELUM offers a powerful REST API which allow you to create new assets programmatically or to allow your own customers to create assets via self-developed extensions.

Also available is the Nova API, which is specifically suited for developing Nova extensions.

- You can find information on how to develop against the CELUM APIs in the **Customer Knowledge Base**.
- Nova API documentation is integrated into CELUM Content. To access its specification, please open the **CELUM Content Server URL** using the following:
    - <CELUM Content base URL>/main/nova-app/storybook/index.html
    - <CELUM Content base URL>/main/nova-app/docs/nova-api/index.htm

Synchronize new assets with CELUM Drive

Synchronizing a collection with CELUM Drive will equally synchronize all assets inside. You can create new assets directly inside the CELUM location on your local file system and they will be uploaded as new assets.

Further information

The topic **Synchronize with CELUM Drive** explains how to start the CELUM Drive sync in CELUM Content.

The CELUM Drive online help contains further information on how to manage the CELUM Content sync.

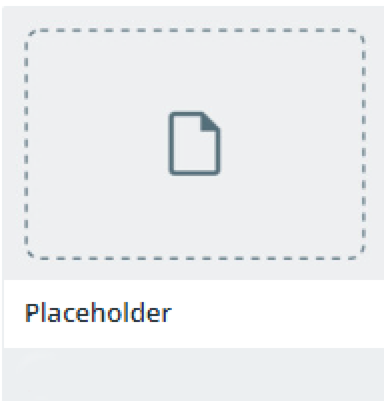
Next steps:

After you have uploaded the assets, you can **assign or switch their asset type** to them or **edit their metadata**.

Create placeholder assets

Placeholder assets are "empty assets" that enable you to create an asset without uploading a file to CELUM Content. Such assets can already be assigned asset types and metadata and also added to a Workroom in CELUM Work while the file itself can be uploaded at a later stage.

All placeholder assets are represented by a special preview:



To create a placeholder asset:

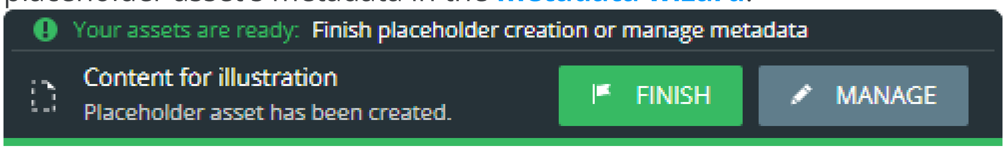
1. Go to the Explore View.
2. Click the "Create placeholder asset" action in either the context menu, action area, or magic menu.

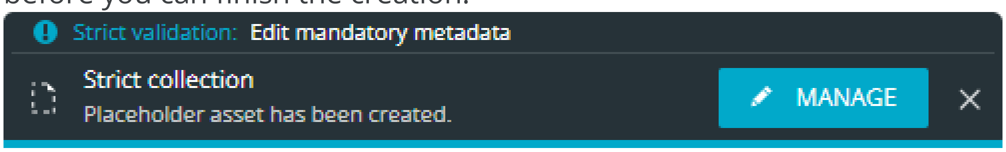
> To see the action, you need the same permissions as for uploading an asset:
>
> - global upload permission
> - local "Add assets" permission

3. If you haven't selected a specific collection in advance (or have selected a non-permission-defining collection), a collection picker dialog opens.
4. On the right side of the dialog, choose a **target collection** in which you will create the placeholder asset.

> Creation is only possible in **permission-defining collections**, therefore, you can only browse through permission-defining collection types on the left side of the dialog.
>
> Collections can either be *permission-defining*, which means the permissions for assets are set on their parent collection, or *non-permission-defining*, which means

that the parent collection has no influence on assets' permissions. See **The CELUM Content permission system** for more information.

5. Click "Create" once you have chosen a target collection.
6. A snackbar will appear indicating the placeholder asset is ready:
    - If you've chosen a collection with **tolerant metadata validation**, you can **finish** the creation directly in the snackbar or optionally **manage** the placeholder asset's metadata in the **metadata wizard**:


    - If you've chosen a collection with **strict metadata validation**, you must next **manage the placeholder asset's metadata** in the **metadata wizard** before you can finish the creation.


Metadata validation

Metadata validation describes the way in which the metadata of a collection and the assets within are validated. There are two types of metadata validation for collections – *strict* and *tolerant*. You can only upload assets to a *strict* collection if all required asset information fields are filled. The asset's metadata status doesn't matter for *tolerant* collections.

7. Once you have finished the creation process, the placeholder asset is shown in the asset list and available to other users.
8. When it is time to turn your placeholder asset into a regular asset (with binary file), simply upload a file as a **new version** for it.

Automatic creation of placeholder assets in compound objects

To save time and effort, you can also automatically create placeholder assets for all missing elements in a compound object. Simply use the "**Create missing elements**" action on the compound object.

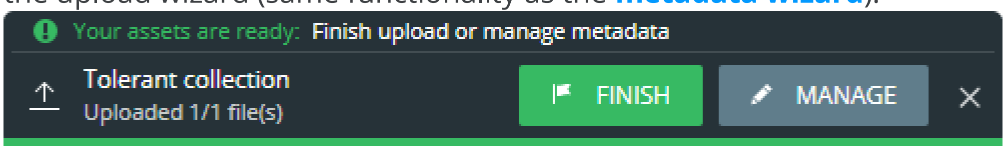
Manage the upload

You can monitor and manage the upload of new assets while it is in progress.

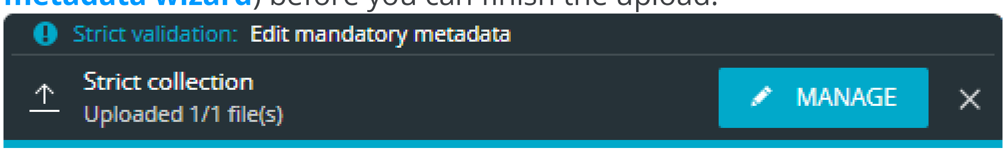
Monitor the upload progress

When the upload starts, a small progress **snackbar** appears in the lower left corner of the application. When the progress is completed, it displays additional actions depending on the chosen target collection:

- If you've chosen a collection with **tolerant metadata validation**, you can **finish** the upload directly in the snackbar or optionally manage the new assets' metadata in the upload wizard (same functionality as the **metadata wizard**):



- If you've chosen a collection with **strict metadata validation**, you must next **manage the new asset's metadata** in the upload wizard (same functionality as the **metadata wizard**) before you can finish the upload:



Pause the upload

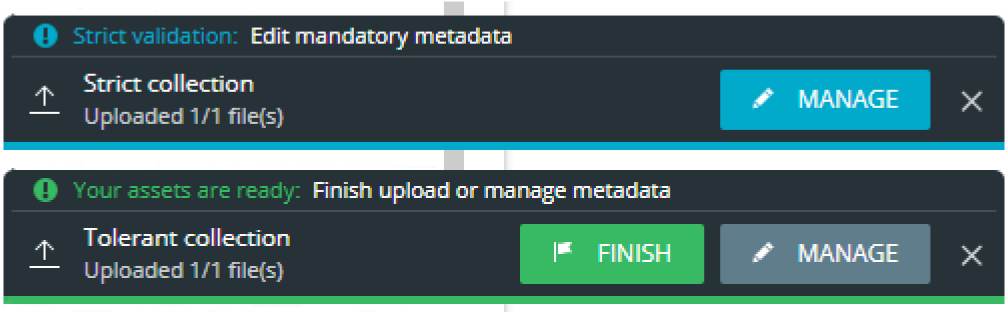
You can pause an upload once its progress snackbar is shown in the lower left corner of the screen. The uploaded assets will be kept in a cache as long as the snackbar is still available, i.e. the upload has not been canceled or finished. However, they won't be released to the system yet and won't be available for other users.

In the upload wizard, you can pause the upload by minimizing the wizard back into the snackbar with the minimize button in the upper right corner of the overlay.

The snackbar will also still be available if you log out and log in again, so you can finish the upload at any time.

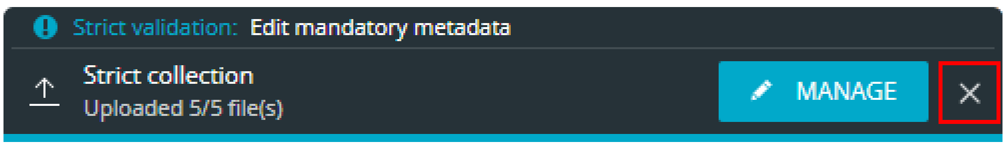
Multiple uploads

You can also start multiple uploads and keep their snackbars around. In this case, the snackbars will be shown stacked above each other, with the newest upload at the bottom:



Cancel the upload

You can cancel the upload in the progress **snackbar**. Just click the small ✕ icon on the left side of the snackbar to cancel the upload:



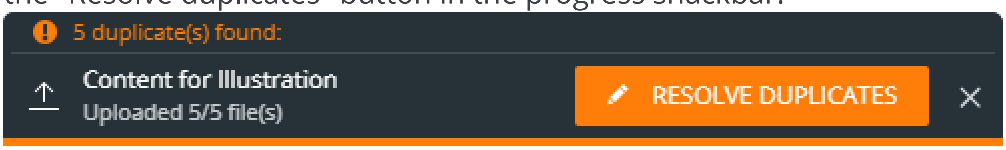
Resolve duplicate assets

The CELUM Content duplicate check automatically recognizes duplicate assets on upload. Once duplicates are detected, you can decide which actions to take. This way, any redundant asset upload is avoided, contributing to a better organization of your stored assets.

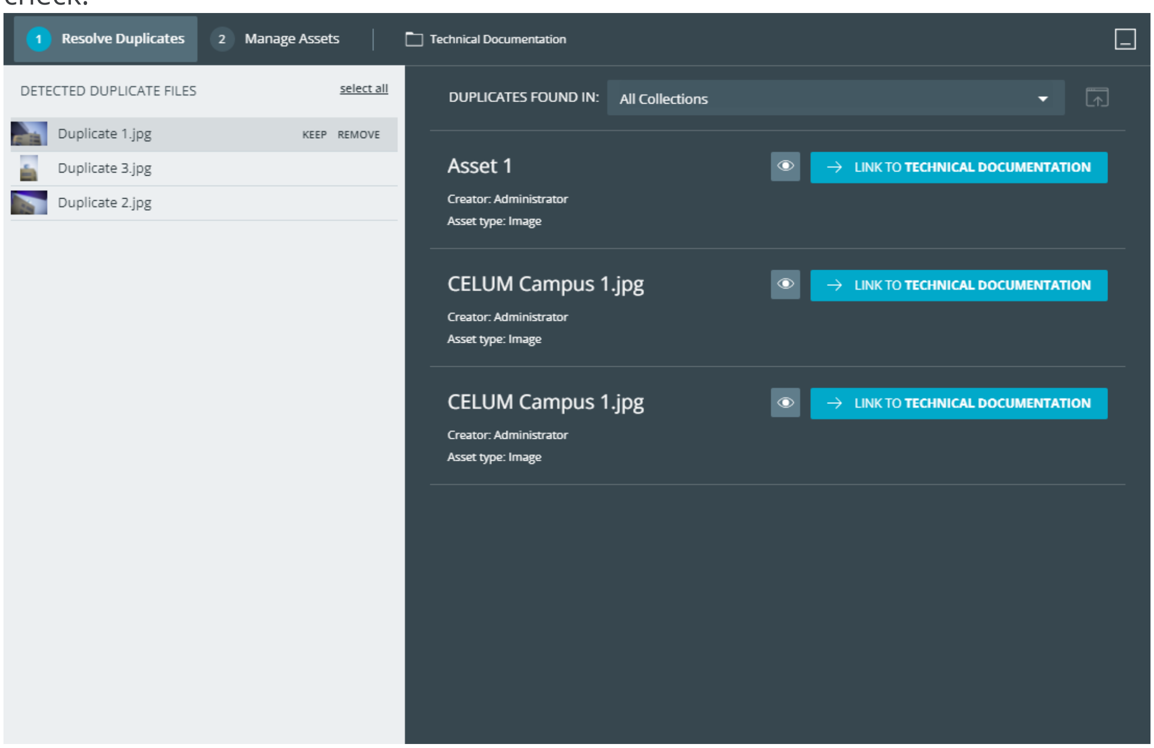
Duplicate check is done on asset content and against current asset version

Uploaded assets are only detected as duplicates when the asset content (binary) of the asset is exactly the same as the binary of an existing asset. Additionally, only the **current version** of each existing asset is checked. Previous versions are not compared.

Once you have started the upload of assets to CELUM Content, all assets are checked for duplicates. If duplicates are found when the upload is finished, you can resolve them with the "Resolve duplicates" button in the progress snackbar:



1. Click "Resolve duplicates". The **upload wizard** opens on its **first step**, the duplicate check:



The duplicate check step consists of two areas:

- On the **left side**, the duplicate list shows all newly uploaded assets for which duplicate assets have been found in the system.
- On the **right side**, all existing assets that match the currently selected duplicate are shown. You can choose between seeing the existing assets in all available collections, or in a single specific collection.

2. Select one, multiple or all assets in the duplicate list and resolve the duplicate conflicts in one of three ways:
    - Click "**Keep**" to upload the selected duplicate assets as new assets.
    - Click "**Remove**" to cancel the upload for the selected duplicate assets.
    - Click the button "Link to <target collection>" for one of the existing assets on the right side to put it into the target collection instead of the duplicate asset.

You can also open the asset's detail view in a new tab with the "View" icon .

This button will be disabled under the following conditions:

- Target collection is strict and the existing asset is missing mandatory metadata.
- The asset is already linked to the target collection.
- You don't have the "Add to other security context" permission for assets in the current parent collection of the existing asset.

3. All resolved assets will be cleared from the duplicate list.
4. Once all duplicates have been resolved, the upload wizard jumps to the **second step** of the upload wizard, where you can assign asset types and edit metadata for your newly uploaded assets.

Organize assets in collections

Collections serve as organizational units to categorize assets. Assets can be located in one or multiple collections, according to your needs.

Move assets between collections

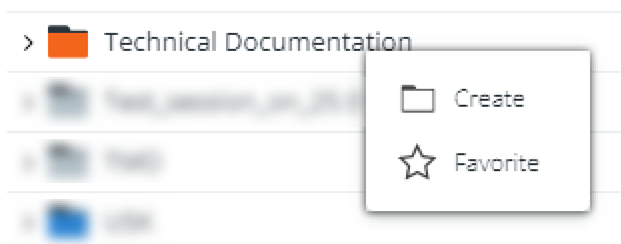
In order to move an asset to a specific collection, you need the **local "Add asset" permission** for the target collection. Additionally, you need the **local "Move asset"** permission for the source collection.

If you have none of the necessary permissions on any collections, you'll still see the action, but will get an "Insufficient permissions" dialog upon clicking.

Select one or multiple assets in the asset list. You have 2 ways to move the selected asset(s):

- Use the **"Move" action** in either the context menu or the magic menu:
    1. A collection picker dialog opens. Choose a target collection for the asset(s) in the dialog.

You can also choose one of your **favorite collections**, or add a **new favorite**, or **create a new collection** in the context menu directly inside the dialog:



If a collection is grayed out, it means you may not move assets to it. A tooltip explains the reasons for this.

2. Click "Move" to confirm the dialog and move the asset(s) to the selected new parent collection.

- **Drag and drop** the selected assets to the target collection.

If the action is not possible, a tooltip next to the mouse cursor shows the error message:

Undo moving of asset(s)

This action is only possible when moving via drag and drop.

To undo moving of assets, click the "undo" button in the "Move asset(s)" progress snackbar.

Link assets to multiple collections via direct action

In order to link an asset to a specific collection, you need the **local "Add asset/collection" permission** for the target collection as well as the **"Add asset to other security context" permission** on the current parent collection (and hence on the asset itself).

Select one or multiple assets in the asset list or lightbox. You have 2 ways to link the selected asset(s) to an additional parent collection:

- Use the **"Link" action** in either the context menu or the magic menu.

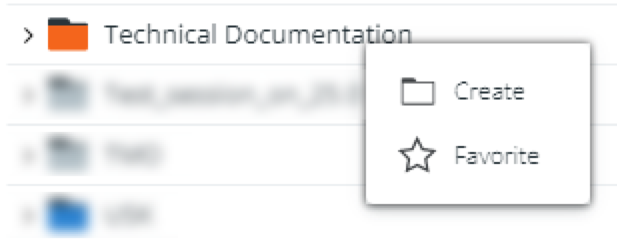
The "Link" action is available in both Explore View and Advanced Search. However, under the following circumstances, you will receive an error dialog instead of the collection picker when clicking the action:

- At least one of the selected assets is in a permission-defining collection without the "Add to other security context" permission AND
- You're not allowed to see any non-permission-defining collection types.

-

1. A new collection picker dialog opens. The dialog has a three-column layout:
    1. The left column lists all available collection types. Click on a collection type name to select it.
    2. The middle column lists all collections of the selected collection type which you are allowed to link assets to. Click on a collection name to select the collection as an additional parent for the assets.

You can also choose one of your **favorite collections**, or add a **new favorite**, or **create a new collection** in the context menu directly inside the dialog:



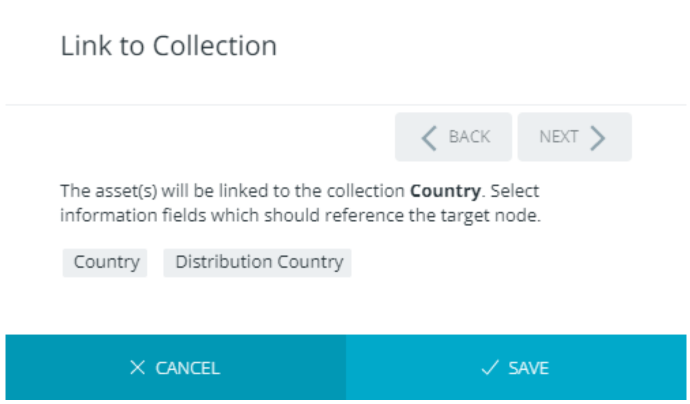
If a collection is grayed out, it means you may not link assets to it. A tool-tip explains the reasons for this.

3. The right column lists all collections which the assets will be linked to.

2. Click "Link" to confirm the dialog and link the assets to the selected collections. The assets still remain in their original collection, as well.

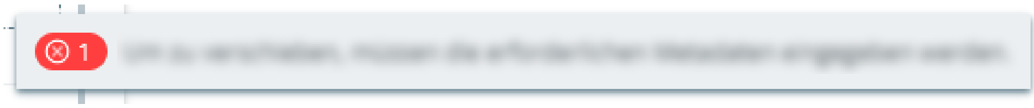
If the **Linking Feature** is enabled for your CELUM Content server, and if the chosen collections **can be referencing drop-down fields values** (such as tags), they will automatically be added to the assets' metadata.

If the target collection can be referenced in multiple fields for the current asset, a dialog appears where you can select which fields should be updated:



- Press and hold the **ALT button** on your keyboard and **drag and drop** the selected assets to the target collection.

If the action is not possible, a tooltip next to the mouse cursor shows the error message:



Please check the **Troubleshooting** section for information on when such error tooltips may occur.

Link assets to multiple collections via compare view

When **comparing 2 assets**, you can link either of them to additional collections:

1. Open the context menu  for one of the assets.
2. Click "Link" in the context menu. A collection picker opens.
3. In the collection picker, pick one or multiple collections that the asset should be linked to.
4. Click "Link" to confirm your choice.
5. The asset is now also located in all chosen parent collections.

Link assets to collections via metadata linking

The CELUM Content Linking Feature enables you to link assets to collections that are also **values in referencing drop-down fields for the assets**.

Before linking an asset via metadata editing, the asset has to have an asset type assigned and mandatory metadata set. Additionally, the Linking feature needs to be enabled for your CELUM Content server if it isn't already.

To link assets to collections during metadata editing:

1. Edit selected asset's metadata via:
    - **detail view** for editing a single asset's metadata, or
    - **the direct "Edit Metadata" action** for editing single or multiple assets' metadata.
2. Navigate to the referencing drop-down fields and select one or more values (which also exist as collections in the system).
3. Save the changes in the assets' metadata.

4. The values will be added to the metadata fields and the assets will be linked to the respective collections.

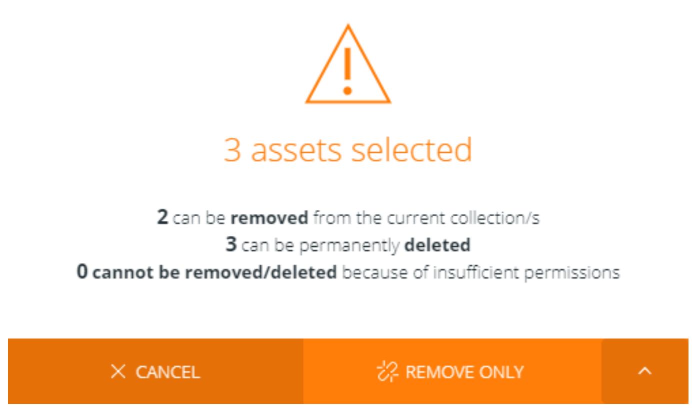
It depends on your CELUM Content server's configuration whether all or only specific referencing drop-down fields will trigger automatic linking to collections.

If you change the asset type, the referencing drop-down fields may change. If this is the case, the added metadata will be lost and the assets removed from the respective collections.

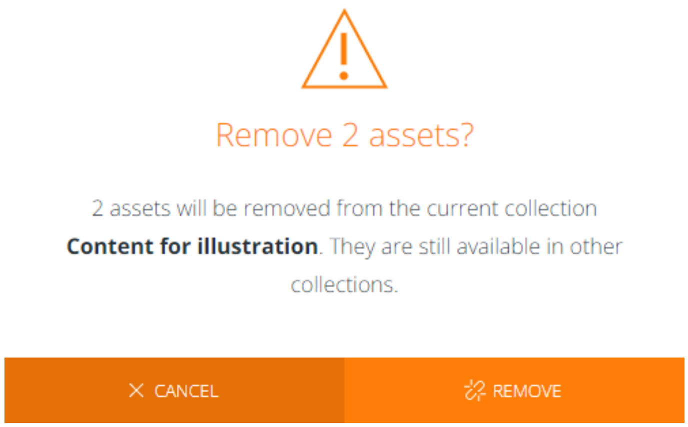
Remove assets from a collection via direct action

Unlike **permanently deleting** assets from the entire CELUM Content system, you can simply **remove** assets from a collection if the assets are still located in other permission-defining collections as well.

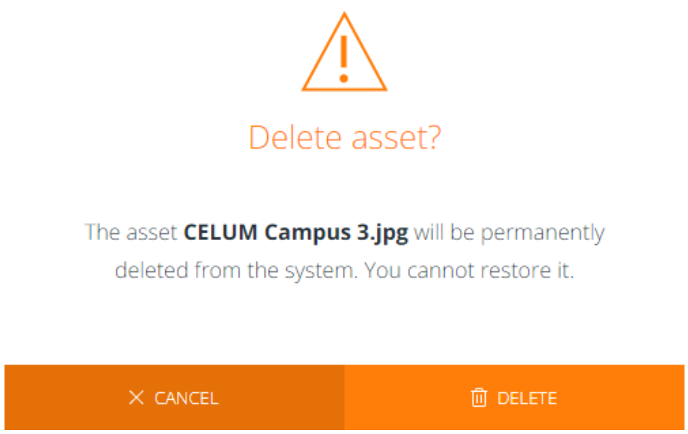
1. Select one or multiple assets in the asset list or lightbox.
2. Use the "Delete" action in either the context menu or the magic menu. A confirmation dialog opens.
3. The confirmation dialog shows different content depending on the status of the selected asset(s):
    - If at least one asset is linked to multiple permission-defining collections, you will see a list of assets which can be removed from their parent collection or permanently deleted. You can then decide if you want to only remove those assets from their collection(s) or permanently delete all assets from the system:



    - If all selected assets are linked to multiple permission-defining collections but you lack the local "Remove asset" permission on one of the parent collections, you can only remove them from the current collection:



- If all selected assets only have one permission-defining parent collection, you can only delete them completely:



4. Depending on your asset selection, you can click either "Remove only" or "Remove" directly in the dialog footer in order to only remove assets from the current collection without deleting them.
5. The assets are removed from the current collection but will remain in other collections to which they were linked.

If the **Linking Feature** is enabled for your CELUM Content server and if the collections from which the selected assets were removed were also **referencing drop-down fields values for the current assets** (such as tags), they will automatically be removed from the assets' metadata.

Remove assets from a collection via metadata unlinking

The CELUM Content Linking Feature enables you to remove assets from collections that are also **values in referencing drop-down fields of the assets**.

To remove assets from collections during metadata editing:

1. Edit selected asset's metadata via:
    - **detail view** for editing a single asset's metadata, or
    - **the direct "Edit Metadata" action** for editing single or multiple assets' metadata.
2. Navigate to the referencing drop-down fields and remove the selected values/collections, or click "Clear all" to remove all selected values.
3. Save the changes in the assets' metadata.
4. The values will be removed from the metadata fields and the assets will be removed from the respective collections.

Open the parent collections for an asset

You can directly jump to a collection that an asset is linked to or that an asset references in one of its information fields:

1. Open the sidebar for a selected asset.
2. In the sidebar sections "Locations" and "Tags/References", click one of the collections that the asset is assigned to.

> Every part of the collection path is clickable, so you can also open a collection on a higher level of the hierarchy.

3. The collection is loaded and selected in the tree and its contents are shown in the asset list.

FAQ and troubleshooting

Can I link collections to multiple parent collections?

No, unlike assets, a collection can only have exactly one parent collection.

I can't link my selected assets to the intended parent collection. The drag & drop does not work.

Under the following circumstances, you can't link assets to a specific additional collection via drag & drop:

- You're trying to link to a **strict collection** and some of the selected assets have **invalid metadata**.
- You don't have the local "Add asset to other security context" permission on the current parent collection.
- You don't have the local "Add asset" permission on the intended target collection.
- The target collection is a **tag**.

View basic asset information

To view basic object information, look no further than the **asset list** in the Explore View or Advanced Search. In the **list view**, the asset list shows basic asset properties organized in columns:

The exact default columns depend on your system's configuration. Below are just some examples.

- Name
- File type
- File size
- Created by
- Created (date and time)
- Modified by
- Modified (date and time)
- Metadata status

To view more information about a selected asset, open the **sidebar** with the button in the content bar. The sidebar slides in from the right side of the asset list and shows all asset metadata in two tabs:

- **Information**: This tab shows the following basic information about the selected object:
    - A slightly larger preview image.
    - General information like ID, name, creation date and time, asset type, and asset size.
    - All **permission-defining collections** that the selected asset is linked to under "Locations".

If the asset is an element in a compound object, then the object's compound status is shown in a coloured bullet:

- Evaluating - The status of the compound object is currently being evaluated.

- Complete - All rules of the compound type are satisfied, assets for all required elements are present.
- In progress - All rules of the compound type are satisfied, but assets for all required elements are not yet present.
- Error - The rules of the compound type are not satisfied. For example, the collection contains child-collections even though the compound type does not allow them.

If you move your mouse over the status bullet, you will see a short summary of the compound status. To view a more detailed list of status messages, a new action on both compound objects and their elements is available. See the "View details about the compound status" **section below**.

- All **non-permission-defining collections** that the selected asset is linked to under "Tags & Links".
- All Workrooms that the selected asset was added to under "Added to Workrooms".

If you are not a part of the Workroom(s) in question, you won't see the Workrooms.

- Existing PIN-Codes.

- **Metadata**: This tab shows all available information fields for the asset. The fields are organized and collected in various information categories, depending on your system configuration.

You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting.

You can find more information about this setting in the "**View all asset information**" article.

View the asset status

The asset list shows you a quick overview of an asset's metadata status in the form of "**bullets**". Bullets are small information icons which show a specific symbol to indicate the status of an asset, for example if an asset is unreleased, is missing required metadata, or is locked.

In the asset list's **list view**, you will find the bullets in the dedicated "Metadata" column. In the asset list's **card view**, you will find the bullets directly below each asset card.

Move your mouse over a bullet to see more detailed information about the indicated status.

Available bullets

The CELUM Content application is highly configurable, so only a small set of standard bullets is available out-of-the-box. Your application may have additional bullets configured or may be using different icons for its bullets.

 The selected asset has no asset type assigned.

 The selected asset has valid metadata (e.g. all required information field values).

 The selected asset is missing required information field values.

 An error occurred during the conversion of the asset either during upload or download.

 The asset is locked for modifications, either because it was locked explicitly or because another user is currently editing its metadata.

 The asset's availability is set to "Not available". Depending on their permissions, not all users may be able to view, edit, or download these assets.

 If more than a certain number of bullets are shown for an asset, the specific bullets are hidden behind this general information bullet. Move your mouse over the bullet to see all specific status information.

 **If active**, the asset has been added to or from CELUM Work and is still available in CELUM Work. **If inactive**, the asset has been added to or from CELUM Work, but is no longer available in CELUM Work.

View details about the compound status

If an asset is located inside a **compound object**, its own metadata values are taken into account for evaluating the **compound status** of the compound object. Via the context menu, you can see more details about issues with the asset's metadata that prevent the compound object from being valid:

1. Right-click the asset in the asset list to open the context menu.
2. Click the "View compound status details" menu entry. A new dialog opens.

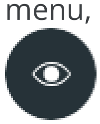
3. The dialog lists detailed descriptions of issues to help you resolve them.

View all asset information

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

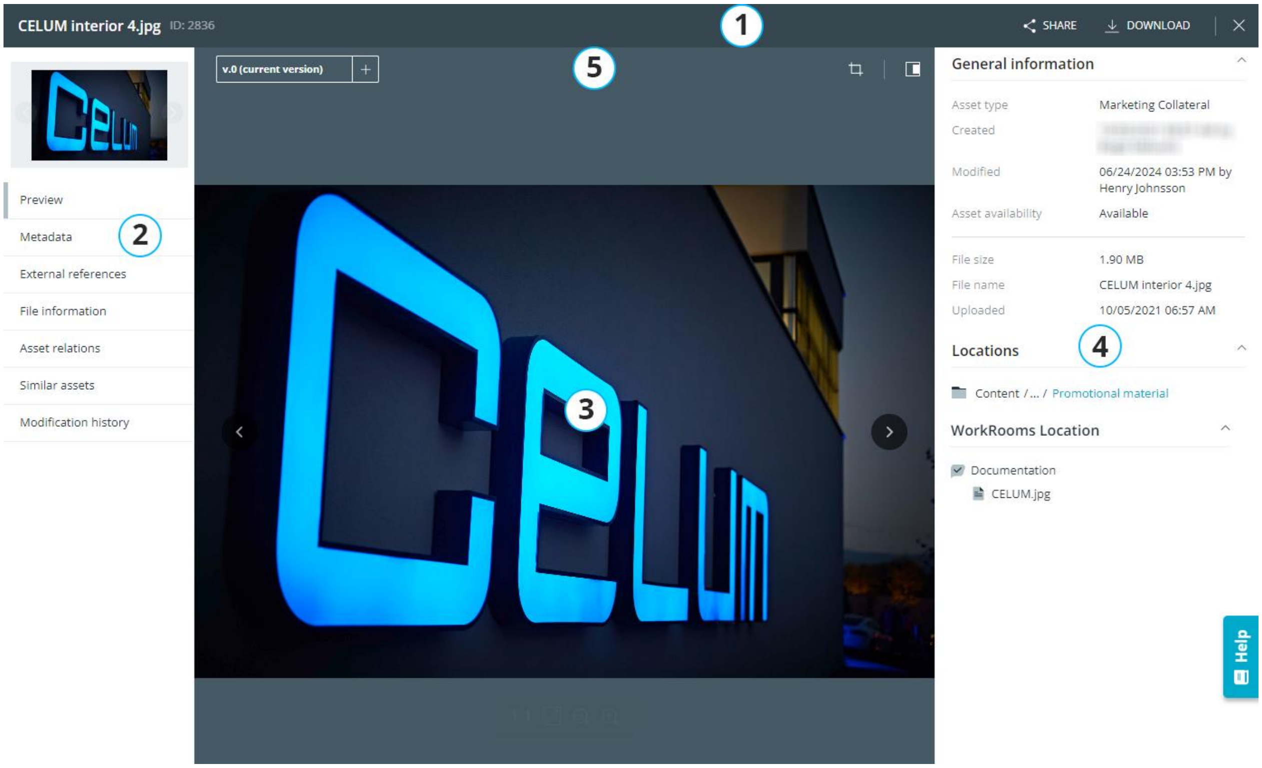
- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

Metadata allows you to structure, categorize, and describe assets within the system. You can view all metadata for a selected asset or in the **detail view**:

- Either double-click an asset in the asset list or lightbox,
- or open the detail view with the "Open detail view" action button in the context menu, action area or magic menu:
  

Layout and information in the detail view

The detail view is separated into the following areas and toolbars:



1. **Header bar**: In this toolbar, you can see the selected asset's name and ID on the left side and buttons to **share** and **download** the asset on the right side. Additionally, you can close the detail view with the ✕ button.
2. **Navigation bar**: On the left side, you can see a small preview and choose different detail view tabs to view different types of metadata about the asset. By default, the "Preview" tab is active. See the section "**The detail view tabs**" for more information.

Switching between assets in the current view

In the small preview, you can switch between back and forth between the assets in the current view (e.g. the current collection, the lightbox, or the current search results). Simply use either the previous-/next-buttons on the small preview or the left/right arrow keys on your keyboard.

3. **Content area**: In the middle area, you can see the content of the active detail view tab.
By default, the preview area with a large asset preview and preview controls is shown. See **Preview assets** for more information.
The content area shows different information about the asset, depending on the

active tab. For example, in the tab "Metadata", it contains all the asset's information fields.

4. **Sidebar**: Depending on the active tab, the sidebar contains different information:
   - If the preview is displayed, the sidebar shows the "Information" tab with the basic information (as it is also displayed in the asset list).
   - If metadata is displayed, the sidebar shows a mid-sized preview image.
5. **Content bar**: The content bar allows you to show or hide the sidebar. If you are viewing metadata in the content area, then the content bar additionally allows you to search for specific metadata, **choose the language** in which you want to view the metadata, and **edit metadata**.

The detail view tabs

- **Preview**: This tab shows a large preview of the asset, along with the preview controls which allow you to manipulate the preview. See **Preview assets** for more information. If the asset has multiple binary versions, you can **manage the versions** in this tab. On the large previous, you can also go back and forth between the assets in the current view.
- **Metadata**: This tab shows all information fields and their values for the asset in the content area. The fields are structured in collapsible information categories. If there are localized fields available, you can **display their values in different languages**. Additionally, you can see a smaller preview of the asset in the sidebar, which you can expand or collapse with the button in the content bar. This smaller preview also includes the preview controls.

You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting. Once you enter edit mode, you will see all fields.

You can find more information about this setting in the "**Show or hide empty metadata fields**" section below.

- **Asset relations**: This tab shows you all related assets for the selected asset. See **View an Asset's related objects** for a breakdown of this tab.
- **File information**: This tab shows all asset properties which describe the technical details of the binary file behind the asset.
- **External references**: This tab shows all external references (publically available URLs) for the asset. It provides a good overview if the same asset is published on media platforms, used on a website via a CMS or globally available via CDN. You can

directly open the external reference via a link in the tab. See **View external references** for more information.

- **Similar Assets**: This tab shows a list of the currently selected asset's **similar assets** which were found by the Similarity Search feature. This tab is only available if the Similarity Search is licensed for your server.
- **Modification history**: This tab shows you an overview of all changes to metadata or parent collections that were made on the current asset. See **View an object's modification history** for more details.

Switch metadata language

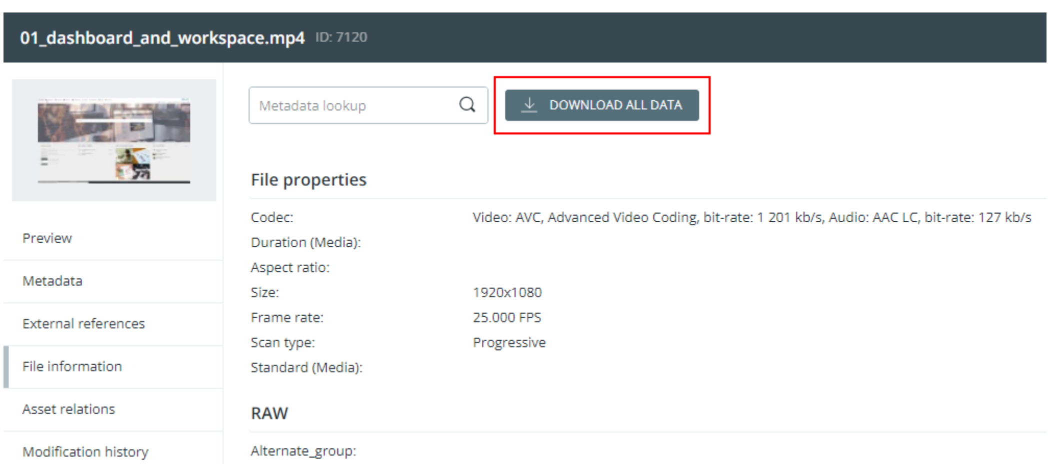
Both the sidebar and the detail view allow you to choose the display languages for displayed metadata in the "Metadata" tab.

- In the **sidebar**, you can switch between languages via a drop-down menu below the sidebar tab headers. You can only choose one language at a time.
- In the **detail view**, you can choose multiple languages via a drop-down menu in the content bar. If the asset's metadata contains localized fields, the field values will be displayed simultaneously in all languages which you chose in the menu. The application's default language (e.g. English) is always selected.

Download file information as JSON

In the **"File information" tab**, you see all file properties and raw information that the current asset's binary file contains.

If there is a lot of binary information, the data may exceed the available space in the detail view. Therefore, you can download all data contained in the binary file in JSON format with the "**Download all data**" button:



The data is downloaded in a TXT file and formatted in JSON.

Show or hide empty metadata fields

In the detail view's "Metadata" tab, you can decide if you want to show all metadata fields (including empty ones) or only those metadata fields that have a value. The toggle button in the content bar has two states:

- " **Show all fields**" : Click on the button in this state to show all metadata fields, regardless of their values. This means that currently, only fields with values are shown.
- " **Show only fields with values**": Click on the button in this state to show only metadata fields with values. This means that currently, all fields are shown, regardless of their values.

Fields of type "checkbox" will always be shown, even if they are not checked.

The setting's state is always the same in both asset and collection detail view. If you change the setting in asset detail view, it will also change in collection detail view, and vice versa.

This setting has an effect on the following places where metadata is shown:

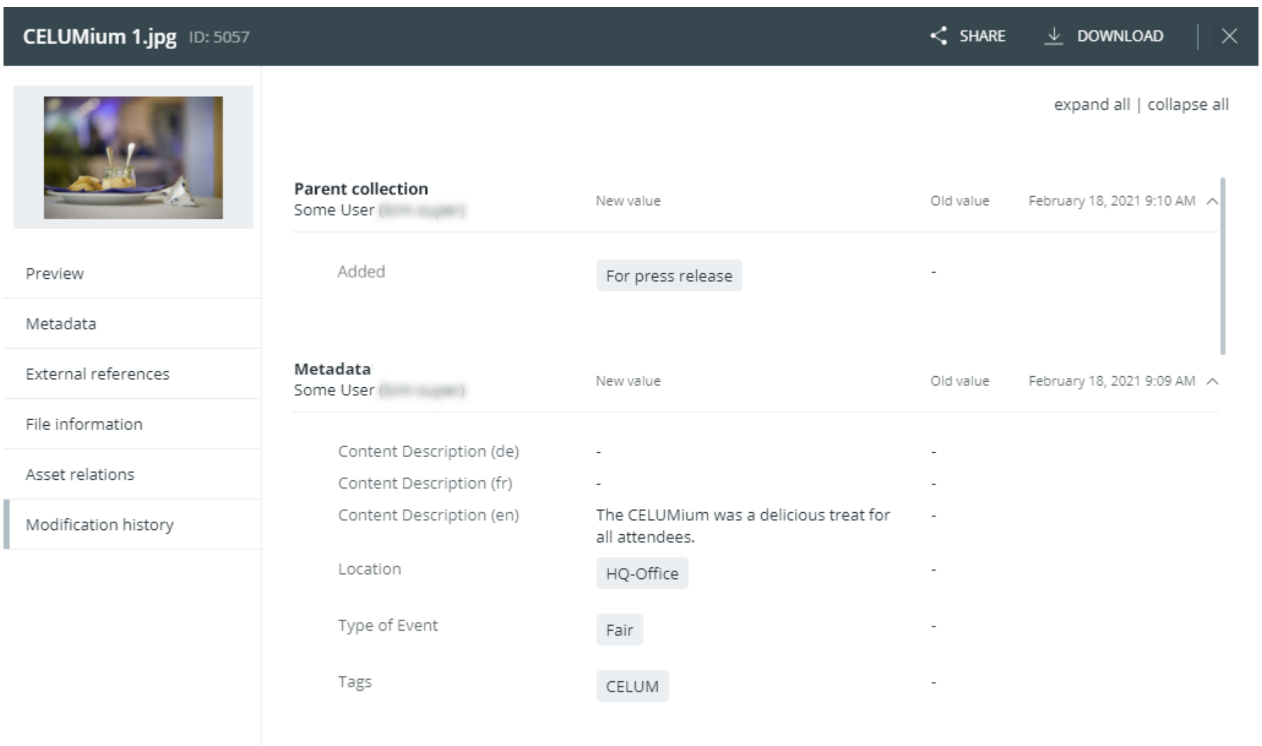
- The "Metadata" tab in the sidebar for a particular asset or collection in Explore View and Advanced Search.
- The "Metadata" tab in the detail view of a particular asset or collection.
- The selection overview in the metadata wizard, where you view multiple assets' metadata before editing.

View an asset's modification history

As a user with at least a minimum permission level (combined in a specific **user type**), you can get an overview of all changes that are made on assets or collections in CELUM Content.

> The minimum user type at which users can see the modification history depends on your CELUM Content server's configuration.

If you have sufficient minimum permission level, you'll find the modification history for a selected asset in its **detail view**, in the "Modification history" tab:



The changes are grouped by their category and date, with the following categories in use:

- **Parent collection**: Groups actions that change the asset's parent collection, like linking, moving, or removing the asset.
- **General Information**: Groups changes for the general asset properties inside the "General Information" information category.
- **Metadata**: Groups field value changes for information fields.
- **Version**: Groups changes to asset versions, like adding or deleting a version, or changing the current version.

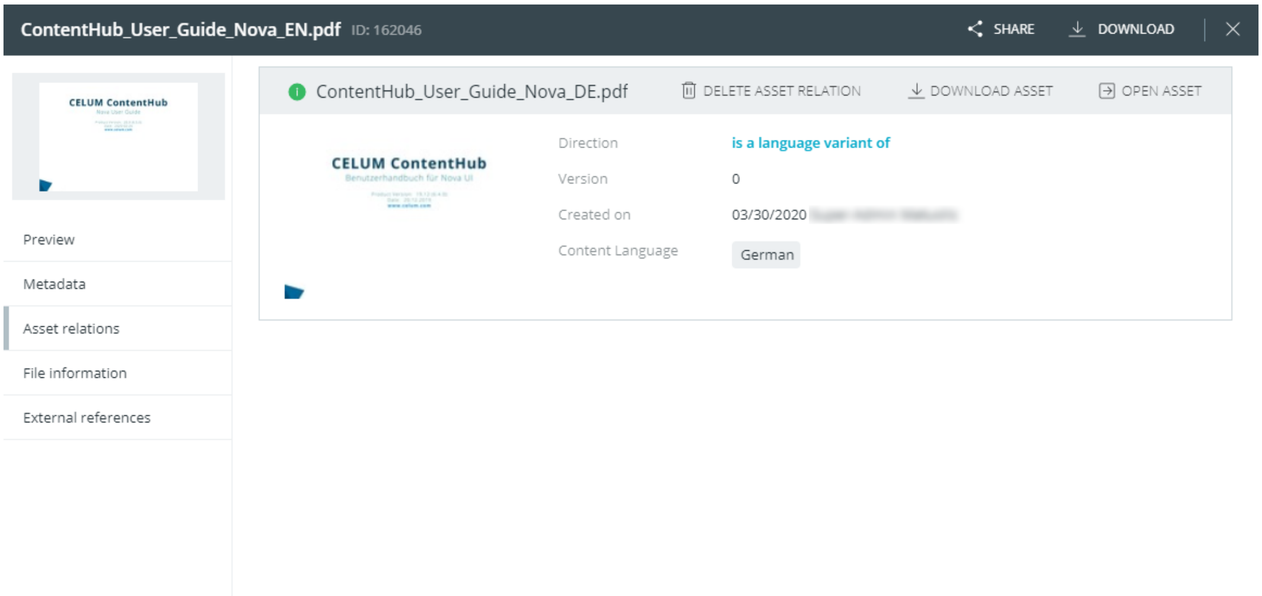
- **Added to workrooms**: This category will be shown if an asset also exists as an asset in CELUM Work.

> If a user who executed actions on the object in CELUM Work deletes their CELUM Work account, their name and e-mail address won't be shown anymore.

From left to right, the action or changed field, the new value after the change and the old value before the change are displayed for each category.

View related assets

Asset relations are used to link similar or otherwise related assets to one another. You can view a selected asset's relations in the "Asset Relation" detail view tab:



Each relation is shown in a collapsible panel. The panel header shows the **related asset's name**, actions for the relation and an icon for the **relation status**:

- **Established relation**: These are normal, working asset relations between two existing assets. Relations are always established between specific asset version and are marked with the icon.
- **Outdated relation:** Relations are always established with specific asset versions. If somebody uploads a new version for a related asset, then the relation to the previous version becomes **outdated**. Outdated versions are marked with the icon.
- **Broken relation:** If a related asset is deleted, the relation to it becomes **broken**. Broken relations are marked with the icon and the deleted asset's preview and name are removed from the detail view tab.

Inside the panel, information about each relation is shown. This includes the **creation date** for the relation and **who created it**, which **version of the related asset** the relation was established with, the **direction of the relation** and the **information fields** for the relation.

The above screenshot shows existing relations for the currently selected asset "ContentHub_User_Guide_Nova_EN.pdf". The relations in this case read as follows:

- ContentHub_User_Guide_Nova_DE.pdf is a language variant of ContentHub_User_Guide_Nova_EN.pdf with the content language "German".

To learn how to establish such relations yourself, see **Manage asset relations**.

Download related objects

Click the "Download asset" button in the relation panel's header. The related asset gets directly downloaded in its original format.

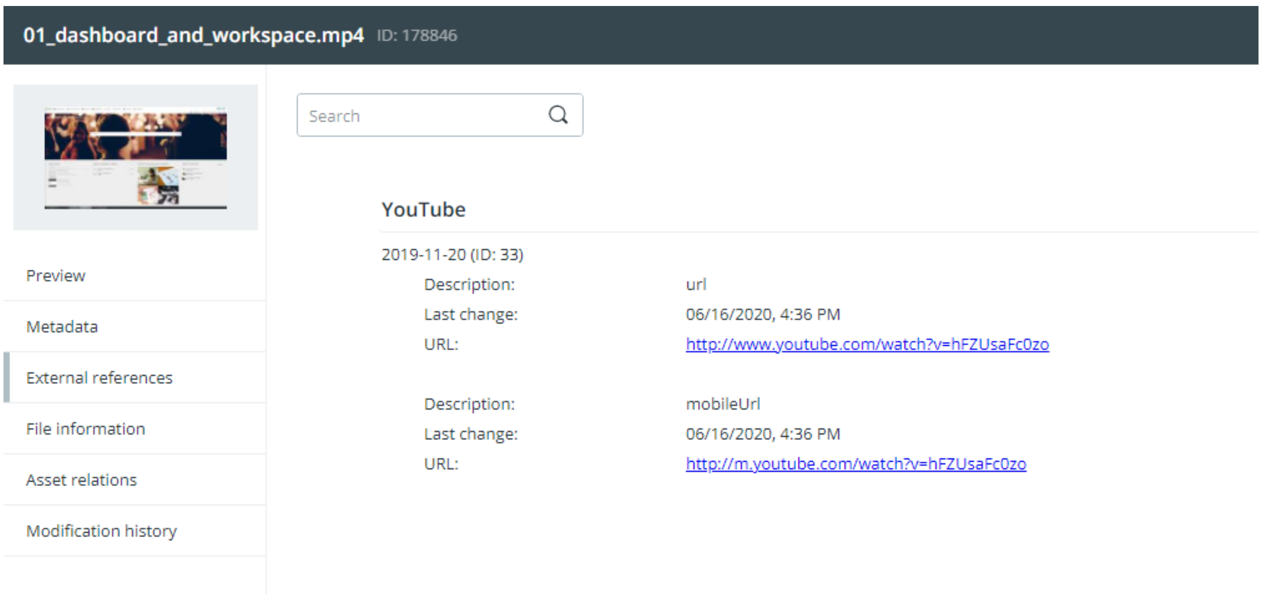
Go to a related asset

Click the "Open asset" button in the relation panel's header. This will open the related asset's detail view, where you can view the preview, asset information and versions for the related asset, download the related asset and see its own asset relations.

View external references

The detail view tab "External references" shows all URLs under which the current asset is reachable publicly. These URLs are generated if an asset is, for example, distributed via CDN, published on a website directly from CELUM Content. Certain product extensions like the Exporter also generate a URL reference.

For every public reference, the tab shows a description, the last change date as well as the clickable URL itself:



With the search box on top of the tab, you can look up specific references.

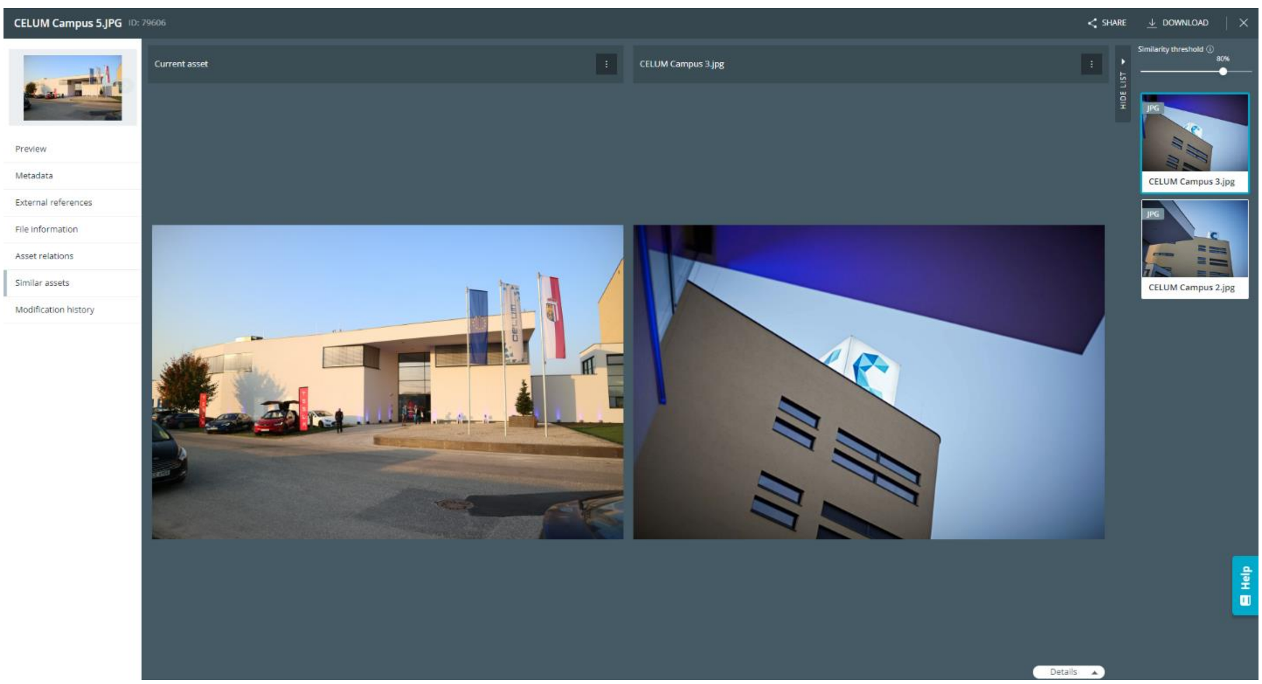
View similar assets

Thanks to the Similarity Search feature, CELUM Content is able to detect **similar image assets** which either have similar colours or similar patterns. You can see all similar assets in the "Similar assets" detail view tab for image assets.

Additional subscription required

To use the Similarity Search, a subscription for it is necessary for your organisation in CELUM Cloud Account. Please contact the CELUM Cloud organisation's manager to take care of the subscription process.

On the left side of the tab, you see the currently selected asset. On the right side, a list with similar assets is shown. The most similar assets are shown at the top of the list, the least similar assets at the bottom. The first asset in the list is pre-selected:



You can collapse the list of similar assets with the button "Hide list" to get some more space.

You can find general information on how to use the compare view in **Compare assets**.

Compare similar assets

Simply click an asset in the list on the right side of the window to compare it with the currently selected asset.

At the bottom, you can also expand the compared assets' metadata and **compare them**.

Jump to a similar asset's detail view

1. Open the context menu  for the similar asset.
2. Click "Open detail view for similar asset" in the context menu.
3. The similar asset's detail view opens in the same tab.

To get back to the previous asset, simply click your browser's "Back" button.

Compare metadata for similar assets

In order to compare the assets' metadata, expand the metadata via the "Details" button in the lower right corner of the preview areas:

The metadata expand and you can compare them.

On top of the metadata panel, you can look up specific metadata fields and change the language that values should be displayed in:

The metadata refresh depending on your search terms and the chosen language.

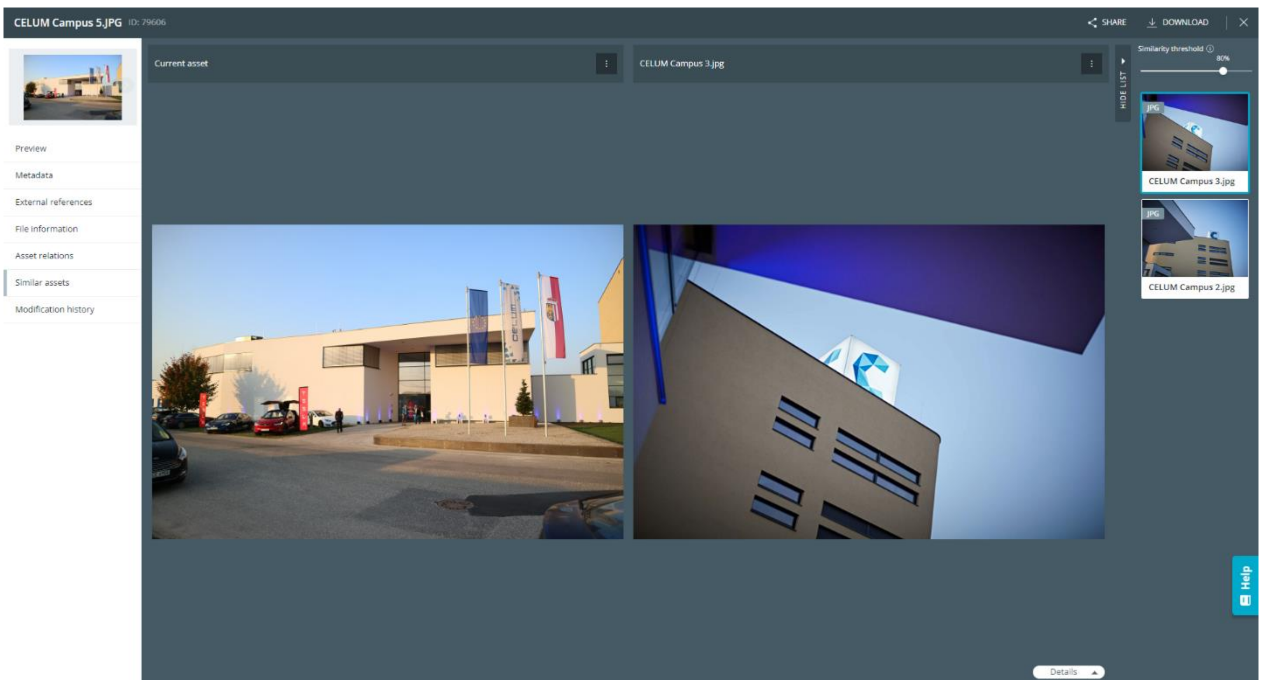
Manage similar assets

Thanks to the Similarity Search feature, CELUM Content is able to detect **similar image assets** which either have similar colours or similar patterns. You can see all similar assets in the "Similar assets" detail view tab for image assets.

Additional subscription required

To use the Similarity Search, a subscription for it is necessary for your organisation in CELUM Cloud Account. Please contact the CELUM Cloud organisation's manager to take care of the subscription process.

On the left side of the tab, you see the currently selected asset. On the right side, a list with similar assets is shown. The most similar assets are shown at the top of the list, the least similar assets at the bottom. The first asset in the list is pre-selected:

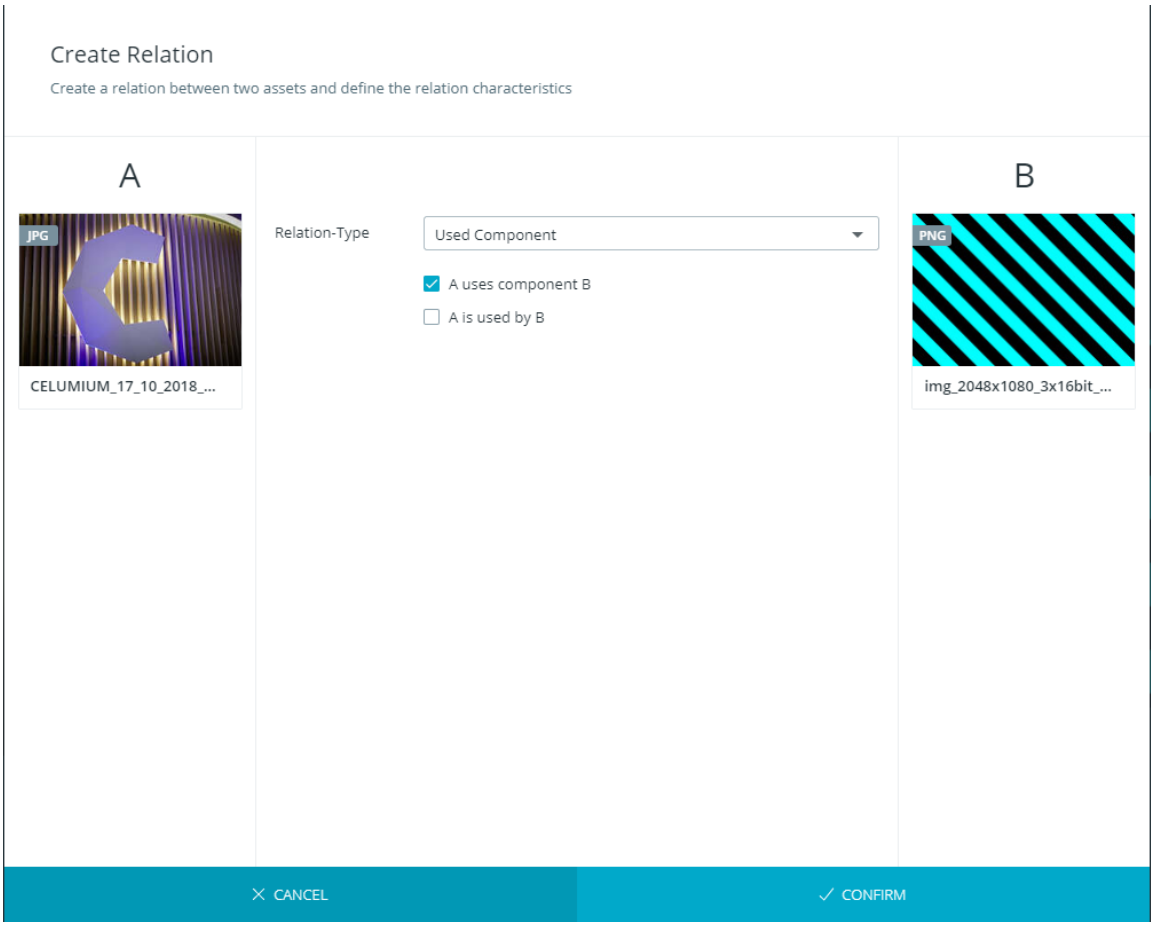


You can collapse the list of similar assets with the button "Hide list" to get some more space.

You have multiple possibilities to deal with similar assets.

Create a relation between similar assets

1. Open the context menu ⋮ for either the currently selected asset or the similar asset.
2. Click "Create relation with the current asset" (if you opened the context menu for the similar asset) or "Create relation with the similar asset" (if you opened the context menu for the current asset). A new dialog for creating relations opens:



The asset for which you executed the action is always displayed on the left side of the dialog.

3. Choose a type of relation and a direction for the relation.

The available relation types depend on your CELUM Content configuration and are determined by a technical administrator.

4. Click "Confirm" to create the relation.

Link a similar asset to a different collection

In order to better organize your content, you can link a found similar asset to additional parent collections.

1. Open the context menu for the similar asset.
2. Click "Link" in the context menu. A collection picker opens.
3. In the collection picker, pick one or multiple collections that the similar asset should be linked to.
4. Click "Link" to confirm your choice.
5. The similar asset is now located in all chosen parent collections.

Trigger the similarity search for a similar asset

Sometimes you may want to find out if a particular similar asset that was found for the currently selected asset has other, still unknown similar assets:

1. Open the context menu for the similar asset.
2. Click "Similar assets" in the context menu.
3. The Similarity Search now looks for similar assets again, and shows them in the detail view. But this time, the previous similar asset is the current asset (shown on the left side) and its own similar assets are shown on the right side.

Adjust the similarity threshold

The similarity threshold defines how much similarity the current asset and the found similar assets must at least have. The higher the percentage-value of the threshold, the more similar the found assets must be to the current asset, and the fewer similar assets are found. For example, 80 % means only assets that share at least 80 % similarity with the current asset will be shown.

To increase or decrease the similarity threshold, simply move the slider above the list of similar assets.


Similarity threshold
80%
JPG
CELUM Campus 3.jpg
JPG
CELUM Campus 2.jpg

Preview assets

The simplest way to preview assets is in the **sidebar**, where you see a still image for selected assets. Open the sidebar via the icon in the content bar.

You can also open the "Preview" **detail view** tab in order to see a large interactive preview, where you can use different preview controls to **manipulate the preview**. The detail view also allows you to play video or audio assets and flip through multi-page document assets.

Manipulate the preview

In the preview area in the detail view, a small overlay, the **preview controls**, allows you to manipulate and control the preview. Depending on the file type, different controls are available.

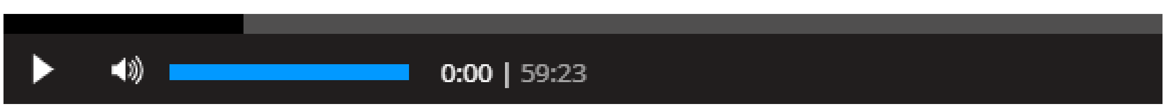
In the **compare view**, the additional icon allows you to unlink or link the preview controls. If the preview controls are linked, only one preview control overlay is available for both previews in the compare view. This allows you, for example, to zoom into the same position on both preview images. If the preview controls are unlinked, each side of the compare view has its own preview control overlay.

There are some restrictions for the preview controls in the compare view:

- If you are comparing two multi-page documents, you can only flip through the pages of the currently selected version (on the left side of the compare view). You cannot change the pages on the right side.
- For video and audio assets, you can only link and unlink the volume control. The play/pause button and timeline always apply to both previews.

Preview controls for audio files

For audio assets, you can use the typical audio controls (play button and volume control). To jump to a specific time in the audio asset, click on the audio playback bar:



Preview controls for documents

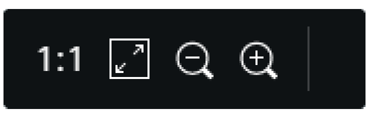
From left to right:

- Flip through the document's pages. Arrow up means flip backward, arrow down means flip forward.

You can only flip through pages if previews were already created for them. If the buttons are disabled, wait a few minutes before trying again.

- Display of current page and total page amount
- Show page preview in original size
- Enlarge page image to fill available space
- Manually zoom in and out
- Enable text selection to select text inside the document preview. There are two states to this button:
    - enables the text selection if you click it. You can then select and copy text in the document preview.
    - disables the text selection if you click. You can then no longer select and copy text in the document preview.

Preview controls for images

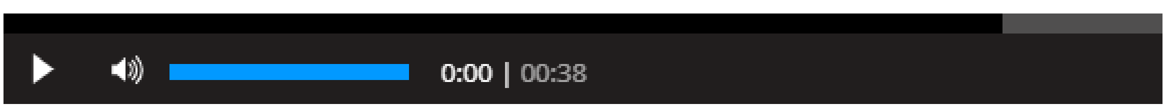


From left to right:

- Show image in original size
- Enlarge image to fill available space
- Manually zoom in and out

Preview controls for video files

For video files, you can use the typical video controls (play button and volume control). To jump to a specific time in the video, click on the video playback bar:



Preview controls for 3D models

For 3D models with interactive preview, the preview controls open in the lower right corner of the preview area:

The interactive 3D preview is only available if the "3D viewer" feature is enabled on your CELUM Content server. If it's not activated, no interactive preview is shown.

From left to right:

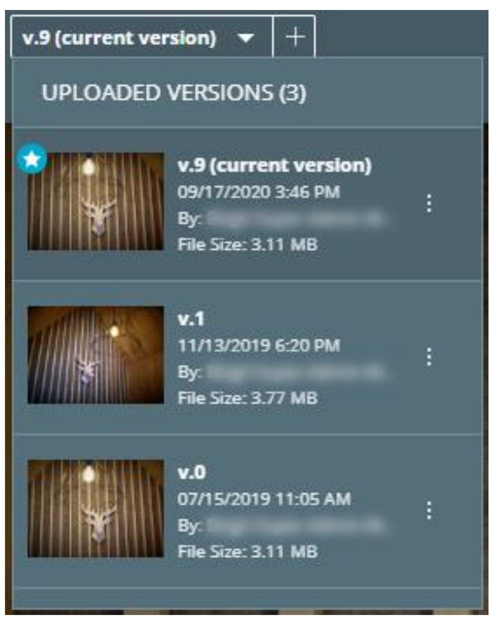
- *Settings*: In the settings, you can, for example, change the viewpoint of the preview.
- *Model inspector*: In the model inspector, you can fine-tune different aspects of the model display, like color, materials or geometry. The model inspector opens in a dedicated overlay on the left side of the preview area.
- *View in VR*: Opens the model in a dedicated VR environment.
- *Fullscreen*: Opens the model in a new browser window in full size.

Additionally, you can rotate the model in every direction by dragging your mouse over the preview area.

View previous asset versions

You can view basic information about and the preview of all previous versions of an asset in the "Preview" tab of the detail view. If multiple versions for the current asset are available, the content bar contains a drop-down menu. The following information about each version is available:

- Version number
- Upload date
- Uploading user
- File size

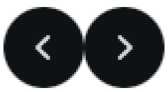


Click one of the versions in the version overview to see its preview in the large preview area.

You can **compare two versions** directly in the "Preview" tab. As a contributor user, you can also **manage versions** for the asset either directly in the detail view.

Go to next or previous asset

Small arrow icons on the left and/or right side of the asset preview allow you to jump to the next or previous asset in the asset list:



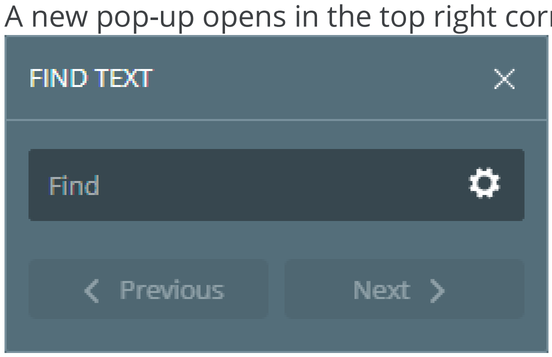
You can either use the cursor keys on your keyboard to navigate through the folder content, or click the arrow buttons.

When you reach the first asset in the list, the "Previous" button disappears. When you reach the last asset in the list, the "Next" button disappears.

Search inside a document

If you're viewing the detail view of an asset with type "document" (e.g., a .docx, .rtf, .txt, or .pdf document, among others), you can search for text directly inside the document on the "Preview" tab:

1. Press Ctrl + F on your keyboard.
2. A new pop-up opens in the top right corner of the preview area:



3. Type a search term into the text field and the text will be automatically highlighted inside your asset's preview.

Configuration options

Click the configuration icon to fine-tune your search. You can choose the following options:

- **Highlight all**: Highlights all occurrences of the search term at once.

- **Whole words only**: Finds only whole words, no sub-strings or partial words.
- **Case-sensitive**: Finds words only if capitalization matches.

Recreate asset previews

You can only use this function as a **power user with super-administrator permissions**.

In the Explore View and Advanced Search, you can manually trigger the recreation of assets whose preview generation failed during upload.

To identify assets with failed previews easily, you can use the "General" filter widget's "Conversion error" criteria.

1. Select one or multiple assets (up to 200 assets at once).
2. Open the context menu or magic menu for the assets.
3. Click the "Recreate previews" action.
4. The previews will be recreated if possible.

FAQ

I uploaded a 3D file, but the 3D preview is not shown

If you uploaded a 3D file but the interactive 3D preview is not displayed, one of the following reasons may apply:

1. The 3D feature is not enabled on your CELUM Content server. In this case, please contact an administrator who can request the feature from CELUM.
2. You organization has reached the defined limit of the 3D upload conversions. In this case, please contact an administrator who can request a license upgrade.
3. The file format of the uploaded 3D file is not supported by CELUM Content. In this case, try converting it to a different format.

A list of all formats that are recognized as 3D models is available in the **Customer Knowledge Base**.

Compare assets

Sometimes you may want to compare two assets in order to see differences and find potential for improvements. For this purpose, you can open the **compare view** for the assets.

The compare view opens in the preview area of the detail view and consists of two preview images side by side, which you can **manipulate** with either a single or two separate **preview controls**. The preview controls are the same as in the normal preview.

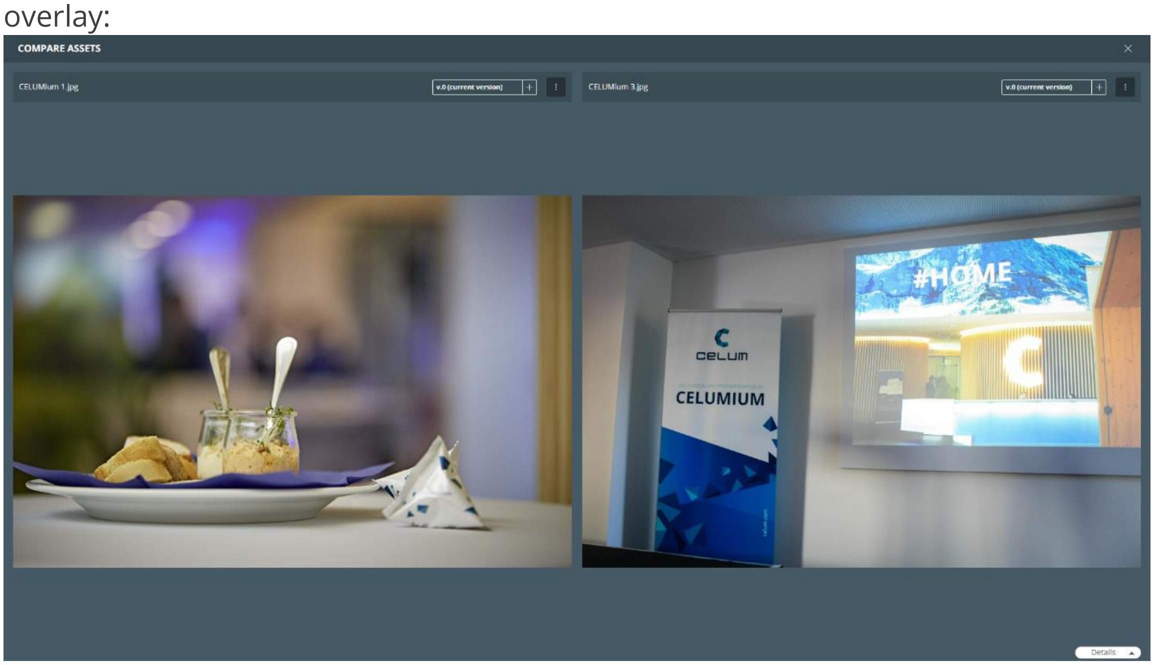
Functionality notes

CELUM Content lets you freely decide which two assets you want to compare with each other. The compare view will try to accommodate you as best as possible but naturally, some comparisons (e.g. comparing two documents) make more sense than others (e.g. comparing a video and an image). If the binary files of the two assets or versions are too different, some functions in the preview controls may not be available.

Compare assets in Explore View

Use the "Compare" function on any 2 assets in the Explore View:

1. Select 2 assets in the asset list or lightbox.
2. Open the context menu or magic menu for the selected assets.
3. Click the "Compare" action in the menu. The standard compare view opens in a new overlay:



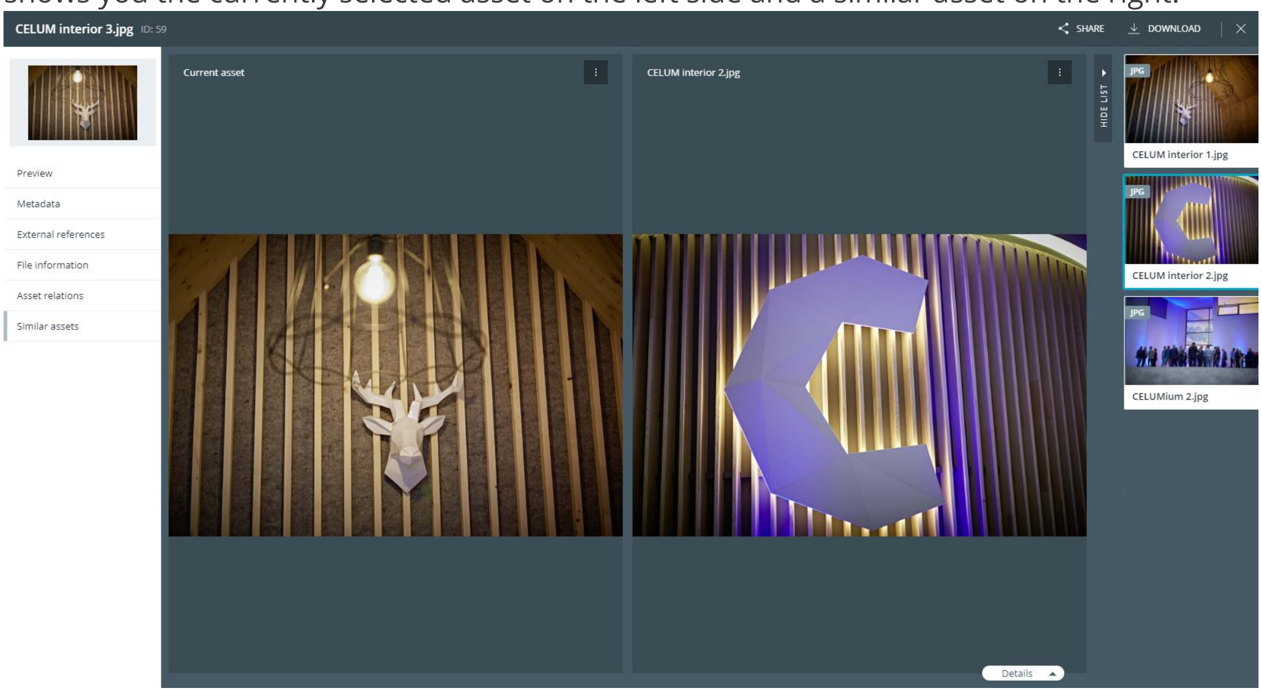
4. For each asset, you can **manage its versions**, **link it to other collections**, **create a relation** to the other compared asset, or **open its detail view**.
5. Additionally, you can **compare the assets' metadata**.

Compare similar assets

Additional subscription required

The "Similar assets" tab is only available your organisation has a subscription for the **Similarity Search** in CELUM Cloud Account. Please contact the CELUM Cloud organisation's manager to take care of the subscription process.

In the detail view's "Similar Assets" tab, you can compare the currently selected asset to similar assets in the system. In the central part of the detail view, a standard compare view shows you the currently selected asset on the left side and a similar asset on the right:



Click one of the similar assets in the list on the right edge of the browser window to display it on the right side of the compare view.

Jump to a compared asset's detail view

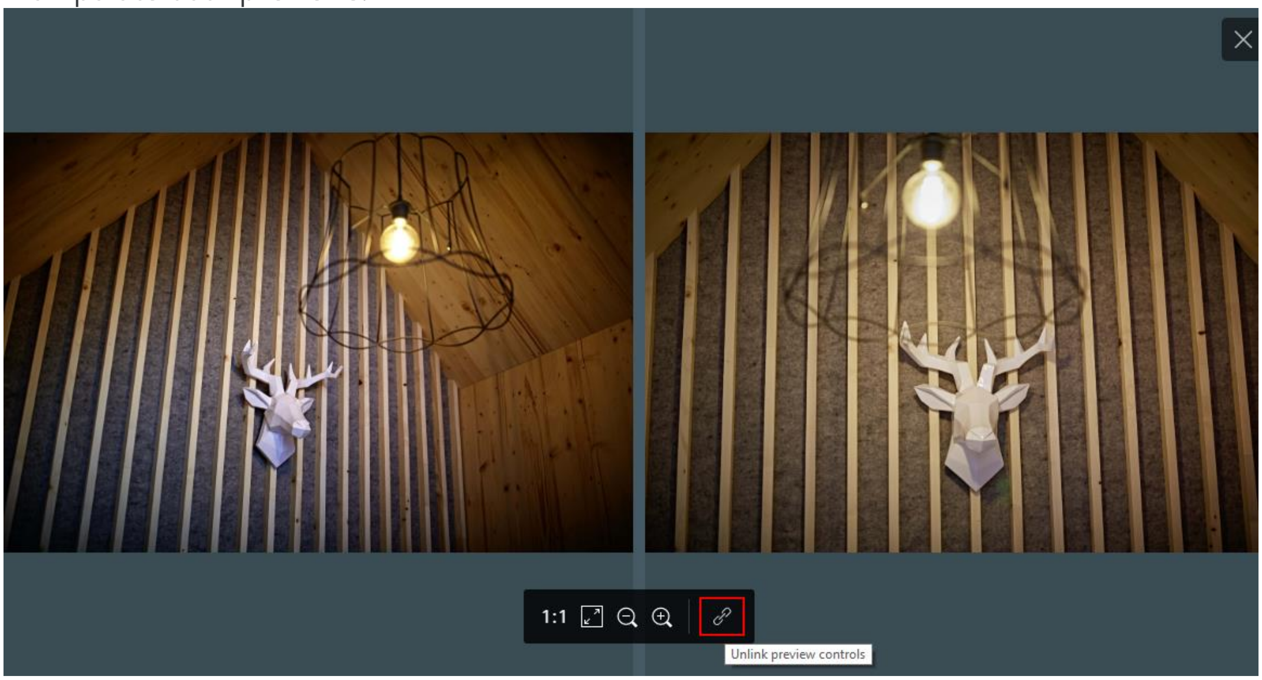
1. Open the context menu  for one of the compared asset.
2. Click "Open detail view" in the context menu.

3. The asset's detail view opens in the same tab.

To get back to the compare view, simply click your browser's "Back" button.

Unlink the preview controls

By default, you **control both preview images** with a single preview control overlay. However, you can unlink the preview controls with the icon so you can independently manipulate both previews:



There are some restrictions for the preview controls in the compare view:

- If you are comparing two multi-page documents, you can only flip through the pages of the currently selected version (on the left side of the compare view). You cannot change the pages on the right side.
- For video and audio assets, you can only link and unlink the volume control. The play/pause button and timeline always apply to both previews.

To link the preview controls again, click the icon on the right side's preview control overlay again.

Compare asset metadata

In order to compare the assets' metadata, expand the metadata via the "Details" button in the lower right corner of the preview areas:

The metadata expand and you can compare them.

On top of the metadata panel, you can look up specific metadata fields and change the language that values should be displayed in:

The metadata refresh depending on your search terms and the chosen language.

Close the compare view

To close the compare view, click the ✕ icon in the top right corner of the preview area.

FAQ and troubleshooting

The preview controls in the compare view do not match or some functions don't work

CELUM Content lets you freely decide which two assets you want to compare with each other. The compare view will try to accommodate you as best as possible but naturally, some comparisons (e.g. comparing two documents) make more sense than others (e.g. comparing a video and an image). If the binary files of the two assets or versions are too different, some functions in the preview controls may not be available.

If the preview controls for the two sides of the compare view do not match, the most likely explanation is that the two compared assets or versions have very different types.

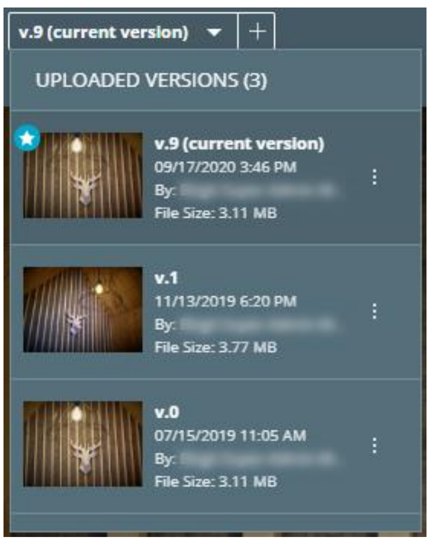
Compare asset versions

As assets can have multiple binary file versions, you may want to compare these versions to see what has changed. This is easily possibly in the detail view:

Functionality notes

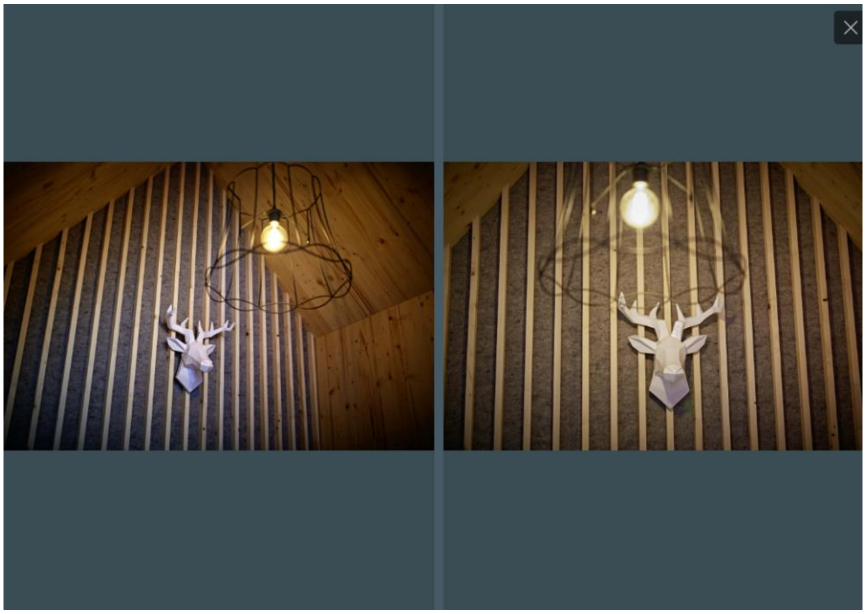
CELUM Content lets you freely decide which two assets you want to compare with each other. The compare view will try to accommodate you as best as possible but naturally, some comparisons (e.g. comparing two documents) make more sense than others (e.g. comparing a video and an image). If the binary files of the two assets or versions are too different, some functions in the preview controls may not be available.

1. In the detail view's "Preview" tab, open the version history for an asset:



2. Select an asset (via single click) so it has a darker background.
3. Open the context menu ⋮ on a version which you want to compare to the selected version.
4. Click the action " Compare" in the context menu.

5. In the preview area, you can now see the two versions' previews in the compare view:



- The left side contains the selected version's preview (Version #1 in the above example).
- The right side contains the compared version's preview (Version #0 in the above example).

The version history in the "Preview" detail view tab also offers other ways to **manage asset versions**.

Change a video's preview image

Each asset that you upload to CELUM Content has a preview image. For video assets, you can change the preview image to a snapshot of your choice in the detail view's **"Preview" tab**.

1. Open the detail view for a video asset.
2. Switch to the "Preview" tab.
3. Start playing your video or jump to the desired position, then click "Pause".
4. Click the "Take a snapshot as preview image " button  in the content bar.
5. The preview image for the asset gets regenerated.

The new preview image will be shown in the following places:

- The small preview above the navigation tabs in the detail view.
- The preview in the Explore View and Advanced Search.

Set or change the asset type

Metadata for assets are always bound to a specific **asset type**, which means in order to edit an asset's metadata, you always need to assign an asset type to it first.

You have two different ways to assign or change the asset type:

- In the **detail view** for a single selected asset
- Via the direct **"Edit Metadata" action** for both single or multiple selected assets

Set the asset type during upload

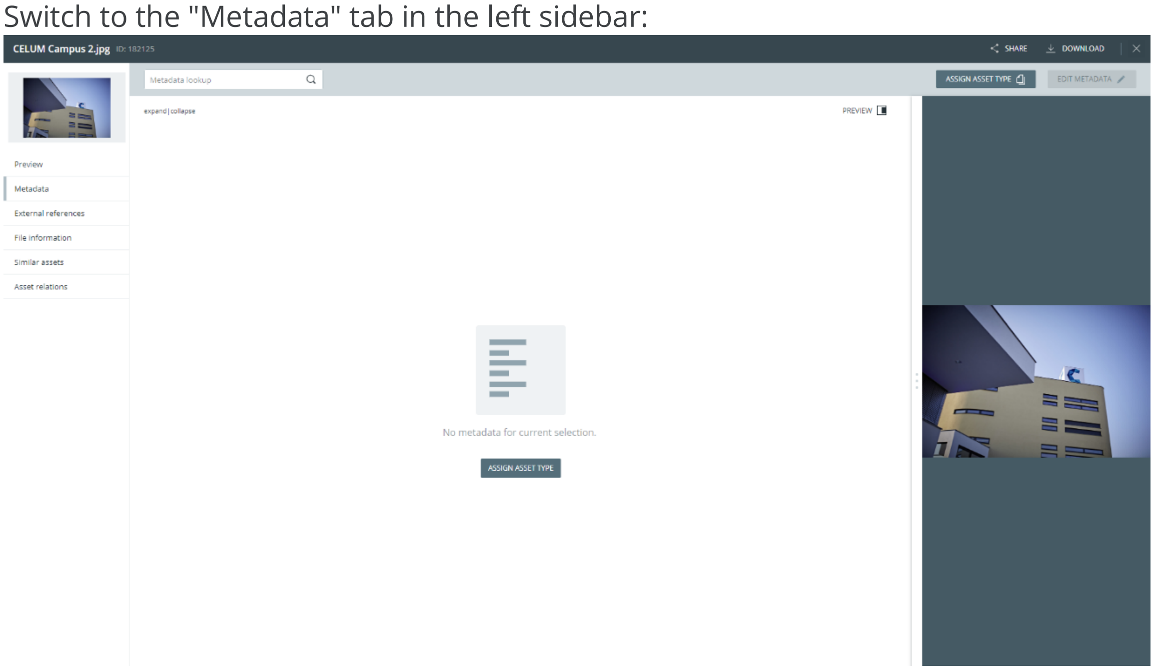
If you're uploading the asset(s) to a **strict collection**, you must set the asset type during the upload process.

In the **upload wizard**, you can set the asset type for one or multiple uploaded assets. See the topic **Create assets** for more information.

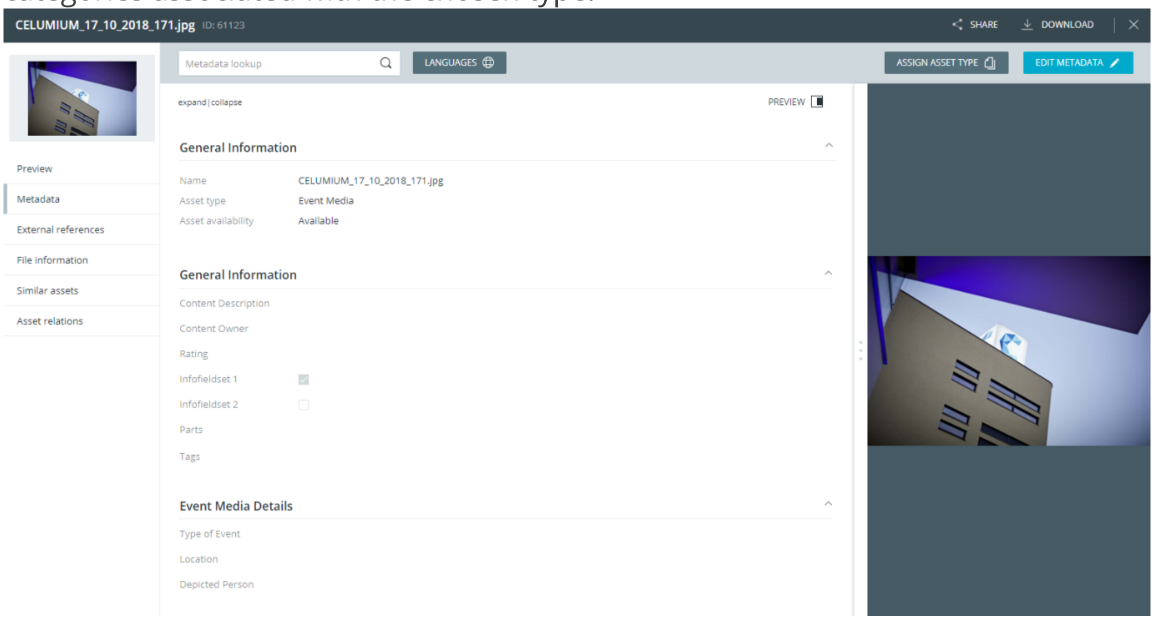
Set or change the asset type in the detail view

In the detail view, you can only set or change the asset type of a **single asset**.

1. Open the detail view for an asset (by default on the "Preview" tab).
2. Switch to the "Metadata" tab in the left sidebar:



3. Click the "Assign Asset Type" button in the detail view's content area or header bar. A new dialog opens.
4. Choose one of the existing asset types.
5. Click "Assign Asset Type".
6. The content area in "read" mode now shows the information fields and information categories associated with the chosen type:



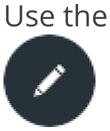
Set or change the asset type via direct action

Prerequisites

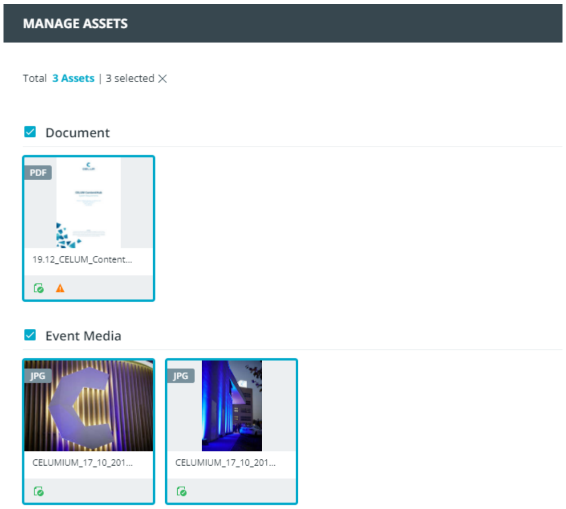
Your asset selection must meet one of the following conditions so you can set or change the asset type with the direct action:

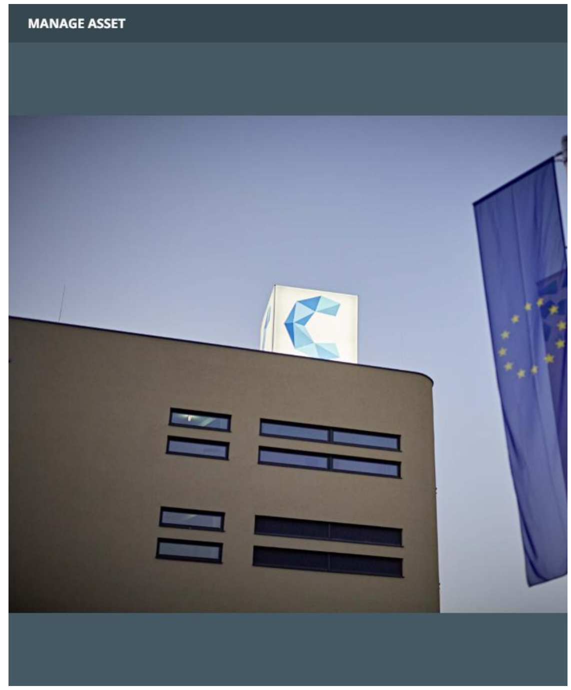
- The collection in which all selected assets are located must have **tolerant metadata validation**.
- A single asset must not have an asset type yet.
  You can only set the initial type for a single asset with the direct action. If you want to change a single asset's existing type, please do so in the **detail view**.

1. Select one or multiple assets that match the prerequisites.
2. Use the "Edit metadata" action in the action area, magic menu or context menu:



3. The **metadata wizard** opens. The left side of the wizard shows a batch selection view for multiple selected assets, sorted by their asset type, or a large preview for a single asset. The right side shows the metadata area with all metadata that the selected assets have in common (if the assets already have a type):





4. In the batch selection view on the left side of the wizard, you can select specific assets or all assets of a specific asset type. This allows you to change the asset type of only a subset of assets.
5. Click "Assign Asset Type" in the header bar or metadata area. A new dialog opens.
6. Choose one of the existing asset types.
7. Click "Assign".
8. The metadata area now shows the information fields and information categories associated with the chosen type.

Restriction for changing the asset type

You cannot change the asset type for assets inside a **strict** collection, because changing the asset type will likely result in empty required fields. Assets inside strict collections cannot have empty required fields. A collection can be *strict* or *tolerant*, and only tolerant collections accept empty required fields on their assets.

The button for assigning an asset type will be visible in the application, but it will be deactivated if the selected assets are located in a strict collection.

FAQ and troubleshooting

Why can I change the asset type for assets in some collections but not in others?

The most likely explanation is that you cannot change the asset type for assets in **strict** collections. Strict collections do not allow their assets to have invalid information fields (e.g. required fields that are empty). If you change the asset type, there will probably be invalid fields, which prevents you from saving the asset metadata in strict collections.

Can I remove an asset's type?

No, it is not possible to remove/unset an asset type from an asset once it was set for the first time, as this would mean losing all entered information field values irreversibly. You can only **change** the type.

Why is my uploaded assets' type set automatically?

If you only have permission to use one asset type, the type is set automatically during upload.

Edit asset metadata

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

Of these types, you can only edit information fields in CELUM Content, because the other kinds are automatically set during upload. Information fields for assets are always bound to a specific **asset type**, which means in order to edit an asset's metadata, you always need to **set an asset type** for it first.

Information Fields are permission-dependent

On different collections of the same type, you may have different local permissions. This influences which information fields you are allowed to see or edit for each asset.

Edit a single asset's metadata

You have two different ways to edit a single asset's metadata:

- In the **detail view**
- Via the direct **"Edit Metadata" action**

Edit metadata in the detail view

1. Open the detail view for an asset.
2. Switch to the "Metadata" tab in the left sidebar of the detail view.
3. The asset's metadata is displayed in the content area.

You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting. Once you enter edit mode, you will see all fields.

You can find more information about this setting in the "**View all asset information**" article.

4. Click "Edit Metadata" in the content bar. The information fields in the content area become editable.

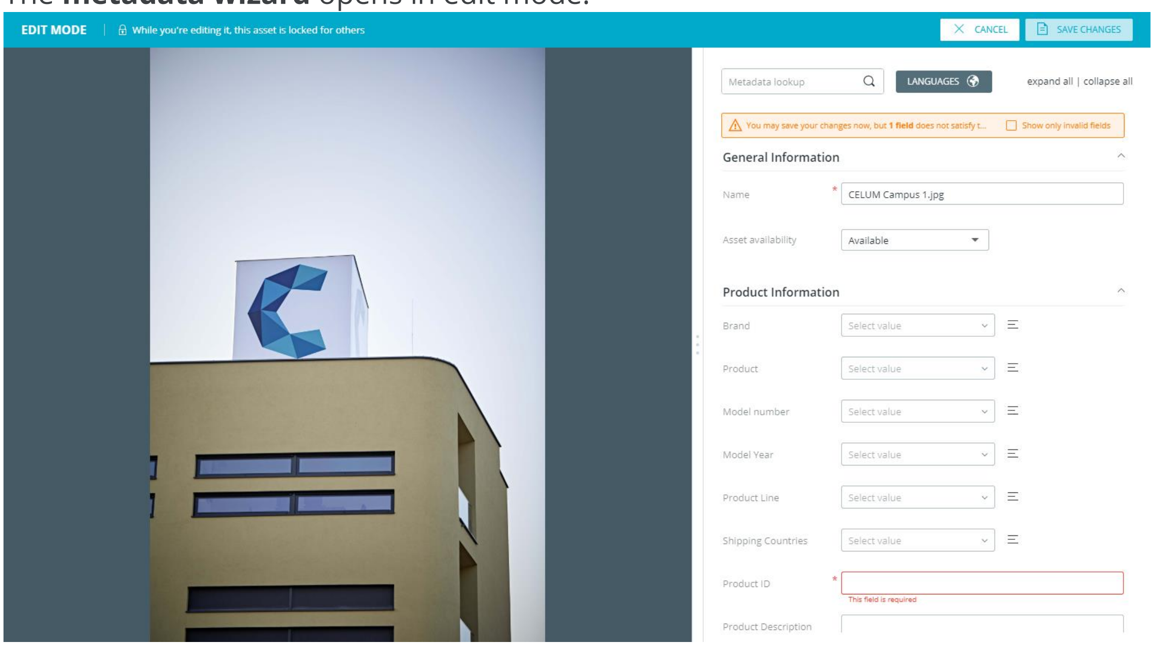
> If no asset type is assigned yet, you cannot edit the metadata. You need to choose an **asset type** first.

5. Edit the field values. If any important editor information is available for a field, a small information icon ⓘ on the right side of the content area indicates this and shows you a tool-tip when you move your mouse over it.
6. Save the changes with the "Save" button in the header bar.

Edit metadata via direct action

1. Select an asset in the asset list or lightbox.
2. Use the "Edit metadata" action in the action area, magic menu or context menu:

3. The **metadata wizard** opens in edit mode:



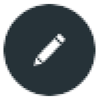
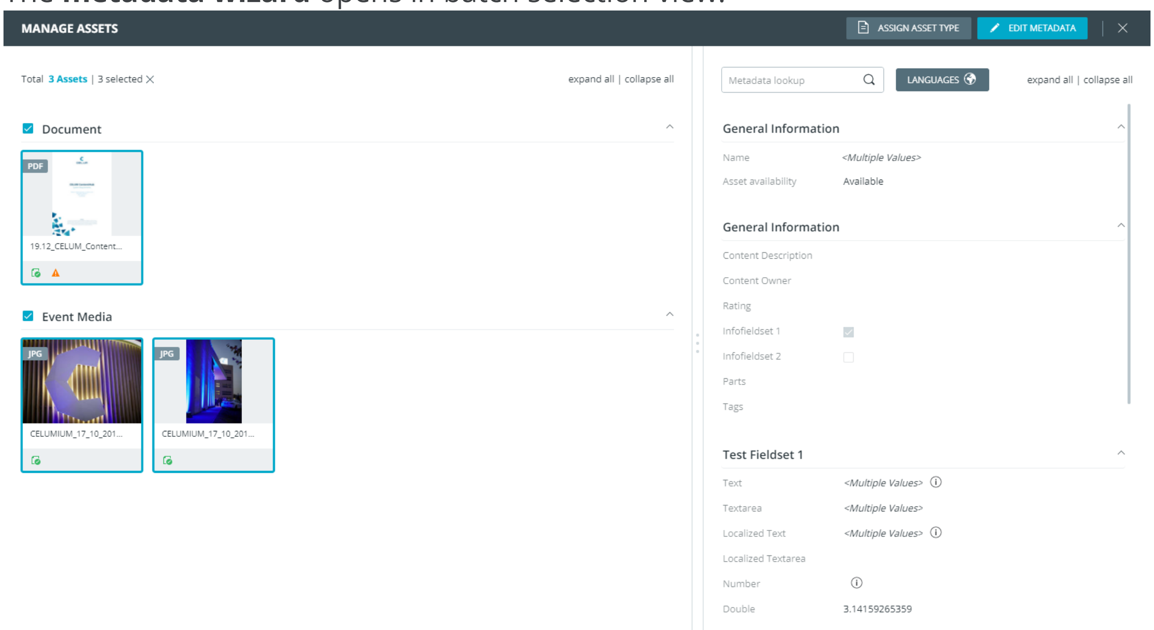
4. Edit the field values.

> If invalid information fields are present, you can filter them with the check box "Show only invalid fields".

5. Click "Save Changes" in the header bar to save your changes.

6. The metadata wizard closes.

Edit multiple assets' metadata

1. Select some assets in the asset list or lightbox.
2. Use the action "Edit metadata" in the action area, magic menu or context menu:

3. The **metadata wizard** opens in batch selection view:


You may not see all available fields in **read mode**, as empty fields may be hidden via the "Show all fields/Show only fields with values" setting.Once you enter edit mode, you will see all fields.

You can find more information about this setting in the "**View all asset information**" article.

4. Optionally select only a subset of assets on the left side. This enables you to further restrict which assets you want to change.
5. Click "Edit Metadata" in the header bar.
6. Edit the field values.

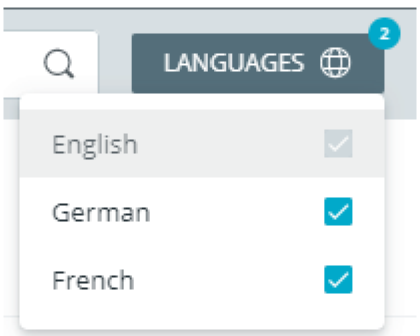
If invalid information fields are present, you can filter them with the check box "Show only invalid fields".

7. Click "Save Changes" in the header bar to save your changes.
8. The metadata wizard switches back to batch selection view.

Add values in multiple languages

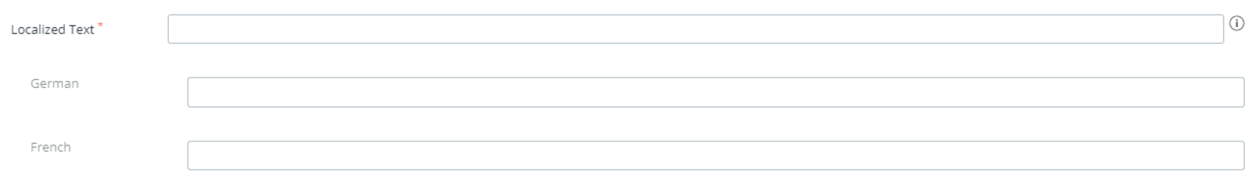
Along with normal text fields and text areas, the metadata may contain **localized** variants of such fields, which allow you to enter the field values in multiple languages. By default, only the application's default language is activated for each localized field (e.g. English).

In the detail view's or metadata wizard's content bar, you can add or remove additional languages via the "Languages" button:



You cannot remove the default language from the selection.

For each language which you activate, a new input field appears for each localized text field or text area:



FAQ and troubleshooting

Why do I get no options in some drop-down or referencing drop-down fields?

The most likely explanation for this behavior is that you do not have the **permission** to see the collection which is referenced in the affected information field. Therefore, you cannot see its child collections either and cannot choose a child collection for the field. Instead, you see an empty list.

If you want to get permissions, talk to a power user who can give you the appropriate permissions.

Manage tags for assets

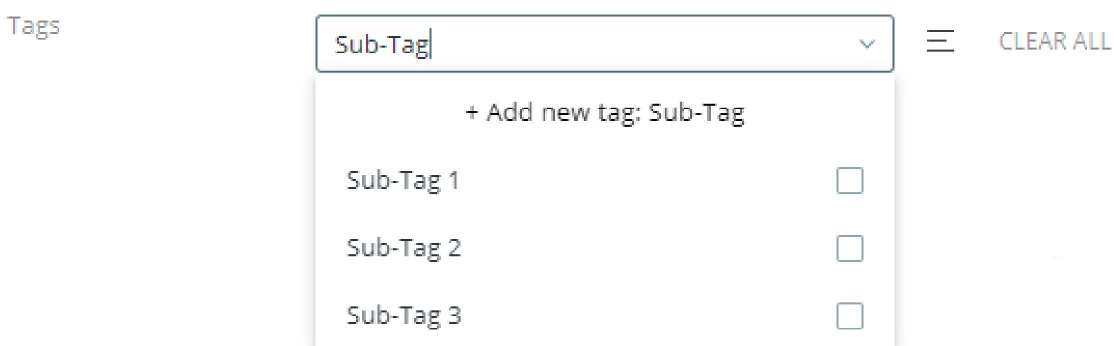
With CELUM Content's tagging functionality, you can easily label and categorize your content. You can then easily filter your assets by their tags or search for them in the Advanced Search.

Any user who is allowed to edit a tag field may add tags to an asset.

Add existing tags to an asset

1. Open an asset's detail view and go to the "Metadata" detail view tab.
2. Click on "Edit Metadata" in the content bar to make the metadata fields editable.
3. Locate the field "Tags" in the content area:

4. Click the drop-down button for the "Tags" field to choose one or multiple tags:



Alternatively, you can open a collection picker with the icon ☰, where you can select tags.

Tags are loaded in batches. You can use the "Load more" button to load additional batches.

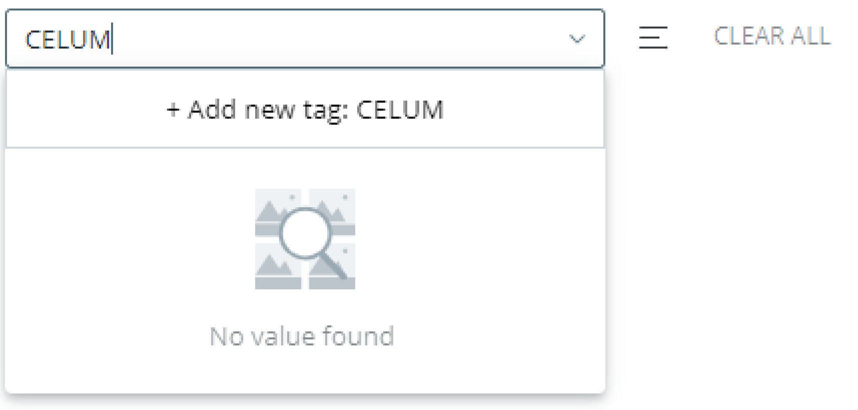
5. Save the asset's metadata.

If the **Linking Feature** is enabled for your CELUM Content server, tagged assets will automatically be **linked to the respective tags**.

Create a new tag on the fly

If you can't find a suitable existing tag, you can create a new tag directly while editing the asset's metadata:

1. Open the detail view and edit the asset's metadata in the "Metadata" tab.
2. Locate the field "Tags" in the content area.
3. Enter a tag's name in the drop-down field.
4. If the tag does not exist yet, click the button "Add new tag: <Tag name>" in the drop-down that opens:



Tag names are only shown in the default language of CELUM Content (e.g., English). However, they are case-sensitive, so you can create multiple tags with the same name but different capital and non-capital letters. For example, you can create the independent tags "CELUM", "Celum" and "celum".

5. The new tag is created inside the tag-cloud collection and is automatically added to the asset's field value.

View tags

You can see all tags that are assigned to a specific asset in the asset's detail view. Simply open the "Metadata" tab in the detail view.

To save space and make CELUM Content run faster, only 200 tags are shown for an asset. Use the "and more" button to load additional tags.

Manage tags

Tags have their own dedicated collection type, which is only visible to users who have the "View" permission for the collection type.

Once you are able to see the "Tags" collection type, you are also able to see all existing tags inside the collection type. Role-based permissions have no effect on tags. Therefore, you can move, create or delete all tags in the "Tags" collection type if you can see the type.

You can also move tags to a different level in the tree hierarchy.

Do NOT delete the tag-cloud root collection!

Be careful when managing the tags inside the "Tags" collection type. The tag-cloud collection, which is located on the root-level of the collection type, contains all other tags and is necessary to run CELUM Content. Therefore, please do not delete it!

Lock assets

In order to prevent unwanted modifications to assets, you can lock them. All locked assets are marked with the "Locked" icon in the asset list.

Asset locking imposes certain **restrictions** on what actions other CELUM Content users can execute on a locked asset.

Implicitly lock assets

While you edit an asset's metadata, it is implicitly locked. This means other users cannot edit its metadata and accidentally overwrite your changes while you are editing.

Explicitly lock assets

1. Select an asset in the asset list or lightbox.
2. Use the "Lock" action in the context menu or magic menu. A new dialog opens.
3. Optionally enter a comment to explain why you have locked the asset.
4. Click "Lock".
5. The dialog closes and no other users (except power users with super-administrator permissions) can edit the assets anymore.

View locking information

You can view an asset's locking information in the sidebar's "Information" tab. A dedicated section gives you the following information:

- The date when the lock was created
- The locking user
- The locking message (if one was entered upon locking)

Unlock assets

You can only unlock all assets which you locked yourself (either explicitly or implicitly during metadata editing). Save the asset's metadata in the detail view to remove an implicit lock, or use the "Unlock" action in the context menu or magic menu for the asset to remove an explicit lock.

Restrictions of asset locking on various actions

- Only the locking user and power users with super-administrator permissions can **edit a locked asset's metadata**.
- All users (with appropriate permissions) can still **delete locked assets**.

Please note that no information about the asset's locking status is displayed during the deletion process.

Manage asset relations

Asset relations link two similar or otherwise related assets together. You can **see all related assets for a currently selected asset** in the "Asset Relation" detail view tab.

Depending on your CELUM Content server's configuration, there can be various **types** of relations with different prerequisites for creating them. Out-of-the-box, only the "Language variant" relation type is available and will be used as an example case in this topic.

Relations can also have different **statuses**, depending on the availability of the related asset:

Broken relations are relations that were established to a now deleted asset. If asset A is related to asset B and asset B is deleted, then the relation to it will be shown as broken in asset A's detail view. Broken relations are marked with the icon and the deleted asset's preview and name are removed from the detail view tab.

Relations with **outdated versions** are relations that were established to an earlier version of the related asset. If asset C is related to version 2 of asset D and asset D gets a new version (version 3), then the relation to it will be shown as outdated in asset C's detail view. In asset D's detail view, all established relations are removed, because relations are always tied to a specific asset version. Outdated versions are marked with the icon.

Create an asset relation in the Explore View

You create relations directly in the asset list or lightbox, either via drag and drop or with the "Create relation" action in the context menu or magic menu.

For using the "Create relation" action, select **exactly two assets** in the asset list or lightbox.

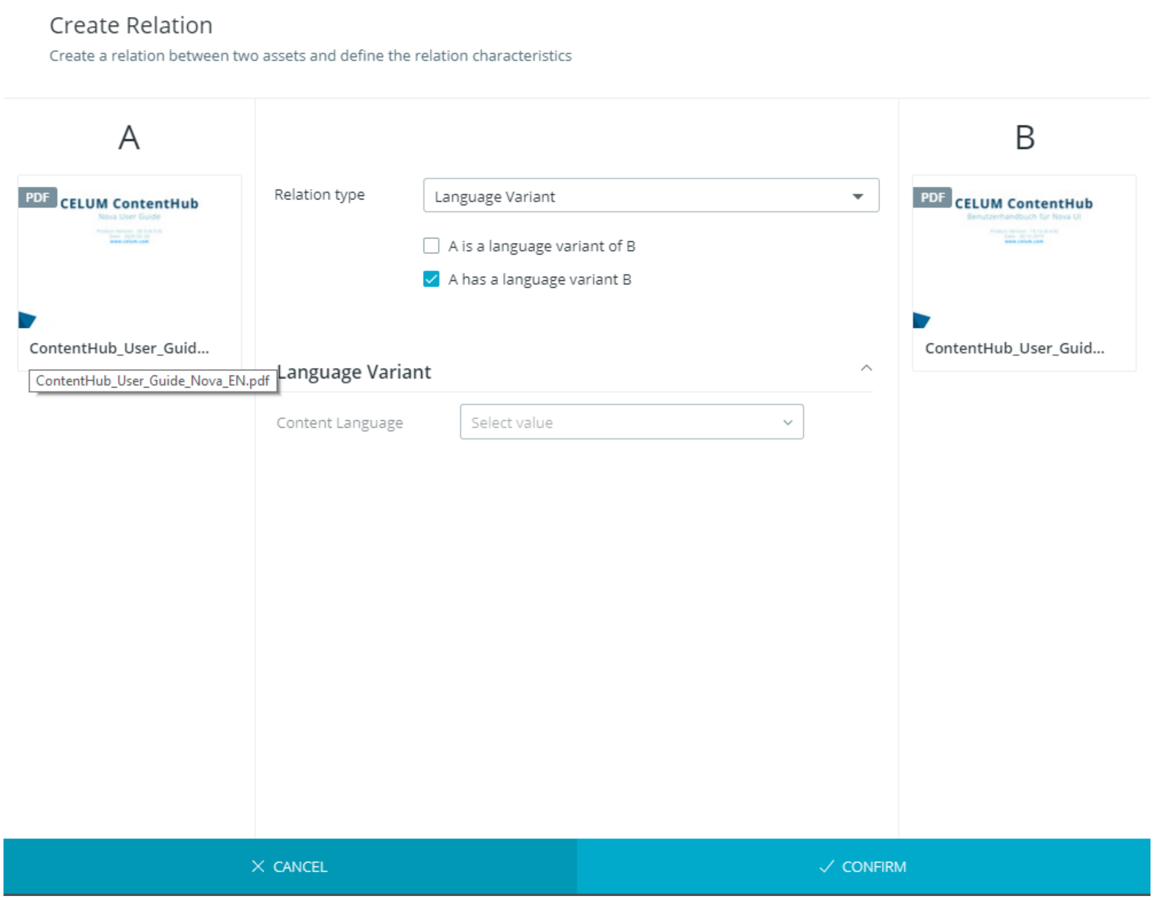
In this section, only the drag and drop method is explained in detail:

1. Select an asset, for example the "ContentHub_User_Guide_Nova_EN.pdf" asset.
2. Drag and drop the asset with your mouse onto another asset within the same collection, for example the "ContentHub_User_Guide_Nova_DE.pdf" asset. The Asset Relation dialog opens.

You can create relations between assets in different collections as well. Simply select a parent collection or "All assets" in the tree and enable the "Show content of child collections" check-box in the content bar. Then you can drag any asset onto another asset.

3. In the top section of the Asset Relation dialog, you see the previews of the two affected assets on either side with information about the relation type and direction

between them:



The asset which you dragged and dropped is always displayed on the left side (as asset A).

4. Choose a **relation type** from the drop-down menu. In this example, the type is set to "Language Variant"
5. Choose the **relation direction**. In this example, the chosen direction reads as follows: "ContentHub_User_Guide_Nova_EN.pdf" (asset A) has a language variant "ContentHub_User_Guide_Nova_DE.pdf" (asset B).
6. Set the relation's **information fields**. In this example, there is only one optional field, but your custom relations may include other fields.
7. Save the dialog with "Confirm".

In the related assets' "Asset relations" detail view tab, you can **view the established relations**.

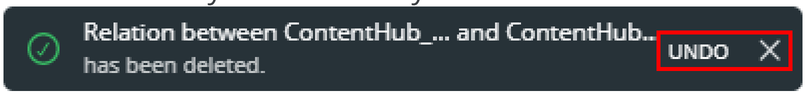
Create an asset relation in the compare view

When **comparing 2 assets**, you can create a relation between them:

1. In the compare view, open the context menu  for one of the assets.
2. In the context menu, click "Create relation".
3. The Asset Relation dialog opens and you can configure the relation **as described above**.

Delete an asset relation

Open the detail view for an asset and go to the "Asset relations" tab.

1. Click the "Delete asset relation" button in the asset relation panel's header.
2. The relation will be deleted immediately, but you can **undo** the action in a **snackbar notification** if you accidentally deleted it:


The two assets which were related are not affected by this action at all. Just the relation between them is removed.

FAQ and troubleshooting

Why are some relations shown as broken?

As described in the **above explanation section**, a relation becomes broken if one of the related assets is deleted. The target (or source) of the relation is no longer in the system, so the relation is broken on the remaining asset.

Why is a relation no longer shown in a related asset's detail view?

The most likely explanation is that one of the related assets got a new version. Relations are always established on specific asset versions, so when a new version is uploaded, the relation is not automatically established for that new version. So, the updated asset does not have the relation in its detail view anymore.

Can I edit or update an existing relation?

No, you cannot update an existing relation (change the relation's information fields, source, or target). You can only delete an existing relation and then create another one with different values.

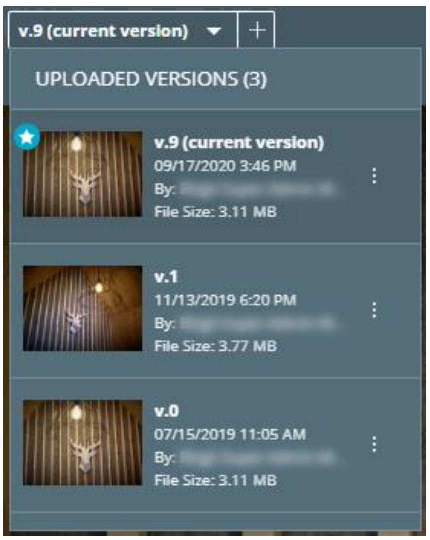
Manage asset versions

You can create new binary (file) versions for an asset in CELUM Content in multiple ways:

- You can directly **upload a new binary version** for an asset in the detail view or asset list.
- A new asset version can also be created for assets added to a workroom with the "Add current version to CELUM Content" option in CELUM Work or via a robot.

For more information on CELUM Content robots and how to add files from CELUM Work to CELUM Content, please visit the CELUM Work Online Help.

Additionally, you can manage the versions which are associated with an asset in the **detail view's "Preview" tab**:



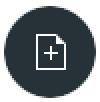
Permission-dependent functions

- Some of the managerial functions for different versions require you to have the **"Manage versions" permission** for the current asset. This affects downloading of earlier versions, deleting a version or changing the active version.
- To be able to download earlier versions of an asset, you need the **"Download original" permission** and the **"Manage versions" permission** for the current asset.
- To be able to upload a new version for an asset, you need the **global "Upload" permission** for CELUM Content as well as the **"Add versions" permission** for the current asset.

If you want to manage or add new versions, contact a **power user with super-administrator permissions** who can grant you these permissions. To learn more about CELUM Content's permission system, see the topic "**The CELUM Content permission system**".

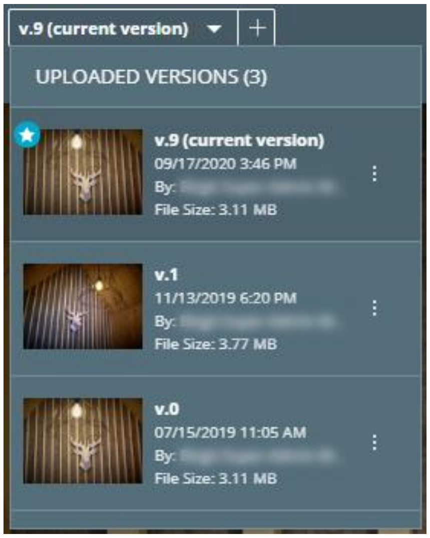
Create a new version

You have two ways to create a new version for an asset:

- **Action in the asset list or lightbox**:
    1. Select an asset in the asset list or lightbox. The action "Add new version" becomes available in the magic menu and context menu:
    
    2. Click the action. A file chooser dialog opens.
    3. Pick a file which you want to upload as a new version and confirm the dialog.
    4. The new asset version is uploaded and the preview for the asset refreshes automatically in the asset list.
- **Upload via the detail view**:
    1. Open the detail view for an asset (via double-click).
    2. In the detail view tab "Preview", click the Plus icon in the content bar. A file chooser dialog opens.
    3. Pick a file which you want to upload as a new version and confirm the dialog.
    4. The new asset version is uploaded and the preview for the asset refreshes automatically in the preview area.

Delete a version

1. In the detail view's "Preview" tab, open the version history for an asset:



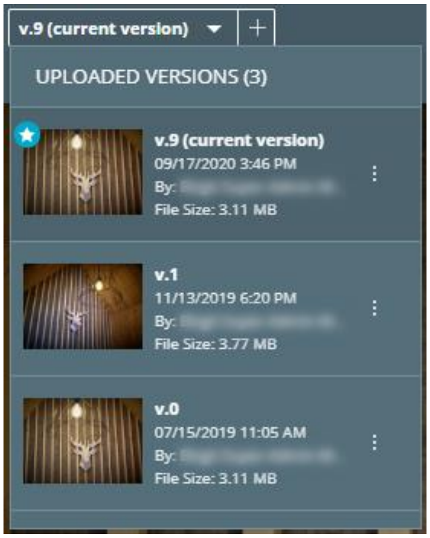
2. Open the context menu ⋮ on a version which you want to delete.
3. Click the action " Delete" in the context menu.
4. A snackbar appears in the bottom left corner of the window. Here, you can **undo** the action if you accidentally triggered it.

Deleting the newest version has no impact on the version numbering. If, for example, you delete version 11 (the newest version) of an asset and then upload another version, this new version will be version 12, even though version 11 does not exist anymore.

Download an earlier version

You can download each asset version's binary file in the detail view:

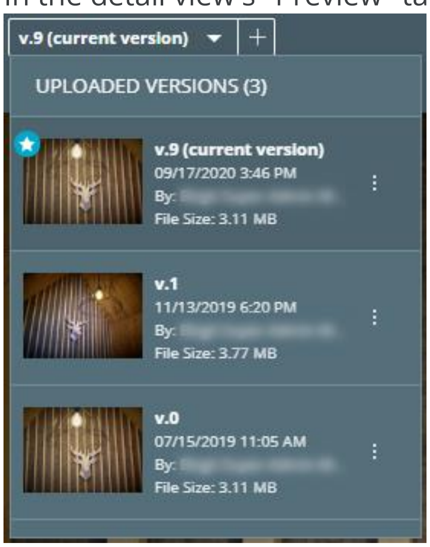
1. In the detail view's "Preview" tab, open the version history for an asset:



2. Open the context menu ⋮ on a version whose binary you want to download.
3. Click the action " Download" in the context menu.

Change the current version

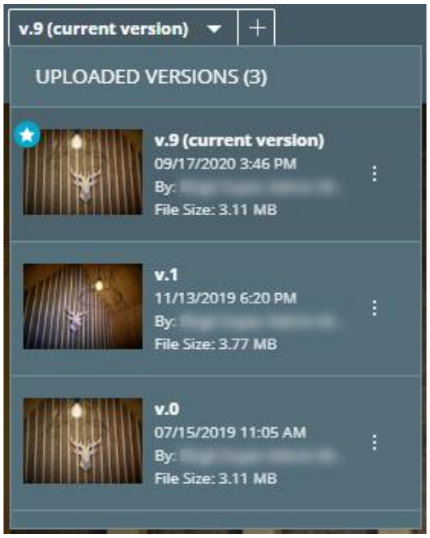
1. In the detail view's "Preview" tab, open the version history for an asset:



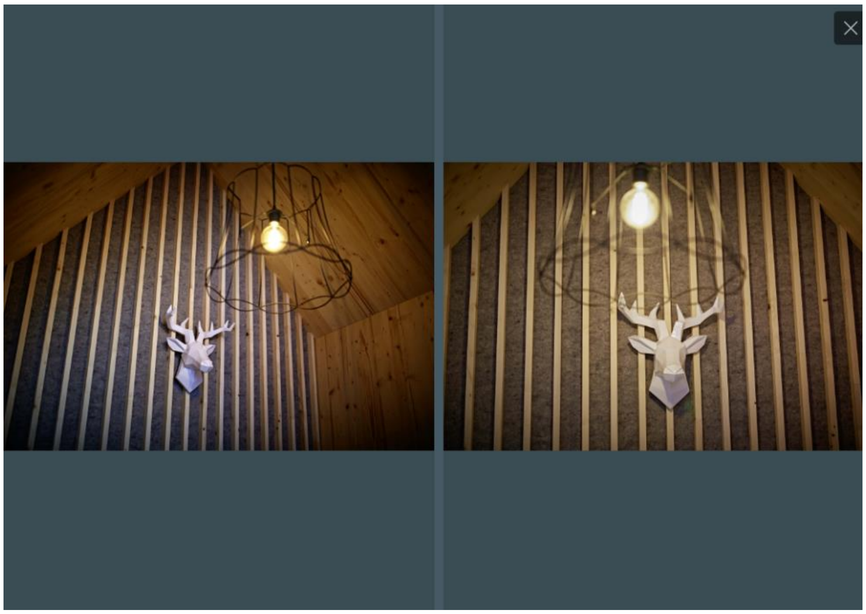
2. Open the context menu ⋮ on a version which you want to turn into the current version.
3. Click the action " Make current" in the context menu.
4. The preview reloads automatically and now shows the chosen version's file preview. Additionally, the new current version moves to the top of the list in the version history and is marked with the icon as the current version.

Compare two versions

1. In the detail view's "Preview" tab, open the version history for an asset:



2. Select an asset (via single click) so it has a darker background.
3. Open the context menu ⋮ on a version which you want to compare to the selected version.
4. Click the action " Compare" in the context menu.
5. In the preview area, you can now see the two versions' previews in the compare view:



- The left side contains the selected version's preview (Version #1 in the above example).

- The right side contains the compared version's preview (Version #0 in the above example).

You can find more information about the compare view in the topic **Compare assets**.

To close the compare view, click the ╳ icon in the top right corner of the preview area.

FAQ and troubleshooting

Why can I only compare asset versions but can't download or otherwise manage them?

The most likely explanation if you only see the "Compare with selected" menu entry is that you do not have sufficient **permissions** to manage the current asset's versions further. Please take a look at the "**Permission-dependent functions**" section above for more information.

Edit asset content

Prerequisite permissions

In order to use this feature, you need to have the "Upload Asset" **global permission** and the "Add Asset Version" **local role-based permission**. If you cannot see the "Edit text" asset context menu entry, please contact a power user who can give you the permissions.

Besides **editing asset metadata** and **managing asset versions**, you can also **edit the content** of some assets, specifically of **text assets** whose source files have the file extension ".txt". You can do so directly within the CELUM Content application:

1. Select a text asset in the asset list and right-click it.
2. Choose the "Edit text" context menu entry or select the action in the magic menu. A new full-page overlay opens and shows a text editor.
3. The editor offers different ways to **format the text**. Additionally, you can **insert links** into the text and set options for them.
4. After you finish editing, save the dialog.
5. A new version is created for the text asset. You can view, compare and delete the version in the asset's detail view.

Format text in text assets

By default, the editor opens in rich text view. You can apply one of the following formats either before you start typing or by selecting existing text:

BIU	Style the text **bold**, *italic* or underlined.
Normal	Choose one of 6 heading sizes or the normal text size.
	Create either numbered or bullet lists. Nested lists can also be created.
Tx	Remove all styling from the text.

Insert links into text assets

The icon allows you to turn selected text into a link. When you choose this option, a small input field for entering a URL appears.

Always enter the URL **with protocol information** (e.g. http://<URL>), otherwise opening the link might not work properly.

When you select a link in the text again, you have the options to

- directly open the link,
- edit the link, or
- remove the link.

Upload versions in bulk

When uploading new asset versions, it is convenient to use the asset version bulk upload as it both saves time and effort to locate the existing assets in your target collection individually.

Depending on your system's configuration, the new version bulk upload looks for existing assets with **matching original file names with or without the file extensions** for up to 200 assets at once. If existing assets whose current version has the same original asset name but different content as a newly uploaded asset are found, you can create new versions for the existing assets.

Required permissions

To use the bulk version upload, you need the following permissions:

- The global "Upload assets" permission
- The local "Add asset versions" permission on the currently selected collection

If you don't have these permissions, contact a power user with super-administrator permissions who can give them to you.

To use the bulk version upload, follow the instructions below:

1. Navigate to the collection where you want to upload new asset versions. The check will look for matching assets in all collections within the currently chosen collection.

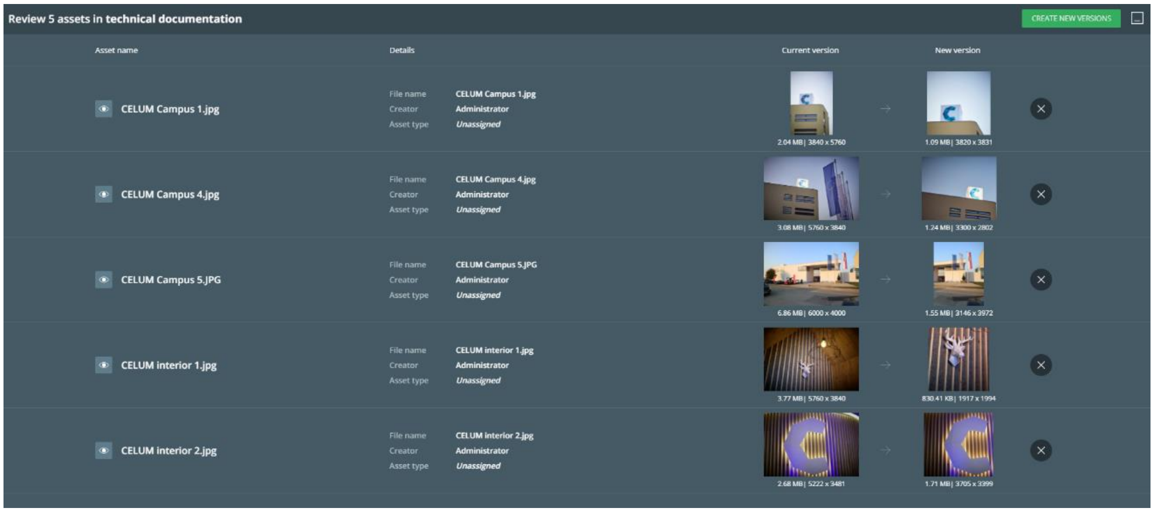
You can also upload new asset versions on the root level of a collection type. In that case, the check will look for matching assets in all available collections in the structure.

2. Click the "Add versions in bulk" action in the action area, magic menu, or context menu:

3. An asset chooser dialog opens. Select assets for upload and confirm.
4. The "Review" progress snackbar appears, showing you how many matches were found within the current collection and its child collections.

Depending on your permissions and internet connection, other snackbars may appear. Take a look at the "**Snackbar notifications**" section for more information.

5. If matching assets are found, click the "Review" button to open the "Review" overlay:

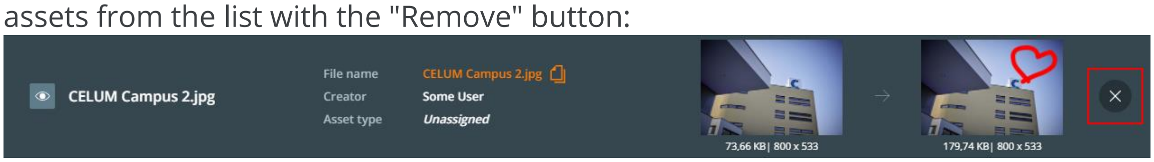


For each found existing asset whose current version matches an uploaded asset, the following information is shown:

- Asset name
- Details including binary file name, creator, and asset type
- A preview of the current asset version
- A preview of the newly uploaded asset

Optionally, click the "Open detail view in new tab" icon to open the detail view of the existing asset's current version in a new tab.

6. Choose which assets you want to add a new version to by removing unwanted assets from the list with the "Remove" button:



7. When you have selected the asset you want to update with new versions, click the **"Create new version" button** in the upper right corner of the overlay.

If you don't want to upload the selected files as new asset versions yet, you can minimize the "Review" overlay by clicking the minimize icon . Should you want to abort the upload, you can remove all assets from the list. In that case, the overlay will disappear and a "No assets updated" snackbar will be shown.

8. The overlay closes and an upload progress snackbar appears. The new files are uploaded as new asset versions for the matching assets in CELUM Content.

Snackbar notifications

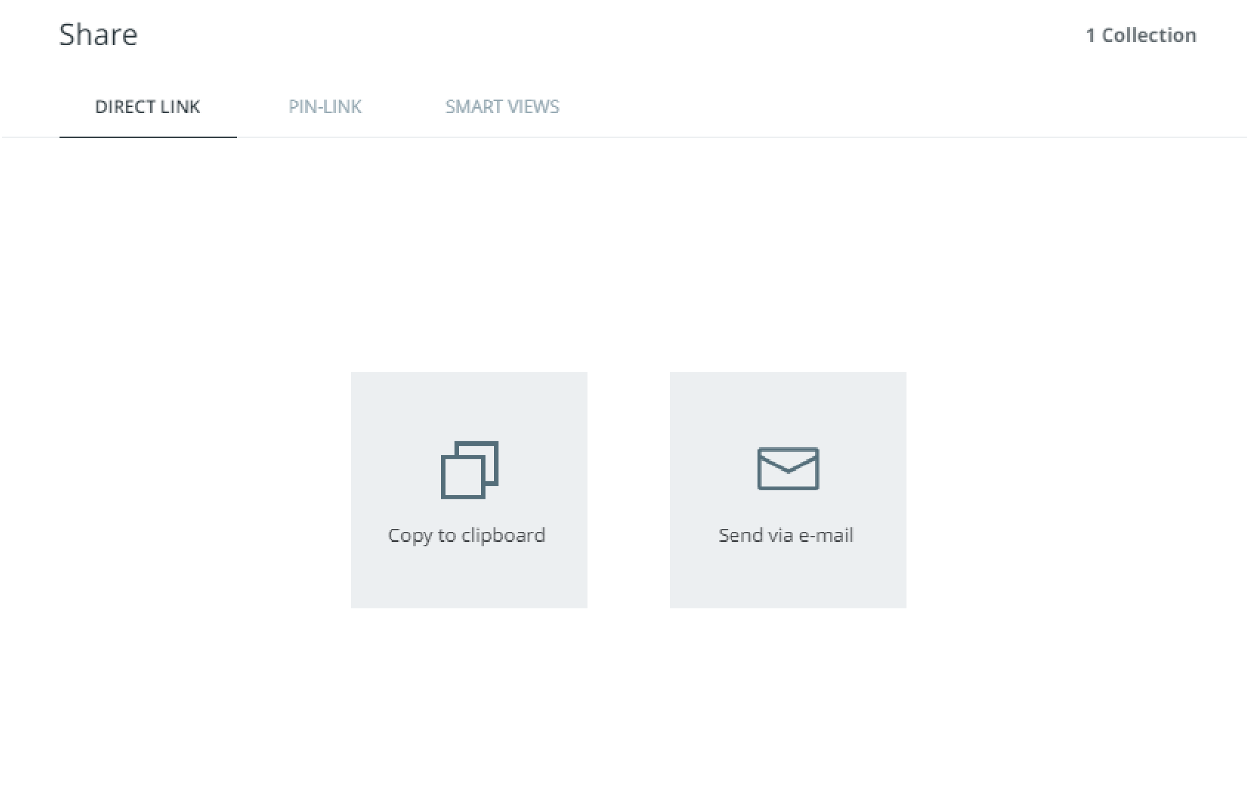
It may happen that the asset version check is unsuccessful. In those cases, an error snackbar notification appears:

- A **"No matches found"** snackbar appears if the names and/or file extensions of the selected files are not an exact match to any existing assets' current versions.
- An **"Matches ignored due to identical file content"** snackbar appears if the file(s) you selected are identical, both name-wise and content-wise, to existing asset versions in the system.
- A **"Permission denied"** snackbar appears if you don't have the necessary permission to upload new versions to the target collection.
- An **"Upload failed"** snackbar appears in cases such as interrupted internet connection. If this happens, click the "Retry" button.

A technical administrator with access to the server back-end can determine whether the check should include the file extension. Please consult the "*Web Application Properties*" chapter in the **Customer Knowledge Base** for more information.

Share assets

The easiest ways of sharing assets with other people is in the "Share" dialog, which you can open via the **"Share" action.**



The "Share" action is available in the following places for a selected asset:

- In the context menu.
- In the magic menu.
- In the detail view.

In the dialog, you have the following options for sharing your selected asset:

- Share the asset's internal **direct link** to the asset's detail view. You can use direct links to share assets with other CELUM Content users.
- Share an **existing external PIN-Link** for the current asset or **create a new one**. You can use PIN-Links to share assets with people who don't have a CELUM Content user account.

Share assets with other users

You can share dedicated **direct links** for assets in CELUM Content. These links are a quick way of pointing other users to an asset:

1. Select one or multiple assets in the asset list.
2. Open the "Share" dialog for your selection via the "Share" action in the **action area**, **magic menu** or **context menu**.
3. The tab "Direct Link" is opened by default.
4. Copy the direct link for the current selection via "Copy to Clipboard" or send it directly via e-mail.
5. If you choose to send it via e-mail, your operating system's e-mail client opens and automatically pastes the direct into the body of a new e-mail. A single hyperlink is pasted for the whole selection.

You can send direct links to any CELUM Content user. However, the user must have the appropriate permissions in order to see the shared asset(s).

People who do not have a CELUM Content account cannot open direct links. Use **PIN-Links** for external sharing instead.

What happens when a direct link is opened?

If an asset's direct link is opened in a browser, it shows the asset's **detail view** with the same tab open as when the link was shared.

Share assets with external people

With CELUM Content's **PIN** and **Smart Views** functionalities, you can **share selected content for a specific period of time** with **other people** who do not have access to CELUM Content. This ensures that the people you make content available to can ONLY download the content you want them to have, when you want them to have it.

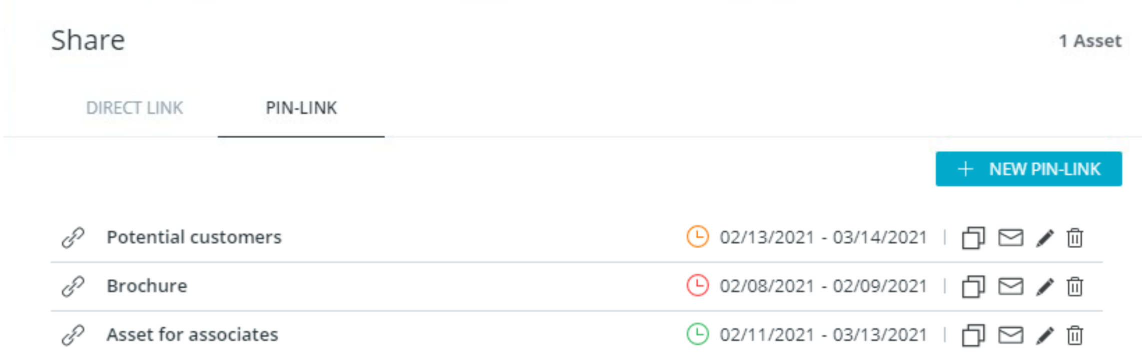
You need the local permission "Manage own PIN" on the selected content, otherwise you won't be able to use the PIN-Link function.

View and share an existing PIN-Link

You can view and share all PIN-Links which you have created on a selected asset in the "Share" dialog.

This tab is only visible if you have selected exactly one asset.

1. Open the "Share" dialog for an asset via the **action area**, **magic menu** or **context menu**.
2. Switch to the "PIN-Link" tab in the dialog to see a list of all PIN-Links:



Permissions necessary for seeing others' PIN-Links

If you don't have the global permission "Administer PINs from other users", you can only see your own PIN-Links, not links created by other users.

You can perform actions on each PIN-Link (left to right): Share it via copied link or e-mail, **edit it**, and delete it.

The "clock" icon next to each PIN-Link shows its status:

- An active PIN-Link will have the green status icon next to the date.

- An inactive link (whose validity has expired) will have a red status icon .
- If the PIN-Link has an orange icon , it will be valid from a defined time in the future.

You can also hover over different sections to see additional information on them.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the collection where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

The PIN landing page

Recipients of the PIN-Link can open the link in a browser, which opens the PIN landing page. On the landing page, recipients can choose from the available download formats for each asset to directly download each asset to their local file system. Alternatively, they can download all assets contained in the PIN-Link with one click or filter the available assets by their file type to download only assets of a specific type.

If they choose to download all or multiple assets, a ZIP file is created which is subsequently downloaded.

If the sent PIN-Link is invalid or unavailable, recipients will see an according error message instead of the included assets.

Create a new PIN-Link

You can create a PIN-Link with a variety of settings for a single asset:

1. Open the "Share" dialog for an asset via the **action area**, **magic menu** or **context menu**.
2. Switch to the "PIN-Link" tab in the dialog.

This tab is only available if you have selected exactly one asset.

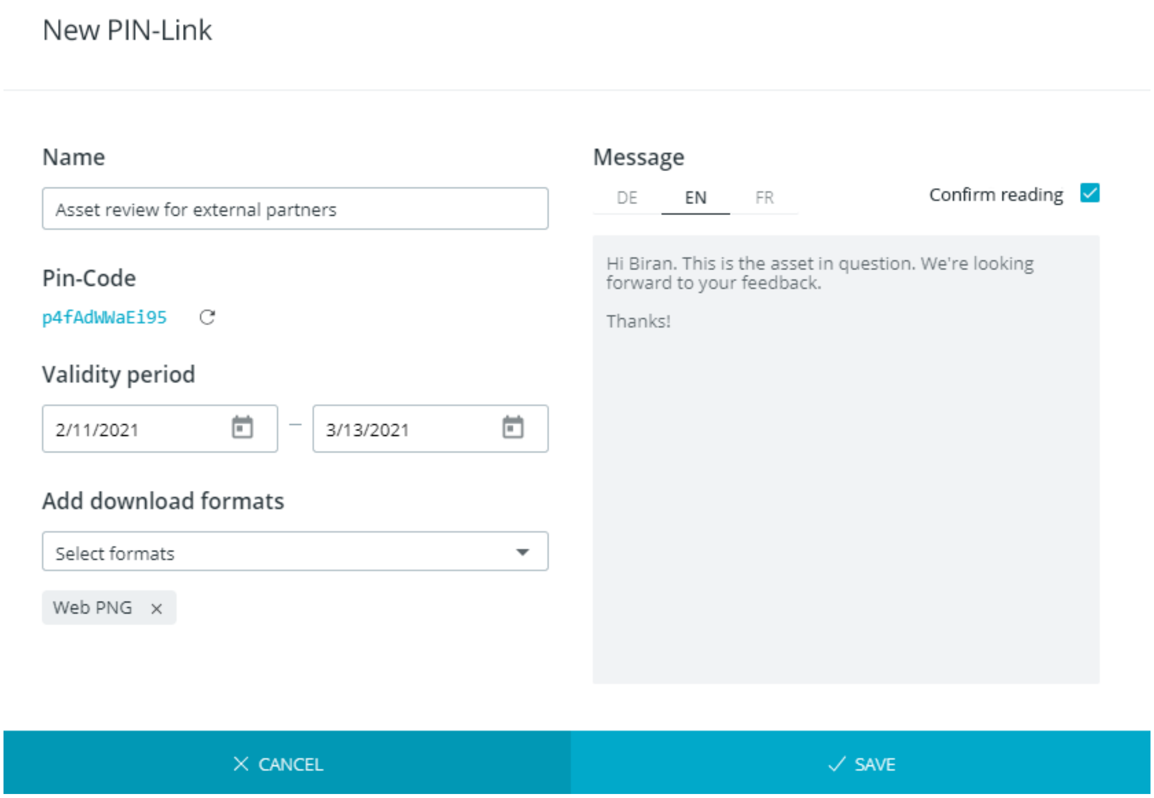
3. Click the "Create PIN-Link" button NEW PIN-LINK. A new dialog opens.

Quick PIN-Link with default configuration

Click "Save" immediately after the dialog opens to save the created PIN-Link with its default settings.

By default, the **name** of the PIN-Link matches the name of the shared asset. The **validity period** is set to 30 days, starting with the creation date. The preselected **download format** depends on your CELUM Content server's configuration.

4. In the left section of the dialog, you can see an overview of the basic information about the PIN-Link. There you can set the following:



- **The name of the PIN-Link**: Simply change the name inside the text field.
- **PIN-code**: The PIN-code is the unique ID for the link. Click on the refresh icon next to the already generated PIN-code to generate a different PIN-code.
- **Validity period**: States the time period in which the PIN-Link is active. Click on the date icons on the left and right side to open the calendar and set your preferred validity period.
- **Download formats**: The amount and the default download formats displayed depend on your configured PIN-Link download format settings.

Click "Select formats" to select one or more download formats for your asset.

5. In the right section, you can optionally write a note to the PIN-Link recipient. You can choose:
   - **The language of the message**: By default, English is the set language. Click on the respective language abbreviation to switch. Your language options depend on your CELUM Content configuration. The message will be shown to the recipients when they open the PIN-Link.

The message is only shown if the language of the PIN landing page matches the defined language of the message. If the language doesn't match, the recipient can open the message dialog manually by clicking the "Information" icon in the landing page.

   - **"Confirm reading" selection**: If you select this option, a dialog containing the message will appear on the PIN landing page provided that the recipient's locale matches the selected language of the message.
6. To confirm, click "Save". The PIN-Link is automatically copied to clipboard and ready for use.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the collection where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

Share a Smart View

You can create Smart Views on collections, but not on single assets. Find the instructions for creating and sharing smart views in **Share collections with external people**.

Download assets

CELUM Content offers powerful **conversion capabilities** which allow you to download assets in a variety of different resolutions, dimensions, or file formats. Specific resolutions, dimensions, and file formats are combined in **download formats,** which are applied to assets during the conversion for download.

Download a single asset in original format

For downloading a single asset, there's a shortcut to download it in its original format:

1. Select an asset in the asset list.
2. Click the "Download Original" action in the magic menu or context menu.
3. The asset is immediately downloaded. You can find it in your default download location.

To download multiple selected assets in their original format, there's a dedicated **"Download" action** instead.

Download assets in any format

1. Select one or more assets in the asset list or lightbox.
2. Click the "Download" action in the action area, magic menu or context menu. A new dialog with all available download formats opens.
3. Choose a download format from the list and click "Download".

The dialog shows only download formats which are supported for **all** selected assets.

4. If the chosen download format has a copyright disclaimer message enabled, check "Accept" and click "Confirm" to continue.
5. The chosen assets are downloaded in the chosen download format as a ZIP archive. You can find it in your default download location.
   The download progress is indicated by a snackbar notification in the bottom left corner of the screen:
   

In rare cases, the conversion may fail if not all assets can be downloaded in the chosen format due to technical constraints or connection problems. Please consult **Deal with download issues** about what to do in such cases.

Pause and resume a download

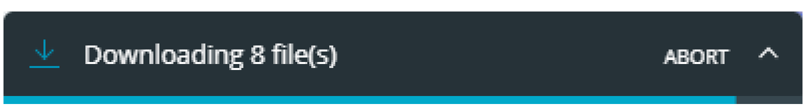
You can pause any download in your browser's Download Manager:

- **Microsoft® Internet Explorer / Edge**: Click the "Pause" or "Resume" button located next to the current download's status at the bottom of the browser window.
- **Google Chrome**: Right-click the ongoing download in the download bar (usually at the bottom of the browser window) and click "Pause" or "Resume".
- **Mozilla Firefox**: Open the download progress via the browser's toolbar. Right-click on the ongoing download and click "Pause" or "Resume".

All listed browsers except Google Chrome allow you to exit the browser application completely and still retain your paused download progress after you open the browser again. In Google Chrome, downloads are canceled when you exit the application.

Cancel a download

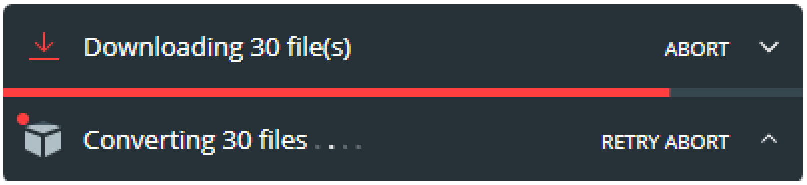
Depending on the file size and conversion effort for the assets, you may not see the download snackbar long enough to cancel the download.
If you are downloading multiple assets or the conversion takes a long time, you will see the snackbar and can cancel the download with the "Abort" option in the snackbar:



Alternatively, you can cancel an ongoing download in the browser's Download Manager.

Deal with download issues

In the rare cases when the processing of assets during the download fails, the download snackbar notification in the bottom left corner of the screen turns red:

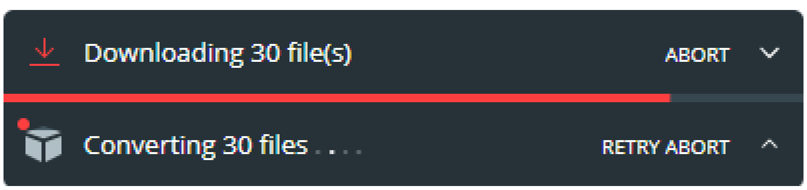


This can have various reasons, for example:

- The conversion of one or multiple assets may fail for technical reasons, even though the chosen download format supports the asset(s).
- The server which is responsible for the conversion may be unavailable.

Retry failed assets

Sometimes, a conversion error is only a temporary hiccup which may resolve itself. This can for example be the case if your connection to the CELUM Content server is slow. Use the "Retry" option in the download snackbar to try the download again. This triggers another conversion attempt and you can see if the problem persists or is now resolved:



Edit images before download

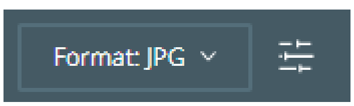
CELUM Content offers you various options to edit image-type assets before downloading them in a selected download format.

1. Select an image-type asset in the Explore view.
2. Right-click to open the context menu and select the " Edit image" menu item.

> The "Edit image" menu item will be visible if you have permission to use at least one download format that has the image editing option enabled.

3. An image editor overlay opens where you can edit your image before download.
4. First, choose a **target format** in the top right corner of the image editor. The target format determines which modifications you can make on your image.

> In the drop-down menu you can see only those download formats that are enabled for the Image Editor. This configuration is done by a power-user.

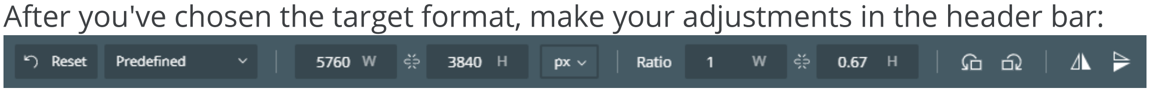


- **Original Format**: The image won't be converted to a different file type. Instead, it will be downloaded in its original file type (e.g. as a PNG or JPG image).

> "Original Format" is only supported for assets with the following file types: BMP, JPG, JPE, JPEG, JPX, JFIF, PNG, TIF and TIFF.

- Other formats (e.g. "**PNG**" or "**JPG**") convert the image to the target format during download.

5. After you've chosen the target format, make your adjustments in the header bar:



- **Choose a predefined format**: Use the “Predefined” drop-down menu to select a resolution or ratio value for the crop box size. The selected image will be cropped to the chosen size or ratio. If defined for a specific format, you can get additional information about it by hovering your mouse over it.

> If configured for a specific format, you can get more information about it by hovering your mouse over it.

As a power user, you can define a list of image sizes and dimension ratios available as options in the drop-down menu. You can find information on how to do that in the Administrator Guide in the **Customer Knowledge Base** (requires login).

- **Crop an image**: The crop box dimensions can be specified in resolution (px, mm) or ratio values for width and height. You can resize the crop box in two ways:
  - Drag the cropping handles on either side or in the corners of the image.
  - For more precision, use the dimension (width and height) and ratio fields in the toolbar.

You can link the resolution values to a specific aspect ratio by clicking the chain icon ( ). This enables you to crop the image proportionally to the specified ratio.

- **Rotate an image**: Use the "rotate left" and "rotate right" icons in the edit bar to rotate the image 90 degrees in the respective directions.
- **Flip an image**: Choose between flipping an image vertically or horizontally.

6. Optionally, click on the "Colorspace" icon next to the download format drop-down menu to select a color space.

Depending on the image format of the asset, the selection of colorspaces may vary. The "Original" color space is preselected and always available.

7. Click the download button to download the edited image.

To restore the image to its original state, click the "Reset" button.

Once you close the image editor overlay, the image will be restored to its original state. The changes you made are not stored.

Save assets as favorites

If you often work with the same assets in the system, you may want to create a shortcut to them. These shortcuts in CELUM Content are called "favorites".

Set an asset as a favorite

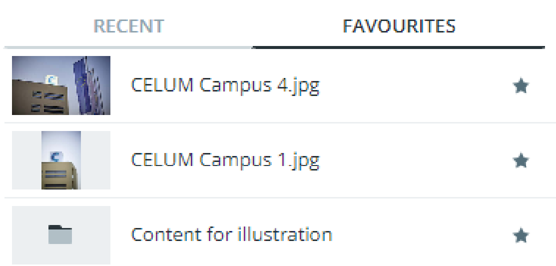
1. Select one or multiple assets that you want to add to your favorites.

> You can only select either assets or a collection, not both at the same time.

2. Click the "Add to favourites" action in the action area, magic menu or context menu (in asset list or lightbox) to set it as a favorite.
3. The assets get marked with a small  icon in the asset list.

Open a favorite asset

In the **Dashboard**, you can view and access favorite assets in the **"Favourites" widget.**



Double-click a favorite **asset** in the widget to directly open its detail view and see all information about it.

Remove an asset from your favorites

You have two ways to remove an asset from your favorites:

- In the **Explore View:**
    1. Select one or multiple favorite asseta in the tree, asset list, or lightbox.

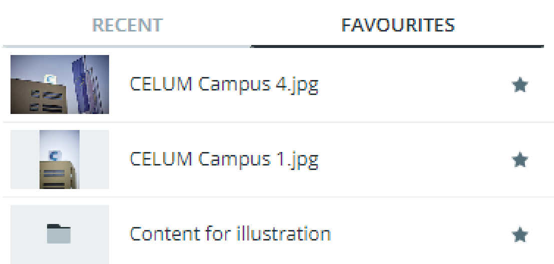
You can only select either assets or a collection, not both at the same time.

2. Click the "Remove from favourites" action in the **action area**, **magic menu** or **context menu** to remove a favorite.

For multi-selection of assets, the "Remove from favourites" action is only available if you have selected only assets which are already marked as favorite. If you select a non-favorite asset, you can only use the "Favorite" action.

3. Tthe icon disappears from the asset(s) in the list.

- In the **Dashboard**, you remove a favorite object in the **"Favourites" widget** by clicking the small icon:



Add assets to CELUM Work

CELUM Work, one of CELUM's cloud services, provides seamless collaboration with agile task management and asset handling in one place. In combination with CELUM Content, it makes managing collaborative teamwork easy by adding a CELUM Content asset to a new or existing Workroom.

Once added to a Workroom, the asset is represented by an **asset with the same name** in the asset explorer of the Workroom. **The added asset acts independently of the asset in CELUM Content**. This means that actions such as renaming and deleting the asset (in CELUM Content) or asset (in CELUM Work) will not have any impact on the other application.

Prerequisites and permissions

- A **personal CELUM Cloud user account** which is allowed to use your organization's subscribed services and you need to be **connected to it** in CELUM Content.

> The organization you connect to must have a valid subscription for both CELUM Work and CELUM Content.

- The following **role-based permissions** on **at least one permission-defining parent collection of the assets** you want to add:

> If you cannot grant these permissions to yourself, contact a power user with super-administrator permissions who can give them to you.
>
> As a power user with super-administrator permissions, you can create roles with these permissions in the **Configuration Management Application (CMA)**, which you can access via the Advanced UI. You can find instructions for this in the **Administrator Guide** in the **Customer Knowledge Base**.

  - **View** the collection
  - **View** assets within the collection
  - **Add** assets and collections
  - **Move** the collection and its child collections and move assets
  - **Add** assets within the collection **to another security context**
  - **Download** assets within the collection
- The **permission to create** Workrooms (if you want to add to a new Workroom).

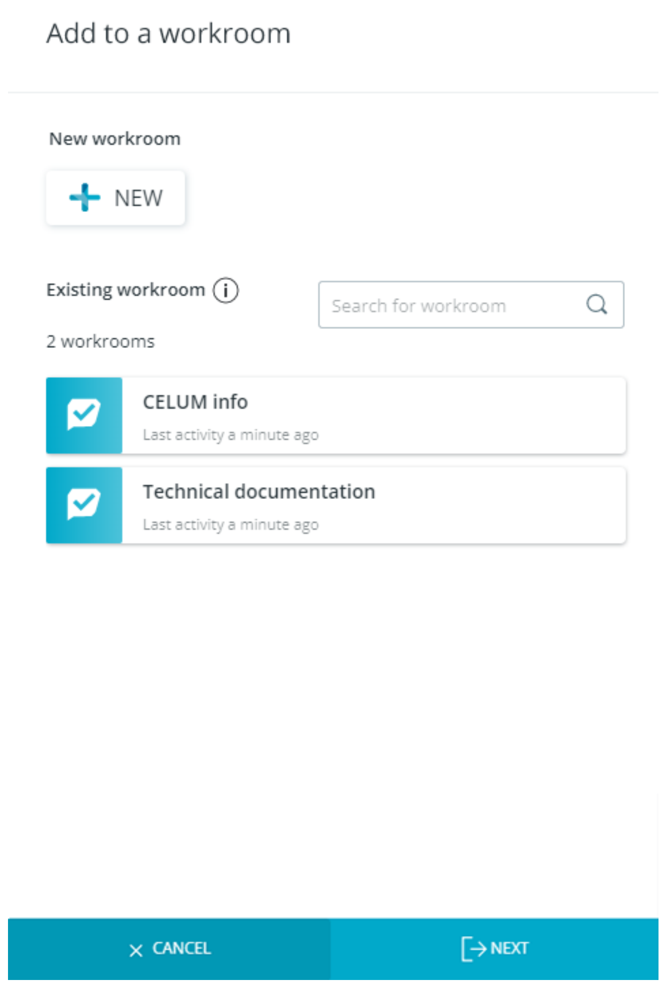
The organisation manager for the organisation that you are connected to can grant this permission to you.

Add assets to a Workroom and create tasks

1. Navigate to a collection with assets and select one or multiple assets.
2. Open the context menu on the assets and click "Add to a Workroom", or select the same option in the magic menu.

Under some circumstances, the action or context menu entry is disabled and can't be used. Check the **Q&A section** for more information.

3. You are redirected to CELUM Work (in a new browser tab) and an "Add to a Workroom" dialog opens:



> You only see existing Workrooms in the organisation whose ID you used to **connect to your Cloud account**. A new Workroom will also be created in that organization.

4. There, you can select between 2 options:
   - **Create a new Workroom** and add the selected assets to it.

> The option will not be displayed in the dialog if you don't have permission to create a Workroom in your organization or will be disabled if your organization has reached its Workroom limit.

   - **Choose an existing Workroom** to add the assets to, and click the "Next" button.
5. After you have created or chosen a Workroom, you are redirected to the asset explorer in the Workroom and an "Add to a folder" dialog opens.
6. In the dialog, select a folder from the list or create a new one. Selected assets will be added to this folder.

> If you've created a new folder, be sure to also select it in the list afterwards to ensure your assets are added where you want them.

7. Click the "Add" button. A new sub-trigger opens where you can choose between 2 options:
   - **Adding assets and creating tasks.**
     1. Click on the "Add and create tasks" to open the "Create tasks" dialog.
     2. In the "Create tasks" dialog, you can:
        1. Create separate tasks for the selected assets (if you selected multiple assets) or create a single task.
        2. Add a form. The form will be added to the created tasks.
     3. Click on "Create" in the "Create tasks" dialog. If you:
        - Didn't add a form, the chosen assets are added to the selected folder in the asset explorer and new tasks are created.
        - Added a form, you can decide to either create the tasks with an empty form (the "Create" option) or to fill in the selected form before creation (the "Fill in the selected form before creation" option). To finish creation:

        - With a blank form, click on "Create" in the "Create tasks" dialog.
        - With a filled in form, click on "Create" in the "Fill in and create" dialog.
    - **Just adding the selected assets to the folder.** Click "Add".
8. The dialog closes and the chosen assets are added to the selected folder in the asset explorer and, optionally, new tasks are created (with or without a blank/filled out form) on the selected task list. Click on "View task" in the progress snackbar to open a newly-created task.

Added assets will have an "Available in CELUM Work" symbol and a link to their location in CELUM Work will be displayed in the **sidebar** and **detail view**. If a corresponding asset is permanently deleted in CELUM Work or the Workroom is finished/deleted, the symbol will be grayed out and the link will be removed.

Deleting assets in CELUM Content

The deletion of an asset that was added to CELUM Work **will not have any impact** on the added file in CELUM Work.

FAQ and troubleshooting

Why is the "Add to a Workroom" action disabled for some assets?

The "Add to a workroom" menu entry will be disabled if the number of selected assets exceeds 1000 or if the selected assets are not directly located inside the currently viewed collection. To only see the assets located inside the selected collection, click on "Hide content of child collections" in the content bar.

Furthermore, adding is only possible in a specific collection, but not in the root collection (collection type), in "All assets" view, in the Advanced Search or on tags.

Why can't I see the "Add and create tasks" option when adding assets to a workroom?

There are 2 cases where the "Add and create tasks" will not be available:

- The selected folder is used in a "Automatic creation" robot.
- All task lists have a "Creation restriction" robot on them.

You can find more information about CELUM Work in the CELUM help portal:

- Create Workrooms
- Apply Workroom robots

Delete or restore assets

In case you no longer have use for specific objects on the CELUM Content server, you can permanently delete them from the system.

When the Trash Bin function is configured on the system, the assets are moved into the Trash Bin first. The assets in there can either be **deleted permanently** or **restored**.

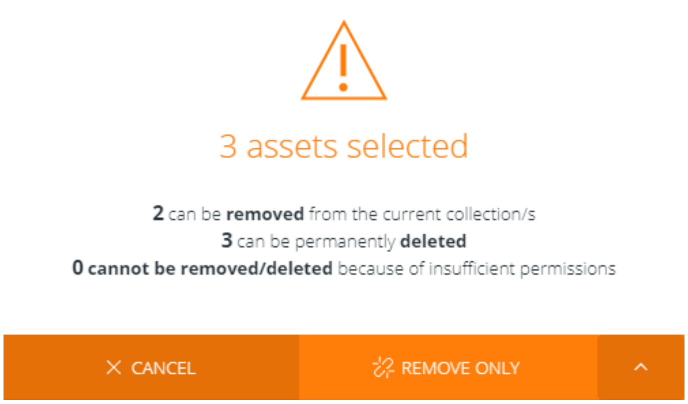
Delete assets permanently or place them in the Trash Bin

Unlike **removing assets from a single collection**, you can also **permanently delete** assets from the entire CELUM Content system.

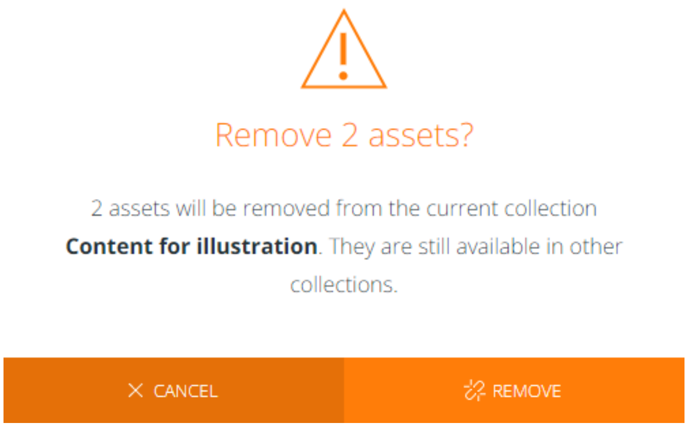
1. Select one or multiple assets in the asset list.
2. Use the "Delete" action in either the context menu or the magic menu. A confirmation dialog opens.

If you don't have permission to delete an asset, you'll still see the action, but will get an "Insufficient permissions" dialog upon clicking.

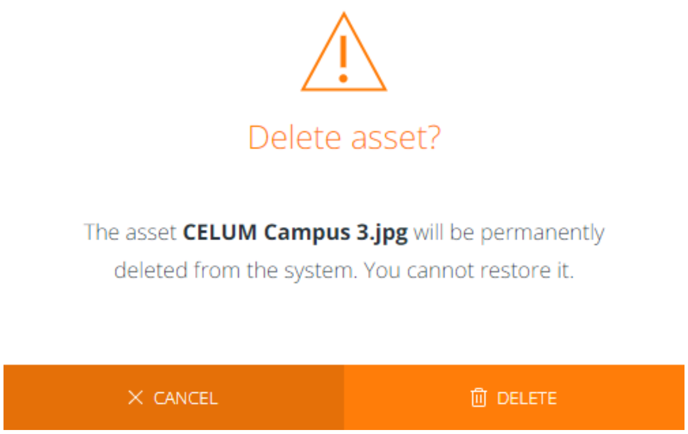
3. The confirmation dialog shows different content depending on the status of the selected asset(s):
   - If at least one asset was linked to multiple permission-defining collections, you will see a list of assets which can be permanently deleted or removed from their parent collection.
     You can then decide if you want to delete all assets from the system or only remove the listed assets from their collection(s):



   - If all selected assets were linked to multiple permission-defining collections but you lack the local "Remove asset" permission on one of the parent collections, you can only remove them from the current collection:



- If all selected assets only have one permission-defining parent collection, you can only delete them completely:



4. Depending on your asset selection, you can do the following:
   - Click the option icon  in the confirmation dialog's footer and select "Delete" or "Remove and delete" from the dialog options
   - Click "Delete" directly in the dialog footer.
5. This will result in the following, depending on the system configuration:
   - If the **Trash Bin function is activated**, the asset(s) will be placed in the Trash Bin.
   - If the **Trash Bin function is not activated**, the asset(s) will be permanently deleted.

6. If the assets were placed in the Trash Bin, you can **permanently delete them** or **restore them** from there.

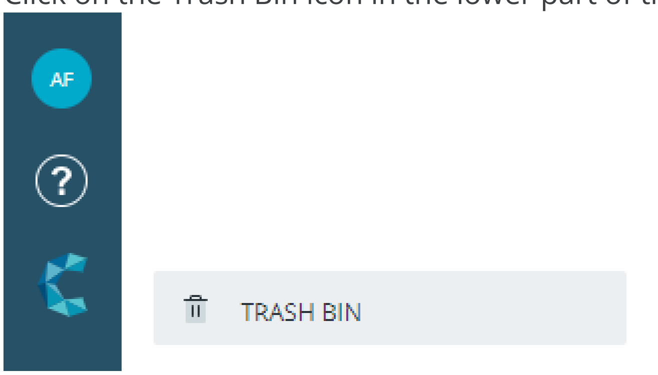
Permanently delete assets from the Trash Bin

Prerequisites for this function:

- An activated Trash Bin function for CELUM Content. If it is activated, you can see the Trash Bin at the lower edge of the tree in the Explore View.
- Administrator permission to see the assets inside the Trash Bin.

In case the above-mentioned prerequisites are not met, please contact your power user to restore the assets in question.

1. Open the Explore View.
2. Click on the Trash Bin icon in the lower part of the tree to see the deleted assets.



3. Right-click on a deleted asset to open the context menu.
4. Click on "Delete" in the context menu.
5. Click on "Delete" in the confirmation dialog to permanently delete the asset from the CELUM Content system.

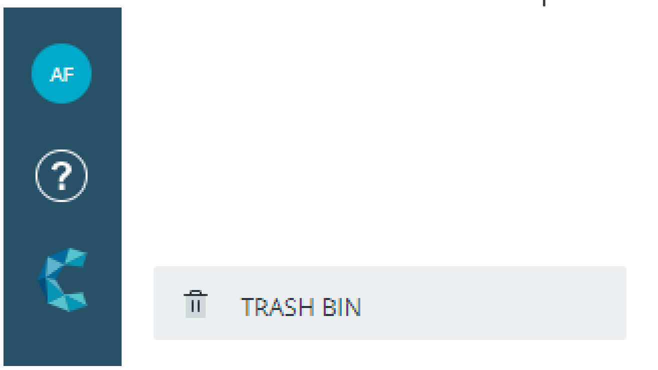
Restore assets from the Trash Bin

Prerequisites for this function:

- An activated Trash Bin function for CELUM Content. If it is activated, you can see the Trash Bin at the lower edge of the tree in the Explore View.
- Administrator permission to see the assets inside the Trash Bin.

In case the above-mentioned prerequisites are not met, please contact your power user to restore the assets in question.

1. Go to the Explore View.
2. Click on the Trash Bin icon in the lower part of the tree.



3. Right-click on a deleted asset to open the context menu.
4. Click on "Restore". A collection picker dialog opens.
5. Select a target collection to designate where you want to restore your asset.

You will not be able to restore an asset into a collection you don't have permission for.

6. Click on "Restore" to restore your asset to the target collection.

FAQ and troubleshooting

I see the Trash Bin in the tree, but I can't see any assets in it

If you can't see assets inside the Trash Bin, then the Trash Bin is either empty or you're missing permissions to see assets inside it. These have to be set by a power-user in the **Advanced UI**.

They are local permissions on the root collection of the Trash Bin. The root collection is not visible in the Nova UI, only its content is shown.

Find content

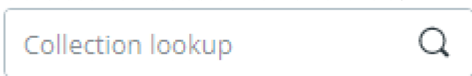
Find content

CELUM Content provides powerful search capabilities. This topic covers the simplest search cases, searching for collections **by their name**, searching for assets **by any attribute**, and viewing the **most recently updated objects**.

Search for collections by their name

You can search for **collections** by their name with the **collection lookup** in the tree. It returns the found collections directly inside the tree:

1. Enter a specific collection type to show the collection lookup.
2. The collection lookup appears between the collection type chooser and the "Main Structure" section of the tree:



3. Enter a search term in the lookup field.
4. The "Main Structure" section automatically refreshes and shows you all collections whose names contain the search term.

To see a found collection's assets, click the collection in the tree.

To see a found collection inside its larger hierarchy, double-click it. The collection's parent hierarchy loads in the tree.

Find assets via the full text search

For assets, you can use the **full text search field** in the Dashboard or the header bar of the Explore View to search not only by name, but by any metadata or attribute. Results match **any of the entered search terms**:

You can configure the applied search logic for the full text search in the **Content administration** to be one of the following:

- AND logic: When configured with an AND logic, the full text search will only bring back results that have all of the given terms present in their asset data (metadata or contents).

- OR logic: When configured with an OR logic, the full text search will bring back results that have any of the given terms present in their asset data (metadata or contents).

If you want to restrict the full text search to specific types of metadata, you can exclude certain field types from the search with the **search options** menu.

1. Enter one or multiple search terms into the field.

Search terms and phrase search

Search terms are divided by spaces, so if you enter three separate words into the search field, the system will interpret them as three **single-word search terms**. An exception to this rule are **multi-word phrases**. If you put multiple words in quotation marks (" "), they will be interpreted as a single search term.

By default, you can include up to 10 search terms. After you've entered 10 distinct search terms, any additional characters will be appended to the last search term you entered.

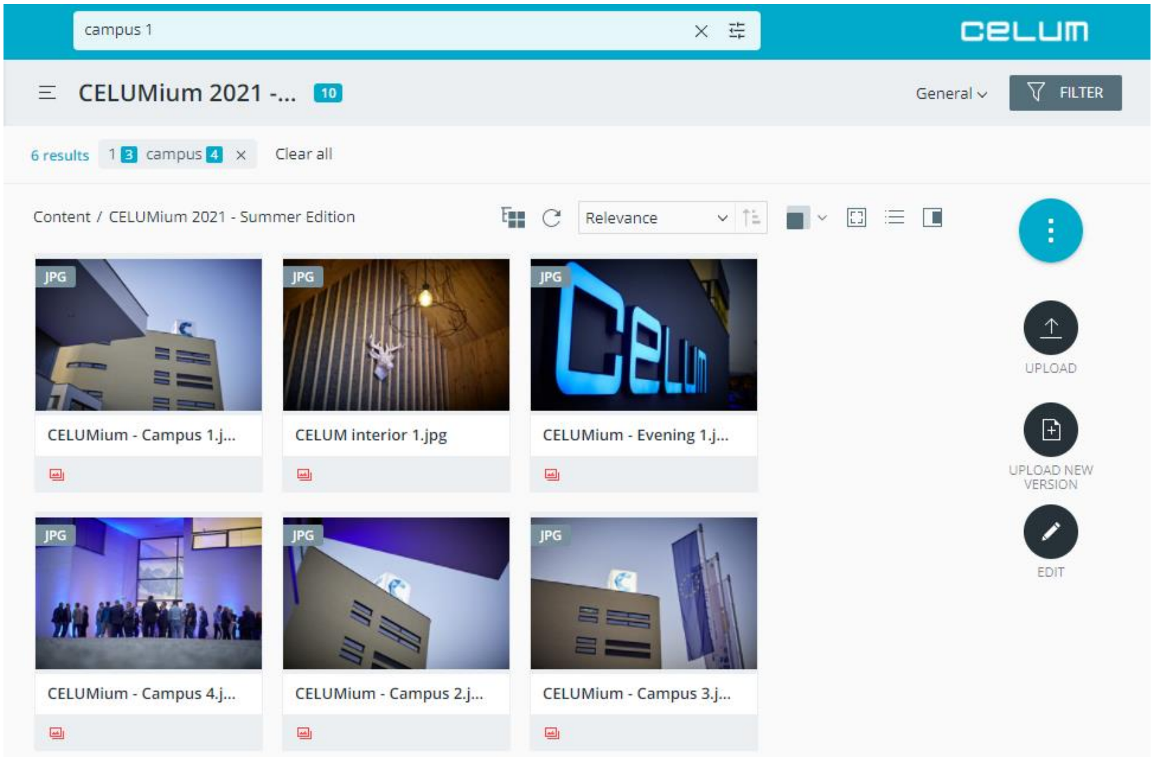
Use case example: We recommend using phrase search for getting the correct search results for Asset Type names consisting of multi-word phrases.

2. Press **ENTER** on your keyboard to start the search.

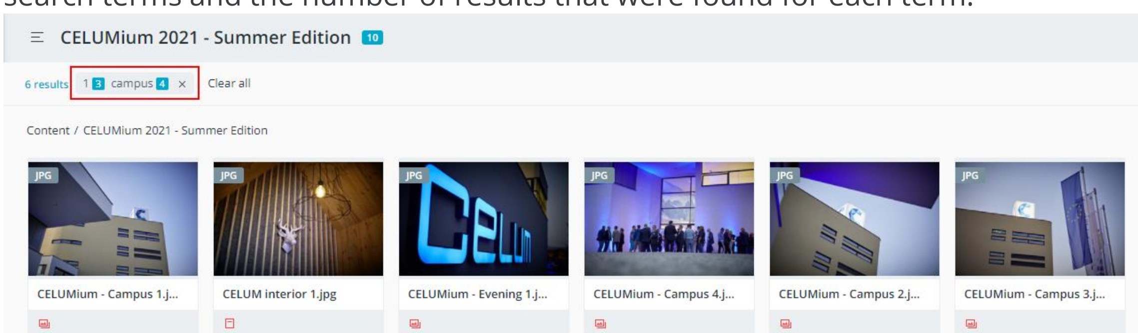
If you start the search on the Dashboard, you'll be redirected to the Explore View after you press ENTER.

3. The full text search returns the found assets directly in the asset list. The asset list automatically refreshes and shows all assets that contain the search term(s) in any

of their metadata:



4. A small **chip** appears underneath the collection header and shows all entered search terms and the number of results that were found for each term:



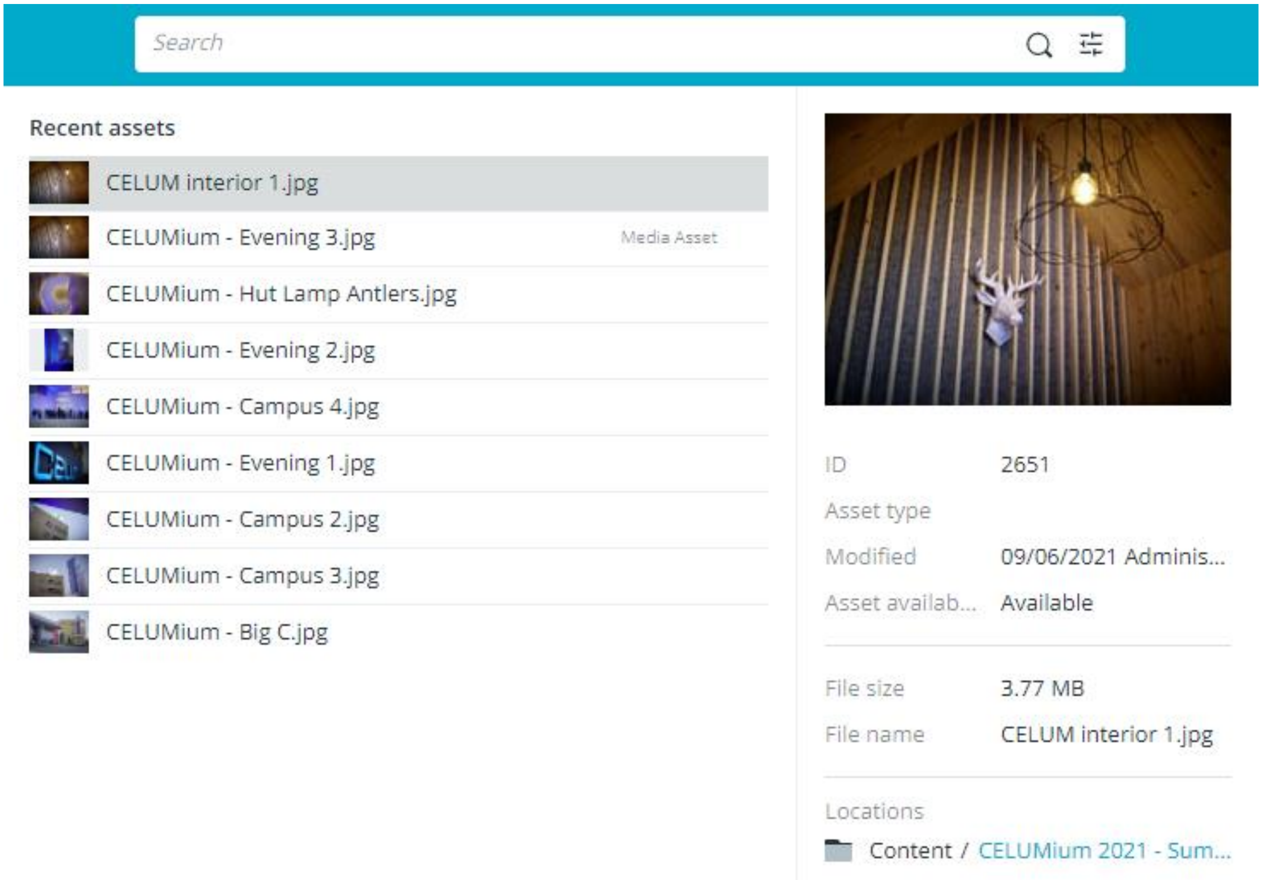
5. The found assets are sorted by their **relevance** in the asset list. You can find information on how the relevance is calculated **below**.

Clear the full text search

To clear the full text search you need to either use the ✕ icon in the search chip or use the "Clear all" button. Note that "Clear all" will remove also your selected **filter** values.

See your most recent assets

Just click on the **full text search field** in the Dashboard or Explore View to open a drop-down that shows your most recently updated assets:



By clicking on a recent asset, you'll see basic information about the asset directly in the result list.

By double-clicking a recent asset, the asset's detail view opens.

Calculation of the search relevance

The relevance is calculated depending on how often and in which type of metadata the search term is found. If the search term(s) are found in the asset name, original file name, or collection name, the result will be ranked highest, followed by information fields, parent collection paths and finally file properties. If the search term(s) are found in a combination of these metadata for the same object, the relevance accumulates.

A practical example

You're searching for the term "red". In the current collection, there are 4 assets:

- "Red car" has the search term in its asset name and original file name.
- "Car 1" has the search term in its original file name and its "Description" information field (in 2 languages).
- "Silver car with red upholstery" has the search term in its asset name and in its "Interior Description" information field (in 1 language).
- "Black car" has the search term in 3 different information fields.

The result will list the "Red car" asset at the top, because the search term is in 2 top-ranked fields. The "Car 1" asset will come in second, because it has the search term in 1 top-ranked field and 1 information field in 2 languages. The "Silver car with red upholstery" asset will come in third, because, while it also has the search term in 1 top-ranked field and 1 information field, it has it in 1 language. "Black car" is in last position because it doesn't have the search term in any top-ranking fields, but just in information fields, which are ranked lower.

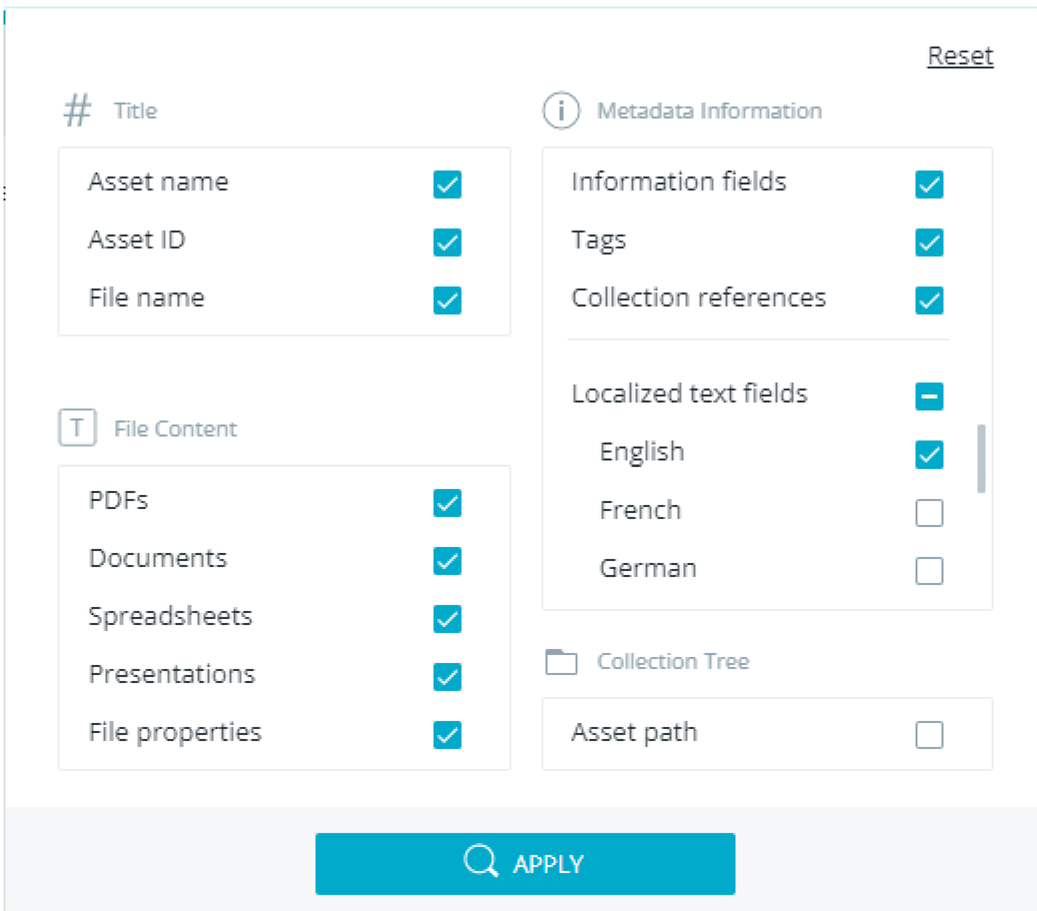
The rank calculation changes if you deselect a specific type of metadata or language from the **search options**. Results may therefore be sorted differently on subsequent searches.

Haven't found what you were looking for? Refine your search results with **asset filters** or use the **advanced search**.

Configure the full text search

The full text search field in Dashboard, Explore View, and Advanced Search can be restricted to only search in certain metadata types and exclude others.

1. Click the search options icon in the full text field.
2. The search options open underneath the field, showing the various metadata types:



The search options are separated into five categories:

- **Title**: This section determines which name properties are searched. If all fields are selected, the full text search looks for the search term(s) in the asset name, original asset name and the ID of an asset.

In the **Advanced Search**, the collection name is also available as an option.

- **File Content**: This section determines in which types of asset content the search looks for the search term.

You can find a list of searchable document types below.

- **Metadata Information**: This section determines which types of metadata are searched. If all types are selected, the full text search looks for the search term(s) in all listed metadata types.

The option "Information fields" includes all non-localized information fields configured for your specific CELUM Content server as well as certain asset properties like creator user, modifier user and asset type.

- **Localized text fields**: This section determines in which languages values of multi-language fields are searched. If multiple languages are selected, the full text search looks for the search term(s) in all configured **localized information fields** in the selected language(s) as well as all non-localized metadata (i.e. the metadata selected in the other option categories). By default, the configured application languages are pre-selected.

All languages configured in your system as either application languages, collection languages or information field languages are listed.

You can select all available languages via a checkbox next to the category header:

Localized text fields ☐

- **Collection Tree**: This section determines if the parent collection structure is also searched. If the "Asset path" field is selected, the full text search looks for the search term(s) in the names of collections in the current collection hierarchy.

3. Select metadata and languages in which the search term(s) should be looked for. If you deselect a metadata type, the search will NOT look through fields of that type.

On dialog-level (across all sections), you need to select at least 1 search option. Therefore, if you deselect every option, the last remaining one will be grayed out and non-editable.

4. Click the "**APPLY**" button to save your changes and trigger the search.
5. The search options icon now shows a blue dot to indicate that the default options have been changed: .

> If you only change the languages in the "Localized text fields" section, the icon won't change, because adding or removing a language doesn't influence which types of metadata are searched through.

File types with searchable content

In the "File Content" category, you can select which asset content should be looked through during a search. The different types contain the following file extensions for binaries:

- **PDFs** comprise the file extension ".pdf".
- **Documents** comprise the file extensions ".doc", ".docm", ".docx", ".dot", ".dotm", ".dotx", ".wpd", ".odt", ".odg", ".ai", ".eps", ".indd", ".ind", ".inx", ".idml", ".indb", ".indt", ".indl", and ".pages".

> **Searching content of ".txt" and ".rtf" files**
>
> By default, the content of assets based on ".txt" and ".rtf" files is NOT searchable. However, if your administrator has configured these file types to also be searchable, you will still find their content.

- **Spreadsheets** comprise file extensions ".csv", ".xls", ".xlsb", ".xlsm", ".xlsx", ".xlt", ".xltm", ".xltx", ".sxc", ".ods", and ".numbers".
- **Presentations** comprise the file extensions ".pot", ".potx", ".pps", ".ppsx", ".ppsm", ".ppt", ".pptx", ".pptm", ".sxi", ".odp", and ".key".

Additionally, if you check the option "**File properties**", the search will also look through the asset properties that were transferred from the source file during upload. These properties are also listed in the detail view of assets in the tab "File information".

Reset the search options to default

1. Open the search options via their icon in the full text search field.
2. In the search options, click "Reset".
3. The default options are reselected and the icon turns back to its original state: .

> **Additional search configurations**
>
> In the "Content administration" area (accessible via your user settings menu), you have additional options for configuring the search behavior. See **Administer the system** for more information.

Filter assets

If you haven't found what you were looking for with the **search**, the Explore View provides powerful **filtering** capabilities which allow you to filter assets by any asset property, information field, or a combination of multiple asset properties and information fields.

Filtering works in two steps:

1. First, you **select filter widgets** (e.g. asset properties or information fields) in the **filter panel**. Selected filter widgets are added to the **collection header** above the asset list.
2. Then you **edit the criteria** for each filter widget in the collection header and apply the filter criteria to the system.

By default, only the "General" filter widget is selected and visible in the collection header.

Filters are applied according to three principles:

- The filters are applied to the **current contents of the asset list**. This means if you have already selected a specific collection, then only the current subset of assets will be filtered further.
- Combining multiple filter criteria for the same filter widget returns assets which match **any** of the chosen criteria. For example, adding the "Plastic" and "Wood" filter criteria for the "Material" filter widget will return assets that have either "Plastic" or "Wood" in the "Material" information field.
- Combining filter criteria for multiple filter widgets returns assets which match **at least one of the specified criteria for each chosen category**. For example, adding the "Plastic" and "Wood" filter criteria for the "Material" filter widget and the "Chair" and "Table" filter criteria for the "Furniture type" filter widget will return assets that have a combination of the chosen filter criteria in the "Material" and "Furniture type" information fields. These can be either plastic chairs, wooden chairs, plastic tables, or wooden tables.

Filter assets by general properties

Unless otherwise specified, the "General" filter widget is selected and displayed in the collection header above the asset list by default:

An administrator for your system may have configured different default widgets instead of the "General" one.

It enables you to filter assets by various general criteria.

1. Click the "General" button in the collection header. A drop-down menu with the general filter settings appears.
2. Check the check box next to any of the following criteria to apply them to the asset list:
    - **Media type**: Display all assets of a certain type, like "Image", "Document", "Audio", Video", "Text", "3D" or "Undefined" if the type can't be determined.

    For you to see the "3D" type, your organization must have a subscription to the new 3D cloud service.

    - **Metadata status**: Display assets with a certain metadata status, like conversion error or locked state.
    - **Orientation**: Display assets of a certain orientation.
    - **Size**: Display assets of a certain file size range.
3. The asset list automatically refreshes when you select or deselect a criterion.

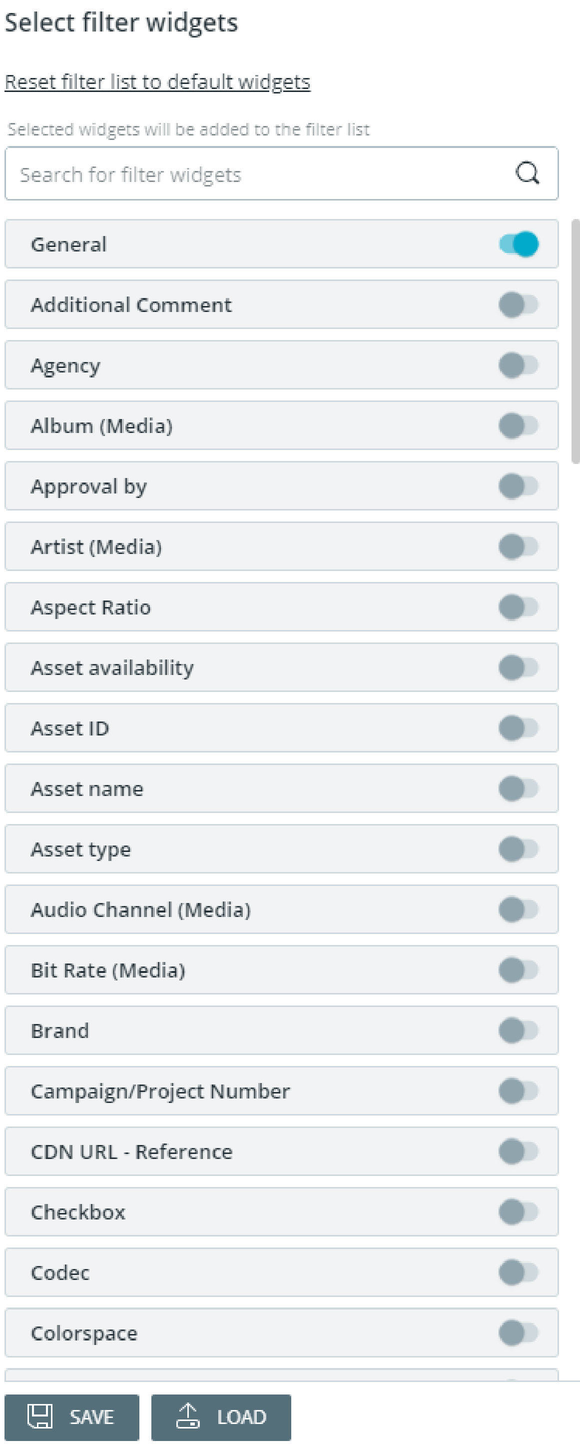
If the "General" widget is not currently selected, simply select it again in the filter panel.

Select additional filter widgets

You can select a maximum of 7 filter widgets.

1. In the Explore View, click on the filter button 

in the **collection header**. The filter panel opens:



2. In the filter panel, you will see all available filter widgets in your system, with each widget representing a specific metadata field.

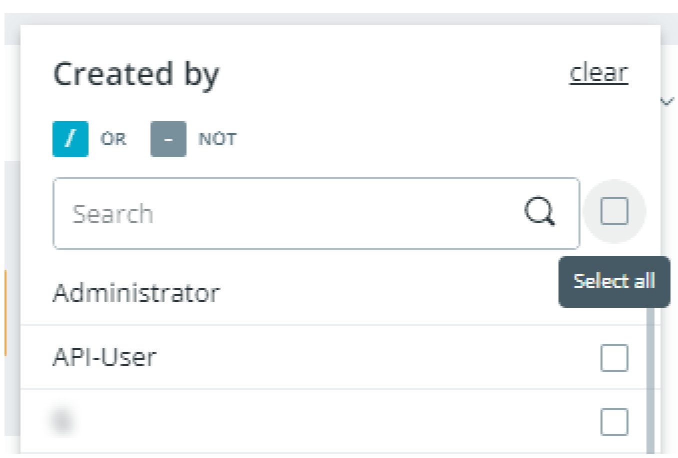
You can search for specific filter widgets with the small lookup box above the list.

3. Click the toggle button next to each widget to select it and turn the button to the "ON" position .
4. For each metadata field which you turn on, a new filter widget is added to the collection header above the asset list. You can then **edit these widgets** to filter for specific criteria:

Edit and apply filter criteria

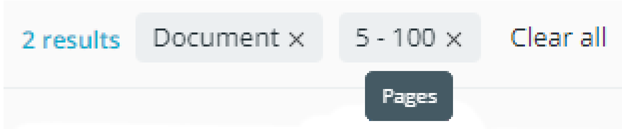
1. Click on any of the filter widgets in the collection header to open its configuration area in a drop-down menu.
2. You can apply filter criteria to the asset list in two ways:
   - Enter a value in the configuration area. You can also use **modifiers** in order to filter for different aspects of the entered value. Click "Add" to apply the entered value to the asset list. This method is available for text and date fields.
   - Select the check box for a criterion in the configuration area. The filter for the criterion is applied to the asset list automatically. This method is available for referencing drop-down fields or other fields with fixed options.

You can also search for specific options via a search field or select all available options:



If more than 200 options are available, the "Select all" checkbox is disabled.

3. All applied filter criteria are displayed as small chips under the collection header. Upon mouse-over, you'll see the filter widget that they belong to:



Criteria modifiers

- **Relational operators**: A drop-down which provides modifiers for number or date filter widgets, like range, larger than, or smaller than. By default, the filter checks for a single value.
- **Language chooser**: If a filter widget checks for a localized metadata field or referencing drop-down field, you can choose the language in which the filter criterion should be matched.

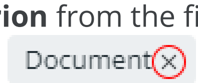
Default value of the language chooser

The default value of the language chooser is set by a power-user in the **Content administration**. It can either be set to the current application language, or to a specific, fixed language.

If the chosen language is not available for the field that is being searched, then the default will either fall back to your chosen application language or the application's default language.

- **Search**: If a filter widget provides a list with multiple criteria, you can use the Search field to narrow down the list and find the criteria which you want to apply faster.
- **Collection picker**: If a filter widget provides a list of collections to choose from, you can open a **collection picker** with the ☰ button next to the Search field. The collection picker makes it easier to pick the right collections by showing them within their larger hierarchy.
- **"Use" toggle button**: If you have selected a filter widget for a metadata field of the "Check box" type, the asset list is filtered for assets which have this field *unchecked* in their metadata. To filter for assets which have this field *checked*, turn the toggle button on.

Remove a filter criterion or widget

- To **remove a single applied criterion** from the filter criteria list, simply click the small "x" icon on the criterion chip: 

.

- To **remove all applied criteria for a specific widget** without removing the widget from the collection header, simply expand the widget and click "clear" in it.
- To **remove all applied criteria**, click "Clear all" next to the active filters.
- To **remove a filter widget**, turn off the respective toggle button in the filter panel.
- To **reset the selected widgets to the default**, click the "Reset filter list to default widgets" button in the filter panel.

Using the same filters often?

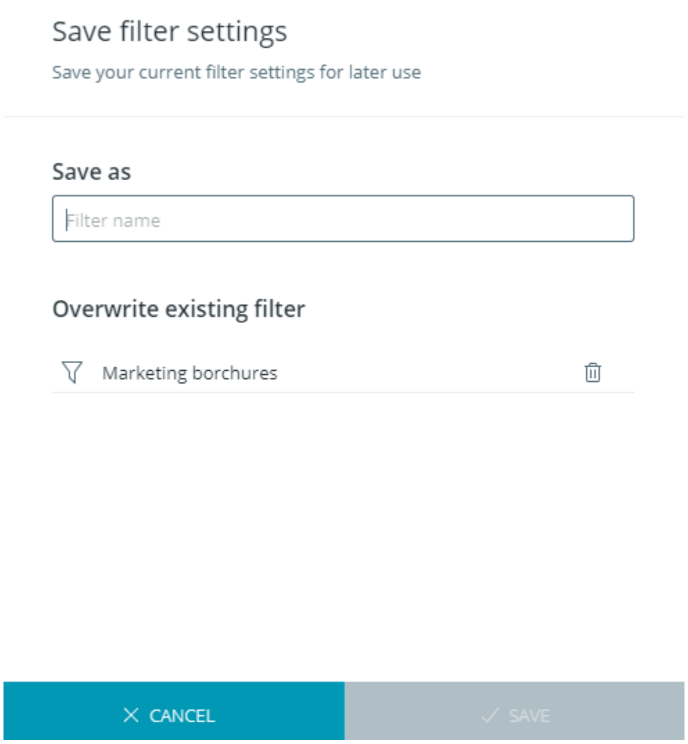
You can **save your currently selected filters** and reuse them later.

Save and load filters

If you often use the same filter criteria, you can save the activated filters and load them again for quick access.

Save active filters

1. After you have chosen some filter widgets and **applied some filter criteria** to the asset list, open the filter panel.
2. Click the "Save" button  at the bottom of the filter panel.
3. A new dialog opens:

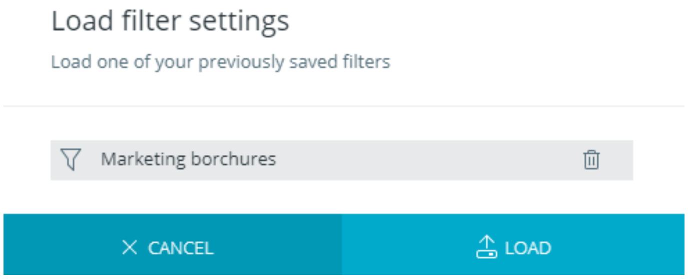


4. Enter a name or select an existing filter to overwrite it.
5. Click "Save" to save the filter under a new name or "Overwrite" to save it under the existing filter's name.

Load a saved filter

1. Open the filter panel.
2. Click the "Load" button  at the bottom of the filter panel.

3. A new dialog opens:



> You can only see saved filters which you saved yourself. Other users' filters are not visible.

4. Select the filter you want to load and click "Load" to proceed.
5. The loaded filter widgets and filter criteria are immediately applied to the asset list.

Delete a saved filter

1. Open the filter panel.
2. Click the "Load" button 

at the bottom of the filter panel.
3. A new dialog opens.
4. Click the delete button next to a filter's name to delete it.

Rename a saved filter

You can rename your saved search configurations in both the "Save filter settings" and "Load filter settings" dialog if the initially chosen name no longer reflects what the saved configuration represents.

1. Hover your cursor over a saved configuration. A small "Edit" icon appears.
2. Click on the "Edit" icon.
3. Enter a new name.
4. Click the "Save" icon or press ENTER on your keyboard.

FAQ

Can I edit and overwrite an existing saved filter?

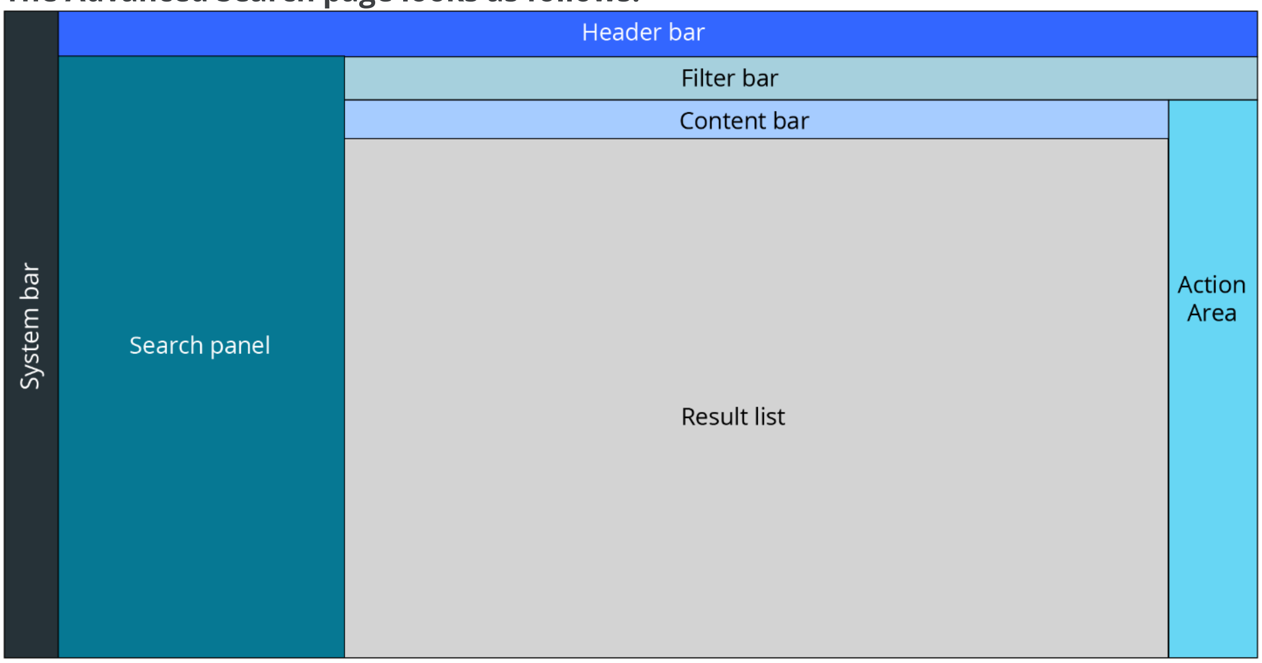
You can edit a saved filter by adjusting its filter criteria and then overwriting an existing filter in the saving dialog.

Use the advanced search

The Advanced Search is a page in which you can further refine your search. You open the Advanced Search by clicking the "Search" button in the **system bar**:

While the full text search in the Explore View only looks for assets, the full text search in the Advanced Search returns both assets and collections.

The Advanced Search page looks as follows:



- **System bar**: Just like in the Dashboard and Explore View, the system bar also holds the navigation buttons to the other parts of the application, as well as your user settings and help menu.
- **Header bar**: Contains the **full text search field**.
- **Filter bar**: In the Filter bar, you can see an overview of all **active filter criteria** and the "Clear all" button that resets the active filters.
- **Content bar**: You can navigate between filter results for assets or collections. Additionally, you can adjust how the assets and collections are presented in the result list with the buttons on the right side.
- **Search panel**: The search panel on the left side contains the "Manage widgets" button that you use to **select the filter widgets**, which make your search more

effective and specific. Each filter widget represents an information field or asset property. Once selected, you can edit the criteria for each filter widget, **combine the widgets**, or **save and load** them for later use.

- **Action area**: The action area on the right side of the browser window gives you access to either featured actions or the **magic menu**, which lists all actions for the current context via the magic button.
- **Result list**: In the result list, you can see the search results for assets or collections based on activated filters, and perform actions on them.

Result list behaves like Explore View

In the result list, you can execute almost all actions on objects that you can also execute in the Explore View, for example opening a found object's **detail view** and **editing its metadata**. You can also adjust the list itself in the same way as the asset list in the Explore View, for example by opening the sidebar with the icon in the content bar or by **changing and rearranging the columns in list view**.

Search by any metadata via the full text search

The **full text search** looks through all metadata that your content has and returns content that matches the entered search term(s) in any metadata field. The full text search field is located in the header bar.

1. Enter one or multiple search terms into the field.

Search terms and phrase search

Search terms are divided by spaces, so if you enter three separate words into the search field, the system will interpret them as three **single-word search terms**. An exception to this rule are **multi-word phrases**. If you put multiple words in quotation marks (" "), they will be interpreted as a single search term.

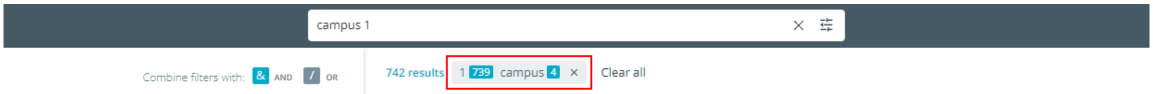
By default, you can include up to 10 search terms. After you've entered 10 distinct search terms, any additional characters will be appended to the last search term you entered.

Use case example: We recommend using phrase search for getting the correct search results for Asset Type names consisting of multi-word phrases.

2. Press **ENTER** on your keyboard to start the search.
3. The result list shows all objects that contain the search term(s) in any of their metadata.

If you want to restrict the full text search to specific types of metadata, you can exclude certain field types from the search with the **search options** menu.

4. In the filter bar, a small **chip** appears and shows all entered search terms and the number of results that was found for each term:



Additionally, you can combine the full text search with other filter widgets:

5. Navigate between seeing search results for assets or collections in the result list:

6. The found assets are sorted by the "**Relevance**" column in the result list. You can find information on how the relevance is calculated **below**.

The "Relevance" column is only available in the "Assets" tab of the result list, not in the "Collections" tab.

Search by specific metadata via filter widgets

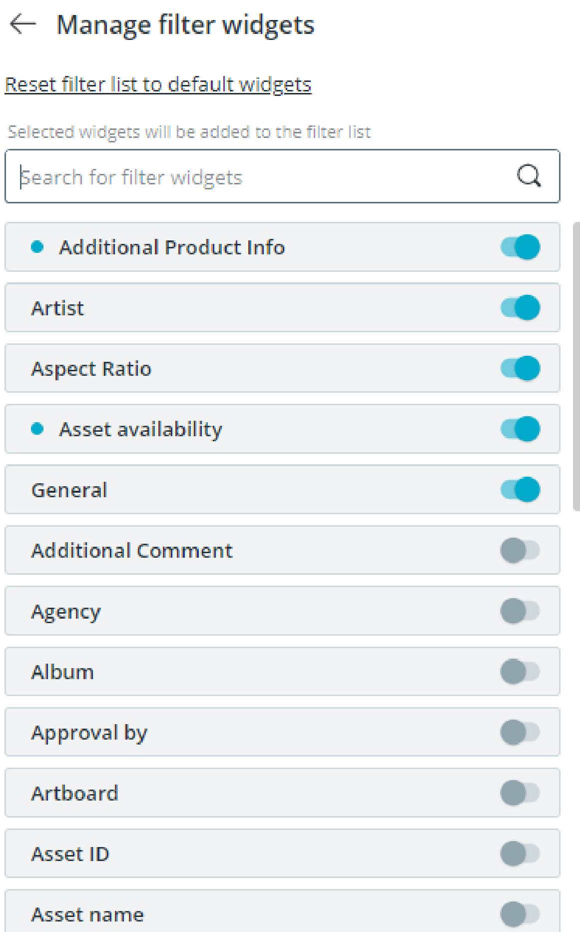
In addition to searching for objects by any metadata with the **full text search**, you can search by specific information fields or file properties using the **filter widgets**.

To select and activate a filter widget, follow the steps below:

1. In the search panel, click the 

button at the bottom of the panel to access all available filter widgets.

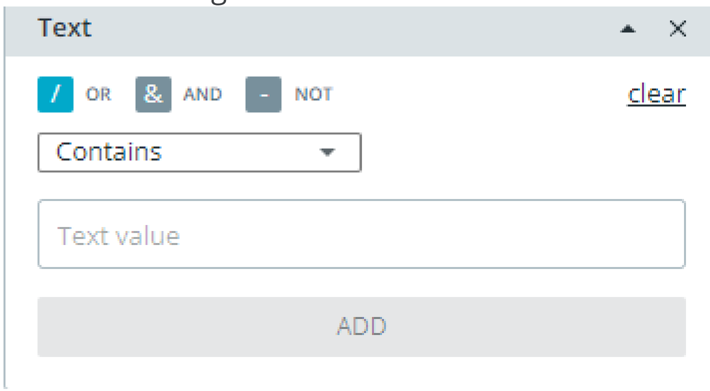
2. Select the ones you want to use by turning their toggle button to the "on" position:



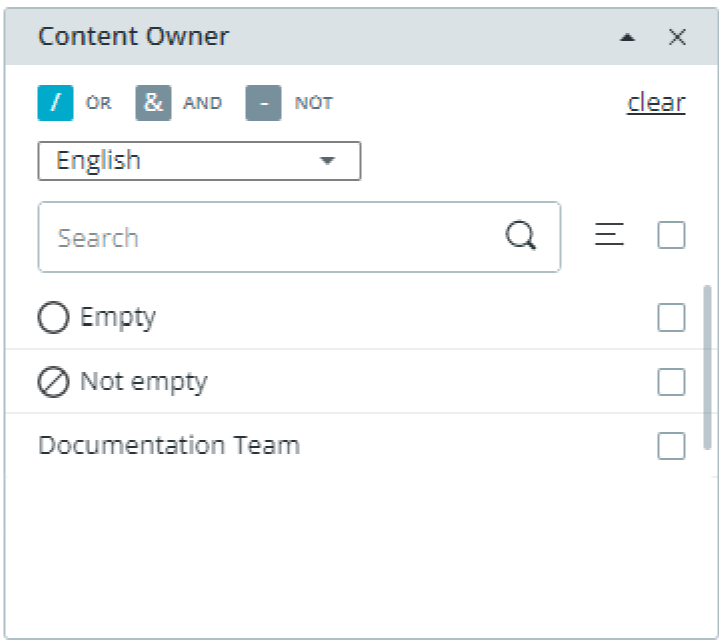
3. Click this button to return to the search panel and add criteria to your selected widgets:

4. In the search panel, expand each selected widget to add filter criteria and thereby activate the widget.
5. Depending on which type of information field the filter widget represents, add search criteria in different ways:

- For number, localized, or non-localized text or text area fields, enter a search term in the widget's search field and click "Add":



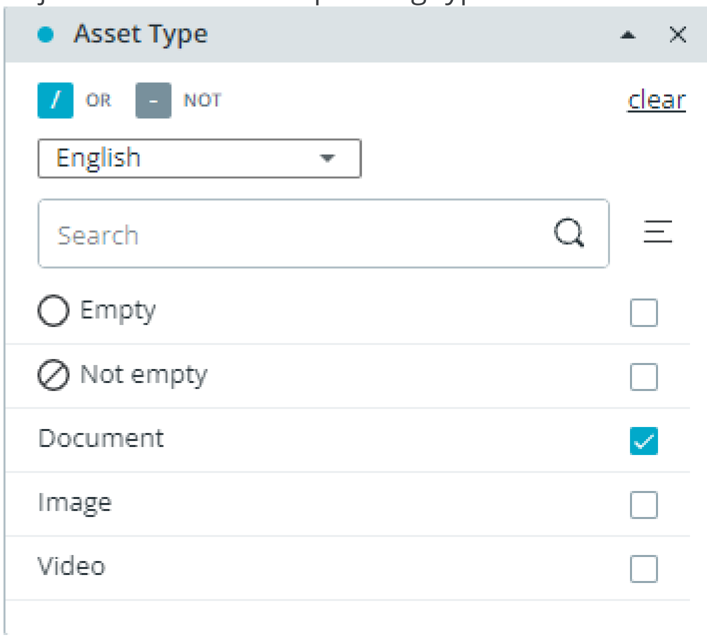
- For drop-down and referencing fields, check one or multiple options to search for them:



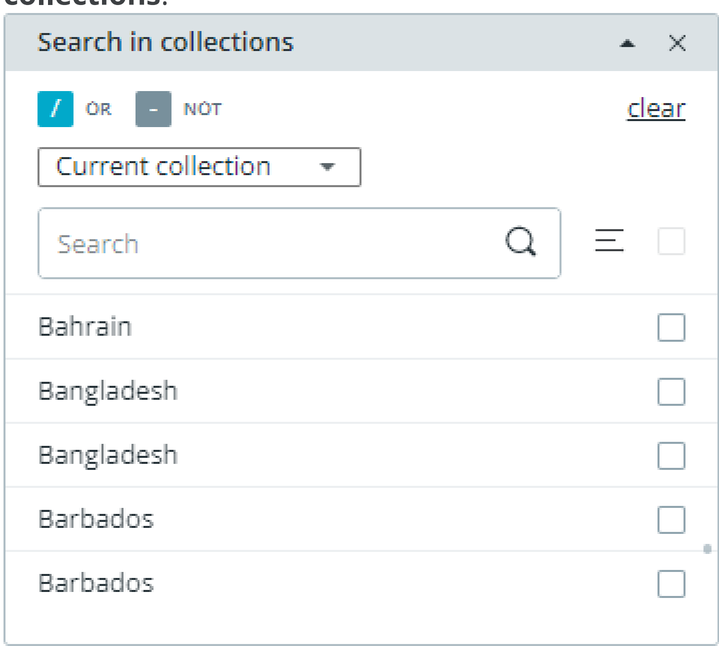
You can use the **"Search" field** to narrow down the options you can see, or **select all** available options. If more than 200 options are available, the "Select all" checkbox is disabled.

Additionally, you can open a **collection picker** with all available collections with the ☰ button next to the search field. The collection picker makes it easier to pick the right collections by showing the collections within their larger hierarchy.

- For asset or collection types, check one or multiple options to search for objects with the corresponding type:



- In the special widget "Search in collections", check one or multiple collections to search for assets linked to those collections. You can also choose between searching **in the current collections** or **in the current and all their child collections**:



You can select a maximum of 1000 collections from the list. If you select more than 1000, the widget won't return results anymore. Only explicitly selected collections are counted.

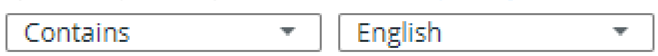
You can use the **"Search" field** to narrow down the options you can see, or **select all** available options. If more than 200 options are available, the "Select all" checkbox is disabled.

Additionally, you can open a **collection picker** with all available collections with the ☰ button next to the search field. The collection picker makes it easier to pick the right collections by showing the collections within their larger hierarchy.

6. Optionally change the **criteria combination** for each individual widget. Use "OR" to look for any of the chosen criteria, "AND" to look for all and "NOT" to exclude the chosen criteria from the search.

The default criteria combination is "OR", so objects which match any of the chosen criteria will be returned.

7. Optionally change the **filter widget options** for each filter widget:



8. The filter for each widget is applied. In the filter bar, you can see the applied filters. In the result list, you can switch between viewing asset or collection results:

If you are currently viewing the search results for assets, but have active filter widgets that cannot be applied to assets, such as "Collection ID", these filter widgets will be shown as inactive in the search panel and filter bar. The same is valid for asset-only widgets while in collection result list. When hovering over the inactive widget, a "widget disabled" message will appear.

9. The found assets are sorted by the "**Relevance**" column in the result list. You can find information on how the relevance is calculated **below**.

The "Relevance" column is only available in the "Assets" tab of the result list, not in the "Collections" tab.

Filter widget options

Depending on what type of information field it represents, a filter widget offers multiple field selection options:

- **Check box fields**: For check box fields, you can choose whether the check box should be checked or not:

- **Date fields**: For date fields, you can pick the following options (*Single value* is the default):
- **Number fields**: For number fields, you can pick the following options (*Single value* is the default):
- **Referencing fields** and **localized fields**: For collection-referencing fields, you can pick the language in which the search term should be matched:

Default value of the language chooser

The default value of the language chooser is set by a power-user in the **Content administration**. It can either be set to the current application language, or to a specific, fixed language.

If the chosen language is not available for the field that is being searched, then the default will either fall back to your chosen application language or the application's default language.

- **Single- and multi-line text fields**: For text fields, you can pick the following options (*Contains* is the default):

Calculation of the search relevance

The relevance is calculated depending on how often and in which type of metadata the search term is found. If the search term(s) are found in the asset name, original file name, or collection name, the result will be ranked highest, followed by information fields, parent collection paths and finally file properties. If the search term(s) are found in a combination of these metadata for the same object, the relevance accumulates.

A practical example

You're searching for the term "red". In the current collection, there are 4 assets:

- "Red car" has the search term in its asset name and original file name.
- "Car 1" has the search term in its original file name and its "Description" information field (in 2 languages).
- "Silver car with red upholstery" has the search term in its asset name and in its "Interior Description" information field (in 1 language).
- "Black car" has the search term in 3 different information fields.

The result will list the "Red car" asset at the top, because the search term is in 2 top-ranked fields. The "Car 1" asset will come in second, because it has the search term in 1 top-ranked field and 1 information field in 2 languages. The "Silver car with red upholstery" asset will come in third, because, while it also has the search term in 1 top-ranked field and 1 information field, it has it in 1 language. "Black car" is in last position because it doesn't have the search term in any top-ranking fields, but just in information fields, which are ranked lower.

The rank calculation changes if you deselect a specific type of metadata or language from the **search options**. Results may therefore be sorted differently on subsequent searches.

Change the filter combination

In the search panel, the **filter combination** menu allows you to change how active filter widgets work together to return matching objects:

- **AND combination**: The search returns all results that match ALL filter widgets' search criteria.
- **OR combination**: The search returns all results that match ANY filter widgets' search criteria.

Results depend on filter combination and individual widgets' criteria combination

The search results are determined by both the global filter combination AND each individual filter widget's criteria combination (when you search for multiple values in a widget). A filter widget's results depend largely on whether the underlying information field allows single or multiple values.

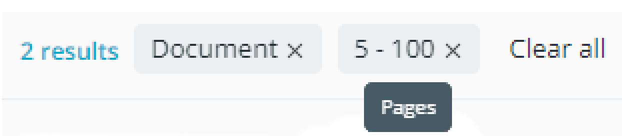
A practical example

You have some pictures of furniture in your system. These assets can have multiple values in their "Material" field, but only one value in their "Product Category" field. You want to search for the Material "Wood" and you want to search in the Product Categories "Chairs" and "Tables". Depending on the filter and criteria combination, the results differ:

- **Filter combination is "OR" and Product Category's criteria combination is "OR"**: Here, you look for all assets which are either made of wood OR which are either chairs or tables. The search returns all wooden furniture (regardless of Product Category) as well as all chairs and all tables (regardless of Material).
- **Filter combination is "OR" and Product Category's criteria combination is "AND"**: Here, you look for all assets which are made of wood OR which are both chairs and tables. The search returns all wooden furniture (regardless of Product Category), because no assets are both chairs and tables.
- **Filter combination is "AND" and Product Category's criteria combination is "OR"**: Here, you look for all assets which are made of wood AND are either chairs or tables. The search returns all wooden chairs and all wooden tables.
- **Filter combination is "AND" and Product Category's criteria combination is "AND"**: Here, you look for all assets which are made of wood AND are both chairs and tables. The search returns no results, because no assets are both chairs and tables (regardless of Material).

See active filter criteria and widgets

In the filter bar, you can see all applied filter criteria as little **filter chips**. On mouse-over, you'll see the filter widget they belong to:



In the above example, the "Document" criterion for the "General" filter widget and the "5 - 100" criterion for the "Pages" filter widget are applied.

To directly open an active filter widget in the search panel, click on a filter chip in the filter bar. The widget will be expanded and ready for editing.

Clear your search

Deactivate the active widgets and criteria:

- **In the filter bar –** Click on an individual filter chip's **x button** on the right side to remove that criterion, or click "Clear all" to remove all applied criteria. These actions will reset the search, but the selected filter widgets will still remain in the search panel.

- **In the search panel** – Click on the filter widget's **x button** to remove a single widget from the selected widgets list, or expand a widget and click "clear" if you want to reset the search criteria, but still have the widget in the search panel.

Deselect all filter widgets:

1. Click the "Manage widgets" button at the bottom of the search panel.
2. Click on "Reset filter list to default widgets".
3. All widgets, except the ones configured as default, get deselected and removed from the list of selected widgets.

> You can also deselect the default filter widgets, if you have them configured, by clicking the **x button** next to their name.

Clear the full text search:

To clear the full text search you need to either use the ✕ icon in the search chip or use the "Clear all" button. Note that "Clear all" will also remove all active criteria from other filter widgets.

Leave the Advanced Search

To exit the Advanced Search, simply click one of the other system bar buttons to go to the Dashboard or Explore View.

When you leave the Advanced Search, you will see your previous view. Your Advanced Search configuration (active search widgets and criteria) will be saved until the next time you open the Advanced Search, so you can continue where you left off.

Any search terms you entered into the full text search before leaving will still be present in the full text search field on the page you navigated to (either Dashboard or Explore View).

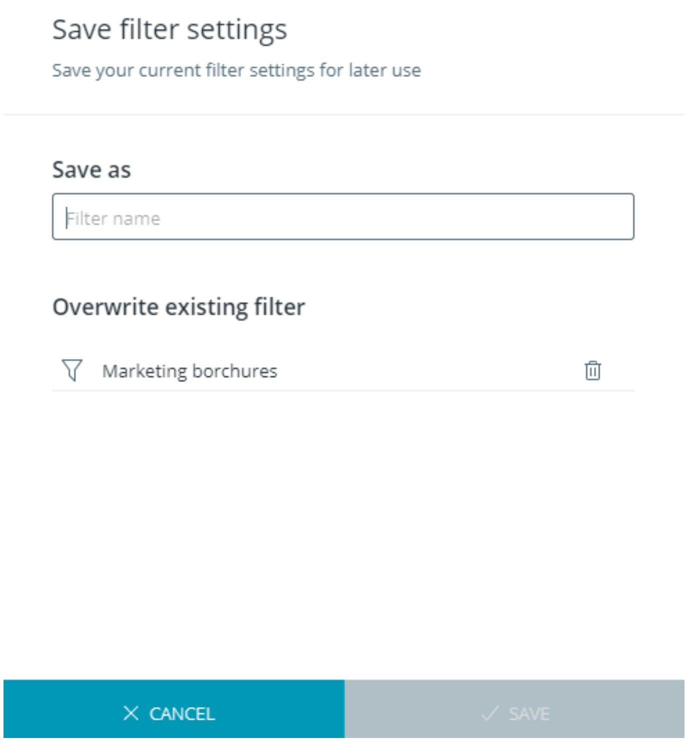
> **Repeated searches**
>
> If you repeatedly search for objects by the same criteria, you can **save your current filters** and reuse them later.

Save and load searches

If you want to repeatedly search for assets with the same set of metadata, or have multiple different searches which you execute regularly, then CELUM Content's search saving and loading functionality in the Advanced Search is for you. Additionally, you can share a saved search configuration with other users.

Save a search

1. After you have chosen some filter widgets and **activated them by adding criteria**, open the search panel.
2. Click the  button at the bottom of the search panel.
3. A new dialog opens:

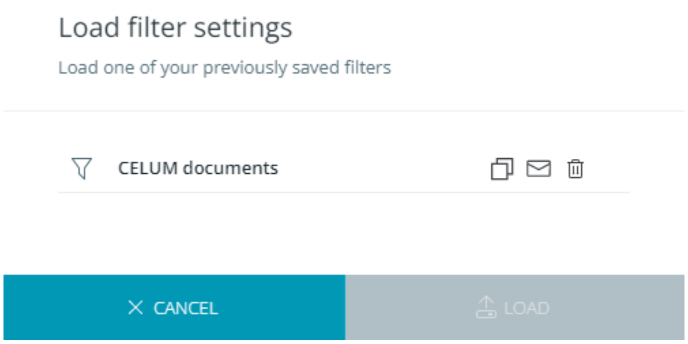


4. Enter a name or select an existing filter to overwrite it.
5. Click "Save" to save the filter under a new name or "Overwrite" to save it under the existing filter's name.

Load a search

1. Open the search panel.

2. Click the button at the bottom of the search panel.
3. A new dialog opens and shows all your saved filters:



You can only see saved filters which you saved yourself. Other users' filters are not visible.

Hover your mouse cursor over a saved filter to see if it is used in any **Libraries**.

4. Select the filter you want to load and click "Load" to proceed.
5. The loaded filter widgets and filter criteria are immediately applied to the result list.

Delete a saved search

1. Open the search panel.
2. Click on the button at the bottom of the search panel.
3. A new dialog opens.
4. Click the delete button next to a filter's name to delete it.

If the filter is used in a Library, you will see a warning dialog upon deletion.

After deletion of such a filter, any Library that uses it (and all Portals that use the Library) will no longer get any new assets from CELUM Content.

Share a saved search

You can share your saved search configurations (including search terms, active widgets, criteria and sorting of results) with other users in the "Load filter settings" dialog:

1. Open the search panel.

2. Click the button at the bottom of the search panel to open the "Load filter settings" dialog. As described in "**Load a search**", the dialog shows all the search configurations that you have saved before.
3. You can share a link to the saved search in two ways:
   - Click the "Copy to clipboard" icon to copy the link and insert it wherever you want.
   - Click the "Send via e-mail" icon to insert the link into a new e-mail.
4. Send the link to the people with whom you want to share the saved search configuration.

Recipients need to have an active CELUM Content user to log in with, and also need to be able to access the Nova UI.

Search configuration depends on user permissions and status

When the recipient opens the link, the search is immediately executed using the recipient's permissions. If the recipient does not have permissions to see any of the active widgets (respectively, their underlying metadata fields), an error message is shown and the search can't be executed. Instead, the recipient will see their own previous search configuration.

Additionally, the results for the shared search configuration also depend on the recipient's permissions on specific collections and assets. Therefore, the recipient may get different search results than you for the same search configuration.

Lastly, if the sharing user (who created the shared search configuration) is deleted or deletes the saved search, the recipient won't be able to open the link anymore.

Share the current search configuration

You can share your current search configuration (including search terms, active widgets, criteria and sorting of results) with other users via the "Share" button at the bottom of the search panel.

The button opens a new dialog where you can choose between copying the link to the search configuration to your clipboard and sending it via e-mail.

Recipients need to have an active CELUM Content user to log in with, and also need to be able to access the Nova UI.

Search configuration depends on user permissions and status

When the recipient opens the link, the search is immediately executed using the recipient's permissions. If the recipient does not have permissions to see any of the active widgets (respectively, their underlying metadata fields), an error message is shown and the search can't be executed. Instead, the recipient will see their own previous search configuration.

Additionally, the results for the shared search configuration also depend on the recipient's permissions on specific collections and assets. Therefore, the recipient may get different search results than you for the same search configuration.

Lastly, if the sharing user (who created the shared search configuration) is deleted or deletes the saved search, the recipient won't be able to open the link anymore.

Rename a saved search

You can rename your saved search configurations in both the "Save filter settings" and "Load filter settings" dialog if the initially chosen name no longer reflects what the saved configuration represents.

1. Hover your cursor over a saved configuration. A small "Edit" icon appears.
2. Click on the "Edit" icon.
3. Enter a new name.
4. Click the "Save" icon or press ENTER on your keyboard.

This feature is especially useful when the saved search in question is used in a Library.

Advanced UI

How CELUM Content works

How CELUM Content works

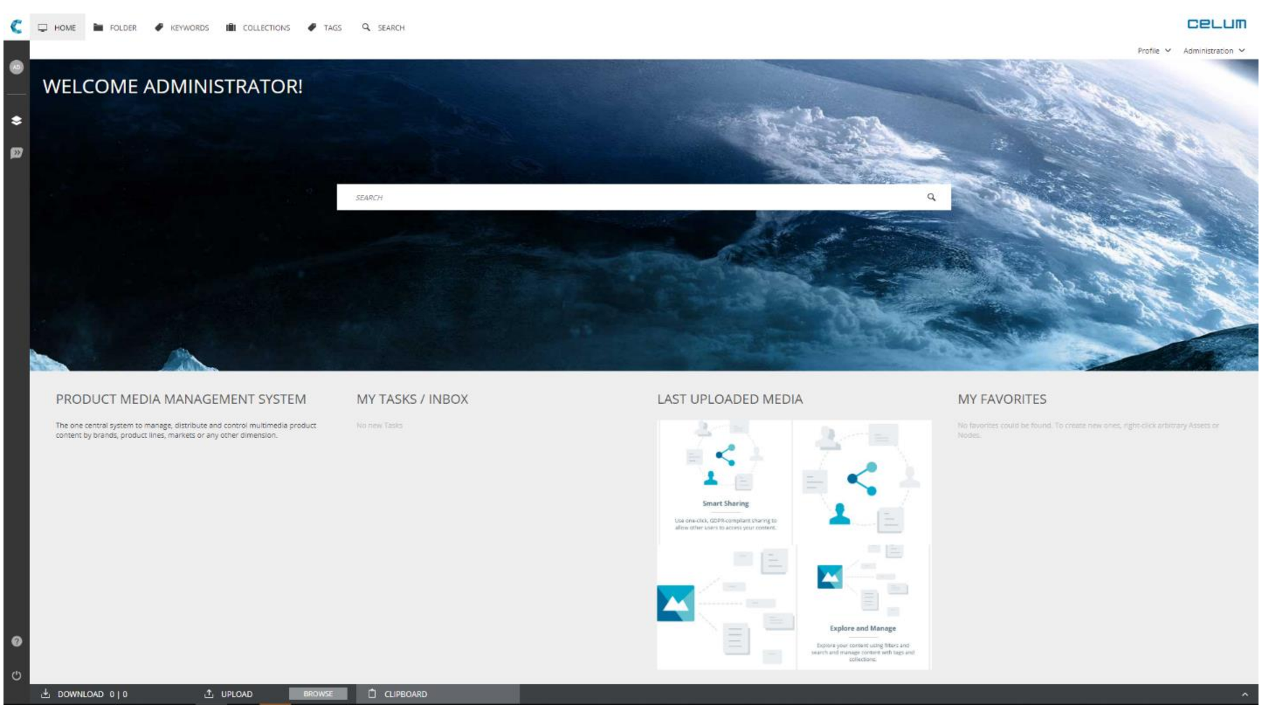
Welcome to the exciting world of CELUM Content!

With the CELUM Cloud suite of web-applications, you and your team can create, manage and route your marketing content to create engaging product stories and content experiences. CELUM Content is responsible for the "Manage" part of the content journey

In this topic, you will learn how to get started with the "Advanced UI" of the CELUM Content application..

First steps in the Advanced UI

After you log in to the Advanced UI for the first time, your entry point is the **"Home" tab.** The "Home" tab contains useful widgets for quick access to objects like your favorite assets and nodes or your last uploaded assets, as well as a central search box so you can start browsing for assets immediately.



Additionally, you can navigate through the different areas of the application to access either specific structure types or specific functionality. The separate areas of CELUM Content are called "**main view tabs**" and are located in the header bar of the application. Simply click on a tab to enter it.

The available main view tabs depend on your server's configuration as well as your permissions, but by default, the following tabs are available:

- **Home**: The "Home" tab is your central dashboard, containing useful widgets for quick access to objects, and a search field for instant exploration.
- **Folder**: "Folders" are one of the default node types and allow you to organize your assets.
- **Keywords**: "Keywords" are one of the default node types and allow you to organize your assets.
- **Collections**: "Collections" are one of the default node types and allow you to organize your assets.
- **Tags**: "Tags" are one of the default node types and allow you to organize your assets.

Different behavior for the "Tags" The main view tab

Like the other main view tabs, this tab is only visible to users who have the "View" permission for the tab.

However, when you are able to see the "Tags" main view tab, you are also able to see and edit all existing nodes inside the tab. Permissions have no effect on tags, so you can move, edit or delete all tags in the "Tags" main view tab if you can see the tab.

- **Search:** In the "Search" tab, you can refine your search results with different widgets to search for assets by different aspects.

If you cannot see any main view tabs, it means you do not have permission to see them. Please contact a power user who can give you the permissions.

What are assets?

Assets are the main pieces of content that you work with in CELUM Content. An "asset" is a piece of "upsmarted" marketing or product content (e.g. an image, document or video) inside CELUM Content that

- consists of a binary (file), usage control and metadata,
- has an asset type that determines its metadata,
- is organized in nodes, and
- can have multiple versions (binaries) attached to it.

In short, an asset is the representation of a digital file in CELUM Content. Assets are created when you upload files to CELUM Content. They always have an asset type which determines their metadata, and they can be downloaded again in different formats as well as distributed to connected systems.

Asset types and what they do

An asset type determines which **information fields** each asset in CELUM Content can have. Asset types are configured according to the needs of your organization. This includes field sets as well as the information fields themselves.

In the application, you choose an asset type for each file that you upload, thereby transforming it into a full-fledged asset that you can categorize with metadata.

What are nodes?

Nodes in CELUM Content are the equivalent of a folder or directory in your local file system. A "node" is an "upsmarted" folder that

- provides usage control and metadata,
- has a node type that determines its metadata,
- is organized in hierarchy of other nodes, and
- can contain multiple assets and other nodes.

In short, nodes are the main organizational units in CELUM Content. You assign assets to nodes in order to structure them. Each node can also have an icon and metadata of its own. Its metadata is determined by its node type.

Node types and what they do

A node type determines which **information fields** a node in CELUM Content can have. Node types are configured according to the needs of your organization. This includes field sets as well as the information fields themselves.

In the application, you create a node in the respective **main view tab** that is associated with a specific node type. The new node then automatically has that type and you can edit its metadata.

What are metadata?

Metadata are all information that describe an asset or a node in CELUM Content.

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

The metadata of nodes consist of the following aspects:

- **Information fields**: Just like for assets, the information fields for nodes are configured by a system administrator.
- **Node properties**: These are automatically assigned to the node during creation. Examples include the name, icon or validation level.

Information fields always depend on the **asset type** (for assets) or **node type** (for nodes). By assigning a type, the information fields become available for the object.

Types of metadata fields

Each information field for assets or nodes also has a specific type which restricts data types you can enter. CELUM Content provides fields of the following types:

- **Check box field**: You can enable or disable a check box field in order to give it a value of "yes" or "no". An out-of-the-box example for a check box field is the "Copyright required" field.
- **Date field**: A date field allows you to either enter a date in a specific format or choose a date from an intuitive date picker. An out-of-the-box example for a date field is the "License expires" field.

If you enter a date manually, the format depends on your current application language. For example, if you are viewing CELUM Content in **English**, the format is *MM/DD/YYYY*. If you are viewing CELUM Content in **German**, the format is *DD.MM.YYYY*.

- **Drop-down field**: A drop-down field allows you to choose a single option from a list. An out-of-the-box example for a drop-down field is the "Asset Availability" field.
- **Node-referencing field**: A node-referencing field is a special form of drop-down, which allows you to choose one or multiple **nodes** (usually of the "Keyword" type) from the list in order to categorize an asset. An out-of-the-box example for a node-referencing field is the "Author" field, which references a keyword "Persons" and allows you to choose any sub-node of the referenced keyword.
- **Number field**: A number field allows you to enter a single number. Depending on the field's sub-type, you can either enter an integer number or a decimal number.
- **Text field**: A text field allows you to enter a single line of text. A text field can also be localized, which allows you to enter the text in multiple languages. An out-of-the-box example for a text field is the "Name" field.
- **Text area**: A text area allows you to enter multiple lines of text in the same field. A text area can also be localized, which allows you to enter the text in multiple languages. An out-of-the-box example for a localized text area is the "Content description" field.

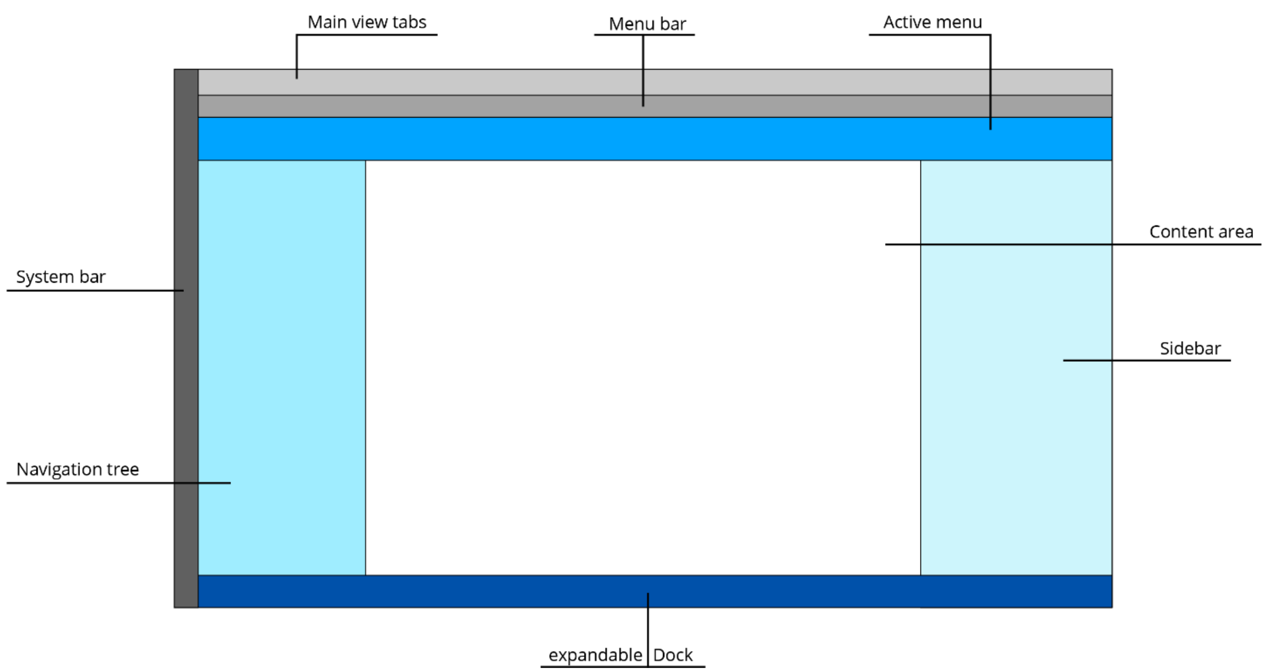
The CELUM Content user interface

CELUM Content offers an intuitive, easy-to-use application interface where you can easily navigate between different content types and functions. The user interface is also called "**main view**".

Overview of the application areas

CELUM Content's application interface consists of multiple high-level **main view tabs**, where each main view tab represents a specific structure type or a specific functionality, such as the search.

Each main view tab has the same layout and components:



- The **main view tabs** at the very top of the browser window let you jump between different node types or functional areas of CELUM Content.

> If you cannot see any main view tabs, it means you do not have permission to see them. Please contact a power user who can give you the permissions.

- The **menu bar** below the main view tabs contains the breadcrumbs (parent path of the currently selected object) on the left side and various menus and the quick search box on the right side.
- The **active menu** below the menu bar contains the most important actions for the current context, for example for a selected asset, node, or task.

- The **content area** in the center of the browser window shows you the items within the currently selected main view tab. For example, it shows the asset list for a node type tab, or other information for another main view tab type.
- The **sidebar** on the right side of the browser window lists the most important information for the current context, for example for a selected asset or node. The sidebar can be expanded to the **detail view** for more information about an **asset** or **node**.
- The **dock** at the bottom of the browser window contains the options for uploading, downloading, or moving assets and nodes in the system. The dock is expandable and collapsible.
- In the **navigation tree** on the left side of the browser window, you can navigate through content within the currently selected main view tab. For example, it shows a hierarchical node tree for a node type tab, or a list of media platforms in the Backstage tab.
- The **system bar** on the left side of the browser window contains the help and logout buttons (at the bottom), your user avatar (which opens your Profile dialog), and connection buttons to other products in the CELUM Cloud.

The "Home" main view tab consists only of the main view tabs, content area, dock, and system bar. The content area shows a central search field and some handy widgets. These widgets help you quickly access your favorites, your recently uploaded assets, or your active tasks.

Refresh an application area

Refresh the following areas of the main view with the small ⟳ icon:

- **Navigation tree**: The icon is located next to the Lookup field on top of the area.
- **Asset list (content area)**: The icon is located in a toolbar at the bottom of the area.
- **Dock**: The icon is located in a toolbar at the bottom of the area.

Refresh the active menu by selecting a different object. The actions in the active menu change accordingly.

Get information about the system

You can find information about your CELUM Content server's version, the support contact for the server and installed product extensions in the "About" dialog. Access the "About" dialog by clicking the "About CELUM Content" icon ? in the system bar.

Execute actions on objects

Available actions in CELUM Content are **context-sensitive**. This means they are determined by the following aspects:

- Your current location within the application,
- your permissions within the application

There are two places which list a current object's available actions: The **active menu** and the **context menu**. Right-click an object to open its context menu. Click on an action to execute it.

Execute actions on multiple assets

The multi-selection of assets works concurrently to selection of files in your local file system:

- **Select multiple separate assets**: Press and hold the **Ctrl** (Windows) or **Cmd** (macOS) button on your keyboard.
- **Select a range of assets**: On Windows, select an asset, hold the **Shift** button on your keyboard and click another asset. On macOS, hold the **Shift** button your your keyword and draw a **selection box** with your mouse.
- **Select all loaded assets**: Press **Strg+a** (Windows) or **Cmd+a** (macOS) on your keyboard to select all currently loaded assets on the current page of the asset list at once.

Assets in CELUM Content are **loaded in multiple pages**. Therefore, only the assets on the current page are selected this way.

Switch to Nova UI

If Nova UI is activated for your CELUM Content, you can easily access it:

1. Go to the menu bar.
2. On the right side of the menu bar, click the "Nova UI" button to access it.

Online help for Nova UI

To find help on how to navigate and use the Nova UI, please switch over to the **Nova UI section of the online help**.

Further adjustments necessary?

- Change the asset list columns
- Change the whole user interface appearance
- Change the application language

The CELUM Content permission system

CELUM Content's permission system is based on three simple principles:

1. Permissions control both global access to specific functions and local access to specific nodes/assets for any given user or user group. **Global permissions** are assigned directly to a user or user group. **Local permissions** are defined in "**Roles**" which are assigned to a specific user or group on a specific node.

A concrete example for local and global permissions

A user has the global permission to upload assets. However, the user was not granted the local permission to add assets on any nodes in the system. Therefore, the user can upload assets, but can never make these assets visible to other users because they can't be added to any nodes.

2. There are two kinds of nodes in CELUM Content with regard to permissions: **Permission-defining nodes** define local permissions for themselves and also for all assets within. **Non-permission-defining nodes** only define local permissions for themselves. Assets in non-permission-defining nodes are unaffected by their parent node's permissions.

A concrete example for this principle

An asset is assigned to two nodes "A" and "B". Node "A" is a *non-permission-defining* node. Local permissions allow a user to manage versions for assets within the node. Node "B" is a *permission-defining* node. Local permissions do not allow the user to manage versions for assets within the node. Only the permissions on node "B" are applied to the asset, so the user can't manage the versions for the asset.

3. Permissions are **additive**, which means that a permission granted to a user on a specific function or object cannot be withdrawn on the same object or function with a different permission set.

Concrete examples for additive permissions

A user has the global permission to upload assets to the system. The user then gets added to a user group which does not have the global permission to upload assets. The user can still upload assets regardless of the parent group's missing permission.

An asset is assigned to two permission-defining nodes "A" and "B". On node "A", a user has the local permission to manage versions for assets within the node. On node "B", the same user does not have the permission to manage versions for assets within. The user can still manage the asset's versions, even though the permission is not granted on all of the asset's permission-defining parent nodes.

These three principles for permissions allow CELUM Content to represent your organization's real-world employee hierarchy and privileges in a highly granular and efficient way.

General user types

In the CELUM Content help, users with different permission levels are simplified in **four types** who have access to different functions:

- **Read-only**: A read-only user can only have the most limited set of global user permissions. Read-only users can never upload, create, move, or edit assets or nodes and their metadata, independent of their local role permissions.
- **Editor**: An editor user can have a more extensive set of global user permissions. The only global permissions which cannot be granted to editor users are administrative permissions, like user, system task, or content type permission management.
- **Administrator**: An administrator can do almost anything within the system, including uploading, moving, and editing assets and nodes or their metadata. All role-based permissions take effect for administrators.
- **Super-Administrator**: A super-administrator is an administrator with the additional "Super-Administrator" global user permission. This permission automatically grants all other global permissions and allows a super-administrator to see, download, edit, move, and delete all nodes and assets in the system, independent of the local role-based permissions.

Which global permissions are there?

Global permissions manage access to global functions which are only assigned to the user and are not tied to any specific object.

- **Upload assets**: Allows you to upload assets or asset versions to the system.
- **Manage Content Type Permissions**: Allows you to set "View" and "Use" permissions for node types.

- **View expired assets**: Allows you to view assets whose validity date has expired.
- **Edit expired assets**: Allows you to edit metadata of assets whose validity date has expired.
- **Download expired assets**: Allows you to download assets whose validity date has expired.
- **Administer PINs from other users**: Allows you to edit PIN Links from other users.
- **Upload assets**: Allows you to upload assets or asset versions to the system.

- **View expired assets**: Allows you to view assets whose validity date has expired.
- **Edit expired assets**: Allows you to edit metadata of assets whose validity date has expired.
- **Download expired assets**: Allows you to download assets whose validity date has expired.
- **Administer PINs from other users**: Allows you to edit PIN Links from other users.

- **Manage System Tasks**: Allows you to execute system tasks, for example for system cleanup or asset imports.
- **Change Password**: Allows you to change your own user password.
- **Users and User Groups**: Allows you to add, restructure, or remove users and user groups.
- **Super-Administrator**: Allows you to access every feature in the system and override local permissions on nodes.
- **Manage Content Type Permissions**: Allows you to set "View" and "Use" permissions for node types.

- **Manage System Tasks**: Allows you to execute system tasks, for example for system cleanup or asset imports.
- **Change Password**: Allows you to change your own user password.
- **Users and User Groups**: Allows you to add, restructure, or remove users and user groups.
- **Super-Administrator**: Allows you to access every feature in the system and override local permissions on nodes.

Not all of these global permissions can be set for every user. CELUM Content users have specific technical types. These technical types automatically restrict some of the global permissions. Find out how the technical user type influences the global permissions in the Administrator Guide in the **Customer Knowledge Base**.

Content type permissions

A special case of global permissions are content type permissions, i.e. the permission to view or use a specific **main view tab** (both for node types and for other functions) or **asset type**. These permissions are tied to the specific asset type or main view tab and assigned to users.

Main view tab permissions are not granted by default

Users can't see any of the main view tabs in the application by default. A power user must explicitly grant them the permissions for each main view tab that they want to see.

Which local role-based permissions are there?

Roles only manage access to actions which users can execute on specific objects in the system. They are tied to a specific object and assigned to users on each object.

For **nodes**, any role can define access to the following actions:

- **View**: The ability to view a specific node and/or its sub-nodes.
- **Manage Role Assignment**: The ability to assign roles to users on a specific node.
- **Add/Delete/Move node**: The ability to add, delete, or move the current node and/or its sub-nodes.
- **Add/Delete/Move asset**: The ability to add, delete, or move assets to or from the current node and/or its sub-nodes.

For **assets within permission-defining nodes**, any role can define access to the following actions:

- **View**: The ability to view an asset.
- **Versions**: The ability to manage or add asset versions.
- **Security Context**: The ability to add an asset to another node with different local permissions.
- **PIN**: The ability to create, update, or delete PIN Links on the asset.
- The ability to edit the asset's **name** and **availability**.

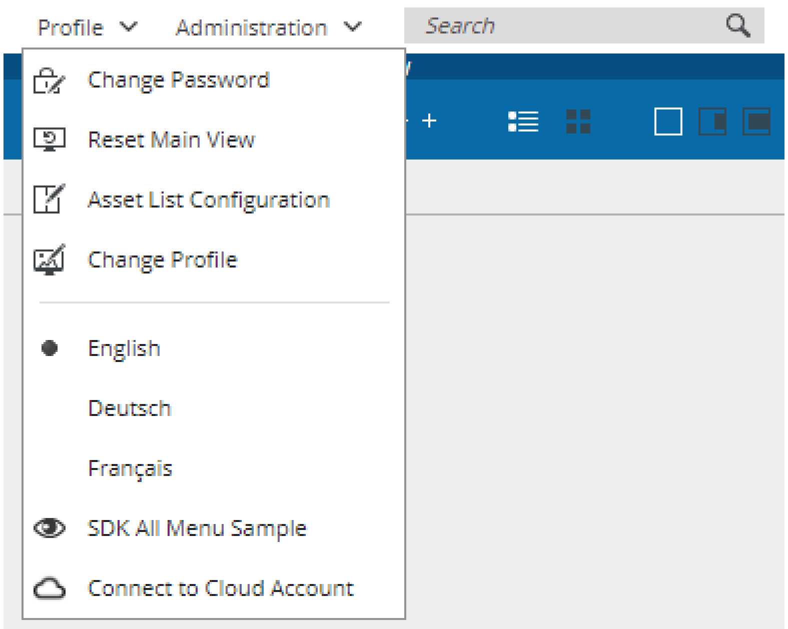
- **Use in Information Fields**: The ability to reference the current node in node-referencing information fields.
- **Manage Own PIN**: The ability to create, update, or delete PIN Links on the current node and/or its sub-nodes.
- The ability to edit the node's **name**, **validation level**, and **icon**.
- The ability to edit the node's **metadata**, down to field level.
- The ability to edit the asset's **metadata**, down to field level.
- **Download Formats**: The ability to download a given asset in a specific download format.
- **Original Download**: The ability to download an asset of a specific file type in its original format. You can restrict the original download to specific file extensions.

Want to restrict permissions yourself? The Administrator Guide in the **Customer Knowledge Base** contains instructions.

Configure your user settings

Configure your user settings

Your user settings enable you to make permanent adjustments to certain settings of CELUM Content. You can reach them via the "Profile" button in the menu bar:



Reset the user interface

You can restore the user interface to its standard state. This feature can be useful to restore a cluttered asset list to a more comprehensive view or to restore the standard size for previews, column widths, or the sidebar.

1. Open the "Profile" menu located below the main view tabs on the right side of the browser window.
2. Click "Reset Main View".
3. The user interface reloads and gets restored to its default state.

Change your password

The "Change password" entry is only visible if you have the global "Change password" permission.

1. Open the "Profile" menu in the menu bar.
2. Click "Change Password".
3. A new dialog opens.
4. Enter your current password in the first field and a new password in the two remaining fields.

Below the input fields, the configured password policy criteria are listed. These requirements for a valid password are configured by your CELUM Content server's technical administrator and are subject to change.

Change the application language

Change the application language either via the **Profile menu** in the menu bar or via the **Profile dialog** in the system bar.

Change the language via the profile menu

1. Open the Profile menu ("Profile").
2. The available user interface languages are displayed in the drop-down menu. The current language is marked by a dot:

3. Choose another language.
4. The Profile menu closes and the application is reloaded in the new language.

The chosen language is retained and will always be applied, even if you log out and log in again.

Change the language via the profile dialog

1. Click on your avatar in the system bar. Your Profile dialog opens.
2. The current language is displayed in the dialog as the current value of a drop-down field.
3. Click on the drop-down field.
4. Choose another language.
5. The Profile dialog closes and the application is reloaded in the new language.

The chosen language is retained and will always be applied, even if you log out or log in again.

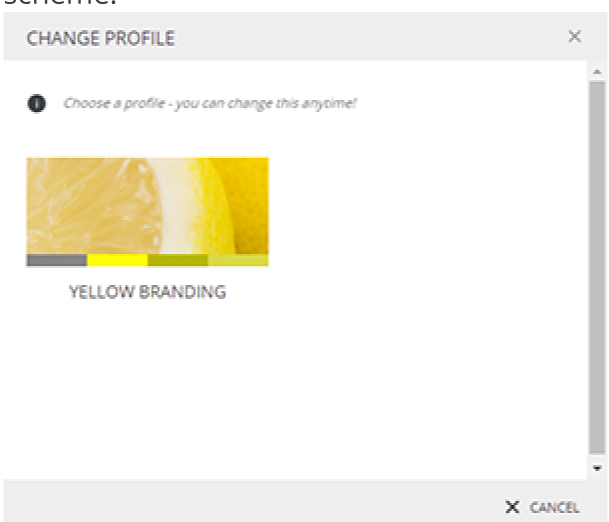
Change the application appearance

CELUM Content allows your system administrator to define multiple **user interface brandings** in order to give the CELUM Content application a distinctive appearance. This includes background and font colors for the various user interface areas, as well as a custom logo.

Switch the branding profile

If there are multiple branding profiles (besides the default CELUM appearance) defined on your server, you can activate them via the Profile menu:

1. Open the Profile menu.
2. Click the "Change Profile" menu entry.
3. A dialog lists all available profiles as previews with the logo and dominant color scheme:



4. Click a profile's preview to activate the profile.
5. The application is reloaded in the new color scheme.

If no branding profiles are configured, you cannot see the "Change Profile" menu entry.

Want to configure your own branding profile? In the Administrator Guide in the **Customer Knowledge Base**, you'll find instructions.

Choose the asset list columns

You can change completely which columns the asset list should display:

1. Open the Profile menu ("Profile").
2. Click the "Asset List Configuration" menu entry. The "Configure Asset List" dialog opens.
3. In the dialog, available columns are displayed in three categories:
    - **Information Fields**: Lists all information fields in the system.
    - **File Information**: Lists different metadata which CELUM Content retrieved from different asset types.
    - **Default**: The default asset list columns.
4. Select or deselect the check box next to each column name to add or remove each column.
5. Confirm the dialog with "Finish".

Due to space restrictions, you can select a maximum of 15 columns.

Connect to the CELUM Cloud services

Manual connection may not be necessary

From Release 24.7 on, the automatic "User Management via Cloud (UMC)" integration can be enabled on your system to allow for seamless integration between the CELUM services and easy login into CELUM Content with your CELUM Cloud user.

If it is enabled, the "Connect to Cloud Account" menu entry in the user settings is no longer available and the instructions on this page are not needed.

You can connect your CELUM Content server to the services in the CELUM Cloud with the central **CELUM Cloud Account**. This allows you to **synchronize assets** to your local file system with **CELUM Drive**.

Prerequisites

In order to connect CELUM Content to the other CELUM services, you need a **personal user account in CELUM Cloud Account**, which allows you to connect to all CELUM services with only one central account. You can find information on how to **register** below.

If the "User Management via Cloud" is enabled on your CELUM Content system, you need to sign up via the **CELUM Cloud Account website**, complete the registration process there, and contact your company's organisation manager for access to the organisation account.

Register a CELUM Cloud Account user

You can get a CELUM Cloud user account by using the "**Connect to Cloud account**" function directly in CELUM Content. This will open the CELUM Cloud Account login page, where you can register a new user:

During the registration process, you automatically request membership in your company's organisation account in CELUM Cloud Account to gain access to the subscribed services. The organization managers for the organisation are automatically notified and will grant you access.

Alternative registration

Alternatively, you can also sign up via the **CELUM Cloud Account website** and complete the registration process. In that case, you may have to contact your company's organisation manager for access to the organisation account.

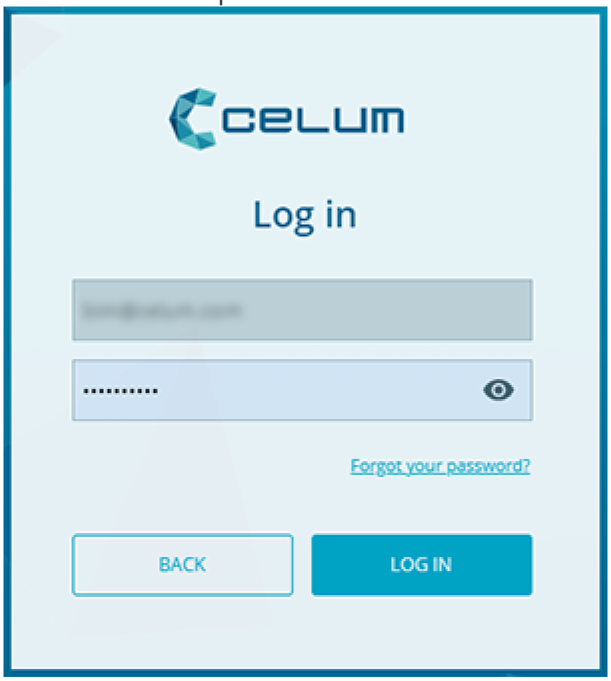
You can find more information about the registration process in the CELUM Cloud Account online help.

Connect CELUM Content to CELUM Cloud Account

Once you have registered a personal CELUM Cloud user account (and the organization manager has granted you access to the CELUM services), you can seamlessly connect your CELUM Content user to CELUM Cloud Account. After you have connected, you can **synchronize your CELUM Content assets with CELUM Drive**.

1. Click the "Connect to cloud account" menu entry in the profile menu.

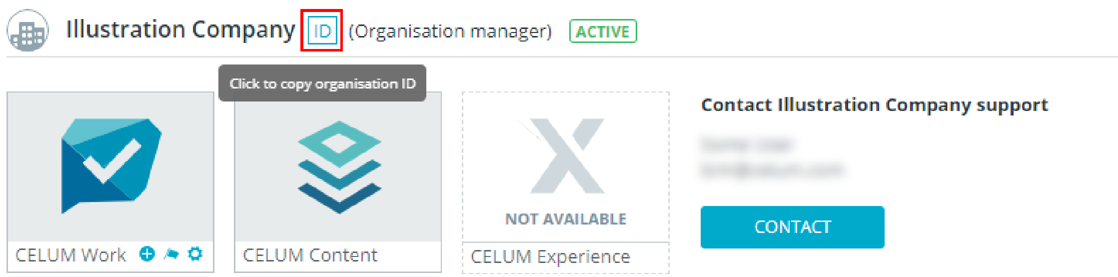
2. A new browser window opens in which you must enter your CELUM Cloud Account user name and password:



3. Click "Login" to get to the next step.
4. In the next step, enter the ID for the CELUM Cloud organization account that you want to connect to:

Get the organization ID from CELUM Cloud Account

To copy the organization ID, log into your CELUM Cloud Account and copy the ID directly on the "Home" tab:



5. Click "Connect". After you finish the process, you can use all the CELUM services which are subscribed and enabled for your organization.

Work with nodes

Work with nodes

In short, nodes are the main organizational units in CELUM Content. You assign assets to nodes in order to structure them. Each node can also have an icon and metadata of its own. Its metadata is determined by its node type.

A word about permissions

As already mentioned in **The CELUM Content permission system**, some nodes determine the permissions for all assets within them, while others don't. These two kinds are:

- **Permission-defining nodes** define local permissions for themselves and also for all assets within.
- **Non-permission-defining nodes** only define local permissions for themselves.

For both kinds of nodes, **role-based local permissions** can be set. For the former kind, the asset permissions defined in the role will be applied to the assets inside the node. For the latter kind, only the node role permissions will be applied to the node itself.

Validation level

The **validation level** describes the way in which the metadata of a node or the assets within are validated. There are two validation levels for nodes:

- **Strict:** You can only assign assets to a node with this validation level if all required asset information fields are filled. So, the assets must have an asset type and no empty required fields. Equally, you can only save a strict node if all required node information fields for the node are filled.
- **Tolerant** : The asset's metadata status doesn't matter for nodes with this validation level, you can even add assets without an asset type. Equally, you can save tolerant nodes with empty required information fields as well.

By default, the validation level is *inherited* from the current node's parent node.

Get more information

- **Create nodes**
- **View node information**
- **Edit node metadata**
- **Move nodes**

- Share nodes
- Synchronize with CELUM Drive

Create nodes

There are several ways to create new nodes in CELUM Content:

- **Manually** in the CELUM Content main view
- Via bulk **import**
- **Programmatically** via API

Create nodes in the user interface

You can create nodes of a specific type on each node type's main view tab in two ways:

- Click the "New <node type>" button in the active menu.
- Click the "Create" action in the context menu in the asset list or navigation tree.

You can create a new node **on the root level** of the navigation tree or **as a sub-node** for a currently selected node.

Node metadata

When you create a new node, you can set the following options in a new dialog:

- **Name**: The node name is required at least for the configured default language.
- **Validation level**: The validation level describes the way in which the metadata of a node or the assets within are validated. See **Work with nodes** for more information.
- **Icon**: You can choose one of multiple configured icons for your node.

There may be additional tabs configured for the dialog, depending on the current node type. Additional metadata tabs contain information fields specific to your organization.

Import nodes

As a **power user with super-administrator permissions**, you can import multiple nodes into CELUM Content via system tasks:

- The "Import Hotfolder" system task is available out of the box, but **disabled by default**

If you want to enable the Hotfolder import, please contact your CELUM consultant.

- The "Importer" functionality requires a **product extension**

This product extension may require additional licensing costs!

Please see the dedicated Importer guide for your installed version in the **Customer Knowledge Base**.

Create nodes via API

CELUM offers several powerful APIs that allow you to create new nodes programmatically or to allow your own customers to create nodes via self-developed extensions.

- The SOAP API, which is based on the SOAP protocol and can be used to extend and integrate into CELUM Content
- The SDK, which is CELUM's own powerful API

You can find information on how to develop against the CELUM APIs in the **Customer Knowledge Base**:

- **SOAP API Guide**
- **SDK Guide**

FAQ and troubleshooting

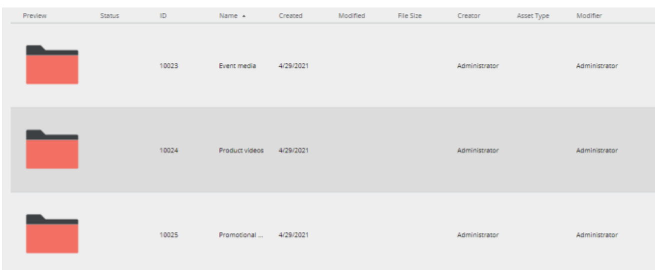
Why can't I save my node?

The most likely explanation is that the node has the "**strict**" validation level but also contains invalid information field values (probably in a different metadata tab). Look for empty required fields, fill them in and then try saving again.

View basic node information

To view basic object information, look no further than the **asset list** on any node type main view tab. In the table layout, the asset list shows a variety of columns, depending on **which metadata fields you chose to display**:

> You'll only see sub-nodes in the asset list if you have activated the option to show nodes in the active menu: .



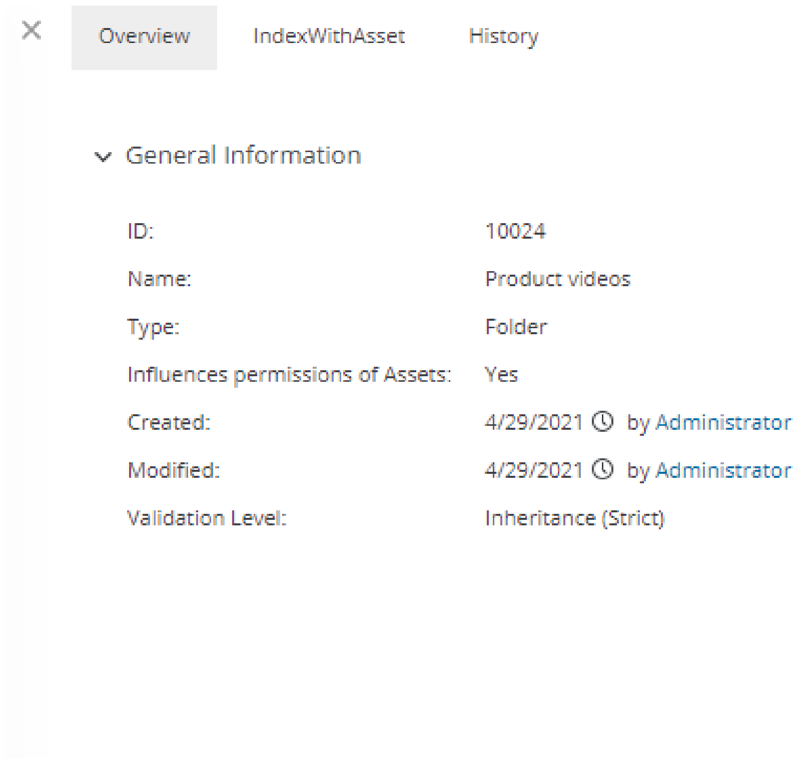
- Preview
- Created (date) & Creator (user)
- Name
- ID
- Modified (date) & Modifier (user)

To view more information about a selected node, open the **sidebar** with the button in the active menu. The sidebar slides in from the right side of the asset list and shows general information about a selected node. The sidebar content is configurable, but by default, it shows the following information about the node:

- General information like name, creation date, validation level and node type
- Existing PIN-Codes for the selected node

View all node information

To view all available metadata about a selected node, the **detail view** is the right tool. Simply expand the detail view with the "Show Detail View" button in the active menu:



The detail view opens from the right side of the application and has a resizable width. It contains the following **tabs** which show different node information:

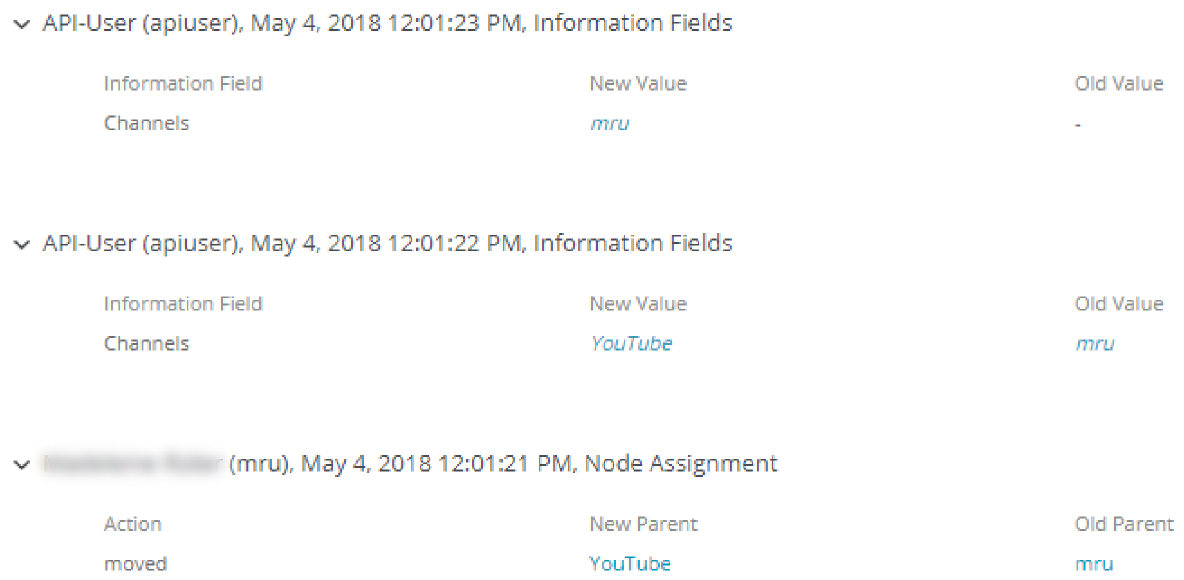
- **Overview**: This tab shows the same information as the sidebar.
- **<Metadata tab name>**: For each additional metadata configured on the current node's type, there is a dedicated tab in the detail view. It shows the information field values in this tab. If there are localized fields available, you can **change the value language** for these fields.
- **History**: This tab shows you an asset's modification history if you are a **super-administrator**. You can see which metadata of the asset was changed, when, and by whom. See **View node modification history** for a breakdown of this tab.

Switch metadata language

You can switch the display language in each metadata tab. You can only choose one language at a time.

View node modification history

As a **super-administrator**, you can see the "History" detail view tab for each node you select in the navigation tree. This tab shows a paged list of modifications to the node's metadata history.



Each entry in the list displays **which user** made changes to **which metadata** and **when**. You can see the information field label or property label on the left side of each entry, the new (current) value in the middle, and the old value on the right side.

The following changes get an entry in the history tab:

- Values of information fields were changed
- Node name was changed
- Permissions for the node were changed
- Node was added to or removed from another node

If a user who made a change and is listed in the modification history is deleted, the user name in each history entry is replaced by "deleted user".

Get notified about changes with subscriptions

Subscriptions allow you to stay up-to-date with changes within specific nodes. If you subscribe to a node, you receive an e-mail notification whenever any changes which you want to be informed about happen in the node.

To subscribe to a node, select it in the navigation tree, open the context menu, and choose the "Subscribe" menu entry. A dialog for **configuring the subscription** opens. Subscribed nodes are marked by the information bullet.

Configure a subscription

The subscription dialog consists of several sections which allow you to decide exactly which changes you want to be informed about and how often.

"General settings" section

Here you can decide if you want to be informed daily, weekly, monthly, immediately, or at a custom interval whenever a change in the subscribed node happens.

For custom notifications, your technical administrator can configure the interval in the back-end of your CELUM Content server.

Of course, you can also choose all options for maximum coverage.

"Scope" section

Here you can decide if you want to subscribe only to the currently selected node, or also to specific or all sub-nodes. If you subscribe to sub-nodes, you can additionally decide if you only want to subscribe to the sub-nodes or also to the currently selected node.

"Send notifications for these events" section

Here you can restrict which changes you want to be informed about. You can be informed about various aspects of assets or nodes within the subscribed node(s):

- Metadata changes
- Version changes
- Activation or deactivation (changes to the asset availability)
- Moving operations

For all these options except "Asset activated/deactivated", you can further restrict the changes with the icon to only be informed of specific information field changes or version/moving operations.

Once you have set up the subscription the way you want it, save the dialog with "Finish". The subscribed node is marked with the 🔔 icon in the navigation tree.

Unsubscribe from a node

If you no longer want to get e-mail notifications, open the context menu on the subscribed node and click the "Unsubscribe" menu entry. After you confirm the action, your subscription gets removed from the node and the 🔔 icon disappears from the node in the navigation tree.

Want to manually send a notification e-mail outside of the automatic cycle? As a super-administrator, you can send e-mail notifications via system task. The **Administrator Guide** in the **Customer Knowledge Base** provides information.

The fine-tuned subscription configuration may be overwritten if you edit the subscription for a node in the **Nova UI**, because subscription settings in Nova UI are not as detailed as in the Advanced UI.

Edit node metadata

1. Select a node in the navigation tree, open the context menu, and choose the "Edit" menu entry to open the Edit Metadata dialog.

> The Edit Metadata dialog for nodes does not offer a preview. It only consists of metadata tabs.

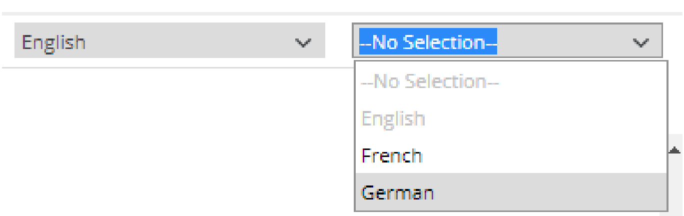
2. By default, the node metadata dialog only has the "General" **metadata tab**, which allows you to enter the node's name for each configured user interface language. Here, you also set the **validation level** and the icon for the node. However, your technical server administrator can configure other metadata tabs.
3. Confirm your changes with "Finish".

> You can only edit metadata for one node at a time.

Add values in multiple languages

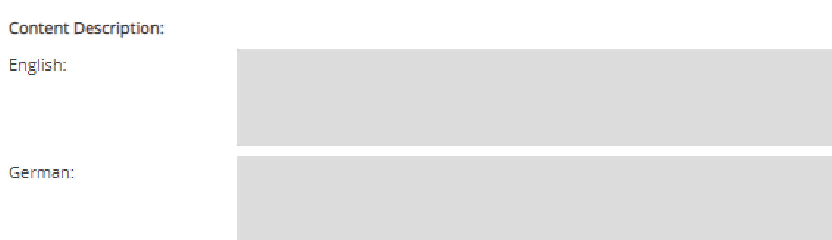
Along with normal text fields and text areas, the metadata may contain **localized** variants of such fields, which allow you to enter the field values in multiple languages. By default, only the application's default language is activated for each localized field (e.g. English).

In the node metadata dialog's top toolbar, you can choose a second language in a drop-down:



You can also switch the default language (left drop-down) to a different language, but you can only view a maximum of two languages at a time.

For each language which you activate, a new input field appears for each localized text field or text area:



Move nodes

To move a node from one parent node to another, simply select it in the navigation tree and drag and drop it from its current location onto another node.

Unlike assets, you cannot move nodes from a parent node in one main view tab (e.g. "Folder") to a node in a different main view tab (e.g. "Keywords").

Impact on asset metadata

Node-referencing fields in CELUM Content use specific nodes as their "root", as configured by an administrator. All sub-nodes of the specified "root" can be chosen as values for a node-referencing field.

If the **Linking Feature** is enabled for your CELUM Content server and the moved node is also **a value of a node-referencing field for an asset**, then that value will be removed from the associated field when the node is moved out of the field's "root". If the new parent node is the "root" for a different node-referencing field for an asset, the moved node will be added as a value to the assets' other field.

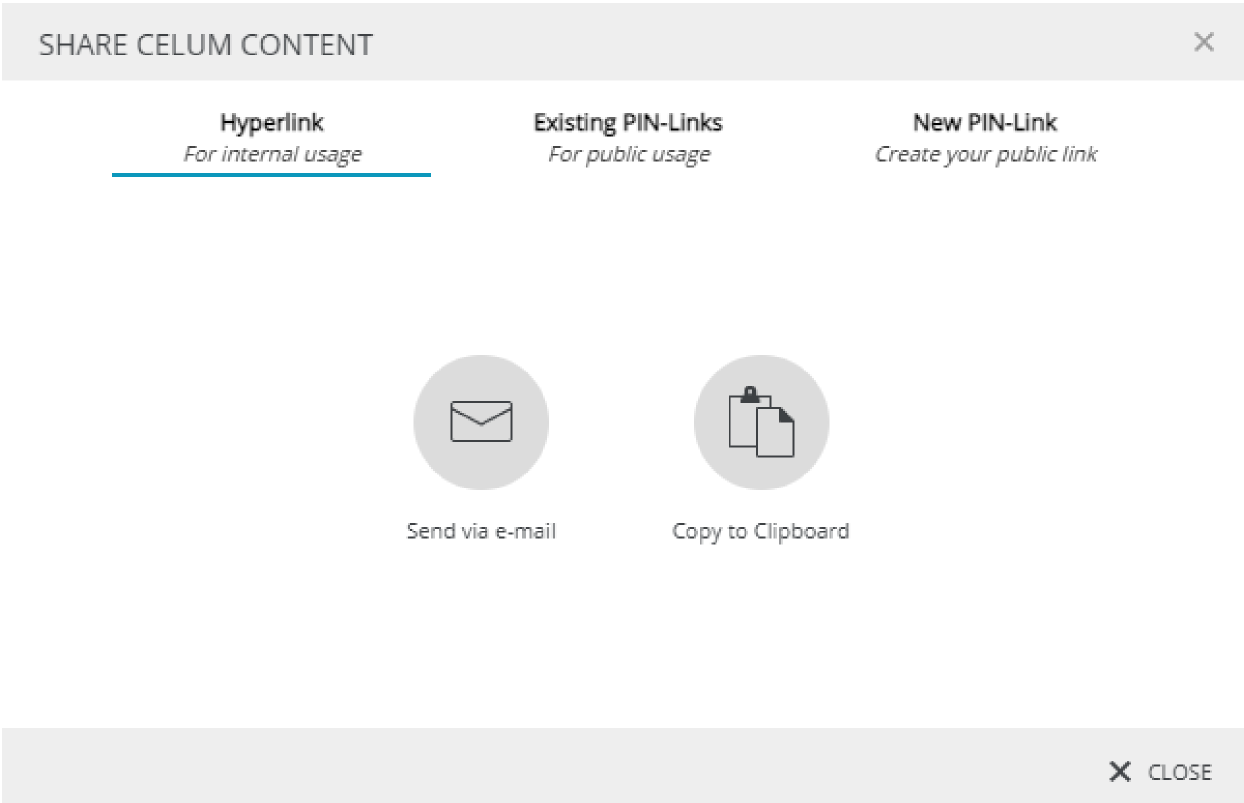
FAQ and troubleshooting

Can I assign nodes to multiple parent nodes?

No, unlike assets, a node can only have exactly one parent node.

Share nodes

The easiest ways of sharing nodes with other people is in the **"Share" dialog**:



To open the "Share" dialog, click the **"Share" action** in the context menu for a selected node. In the dialog, you have the following options for sharing your selected content:

- Share the content's internal **hyperlink**. You can use hyperlinks to share content with other CELUM Content users.
- Share an **existing external PIN-Link** for the current content or **create a new one**. You can use PIN-Links to share content with people who don't have a CELUM Content user account.

Alternatively, you can share a whole node structure and its assets with the **"Smart Views" product extension**. A **Smart View** makes the selected content available in a public brand portal with advanced navigation capabilities.

To see and share Smart Views, a product extension is necessary. **This may incur additional licensing costs!**

Share nodes with other users

You can share dedicated **hyperlinks** for nodes in CELUM Content with other users of CELUM Content:

1. Select a node in the navigation tree.

> If the option to show sub-nodes in the asset list is activated, you can select multiple nodes in the asset list.

2. Open the "Share" dialog for your selection.
3. By default, the "Hyperlink" dialog tab opens.
4. Copy the hyperlink(s) for the current selection via "Copy to Clipboard" or send it/them directly via e-mail.
5. If you choose to send it/them via e-mail, your operating system's e-mail client opens and automatically pastes the hyperlink(s) into the body of a new e-mail. A dedicated hyperlink is pasted for each selected node.

What happens when a hyperlink is opened?

If an asset's hyperlink is opened,the **asset list** with the contents of the shared node is shown and the node is selected in the tree.

> You can send internal hyperlinks to any **CELUM Content user**. However, the user must have the appropriate permissions in order to see the shared node(s).
>
> **People who do not have a CELUM Content account cannot open internal hyperlinks.** Use **PIN-Links** for external sharing instead.

Share nodes with external people

With CELUM Content's **PIN** and **Smart Views** functionalities, you can **share selected content for a specific period of time** with **other people** who do not have access to CELUM Content. This ensures that the people you make content available to can ONLY download the content you want them to have, when you want them to have it.

They are also **adaptable**, which means any changes in a node's content are also reflected for the recipients of a PIN-Link or a Smart View on that node. This allows you to create a PIN-Link or a Smart View directly after creation of a node and decide later which assets should be assigned to the node and shared with the recipients.

Share via PIN-Link

You need the local permission "Manage own PIN" on the selected content, otherwise you won't be able to use the PIN-Link function.

View and share an existing PIN-Link

1. Open the "Share" dialog for a node.
2. Switch to the second tab ("Existing PIN-Links").
3. The second tab in the "Share" dialog shows you all existing PIN-Links for the selected node. You can send each link via e-mail with ✉ or copy it to the clipboard with ⧉.

Permissions necessary for seeing others' PIN-Links

If you don't have the global permission "Administer PINs from other users", you can only see your own PIN-Links, not links created by other users.

The PIN landing page

Recipients of the PIN-Link can open the link in a browser, which opens the PIN landing page. On the landing page, recipients can choose from the available download formats for each asset to directly download each asset to their local file system. Alternatively, they can download all assets contained in the PIN-Link with one click or filter the available assets by their file type to download only assets of a specific type.

If they choose to download all or multiple assets, a ZIP file is created which is subsequently downloaded.

If the sent PIN-Link is invalid or unavailable, recipients will see an according error message instead of the included assets.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the node where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

Create a basic PIN-Link

1. Open the "Share" dialog for a node.
2. Switch to the third tab ("New PIN-Link").
3. Enter a name for the PIN-Link.
4. Optionally choose additional download formats which should be available.
5. Send the PIN-Link via e-mail or copy it to the clipboard.
6. The PIN-Link is automatically saved when you close the dialog.

Want to customize or edit a PIN-Link? Check how to create an **advanced PIN-Link** instead.

Create an advanced PIN-Link

If a **basic PIN-Link** is not enough, you can either edit existing or create new PIN-Links with additional properties in the "Manage PIN-Codes" dialog.

1. Open the dialog with one of the following options:
    - Open the "Share" dialog on a node and click the icon next to an existing PIN-Link in the "Existing PIN-Links" tab.
    - Open the "Share" dialog on a node and click the " Edit PIN" button in the "New PIN-Link" tab.
    - Open the context menu on a node and choose the "Manage PIN-Code(s)" menu entry.

- Open the sidebar on a node with existing PIN-Links. In the sidebar "PIN Codes" section, you can view and edit each active PIN-Link.

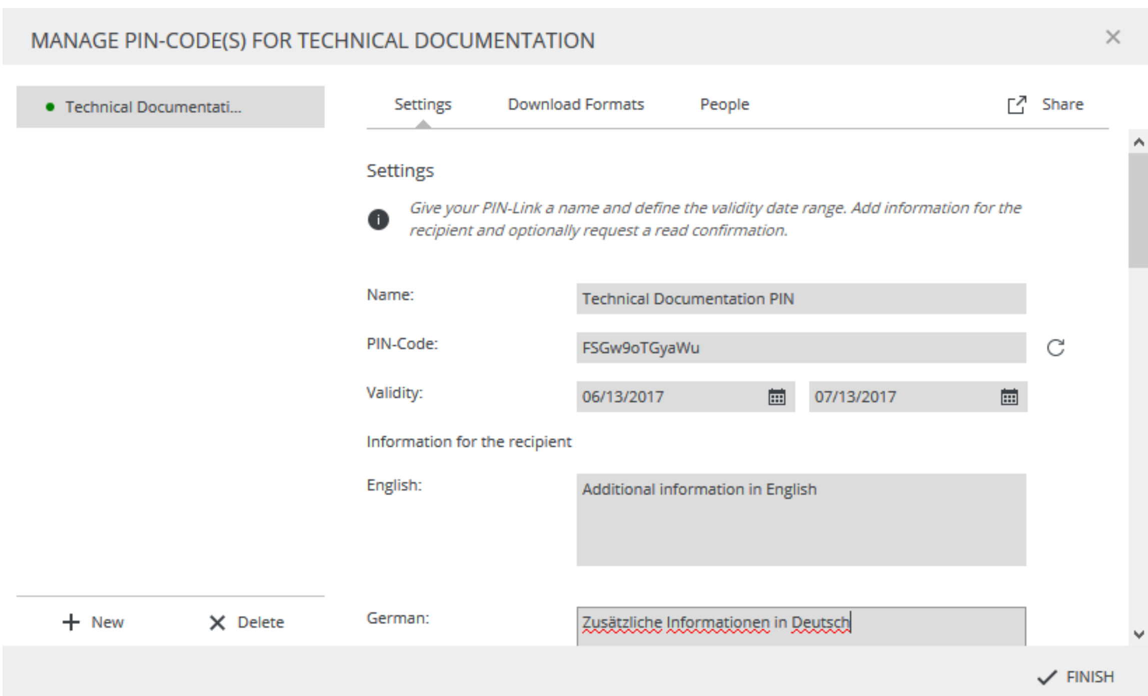
2. The "Manage PIN-Codes" dialog looks as follows:

   On the top left side of the dialog, you will see a list of existing PIN-Links which you can select. If no PINs are available yet, you will see the text "No PIN-Codes" available".

   On the bottom left side of the dialog, you can either **create a new** or **delete an existing** PIN-Link.

   On the right side of the dialog, the configuration options for the selected PIN-Link are listed. You can easily switch between the sections with the tabs at the top of the dialog.

   To share a selected PIN-Link, click "Share" in the top right corner.



3. Configure the link with the following advanced **settings**:
   - **Name**: Enter a name for the PIN-Link.
   - **PIN-Code**: Set the unique identifier for the PIN-Link. You can either generate the PIN-Code automatically with the button or manually enter a code.
   - **Validity**: Set the time period in which the PIN-Link is valid, i.e. in which recipients can download the content associated with it.

- **Information for the recipient**: Enter information which is displayed to the recipient on the PIN-Link landing page. You can enter the information in all available UI languages.
- **Confirm reading**: The recipients must check a box on the landing page that they have read the information.

4. Scroll down to the "**Download Formats**" section and choose one or multiple download formats for the content in the PIN, which determine the quality and size of the downloaded assets. Keep in mind that not every associated acontent can be downloaded in every chosen download format.

> Other people can only download a PIN if the PIN has at least one download format assigned.

5. Scroll down to the "**People**" section and choose users or user groups that should be able to access and/or edit the PIN-Link you created.

> Depending on which permissions you grant the users (**Edit** or **Read Only** permissions), they can either only see the PINs in the sidebar and view the detailed information in the dialog OR also edit or delete them.

> Independent of permissions, the users can forward the PIN to other users.

6. Click the "Share" button in the top right corner of the dialog. The link is displayed in a pop-up.
7. You now have two options to share the link:
   - – Send via e-mail. This automatically opens your default e-mail program and pastes the link into a new mail.
   - – Copy to Clipboard. This copies the hyperlink and you can immediately paste it somewhere.

Share via Smart View

Prerequisites

- The **"Smart Views" product extension** is deployed and configured correctly on your system. **This product extension may incur additional licensing costs!**

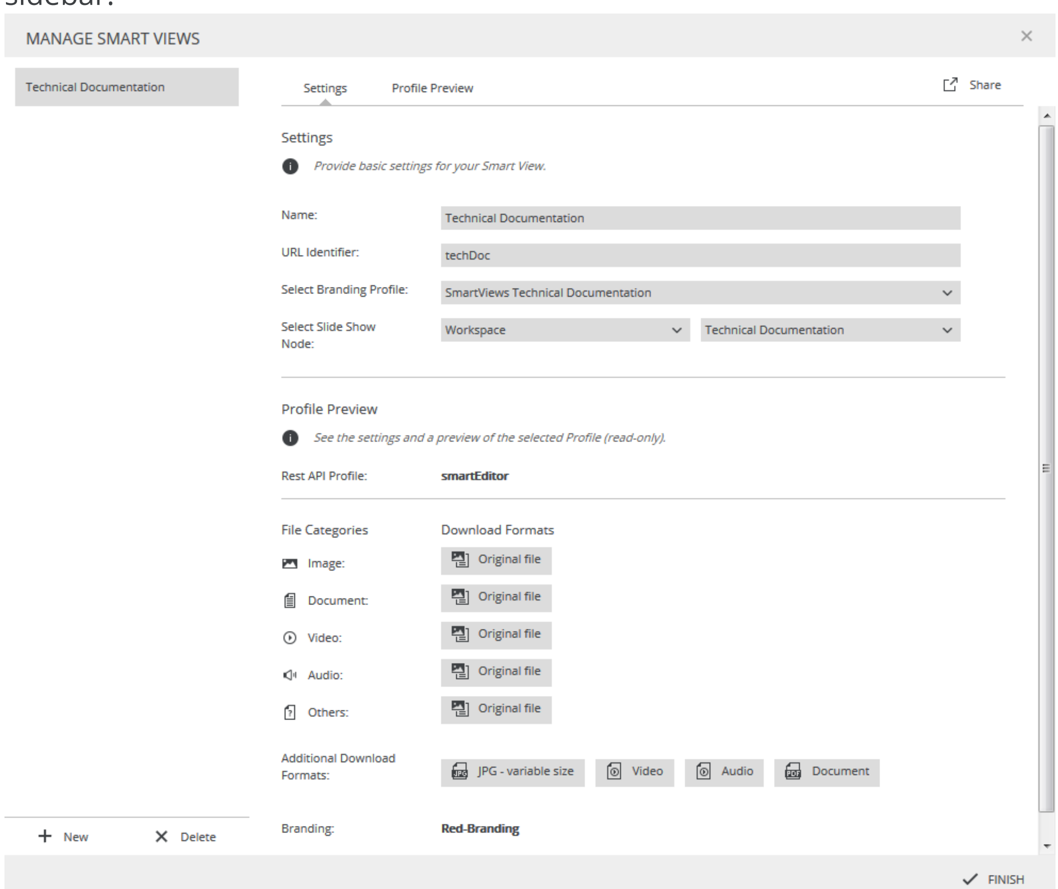
- You are allowed to see the "Manage Smart Views" context menu entry for the selected node.

You can find instructions for deploying and configuring the "Smart Views" extension in the **Customer Knowledge Base**.

Create a Smart View

Any user with the permissions to create Smart Views on specific nodes can do it in the following way:

1. Navigate to a node where you have the appropriate permissions.
2. Right-click on the node to open the context menu.
3. Choose the context menu entry "Manage Smart Views". A dialog opens.
    - If there are no Smart Views configured on the node yet, the dialog only contains a prompt for you to configure a Smart View. To create one, click the "New" button in the lower section of the dialog sidebar.
    - If there are already Smart Views configured, they are listed in the dialog sidebar.



4. For a new or existing Smart View, you can enter or see the following information in the "Settings tab":
    - **Name**: By default, this is the node's name.

> The Smart View name must be **unique** across the whole system, otherwise an error message will be shown on saving.

- **URL Identifier**: A unique identifier which is part of the Smart View's URL.
- **Branding Profile**: Choose one of the Smart Views Profiles which were configured in the Configuration Management.

> **Check "View"-permissions for recipients**
>
> To avoid accessibility problems with your Smart View, please check with the person who created the Smart Views Branding Profile if the user that was specified in the used API Authentication Profile also has "View"-permissions for the node on which you are creating the Smart View.
>
> If the user specified in the API Authentication Profile doesn't have "View"-permissions for that node, nobody will be able to view the Smart View's URL, because the REST API user's permissions determine whether the Smart View on a particular node is visible.

- **Slide Show Node**: Select a node whose assets are displayed in a slideshow during downloads from the Smart View.

> It is highly recommended to restrict the number of assets inside the slide show node to 10 to avoid problems during slideshow execution.
>
> If there are more than 10 assets inside the chosen slide show node, it is not defined which of the images will be shown in the slideshow.

- **Content:** Click on the link to see the content of the node shared via the Smart View.

5. Based on the chosen Branding Profile, the "Profile Preview" section is updated and shows a read-only preview of the Smart Views Profile configuration.
6. Save the Smart View via "Finish". This closes the dialog.

Share a Smart View

You can either share a Smart View before you save the "Manage Smart Views" dialog, or afterwards when you reopen the dialog. The "Share" button Share is located in the top right corner of the dialog.

1. Click on the button and copy the link to the Smart View.
2. Share the link with external people.
3. The external people can access the link and browse, view and download the assets contained in the node.

Manage Smart Views

You can create Smart Views on a specific node in CELUM Content via the "**Manage Smart Views**" context menu for the node.

Additionally, you can edit or delete a smart view via the same mechanism.

Prerequisites

- The **"Smart Views" product extension** is deployed and configured correctly on your system. **This product extension may incur additional licensing costs!**
- You are allowed to see the "Manage Smart Views" context menu entry for the selected node.

You can find instructions for deploying and configuring the "Smart Views" extension in the **Customer Knowledge Base**.

Edit a Smart View

1. Once you have the "Manage Smart Views" dialog open, click on the Smart View you would like to edit.
2. Make the changes.
3. Click "Finish" to apply the changes.

If you edit the "URL identifier" field, the recipient will no longer have access to the Smart View via the old URL.

Delete a Smart View

1. Once you have the "Manage Smart Views" dialog open, click on the Smart View you would like to delete.
2. Click on the "Delete" button in the lower section of the smart view list.
3. Confirm the deletion.

Once the Smart View is deleted, you cannot restore it and it will no longer be accessible to its recipients.

Save nodes as favorites

If you often work with the same nodes in the system, you may want to create a shortcut to them. These shortcuts in CELUM Content are called "favorites".

Set an node as a favorite

1. Open the context menu on a node.
2. Choose "Create Favorite" from the context menu.
3. A snackbar notifies you that a favorite was added.

Open a favorite node

You can find all your favorites in the "Home" main view tab (your Dashboard) in the "My favorites" start page widget.

Click a node in the widget to open the containing main view tab. The node is automatically selected.

Remove a node from your favorites

1. Open the "Home" main view tab (your Dashboard).
2. Click "Edit" next to the favorite header. A small trash bin icon appears next to each favorite.
3. Click the trash bin icon .
4. Click "Done" when you are finished.

Synchronize with CELUM Drive

CELUM Drive is one of CELUM's cloud services and enables you to synchronize content in CELUM Content to your local file system. It comes with a handy desktop app which you install on your local computer.

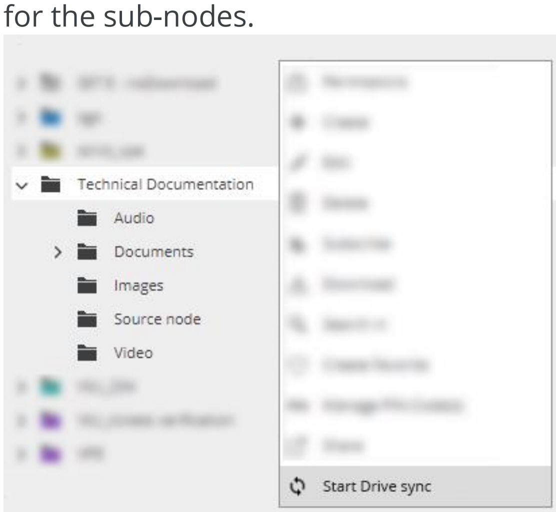
If the CELUM Drive functionality is subscribed by your organization, you can seamlessly transfer your content from CELUM Content to your local file system. The exact behavior depends on your system's configuration, as described **below**.

Prerequisites

- You need to have a **personal CELUM Cloud user account** with a permission to use your organization's subscribed services and you need to be **connected to it** in CELUM Content. Your organization must have a valid subscription for CELUM Drive.
- You need to **download the CELUM Drive desktop app** and install it on your computer. You can download the app from CELUM's customer portal **portal.celum.com**.

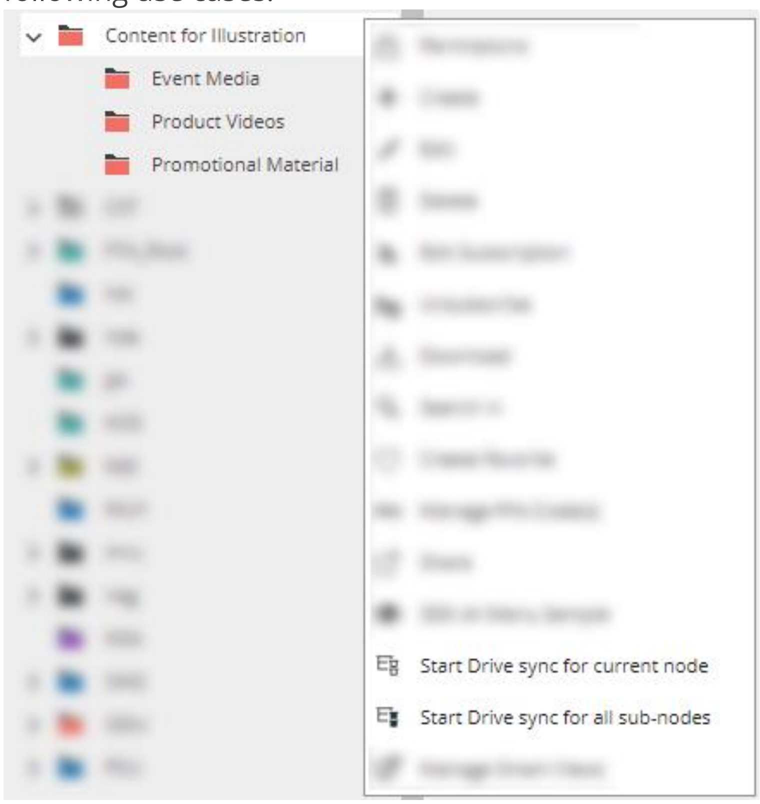
Start synchronizing a node

1. Navigate to a node which you want to synchronize to your local file system.
2. Open the context menu on the node.
3. Depending on your system configuration, you see the following actions in the context menu to start the Drive sync:
    - **1 action "Start Drive sync"**: Simply click this action to synchronize all assets in the currently selected node and its sub-nodes into a single flat folder in the **CELUM location** in your local file system. No folders are created locally for the sub-nodes.



> This is the default behavior. If you'd like to change this behavior, contact the technical administrator of your CELUM Content server so they can change the configuration.

- **2 actions "Start Drive sync for current node" and "Start Drive sync for all sub-nodes"**: Allows for more nuanced sync behavior. Decide between the following use cases:



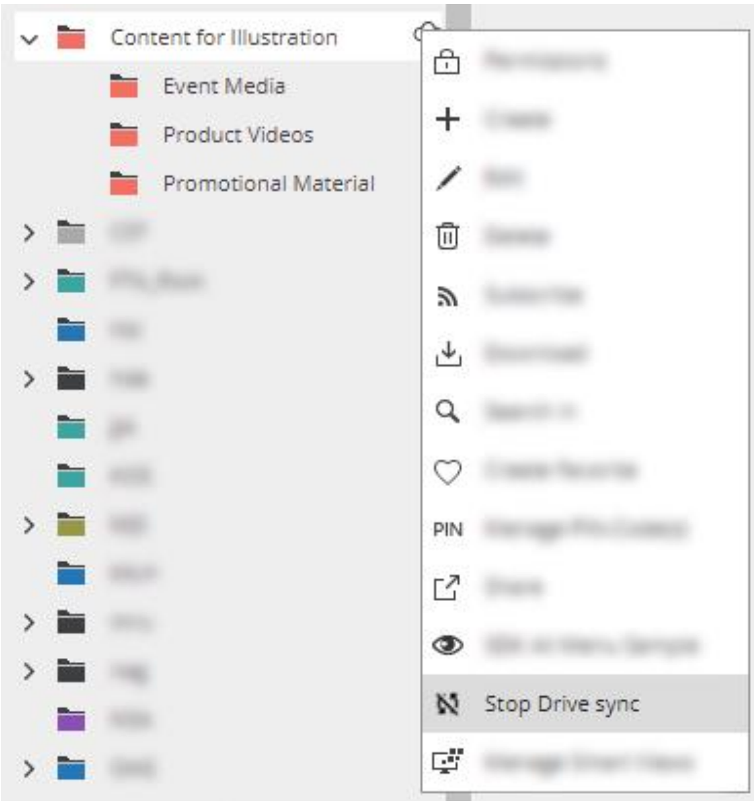
  - *Start Drive sync for current node*: Synchronizes all assets inside the current node and its sub-node hierarchy into a flat folder in your local file system. No local folders are created for sub-nodes.
  - *Start Drive sync for all sub-nodes*: Synchronizes the assets in the currently selected node's sub-node hierarchy, and recreates the direct sub-nodes as folders in your local file system. Assets directly inside the current node itself are not synced.

4. The current node and/or its sub-nodes are synchronized to your local file system according to the described behavior.

> Find more information about the CELUM location in the **CELUM Drive online help** topic "View synchronized files".

Stop synchronizing a node

1. Navigate to a node which you are currently synchronizing with CELUM Drive.
2. Open the context menu on the node and click the "Stop Drive sync" menu entry:



3. The node is no longer synchronized to your CELUM location.

The unsynchronized directory does not get deleted from your CELUM location (you get to keep all files which were synchronized so far), but no more changes will be received from the node in CELUM Content.

Some restrictions apply to the CELUM Drive synchronization due to permissions or node validation. Please consult the **CELUM Drive help topic** "Special cases for CELUM Content" for more information.

Delete nodes

1. Select a node in the navigation tree and open the context menu.
2. Click "Delete".
3. Click "OK" in the confirmation dialog.
4. The node is permanently deleted from the system.

If an asset inside the deleted node was also added to at least one other permission-defining node, it is still available in that node and not permanently deleted. If it was only located inside the deleted node, it is also permanently deleted.

Work with assets

Work with assets

In short, an asset is the representation of a digital file in CELUM Content. Assets are created when you upload files to CELUM Content. They always have an asset type which determines their metadata, and they can be downloaded again in different formats as well as distributed to connected systems.

A word about permissions

Not all asset types can be used by all users of CELUM Content. Equally, not all users can execute all actions on assets. The permissions are either determined by the user's own type or by the node that the asset is linked to.

View assets

You can see all assets in the currently selected node in the **asset list** in a node main view tab or the result list of the "Search" tab. There, you can select assets and execute actions on them.

Get more information

- **Create assets**
- **Assign assets to nodes**
- **Download assets**
- **View basic asset information**
- **Edit asset metadata**
- **Manage asset versions**
- **Share assets**

Adapt the asset list

The asset list shows all assets in the currently selected node or structure. You have multiple ways to adapt

- which objects are shown in the asset list,
- which information is shown about the objects, and
- how they are sorted.

Adapt view mode and shown objects

The "View" **active menu** area offers various ways to change which content is displayed in the asset list and how it is displayed:

- Click to show both assets inside the currently selected node and assets inside its sub-nodes.
- Click to show both assets and sub-nodes within the currently selected node.
- Use the zoom slider to make asset and node previews bigger or smaller.
- Click to show the asset previews in a table with the most important information about each asset.
- Click to show the asset previews as larger thumbnails. Additional information is then shown on mouseover.

The **asset list** itself offers a bottom toolbar which allows you to change the amount of assets per page and to switch between pages.

To expand or collapse the **sidebar** and **detail view**, use the following buttons in the **active menu:**

- Click to hide the sidebar completely.
- Click to show the sidebar.
- Click to expand the sidebar into the detail view.

Sort assets

A small arrow icon next to a column's name indicates that the asset list is sorted by this column. The arrow points **down** when the asset list is sorted in **descending** order and **up** when the asset list is sorted in **ascending** order.

To sort the asset list by a different column, just click the column header (name) of another column. The asset list will then be sorted in ascending order. Click the column header again to sort in descending order.

Alternatively, you can move your cursor over a column header until a bigger, downward-pointing arrow ˅ appears. Click the arrow to open the **column menu**. There, you have the two entries to sort ascending or descending.

Show or hide columns

To temporarily **hide** a column from the asset list, use the following approach:

- Move the mouse cursor over a column header until the downward-pointing arrow ˅ appears.
- Click the arrow to open the **column menu**.
- Move the mouse cursor over the "Columns" > "General" menu entry.
- The current list of asset list columns pops up. Use the check box next to each column to show or hide the column.

Rearrange columns

To **move** a column to a different position, simply drag the column header with your mouse and drop it to the new position. To **resize** a column, move your mouse cursor over the gap between two column headers and drag the cursor when it turns into a bidirectional arrow: ⇔.

FAQ

Why are asset list column headers also shown in thumbnail view?

Even if the asset list is in thumbnail view, you can use the column headers to sort the asset list in ascending or descending order.

Create assets

There are several ways to create new assets in CELUM Content:

- **Manually upload** them in the main view
- Via **bulk import**
- **Programmatically** via API
- Via **CELUM Drive**

Upload assets manually

The central tool for uploading assets to CELUM Content is the **upload basket**, which is part of the dock. You can upload assets via the upload basket in two ways:

Via drag & drop

1. Select one or multiple assets in your local file system.
2. Drag them onto the dock, which turns dark to indicate that the assets can be dropped there.
3. Release the mouse button to drop the assets.
4. The assets are added to the upload basket.

Via upload button

1. Click the upload button in the dock.
2. Your local file system's file chooser dialog opens.
3. Select one or multiple assets and confirm the dialog.
4. The assets are added to the upload basket as new assets.

Import assets

As a **super-administrator**, you can import multiple nodes including assets within them into CELUM Content via system tasks:

- The "Import Hotfolder" system task is available out of the box

> The configuration and behavior of the hotfolder import task is described in the **Administrator Guide** in the **Customer Knowledge Base**.

- The "Importer" functionality requires a **product extension**

This product extension may require additional licensing costs!

Please see the dedicated Importer guide for your installed version in the **Customer Knowledge Base**.

Create assets via API

CELUM offers several powerful APIs that allow you to create new assets programmatically or to allow your own customers to create assets via self-developed extensions.

- The SOAP API, which is based on the SOAP protocol and can be used to extend and integrate into CELUM Content
- The SDK, which is CELUM's own powerful API

You can find information on how to develop against the CELUM APIs in the **Customer Knowledge Base**:

- **SOAP API Guide**
- **SDK Guide**

Synchronize new assets with CELUM Drive

Synchronizing a node with CELUM Drive will equally synchronize all assets inside. You can create new assets directly inside the CELUM location on your local file system and they will be uploaded as new assets.

Further information

The topic **Synchronize with CELUM Drive** explains how to start the CELUM Drive sync in CELUM Content.

The CELUM Drive online help contains further information on how to manage the CELUM Content sync.

Next steps:

Before your uploaded assets can be seen and used by other CELUM Content users, you need to **release them from the upload basket** into the system.

Additionally, you can already **assign and asset type** and **edit the assets' metadata** directly in the upload basket. This makes it easier to release assets to certain nodes.

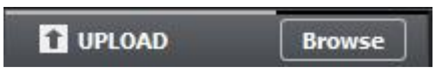
Manage the upload

You can monitor and manage the upload of new assets while it is in progress.

Monitor the upload progress

If the dock is expanded, you see the upload progress for each asset on the left side of the upload basket:

If the dock is collapsed, the upload button shows the overall progress of the whole upload with a loading bar:



Cancel the upload

You can cancel the progress when the dock is expanded. While the upload is running, select an asset in the progress area and click "Delete" to cancel just that asset's progress. Click "Delete all" in the progress area to cancel the upload progress for all remaining assets.

The assets which you cancel are not added to the upload basket as new assets.

Resolve duplicate assets

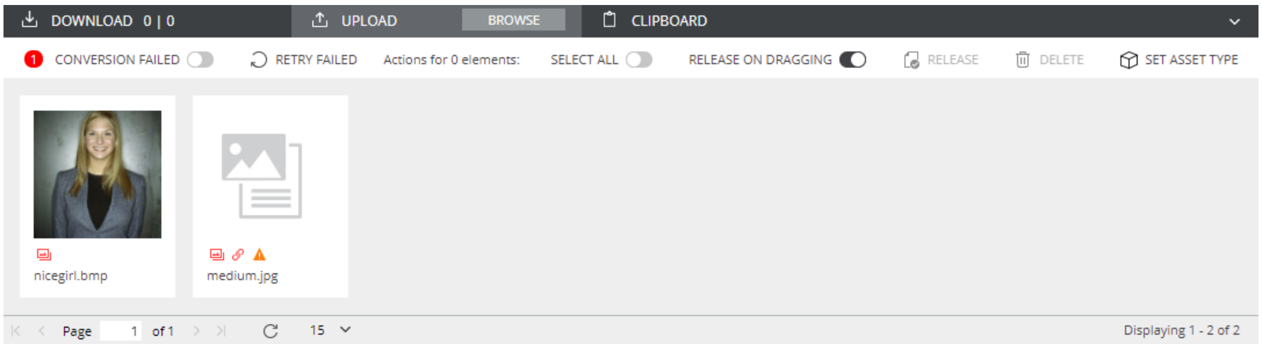
Sometimes, you may upload an asset which already exists in the system. CELUM Content automatically checks if the assets in the upload basket already exist. These duplicated assets are marked with a special bullet in the upload basket. Additionally, the upload basket's menu bar gets an additional "Duplicates" button.

In order to avoid unwanted duplicated assets, you can upload the assets as new versions for the already existing assets instead:

1. Click the "Duplicates" button in the upload basket's menu bar. A dialog opens.
2. The dialog shows a list of all duplicated assets. You also have the option to filter the duplicates by different criteria:
    - Check the "Restrict search scope" check box and choose a specific node type and node in order to only list assets which already exist in the chosen node.
    - Switch between the tabs which allow you to filter for the amount of duplicated assets:
        - "All Matches" lists all duplicates, independent of the amount of already existing assets
        - "Unique" Matches" lists all duplicates which have exactly one already existing asset.
        - "Multiple Matches" lists assets which have multiple existing duplicates in the system.
3. Select specific duplicated assets in the list via their check boxes or use the option to select all.
4. Click the "New version" button in order to upload the selected duplicates as new versions of their existing assets. These duplicates will be removed from the list.
5. Click "Close" to close the dialog. The duplicates which you uploaded as new versions are removed from the upload basket.

Deal with upload issues

If the processing of assets in the upload basket fails, the previews for failed assets cannot be created. The assets have a generic placeholder image assigned to them and a failure icon ( ) is added:



Now you have some options within CELUM Content to discover the problem and potentially solve it.

Filter failed assets

Click the "Conversion failed" toggle button in the upload basket's menu bar to filter only failed assets.

Retry failed assets

Sometimes, a conversion error is only a temporary hiccup which may resolve itself. This can for example be the case if your connection to the CELUM Content server is slow. Use the "Retry failed" option in the upload basket menu bar or open the context menu on a failed asset and choose the "Recreate previews" menu entry. This triggers another conversion attempt and you can see if the problem persists or is now resolved.

View conversion errors

1. Select a failed asset in the upload basket.
2. Open the context menu and choose the "Show conversion errors" menu entry. A dialog opens.
3. In the dialog, you will find a **Conversion-ID**, which can give you information about the error.

If you cannot solve the problem within the application, contact a technical server administrator and forward the Conversion-ID to them. The technical server administrator can check the log files and fix the problem directly on the server.

If only the asset preview generation failed for some reason, you can **recreate the previews** as a super-administrator.

Additionally, the **Conversion Status** gives additional information about failed asset conversions. See the **Administrator Guide** in the **Customer Knowledge Base** for more information.

Recreate asset previews

As a super-administrator, you can recreate previews for all assets in the system.

This is especially useful for assets whose preview generation or conversion failed during the upload. Such assets have a generic placeholder icon instead of their actual preview in the asset list or dock:

Recreate the preview for a single asset

1. Select a single asset in the asset list, download basket, upload basket, or clipboard.
2. Open the context menu for the asset.
3. Click the "Recreate Previews" context menu entry.

To check the progress of the preview generation, refresh the asset list. You can then see the progress bar underneath the asset's thumbnail.

Recreate the preview for multiple assets

1. Select multiple assets in the asset list, download basket, upload basket, or clipboard.
2. Open the context menu for the assets.
3. Click the "Recreate Previews" context menu entry.

To check the progress of the preview generation, refresh the asset list. You can then see the progress bar underneath the assets' thumbnails.

You can select multiple or all assets in the currently selected node or in the different dock tabs. However, you cannot select assets from multiple nodes or from all three dock tabs (Download basket, upload basket, and clipboard).

The "Preview Generation" category of **system tasks** offers additional ways to deal with failed preview generations. Additionally, the **Conversion Status** gives additional information about failed asset conversions.

See the **Administrator Guide** in the **Customer Knowledge Base** for more information about **system tasks** and **conversion status**.

Assign assets to nodes

Nodes serve as organizational units to categorize assets. After the assets land in the upload basket, you can assign them to different nodes and make them available to other users in the system.

Release assets from the upload basket

In order to make assets available to the whole CELUM Content system and all other users, you need to **release** them from the upload basket into the asset list.

Prerequisites for releasing

You can release assets only to **permission-defining nodes**. Additionally, the asset metadata must be **valid:**

- To release the assets to a node with **validation level** "*strict*", an asset type must be set and required fields must be filled.
- To release the assets to a node with **validation level** "*tolerant*", asset type and required fields are optional.

You can release them either in one step or in two steps:

- **One-step releasing**: If you only want to assign the assets to a single permission-defining node at the start, you can **activate** the "**Release on dragging**" option in the upload basket's menu bar. Then drag the assets onto a node and they will be automatically released (as long as they have valid metadata).
- **Two-step releasing**: If you want to assign the assets to different nodes in different main view tabs before releasing them to a permission-defining node, **deactivate** the "**Release on dragging**" option. Then, assign the assets to all target nodes (including the permission-defining node) and click the "**Release**" action in the upload basket's menu bar.

Move or add assets within the same main view tab

Once an asset is released to a node, you can further spread it around the system.

- Drag and drop an asset with your mouse to **move** it from one node to another within the same main view tab.
- Press the Alt key on your keyboard and drag an asset at the same time to **add** it to another node within the same main view tab. The asset also stays assigned to the node it was originally in.

If the **Linking Feature** is enabled for your CELUM Content server, and if the target node **can be node-referencing fields values** (such as tags), it will automatically be added to the assets' metadata.

Move or add assets to nodes in other main view tabs

Assets don't have to stay only in nodes of the same node type (main view tab). You have multiple ways to add or move them to nodes of other node types.

Via the dock

1. Open the dock and switch to the "Clipboard" section of the dock.
2. Drag and drop assets from the asset list to the clipboard.
3. Switch the main view to a different node type (main view tab).
4. Drag and drop the assets from the clipboard to the target node(s).

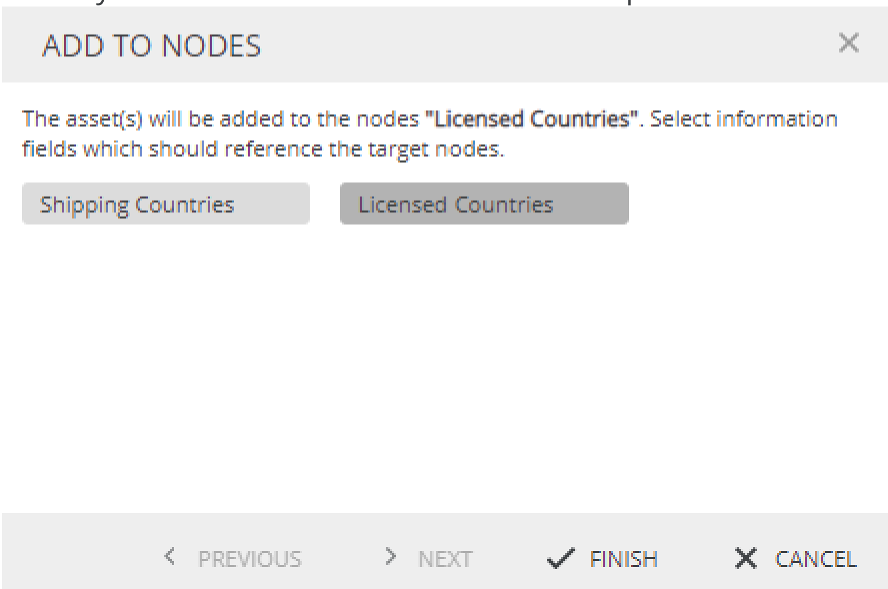
After you have added the assets to all the nodes you want, you can remove them from the clipboard via the "Remove" action in the clipboard's menu bar or the selected asset's context menu.

Via the "Add to Nodes" action

1. Select assets in the asset list and open the context menu.
2. Click the "Add to Nodes" action. A dialog opens.
3. The dialog has a three-column layout:
    - The left column lists all available node types. Click on a node type name to select it.
    - The middle column lists all nodes of the selected node type which you are allowed to add assets to. Click on a node name to add the assets to it.
    - The right column lists all nodes which the assets will be assigned to.
4. Click "Finish" to confirm the dialog and add the assets to the selected nodes.

If the **Linking Feature** is enabled for your CELUM Content server, and if the chosen nodes **can be node-referencing fields values** (such as tags), they will automatically be added to the assets' metadata.

If the target node can be referenced in multiple fields for the current asset, a dialog appears where you can select which fields should be updated:



Add assets to nodes via metadata linking

The CELUM Content Linking Feature enables you to add assets to nodes that are also **values in node-referencing fields for the assets**.

Before adding an asset via metadata editing, the asset has to have an asset type assigned and mandatory metadata set. Additionally, the Linking feature needs to be enabled for your CELUM Content server.

To add assets to nodes during metadata editing:

1. Edit selected assets' metadata. You can edit metadata for a **single** or **multiple assets**.
2. Navigate to the node-referencing fields and select one or more values (which also exist as nodes in the system).
3. Save the changes in the assets' metadata.
4. The values will be added to the metadata fields and the assets will be added to the respective nodes.

It depends on your CELUM Content server's configuration whether all or only specific node-referencing fields will trigger automatic adding to nodes.

If you change the asset type, the node-referencing fields may change. If this is the case, the added metadata will be lost and the assets removed from the respective nodes.

Remove assets from a node

1. Select an asset in the asset list and open the context menu.
2. Click the "Remove Asset from <Node type>" action.
3. Click "OK" in the confirmation dialog.
4. The asset is removed from the selected node.

If the selected asset is only assigned to the currently selected node or only one (currently selected) permission-defining node, then the option to remove the node is not available. However, you can still completely **delete** the asset from the system.

Automatic removal via Linking Feature

If the **Linking Feature** is enabled for your CELUM Content server and if the nodes from which the selected assets were removed were also **node-referencing fields values for the current assets** (such as tags), they will automatically be removed from the assets' metadata.

Equally, you can automatically remove assets from nodes while editing the asset metadata. Simply edit a node-referencing information field on the asset and remove some values. The asset will subsequently be removed from the respective dereferenced nodes.

Show all nodes for an asset

In order to keep track of all the nodes that your assets are assigned to, you can use the "**Go to Node**" action in a selected asset's context menu. It opens a dialog which lists direct links to all nodes that the asset is assigned to, organized by their node type.

Click on a node's path in order to navigate to that node in the main view.

FAQ

Why can't I add assets to all nodes which I can see?

The most likely cause for this is that you do not have the local, role-based "Add Assets" or "Move Assets" permissions on the node in question. You need these permissions in order to be able to add or move assets to the node. Not having these permissions does not preclude you from seeing and navigating to the node in the navigation tree, so you can see it but not add assets to it.

View basic asset information

To view basic object information, look no further than the **asset list** on any node type main view tab. In the table layout, the asset list shows a variety of columns, depending on **which metadata fields you chose to display**:

- Asset preview
- Created (date) & Creator (user)
- Status
- Name & File name
- File size
- Asset type
- ID
- Modified (date) & Modifier (user)

To view more information about a selected asset, open the **sidebar** with the button in the active menu. The sidebar slides in from the right side of the asset list and shows general information about the asset. The sidebar content is configurable, but by default, it shows the following information:

- A larger preview with playback function for video and audio assets
- General information like name, creation date, or asset type
- Locking information (if the asset is locked)
- File information
- Existing PIN-Codes

View the asset status

The asset list shows you a quick overview of an asset's metadata status in the form of "**bullets**". Bullets are small information icons which show a specific symbol to indicate the status of an asset, for example if an asset is unreleased, is missing required metadata, or is locked.

In the asset list's list mode, you will find the bullets in the dedicated "Status" column. In the asset list's thumbnail mode, you find the bullets directly below each thumbnail.

Move your mouse over a bullet to see more detailed information about the indicated status.

Available bullets

The CELUM Content application is highly configurable, so only a small set of standard bullets is available out-of-the-box. Your application may have additional bullets configured or may be using different icons for its bullets.

The selected asset has no asset type assigned.

The selected asset is not assigned to a permission-defining node and is therefore not released from the upload basket. Other users cannot see this asset.

The selected asset has valid metadata (e.g. all required information field values).

The selected asset is missing required information field values.

The asset is not released from the upload basket, so other users cannot see or use the asset.

An error occurred during the conversion of the asset either during upload or download.

The asset is locked for modifications, either because it was locked explicitly or because another user is currently editing its metadata.

The asset's availability is set to "Not available". Depending on their permissions, not all users may be able to view, edit, or download these assets.

At least one matching asset exists in the system.

i i i If more than a certain number of bullets are shown for an asset, the specific bullets are hidden behind this general information bullet. Move your mouse over the bullet to see all specific status information.

If active, the asset has been added to or from CELUM Work and is still available in CELUM Work. **If inactive**, the asset has been added to or from CELUM Work, but is no longer available in CELUM Work.

View all nodes an asset is assigned to

Assets can be linked to multiple nodes of multiple node types. To find out which nodes an asset is linked to,

1. Select an asset in the asset list.
2. Open the context menu for the asset.
3. Choose "Go to node" in the context menu.

4. All nodes which the asset is linked to will be displayed in a new dialog. The dialog also shows you the exact path to each node.

To open a specific node, click on its path in the dialog.

View all asset information

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

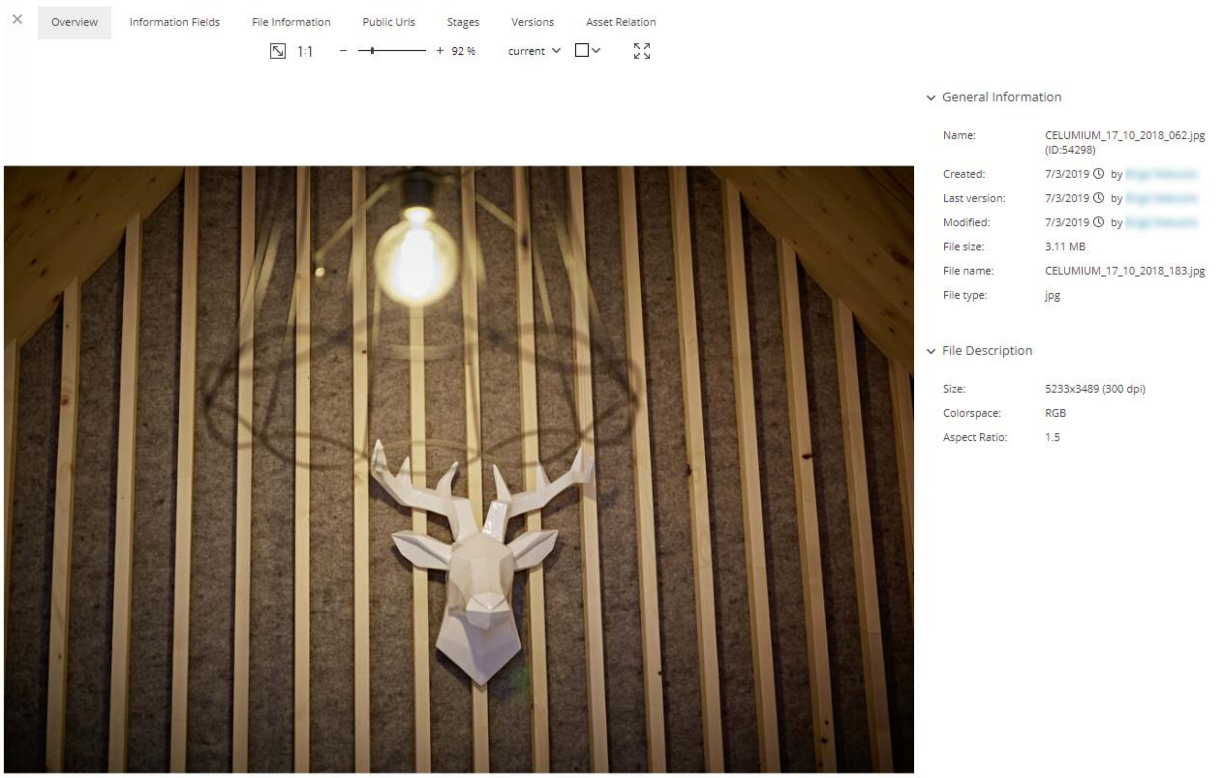
- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

Metadata allows you to structure, categorize, and describe assets within the system. You can view all metadata for a selected asset or in the **detail view**:

- Either double-click an asset in the asset list,
- or expand the detail view with the "Show Detail View" button in the active menu:

Layout and information in the detail view

The detail view opens from the right side of the application and has a resizable width. It contains the following **tabs** which show different asset information:



- **Overview**: This tab shows the same information as the sidebar and additionally a large asset preview with various options. See **Preview assets** for more information.
- **Information Fields**: This tab shows all available information fields for the asset, as well as their values. If the information fields are organized in multiple metadata tabs, the tabs are displayed on the left side of the detail view tab. If there are localized fields available, you can **change the value language** for these fields.
- **File Information**: This tab shows all available file metadata for the asset. File metadata is metadata that is attached to the asset's binary (original file) and gets added to the asset during upload.
- **Stages**: This tab shows you all media platforms (Stages) that the asset is published to. See **Publish Asset to media platforms** for a breakdown of this tab.
- **Asset Relations**: This tab shows you all related assets for the selected asset. See **View an Asset's related objects** for a breakdown of this tab.
- **Versions**: This tab shows you a list of all previous versions of the selected asset. You can also upload a new version here. See **Manage Asset versions** for more information.
- **History**: This tab shows you an asset's modification history. You can see which metadata of the asset was changed, when, and by whom. See **View an Asset's modification history** for a breakdown of this tab.

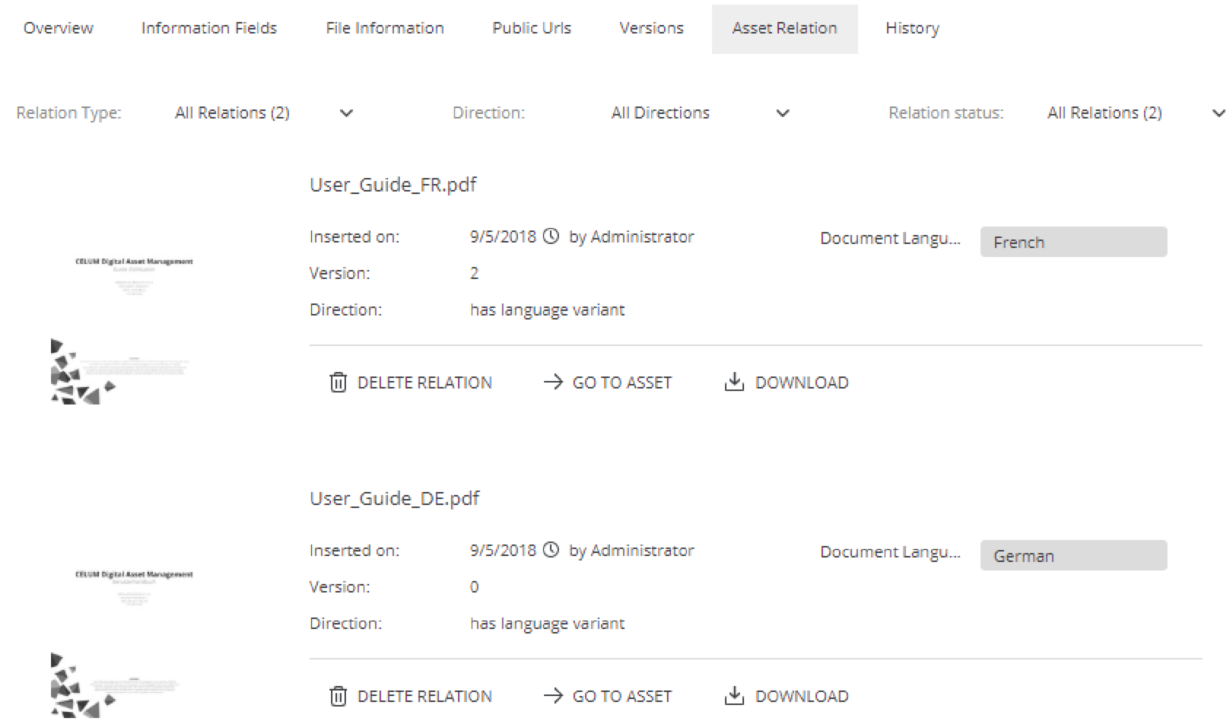
- **Public URLs**: This tab shows all public URLs for the asset. It provides a good overview if the same asset is published, for example, to multiple channels on YouTube. See **View external references** for more information.

Switch metadata language

Switch the display language in the "information fields" tab. You can change it in all information field sections except "General". You can only choose one language at a time.

View related assets

Asset relations are used to link similar or otherwise related assets to one another. You can view a selected asset's relations in the "Asset Relation" detail view tab:



For each related asset, a **preview image** is displayed on the left side of the tab. In the middle section of the tab, information about each relation is shown. This includes the **creation date** for the relation and **who created it**, which **version of the related asset** the relation was established with, and the **direction of the**

The above screenshot shows existing relations for the currently selected asset "User_Guide_EN.pdf". The relations in this case read as follows:

- User_Guide_EN.pdf has (the) language variant "User_Guide_DE.pdf" with the content language "German".
- User_Guide_EN.pdf has (the) language variant "User_Guide_FR.pdf" with the content language "French".

To learn how to establish such relations yourself, see **Manage asset relations**.

Filter relations

At the top of the detail view tab, you can filter the related assets by different aspects:

- Show only relations of a specific relation type
- Show only relations with a specific direction
- Show only relations with a specific status (**Broken** relations or **outdated** versions).

Relations with **outdated versions** are relations that were established to an earlier version of the related asset. If asset C is related to version 2 of asset D and asset D gets a new version (version 3), then the relation to it will be shown as outdated in asset C's detail view. In asset D's detail view, all established relations are removed, because relations are always tied to a specific asset version. Outdated versions are marked with the ⚠ icon.

Broken relations are relations that were established to a now deleted asset. If asset A is related to asset B and asset B is deleted, then the relation to it will be shown as broken in asset A's detail view. Broken relations are marked with the ✖ icon and the deleted asset's preview and name are removed from the detail view tab.

Download related objects

Click the "Download" button underneath a relation.

Go to a related asset

Click the "Go to asset" button underneath a relation. The related asset is automatically selected in the asset list and its detail view is shown.

FAQ and troubleshooting

Which relation types are there?

By default, you can set only the "**Language variant**" relation type within the CELUM Content application. If you are using CELUM's Adobe creative.connect or Microsoft® office.connect desktop integrations, all assets which are linked to an Adobe or Microsoft® Office® document are automatically related to the document, which is also saved to the CELUM Content server.

Various CELUM Content extensions require additional relation types, which the technical server administrator can configure.

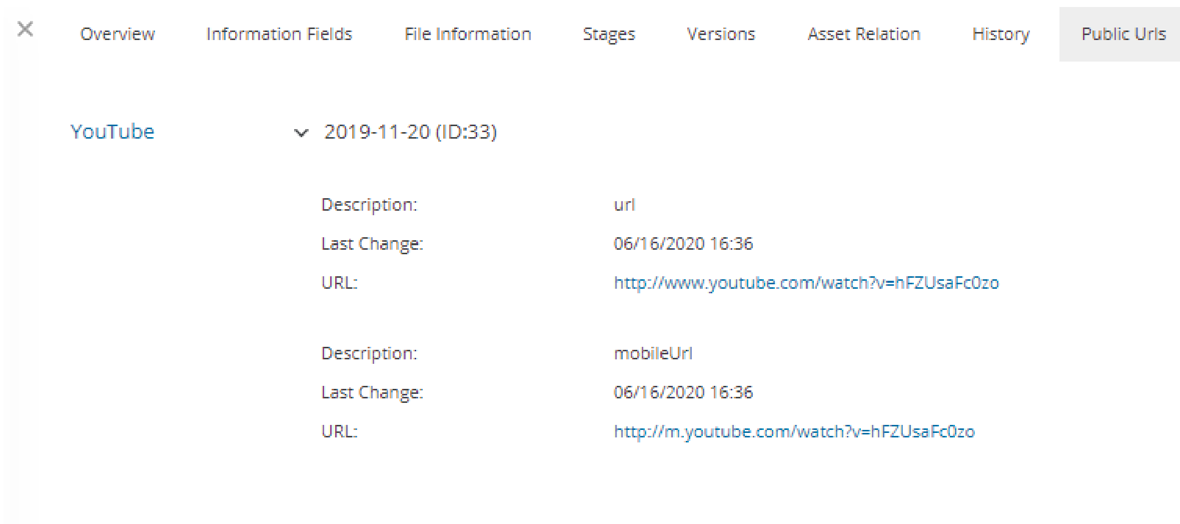
Why can I create a relation for some assets, but not for others?

The most likely explanation is that you don't have the necessary permissions to establish the relation. The out-of-the-box relation types only require that you are able to view both the source and the target asset, but there may be other permissions required for custom relations.

View external references

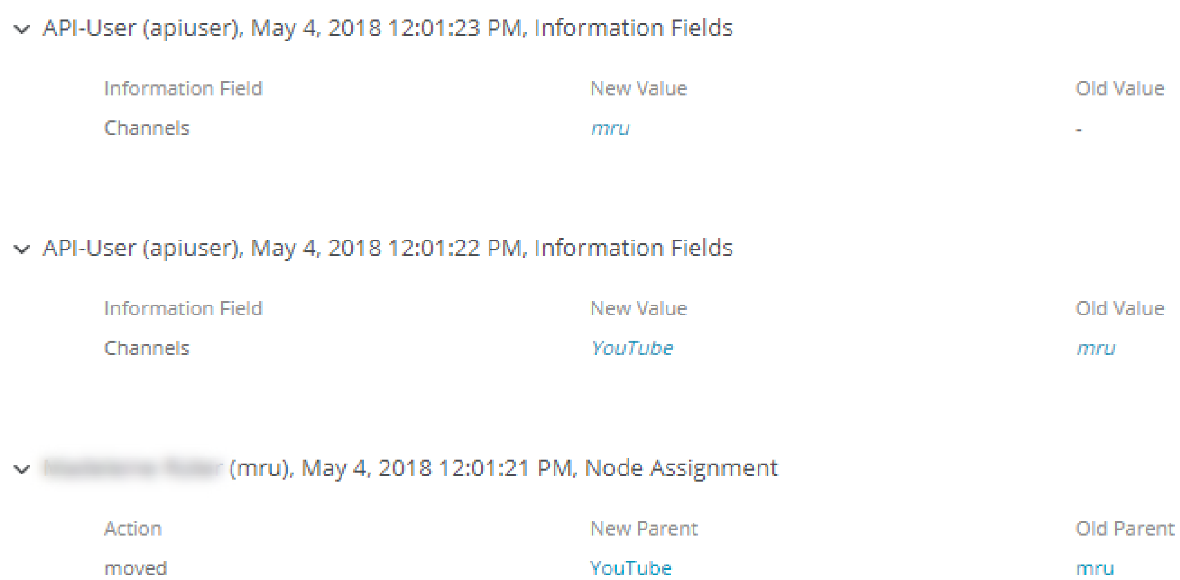
The detail view tab shows all URLs under which the current asset is reachable publicly. These URLs are generated if an asset is, for example, distributed via CDN, published on a website or media platform directly from CELUM Content. Certain product extensions like the Exporter also generate a URL reference.

For every public reference, the tab shows a description, the last change date as well as the clickable URL itself:



View an asset's modification history

As a **super-administrator**, you can see the "History" detail view tab for each asset which you select in the asset list. This tab shows a paged list of modifications to the asset's metadata or version history.



Each entry in the list displays **which user** made changes to **which metadata** and **when**. You can see the information field label or property label on the left side of each entry, the new (current) value in the middle, and the old value on the right side.

The following changes get an entry in the history tab:

Preview assets

The simplest way to preview assets is in the **sidebar**, where you see a still image for selected image and document assets and can play audio and video assets in a small media player. Open the sidebar via the icon in the active menu.

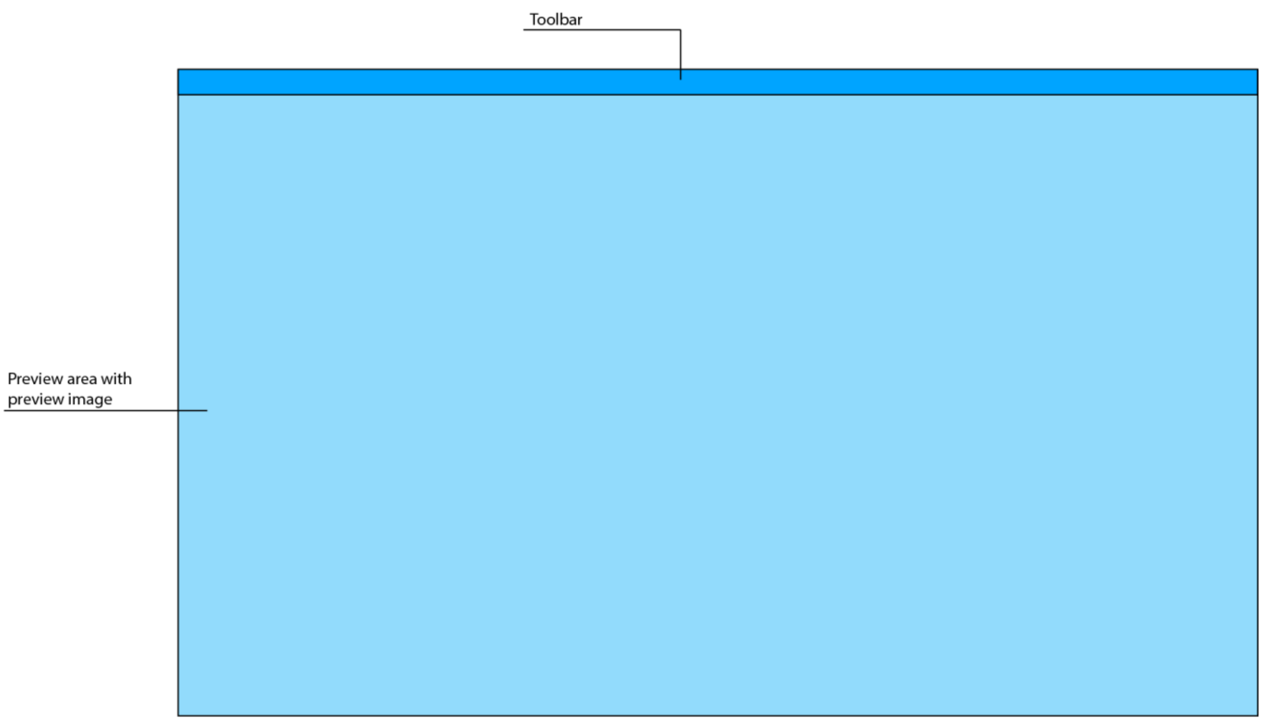
You can also open the "Overview" **detail view** tab in order to see a large interactive preview, where you can use the different functions in the preview toolbar to **manipulate the preview**. The detail view also allows you to flip through multi-page document assets.

The largest available preview for all assets is the **full screen preview**, which you can open in the following ways:

- Open the context menu on an asset and click the "Fullscreen Preview" menu entry.
- Open the detail view's Overview tab for a selected asset and use the icon in the preview toolbar.

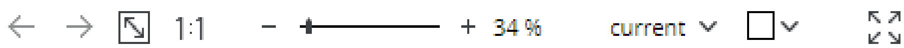
Layout of the asset preview

The preview area in the detail view and full screen preview generally looks as follows:



Manipulate the preview

The preview toolbar is available in the Overview tab of an asset's detail view as well as in the full screen preview and the **compare view**. It offers various functions to get the most out of the asset preview (from left to right):



- Jump to the previous asset in the current node. This function is not available in the detail view.
- Jump to the next asset in the current node. This function is not available in the detail view.
- Fit the preview image to the available space.
- View the preview image in its full size (may exceed the available space).
- Manually change the zoom level of the preview image.
- View a specific version of the currently selected asset. By default, the current (latest) version is shown.
- Change the preview area's background color. This can help you increase the contrast on the preview image and to focus on different aspects of the image with each background color. By default, the preview area has a white background.
- Open or close the full screen preview. When the full screen preview is open, this icon changes to ✕.

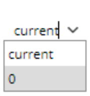
In the **compare view**, the additional / icon allows you to "lock" and "unlock" the toolbar. If the toolbar is locked (), all toolbar functions affect both sides of the compare view. This allows you, for example, to zoom into the same position on both preview images. If the toolbar is unlocked (), the toolbar on either side only affects that same side.

In addition to previewing single assets, you can also **compare two assets or asset versions** with each other.

For video assets, you can additionally **replace the preview image with a video frame** of your choosing.

View previous asset versions

You can preview previous versions of an asset in the "Overview" tab of the detail view. The preview toolbar provides a drop-down, where all versions (most recent on top) are listed:



Compare assets

Sometimes you may want to compare two assets in order to see differences and find potential for improvements. For this purpose, you can open the **compare view** for the assets.

The compare view opens over the whole screen and consists of two separate **preview areas and toolbars** side by side. The toolbar functions are the same as in the normal preview or full screen preview. You can even open the full screen preview for each asset with the button.

Compare assets

1. Select two assets in the asset list and open the context menu.
2. Click the "Compare View" menu entry to open the compare view.

Lock the compare view

You can lock the two preview areas' toolbars with the button in order to **manipulate both sides** of the compare view at the same time. Click the button again to unlock the toolbars again.

Close the compare view

At the top of the compare view, you can see a gray bar. Click the "Close" button on the right side of the bar to close the compare view.

Compare asset versions

As assets can have multiple binary file versions, you may want to compare these versions to see what has changed. This is easily possibly in the detail view:

1. Select an asset in the asset list and open the detail view.
2. Go to the "Versions" detail view tab.
3. The asset's versions are sorted from the current version to the first version.
4. Click the "Compare with current" button on any version other than the current version to open the compare view.

   You can only compare an older version to the current version directly in CELUM Content. If you want to compare two older versions, **download** them both and compare them in your file system or **reactivate another older version** in order to compare it.

The "Versions" detail view tab also offers you other ways to **manage asset versions**.

Change a video asset's preview image

> You need to have the local permission to manage asset versions on the node which contains the video asset in order to use this function.
>
> Additionally, this feature needs to be configured in the server back-end by a technical administrator.

By default, CELUM Content uses the frame at the exact middle of a video asset in order to generate its preview image. This may not always be appropriate, as the preview image may therefore be a completely black, completely white, or otherwise unusable frame. This makes it hard to see from the preview image what a video asset is about.

In order to improve the video asset preview, you can replace it with any frame in the video:

1. Play the video or navigate in the player's progress bar to the wanted time frame.
2. Move your mouse over the video player until you see the camera symbol in the top right corner of the video player.
3. Click the camera symbol.
4. The preview in the asset list is immediately updated to the new frame. If you deselect and reselect the asset, the preview in sidebar and detail view also shows the new frame.

You can do this directly in the video player in the following places:

- A selected video asset's sidebar
- A selected video asset's detail view
- A selected video asset's full screen preview and compare view

Set or change the asset type

Metadata for assets are always bound to a specific **asset type**, which means in order to edit an asset's metadata, you always need to assign an asset type to it first.

You can assign or an asset's **type** in two places in the CELUM Content application:

- In the upload basket after you have uploaded the asset
- In the asset list after you have assigned the asset to a node

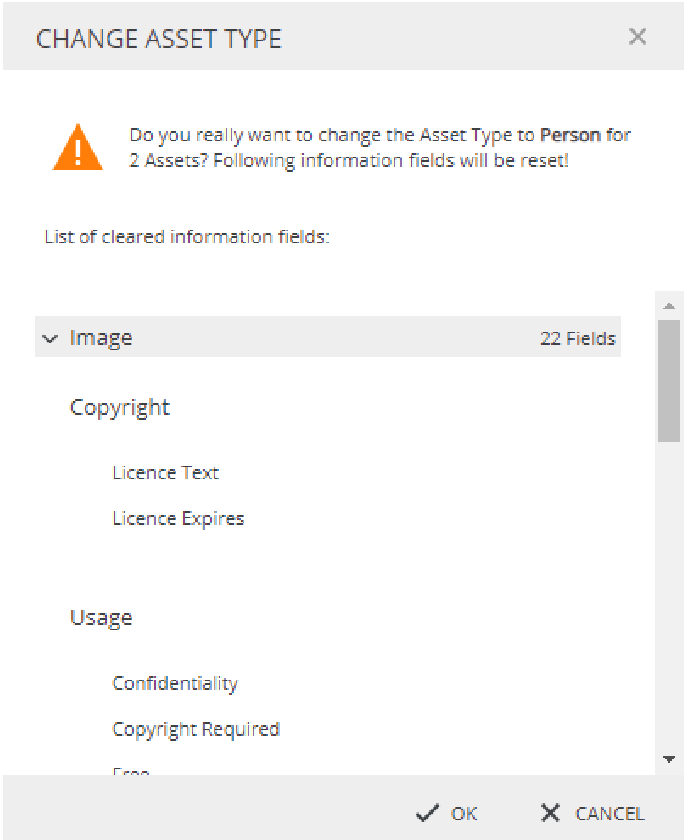
Set the asset type in the upload basket

If you intend to release the asset(s) to a **strict node**, you must set the asset type in the upload basket.

1. Select one or multiple assets in the upload basket.
2. Click the "Set asset type" menu entry in the context menu OR the respective button in the upload basket's toolbar. A new dialog opens.
3. Click one of the available types in the dialog to assign the asset type.
4. The selected assets have the new type and you can subsequently **edit the asset metadata**.

Set or change the asset type in the asset list

1. Select one or multiple assets in the asset list.
2. Click the "Set asset type" menu entry in the context menu. A new dialog opens.
3. Click one of the available types in the dialog to assign the asset type.
4. **If you are changing the asset type** to a different one, a new dialog opens and shows all fields in the old type that will be reset because they don't exist in the new type:



5. Click "OK" to confirm the removal of fields.
6. The selected assets have the new type and you can subsequently **edit the asset metadata**.

Restriction for changing the asset type

You cannot change the asset type for assets inside a **strict** node, because changing the asset type will likely result in empty required fields and assets inside strict nodes are not allowed to have empty required fields.

FAQ and troubleshooting

Why can I change the asset type for assets in some nodes but not in others?

The most likely explanation is that you cannot change the asset type for assets in **strict** nodes. Strict nodes do not allow their assets to have invalid information fields (e.g. required fields that are empty). If you change the asset type, there will probably be invalid fields, which prevents you from saving the asset metadata in strict nodes.

To work around this restriction, change the affected nodes' validation level to "Tolerant".

Can I remove an asset's type?

No, it is not possible to remove/unset an asset type from an asset once it was set for the first time, as this would mean losing all entered information field values irreversibly. You can only **change** the type.

Why is my uploaded assets' type set automatically?

If you only have permission to use one asset type, the type is set automatically during upload.

Edit asset metadata

Extensive **metadata** capabilities are one of CELUM Content's core functions. An asset's metadata consists of the following aspects:

- **Information fields**: Information fields are configured by a system administrator directly in the back-end of your CELUM Content server. They depend on your company's needs and requirements.
- **Asset properties**: asset properties are technical details about the asset's binary file. Examples include RAW-data, video data like bitrate and frame rate, or image data like color space and dimensions.
- **Asset properties**: Asset properties are automatically assigned to the asset during upload. Examples include the creation date, the creator or the name of the asset.

Of these types, you can only edit information fields in CELUM Content, because the other kinds are automatically set during upload. Information fields for assets are always bound to a specific **asset type**, which means in order to edit an asset's metadata, you always need to **set an asset type** for it first.

Information Fields are permission-dependent

On different nodes of the same type, you may have different local permissions. This influences which information fields you are allowed to see or edit for each asset.

Edit a single asset's metadata

You edit asset metadata in a special dialog called the "Edit Metadata dialog":

1. Either set an asset type for a selected asset or open the context menu and choose the "Edit metadata" menu entry for an asset to open the dialog.
2. Edit the asset's information fields. You can always reset the fields to their previous values with the ↶ icon next to each field. If you are editing a new asset, the icon resets the field to an empty value. If you are changing the field value, the icon resets the field to its previous value.
3. Confirm the changes with the "Finish" button.

Functionality notes

The dialog is separated into three areas: On the top is a **toolbar** which allows you to choose in which languages you want to enter localized information field values. You can display the field in two languages at the same time. On the left side, you can see the asset's preview in a **preview area**. On the right side, you can see and edit the asset's metadata in multiple

metadata tabs. Metadata tabs depend on your CELUM Content server's configuration, but by default, the following tabs are available for assets:

- The "General" tab is opened by default. It provides general information about the asset and allows you to change its name and availability.
- The "Usage" tab allows you to add copyright information to the selected asset.
- The "Content" tab allows you to add a description and categorize the selected asset with different keywords and categories.

The information fields in each metadata tab also depend on the configuration of your CELUM Content server. A technical administrator can add or remove fields from each tab.

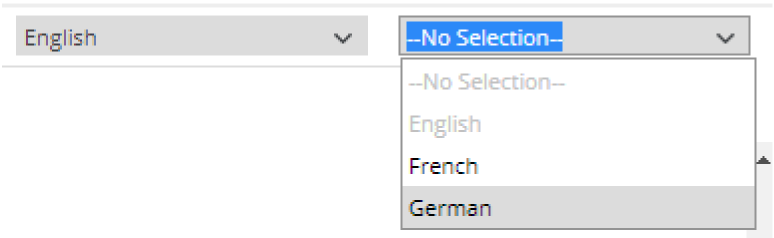
Edit multiple assets' metadata

1. Select multiple assets in the upload basket or asset list, open the context menu, and click "Edit metadata" or set an asset type for the selected assets to open the "Edit Metadata" dialog.
2. If you have selected **assets with different asset types**, you have to choose which of the assets you want to edit. You can either edit all assets with the same asset type, or all assets with the same editable information field set, but not assets which do not share at least one editable information field set.
3. The Edit Metadata dialog for multiple assets basically looks the same as for **single asset editing**, but instead of one preview on the left side of the dialog, you have a list of each selected asset's thumbnail. This view is called the "multi-edit mode".
    - If you want to apply information field changes to all selected assets, you can now make your changes and then save the dialog.
    - If you want to only apply some information field changes to all selected assets, but not all changes, then click on an asset's thumbnail to open the "single-edit mode". The chosen asset's preview is now shown bigger again and any information field changes you make in this mode are only applied to the currently selected asset.
4. Confirm the changes with "Finish" when you are done.

Add values in multiple languages

Along with normal text fields and text areas, the metadata may contain **localized** variants of such fields, which allow you to enter the field values in multiple languages. By default, only the application's default language is activated for each localized field (e.g. English).

In the "Edit Metadata" dialog's top toolbar, you can choose a second language in a drop-down:



You can also switch the default language (left drop-down) to a different language, but you can only view a maximum of two languages at a time.

FAQ and troubleshooting

Why do I get no options in some drop-down or node-referencing fields?

The most likely explanation for this behavior is that you do not have the **permission** to see the node which is referenced in the affected information field. Therefore, you cannot see its sub-nodes either and cannot choose a sub-node for the field. Instead, you see an empty list.

If you want to get permissions, talk to a power user who can give you the appropriate permissions.

Further actions

If you often use the same information field values for many assets, you can use **metadata templates** to expedite the metadata editing process.

Import asset metadata

Some **asset types** support embedding of file **metadata** (XMP or IPTC data) into specific information fields of the asset in CELUM Content.

To check if any assets which you uploaded into CELUM Content have imported metadata, you can edit their metadata in the upload basket (after you have assigned an asset type) and check if any of their information fields are already filled. These information field values were filled during the assignment of the asset type.

The exact metadata that are embedded with each asset type are decided by a **super-administrator**. As such a user, you can configure **inbound metadata mappings** which should be included in a specific asset type.

The **Administrator Guide** in the **Customer Knowledge Base** contains the instructions for this.

Reuse metadata with templates

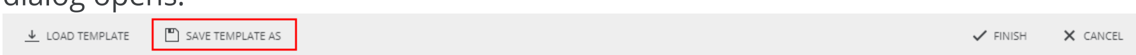
Your organization may have a lot of digital assets which belong, for example, to the same product group and therefore share some but not all of the same information field values. In order to apply all shared information field values across all matching assets with one click, you can use **metadata templates** in the Edit Metadata dialog.

Asset type of selected assets must match!

You can apply a metadata template either to a single asset or to multiple selected assets. The only prerequisite is that all selected assets must have the same asset type.

Create a metadata template

1. Select one or more assets of the same asset type in the asset list and open the context menu.
2. Click the "Edit" context menu entry. The Edit Metadata dialog opens.
3. Enter some values into the assets' information fields on the various metadata tabs.
4. In the dialog's footer, click the "Save template as" button on the left side. A new dialog opens.



5. Enter a name and optionally a description for the template.
6. Save the template.
7. Optionally save the Edit Metadata dialog in order to save the selected assets. Saving the current assets's metadata has no impact on the metadata template.

Apply a metadata template

Empty fields in a metadata template overwrite current values!

If a chosen metadata template contains empty values, these empty values will delete already filled information field values on the assets to which the template is applied. Therefore, be careful with applying metadata templates if you have already manually entered values into some fields.

1. Select one or more assets of the same asset type in the asset list and open the context menu.
2. Click the "Edit" context menu entry. The Edit Metadata dialog opens.

3. In the dialog's footer, click the "Load template" button on the left side. A new dialog opens.


4. The dialog lists all metadata templates which you can apply to the current asset selection.
5. Click an entry in the dialog. The dialog closes and the template's values are applied in the Edit Metadata dialog to all selected assets.

> You can only load templates if all selected assets have the same asset type. Additionally, you can only see your own templates in the dialog, not the templates that other users have created.

Delete a metadata template

Open the Metadata Template Overview dialog (via "Load template") and click the icon on the right side of a template entry. The template is immediately removed.

FAQ and troubleshooting

Why can't I access my metadata templates sometimes?

Metadata templates are only available for multiple selected assets if all assets have the same asset type. Please check if you have selected assets with different types. In that case, you cannot load any metadata templates for your selection.

Can I apply metadata templates to nodes as well?

Unfortunately, metadata templates are only available for assets, not for nodes.

Lock assets

In order to prevent unwanted modifications to assets, you can lock them. All locked assets are marked with the "Locked" 🔒 icon in the asset list.

Asset locking imposes certain **restrictions** on what actions other CELUM Content users can execute on a locked asset.

Implicitly lock assets

While you edit an asset's metadata, it is implicitly locked. This means other users cannot edit its metadata and accidentally overwrite your changes while you are editing.

An implicit lock is automatically removed once you save the Edit Metadata dialog.

Explicitly lock assets

1. Open the context menu on one or multiple assets in the asset list.
2. Click the "Lock Asset" menu entry. A new dialog opens.
3. Optionally enter a comment to explain why you locked the assets and click "Lock".
4. The dialog closes and no other users (except power users with super-administrator permissions) can edit the assets anymore.

View locking information

You can view an asset's locking information in the sidebar and detail view. The "Locking Status" information field set gives you the following information:

- The date when the lock was created
- The locking user
- The locking comment (if one was entered upon locking)

Unlock assets

You can only unlock all assets which you locked yourself (either explicitly or implicitly during metadata editing). Save and close the Edit Metadata dialog to remove an implicit lock, or open the context menu and click the "Unlock" menu entry to remove an explicit lock.

Restrictions of asset locking on various actions

- Only power users with super-administrator permissions can **forcibly unlock** an asset which was locked by another user.

- Only the locking user and power users with super-administrator permissions can **edit a locked asset's metadata**. These users must confirm a warning dialog before the Edit Metadata dialog opens.
- All users (with appropriate permissions) can still **delete locked assets**. The confirmation dialog tells you that the assets are locked.

Manage asset relations

Asset relations link two similar or otherwise related assets together. You can **see all related assets for a currently selected asset** in the "Asset Relation" detail view tab.

Depending on your CELUM Content server's configuration, there can be various **types** of relations with different prerequisites for creating them. Out-of-the-box, only the "Language variant" relation type is available and will be used as an example case in this topic.

Relations can also have different **statuses**, depending on the availability of the related asset:

Broken relations are relations that were established to a now deleted asset. If asset A is related to asset B and asset B is deleted, then the relation to it will be shown as broken in asset A's detail view. Broken relations are marked with the icon and the deleted asset's preview and name are removed from the detail view tab.

Relations with **outdated versions** are relations that were established to an earlier version of the related asset. If asset C is related to version 2 of asset D and asset D gets a new version (version 3), then the relation to it will be shown as outdated in asset C's detail view. In asset D's detail view, all established relations are removed, because relations are always tied to a specific asset version. Outdated versions are marked with the icon.

Create an asset relation

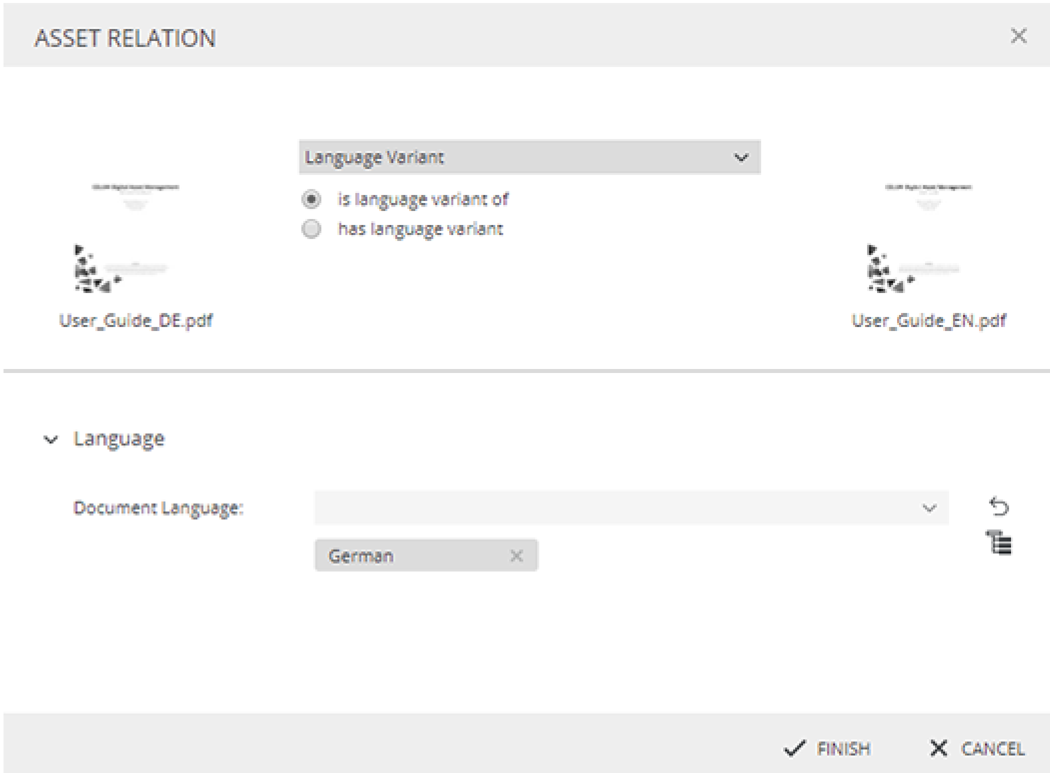
You create relations directly in the asset list:

1. Select an asset, for example the "User_Guide_EN.pdf" asset with ID 203.
2. Drag and drop the asset with your mouse onto another asset within the same node, for example the "User_Guide_DE.pdf" asset with ID 202. The Asset Relation dialog opens.

> To create a **relation with an asset in another node** or **main view tab**, drag and drop the asset to the **clipboard** first, then switch the node or tab and drag and drop the asset from the clipboard onto another asset.

3. In the top section of the Asset Relation dialog, you see the previews of the two affected assets on either side with information about the relation type and direction

between them:



4. Choose a **relation type** from the drop-down menu. In this example, the type is set to "Language Variant"
5. Choose the **relation direction**. In this example, the chosen direction reads as follows: "User_Guide_DE.pdf" (left asset preview) is language variant of "User_Guide_EN.pdf" (right asset preview).
6. Set the relation's **information fields**. In this example, there is only one optional field, but your custom relations may include other fields.
7. Save the dialog with "Finish".

In the related assets' "Asset Relation" detail view tab, you can **view the established relations**.

Delete an asset relation

Open the detail view for an asset and go to the "Asset Relation" tab.

1. Click the "Delete" button underneath the relation which you want to delete.
2. Confirm the deletion.

3. The relation is removed from the selected asset's and the (formerly) related asset's detail view tab.

The two assets which were related are not affected by this action at all. Just the relation between them is removed.

Fix outdated relations

As described in the **above explanation section**, a relation becomes outdated if one of the related assets gets a new version. There are two ways to fix outdated relations (marked with a ⚠):

- Remove the newest version of asset D or **make the related version current** again. This will validate the relation to asset D's previous version again.
- Delete the relation and reestablish it between the same assets. This will create a new relation to the current version of asset D.

FAQ and troubleshooting

Why are some relations shown as broken?

As described in the **above explanation section**, a relation becomes broken if one of the related assets is deleted. The target (or source) of the relation is no longer in the system, so the relation is broken on the remaining asset.

Why is a relation no longer shown in a related asset's detail view?

The most likely explanation is that one of the related assets got a new version. Relations are always established on specific asset versions, so when a new version is uploaded, the relation is not automatically established for that new version. So, the updated asset does not have the relation in its detail view anymore.

Why do I see the "No permission to view asset" error in the "Asset relation" tab?

You will see this error when you have no permission to view the currently selected asset's related asset. Another user probably created a relation between the selected asset and an asset in a different node for which you don't have the local "View assets" permission.

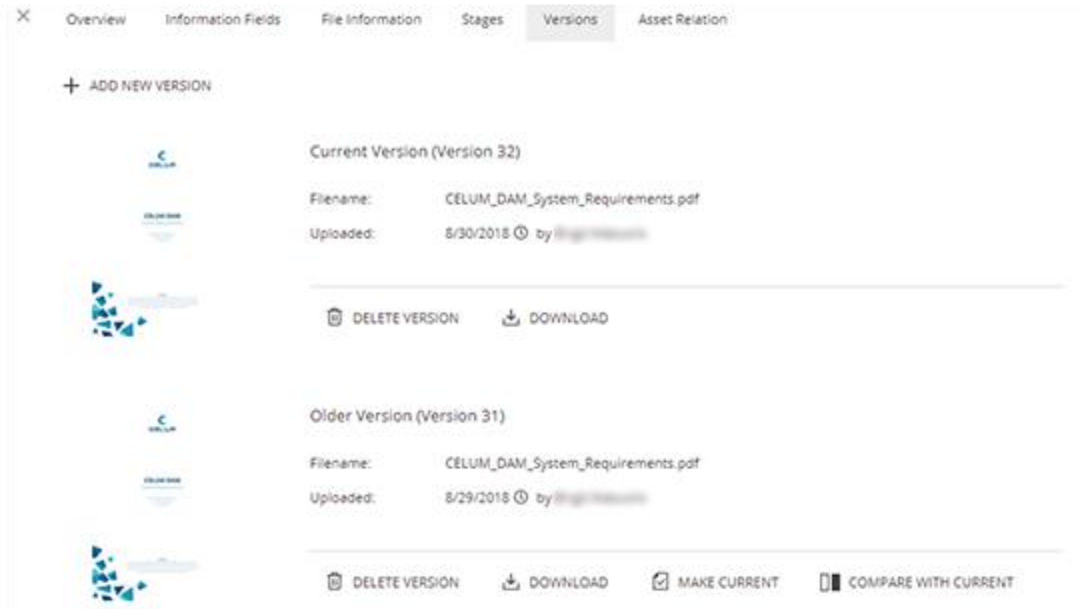
Can I edit or update an existing relation?

No, you cannot update an existing relation (change the relation's information fields, source, or target). You can only delete an existing relation and then create another one with different values.

Manage asset versions

New versions for particular assets can be created in a multitude of **indirect** ways, for example when you **edit the content of text assets**, or when a person adds a new version from CELUM Work.

However, you can only **directly** manage asset versions within the **"Versions" tab in the asset detail view**:



You need to have the **local permission** to **manage asset versions** on the currently selected node in order to add or remove asset versions and view the whole version history. Without this local permission, you can only see the current version and cannot manage versions.

Create a new version

1. At the top of the "Versions" detail view tab, click the "Add new version" button. An asset chooser dialog opens.
2. Pick an asset which you want to upload as a new version and confirm the dialog.
3. The new asset version is displayed at the top of the version history in the detail view tab and marked as "**current version**". The version number for the asset increases. The asset preview is refreshed to show the preview of the newest version.

Delete a version

Each entry in the "Versions" detail view tab has the "Delete version" button underneath its information. Click the button to delete the version.

Download an earlier version

Each entry in the "Versions" detail view tab has the "Download" button underneath its information. Click the button to download the asset in the version you want. This can be useful to highlight changes between two particular versions of an asset.

Change the current version

Each entry except for the newest (current) version in the "Versions" detail view tab has the "Make current" button underneath its information. This function allows you to reactivate an earlier version without having to delete the newest version. The reactivated version is then marked as "current version".

Compare the newest and an older version

Each entry except for the newest (current) version in the "Versions" detail view tab has the "Compare with current" button underneath its information. Click the button to open the **compare view** with the current version on the left side and the older version on the right side.

You can only compare an older version to the current version directly in CELUM Content. If you want to compare two older versions, **download** them both and compare them in your file system or **reactivate another older version** in order to compare it.

Edit asset content

Prerequisite permissions

In order to use this feature, you need to have the "Upload Asset" **global permission** and the "Add Asset Version" **local role-based permission**. If you cannot see the "Edit content" asset context menu entry, please contact a power user who can give you the permissions.

Besides **editing asset metadata** and **managing asset versions**, you can also **edit the content** of some assets, specifically of **text assets** whose source files have the file extension ".txt". You can do so directly within the CELUM Content application:

1. Select a text asset in the asset list and right-click it.
2. Choose the "Edit content" context menu entry. A new dialog opens and shows a text editor.
3. The editor offers different ways to **format the text**. You can also switch to a HTML view of the text. Additionally, you can **insert links** into the text and set options for them.
4. After you finish editing, save the dialog.
5. A new version is created for the text asset. You can view, compare and delete the version in the asset's detail view.

Format text in text assets

By default, the editor opens in rich text view. You can apply one of the following formats either before you start typing or by selecting existing text:

BIU	Style the text **bold**, *italic* or underlined.
Normal	Choose one of 6 heading sizes or the normal text size.
	Create either numbered or bullet lists. Nested lists can also be created.
	Remove all styling from the text.

The icon additionally allows you to switch from rich text to HTML editor.

Insert links into text assets

The icon allows you to turn selected text into a link. When you choose this option, a small input field for entering a URL appears.

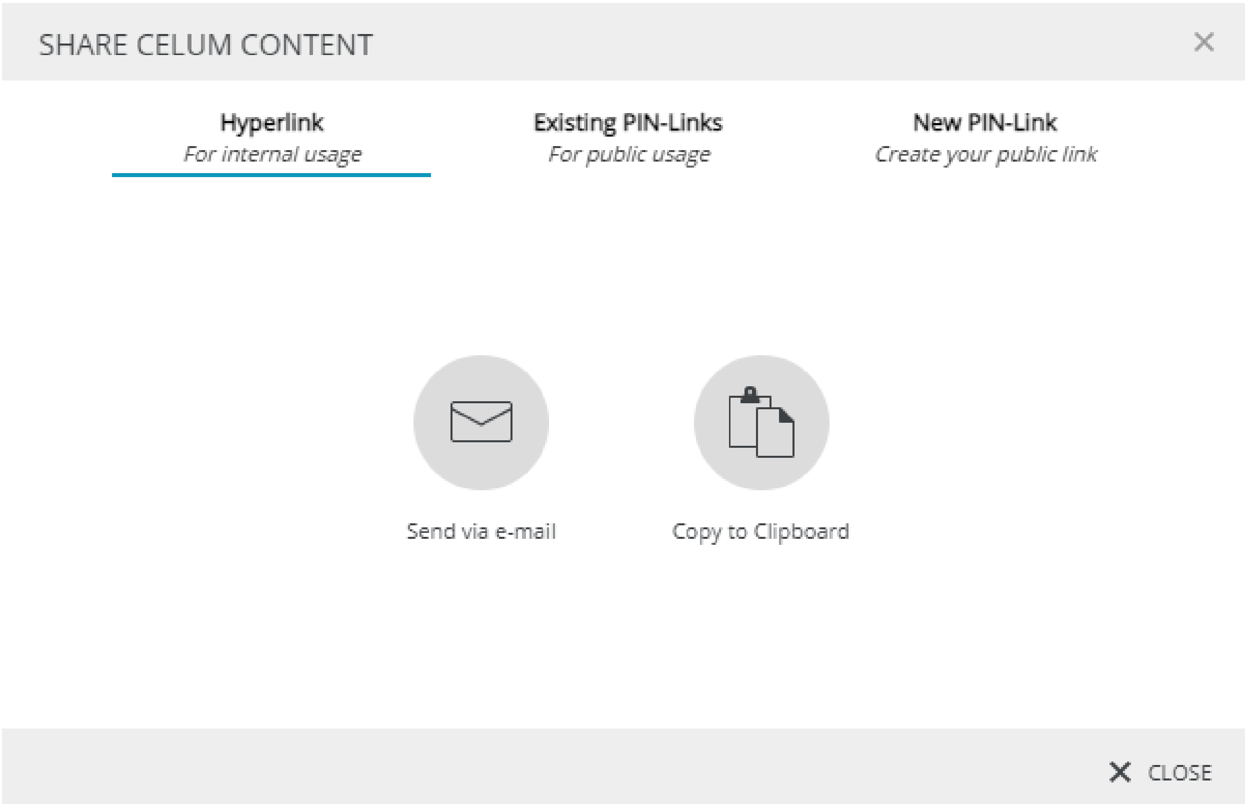
Always enter the URL **with protocol information** (e.g. http://<URL>), otherwise opening the link might not work properly.

When you select a link in the text again, you have the options to

- directly open the link,
- edit the link, or
- remove the link.

Share assets

The easiest ways of sharing assets with other people is in the **"Share" dialog**:



To open the "Share" dialog, click the **"Share" action** in the context menu for a selected asset. In the dialog, you have the following options for sharing your selected content:

- Share the content's internal **hyperlink**. You can use hyperlinks to share content with other CELUM Content users.
- Share an **existing external PIN-Link** for the current asset or **create a new one**. You can use PIN-Links to share content with people who don't have a CELUM Content user account.

Alternative ways to share:

With CELUM Content's powerful **Backstage** module, you can **publish assets on a variety of media platforms**. This happens outside of the "Share" dialog.

Share assets with other users

You can share dedicated **hyperlinks** for assets in CELUM Content:

1. Select one or multiple assets in the asset list.
2. Open the "Share" dialog for your selection.
3. By default, the "Hyperlink" dialog tab opens.
4. Copy the hyperlink(s) for the current selection via "Copy to Clipboard" or send it/them directly via e-mail.
5. If you choose to send it/them via e-mail, your operating system's e-mail client opens and automatically pastes the hyperlink(s) into the body of a new e-mail. A dedicated hyperlink is pasted for each selected asset.

> You can send internal hyperlinks to any CELUM Content user. However, the user must have the appropriate permissions in order to see the shared asset(s).
>
> People who do not have a CELUM Content account cannot open internal hyperlinks. Use **PIN-Links** for external sharing instead.

What happens when a direct hyperlink is opened?

If an asset's hyperlink is opened, it shows the **detail view** for the asset.

Share assets with external people

With CELUM Content's **PIN** and **Smart Views** functionalities, you can **share selected content for a specific period of time** with **other people** who do not have access to CELUM Content. This ensures that the people you make content available to can ONLY download the content you want them to have, when you want them to have it.

You need the local permission "Manage own PIN" on the selected content, otherwise you won't be able to use the PIN-Link function.

View and share an existing PIN-Link

1. Open the "Share" dialog for an asset.
2. Switch to the second tab ("Existing PIN-Links").
3. The second tab in the "Share" dialog shows you all existing PIN-Links for the selected asset. You can send each link via e-mail with or copy it to the clipboard with .

Permissions necessary for seeing others' PIN-Links

If you don't have the global permission "Administer PINs from other users", you can only see your own PIN-Links, not links created by other users.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the node where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

Create a basic PIN-Link

1. Open the "Share" dialog for an asset.
2. Switch to the third tab ("New PIN-Link").

3. Enter a name for the PIN-Link.
4. Optionally choose additional download formats which should be available.
5. Send the PIN-Link via e-mail or copy it to the clipboard.
6. The PIN-Link is automatically saved when you close the dialog.

Want to customize or edit a PIN-Link? Check how to create an **advanced PIN-Link** instead.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the node where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

Create an advanced PIN-Link

If a **basic PIN-Link** is not enough, you can either edit existing or create new PIN-Links with additional properties in the "Manage PIN-Codes" dialog.

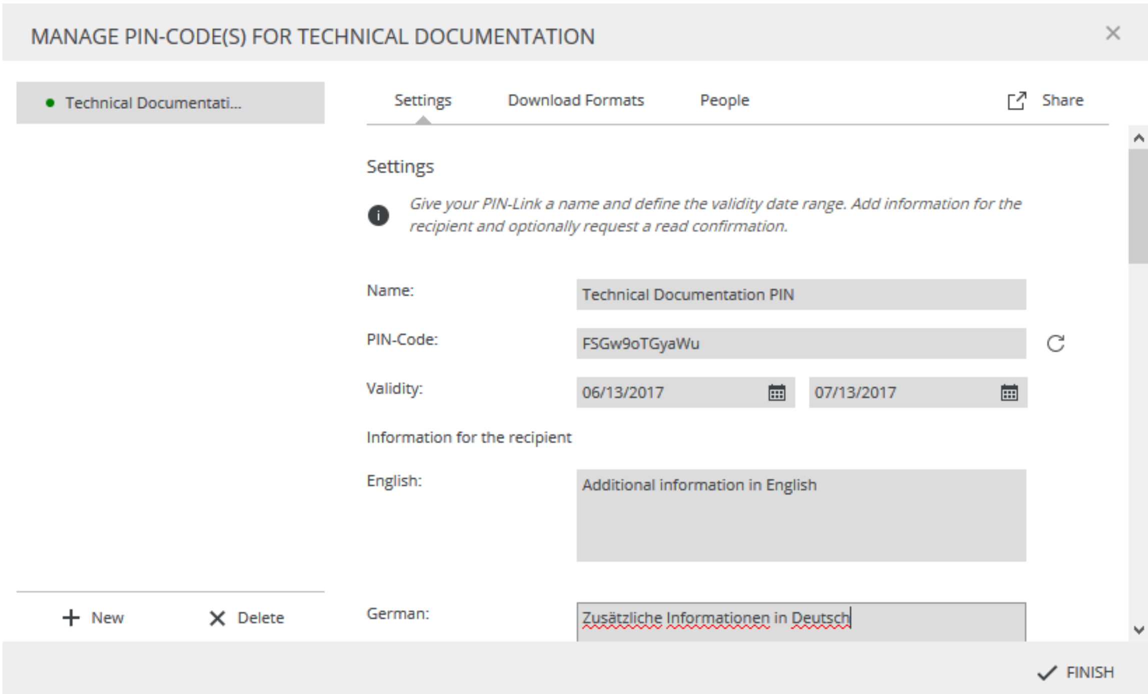
1. Open the dialog with one of the following options:
    - Open the "Share" dialog on an asset and click the icon next to an existing PIN-Link in the "Existing PIN-Links" tab.
    - Open the "Share" dialog on an asset and click the " Edit PIN" button in the "New PIN-Link" tab.
    - Open the context menu on an asset and choose the "Manage PIN-Code(s)" menu entry.
    - Open the sidebar on an asset with existing PIN-Links. In the sidebar "PIN Codes" section, you can view and edit each active PIN-Link.
2. The "Manage PIN-Codes" dialog looks as follows:

    On the top left side of the dialog, you will see a list of existing PIN-Links which you can select. If no PINs are available yet, you will see the text "No PIN-Codes" available".

On the bottom left side of the dialog, you can either **create a new** or **delete an existing** PIN-Link.

On the right side of the dialog, the configuration options for the selected PIN-Link are listed. You can easily switch between the sections with the tabs at the top of the dialog.

To share a selected PIN-Link, click "Share" in the top right corner.



3. Configure the link with the following advanced **settings**:
   - **Name**: Enter a name for the PIN-Link.
   - **PIN-Code**: Set the unique identifier for the PIN-Link. You can either generate the PIN-Code automatically with the button or manually enter a code.
   - **Validity**: Set the time period in which the PIN-Link is valid, i.e. in which recipients can download the content associated with it.
   - **Information for the recipient**: Enter information which is displayed to the recipient on the PIN-Link landing page. You can enter the information in all available UI languages.
   - **Confirm reading**: The recipients must check a box on the landing page that they have read the information.
4. Scroll down to the "**Download Formats**" section and choose one or multiple download formats for the content in the PIN, which determine the quality and size

of the downloaded assets. Keep in mind that not every associated asset can be downloaded in every chosen download format.

Other people can only download a PIN if the PIN has at least one download format assigned.

5. Scroll down to the "**People**" section and choose users or user groups that should be able to access and/or edit the PIN-Link you created.

Depending on which permissions you grant the users (**Edit** or **Read Only** permissions), they can either only see the PINs in the sidebar and view the detailed information in the dialog OR also edit or delete them.

Independent of permissions, the users can forward the PIN to other users.

6. Click the "Share" button in the top right corner of the dialog. The link is displayed in a pop-up.
7. You now have two options to share the link:
   - – Send via e-mail. This automatically opens your default e-mail program and pastes the link into a new mail.
   - – Copy to Clipboard. This copies the hyperlink and you can immediately paste it somewhere.

PIN availability is tied to the creator's permissions and status

Under the following circumstances, a PIN-Link will no longer be valid:

- The object(s) that the PIN-Link was created on were deleted
- The PIN-Link's creator user is no longer allowed to see the node where the PIN-Link was created
- The PIN-Link's creator user was deactivated or deleted

In these cases, recipients won't be able to download the PIN-Link's content anymore.

Share a Smart View

You can create Smart Views on nodes, but not on single assets. Find the instructions for creating and sharing smart views in **Share nodes with external people**.

Publish assets to media platforms

Nowadays, a lot of content is released by publishing it to a range of diverse media platforms. Normally, content has to be updated or deleted on these media platforms manually. With CELUM Content's "**Backstage**" module, you can fully automate the process of publishing, updating, and removing CELUM Content assets on media platforms.

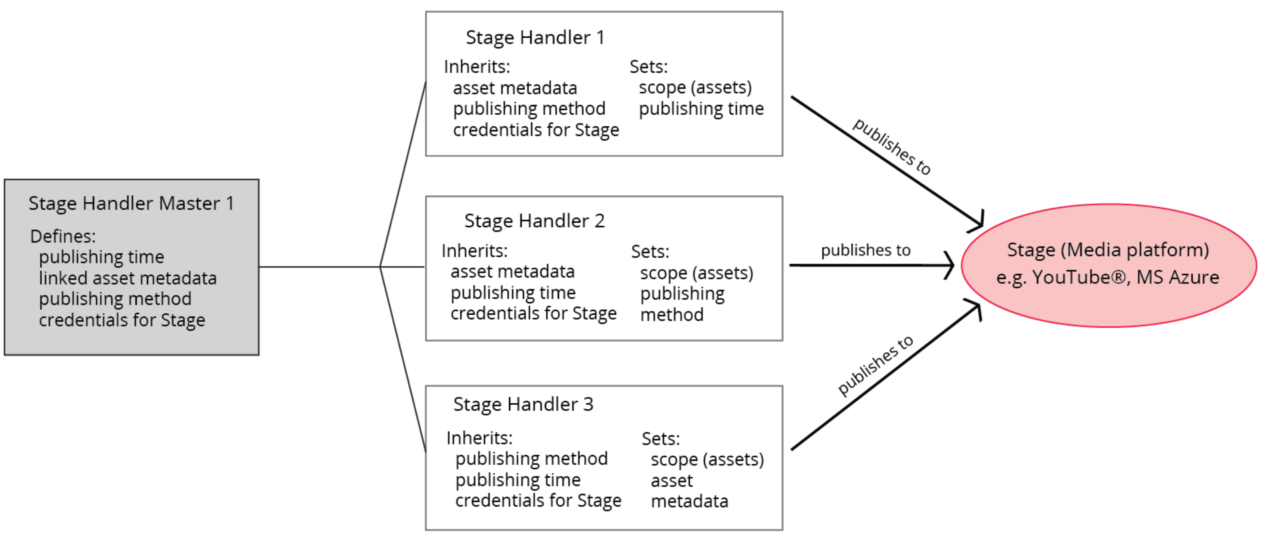
You can access the Backstage module in a dedicated **main view tab**. By default, the tab is called "Backstage", but it may have a different name on your CELUM Content server. With Backstage, you can publish assets and their metadata to different media platforms, which are called "**Stages**" in the context of this documentation.

The available Stages depend on **CELUM Content Backstage extensions**, which must be deployed on your CELUM Content server. If no Backstage extensions are deployed, you can still see the "Backstage" main view tab, but you cannot publish assets to any Stages.

Introduction to Backstage

For every Stage (media platform), you create one or multiple "**Stage Handlers**", which define the set of assets ("**scope**") and the metadata which gets published to the Stage at a time. For every Stage Handler, you can decide when and for how long the included assets should be published. You can also update the assets within a Stage Handler automatically on the Stage when they are changed in CELUM Content (e.g. if a new version is uploaded).

If you often publish Stage Handlers with the same properties (e.g. the same assets with different metadata or different assets to the same Stage account), you can use a "**Stage Handler Master**" as a template to set up multiple Stage Handlers with the same properties. The Stage Handler Master acts as a template for Stage Handlers, which can inherit properties from the Stage Handler Master.



The Backstage main view tab has the same layout as other main view tabs. However, instead of the navigation tree, the **left side** contains a list of all available Stages and existing Stage Handler Masters for each Stage. You can identify the Stage Handler Masters by their icon . The **right side** contains two tabs:

- **Stage Handler**: A list of available Stage Handlers within a selected Stage Handler Master or within the selected Stage. You can identify Stage Handlers by their icon.
- **Settings**: The configuration area for a selected Stage Handler or Stage Handler Master.

Create a new Stage Handler Master

Normally, you start by creating a Stage Handler Master for a fresh Stage:

1. Click on the "New" button in the active menu. A dialog opens and you can choose the Stage which you want to create the handler for.
2. Click "Create new Stage Handler Master" to create a new Stage Handler Master.

> Alternatively, you can choose an existing Stage Handler Master to immediately **create a new Stage Handler** in it.

3. The "Settings" tab now shows a lot of fields to configure the Stage Handler Master. Required fields are marked by an asterisk (*). You can leave optional fields empty for now and fill them later for each individual Stage Handler. The first field set is independent of the Stage and always contains the same fields:
   - **Name**: Enter the name of the Stage Handler Master
   - **Description**: Enter an optional description.
   - **Trigger**: Choose the publishing method for the Stage Handlers inside the Stage Handler Master. You can choose between manual or repeated automatic publishing.

> All other fields in the Stage Handler Master depend on the currently chosen Stage. Most fields have various **input modes** which allow you to connect field values to asset metadata.

4. Click "Save changes" to finish the configuration process. You can always change the Stage Handler Master's settings later.

5. After you saved the Stage Handler Master, you can choose to immediately **create a Stage Handler** in the master. Click "Yes" if you want to proceed.

Input modes

Button	Name	Function
	Inherited from Stage Handler Master	This option is available in the Stage Handler configuration. Select this option to transfer the values or mappings of a field from the Stage Handler Master to the Stage Handler.
	User input	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to manually enter data into a field.
	Linked to Metadata	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to link a field's value to an asset's information field value.
	Linked to file property	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to link a field's value to file properties that have been retrieved for an asset in the system.

Create a new Stage Handler

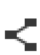
1. Click on the "New" button in the active menu. A dialog opens and you can choose the Stage which you want to create the handler for.
2. Choose an existing Stage Handler Master which you want to create the Stage Handler in.

3. The "Settings" tab now shows a lot of fields to configure the Stage Handler. Required fields are marked by an asterisk (*). The first field set is independent of the Stage and always contains the same fields:
   - **Name**: Enter the name of the Stage Handler.
   - **Trigger**: Choose the publishing method for the Stage Handler. You can choose between manual or repeated automatic publishing.
   - **Scope**: Choose the parent nodes whose assets you want to publish. You can add multiple nodes of different types.
   - **Recursive**: Check this box to publish all assets underneath the chosen nodes' structure, i.e. also assets in sub-nodes.

All other fields in the Stage Handler depend on the currently chosen Stage. Most fields have various **input modes** which allow you to connect field values to asset metadata.

4. Save the changes. We also recommend that you test the connection to the Stage (e.g. the YouTube account used) with the "Test connection" button.
5. Next, you can start **publishing** the Stage Handler.

Input modes

Button	Name	Function
	Inherited from Stage Handler Master	This option is available in the Stage Handler configuration. Select this option to transfer the values or mappings of a field from the Stage Handler Master to the Stage Handler.
	User input	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to manually enter data into a field.
	Linked to Metadata	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to

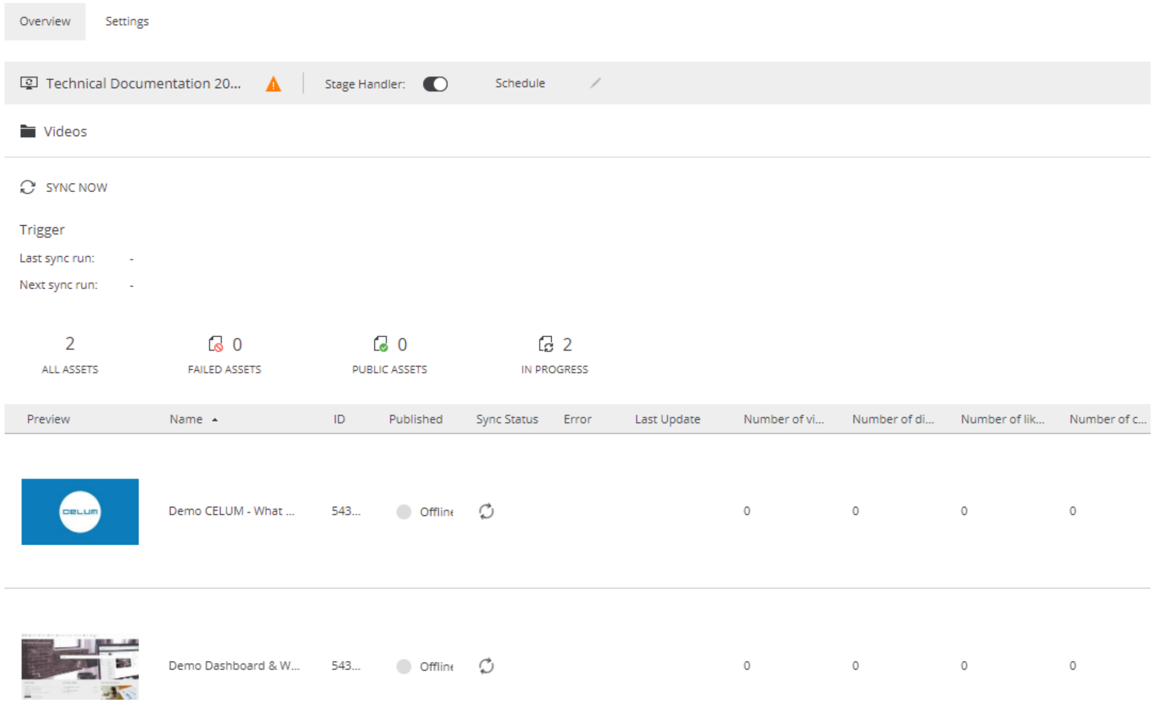
		link a field's value to an asset's information field value.
	Linked to file property	This option is available in the Stage Handler Master and Stage Handler configuration. Select this option to link a field's value to file properties that have been retrieved for an asset in the system.

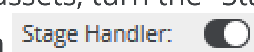
Synchronize a Stage Handler

Select a Stage Handler Master and subsequently a Stage Handler in the "Stage Handler" tab. You can then **synchronize** a Stage Handler from the list in order to publish or remove its assets:

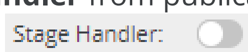
- Automatically run all Stage Handlers within the selected Stage Handler Master with the "Sync all now" button. It depends on each handler's current status if the assets are uploaded to or removed from the Stage.
- Double-click a Stage Handler to open it and run it manually or **schedule its publication**. This opens the Stage Handler's **overview.** The overview shows the Stage Handler's name and information, as well as all included assets and their

status:



To **publish or update a Stage Handler** and all its assets, turn the "Stage Handler" toggle button in the handler's title bar to the "on" position 

and click the "Sync now" button. The assets are uploaded to the Stage.

To **withdraw a Stage Handler** from publication, turn the "Stage Handler" toggle button back to the "off" position 

and click the "Sync now" button again. The assets are removed from the Stage.

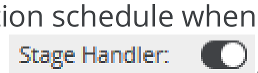
To **cancel** a Stage Handler's synchronization, click "Cancel".

During each synchronization (either publication or removal of the assets), the Stage Handler's title bar shows the **synchronization status of the handler** and the asset list shows the **synchronization status for each asset**:

Icon	Meaning
	Shown for each asset in the "Sync Status" column if the publication or removal of the asset was not successful. In this case, an error message is also displayed in the "Error" column. Shown in the Stage Handler's title bar if the whole handler's synchronization could not be triggered, probably due to a configuration error in the settings.

	Shown for each asset in the "Sync Status" column if the publication or removal of the asset was successful. Shown in the Stage Handler's title bar if the whole handler was synchronized successfully (no errors occurred and all assets are synchronized).
	Shown in the Stage Handler's title bar if the handler was synchronized, but at least one asset was not synchronized successfully.
	Shown in the Stage Handler's title bar directly after you triggered the synchronization. The synchronization is queued but has not started yet.
	Shown for each asset in the "Sync Status" column while the publication or removal of the asset is running. Shown in the Stage Handler's title bar during synchronization of the handler.
	Shown in the Stage Handler's title bar if the synchronization was cancelled.
	Shown for each asset in the "Published" column if the asset was successfully published to the Stage.
	Shown for each asset in the "Published" column if the asset was successfully removed from the Stage.

Schedule a stage handler for publication

You can either enter a publication schedule whenever you turn a the "Stage Handler" toggle button of a Stage Handler "on" 

, or before any subsequent synchronizations with the "Schedule" button in the Stage Handler's title bar.

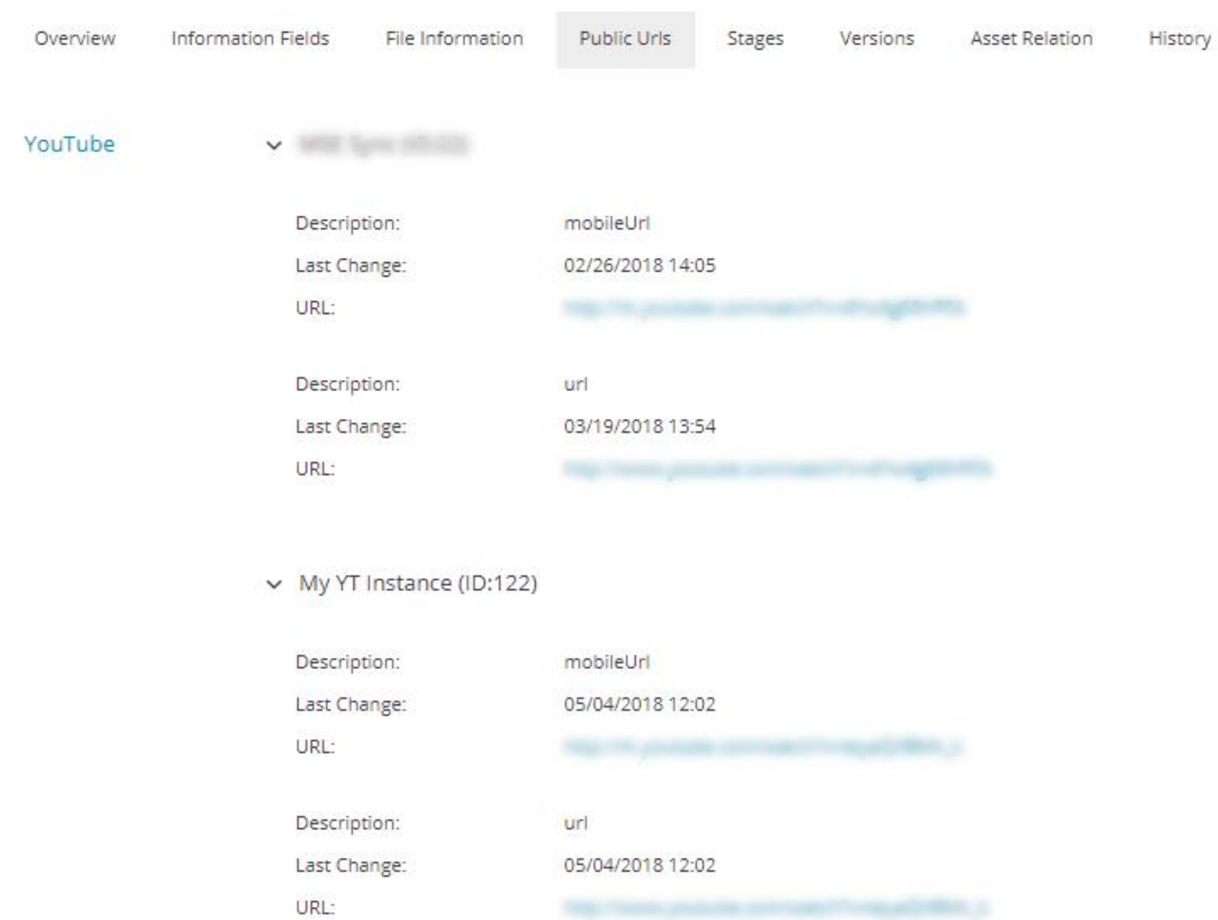
Whenever you turn a Stage Handler's "Stage Handler" button on or click the "Schedule" button, a dialog appears. Check the "Publication schedule" box in the dialog and choose a start and end date and time. During the chosen time period, the Stage Handler's assets will be published on the Stage. They will then be removed and the Stage Handler will be taken offline. You can choose just a start date, which means the assets will be published indefinitely (or until you take the handler offline) after that date, or just an end date, which means the assets will be published immediately, but taken offline automatically at the end date.

View an asset's public URLs and status

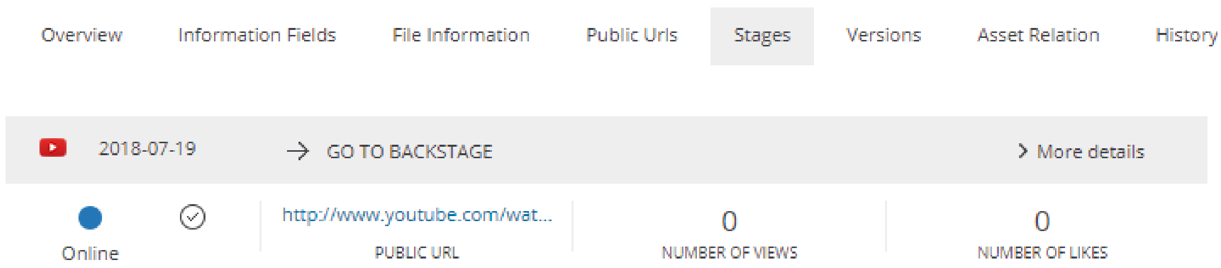
Outside of the "Backstage" main view tab, you can also see an asset's publication status (online or offline) in the asset's **detail view** when you navigate to the asset.

The "Public URLs" detail view tab shows you all public references of the selected asset. Public URLs are created by all CELUM Backstage connectors (MovingImage, MS Azure, Webserver and YouTube connector) as well as some other CELUM Content product extensions. Public URLs provide direct links to assets on distribution and media platforms like public web servers, Backstage Stages, or CDNs.
The public URLs are organized by the **provider** (e.g. the different Stages) on the left, and by **instance** and **URL type** on the right. The screenshot shows the example of **provider** "YouTube" (a Backstage Stage) with two **instances** (Stage Handlers). Each instance delivers two public URLs with the "standard" and "mobile" **type**.

Click on a public URL to open the link in a new browser tab.



The "Stages" detail view tab shows you a list of each Stage Handler which the selected asset is published with. For each Stage Handler, you can see if the asset is online or offline and if the last synchronization was successful or has failed. You can open the public URL or jump directly to the Backstage main view tab. Click "More details" to see statistics about the asset on the Stage.



Concrete stage handler information

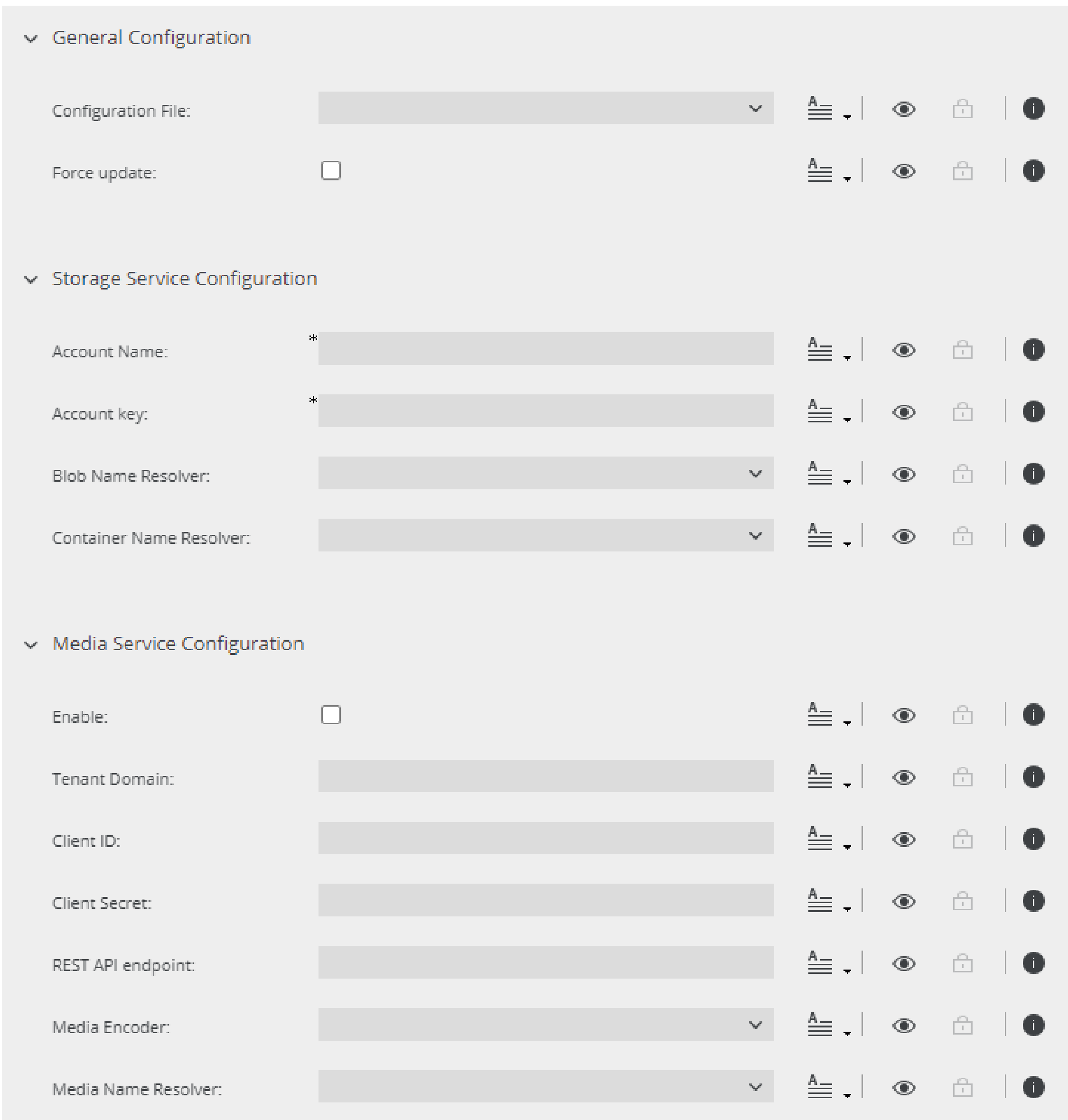
The following articles provide stage-specific information for the stage handler creation process:

- **Stage handler settings for MS Azure**
- **Stage handler settings for web server**
- **Stage handler settings for movingimage**
- **Stage handler settings for YouTube**

Stage handler settings for MS Azure

This article contains an overview of the different stage handler settings for an MS Azure stage handler:

The section "General" is available for every stage and therefore excluded from the screenshot. It contains fields for the **Name** and **Trigger** mechanism of the stage handler, as well as the "Scope", which determines which assets will be published. With the "**Recursive**" checkbox, you can ensure that assets from sub-nodes of the chosen "*Scope*" node will also be published.



In order for the stage handler configuration to be successful, the **"backstage-azure" product extension** must be correctly installed and configured on your system.

You can find the installation instructions for the Azure Connector in the **Customer Knowledge Base**.

General Configuration

In the "General Configuration" section of the Stage Handler Configuration, you can select one of the XML files that was configured as explained in the Customer Knowledge Base. If you created only one of these files, only that file will show up in the "*Configuration File*" drop-down field.

Additionally, you can decide if you want to update all Assets in the sync scope regardless if they were changed or not with the checkbox "*Force update*".

Storage Service Configuration

In the "Storage Service Configuration" section, you need to paste your *MS Azure Storage Service account name* and *access key*. Besides that, you need to select the "*Blob Name Resolver*" and the "*Container Name Resolver*" from the drop-down fields.

Selecting the "*Azure Blob File Name plus Extension Resolver*" as Blob Name Resolver requires setting additional configuration options in *custom.properties* for each mapped download format that is not the Original Download Format, e.g.

```
azure.downloadFormatMapping.8=PNG
```

where "8" is the numeric download format ID and "PNG" is the file extension that is delivered by the download format.

If you do not have any custom resolver, only the Default Resolver will show up in this list.

Information about how you can implement custom resolvers is provided in the "*Custom Resolver*" chapter in the **Customer Knowledge Base**.

Media Service Configuration

In the "Media Service Configuration" section, you can decide if you want to use the MS Azure Media Service in addition to the Storage Service with the checkbox "*Enable*". If you check the checkbox, the following other fields become editable in the section:

- **Tenant Domain**: Your MS Azure Media Service Active Directory Tenant Domain.
- **Client ID**: Your MS Azure Media Service auto-generated client ID.
- **Client Secret**: Your MS Azure Media Service auto-generated client secret.

To find out how you can generate a client ID and client secret, go to the official MS Azure documentation: **https://docs.microsoft.com/en-us/azure/media-services/media-services-portal-get-started-with-aad**

- **REST API Endpoint**: Your MS Azure Media Service REST Endpoint.
- **Media Encoder**: Select which Media Encoder you want to use for this Stage. The available values depend on the encoders that were configured in the chosen Configuration File.
- **Media Name Resolver**: Select which Media Name Resolver you want to use for this Stage. If you do not have any custom resolver, only the Default Media Filename Resolver will show up in this list.

You can find more information about custom resolvers in the "*Custom Resolver*" chapter in the **Customer Knowledge Base**.

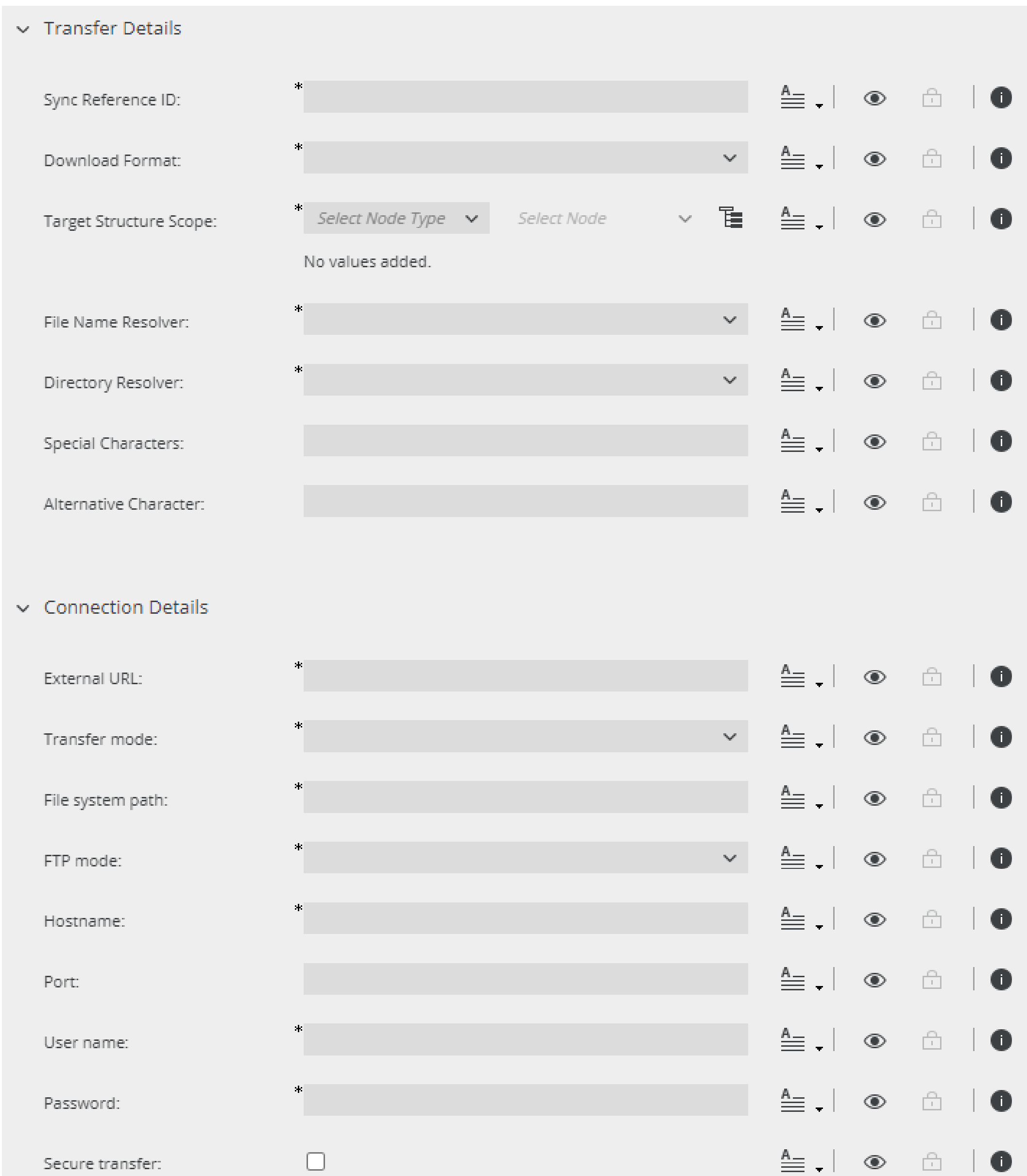
If you disable the Media Service after a successful synchronization, you will receive an error message on the next sync because of missing credentials. However, the videos still remain on the Media Service. In this case we recommend that you manually remove the Assets from the Media Service.

Please see chapter "*Functionality Notes*" in the **Customer Knowledge Base** for more information.

Stage handler settings for web server

This article contains an overview of the different stage handler settings for a Webserver stage handler:

The section "General" is available for every stage and therefore excluded from the screenshot. It contains fields for the **Name** and **Trigger** mechanism of the stage handler, as well as the "Scope", which determines which assets will be published. With the "**Recursive**" checkbox, you can ensure that assets from sub-nodes of the chosen "*Scope*" node will also be published.



In order for the stage handler configuration to be successful, the **"backstage-webserver" product extension** must be correctly installed and configured on your system.

You can find the installation instructions for the Webserver Connector in the **Customer Knowledge Base**.

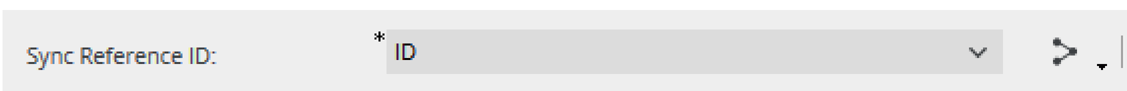
Transfer Details

In the "Transfer Details" section, you define important details for saving the synchronized assets to a structure on a web server.

- **Sync Reference ID**: This required field is needed to uniquely identify the assets that should be synchronized inside the scope. Additionally, it determines the name of each synchronized asset's direct parent directory on the web server. It is primarily needed for synchronizing to a **portals server** and is only evaluated if you choose the *Portals Directory Resolver*, but you must not leave it empty.

Link field to "ID" metadata

CELUM advises that you link this field to the "ID" metadata field, which means that each synchronized Asset is saved to a directory named after its ID. Be sure to use the field input mode "Link to metadata" and choose the entry "ID" from the drop-down:



- **Download Format**: Determines the format that synchronized assets will be converted to during upload to the web server.
- **Target Structure Scope**: As opposed to the "*Scope*" field in the "General" section, which determines the **assets** that get published, this field determines the **folder structure** that the assets will be saved into on the webserver. All chosen nodes and their sub-nodes will be created as folders on the web server.

CELUM recommends that you always set the **same value** for the *target structure scope* as for the *scope*, in order to accurately recreate the CELUM Content node structure and its assets on the web server.

Behavior annotations

- If you **rename a node in the scope**, the folder with the original name stays on the web server and a new folder with the new name is created additonally. The folder with the original name is emptied.
- If the assets or nodes in the scope contain certain **special characters** in their names (e.g. characters from other characters sets, like Cyrillic, Arabic or Chinese), the files and folders may not be removed properly when you unpublish the stage handler.

- **File Name Resolver**: Determines how the synchronized assets are named on the web server. There are various resolvers available of of the box:
  - *AssetNameResolver*: Published assets are named after their asset name in CELUM Content.
  - *AssetNameWithIdResolver*: Published assets are named in the pattern <asset name>_<asset ID>.
  - *OriginalFileNameResolver*: Published assets are named after their original file name.
  - *PortalsFileNameResolver*: Published assets are named with a generated UUID which is needed for a sync to a **portals server**.

This option is only available if you have a CELUM Portals Connector in version 6.1 or higher configured on your system.

- **Directory Resolver**: Determines which **folder structure** is created on the web server. There are two resolvers available out of the box:
  - *NodePathDirectoryResolver*: In connection with the *Target Structure Scope* field, this resolver causes the node structure(s) specified in the *Target Scope* to be recreated on the web server. Be aware that nodes are not recreated on the web server, unless they contain full sub-nodes.
  - *PortalsDirectoryResolver*: This resolver works independently of the *Target Structure Scope* field and automatically saves each synchronized asset to a folder named after the value of the *Sync Reference ID* on the web server. It is primarily needed for a sync to a **portals server**.

This option is only available if you have a CELUM Portals Connector in version 6.1 or higher configured on your system.

- **Special Characters**: Specify special characters that should be replaced in node and asset names in case they are not supported by the web server's operating system. The characters need no spaces or delimiters between them.
- **Alternative Characters**: Specify a single character that will be used to replace the special characters.

> If you do not specify any special characters or alternative characters, the synchronization of assets or nodes with unsupported characters in the name may fail or produce unexpected results on the web server.

> Information about how you can implement custom resolvers is provided in the "*Webserver Connector Developer How-To: Custom Resolver*" chapter in the **Customer Knowledge Base**.

Connection Details

The field set "Connection Details" holds all fields you need to specify the connection to a web server you want to synchronize to.

With the Webserver Connector, you can synchronize assets to

- a file system/HTTP server
- or an FTP server.

In the field "*Transfer mode*" you can specify which of the two systems you want to sync to. The field "*External URL*" is needed for both transfer modes and needs to include the **protocol**. The other fields in the field set are dependent on the *Transfer mode*.

Synchronize to a file system

If you want to synchronize to your local file system, you need the following settings on your handler:

1. Choose *File* from the "*Transfer mode*" drop-down.
2. In the field "*External URL*" you need to specify the URL to the sync directory along **with the** *file:///* **protocol**. Inside the sync-directory, the CELUM Content folder structure from the *Target Structure Scope* will be created.
   Example for sync to local folder on your CELUM Content server: *file:///<absolute/path/to/the/sync-directory>*, e.g. *file:///C:/Webserver/sync/*
3. In the field "*File system path*" you need to specify the path to the sync-directory **without the protocol**.
   Example for sync to local folder: *<absolute/path/to/the/parent/sync-directory>*, e.g. *C:\Webserver\sync*

Sync directory will be automatically created

You don't need to create the sync directory on the server manually. Just adding it to *External URL* and *File system path* will create it during synchronization if it doesn't exist yet.

The exact structure on the web server depends on your *Scope* and *Target Structure Scope*, as well as the resolvers you used.

'Write' permissions required

In order to be able to publish to a web server, make sure you have **Write permissions** on the sync directory, otherwise you won't be able to synchronize.

Synchronize to an FTP/sFTP server

If you want to synchronize to an FTP or sFTP server, you need the following settings on your handler:

1. Choose *FTP* from the "*Transfer Mode*" drop-down.
2. In the field "*External URL*" you need to specify the URL to the sync directory of your web server **with protocol (http://, ftp:// or sftp://)**.
   Example 1: *http://<server URL>/path/to/the/sync/directory/*
   Example 2: *ftp://<server URL>/path/to/the/sync/directory/*
   Example 3: *sftp://<server URL>/path/to/the/sync/directory/*
3. In the field "*FTP mode*", you need to specify either *active* or *passive* mode.

Active FTP mode is recommended for Secure Transfer.

4. In the field "*Hostname*" you need to specify the URL to the sync directory of your web server **without protocol**.
   Example: *<server URL>/path/to/the/sync/directory/*
5. Enter your FTP server's *user name* and *password* in the respective fields.
6. If you are synching to an sFTP server, check the "*Secure Transfer*" checkbox.

Sync directory will be automatically created

You don't need to create the sync directory on the server manually. Just adding it to *External URL* and *Hostname* will create it during synchronization if it doesn't exist yet.

The exact structure on the web server depends on your *Scope* and *Target Structure Scope*, as well as the resolvers you used.

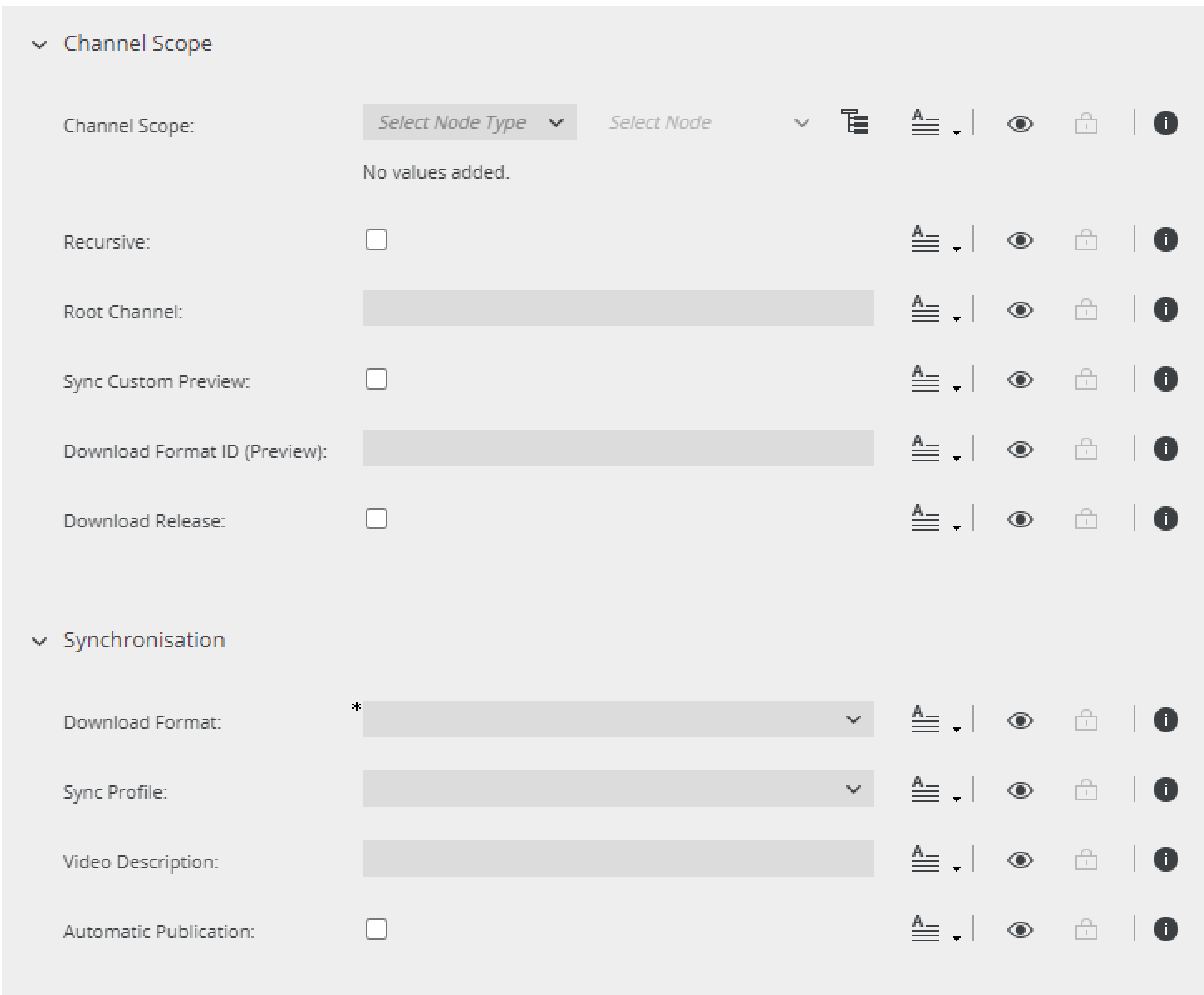
'Write' permissions required

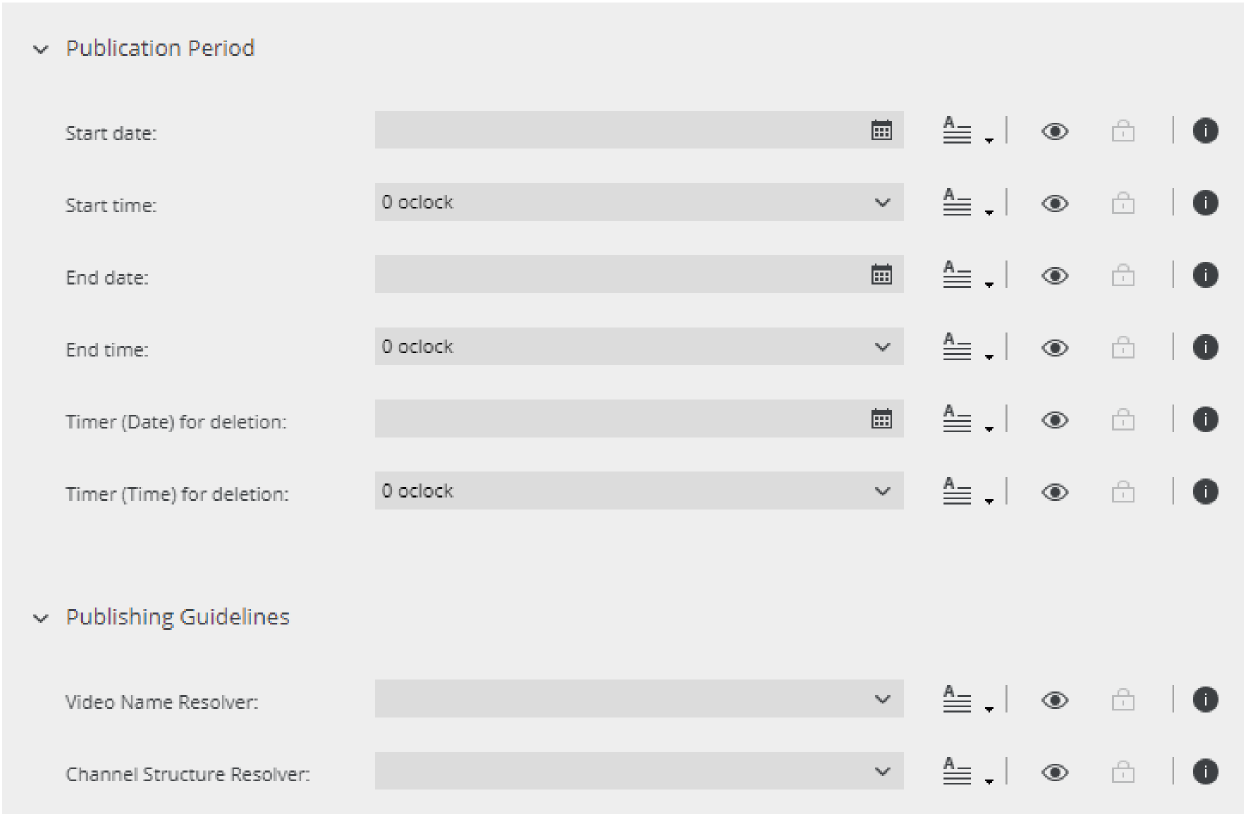
In order to be able to publish to a web server, make sure you have **Write permissions** on the sync directory, otherwise you won't be able to synchronize.

Stage handler settings for movingimage

This article contains an overview of the different stage handler settings for a movingimage stage handler. movingimage (or movingimage24) is an Enterprise video platform.

The section "General" is available for every stage and therefore excluded from the screenshot. It contains fields for the **Name** and **Trigger** mechanism of the stage handler, as well as the "Scope", which determines which assets will be published. With the "**Recursive**" checkbox, you can ensure that assets from sub-nodes of the chosen "*Scope*" node will also be published.





In order for the stage handler configuration to be successful, the **"mi24-all" product extension** must be correctly installed and configured on your system.

You can find the installation instructions for the movingimage Connector in the **Customer Knowledge Base**.

Channel Scope

In the "Channel Scope" section, you determine which channel structures should be created on movingimage.

- **Channel Scope**: As opposed to the "*Scope*" field in the "General" section, which determines the assets that get published, this field determines which node structure(s) will be reflected on movingimage. All sub-nodes of the node(s) you specify here will be represented by their own **channel** in movingimage.

Behavior annotations

- For empty sub-nodes of the specified *Channel Scope* node, no channels will be created.

- For the *Channel Scope* node itself, no channel will be created. Assets located inside that node will be synchronized to "**All Videos**" on movingimage and can be accessed there.
- If assets are **moved** from one *Scope* node to another, the synchronized assets will be moved accordingly between channels on movingimage when the next sync is executed.
- If nodes within the *Channel Scope* are **renamed or moved** in CELUM Content, the corresponding channels on movingimage will NOT be renamed/moved. Instead, new channels will be created to reflect the changes.
- When you unpublish a stage handler from movingimage, only the assets are removed. The created channels remain on movingimage with no assets.

- **Recursive**: Determines whether the chosen node structure underneath the *Channel Scope* node should be recreated as a channel structure recursively (including all sub-nodes on all levels).
- **Root Channel**: In addition to the *Channel Scope*, you can specify an existing movingimage channel under which all channels that are synced will be created on movingimage. If you leave this field empty, the synced channels will be created on root-level on movingimage .
- **Sync Custom Preview**: Determines whether the video preview image which was defined in CELUM Content should also be synchronized and displayed on movingimage. If you check this check box, it is recommended that you also enter a valid Download Format ID in the field "*Download Format ID (Preview)*". If you do not specify an ID, you will get a warning message and the preview won't be synchronized correctly.
- **Download Format ID (Preview)**: Specify the ID of a download format to which the preview image should be converted on upload.

The chosen download format must use the "Download Preview" process. A super-administrator with access to the Configuration Management Application can give you a suitable ID.

- **Download Release**: Determines whether the videos published with this stage handler should be downloadable from movingimage.

Synchronization

The "Synchronization" section contains fields that govern the synchronization behavior.

- **Download Format**: Determines the format that synchronized assets will be converted to during upload to movingimage.
- **Sync Profile**: Choose one of the movingimage profiles that are defined in the Configuration Management Application. The profile contains the movingimage user account that should be used for uploading the videos.

> The instructions for creating a *Sync Profile* in the CMA can be found in the **Customer Knowledge Base**.

- **Video Description**: Specify the description that should be displayed on movingimage for the uploaded assets.
- **Automatic Publication**: Determines whether the uploaded asset should also be published on movingimage directly after upload. If this checkbox is checked, the fields in the "Publication Period" section become editable.

Publication Period

The fields in the "Publication Period" section will only be taken into account if the "*Automatic Publication*" checkbox in the "Synchronization" section is activated. The section contains date and time fields to control the publication schedule:

- **Start date**: Defines the date when the uploaded assets should be published on movingimage. You can use a date picker to select a date.
- **Start time**: Defines the exact time when the uploaded assets should be published. You can choose a fixed hour a which publication will start.
- **End date**: Defines the date when the uploaded assets should be unpublished from movingimage. You can use a date picker to select a date.
- **End time**: Defines the exact time when the uploaded assets should be unpublished. You can choose a fixed hour at which publication will end.
- **Date for deletion**: Defines the date when the uploaded assets should be deleted from movingimage. You can use a date picker to select a date.
- **Time for deletion**: Defines the exact time when the uploaded assets should be deleted. You can choose a fixed hour at which publication will end.

Publishing Guidelines

In the "Publishing Guidelines" section, you set the name resolvers for assets and channels that get synchronized to movingimage.

- **Video Name Resolver**: Specify the naming of the synchronized Assets in movingimage . The value "*Default Name Resolver*", which is available out-of-the-box, causes the synchronized videos to be named like the asset name in CELUM Content.
- **Channel Resolver**: Specify the naming of the Channels that are created in movingimage . The value "*Default Channel Resolver*", which is available out-of-the-box, causes the created channels to be named like the corresponding CELUM Content nodes.

Information about how you can implement custom resolvers is provided in the "*movingimage Developer How-To: Custom Resolver*" chapter in the **Customer Knowledge Base**.

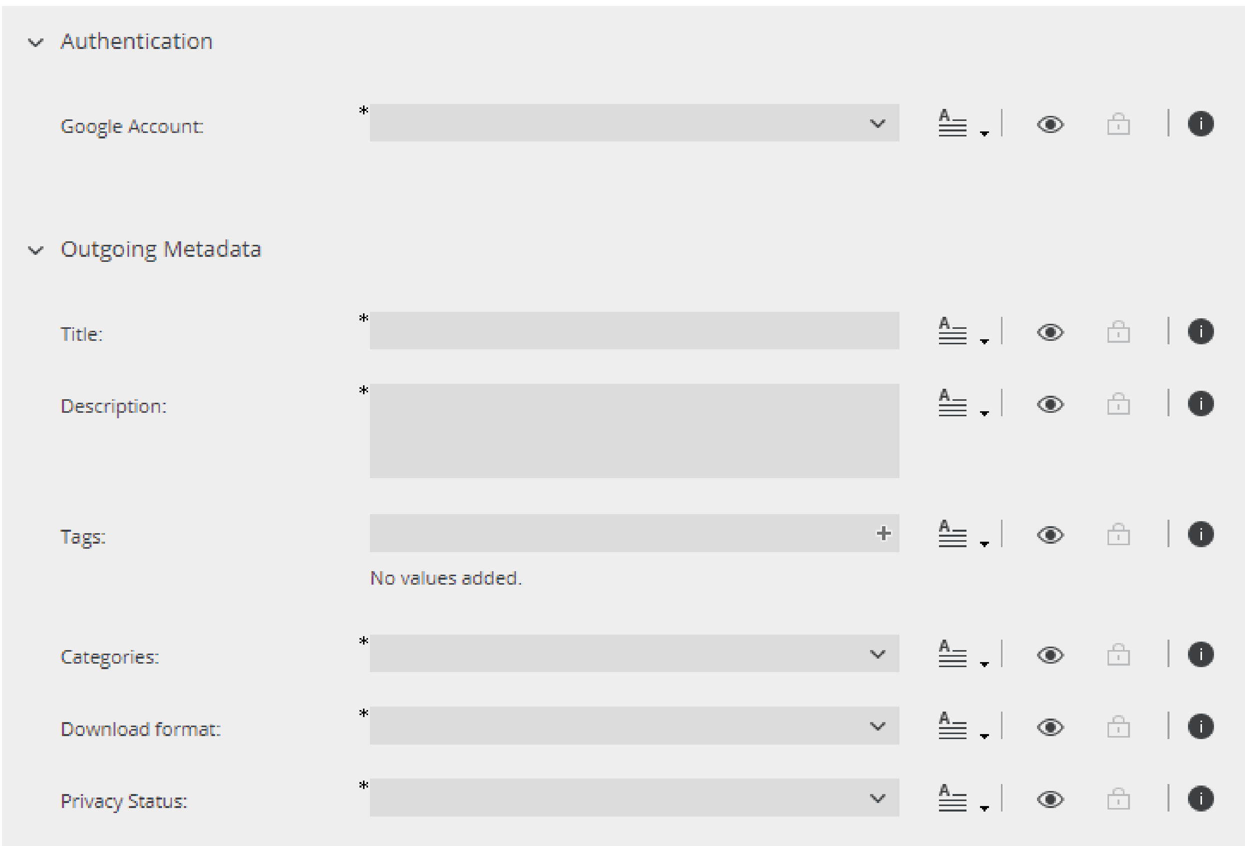
Recommended Reading

To see the effects of the described fields in an example, consult the "*movingimage Connector Overview*" chapter in the **Customer Knowledge Base**.

Stage handler settings for YouTube

This article contains an overview of the different stage handler settings for a YouTube stage handler:

The section "General" is available for every stage and therefore excluded from the screenshot. It contains fields for the **Name** and **Trigger** mechanism of the stage handler, as well as the "Scope", which determines which assets will be published. With the "**Recursive**" checkbox, you can ensure that assets from sub-nodes of the chosen "*Scope*" node will also be published.



In order for the stage handler configuration to be successful, the **"backstage-youtube" product extension** must be correctly installed and configured on your system.

You can find the installation instructions for the YouTube Connector in the **Customer Knowledge Base**.

Authentication

In the "Authentication" section, you set a previously configured *Google Authentication Profile* in the field "**Google Account**". The *Google Authentication Profile* contains your YouTube account's credentials and is used to log into YouTube and synchronize assets.

The instructions for creating a *Google Authentication Profile* in the CMA can be found in the **Customer Knowledge Base**.

Outgoing Metadata

In the "Outgoing Metadata" section, you set the metadata for each synchronized video:

We recommend that you use the "Link to Metadata" input mode for these fields to ensure that CELUM metadata gets synchronized to YouTube and provides real value to the viewers.

- **Title**: Specify which title should be shown for the videos on YouTube.
- **Description**: Specify the video description. Square brackets [] or angle brackets < > are not allowed.
- **Tags**: Add keyword tags to the videos.
- **Categories**: Choose the YouTube category that the videos should be sorted into on YouTube.

The instructions for importing the YouTube categories in the CMA can be found in the **Customer Knowledge Base**.

- **Download format**: Specify the format that synchronized assets will be converted to during upload to YouTube.
- **Privacy Status**: Define the privacy settings for the videos on YouTube. The values reflect the privacy levels on YouTube: *Public*, *Unlisted* and *Private*.

Automatically add videos to a YouTube playlist

With YouTube playlist's auto-add feature and a YouTube Connector stage handler, you can automatically add synchronized videos to a dedicated playlist in your YouTube channel.

The "*Automatically add videos to a YouTube playlist*" article in the **Customer Knowledge Base** explains how.

Deal with publishing issues

Sometimes Stage synchronization does not go as planned. In that case, error messages are displayed for the Stage Handler and for the synchronized assets in the Backstage tab. This topic lists some common error messages and the steps which you can take if you encounter them.

The error messages in the Stage Handler's **overview** section are independent of the Stage which you want to synchronize to. The error messages in the Stage Handler **asset list** depend on the current Stage and the individual assets' metadata.

Stage-independent issues for Stage Handlers

Error message	Next steps
The Sync Run for **<name of the Stage Handler>** could not be finished due to 1 validation error. Please check the Stage Handler settings and try it again.	Check in the Stage Handler settings whether any of the settings are invalid. This may happen for example if the Scope node was deleted or a mapped information field was deleted from the CELUM Content server configuration. In this case, the affected field in the settings will be empty.
The Sync Run for **<name of the Stage Handler>** could not be finished due to an error. There may be a sync already running for this Stage Handler. Please wait a minute and try it again.	This error may occur if the Stage Handler which you are trying to synchronize is currently being synchronized by another user. Wait a few minutes, refresh the Stage Handler and see if the synchronization status for the handler has changed.
Errors occurred during execution	Check in the asset list of the Stage Handler for the individual errors which occurred for some assets. These individual errors will give you more information about why the assets could not be synchronized.
<number> validation error(s) found. Please check the settings and try again.	Check in the Stage Handler settings whether any of the settings are invalid. This may happen for example if the Scope node was deleted or a mapped information field was deleted from the CELUM Content

	server configuration. In this case, the affected field in the settings will be empty.
Stage Handler validation aborted due to errors.	This error occurs primarily if the Stage Handler which you have open was deleted by another user. Therefore, the Stage Handler could not be loaded or validated. Just reload the Stage Handler list for the current Stage Handler Master.

Stage-dependent issues for individual assets

At least one Backstage connector for a media platform (Stage) must be enabled on your CELUM Content server to use Backstage and see Stage-dependent errors.

Download assets

CELUM Content offers powerful **conversion capabilities** which allow you to download assets in a variety of different resolutions, dimensions, or file formats. Specific resolutions, dimensions, and file formats are combined in **download formats,** which are applied to assets during the conversion for download.

The central tool for downloading objects from CELUM Content is the **download basket**, which is part of the dock. The download basket is responsible for converting assets into a specific format, or for creating a ZIP archive for multi- or node download.

Download a single asset in original format

For downloading a single asset, there's a shortcut to download it in its original format:

1. Select one or multiple assets in the asset list.
2. Choose "Download Original" from the context menu or active menu.

Download multiple assets in original format

To download multiple assets in their original formats at the same time, you can simply download the entire node which contains these assets:

1. Select a node in the navigation tree and open the context menu.
2. Click "Download" in the context menu.
3. A new dialog opens. Choose whether you want to download
    - only the assets directly within the selected node (Direct download) or
    - also the sub-nodes within the selected node and their assets (Recursive download).
4. The selected node is added to the **download basket**, where it is prepared for download. A green bar below the node's thumbnail shows when the processing is complete.
5. Click "Start download" on the right side of the download basket.
6. The selected node is downloaded to your local file system as a ZIP archive.

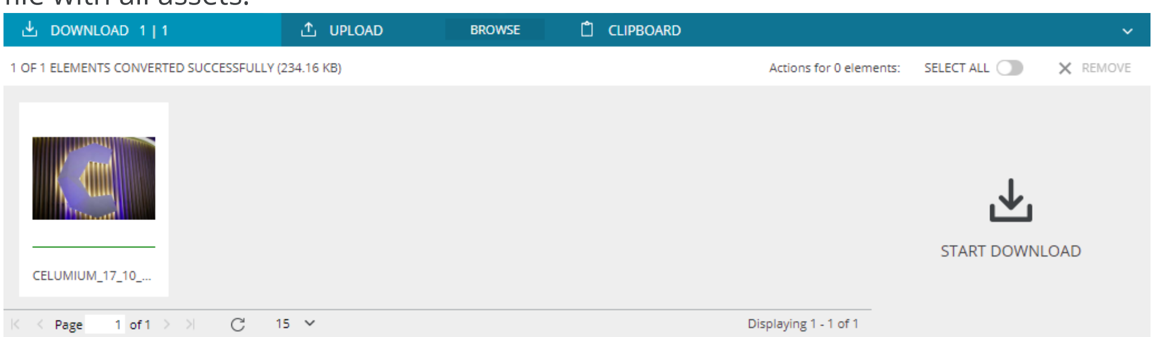
To download multiple assets selected in the asset list, you'll need to add them to the **download basket** instead

Download assets in any format via download basket

1. Select one or multiple assets in the asset list.
2. Choose "Add to download basket" from the context menu or active menu.
3. A new dialog opens. Choose one of the download formats in the list.

Only download formats which can be applied to all selected assets are shown in the list. If the chosen download format has a copyright disclaimer message enabled, click "Accept" and "Confirm" to continue. This message can be configured in the Configuration Management Application.

4. After you choose a download format, the assets are added to the **download basket**, where the chosen Assets are converted to the chosen download format.
5. Click "Start download" on the right side of the download basket to download a ZIP file with all assets:



In rare cases, the conversion may fail if not all assets can be downloaded in the chosen format due to technical constraints or connection problems. Please consult **Deal with download issues** about what to do in such cases.

Pause and resume a download

You can pause any download in your browser's Download Manager:

- **Microsoft® Internet Explorer / Edge**: Click the "Pause" or "Resume" button located next to the current download's status at the bottom of the browser window.
- **Google Chrome**: Right-click the ongoing download in the download bar (usually at the bottom of the browser window) and click "Pause" or "Resume".
- **Mozilla Firefox**: Open the download progress via the browser's toolbar. Right-click on the ongoing download and click "Pause" or "Resume".

All listed browsers except Google Chrome allow you to exit the browser application completely and still retain your paused download progress after you open the browser again. In Google Chrome, downloads are canceled when you exit the application.

Cancel a download

If you are downloading a single asset in its original format, the download is instantaneous, so you cannot cancel it.

If you added multiple assets or nodes to the download basket, you can cancel the download by removing either selected or all objects from the download basket.

1. Select specific objects or use the "Select all" option in the download basket's toolbar.
2. Either use the "Remove" option in the download basket's toolbar or use the "Remove" context menu entry on the objects.
3. The selected objects are no longer part of the download. Cancel a whole download by removing all objects from the download basket.

FAQ and troubleshooting

Can I download assets and nodes at the same time?

You cannot select and add assets and nodes to the download basket in one step. However, you can first select assets, add them to the download basket, and then select a node and download it. Both the assets and the node are then located in the download basket. After everything is converted, click "Start download" to generate the ZIP archive, which now contains the entire contents of the download basket.

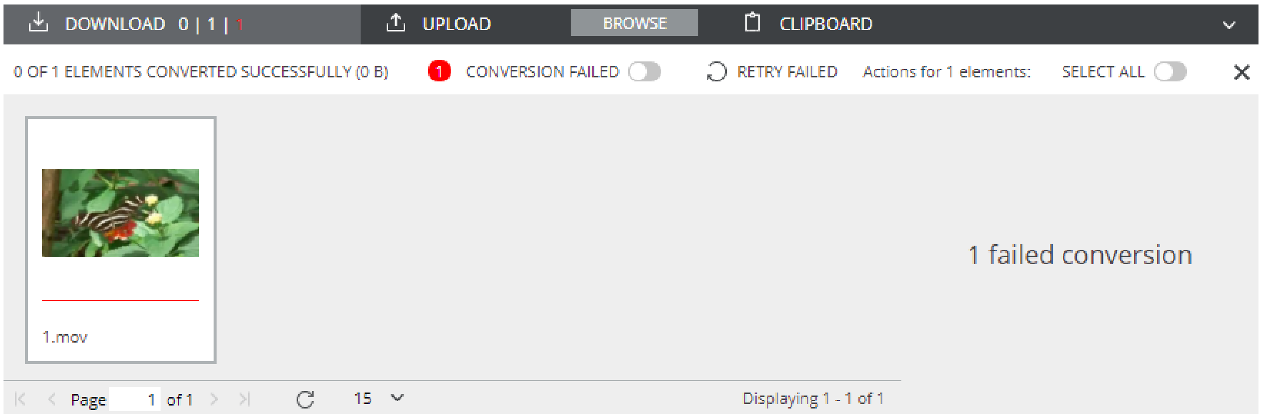
An error occurred and I can't start the download in the download basket. What can I do?

If you cannot start the download because the "Start download" button does not appear, the most likely cause is an error in the conversion and processing of one or more assets in the basket. The affected assets are marked by a red progress bar. You have several options to deal with this problem, which are described in **Deal with download issues**.

As a power user, you can also configure your own download formats in the **Configuration Management Application** and make them available to other users. You can find instructions in the **administrator guide** in the **Customer Knowledge Base**.

Deal with download issues

If the processing of assets in the download basket fails, you cannot start the download. The "Start download" button is not available in the basket, and a status message about failed conversions is displayed instead:



This can have various reasons, for example:

- The conversion of one or multiple assets may fail for technical reasons, even though the chosen download format supports the asset(s).
- The server which is responsible for the conversion may be unavailable.

Filter failed assets

Click the "Conversion failed" toggle button in the download basket's menu bar to filter only failed assets.

Retry failed assets

Sometimes, a conversion error is only a temporary hiccup which may resolve itself. This can for example be the case if your connection to the CELUM Content server is slow. Use the "Retry failed" option in the download basket menu bar or open the context menu on a failed asset and choose the "Retry Conversion" menu entry. This triggers another conversion attempt and you can see if the problem persists or is now resolved.

View conversion errors

1. Select a failed asset in the download basket.
2. Open the context menu and choose the "Show conversion errors" menu entry. A dialog opens.

3. In the dialog, you will find a **Conversion-ID**, which can give you information about the error.

If you cannot solve the problem within the application, contact a technical server administrator and forward the Conversion-ID to them. The technical server administrator can check the log files and fix the problem directly on the server.

Edit images before download

CELUM Content offers two ways to adapt an image asset before downloading:

- The **"JPEG - variable size" download format** allows you to **adapt the dimensions** for the downloaded assets on the fly before the conversion.
- The **"Image Editor" product extension** unlocks another special download format which opens an **Image Editor** overlay before download and allows you to make advanced adaptations.

Adapt the image dimensions

1. Select one or multiple image assets.
2. Open the context menu and click "Add to Download Basket". The download format dialog opens.
3. Choose the "JPEG - variable size" format. A new dialog opens.
4. In the dialog, you can choose between the following sizing options:
   - **Predefined**: Choose out of several predefined size options.
   - **Manual**: Manually enter the width and height for the downloaded assets.
   - **Untouched**: The dimensions won't be changed during download.
5. Click "Download" and the assets will be downloaded as JPEG files with the chosen dimension to your default download location.

Advanced adaptations with the Image Editor

Product extension required!

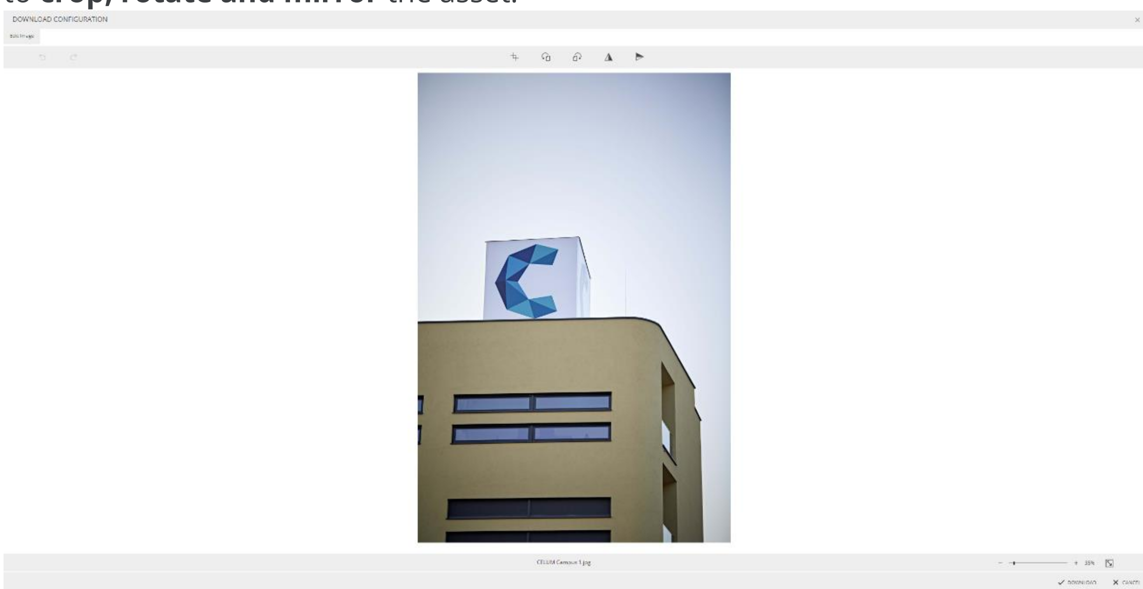
For this functionality to be available, the "**Image Editor**" product extension must be enabled for your CELUM Content server. **This extension may require additional license payments!**

With the "Image Editor" product extension, you can edit image assets before downloading them. **The image editor is bound to specific download formats. It works when its download format interceptor is configured for a specific download format by a super-administrator and that download format is chosen during download.**

Learn about the download format interceptor

To see how the image editor is enabled for a download format, consult the **Customer Knowledge Base**.

1. Select an image asset in the asset list.
2. Add the image to the **download basket**.
3. In the download format dialog, pick a download format that has the "Image Editor" download format interceptor enabled.
4. Click "Download". The image editor overlay opens. It provides the possibility to **crop, rotate and mirror** the asset:



5. Click "Download" in the image editor overlay.
6. The asset's converted binary file will be downloaded with the applied changes.

You can edit and download multiple assets in one sitting.

Download assets with embedded metadata

Some download formats support embedding of CELUM Content **metadata** (Asset information fields) into the asset properties of the converted and downloaded asset in your local file system. Most likely, a dedicated download format is available for embedding metadata.

To check if any assets you downloaded from CELUM Content have embedded metadata, you can compare the Properties of the converted asset with the Properties of the same asset downloaded in its **original format**. If the converted asset contains more properties or different properties, these were probably embedded during the download from CELUM Content.

The exact metadata embedded with each download format is decided by a **super-administrator**. As such a user, you can configure **outbound metadata mappings** which should be included in a specific download format in the **Configuration Management Application**.

The **Administrator Guide** in the **Customer Knowledge Base** explains how to do this.

Save assets as favorites

If you often work with the same assets in the system, you may want to create a shortcut to them. These shortcuts in CELUM Content are called "favorites".

Set an asset as a favorite

1. Open the context menu on an asset

> Multi-selection is not supported for favoriting.

2. Choose "Create Favorite" from the context menu.
3. A snackbar notifies you that a favorite object was added.

Open a favorite asset

You can find all your favorites in the "Home" main view tab (your Dashboard) in the "My favorites" start page widget.

- Click an asset in the widget to open the containing main view tab. The asset is automatically selected.
- Click a favorite asset's node in the widget to open its main view tab and automatically select the containing node.

Remove an asset from your favorites

1. Open the "Home" main view tab (your Dashboard).
2. Click "Edit" next to the favorite header. A small trash bin icon 🗑 appears next to each favorite.
3. Click the trash bin icon 🗑.
4. Click "Done" when you are finished.

Delete or restore assets

In case you no longer have use for specific objects on the CELUM Content server, you can permanently delete them from the system.

When the Trash Bin function is configured on the system, the assets are moved into the Trash Bin first. The assets in there can either be **deleted permanently** or **restored**.

Delete unreleased assets from the upload basket

1. Select one or multiple assets in the upload basket.
2. Either click "Delete" in the upload basket's menu bar or open the context menu and click "Delete Asset(s)".
3. Click "OK" in the confirmation dialog.
4. The selected assets are permanently deleted from the upload basket.

Delete released assets or place them in the Trash Bin

If you do not have the proper permissions to delete assets from a specific node, then "Delete" is not available.

1. Select one or multiple assets in the asset list and open the context menu.
2. Click "Delete".
3. Click "OK" in the confirmation dialog.
4. This will result in the following, depending on the system configuration:
    - If the Trash Bin function **is activated**, the asset(s) are be placed in the Trash Bin.
    - If the Trash Bin function **is not activated**, the asset(s) are permanently deleted.
5. If the assets were placed in the Trash Bin you can **permanently delete them** or **restore them** from there.

Permanently delete assets from the Trash Bin

Prerequisites for this function:

- Administrator permission to see the "Trash Bin" main view tab.
- Administrator permission to see the deleted assets inside the Trash Bin root node.

In case the above-mentioned prerequisites are not met, please contact your Administrator to restore the assets in question.

1. Open the "Trash Bin" main view tab to see the deleted assets.
2. Right-click on a deleted asset to open the context menu.
3. Click on "Delete" in the context menu.
4. Click on "Ok" in the dialog to permanently the asset from the CELUM Content system.

Restore assets from the Trash Bin

Prerequisites for this function:

- Administrator permission to see the "Trash Bin" main view tab.
- Administrator permission to see the deleted assets inside the Trash Bin root node.

In case the above-mentioned prerequisites are not met, please contact your Administrator to restore the assets in question.

1. Open the "Trash Bin" main view tab to see the deleted assets.
2. Right-click a deleted asset to open the context menu.
3. Click on "Restore". A dialog for choosing a node opens.
4. Select a target node to designate where you want to restore your asset.

You will not be able to restore an asset into a node you don't have permission for.

5. Click "Finish" to restore your assets to the target node.

FAQ and troubleshooting

I've opened the Trash Bin and see its content, but I don't see the "Restore" action on assets in it

If you can see the "Trash Bin" tab and all assets inside the Trash Bin node, but you're missing the specific menu entries for the Trash Bin, then the function hasn't been configured correctly on your system. Please contact a technical administrator who can take a look at the configuration.

I see the Trash Bin in the tree, but I can't see any assets in it

If you can't see assets inside the Trash Bin, then the Trash Bin is either empty or you're missing permissions to see assets inside it. These have to be set by a power-user in the **Advanced UI**.

They are local permissions on the root collection of the Trash Bin. The root collection is not visible in the Nova UI, only its content is shown.

Find content

Find content

CELUM Content provides powerful search capabilities. This topic covers the simplest search cases, searching for assets and nodes.

Find assets by any attribute

The simplest way to search for assets is to use the **quick search** or **full text search** function. It looks for the search terms in all available asset metadata. The quick search field is available on every main view tab next to the Administration menu:

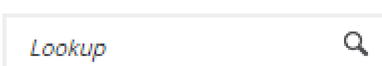
The full text search field is also a central part of the Dashboard. Simply enter any text in the full text search field and press Enter. You are automatically forwarded to the "Search" main view tab, where you can view all found assets.

By default, the full text search and quick search look for all entered values. If you want to restrict the search, you can either use the widget's **operator buttons** or use **in-text operators**.

The found assets are sorted by their **relevance** in the "Search" main view tab. You can find information on how the relevance is calculated **below**.

Search for nodes

You can search for nodes with the **node lookup** function available in every node type main view tab in the navigation tree:



1. Enter any text in the Lookup box located above the navigation tree.
2. A drop-down menu shows you all node names which contain the search term.
3. Click a node name to see the selected node in the navigation tree.

Calculation of the search relevance

The relevance is calculated depending on how often and in which type of metadata the search term is found. If the search term(s) are found in the asset name, original file name, or node name, the result will be ranked highest, followed by information fields, parent node paths and finally file properties. If the search term(s) are found in a combination of these metadata for the same object, the relevance accumulates.

A practical example

You're searching for the term "red". In the current node, there are 4 assets:

- "Red car" has the search term in its asset name and original file name.
- "Car 1" has the search term in its original file name and its "Description" information field (in 2 languages).
- "Silver car with red upholstery" has the search term in its asset name and in its "Interior Description" information field (in 1 language).
- "Black car" has the search term in 3 different information fields.

The result will list the "Red car" asset at the top, because the search term is in 2 top-ranked fields. The "Car 1" asset will come in second, because it has the search term in 1 top-ranked field and 1 information field in 2 languages. The "Silver car with red upholstery" asset will come in third, because, while it also has the search term in 1 top-ranked field and 1 information field, it has it in 1 language. "Black car" is in last position because it doesn't have the search term in any top-ranking fields, but just in information fields, which are ranked lower.

Haven't found what you were looking for? Refine your search results with **search widgets** or **search restrictions**.

As a power user, you can also **configure the full text search** to exclude certain asset metadata from being found. You can find instructions for this in the **Administrator Guide** in the **Customer Knowledge Base**.

FAQ

Why can't I find assets by their modification or creation date with the full text search?

These fields (among others) are automatically excluded from the full text search. However, you can use the dedicated **search widgets** for these fields in the "Search" main view tab.

Why doesn't the full text search return results for all information fields?

There can be multiple reasons for this. Either you are not allowed to see the content of certain information fields, or a power user restricted the Fulltext Search widget to exclude certain information fields.

In either case, talk to a power user to either get permissions for the information fields or enable the Fulltext Search widget to look through them.

How can I search for nodes by their metadata?

Unfortunately, searching for nodes via node metadata is not possible. You can only find specific nodes via the node lookup field above the navigation tree.

Refine your search with widgets

In the "Search" main view tab, you can refine your search with **search widgets** to find only assets which have a specific set of metadata or other attributes. All currently active search widgets are displayed on the left side of the main view.

> Alternatively, you can modify the search with the **Search Restrictions** feature.

Add a new search widget

1. Add single widgets easily with the + button. A drop-down list opens. This list shows widgets for all available asset information fields and certain asset properties.
2. Choose a widget from the drop-down list. The chosen widget is added to the main view.
3. Enter search terms which you want to look for. You can also use **search operators** while typing. The CELUM Content search engine will only look for the search terms in the respective widget's information field or asset property.
4. Some widgets offer **more complex controls** to further restrict the search results.
5. Depending on whether the automatic search function is turned on or off, the search results will be automatically updated or you need to click the "Search" button to trigger the search.
6. All search results are shown in the asset list on the right side of the main view.

Modify search widgets

Search widgets for different metadata offer the following controls, depending on the metadata which they look for:

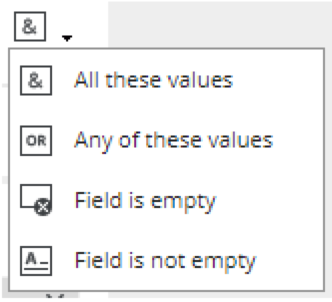
Range search

All widgets which search for date or number information fields offer this option. You can enter either a specific date/number or date range/number range. To enter a date/number range, check the "Select Date Range" or "Select Number Range" check box in the widget.

Examples for widgets which offer this control: Modified, Created, ID.

Operator restriction

All widgets which can search for multiple text values allow you to restrict whether the search should return assets with *all* chosen values or *any* chosen values. Additionally, you can restrict the search for some fields to just returning assets which have *a value* or *no value* in the information field in question:



Examples for widgets which offer this control: Fulltext, Language (or other node-referencing information fields), Aspect Ratio (or other date or number fields).

Node selection

All widgets which search for specific node values (i.e. node-referencing information fields) let you either choose nodes from a list directly within the widget or allow you to open a dedicated browsing dialog which gives a better overview of the node hierarchy for the information field in question.

Settings

There may be other settings for certain widgets. For example, you can restrict the widgets to a single information field if it searches through two information fields by default.

Example for a widget which offers this control: Creator/Modifier. In this case, you can choose if you want to look for the "Creator" field, the "Modifier" field, or both fields.

In-text search restrictions

In addition to the **operator buttons** available for many widgets, you can also restrict the search directly while typing a search term into a widget:

- Use double quotes ("...") to search for exact matches for the quoted text. For example, enter "red car" in order to find only assets which contain the phrase "red car" in any fields.
- Use the "dash" character (-) to exclude terms from the search. For example, enter red -car in order to find only assets which contain "red" in any fields, but not "car".

Reset the search

Click the button to reset the Search main view tab to its default setting. This will remove all your search widgets and restore the Fulltext search widget. However, it will not restore the initial state of the automatic search function.

Alternatively, you can remove single search widgets one by one.

FAQ and troubleshooting

How many search widgets can I add?

You can add as many search widgets as you like – there is no maximum amount. This allows you to narrow down the search to a very refined set of search results. However, you cannot add the same widget twice.

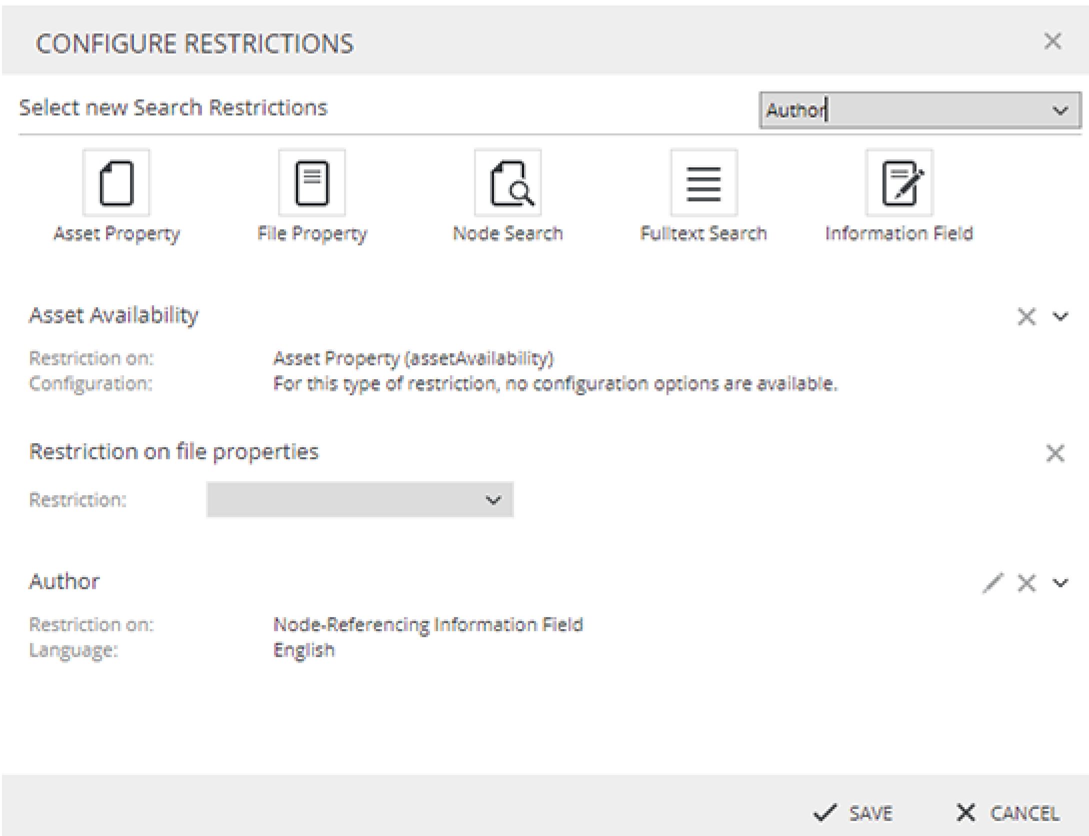
How can I stop the search from being executed automatically?

At the top of the search widget list, the  button indicates that the automatic search feature is activated. To turn it off, click this button and deselect it. An additional search button will appear and allow you to manually start your search at your convenience.

Configure search restrictions

Search restrictions are basically the same as **search widgets**. The only difference is that you can configure all search widgets in a dedicated dialog and add them all to your search at the same time.

With the icon, you can open the Search Restriction dialog:



The "Select new Search Restrictions" box lets you instantly choose a specific search restriction (similar to how you can add search widgets one by one in the Search main view tab). The chosen restriction is displayed in the lower part of the dialog and you can configure the restriction if possible (e.g. change the language for node-referencing information field values).

Alternatively, you can click the metadata category buttons in the top part of the dialog to add a search restriction of that particular category. In a second step, you need to choose which metadata the restriction should be for.

After you confirm the dialog, all the chosen search restrictions will be added as search widgets to the left side of the Search main view tab.

Search in specific nodes

If you want to further restrict your search to return only assets that are assigned to a specific node you can add the additional "Search in Node" **search widget**. Either add the widget in the Search main view tab, or open the context menu on a node in the navigation tree of a node main view tab and choose the "Search in" menu entry. You are automatically forwarded to the Search main view tab when you use this function.

If you do not want to leave the Node main view tab that you are in, but still want to see only assets which are **assigned to** specific nodes or which **reference** specific nodes in their information fields, you can use the additional "**multi-filtering**" and "**navigation context**" functions which CELUM Content offers directly in the navigation tree in Node main view tabs.

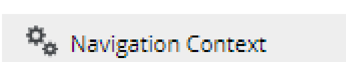
> The multi-filtering and navigation context functions are only available if they were configured by the technical server administrator.

Filter assets by assigned nodes

1. Open a Node main view tab (e.g. Folder, Keywords, or Collections).
2. Select a node in the navigation tree.
3. Select multiple other nodes by pressing Ctrl on your keyboard and clicking the nodes simultaneously.
4. The asset list refreshes and shows only the assets which are assigned to all selected nodes.

Filter assets by referenced nodes

You can filter the asset list to show all assets which reference the currently selected node in one of their node-referencing information fields. The assets do not have to be directly assigned to the node to be visible if the "**Navigation Context**" function is activated. If at least one node of a specific main view tab's node type can be referenced in a node-referencing information field, you can see the navigation context panel in the navigation tree on that tab:



> In the default configuration, only nodes of the "Keyword" type can be referenced in information fields.

Click the configuration icon to open the navigation context. The navigation context contains a list of all node-referencing information fields which are configured on your

CELUM Content server. You can activate or deactivate each field to decide whether referencing assets should be shown in the asset list when you select a keyword which is referenced in the field.

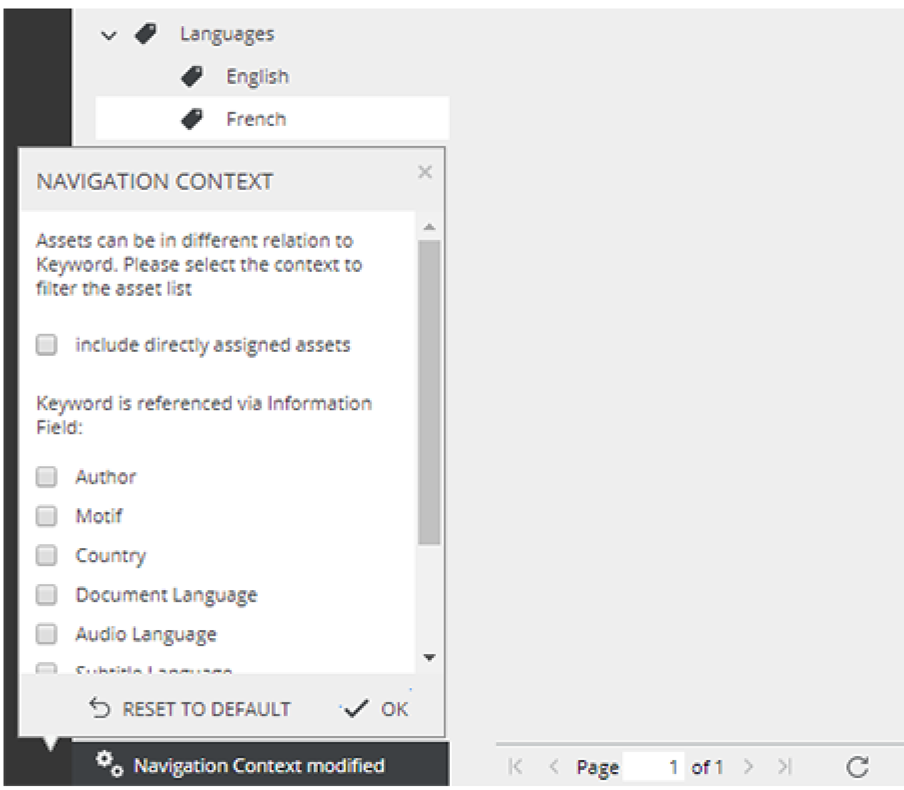
Additionally, you can activate the "include directly assigned assets" option to also show all directly assigned assets inside the selected Keyword.

By default, all node-referencing information fields and the additional options are activated in the navigation context, so you can easily activate everything with the "Reset to default" button.

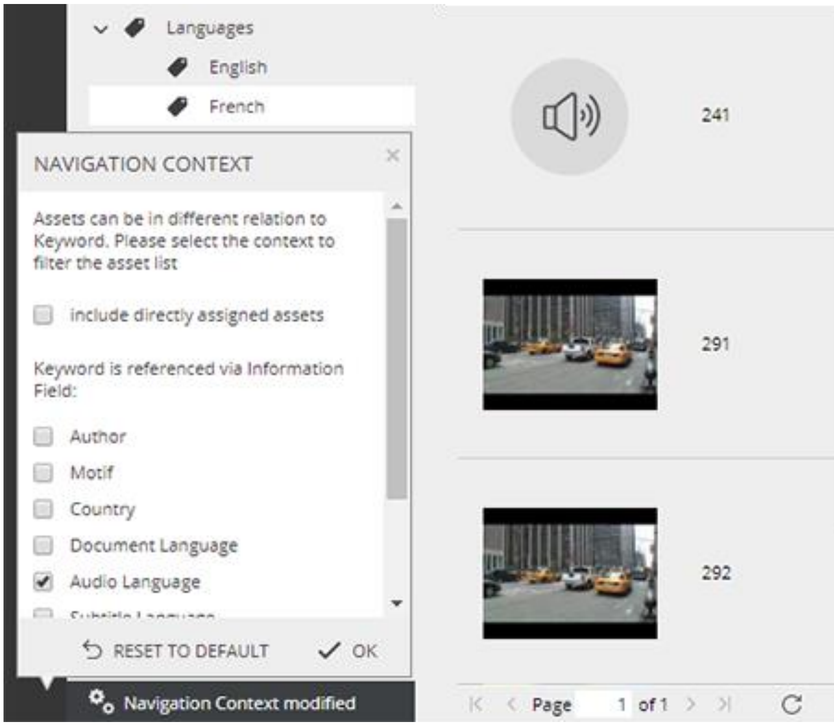
A simple example

Say you have selected the keyword "French", which can be referenced in various node-referencing fields (e.g. Audio Language, Subtitle Language, etc.). The keyword is both referenced in some assets' information fields and has some directly assigned assets.

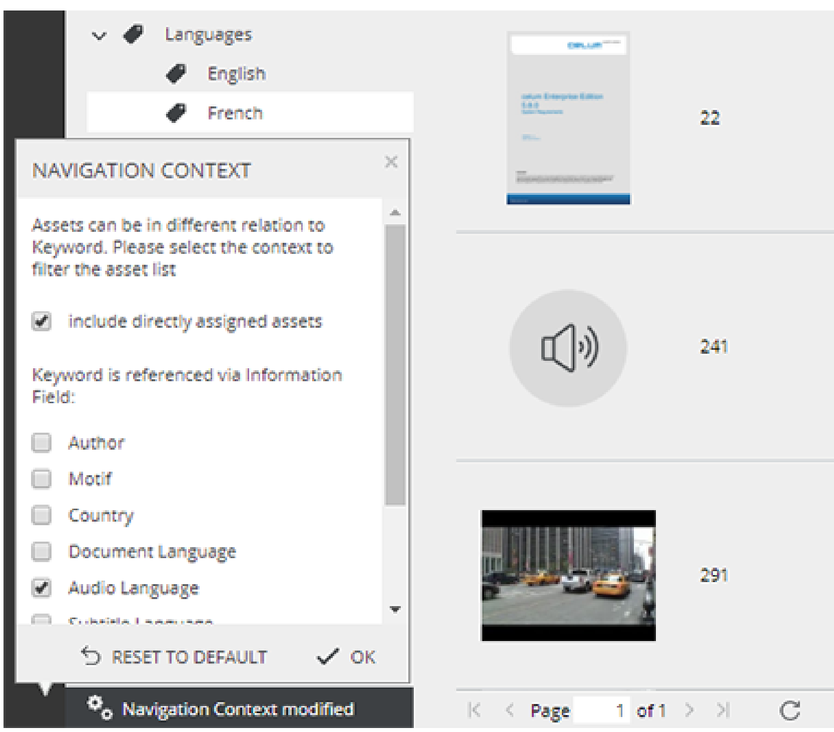
The navigation context is deactivated (no options are activated in it), so no assets are shown:



The "Audio Language" field is activated and all assets which reference the keyword in the field are shown:



The option to include directly assigned assets is also activated, so these assets are also shown:



Functionality notes

While the navigation context is modified, you cannot drag and drop assets from one keyword to another. You need to reset the navigation context to its default in order to assign and unassign assets to and from keywords.

The configuration of the navigation context is retained in the application state, so the navigation context stays the same for your user even if you log out and log in again.

Save and load searches

If you want to repeatedly search for assets with the same set of metadata, or have multiple different searches which you execute regularly, then CELUM Content's search saving and loading functionality is for you. Additionally, you can share a saved search configuration with other users.

Save a search

1. To save a search configuration, click the button in the widget list's toolbar. A dialog opens.
2. Enter a name and an optional description for the search.

> The name for the saved search does not have to be unique. You can reuse a name which you have already used for a different search configuration. However, to maintain clarity, we recommend that you use unique names or add informative descriptions.

3. Save the search with "Finish". All search widgets which are part of your current search configuration are saved. However, the automatic search function setting is not saved.

Load a search

1. To load a saved search, click the button in the widget list's toolbar. A dialog opens.
2. The saved searches are displayed in easily discernible list items.
3. Click a search item in the dialog to load all search widgets associated with it.

Delete a saved search

1. Open the saved search dialog with the button in the widget list's toolbar.
2. Instead of clicking on an item in the dialog directly, click the garbage bin icon for the search on the left side of the dialog.
3. Confirm the deleting action.
4. The deleted search item is removed from the dialog.

Share a saved search

1. Open the saved search dialog with the button in the widget list's toolbar.

2. Next to the garbage bin icon, the following icons allow you to share a saved search configuration:
    - - Send hyperlink for saved search. This automatically opens your default e-mail program.
    - - Copy hyperlink to clipboard for saved search. This copies the hyperlink and you can immediately paste it somewhere.

Search configuration depends on user permissions

When the recipient opens the link, the search is immediately executed using the recipient's permissions. If the recipient does not have permissions to see any of the active widgets (respectively, their underlying metadata fields), an error message is shown and the search can't be executed.

Additionally, the results for the shared search configuration also depend on the recipient's permissions on specific nodes and assets. Therefore, the recipient may get different search results than you for the same search configuration.

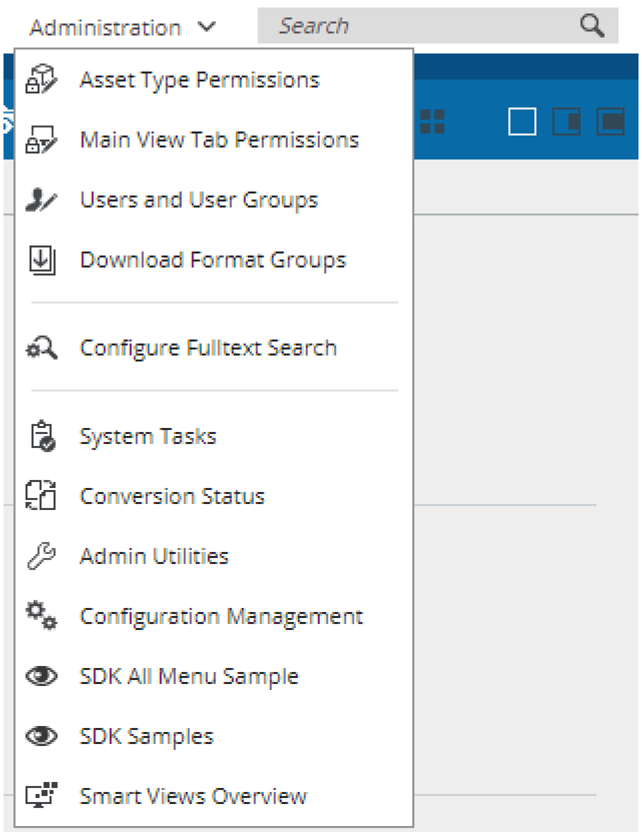
FAQ

Can I edit and overwrite an existing saved search?

You cannot update an existing saved search item. Instead, execute the search which you wish to update, then change the search's parameters and widgets and save it as a new search item. If you no longer need the original search item, you can delete it.

Administer the system

The administrative functions in CELUM Content are available in the **Administration Menu** in the Advanced UI. Only **"administrator" or "super-administrator" users** can access this menu:



This topic aims to familiarize you with some of the areas that can be accessed via the Administration Menu.

For full information, see Customer Knowledge Base

All usages and instructions for the different options in the Administration Menu are documented in the **Administrator Guide** in the **Customer Knowledge Base**.

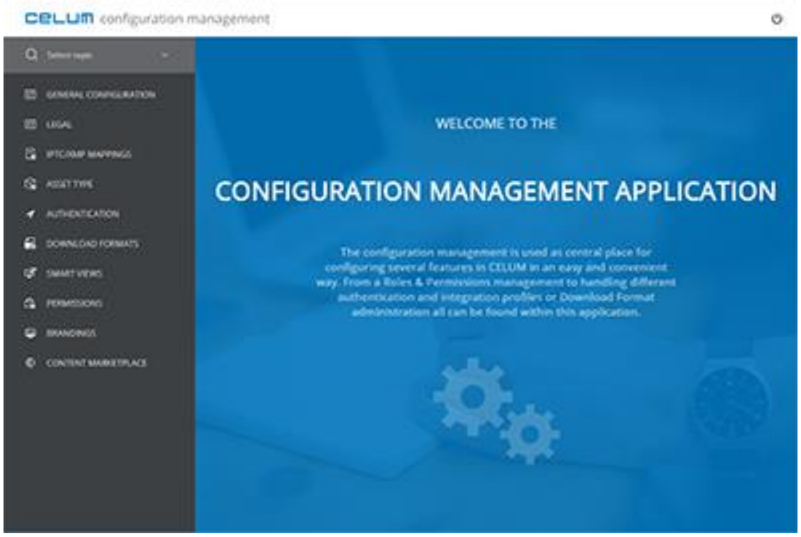
The Configuration Management Application

The Configuration Management Application (CMA) is an administrative interface that allows you to configure the application during runtime. Open the Administration menu and click "Configuration Management" to open it. The Configuration Management Application opens in a new browser tab.

Layout of the CMA

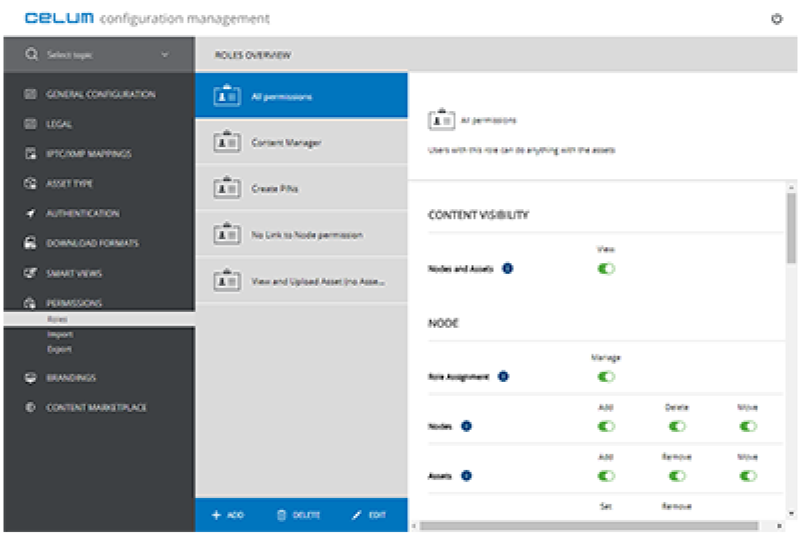
The Configuration Management Application is split into two columns:

- On the left side, a sidebar shows all configuration **categories**. Each category allows you to configure a certain part of the system. Click on a category to expand all **sub-categories** which can be configured.



The CMA categories can be expanded and configured, so your system's available categories depend on your customizations and extensions.

- On the right side, the **configuration area** allows you to configure the chosen sub-category.



Some sub-categories can be configured in multiple ways, thus offering reusable **configuration profiles**. The configuration profiles are shown on the left side of the configuration area in a list.

See Customer Knowledge Base for more information

All usages and instructions for the different configuration options in the CMA are documented in the **Administrator Guide** in the **Customer Knowledge Base**.

The Admin Utilities

The Admin Utilities allow you to test and troubleshoot technical aspects of CELUM Content without needing access to the CELUM Content back-end (the physical server that CELUM Content is installed on). Open the Administration menu and click "Admin Utilities". The Admin Utilities open in a new browser window which offers multiple **categories** on the left and a **configuration area** on the right.

Most functions in the Admin Utilities should only be necessary during the final checks, directly after installing CELUM Content.

System tasks

System tasks allow you to clean up your CELUM Content system in a multitude of ways with only a few clicks. Open the Administration menu and click "System tasks".

See Customer Knowledge Base for more information

All usages and instructions for the different system tasks are documented in the **Administrator Guide** in the **Customer Knowledge Base**.

Other functions

Other functions

Some functions of CELUM Content are independent of assets and nodes. This topic gives an overview of those functions.

- In the main view tab "Statistics", you can **view system statistics** which give an overview of CELUM Content usage.

This function requires a **product extension**, which can incur additional licensing costs!

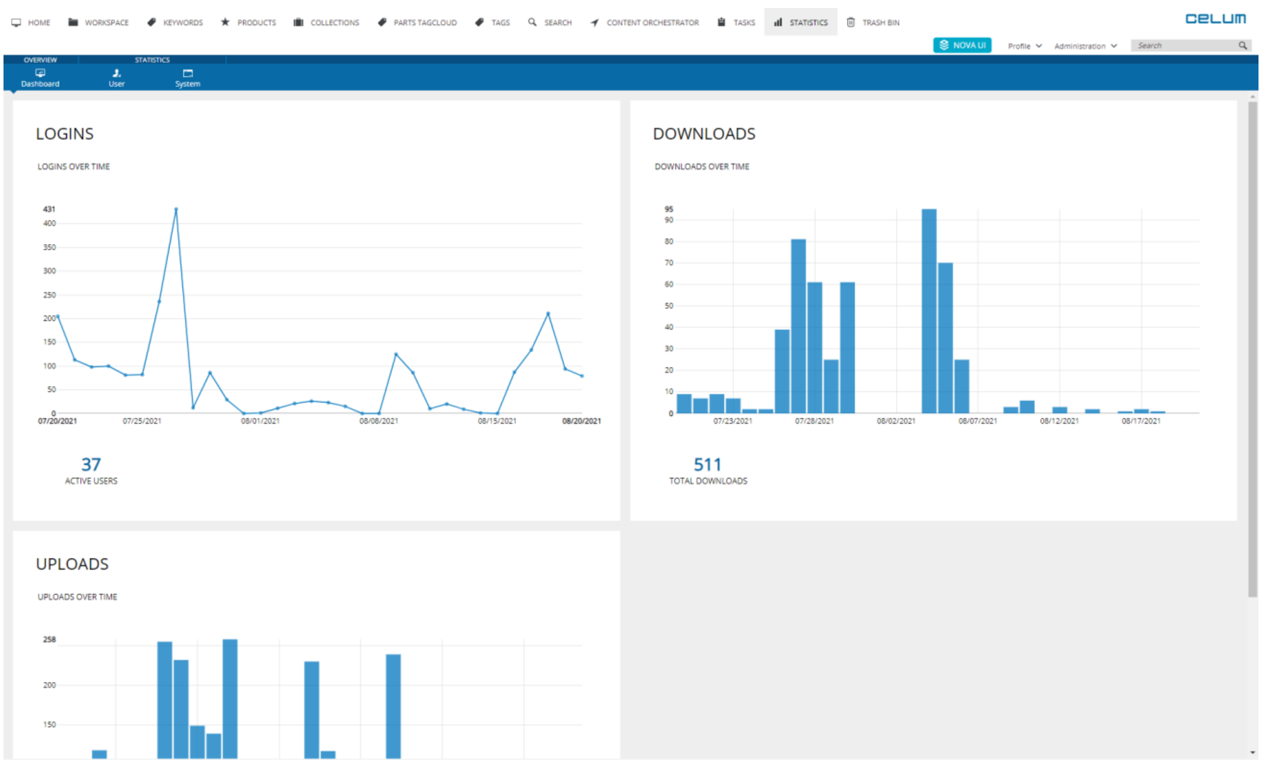
View system statistics

Requires a product extension!

To use this function, the product extension "Statistics UI" must be installed and configured on your CELUM Content server. **This product extension can cause additional licensing costs!**

Additionally, you need the permission to see the respective main view tab.

The "Statistics UI" product extension, if properly configured, offers a new main view tab which shows system and user statistics in handy diagrams:



In the active menu above the tab's main body you can navigate between various categories. The menu area "overview" contains a dashboard that is shown when you open the statistics tab for the first time. It shows the diagrams of all statistics categories. The menu area "statistics" contains the following statistics categories:

- **User**: Contains statistics about CELUM Content users, like group sizes or number of logins.
- **System**: Contains global statistics like download or uploads.

In the categories, the relevant data is presented in three ways:

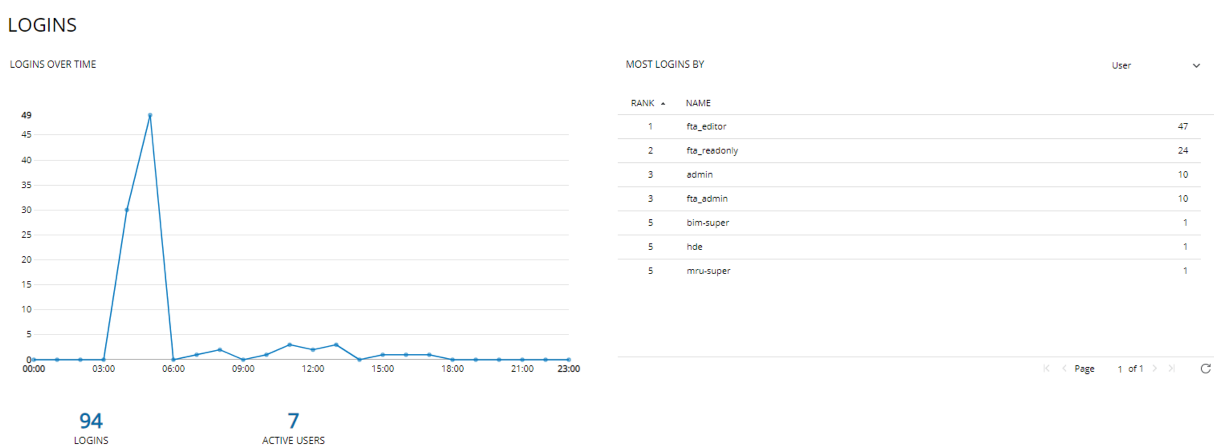
- **Diagram/Graph** of the relevant data over a chosen period of time. Hover your mouse over the diagram's data points to get additional information. You can examine each diagram by hovering over its data points with your mouse. Click on a diagram's data points to access the according statistics category.

> You can choose the displayed time period for the diagram, facts and ranking on the left side of the screen via drop-down or date pickers.

- Underneath the diagram, the data is expressed in **absolute numbers**, e.g., the total number of logins or total number of active users during the chosen time period.
- The data is also shown as a **ranking**, e.g., the users ranked according to the number of times that each user logged in during the chosen time period.

> Via a drop-down field above the ranking section you can switch to a different ranking view, e.g., user groups ranked according to the amount of logins of their member users.

The following image shows the "User" category as an example:



> **Installation instructions in Customer Knowledge Base**
>
> To set up the "Statistics UI" product extension, consult the **Customer Knowledge Base**.

Glossary

A

active menu: The active menu is located above the asset list and navigation tree. It contains the most important actions for a selected object (e.g. for a node or asset) on the left side and the functions to open the sidebar or detail view and to adjust the asset list on the right side.

administrator (Advanced UI): A type of user in the Advanced UI who has access to certain advanced functions, for example the user management, or asset type permissions.

Advanced Search (Nova UI): A full-page overlay over the entire browser window, which enables you to perform detailed searches.

Advanced UI: The "classic" user interface of CELUM Content, which is more complex than the Nova UI and gives you access to advanced and administrative functions.

asset: An asset is the representation of a digital file in CELUM Content. Assets are created when you upload files to CELUM Content. They can have metadata and they can be downloaded again in different formats.

asset list: The asset list contains all assets within a currently selected node or collection. In Advanced UI, each main view tab has its own asset list. In Nova UI, the asset list is located in the Explore View.

asset list configuration menu (Nova UI): Small three-dot-menu visible in the list view of the asset list in Explore View and Advanced Search. Allows to add or remove columns to and from the asset list.

asset property: Asset properties are properties which are automatically set during upload of a file, such as the asset's name or creation date.

asset type: In order to assign metadata to assets within CELUM Content, the assets need an asset type, which gives information about what kind of asset it is, and provides the metadata set for the asset.

B

back-end: The back-end of your CELUM Content server is the file system of the physical server machine.

Backstage (Advanced UI): The Backstage module allows you to automatically publish and update video assets (and other assets in some cases) to third-party media platforms. It is only available in Advanced UI.

bullet: Bullets (or information bullets) give status information about assets at a glance via a variety of small icons which are displayed for each asset in the asset list.

C

CELUM Cloud Account: The central CELUM account service which allows you to connect CELUM Content with the CELUM cloud services.

CELUM Drive: A desktop app which allows you to synchronize your content from CELUM Content to your local file system.

CELUM Work: The CELUM cloud application in which you can work on Workrooms with other people.

child collection (Nova UI): A collection that is located inside another collection in the tree.

CMA (Advanced UI): Abbreviation for Configuration Management Application.

collection (Nova UI): Collections are the main organizational units in CELUM Content's Nova UI. You link assets to collections in order to structure them. Collections can also have metadata icons of their own.

collection picker (Nova UI): A dialog that shows a list of collections which you can choose. The collection picker is shown, for example, when moving or linking assets.

Configuration Management Application (Advanced UI): A separate part of the CELUM Content interface which allows super-administrators to configure various aspects of the application. Users can access the Configuration Management Application via the Administration menu in the Advanced UI.

consumer user (Nova UI): A type of user in the Nova UI who only has permission to consume (i.e. view, search and download) content. A consumer user cannot edit metadata or asset content.

contributor user (Nova UI): A type of user in the Nova UI who has consumer permissions and additionally can contribute to CELUM Content, i.e. upload assets, create collections, or edit metadata.

criteria combination (Nova UI): Defines whether the returned objects in Explore View filters or Advanced Search should match all chosen criteria for a given filter widget, any criteria or no criteria.

D

dashboard (Nova UI): The dashboard is the first page you see when you log into CELUM Content's Nova UI. It contains a central search box as well as useful widgets like Favorites or recent uploads.

dashboard widget (Nova UI): A widget on the Dashboard for quickly accessing specific objects or functions.

detail view: The detail view shows all information about a selected asset, including a large, scalable preview.

dock (Advanced UI): The dock houses the upload basket, download basket and clipboard and is located at the bottom of the browser window. It can be collapsed and expanded.

download basket (Advanced UI): The download basket is used for processing assets when you download them in a different format than their original format. The download basket is located in the dock.

download format: A specific format in which an asset can be downloaded. A download format can define the dimensions, color space or file extension for the asset.

E

editor user (Advanced UI): A type of user in the Advanced UI who has permissions to upload assets, create nodes and edit metadata.

Explore View (Nova UI): The Explore View allows you to search and filter assets in the central asset list and to navigate through different collections in the tree.

F

file property: File properties are properties which are read out from the source file during upload. This includes data like aspect ratio, dimensions or frame rate.

filter combination (Nova UI): Defines whether the Advanced Search should look for objects by criteria from any or all active filter widgets.

filter criterion (Nova UI): A filter criterion is the actual value by which a specific filter widget should be applied. For example, if you filter by the widget "ID", then the criterion "1 - 100" filters all assets which have an ID between 1 and 100.

filter panel (Nova UI): Lists all available filter settings and allows you to turn filter widgets on or off in the Explore View.

filter widget (Nova UI): A filter widget can be any metadata field (asset property, information field, etc.) by which the asset list should be filtered. You select filter widgets in the filter panel (for Explore View filtering) or in the search panel (in the Advanced Search).

full text search: Looks for assets which match the search term within any asset criteria or metadata.

G

global permission: A global permission is the same independent of where you navigate in the system. This includes global user permissions (like upload or "Change password" permissions) and permissions for object types.

I

information bullet: Information bullets (or just bullets) give status information about assets at a glance via a variety of small icons which are displayed for each asset in the asset list.

information category (Nova UI): An organizational unit for multiple information fields. Information categories can be collapsed and expanded and have a heading to indicate which fields may be found in them.

information field: Information fields are metadata for objects which were defined by a system administrator. Information fields are only determined by your organization's requirements, not by any file properties.

information field set (Advanced UI): An organizational unit for multiple information fields. Field sets can be collapsed and expanded and have a heading to indicate which fields may be found in them.

L

Linking Feature: The Linking Feature enables you to automatically add assets to a node or collection when that node or collection is set as a referencing field's value for the asset. Removing an asset from a node or collection by removing the value from a referencing field value also works.

local permission: A local permission only applies to the object or location which you are currently in. For example, local permissions only apply to specific nodes/collections and their assets.

localized field: A localized field is an information field for which you can enter values in multiple languages.

M

magic button (Nova UI): A big button on top of the action area which opens the magic menu.

magic menu (Nova UI): A full-page overlay that lists all available actions for the current context, i.e. for the view you are in, the collection or asset you have selected and the permissions you have. It can be opened via the magic button.

main view (Advanced UI): The main application interface of CELUM Content's Advanced UI. It is made up of several main view tabs which serve different purposes.

metadata: A collective term for all information about objects, including information fields, file properties or other information.

metadata mapping (Advanced UI): A 1:1 connection between a CELUM information field and an external IPTC or XMP metadata field. The mapping can either work in inbound (external to CELUM field) or outbound (CELUM field to external field) direction.

metadata mapping set (Advanced UI): A metadata mapping set consists of multiple metadata mappings. This allows you to reuse multiple 1:1 field mappings in different mapping sets and use them in various ways.

metadata validation (Nova UI): Metadata validation describes the way in which the metadata of a collection and the assets within are validated. For a collection with "strict" metadata validation, all required information fields must be set on the collection and on its assets. You can only link assets to a strict collection if all required information fields are filled. For a collection with "tolerant" metadata validation, the metadata status does not matter and you can even link assets without filled required fields.

metadata wizard (Nova UI): A full-screen overlay which opens when you edit the metadata for one or multiple assets. You can fine-tune your selection, change the asset type and edit metadata in this overlay.

N

navigation tree (Advanced UI): The navigation tree is located in each node main view tab on the left side of the content area.

node (Advanced UI): Nodes are the main organizational units in CELUM Content's Advanced UI. You assign assets to nodes in order to structure them.

node-referencing field (Advanced UI): Such fields serve to create links between assets and several nodes. The value of a node-referencing field is always a reference to an existing node in the system.

Nova UI: The Nova UI is an alternative user interface for CELUM Content. It provides a more modern, dynamic look and feel with a slightly limited feature set.

O

object: Generic term for "asset", "node" or "collection".

overlay (Nova UI): An overlay opens over the full page on top of the application. Each overlay provides a dedicated functionality, for example, the metadata wizard for editing metadata or the Workroom wizard for creating a Workroom.

P

parent collection (Nova UI): A collection that contains other collections. It is shown on a higher level in the tree than its child collections.

parent node (Advanced UI): A node that contains other nodes.

placeholder asset: An "empty" asset which has no binary file. You can create a placeholder asset, edit its metadata, and use it in Workrooms - and decide later what its exact purpose and file content should be.

power user (Nova UI): A type of user in the Nova UI with special global administrator permissions.

preview controls (Nova UI): Different functions to manipulate an asset's preview in the detail view. The preview controls are displayed in a semi-transparent overlay in the preview area.

Q

quick search (Advanced UI): Another term for full text search. Looks for assets which match the search term within any asset criteria or metadata.

R

read-only user (Advanced UI): A type of CELUM Content user in the Advanced UI who only has permission to view, search and download content. A read-only user cannot edit metadata or asset content.

referencing drop-down field (NOVA UI): Such fields serve to create links between assets and several collections. The value of a referencing drop-down field is always a reference to an existing collection (or multiple collections) in the system.

role (Advanced UI): A role defines a set of local permissions. You assign a role to a user on a specific node. The permissions from the role are then only applied to the given user on the given node or collection. Roles can be defined in Advanced UI.

role-based permission: Another term for a local permission. In this case, the local permissions are defined via roles.

root collection (Nova UI): The collection on the highest level of the tree, e.g. the collection named after the currently selected collection type, which contains all other collections. Sometimes also referred to in context of referencing drop-down fields, in which all collection within a configured "root collection" can be selected as values.

root level (Advanced UI): The highest level of the navigation tree's hierarchy.

S

search panel (Nova UI): The left-most area of the Advanced Search, which lists all filter widgets and allows you to select and activate them.

search restriction (Advanced UI): A different way to configure search widgets.

search widget (Advanced UI): A search widget contains search criteria pertaining to a specific asset information field or property. You can add multiple search widgets to narrow down search results.

Share dialog: The Share dialog offers options to share selected objects either with internal CELUM Content users or with external people.

sidebar: The sidebar shows a small preview and general information about a selected object.

snackbar (Nova UI): A snackbar, or snackbar notification, is a small UI element which informs you for example about upload progress or special events that occurred in the application. Snackbars can be hidden manually or automatically.

stage (Advanced UI): CELUM-proprietary term for media platforms in the context of the Backstage module. Any given media platform is generally called a stage.

stage handler (Advanced UI): Defines the scope and other important data for a synchronization to a media platform/stage with Backstage.

stage handler master (Advanced UI): Defines important data for a synchronization to a media platform/stage with Backstage. Can be used as a template for multiple stage handlers, e.g. to define the same set of credentials for multiple synchronizations.

start page widget (Advanced UI): A widget on the "Home" tab in the Advanced UI for quickly accessing specific objects or functions.

strict metadata validation (Nova UI): A collection with "strict" metadata validation does not accept invalid information fields in its metadata or the metadata of its assets. You also cannot change the asset type for assets inside a strict collection.

strict validation level (Advanced UI): A node with "strict" validation level does not accept invalid information fields in its metadata or the metadata of its assets. You also cannot change the asset type for assets inside a strict node.

sub-collection (Nova UI): Synonym of "child collection". A collection located inside a different collection.

sub-node (Advanced UI): A node that is located inside another node in the navigation tree.

super-administrator (Advanced UI): An administrator user in the Advanced UI who can also access the Configuration Management Application and other super-administrator functions.

system bar: A narrow bar on the left side of the application window. Contains the logout button, user avatar and help button.

T

tag (Nova UI): A tag can be used to categorize and label an asset. Tags can be created on the fly and added to as many assets as you want.

tag-cloud collection (Nova UI): The tag-cloud collection contains all existing tags. You are not allowed to delete it, otherwise all existing tags will be lost.

toggle button: A special UI element which allows you to switch a setting between two states (on/off).

tolerant metadata validation (Nova UI): A collection with "tolerant" metadata validation accepts invalid information fields in its metadata and the metadata of its assets. You can change the asset type for assets inside a tolerant collection.

tolerant validation level (Advanced UI): A node with "tolerant" validation level accepts invalid information fields in its metadata and the metadata of its assets. You can change the asset type for assets inside a tolerant node.

tree (Nova UI): The navigation tree which contains all collections in the system.

U

upload basket (Advanced UI): The upload basket is used for processing assets when you first upload their files to CELUM Content. The upload basket is located in the dock.

upload wizard (Nova UI): An overlay with similar functionality as the metadata wizard. You use the upload wizard during an upload process to handle duplicates and edit the new assets' metadata before releasing them into the system.

V

validation level (Advanced UI): The validation level describes the way in which the metadata of a node and the assets within are validated. There are two validation levels for nodes: "Strict" and "Tolerant". You can only add assets to a strict node if all required asset information fields are filled. The assets' metadata status doesn't matter for tolerant nodes.

W

Workroom: A Workroom in CELUM Work is a digital working space that combines files, tasks and people for effective teamwork.