



User Help

Digital Asset Management with Xpublisher on Fabasoft PROCECO

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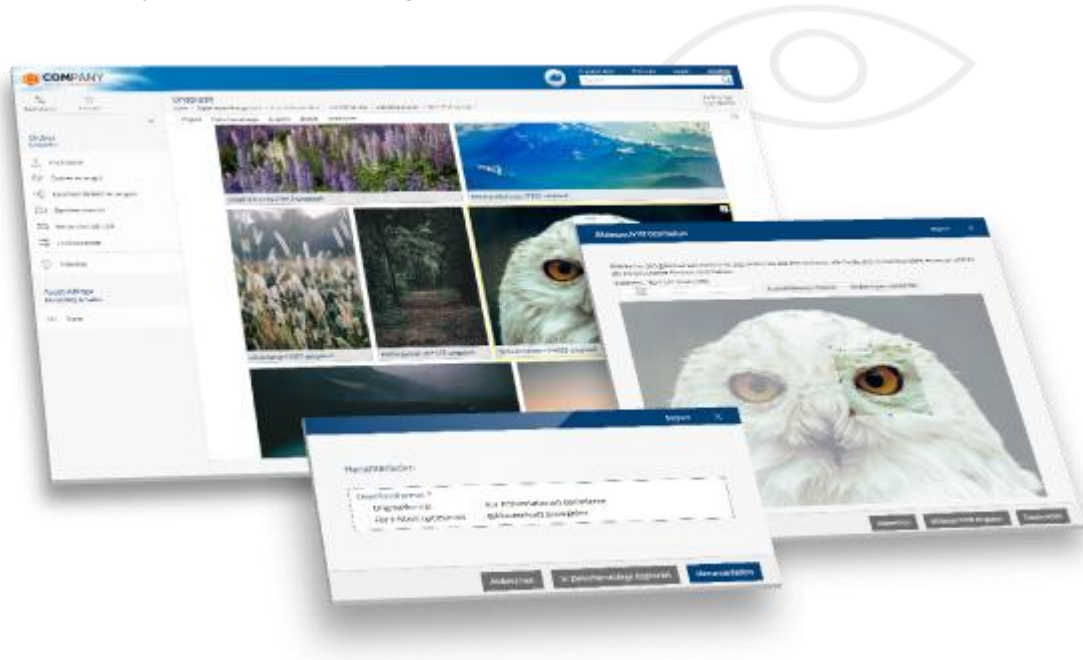
Contents

1 Introduction	5
2 Preparation	5
2.1 Initial Registration.....	5
2.2 Basic Operation	6
2.2.1 Structure of the Web Client.....	6
2.2.2 Execute Actions	8
2.2.3 Fabasoft Cloud Client.....	8
2.3 Organizational Management.....	8
2.3.1 Create Users	8
2.3.2 Create Teams.....	9
2.3.3 Authorize Teams	10
2.4 Your Start with Digital Asset Management.....	10
3 Structuring Elements of the DAM	10
4 DAM Dashboard	11
5 Asset Shelves	12
5.1 Link between Asset Shelves and Fabasoft Cloud Teamrooms	12
5.2 Settings	13
5.3 Folders and External Areas	14
5.3.1 Folder.....	14
5.3.2 External Areas	14
6 Assets	15
6.1 Metadata	15
6.2 Indexing Assets	16
6.2.1 Terms.....	17
6.2.2 Tags/Tagging	17
6.3 (Re)register Assets.....	17
6.4 License Status	18
6.5 Status	18
6.6 Convert Assets	18
6.7 Downloading Assets	18
6.8 Public Links to Assets	19
7 Xeditor	19

7.1 Create Xeditor Documents	19
7.2 Edit Xeditor Documents	19
7.3 Images.....	21
7.4 Metadata	21
7.5 Import XML Documents.....	21
7.5.1 Manuel Import.....	21
7.5.2 Automated Import.....	22
7.6 XML Export.....	22
7.7 Text modules in the Xeditor	23
7.7.1 Creating text modules	23
7.7.1 Using text modules	23
8 Transfer Collections	24
8.1 Create a Transfer Collection	24
8.2 Close a Transfer Collection	24
9 Administration Help: DAM Configuration	24
9.1 Areas	24
9.2 Actions	26
9.3 Settings	26
9.4 Registering Assets	29
9.5 Licensing.....	29
9.6 Download Formats.....	30
9.7 Status	30
9.8 Thesauri.....	31
9.9 Tags	32
9.10 Configuration of Adobe Stock.....	32

1 Introduction

Digital Asset Management (DAM) with Xpublisher on Fabasoft PROCECO is the intelligent, central, continuously available software system for your digital assets. Global teams as well as agencies, suppliers and resellers can quickly find the right content, use it consistently, administer and edit it with ease and comfortably release and share it. Xeditor, a professional online XML editor is integrated. It enables authors to intuitively create and edit structured content in XML format without in-depth technical knowledge.



2 Preparation

This chapter supports you in getting started. You will get an overview of the basic setup and operation of the system.

2.1 Initial Registration

After completing the purchase of the solution, you will receive a registration link for initial registration from Fabasoft Cloud Sales by e-mail. Enter your credentials and log in to Fabasoft Cloud.

In the course of your first login, the welcome screen may display notifications. For example, that data still needs to be completed.

This concerns:

- the registration of a person to be notified in the event of a personal data breach (privacy officer)
- the definition of important contact details of the organization
- the designation of a compliance manager
- the installation of the Fabasoft Cloud Client

For more information please refer to chapter 2.2.3 "Fabasoft Cloud Client".

Click on the link in the Welcome screen to execute the corresponding action.

Note: The Welcome screen is only displayed when there are notifications for you.

2.2 Basic Operation

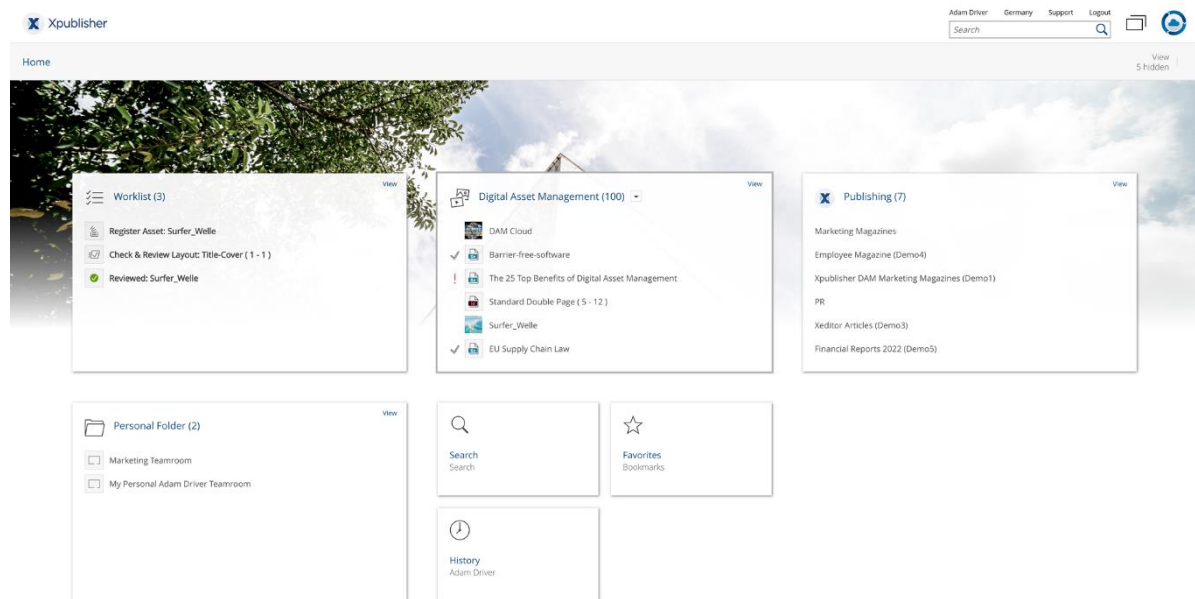
The following chapters provides initial guidance for operating the web client.

2.2.1 Structure of the Web Client

This chapter will familiarize you with the structure of the web client and how to navigate the system.

Home

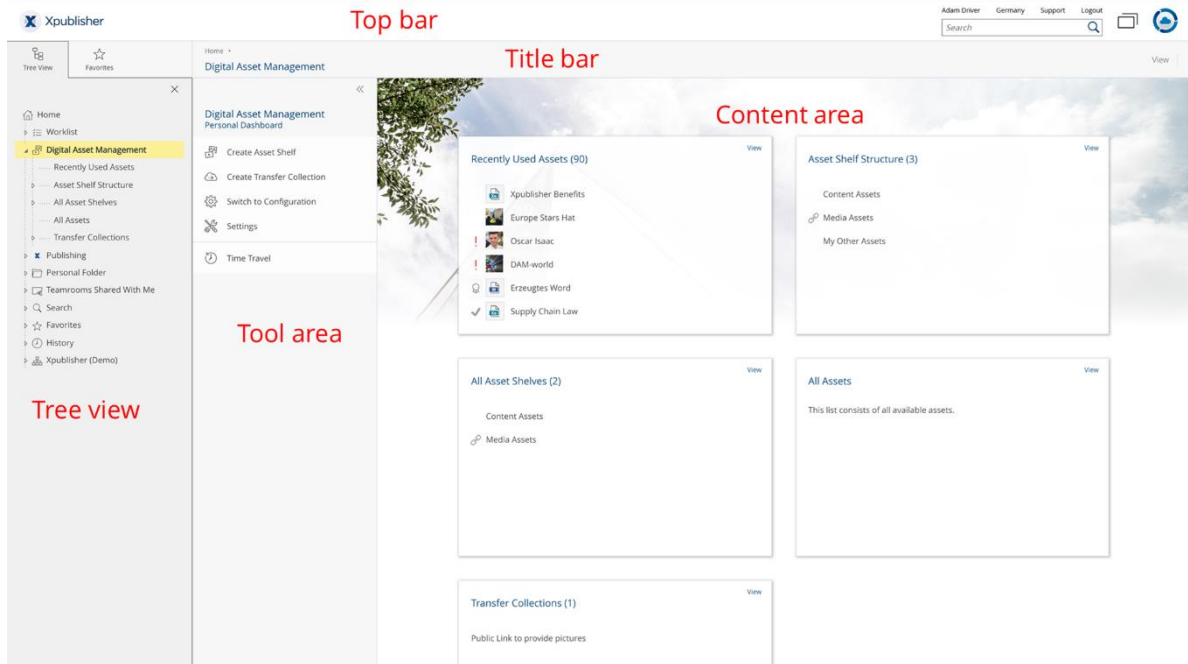
After successfully logging in, the user will see his or her personal "Home" dashboard.



Depending on which solutions you have been licensed for and your personal settings, various widgets (e.g. "Personal Folder", "Worklist") are displayed. The dashboard concept of the home area offers you possibilities for individualization. For example, you can show or hide the widgets and adjust their size and order.

Digital Asset Management Dashboard

By clicking on the "Digital Asset Management" widget, you will reach your personal digital asset management dashboard, which will be used to explain the general structure of the web client below.



The web client is divided into the following areas:

- **Top bar**

In the top bar you will find your organization logo on the left (if set up) and on the right the user's account menu, the data location menu, the support button, the logout button, the quick access button, the home button and the search bar.

Note:

- The top and title bar are always displayed - regardless of where you navigate within the system. This gives you access to the actions there (e.g. support, search) at any time.
- You can find more information about the powerful full-text search with Mindbreeze in the Fabasoft Cloud user help in the chapter "[Searching with Mindbreeze](#)".

- **Title bar**

The title bar contains the breadcrumbs of the currently opened hierarchy. If you navigate in a widget within a solution, the other widgets of the same level are displayed as tabs.

- **Content area**

The content area generally displays the content of the current object. This can be, for example, the widgets of the home or DAM dashboard, the subfolders and files of a folder, or the preview of a document.

- **Tool area**

The tool area is basically available everywhere in the system except on the "Home" screen. In the tool area you will find context-dependent "actions". Common actions in the tool area are, "Team", "Settings", or "Time Travel".

- **Tree view or Favorites**

Furthermore, you can display or hide the "Tree View" or "Favorites" area anywhere in the system, except on the "Home" screen. The tree view allows you to quickly orient yourself and navigate within the system. You can add frequently used objects (e.g. folders or documents) to your favorites. To do so, navigate to the desired object. In the Favorites area, you will then be offered an action to add it. Alternatively, you can right-click on the object and select the action "Add to Favorites" within "Extras".

Note: Up to three column areas can be displayed side by side (e.g. "Tree View", "Actions" and "Team").

2.2.2 Execute Actions

The following basic options are available:

- Left-click the desired button to execute the corresponding action.
- The Actions tool always contains the most important actions in the current context. The actions refer to the object displayed in the content area. For example, if you are in an Xeditor document, you can open the Xeditor document for editing using the "Edit" action in the Xeditor.
- You can open the context menu of an element by clicking the right mouse button. Usually, in addition to the actions that are also offered in the tool area, you will find other less frequently used actions in the context menu.
 - Context menu of objects
Execute a right-click on an object in the content area. The context menu of this object will be opened.
 - Title bar context menu
Execute a right-click on the title bar. The context menu of the object currently displayed in the content area opens.
 - Background context menu
When you are in a Teamroom or folder, right-click in an empty area within the content area. The context menu contains actions relevant to working with lists (for example, create a new item in the list).
- To select entries in a list, click the checkbox of the corresponding entries. For example, you can execute a context menu command on several objects.

2.2.3 Fabasoft Cloud Client

To work efficiently, the installation of the native Fabasoft Cloud Client is highly recommended. The Fabasoft Cloud Client is available for Microsoft Windows, Apple macOS and Ubuntu.

You can start the installation via the web browser status (Account menu (your user name) > "Status" > "Web browser status"). If your organizational policies do not allow installation on your end device, please contact your IT support.

Further information can be found in the white paper "[Fabasoft Cloud Client](#)".

2.3 Organizational Management

Initially, there is one member (the organization owner) in a cloud organization. This member is automatically authorized to manage the organization, for which purpose a widget "Cloud organization" is placed on "Home".

2.3.1 Create Users

To create a user, proceed as follows:

1. Navigate to your organization via "Home" and then to the "Membership" section.
2. Click on the "Add Members" action.

3. In the *User (Email Address)* field, enter the user's email address.
4. Click "Invite new user" in the drop-down menu.
5. Enter the *first name* and *last name* and click "Create".
6. To add multiple members at once, repeat steps 3 through 5.
7. Click the "Add" button.
8. Assign the full access edition to the users and click "Assign".
9. Click "Invite" to send a membership confirmation email per member.

The added members can register for the first time via the invitation emails sent.

Note: Via the "Import Members" action you can also create members collectively via CSV file import. In the corresponding action dialog, you have the possibility to download a CSV template.

2.3.2 Create Teams

In addition to the automatically created teams "Fabasoft Cloud Enterprise (Full Access)", "Fabasoft Cloud Enterprise (Read Access + Comments)" and "Fabasoft Cloud Enterprise (Access for External Members)", it is recommended - especially if your organization also uses the publishing solution - to create the following three teams:

- *DAM Administrators*
Members of this team should be able to edit the DAM configuration (generally: editorial department management). They should also be given all rights at the shelf-level.
- *DAM Users*
Members of this team should be able to use the DAM (generally: members of the editorial department).
- *DAM Users (External)*
Members of this team should have access to external areas where they have been authorized (generally: suppliers, customers and external employees).

The purpose of creating these teams is to simplify the initial setup, administration, and use of the DAM solution through role-based management of access rights. To create the teams, follow these steps:

1. Navigate to your organization via "Home" and then to the "Teams" section via the "Membership" section.
2. Click on the "Create Team" action.
3. In the *Name* field, enter the value "DAM Administrators" and click Create.
4. Navigate to the team you just created and click "Add Team Members".
5. In the *Users* field, select the desired members.
Note: In a pilot phase, add only the designated users. You can display a list of all available members by entering an asterisk (*) and then pressing the Enter key, and select the desired members by clicking on them.
6. Click on "Add".

Repeat the process to additionally create the "DAM Users" team and the "DAM Users (External)" team.

2.3.3 Authorize Teams

To authorize the teams in the DAM configuration, do the following:

1. Navigate via "Home" to your organization, then to the "Licenses"/"License administration" area and then to the "App Configurations" area.
2. Select the "DAM Configuration".
3. Click on the "Team" action.
4. Click the plus icon next to the App Administrator role to open the search box.
5. Type "DAM Administrators" and press Enter to search for the team you created earlier.
6. Choose the DAM Administrators team in the drop-down menu.
7. Repeat the process and add the "DAM Users" team to the "App User" role.
8. **Optional:** Remove the automatically added organization owner (context menu command "Remove") to ensure a consistent role-based authorization.

For the authorized members, the Digital Asset Management dashboard is placed on Home. If roles are assigned while users are logged in, users must reload the page (F5 key) for the dashboard to be placed.

At the end of a pilot phase, you can create additional DAM user teams, if necessary, to authorize different users (groups) in asset-shelves and external areas.

Note:

- If you have accidentally authorized the wrong team or user, click "Remove" in the context menu of the team member.
- If your organization has purchased both the DAM and the publishing solution, you can create and authorize teams for the publishing solution in the same way. If the same users are to administer or use both solutions, you can also use the initially created teams.
- Beyond the initial setup of the system, you will find general information on organization management in the ["Fabasoft Cloud Administration Help"](#).

2.4 Your Start with Digital Asset Management

After the initial access-rights have been assigned by the organization owner (see chapter 2.3.3 "Authorize Teams"), the defined DAM administrators can start with the initial setup (see also chapter 9 "Administration Help: DAM Configuration"). If you are a regular DAM user, continue with the following chapter.

3 Structuring Elements of the DAM

The main structuring elements of the DAM are:

- *DAM Dashboard*
The Dashboard is the central access point to the DAM for DAM users. When a user is added to the DAM configuration as an app user, a dashboard is automatically created and placed on "Home" as a widget ("Digital Asset Management").
- *DAM Configuration*
In the DAM configuration, general settings are defined that apply to assets and asset-shelves. You must be an app administrator to edit the DAM configuration. You can access the DAM

configuration by navigating to the DAM dashboard on Home and then clicking the "Switch to Configuration" action.

- **Asset Shelves**

Asset shelves are used to manage digital content in a structured way and to define access permissions. Asset shelves allow you to create a hierarchically nested shelf structure, and you can define access permissions granularly for each asset shelf. You can also use folders for sub structuring. Folders inherit the access permission settings of the parent asset shelf.

- **Assets**

Assets are digital content such as documents, images or videos. In addition to the content, metadata is also stored with the asset. In particular, license information can be stored.

- **Transfer Collections**

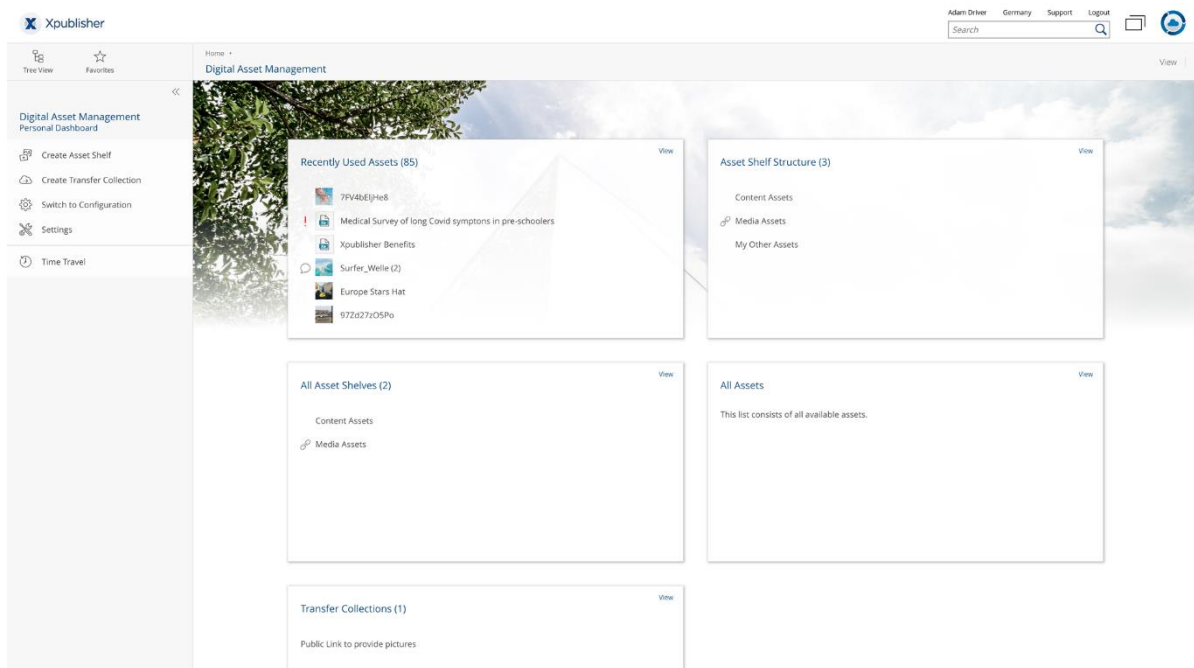
Transfer collections are used to collect assets from different folders and shelves and make them available together, as a public link.

- **External Areas**

External areas can be defined for external users who should only have access to certain areas of the system. External areas allow collaboration on the basis of individual assets.

4 DAM Dashboard

The DAM Dashboard is your access point to the DAM.



When you are added as an app user to a DAM configuration, a dashboard is automatically created and placed as a widget ("Digital Asset Management") on "Home". When you are removed as an app user, the dashboard/widget will also get removed.

The DAM dashboard is divided into the following areas:

- **Recently Used Assets**

Displays assets you have recently used.

- **Asset Shelf Structure**

Displays the top-level asset shelves that are used to manage assets.

- *All Asset Shelves*
Displays all asset shelves independent of the level.
- *All Assets*
This widget is your entry point to the search-based list of all available assets.
- *Transfer Collections*
Displays your transfer collections, if at least one transfer collection exists.

Note: Users always see only those objects for which they are authorized.

You can execute the following actions:

- *Create Asset Deposit*
You can create new asset shelves using the "Create Asset Shelf" action.
- *Restore Personal Shelf*
You can restore your personal shelf.
Note: This action is only available if you are a DAM and Publishing user and have removed your personal Shelf.
- *Create transfer collection*
You can use the "Create Transfer Collection" action to create new transfer collections. Transfer collections are used to collect assets from different folders and shelves and share them as a public link.
- *Switch to Configuration*
Via "Switch to Configuration" action you can switch to your DAM Configuration.
- *Settings*
Using the "Settings" action, you can set general properties of the DAM Dashboard (for example, the logo or the notification setting).

5 Asset Shelves

Asset shelves are used to manage digital content in a structured way and to define access rights for effective collaboration.

You can store your content directly in the top-level shelf or create a hierarchically nested shelf structure with additional asset shelves, granularly defining access permissions for each asset shelf.

5.1 Link between Asset Shelves and Fabasoft Cloud Teamrooms

Asset shelves are based on the concept of Fabasoft Cloud Teamrooms and accordingly have their functionalities and setting options. The functional scope of Teamrooms is described in detail in the general Fabasoft Cloud user help in the chapter ["Collaboration with Teamrooms"](#) and includes the following functionalities, among others:

- Create and structure Teamrooms.
- Create, edit, organize documents in Teamrooms, etc..
- Granular definition of access rights on a user and team/role basis.

The main difference to Teamrooms is the additional functionality of asset shelves: With the help of the "Asset Registration" and "Licensing" functionalities, users can be enforced to consistently maintain metadata.

Note:

- Administrators can (de)enable new asset registration in the DAM configuration settings. For more details, please refer to chapter 9.4 "Registering Assets".
- Administrators can (de)activate licensing in the DAM configuration settings. More details can be found in chapter 9.5 "Licensing".
- The Fabasoft Cloud Client enables automatic synchronization of folder structures (Teamrooms, folders, asset shelves, external areas) and their content with the local file system. To do this, select the "Synchronize" action in the action bar. You can find more details on this in the Fabasoft Cloud user help in the "[Synchronization](#)" chapter.

5.2 Settings

In addition to the Teamrooms' settings, the settings described below are available for Asset Shelves. To set them, navigate to an asset shelf and select the "Settings" action in the tool area.

Tab "Contract/License Documents"

- *Contract/License Documents*
The stored documents can be referenced in the assets.

Tab "Default Values"

- *Default Thesaurus for New Terms*
If a default thesaurus is specified, new terms can be created directly during indexing.
- *Default Categories*
When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.

Note: Here you can, for example, assign a metadata form created in the configuration for new assets in this asset shelf. This will then be available as an additional tab for all newly created/uploaded assets of the selected object class for this asset shelf.

- *Default Processes*
When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.

Note: Here, for example, you can assign a default BPMN process modeled in the configuration for the asset shelf. This process is started automatically as soon as an object of the selected object class is created or uploaded in the corresponding asset shelf.

- *Additional Default Background Tasks*
When an object is created, the specified background tasks are assigned.

Note:

- The default properties overwrite or extend the settings in the configuration.
- In order to be able to assign default values (e.g. processes or metadata forms), these must be created in advance by DAM administrators in the configuration and released for use.
- Further settings for asset shelves that are also available for Teamrooms, such as security settings, can be found in the general Fabasoft Cloud user help.

5.3 Folders and External Areas

For further hierarchical (sub-) structuring of your asset shelf-system, folders and external areas are available in addition to asset shelves.

5.3.1 Folder

The main difference between folders and asset shelves is that folders inherit the settings from the parent asset shelf (in which they are created). In contrast, separate settings apply to each (sub-) asset shelf - especially with regard to access permissions - and must be defined accordingly in each case. This means that initially only the user who created the asset shelf is authorized with all rights. In order to work with other users or user groups at the asset shelf level, they must first be authorized. In newly created folders, however, all team members of the parent asset shelf are already authorized. This setting cannot be overridden for folders. We therefore recommend nesting asset shelves as long as the access permissions can change. Then the team can use folders for further sub structuring. To create a folder, select corresponding action in the Asset Shelf's tool area.

Convert Folder

If you want to change access permissions for a folder, you need to convert it to an asset shelf. To do so, proceed as follows:

1. Navigate to your folder.
2. Click "Tools" in the context menu of the folder.
3. In the submenu there, click the "Convert to" command.
4. Choose between "Asset Shelf" and "External Area".
5. Select whether you want to apply the security settings of the parent asset shelf and confirm with "Convert".

Note: You can also convert asset shelves or external areas into folders.

5.3.2 External Areas

External areas can be created in asset shelves. The team defined in the parent asset shelf automatically is authorized in the external area. Users with all rights in the asset shelf can extend the team of the external area. This allows, for example, close cooperation with an external graphics agency, which should only have access to the external area.

To create an External Area, proceed as follows:

1. In your Asset Shelf structure, navigate to the area where you want to create the External Area.
2. Select the "Create External Area" action in the tool area.
3. Select a name and if necessary, a subject, confirm by clicking "Next".
4. Navigate to your created External Area and select the "Team" action in the tool area. Here you can extend the access permission inherited from the asset shelf to include external users or user groups.

6 Assets

Assets are digital content such as images, documents or videos. You can create them media-neutrally in asset shelves, edit and manage them collaboratively, and enrich them semantically with metadata.

6.1 Metadata

Each cloud object has metadata like e.g. name, size etc. The metadata of a cloud object can be found in its properties. Metadata can be determined automatically by the system (e.g. file size, modification date) or maintained manually (e.g. category, subject). Depending on the object class (or file type) of their asset, the (metadata) fields available in the properties differ. For example, Xeditor documents are described by the XML schema, while images are described by typical image properties such as Exif properties.

For assets that are located in an asset shelf in the DAM, you will find the additional tab "Digital Asset" in the asset's properties. Which of the following (metadata) fields are displayed there is defined in the DAM configuration.

- *Name*
The name of the asset.
 - *Alternate name*
Specifies another name for the asset.
 - *Subject*
Sets a free text as the subject for the asset.
 - *Tags*
The tags are used to index the asset.
 - *Terms*
The terms are used to index the asset.
 - *Description*
The description of the asset as free text.
 - *Location*
The location of the asset (for example, the location where an image was taken).
 - *Date*
The date of the asset (for example, the date an image was taken).
 - *Location*
Displays the location information determined from the GPS coordinates.
 - *Licensed From*
The asset is licensed as of the specified date. Assets without a valid license cannot be downloaded (except by app administrators).
 - *Licensed Until*
The asset is licensed up to the specified date. Assets with an expired license cannot be downloaded (except by app administrators).
- Note:** If neither *Licensed From* nor *Licensed Until* is specified, all use cases can be executed as if the asset had a valid license. If only *Licensed From* is specified, the asset is licensed as of that date (with no expiration date). If only *Licensed Until* is specified, the asset is licensed until this time (without a start date).

- *License Type*
Defines the license type of the asset. The available license types are defined in the DAM configuration. Usage types can be stored with the license type. These are pre-filled when the license is selected.
- *Contract/License Document*
Defines the contract or license document of the asset.
- *License Text*
The license text as free text.
- *Usable for*
Defines the context in which the asset may be used. The available usage types are defined in the DAM configuration.
- *Right of use*
The right of use of the asset as free text.
- *Copyright/Originator*
The copyright or originator of the asset as free text.
- *Creator*
The creator of the asset.
- *Provider*
The provider of the asset.
- *E-mail Address*
The email address of the provider.
- *Address*
The address of the provider.
- *Source*
The source of the asset.
- *Responsible for the registration*
This field can be evaluated in the registration workflow to determine the user responsible for registration.
- *Registered by*
User who executed the last-actual registration.
Note: This field is displayed only if the asset has already been registered.

Note:

- For videos, the *Generate Preview Image at Second* field on the Content tab lets you specify at which second the preview image is generated.
- Image properties (Exif, IPTC, XMP) of JPG and PNG images can be modified using the Edit Image Properties action (if defined accordingly in the DAM configuration).
- Beyond the metadata fields available per default, administrators can create individual metadata forms in the configuration. More information on this can be found in the general Fabasoft Cloud user help in the chapter "[Creating a form](#)".

6.2 Indexing Assets

Digital Asset Management from Xpublisher offers two options for indexing: terms, and tags.

6.2.1 Terms

To index your assets using terms, follow these steps:

1. Select the assets to be indexed and open the context menu by clicking the right mouse button.
2. Select the "Properties" action for only one selected asset or "Edit properties" for multiple selection.
3. Navigate to the "General" tab.
4. Type in the "Terms" field to search for terms or create new ones. Alternatively, you can use the "Select terms" field to select your terms from a thesaurus from the hierarchy tree.

Note: Terms are preconfigured in the DAM configuration in the Thesaurus section. Administrators can define here if the feature is available for users, import and extend existing thesauri, create their own keyword trees and define if users are allowed to add their own terms - in addition to already existing terms. More information on this can be found in chapter 9.8 "Thesauri".

6.2.2 Tags/Tagging

To index your assets using tags, follow these steps:

1. Select the assets you want to index.
2. In the context menu, select the "Properties" command (for only one selected asset) or "Edit Properties" (for multiple selection).
3. Navigate to the "General" tab.
4. Type in the "Tags" field to search for and select tags.

Note: Tags are fully preconfigured in the DAM configuration in the Tags section by administrators. For more information, see chapter 9.9 "Tags". Unlike terms, users can only use existing tags created by administrators and cannot add new ones.

6.3 (Re)register Assets

Assets that have not been assigned to an asset shelf can be registered to an asset shelf. To do this, navigate to the desired asset and execute the context menu command "Register as Digital Asset". Specify an asset shelf as the destination. In the registration dialog, you will be prompted to maintain metadata. Metadata that can be extracted from the asset (such as Exif) is automatically taken over. The corresponding fields are highlighted in color and can be modified if necessary. For a successful registration, all metadata defined as mandatory fields must have been maintained. This also includes mandatory fields of individually created metadata forms. The registration process is designed to ensure that important metadata is captured consistently. This improves the discoverability of your assets and ensures media-neutral management via metadata.

Note:

- To assign an asset to an asset shelf, you can alternatively cut the asset and insert it into the asset shelf.
- The registration of new assets can be activated and configured in the DAM configuration settings. It is also possible to define which metadata fields are displayed and which are mandatory fields. More information on this can be found in chapter 9.4 "Registering Assets".
- You can also register multiple assets or entire folders of assets at once.
 - The specified values can be applied to all assets ("Apply Values for All Digital Assets" button).

- The name prefix is added to all asset names.
- In the Digital Assets field, the values of individual assets can also be changed. If you want to set common values and also change individual assets, always apply the common values first ("Apply Values for All Digital Assets" button) before changing the values of individual assets.
- If you register assets via an inbox, you can use the "Define Property value" action to store the desired destination shelf in the *Preferred Registration Target* property. This means that when you register, not the recently used shelf is suggested, but the shelf stored in the property.

Assets that are already assigned to an asset shelf can be re-registered to another asset shelf. In the course of re-registration, entering metadata is possible. To do so, navigate to the desired asset and execute the "Re-Register" context menu command. Define an asset shelf as target.

6.4 License Status

Assets can have the following symbols:

- *Yellow warning triangle* (license information incomplete)
Not all mandatory fields with regard to license contain a value.
- *Red callsign* (no valid license)
Current date is before *Licensed From* or after *Licensed Until*.

Note: The license status icons are only displayed if licensing has been enabled by administrators in the DAM configuration settings. For more details please refer to chapter 9.5 "Licensing".

6.5 Status

Assets can have a status (e.g. "In Progress" or "Approved"). Status cannot be set manually by users, but are set automatically by completing tasks as part of assigned processes. Only if an asset has a status, it is displayed in the "Processing status" field in the asset's properties in the "General" tab.

Note: Status are managed entirely by administrators in the configuration. This includes both the creation of status and the linking of status changes to the completion of tasks as part of default processes. More details can be found in chapter 9.7 "Status".

6.6 Convert Assets

You can convert video files to MP4, OGV or WEBM. For audio files, MP3 and OGG are available. To do so, the "Save as <format>" context menu commands are available. The conversion runs in the background and may take longer depending on the size of the source file. The result of the conversion can be found in the properties of the multimedia file, on the "Content" tab in the *File in Different Formats* field.

6.7 Downloading Assets

When you download an asset, you can select the download format. The download formats offered are those defined in the DAM configuration that are appropriate for the type of asset and have been approved for you to use.

Note:

- If you selected multiple assets, they will be downloaded as a ZIP file.
- If you download a single image, the "Copy to clipboard" button is also available.

- If you select an image download format that allows you to customize the image as you download it, you can use the Edit button to scale the image and specify a crop.
- When you select different types of assets to download, download formats are offered according to the selected types. Only those assets that can be converted to the selected download format are downloaded.
- If videos or audios are not yet available in the desired download format, a corresponding message is displayed and the conversion is started in the background. After the conversion is complete, you can start the download again.

6.8 Public Links to Assets

When you create a public link to an asset ("Create Public Link" context menu command), you can also define the download format.

Note: When creating a public link to a folder with different types of assets, download formats are offered according to the contained types. Only those assets are included in the public link that can be converted to the selected download format.

7 Xeditor

Xeditor allows editing and creating structured content directly in the web browser.

Note: In order to use Xeditor properly, at least one XML schema configuration must have been stored.

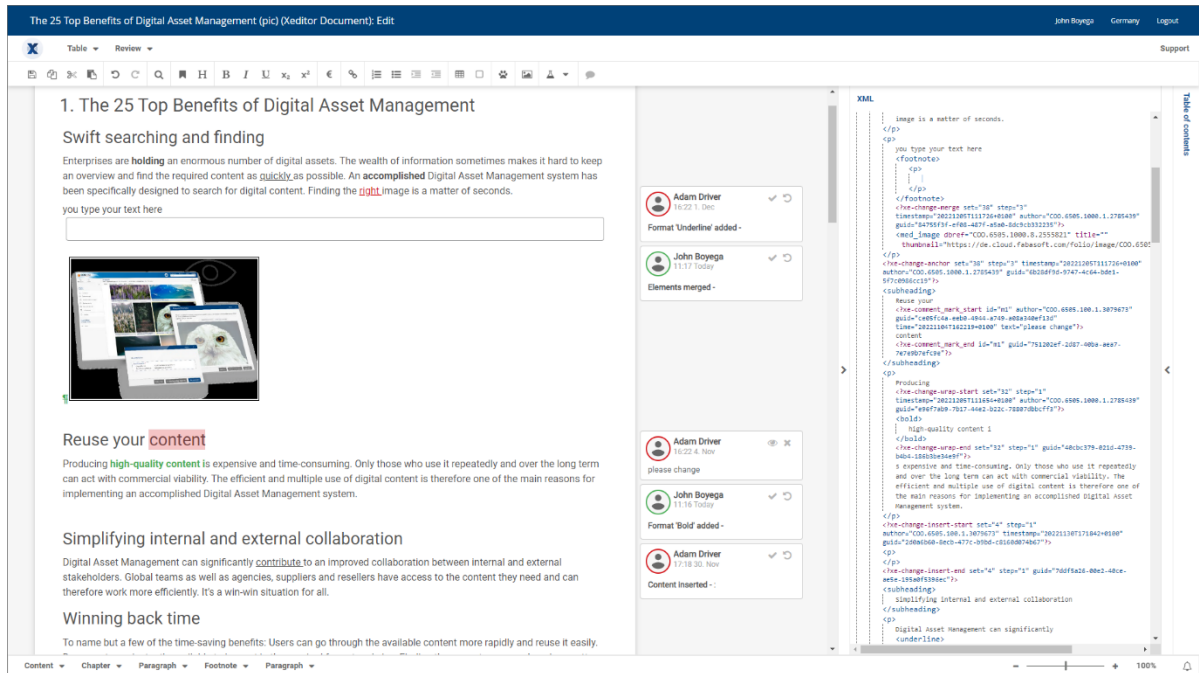
7.1 Create Xeditor Documents

To create an Xeditor document, proceed as follows:

1. Navigate to the asset shelf where you want to create the Xeditor document.
2. In the content area of your clipboard, click "Add Entry".
3. Select the "New" option.
4. Select "Xeditor Document" as the object class.
5. Choose a "Name" and select the desired "XML Schema".
6. Confirm with "Next".

7.2 Edit Xeditor Documents

To edit an Xeditor document, select the "Edit" action in the tool area. The XML document will be opened in Xeditor as a new tab in your browser.



Workspaces

- In the main area the document is displayed according to the specified style sheet and can be edited.
- On the right, the "Table of Contents", which displays the chapters of the document as a tree, can be displayed. Alternatively, the attributes of the currently selected element can be displayed under "Attributes" and, if necessary, attributes defined in the style sheet can be added.
- On the right, you can also display the XML code that is automatically being generated in real time.

Toolbar

- **General**
By default, the "Save", "Copy", "Cut", "Paste", "Undo", "Redo" and "Search/Replace" buttons are displayed.
- **Formatting**
Buttons for formatting (e.g. bold, underline, subscript) your selected content.
- **Insert elements**
Allows to insert for example chapters, tables, formulas, links, lists, footnotes, comments or images.
- **Table**
In the drop-down menu you can find commands for editing (delete rows, join, etc.) tables.
- **Review**
In the drop-down menu you can find commands to enable change tracking and settings to display comments and tags.

Footbar

- **XML path**
Displays the path to the selected XML element. The drop-down menu at the corresponding path elements can be used to execute actions such as "Insert element" or "Delete".

- *Notifications*
The bell icon can be used to display notifications about a faulty XML structure, for example.
- *Zoom*
You can zoom in and out the displayed content within the workspace.

Note:

- You can also use the context menu of the right mouse button to make edits in your documents.
- The available XML elements are determined by the XML Schema of the style sheet used. Also, the available actions in the tool and footer, as well as the workspaces, may differ depending on the XML schema.

When you create a new document, you start with a topic element that represents the document. You can subordinate other topic elements to this topic element to represent the chapters of the document. A topic element generally contains a title element, a body element (which in turn contains the paragraph elements), and possibly other topic elements as subchapters. In general, with the schema configured, no deep technical knowledge is required to create structured XML content. Editing Xeditor documents is strongly oriented towards the familiar operation of classic word processing programs.

7.3 Images

With Xeditor you can search your DAM for images and insert them in the document.

To insert an image, proceed as follows:

1. Position the cursor at the desired place in the document.
2. Click the "Image" button in the toolbar.
3. Select an image from the drop-down list or click the Select Image button to choose an image from your asset shelf.
4. Click the "Insert" button.

A preview of the image is displayed at the cursor position.

7.4 Metadata

In the properties of Xeditor documents you will find their object class specific metadata fields in the Xeditor Document tab. While the "XML Schema" has already been defined when creating the document, here you have the possibility to define the "Document Language".

Note: In the "Content" tab you have the possibility to download the automatically generated xml structure.

7.5 Import XML Documents

7.5.1 Manuel Import

To import existing XML documents from your local file system into the system to be able to edit them with the Xeditor, proceed as follows:

1. Create an (empty) Xeditor document as described in chapter 7.1 "Create Xeditor Documents".

2. Click the "Properties" command in the context menu of your (empty) Xeditor document.
3. Navigate to the "Content" tab and select the "Select file" action there.
4. Browse your file system for the desired XML document and confirm with "Next".

Note: To successfully import an existing XML document, its XML schema must match that of the Xeditor. Otherwise you will get displayed an error message when you open the Xeditor document.

7.5.2 Automated Import

Another option for importing XML documents is available to you via inbox folders. This is a folder that monitors the data stored there and processes it automatically according to defined rules. To use an inbox folder to import XML files, proceed as follows:

1. Create an inbox folder within an asset file via the menu under "Add entry" and "New".
2. Select the "Inbox folder" object class in the following "What do you want to create?" dialog.
3. Navigate to the newly created inbox folder by clicking on it in the list.
4. Select the "Manage rules" action in the action menu
5. Create a new rule in the list of rules using the "Add entry" / "New" action.
6. In the following dialog, you can name the rule and define optional conditions. Click on "Add entry" / "New" in the list of actions.
7. Select the action type "Zip XML Import (asynchronous)".
8. In the following dialog, you can define a list of available Xeditor schemas to which the XML documents to be imported are to be assigned.
9. The "Remove DTD reference" entry can be used to automatically remove a reference from the XML documents that could cause problems during subsequent processing in the cloud.
10. An "Xpath expression" in the dialog can be used to select certain sub-elements in the XML that are to serve as root elements of new Xeditor documents.
11. The option "XML schema for split Xeditor documents" allows you to assign the sub-elements selected via the Xpath expression to a defined Xeditor schema.
12. Click on "Next" to complete the configuration of the input folder.

Notes:

- An input folder configured in this way expects a zip file containing an XML document at the top level. Optionally, there can be an "images" folder containing images referenced in the XML.
- After successful processing, image assets and Xeditor documents are created in the inbox folder, which can be processed using further inbox folder rules.

7.6 XML Export

In addition to the standard action to export asset content via the "Download" action, a further action is available for Xeditor documents. On asset shelves and folders in Digital Asset Management, it is possible to export XML data in a structured way. To do this, proceed as follows:

1. In Digital Asset Management, navigate to the asset shelf or the folder whose Xeditor documents you want to export.
2. Export the documents and all referenced images by right-clicking on the folder and selecting the "Structured export" action.

3. A download of a zip file starts automatically with the desired result.

Note: In the zip file, there is a folder for each XML document and each referenced image with the name of the unique cloud ID. The folder contains the following content:

- A content.xml, which corresponds to the XML content of the Xeditor document.
- A metadata.xml, which contains some metadata of the exported asset
- Further subfolders with referenced content

7.7 Text modules in the Xeditor

The Xeditor offers the option of centrally defining predefined, reusable XML content as text modules and inserting them into any number of Xeditor documents. In this way, for example, disclaimers, warnings, legal notices or similar content can be maintained centrally and easily reused.

7.7.1 Creating text modules

Proceed as follows to define text modules:

1. Make sure that you have access rights to the "Templates and Presettings" application.
2. Navigate to an existing template collection and then to the "Text modules" widget.
3. Create a new text module using the "Create Text Module" action.
4. In the following dialog, select "Static Text Module (Xeditor)" as the object class that you want to create.
5. A text module is a fully-fledged Xeditor document, which is why you must select a valid Xeditor schema in the next dialog in addition to the name, the optional category and the language.
6. Click on continue to create the new text module and edit its content in the Xeditor by clicking on "Edit".
7. Finally, release the text module for users via the "Release for Usage" action.

7.7.1 Using text modules

The insertion of text modules can be activated for Xeditor documents and then offers the option of inserting defined sub-XML structures from the list of text modules. Xeditor ensures that the XML structures are permitted at the selected position and updates them each time the document is opened.

To insert a text module into a document, proceed as follows:

8. Open an Xeditor document via the "Edit" action.
9. Move the cursor in the Xeditor to the position where the text module is to be inserted. Click on the "Insert variable" button in the Xeditor toolbar.
10. In the following dialog, you can select a text module from the list of available text modules that are valid at this point and have it displayed in a preview.
11. Click on "Next" to insert the text module into the document.

Note: Text modules are displayed differently to regular content in the document. You can recognize them mainly by the information when they were last updated, which can be found on the frame of the inserted element.

8 Transfer Collections

Transfer collections are used to collect assets from different folders and shelves and make them available as a public link. Transfer collections are assigned to a single user and cannot be managed together with other users.

Note: Public links must be allowed for the asset shelves.

8.1 Create a Transfer Collection

You can use the “Create Transfer Collection” action to create transfer collections. If usage types are defined in the DAM configuration, you can define the required usage types for the transfer collection. Only assets that have all the necessary usage types can be placed in the transfer collection. If licensing is used, the assets must also have a valid license.

Place the desired assets in the transfer collection (e.g. use copy and paste or use the “Add to Transfer Collection” context menu command).

Note:

- If the asset has already been added to a transfer collection, this is indicated by a checkmark next to the respective transfer collection. Click on the corresponding transfer collection, if you want to remove the asset again.
- You can also create a new transfer collection using the context menu.

8.2 Close a Transfer Collection

After you have placed the assets, you can complete the transfer collection and create a public link using the “Close” action. The transfer collection can still be edited, but closed transfer collections are no longer offered in the context menu of assets.

Note:

- If public links are disallowed afterwards, the assets of the corresponding shelf are no longer available in the public link of the transfer collection. This is indicated by a status symbol.
- For closed transfer collections, additional public links can be created (“Manage Public Links” action).

9 Administration Help: DAM Configuration

In the DAM configuration, you can specify download formats, categories, user-defined custom forms, BPMN processes, tags, thesauri, available optional fields, general settings, and app users.

DAM configurations can be created in the organization by the organization owner, organization administrator or payment user. The defined DAM administrators can edit the corresponding DAM configurations.

Note: As app administrator, you can use the digital asset management dashboard to gain access to the corresponding configuration.

9.1 Areas

The DAM configuration is divided in following areas:

- *Download Formats*
Displays the available download formats. You can modify the download formats ("Properties" context menu command) or delete them ("Delete" context menu command).
Note: The "Original Format" cannot be deleted.
- *Asset Shelf Structure*
Displays the top-level asset shelves that are used to manage the assets.
- *All Asset Shelves*
Displays all asset shelves independent of the level.
- *External Content Sources*
Displays the configured external data sources that can be used to import assets. The "Connect Adobe Stock" action allows you to store the connection data of an Adobe Stock service account. In addition, enter a destination shelf for the assets, the maximum number of assets to be imported per import process, the interval at which an automatic import is to be performed and the media types to be imported.
In the external data source the following actions are provided:
 - *Execute Import Now*
Starts the import interactively.
 - *Deactivate Connection*
If you no longer want to import assets, you can disable the connection.
 - *Show Profile Data*
Displays your Adobe Stock profile data. Click the "Buy Credits" button to purchase additional credits from Adobe Stock.
 - *Show Purchase History*
Displays your Adobe Stock purchase history.
- *Status*
Displays the generated (editing) status.
- *Insight Apps*
Displays the generated Insight Apps.
- *Forms and Categories*
Displays the available forms and categories.
Note: To be able to store forms and categories in a different context, you must adjust the *Restrict Shortcuts Within Teamroom* field in the configuration settings accordingly.
- *Processes*
Enables the creation of BPMN processes for processing digital assets within a workflow.
- *Templates*
In the create dialog (e.g. "New" context menu command in a Teamroom) the templates are displayed according to the grouping by the template categories.
- *Text Modules*
Defined text modules can be inserted into Word documents.
- *Tags*
Displays the available tags for indexing your assets.
- *Thesauri*
Displays the thesauri in which terms can be managed for indexing your assets.

- *Presettings*
Displays the presettings provided by the configuration (display settings, search forms, time intervals).
- *Failed Background Tasks*
Displays failed background tasks (only visible, if at least one failed background task is available).
You can execute the following manual actions: "Define Next Execution", "Send Link" and "Delete".

9.2 Actions

You can execute the following actions:

- *Create Download Format*
With the "Create Download Format" action you can create download formats for images, audios, videos and documents (generic content). Depending on the type, you can specify different parameters. In addition, you can define who is entitled to use the download format.
- *Create Asset Shelf*
With the "Create Asset Shelf" action you can create new asset shelves.
- *Translations*
The "Translations" action can be used to export or import a CSV file containing the multilingual names of the customizing objects. This enables an external translation.
- *Show New Events*
This action allows app administrators to display changes and events in the current context - in this case, the DAM configuration.
- *Open Wastebasket*
With the action "Open Wastebasket" you can display objects moved to the wastebasket.
- *Settings*
With the "Settings" action you can define further configuration settings.
- *Team*
With the "Team" action you can define app administrators who are allowed to edit the configuration. App members are entitled to use the digital asset management. The respective access rights are defined in the DAM shelves.
Note: Based on the defined users, the consumed licenses are calculated.

9.3 Settings

To define DAM configuration settings, navigate to your DAM dashboard, switch to configuration, and select the "Settings" action in the tool area. You can define the following settings there in the various tabs:

Tab "General Settings"

- *Name*
The name of the configuration.
- *Subject*
Defines an additional description of the configuration.
- *Holiday table*
Defines the holiday table for this context.

- *Restrict Shortcuts Within Teamroom*
Defines which kind of shortcuts may be stored in the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
Allows to restrict team members who can open or download content on the device.
- *All Team Members May Add Members*
Defines whether all team members can add users to the team or only team members with full control.
- *Restrict Team Members*
Defines the organizations, organizational units, teams and external organizations whose members may be added to the configuration.
- *Main Administrator*
Defines the user who will receive the automatically generated e-mail messages concerning the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.
- *Support Team*
The support team handles the organization-internal management of support requests in the respective context.
- *Activate Advanced Mode*
Advanced mode includes, for example, working with multiple shelves, as well as managing templates and presets.
- *Activate Trace Output*
For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

Tab "DAM Configuration"

- *Fields for Digital Assets*
Defines which optional fields are to be displayed for assets.
- *Mandatory Fields for Digital Assets*
Defines digital asset fields that must contain a value.
- *Minimum Number of Terms to Be Assigned*
Defines the minimum number of terms that must be defined for an asset.
- *Registering New Digital Assets*
Defines whether the registration dialog is opened when new assets are stored in an asset shelf.
- *Automatically Generate Terms When Registering Digital Assets*
Defines whether index words are automatically generated as terms if they do not already exist.
Note: *Registering New Digital Assets* has to be enabled.
- *Subordinate Generated Terms to This Term*
The generated terms are subordinated to the specified term.
- *Use Licensing*
Defines whether the fields for licensing are displayed. Assets without a valid license can only be downloaded by app administrators.
- *Fields for Licensing*
Defines which fields are displayed for licensing.

- *Mandatory Fields for Licensing*
Defines licensing fields that must contain a value.
- *License Types (License Text Changeable)*
Defines license types for which the license text can be manually adjusted per asset.
As *Scope Note* of the license type, you can define the license text. This text is taken over as *License Text* when choosing a license type for the asset. In the *Related Terms*, you can define usage types, which will be prefilled when selecting a license for an asset.
- *License Types (License Text Not Changeable)*
Defines license types for which the license text cannot be adjusted manually.
As *Scope Note* of the license type, you can define the license text. This text is taken over as *License Text* when choosing a license type for the asset. In the *Related Terms*, you can define usage types, which will be prefilled when selecting a license for an asset.
- *Usage Types*
The defined usage types can be assigned to assets.
- *Allow Editing of Image Properties (Exif, IPTC, XMP)*
Defines whether image properties of JPG and PNG images can be modified.
- *Editable General Properties*
Defines general image properties that are editable.
- *Editable Exif Properties*
Defines Exif image properties that are editable.

Tab “Logos”

The defined logos and background image are used for DAM configuration and personal dashboards.

Tab “Default Values”

- *Default Thesaurus for New Terms*
If a default thesaurus is specified, new terms can be created directly during indexing.
- *Default Categories*
When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Processes*
When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Background Tasks*
When an object is created, the specified background tasks are assigned.
- *Approval process for templates and presets*
In order to use templates, text modules, forms and categories, processes and presets, they must be released. If a process is to be used for the release, a BPMN process diagram can be assigned here. Release processes must contain the activity "Release for Usage".

Tab “Content Settings”

- *Allow Comments*
Specifies whether PDF annotations can be applied to documents.

Note: If enabled, you can specify additional settings for the allowed and preferred type (public/private) of comments and define whether users with read-only rights can also comment publicly.

- *Allow Public Links*

Defines whether public links may be published.

Note: If enabled, you can make additional settings: you can block content downloading and set default values for access protection (validity period and password protection).

- *Generate Cover Sheet for PDF Overviews of Documents*

Defines whether a cover sheet is generated for PDF overviews of documents.

- *Use Watermarks*

Defines whether documents are automatically converted into protected PDF documents with a definable watermark.

- *Remove PDF document restrictions on upload.*

You can specify whether PDF document restrictions are removed during upload. This does not remove user passwords.

Note: Settings defined in the DAM configuration apply to all asset shelves. To define settings for individual asset shelves, users with "All Rights" can define them in the settings of the asset shelf.

9.4 Registering Assets

You can define whether the registration dialog is opened when new assets are stored in an asset shelf. To enable registration of new assets, proceed as follows:

1. Navigate to the DAM configuration.
2. Select the "Settings" action in the tool area.
3. Navigate to the "DAM Configuration" tab.
4. Set the checkbox in the *Register New Digital Assets* field.
5. Configure the Register dialog by specifying which metadata fields are displayed to users within "Fields for Digital Assets" and specify mandatory fields for successful registration within "Mandatory fields for Digital Assets".

Note: You can further configure the registration process in this context by defining how terms and license information is handled. Given the functionalities are enabled.

9.5 Licensing

You can define whether the fields for licensing are displayed. Assets without a valid license can only be downloaded by administrators. To enable licensing, proceed as follows:

1. Navigate to the DAM configuration.
2. Select the "Settings" action in the tool area.
3. Navigate to the "DAM Configuration" tab.
4. Set the checkbox in the *Use licensing* field.
5. Further configure licensing by selecting the fields within "Fields for Licensing", "Mandatory fields for Licensing", and generating the license and usage types for your users to select.

Note: When licensing is enabled, digital assets without a valid license are marked accordingly and can only be downloaded by administrators.

9.6 Download Formats

You can define the following download formats. When downloading, the content is converted according to the selected download format.

Download Format for Audio

- *Output Format*
Output formats MP3, OGG and “Original Format” are available.

Download Format for Images

- *Adjust Image*
 - *Do Not Adjust*
The image is not changed.
 - *Adjust Aspect Ratio and Size*
Aspect Ratio: The image is cut corresponding to the defined aspect ratio. If a maximum size is additionally defined, this is taken into account.
Maximum Size: Defines the maximum height and width of the image. The image is not distorted but scaled to the desired size.
 - *Adjustable at Download*
Image adjustments can be set by the user when downloading.
- *Output Format*
Output formats JPEG, PDF, PNG, TIFF and “Original Format” are available.

Download Format for Documents (general content)

- *Output Format*
Output formats PDF and “Original Format” are available.

Download Format for Videos

- *Resolution*
Defines the resolution to which the video should be converted. Only if the resolution of the video is higher than the specified one, it will be converted.
- *Output Format*
Output formats MP4, OGV, WEBM and “Original Format” are available.

Note:

- In addition, the download format “Original Format” is available by default (contents are downloaded unchanged).
- You can use the *Permissions* field to specify the users who are offered the download format.
- Sample download formats are provided, which you can customize or delete as required.

9.7 Status

Assets can be marked with (processing) status. Status cannot be set manually by users, but are always linked to the completion of specific tasks of predefined default processes. Only administrators have the ability to create status and specify when they are set automatically.

To do this, you must first create at least one status. Since status cannot be set manually by users, but only automatically by the completion of tasks as part of assigned processes, you must secondly link the generated status to the task of your process.

Create Status

To create a status, proceed as follows:

1. Navigate to the DAM configuration.
2. Go to the "Status" area.
3. Select the "Create Status" action in the tool area.
4. Assign a (multilingual) name, choose a status icon and optionally a background color.
5. Confirm with "Next".

Note: Repeat these steps if you want to create multiple status.

Automated Status-Setting

In order for your created status to be set automatically, you must link it to the completion of a task. To do so, proceed as follows:

1. Navigate to the DAM configuration.
2. Go to the "Status" area.
3. Click "Properties" in the context menu of the status.
4. Copy or make a note of the "Fabasoft Cloud ID" of the status. You will find this in the "General" tab.
Note: The Fabasoft Cloud ID always starts with "COO".
5. Close the properties of the status and navigate to the "Processes" section of your DAM configuration.
6. Select and open an existing process or create a new BPMN process diagram.
7. Select the task whose completion you want to link to the status change by double-clicking on it.
8. Navigate to the "Extended" tab of the task.

Store the following expression in the field *Expression When Completing the Activity*, including the "Fabasoft Cloud ID" noted in step 4 or from your clipboard:

```
coobj.ObjectLock();  
coobj.FSCFOLIO@1.1001:bostate = COO....
```

9. Confirm with "Apply" and "Next".
10. Release the process for usage by selecting the "Release for Usage" or "Re-release" action in the processes tool area.

Note: More detailed information on process modeling using the BPMN 2.0 standard can be found in the Fabasoft Cloud User Help in the chapter "[Modeling Business Processes with BPMN 2.0](#)".

9.8 Thesauri

In the Thesauri area, terms are managed that can be used for indexing. Thesauri are hierarchically nested term-trees. You can create them manually or import existing thesauri. To do so, proceed as follows:

1. Navigate to the DAM configuration.
2. Go to the "Thesauri" section.
3. Select the "New" action in the tool area.
4. Chose a (multilingual) name for your thesaurus and confirm with "Next".

5. Select the action "Create top concept" in the tool area of your created thesaurus to create a top-level concept. Repeat the step until you have generated all your top-level terms.
6. Navigate to a term on the top level in order to create further terms in it via the action "Create sub-term" analogous to step 5. Repeat the previous steps until you have created the desired term structure.

Note:

- You can create multiple hierarchy levels by creating more sub-terms at the lowest level.
- You can move (sub-) terms in your term structure using drag-and-drop or copy-and-paste.
- Duplicate terms can be merged using the context menu command "Tools" > "Merge Term". The term to be replaced will also be replaced in all usage locations.
- In addition or instead of creating your terms manually, you can also import an existing term structure. To do so, select the "Import from File" action in the generated thesaurus top-concept and select a file in RDF/XML format from your local file system.
- To enable your users to create new terms directly during indexing, you have to assign a default thesaurus for new terms in the corresponding area (e.g. settings of the DAM configuration or properties of an asset shelf) in the tab "Default Values".

9.9 Tags

In addition to terms, which are managed in the thesauri area, the tagging function is available for indexing. Unlike terms, tags are managed entirely by administrators in the solution's configuration. Users can only use existing tags to index/tag assets and cannot create their own.

To create tags and thus provide tagging functionality to your users, follow these steps:

1. Navigate to the DAM configuration.
2. Go to the "Tags" section.
3. Select the "Create Tag" action in the tool area.
4. Choose a (multilingual) name for your tag. Additionally, you have the option to add a remark and to specify for which object classes the created tag can be used.
5. Confirm with "Next".

Note:

- Repeat steps 3 - 5 if you want to create multiple tags directly.
- You have the possibility to nest your tags hierarchically and thus create keyword trees. To do this, navigate in an existing tag and select the action "Create tag" again, or move existing tags with "drag-and-drop" or "copy-and-paste".

9.10 Configuration of Adobe Stock

The prerequisite for establishing the connection to Adobe Stock is a valid "Adobe Stock API Application". Details on how to set up such an application can be found here:

<https://adobeio-prod.adobe.com/apis/creativecloud/stock/docs.html#!adobe/stock-api-docs/master/docs/getting-started/02-register-app.md>

When creating such an application from your Adobe console, a public key for a signature certificate is required. Your Adobe console will provide you with the credentials required for connection setup (*API Key (Client ID), Client Secret, Technical Account ID, Organization ID* and a *JWT Signature Certificate*).

DAM Configuration

To store the Adobe stock data in the DAM configuration, proceed as follows:

1. Navigate in the DAM configuration.
2. Click the "External Content Sources" widget.
3. Click on the "Connect Adobe Stock" action.
4. Enter the credentials of the "Adobe Stock API Application" and upload the JWT signature certificate.
5. Click "Connect". A connection test will be performed automatically.