

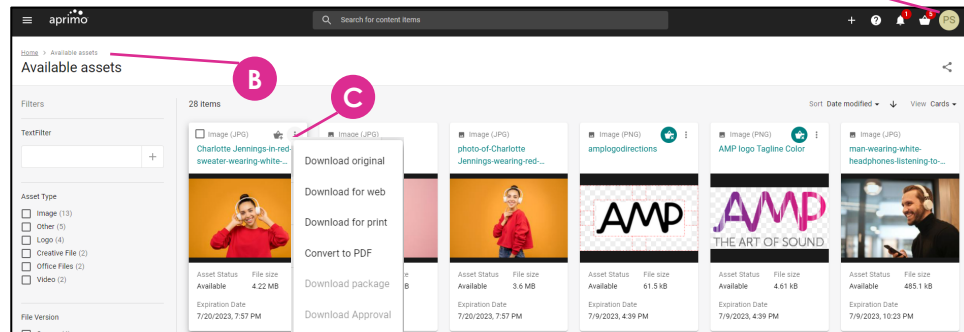
Asset Action Menus – Interacting with Assets

DAM will offer ways of interacting with assets via menu options. Menus and menu options are fully configurable. Different menu options might be configured for Cards and Details view and different Content Types.

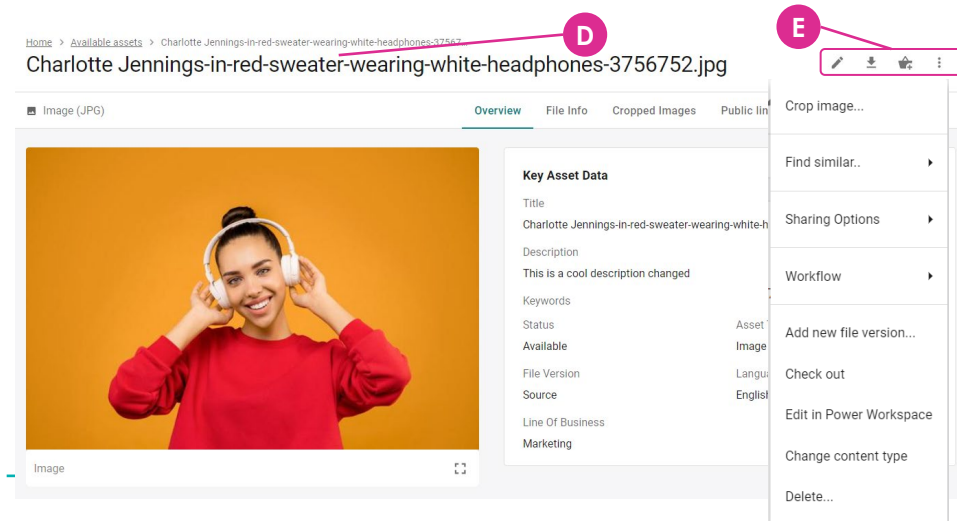


Step 1 Accessing Menus

- A. Logon to Aprimo
- B. On the home page, click on one of the available Spaces or use the Search Bar to access the Search results screen
- C. Once in Cards view, click on the More icon to access the Card menu options for that asset



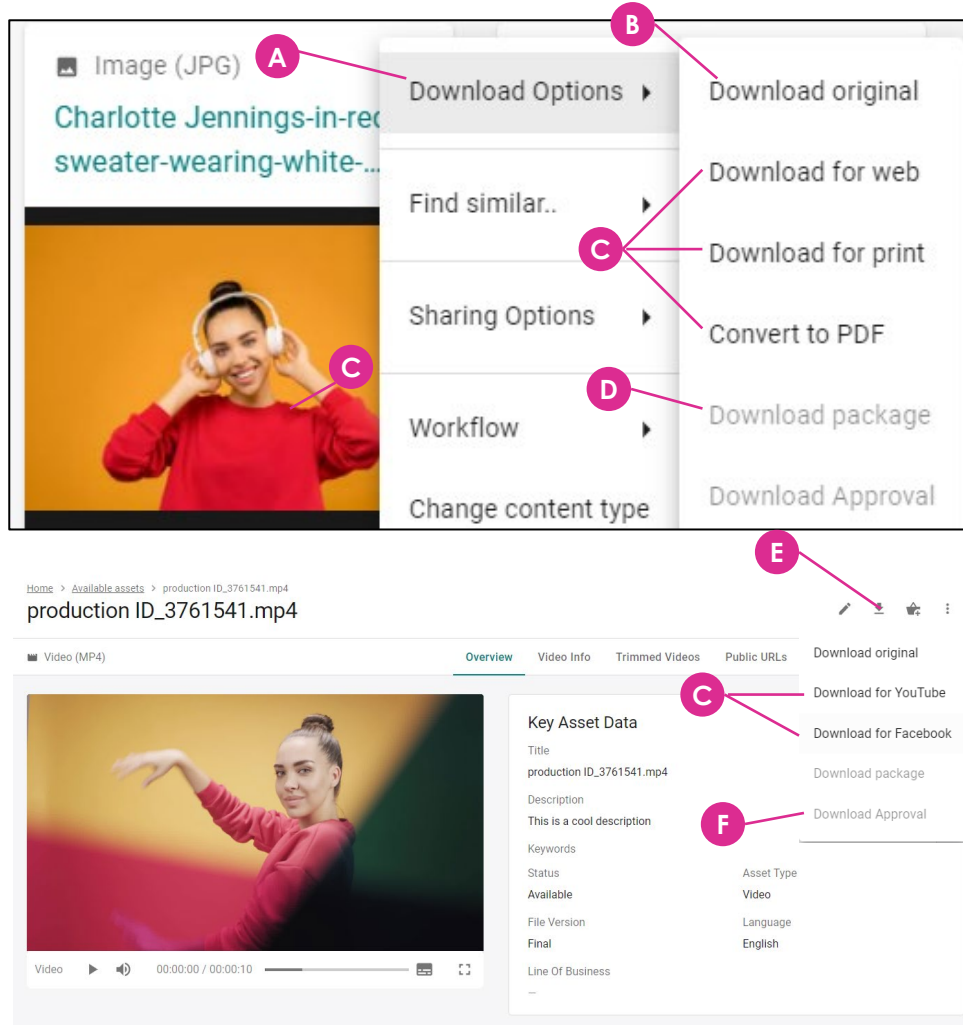
- D. Alternatively, click on the asset to go into Details view.
- E. When in Details View, find menu options in the top right corner of the asset page. Note that some options might be available directly (edit via pencil button) while other options might require you to click on the button to open dropdown menu.



Asset Action Menus – Interacting with Assets

Step 2 Download Options

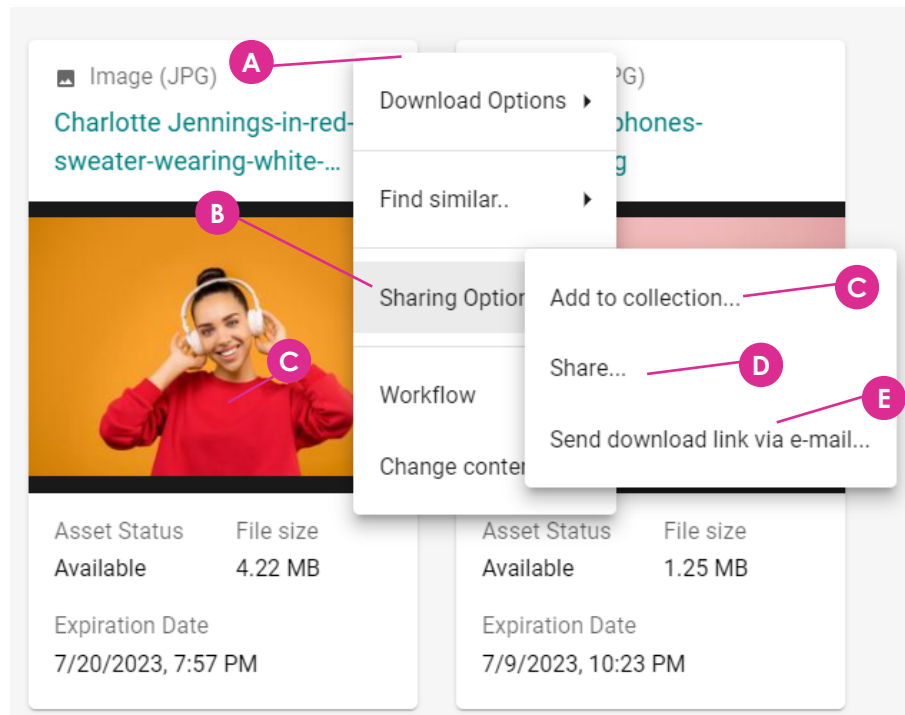
- A. From asset Card, click on the “Download Options” menu group to expand download options available in the environment. Download options will vary based on type of the asset.
- B. Download original is default download option for assets that provides a user with latest version of master file from the record
- C. Additional rendition downloads could also be configured – DAM will be able to transform the file and deliver a rendition upon request
- D. For packaged assets Download package action will be applicable – note that not all options in the menu are enabled for any asset
- E. From Asset Details view, click on the down arrow to get the grouping on Download options for the asset.
- F. DAM provides Download Approval process for assets user does not have permission to directly download. In that case, other download option will be disabled, but user will still be able to initiate Download Approval process (reviews will review the request and potentially grant permission for one time download).



Asset Action Menus – Interacting with Assets

Step 3 Collaboration and Sharing Options

- A. From asset Card or Details view, click three dot menu to expand menu options
- B. Click on the Sharing Options section to see all sharing option
- C. “Add to collection” option allows you to add an asset to existing (or new) collection
- D. “Share...” option provides a link to the asset you're currently looking at. The link can be sent to other DAM users for quick reference (note that only users who have access to DAM and have access to that particular asset would be able to use the link)
- E. “Send download link via e-mail” allows you to send an email to external user with download link for the latest version of the master file on the asset
- F. Once you click the option to send download link you will get a popup where you need to provide email address(es) of external users you would like to send the email to in “Recipients(s)” field. Then provide subject and message for email.
- G. Finish the action for sending an email by clicking on “SEND” button. DAM will prepare an email with data you provided, will prepare the download link and place it in the email. (Note that download links sent this way are expiring after 7 days)



Send download link via e-mail

Send someone an e-mail message with a direct link to this file.

Recipient(s)

Subject – optional

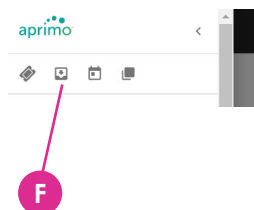
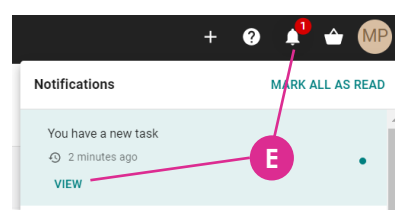
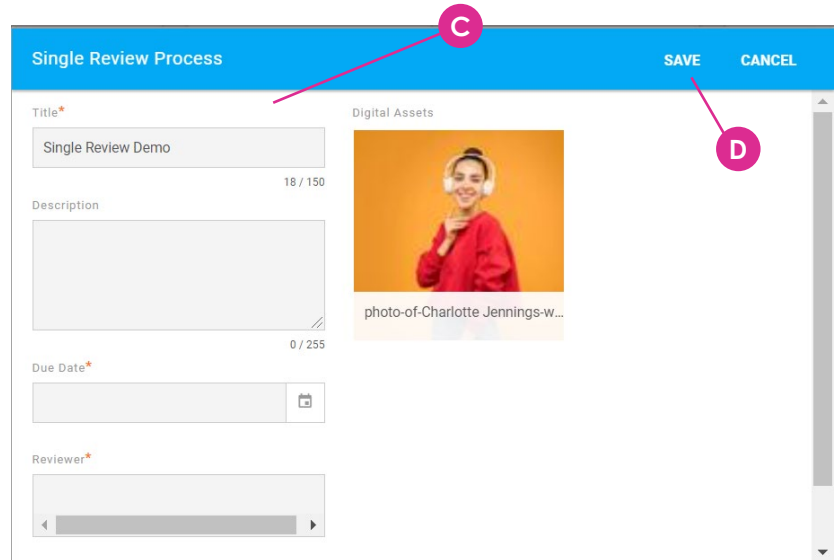
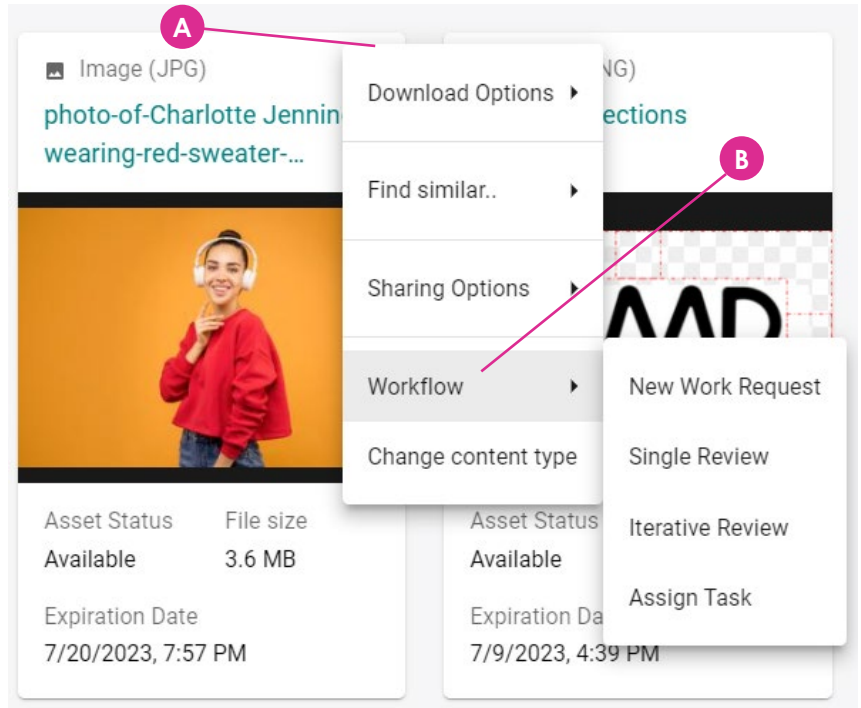
Message – optional

CANCEL SEND

Asset Action Menus – Interacting with Assets

Step 4 Out of the Box DAM Workflow Options

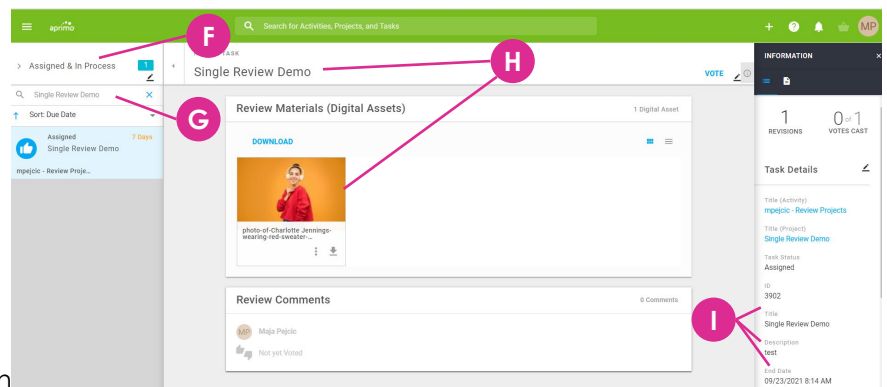
- A. From asset Card or Details view, click three dot menu to expand menu options
- B. Click on the Workflow section to expand Workflow related menu options. Single Review, Iterative Review and Assign Task options are supported by pre-configured simplistic workflows. New Work Request option is applicable only if you have Productivity Management license and custom Work Requests configured.
 - Single Review workflow: assigns one review task to defined Reviewer, the initiator of the workflow gets follow up task with Reviewers vote and comments
 - Iterative Review workflow: similar to Single Review except the reviews are done in iterative manner – as long as vote is not positive, additional task will get assigned to workflow initiator to update asset per Reviewers comments.
 - Assign Task workflow: will assign singular task to defined Assignee. The initiator will provide information about what is expected from Task Assignee in Title and Description when starting workflow.
- C. When clicking either Single Review, Iterative Review or Assign Task, you will see a popup window where you will need to provide request Title, Description, Due Date and Assigned User/Reviewers for the task. The asset you used the workflow option on will also show on the popup window indicating that asset will become a part of the workflow.
- D. When you fill in all necessary details, you can initiate the workflow by clicking on "SAVE".
- E. DAM will notify you via notifications icon in the top right corner if a new workflow task has been assigned to you. You can click on "VIEW" button to be taken directly to the task.
- F. Alternatively, you can reach you Task Inbox via main menu shortcut and see all your assigned tasks at once.



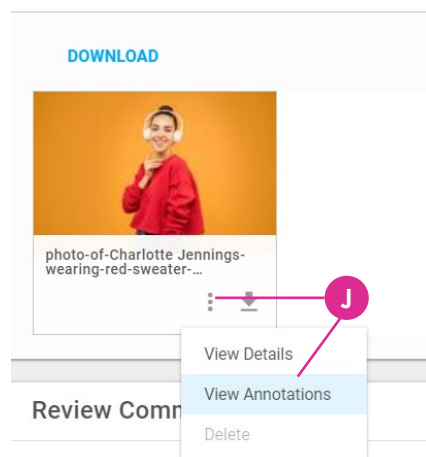
Asset Action Menus – Interacting with Assets

Step 4 Out of the Box DAM Workflow Options (continued)

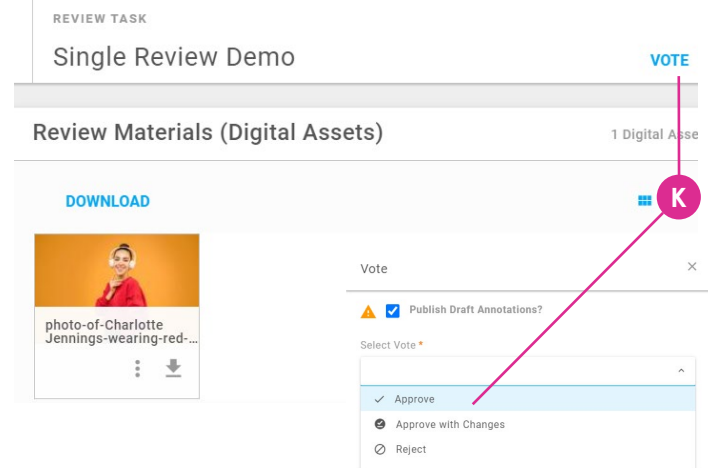
- F. Task Inbox will show you by default Assigned and In Process Tasks
- G. You can use filtering to find a task by project name
- H. Main area of the task contains Task Title and it will show you panel with asset for which workflow was initiated.
- I. Information Panel will show you Title, Description and Due Date defined by the user who initiated the workflow. For “Assign Task” workflow refer to Description to understand what the initiator of the workflow wanted you to achieve during task execution.
- J. For Single Review and Iterative Review you should use Annotation Viewer tool to review and annotate asset within Aprimo. You can access Annotation Viewer by using three dot menu on the asset and clicking “View Annotations” option



Review Materials (Digital Assets)

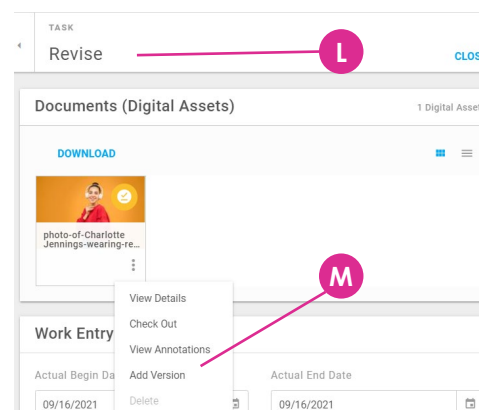


- K. Once you're ready to finish the review tasks, click on the “VOTE” button in the top right corner of the task. Select a voting option, leave a comment. In case of “Assign Task” workflow, you will see “CLOSE” button instead of “VOTE” button, that will allow you to close the task once you are done.



- L. If you're the initiator of an Iterative Review, and Reviewer's vote was not “Approve”, you will be assigned “Revise” task to correct the asset.

- M. You should use “Add Version” option out of three dot menu over asset to upload new version of the asset. After this is done you can close the task, and another review task will be assigned to Reviewer.

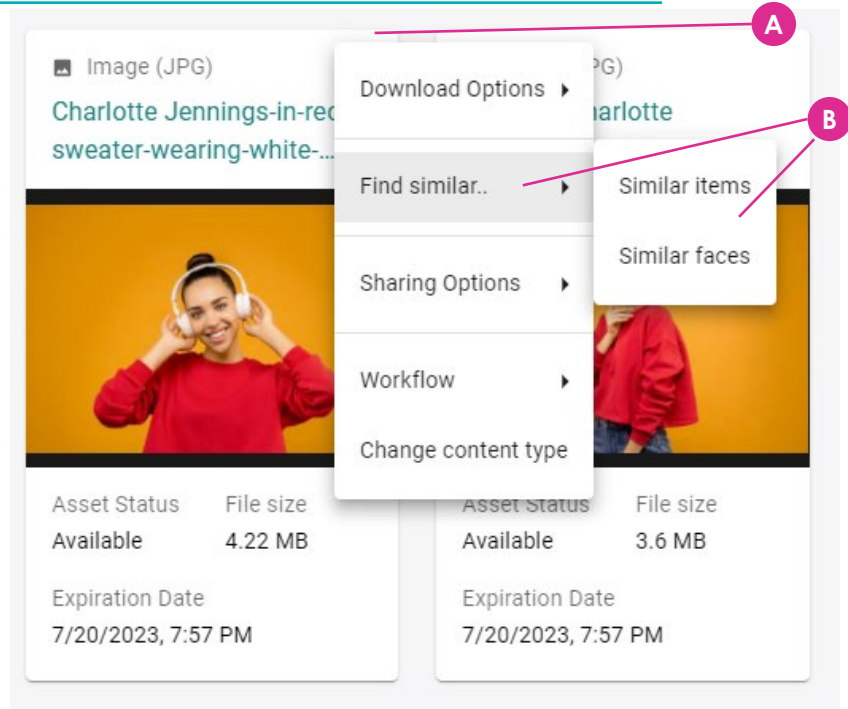


Asset Action Menus – Interacting with Assets

Step 5 Finding Similar Assets Options

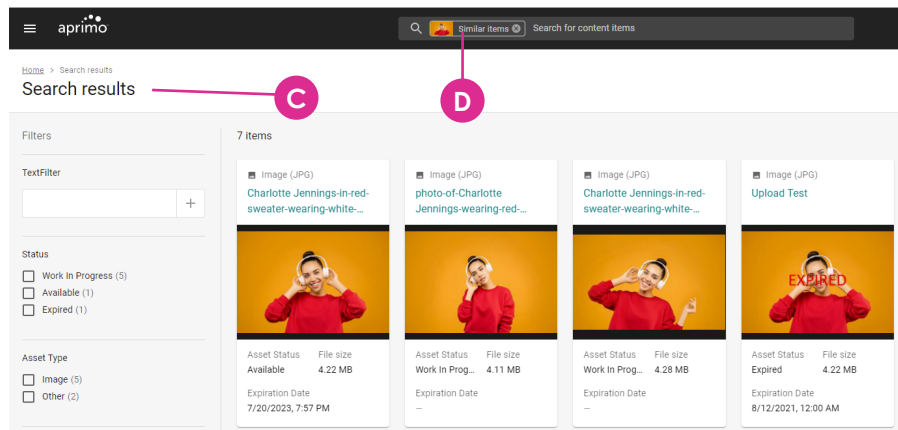
DAM can help you identify visually similar assets or assets with similar faces.

- A. From asset Card or Details view, click three dot menu to expand menu options
- B. Then, click on “Find similar...” section to expose option to find assets that are visually similar or have similar faces



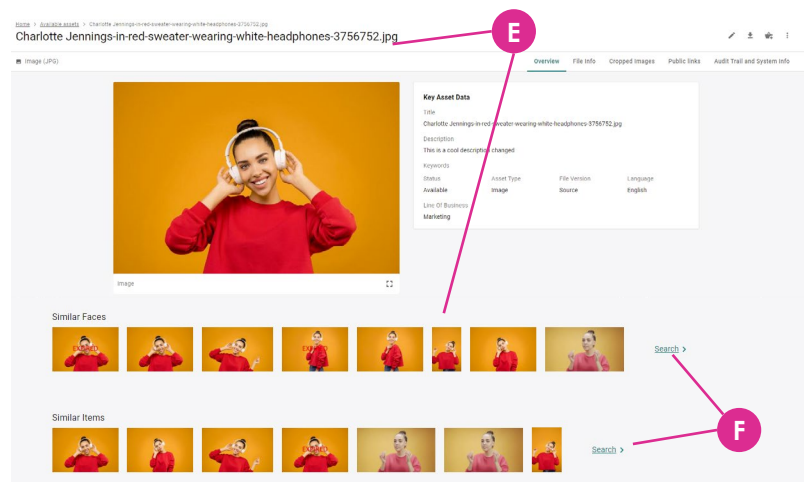
- C. When you choose one of those options, you will be brought to Search results page where similar assets will be listed

- D. Notice your search criteria in the Search Bar which now shows that search is based on finding items similar to assets you initiated the action from



- E. If you're on the assets details page and want to find assets that are similar, you can also scroll to the bottom of the page to find section where similar items or assets with similar faces are exposed

- F. Use “Search” links to open Search results page with all similar assets showing



Asset Action Menus – Interacting with Assets

Step 6 Editing Options

Asset in DAM can be edited in multiple ways, either changing metadata or file/file version

- A. Navigate to an asset via space or via Search results page and open the asset's details page
- B. Click on Pencil button to open asset in Edit mode
- C. Once in edit mode, start editing metadata
- D. You can exit edit mode without saving changes by clicking "x"
- E. When you are satisfied with metadata changes, click "SAVE CHANGES"
- F. Expand more menu options, and find options to "Add new file version..." that would allow you to upload a new version to master file on the asset
- G. Use "Check out" option to check out the file from the asset (which locks the current version so that other users cannot edit while asset is checked out) and edit. Note: this option uses Desktop connector.
- H. Asset can also be edited in Power Workspace (another UI available in DAM typically used by Librarians) by using "Edit in Power Workspace" option
- I. If you need to change Content Type of an asset, use option "Change content type"
- J. Finally, if you have appropriate permissions, you will have a "Delete" option to completely remove asset from DAM.

