



# QUICK START GUIDE



For more information, please visit our online documentation  
<https://docs.phraseanet.com>

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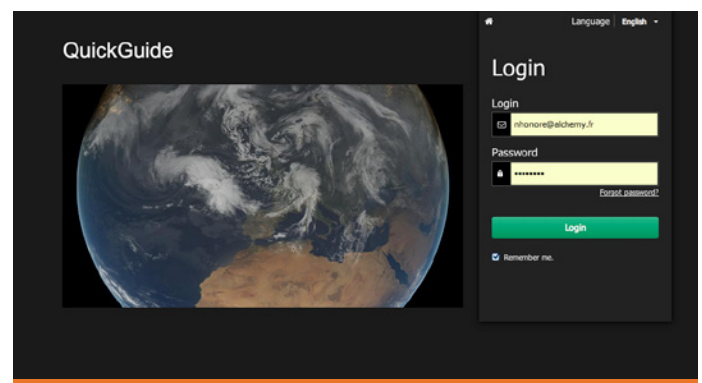
## 1 - LOG IN

Open a new page in your web browser and enter the Phraseanet website address.

-The Phraseanet homepage opens.

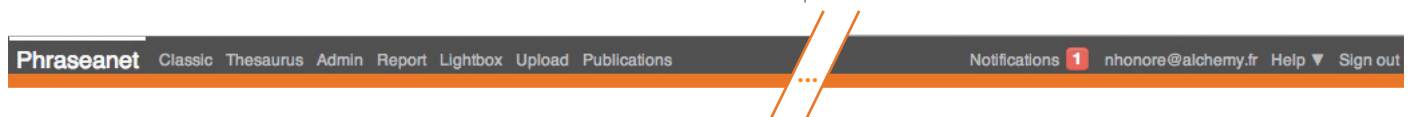
-Select your language, enter your login and password.

Click on the **Login** button.



## 2 - PHRASEANET MENU

The Phraseanet interfaces are accessible from the top Menu (permanently displayed). On the right side, you will also find the Notifications, the User Account information and Help buttons.



Phraseanet displays the Production interface by default (or the last used interface).

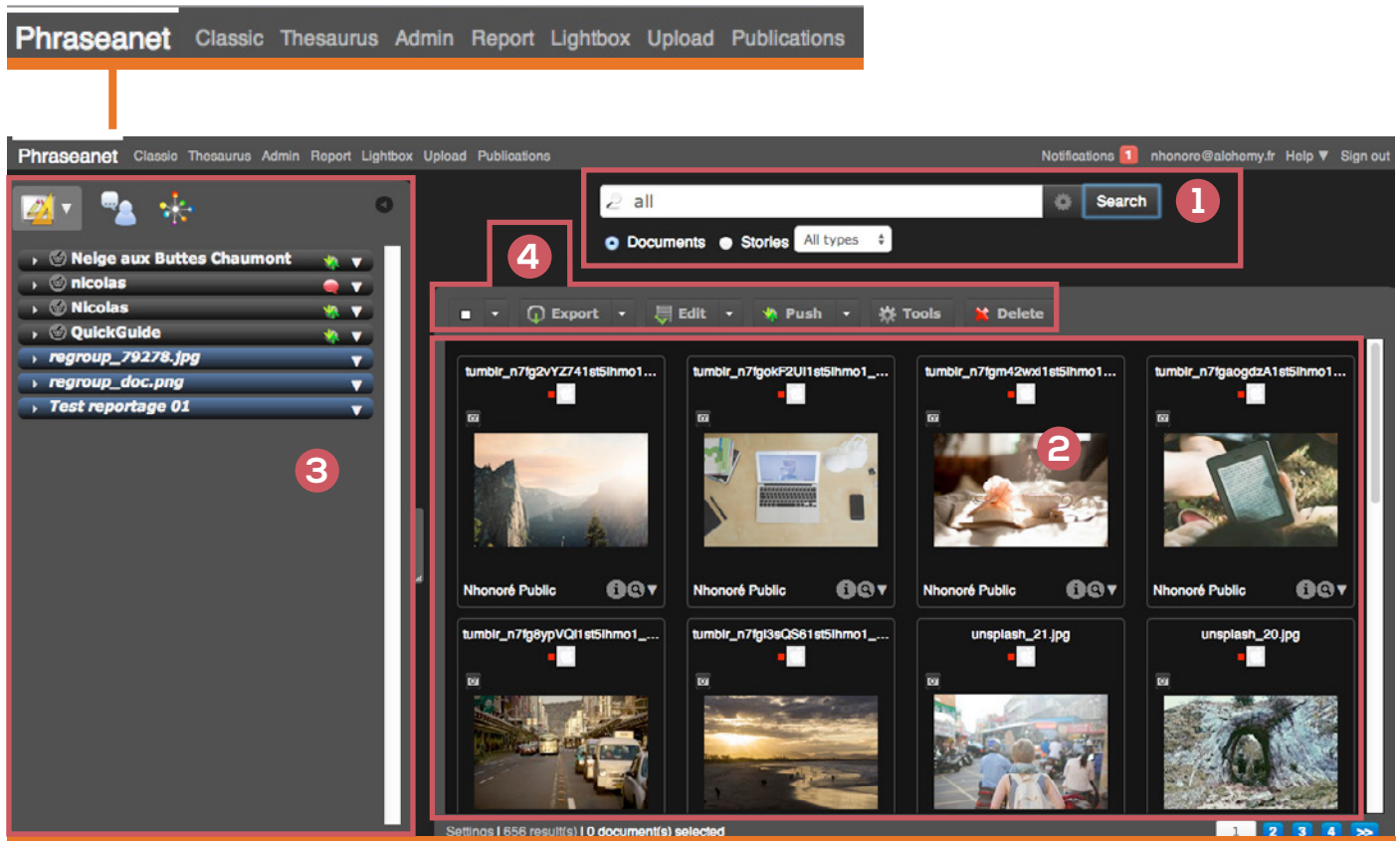
*Note : Phraseanet interfaces and functions are displayed according to users' rights. If he doesn't have the right, the user won't see the function. Please also note that the Lightbox interface will appear in the menu only if baskets or feedbacks have already been sent or received.*

 : Click on the arrow to open a local popup menu with available functions (example : add a document to the basket, export, share...)

 : Resizes the workspaces

# 3 - PROD INTERFACE

## SEARCH, DISPLAY, EDIT



### 1 SEARCH

Enter a keyword to find documents  
( standard or advanced search )

### 2 RESULTS

Displays documents from a search

### 3 WORKZONE

Three tabs. The first one is the Baskets and Stories. The two others are the Proposals and the Thesaurus.

### 4 ACTION BAR

To perform actions on documents : Export, Edit, Push, Tools, Delete,...



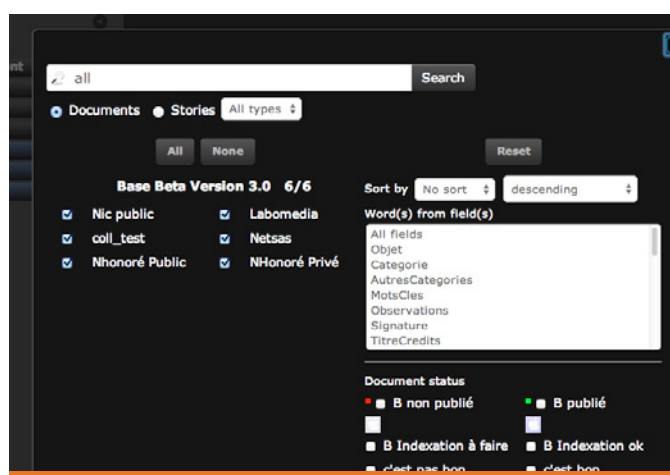
# 1 – SEARCH

## Full Text & Thesaurus Search Engine – Search History – Search on Documents or Stories

Phraseanet supports its own operators : « All » (displays all content), « Last » (with value precision, example : « last 100 » will display your last 100 documents), then click on Search.

Phraseanet supports boolean operators : «and», «or», «without»...

Or type any keyword and click on Search.



## Advanced Search : Filter on collections – Refine the search : Filter on date, field, status...

Click on the wheel icon to display the Advanced Search (Refine your search : select the collections, apply filters : date, status...).

# 2 – RESULTS

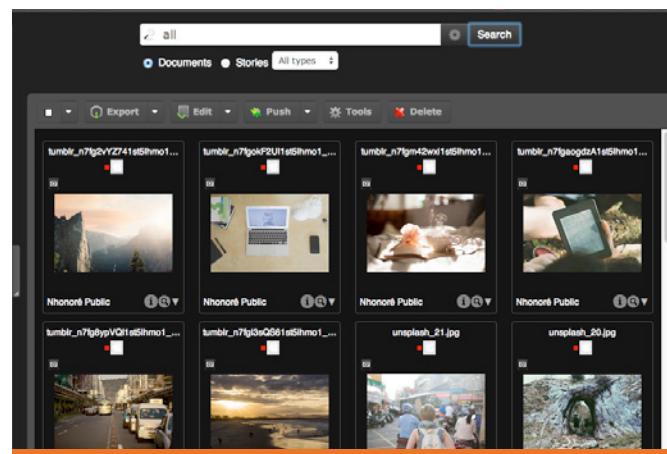
## This zone displays your documents

Documents can be displayed as thumbnails or list (Display mode to choose in Settings).

Select documents from mosaic or list view with a simple click on thumbnails, make multiple selection « shift+click » (continuous) or « alt+click » (discontinue).

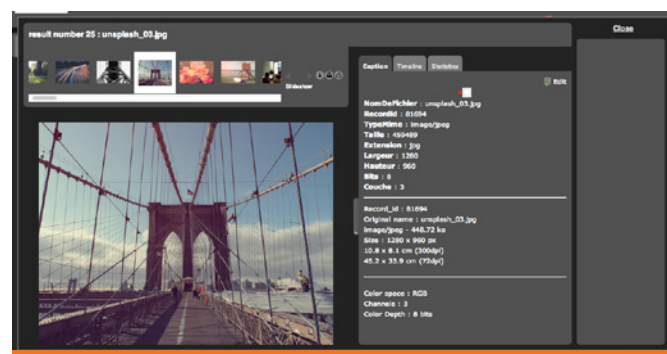
Click on **Settings** to change the size of thumbnails, the number of results per page or the selection color...

Experience keyboard shortcuts (most of them are standard, such as « Ctrl+a » to select all documents from a page).



*Tips : To select documents from several pages : Select documents from one page, then move to next page, press « Alt+click » on the documents to select. (the number of selected files increases). Roll over thumbnails and icons to read caption, view file info and subviews.*

To display the « Detailed View » (including the caption,



the timeline and the document popularity) and view to which basket/story this document belongs, double click on the thumbnail.

# 3 – WORKZONE

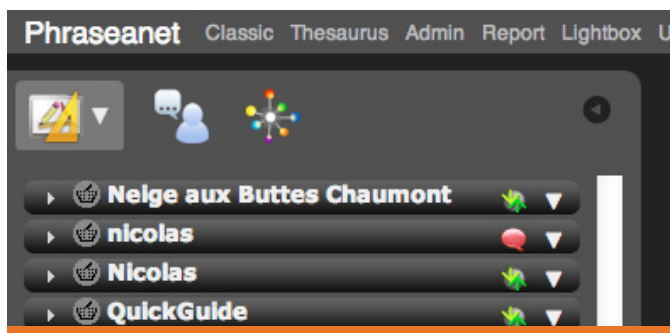
Three tabs : Baskets and Stories, the Proposals, the Thesaurus.

*NB : This workzone is retractable (icon circled in red).*





## The Baskets and Stories



The Stories tabs are blue; The Baskets are grey (yellow, for new, unopened ones). Click on the title of the basket to open or close.



#### Caption :

-  You have received a Feedback request
-  You have sent a Feedback request
-  A Basket has been received
-  Popup menu to perform actions on stories (such as : export, edit, release from basket zone...) and baskets (export, edit, archive...).

#### How to create a new Basket/Story :

To create a basket : Click on the arrow of the basket tab menu and choose **New**. To create a story, choose **New story**.

#### How to add documents to a basket :

Select one or several documents from the Results zone and add them when creating a basket, or drag and drop the documents in the basket if already created.

#### How to perform an action on a basket :

Select one or several documents from the basket and perform the action using the arrow (see below) : export, edit, open in Ligthbox, archive...


*Note: Stories have their own caption and can be searched (select «Stories » instead of « Documents » in the Search zone), contrary to a basket.*

**Baskets may be archived.** Choose **Archive**. An archived basket disappears from the Workzone. It can be stored to be used later, without obstructing the space for actual baskets. To go to the Basket Archive zone, click on the menu of the Basket tab and choose Browse Baskets.

*NB : A basket may be unstored (click on the star).*

#### The Proposals



The icon changes colors  when new proposals appear (when a search has been made).

#### The Thesaurus



For more information, please refer to the user documentation.

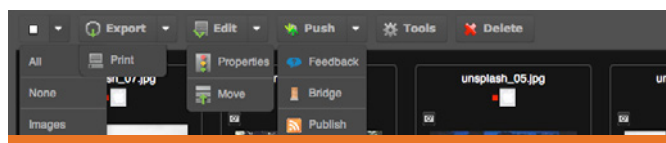
## 4 – ACTION BAR

#### To perform actions on documents

Select documents from the Results zone and click on the icon allowing to perform the action.

Among the available functions : export, print, edit, properties, move, Push, Bridge, publish, tools, delete...

An Overlay window opens. Press « Esc » to cancel and go back to the Results..



**An example : To send documents to one or several user(s), use the « Push » or « Feedback » functions.**



**Push** : to send documents (with or without the right to download)

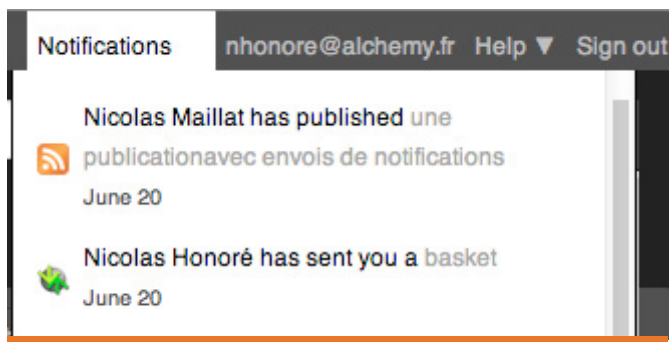


**Feedback** : to send documents and ask for validation (Yes/No). Rights may be given to the users : download documents, comment, and/or see others' choices.

*NB : A List Manager allows to add, save and share user's list*

**Notifications** warn the user in real time about new publications, received baskets, feedbacks...

To edit your user profile, click on the login.



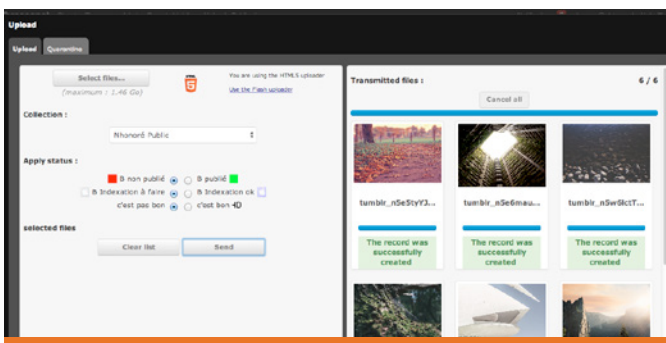
## 4 - UPLOAD

Click on **Upload**. An Overlay window opens. Two tabs are displayed :

- The left tab Add, to import documents
- The right tab the Quarantine, where are pending the non compliant documents.

## 1 - ADD DOCUMENTS

1. Click on **Select files**. Once chosen, thumbnails are being displayed (bottom).



2. Choose a collection
3. Apply a status or more (optional)
4. The user may eventually re-order the documents (use the drag & drop), he also can remove one or more images from the Upload list (Click on the Cancel Button below each thumbnail) or Clear the entire list. If not, click on **Send**.

5. Then, all files are being transferred to the Phraseanet database, all this can be viewed in real time on the right side of the window (« Transmitted files »). A general progression bar, but also a progression bar for each document, allow to follow the status of the transfer.

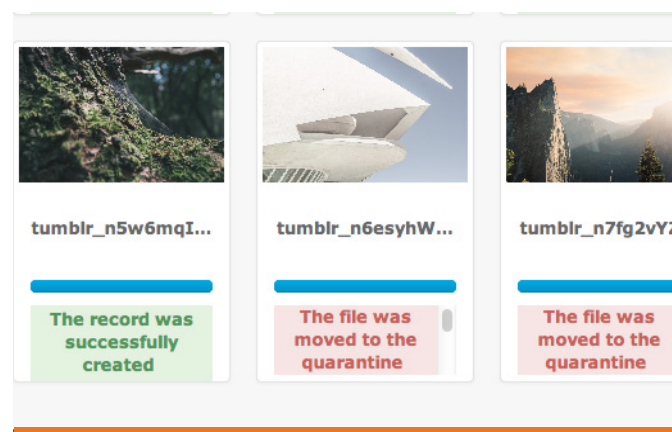
## 2 - THE QUARANTINE

A document entering the database is colored in green, the quarantine in red.

For each file, the user may read the reason why it entered into the quarantine :

- A document can be a duplicate
- Or it may not be compliant with eligibility terms (formats, colorimetry, sizes...).

For each document, the user can : Add, Delete or Substitute the current document (left side) to the document already existing in the database (preview on the right side).



## 5 - A FEW MORE FEATURES

**Export** : Download documents to a workstation or send by email to recipients who will receive a download link.

**Edit** : Index documents, compare existing keywords from multivalued fields, use thesaurus (if active) or suggested values lists.

**Properties** : Change the status on selected documents. Used for workflow matters or access restrictions for documents.

**Move** : Transfer documents from a collection to another.

**Push :** To send documents to a user who can view and/or download the documents, click on Push. To make a Feedback request, click on Feedback. Recipients will receive a link launching the Lightbox interface.

**Bridge :** Publish documents to Dailymotion, YouTube, Flickr...

**Print :** Print selected documents (ex : as PDF).

**Tools :** Read all metadatas from file, rotate documents, rebuild subviews, upload a substitution document.

**Delete :** Delete documents and baskets from database.

For more information, please visit our online documentation :  
<https://docs.phraseanet.com>

## 6 - OTHER MODULES

**Classic :** Compliant with old web browsers, this interface is mainly used to view documents.

**Admin :** Back office and user management  
Thesaurus : Vocabulary control

**Report :** All statistics with detailed reports of activity, per users, databases,...



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