



# Phraseanet

by  LCHEMY



QuickGuide  
V4.0 English

# ABOUT

Phraseanet is an Open Source Digital Asset Management software for all those who need a powerful tool to archive, manage, publish, share their digital files.

The aim of this quickguide is to introduce you to the major features of Phraseanet. This guide doesn't include a complete list of features: All advanced features can be found online on our official documentation.

## 3 WEBSITES TO LEARN MORE ...

[www.alchemy.fr](http://www.alchemy.fr)

- To know more about the vendor and the services around the solution: training, hosting, specific developments...
- Who's using Phraseanet?

[www.phraseanet.com](http://www.phraseanet.com)

- To download the software
- To read use cases

<http://docs.phraseanet.com>

- To view the online documentation: user, developer, administrator...

## Phraseanet 4



### Login

Login

Password

[Forgot password?](#)

Login

☐ Remember me

Or login with



No account yet?

Register

STEP 1

# LOGIN

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

Choose the language in the top right corner of the page.

Enter the login, password and click on "Login".

## STEP 2

# THE MENU BAR

The Phraseanet menu bar allows to access the different interfaces of the application, according to your rights\*.



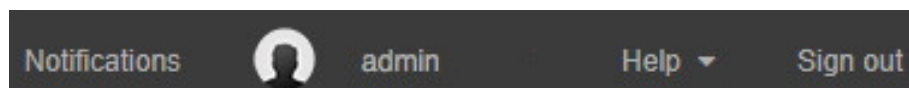
- **Production** : to manage your content
- **Thesaurus** : vocabulary control
- **Administration** : to manage the databases, users, and advanced setup
- **Report** : to view the statistics
- **Lightbox** : to receive documents, request feedback
- **Upload** : to load documents in the database
- Publications

\* Important !

These interfaces are displayed according to the rights of a user.

If a user doesn't see one or several features, this may indicate he doesn't have the necessary rights.

The right part of the menu bar displays your notifications, account name, online help, and logout. The notifications displays the users' events, new available publications, reception of baskets or orders, feedback requests...

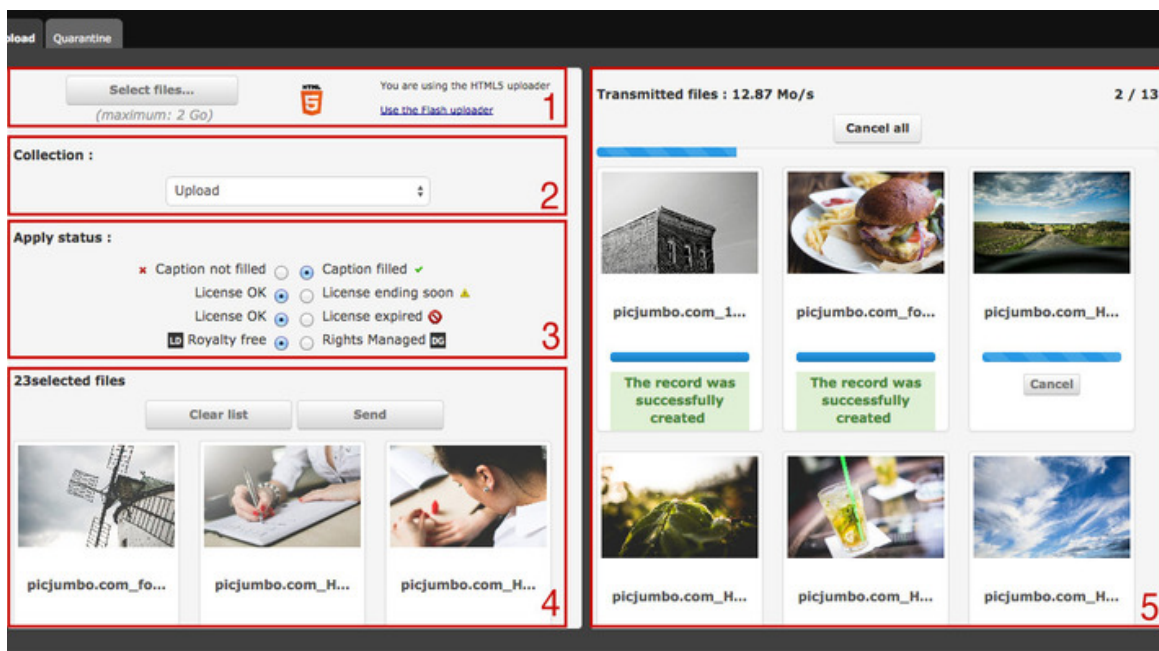


NB: Phraseanet displays the Production interface by default (or the last used interface).

## STEP 3

# ADD DOCUMENTS

Load your media in the database  
with Phraseanet Upload



## 1 / CHOOSE AND SELECT THE DOCUMENTS TO ADD

Click on "Upload" in the menu bar to launch the interface. Click on "Select files" (1). It will launch the computer's file browser.

Choose your files to upload in the database, then click on "Open". The selected files are first being displayed in the left part of the Upload interface (4).

## 2 / CHOOSE THE COLLECTION

Optional: Apply a status if necessary (3) (check the box), and/or reorder your media files before import: to do this, you only have to select a file and to drag and drop it where you need to.

Then, select a collection from the drop-down list (2).

## 3 / SEND

Click on "Send" to transfer the documents to Phraseanet.

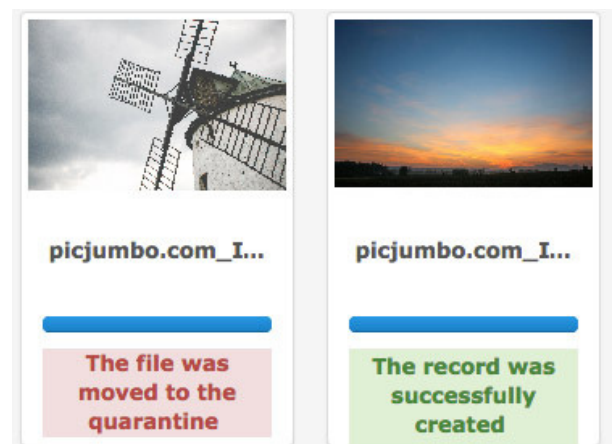
All media files are being transferred to the selected collection. You can see the progress bar on the right part of the window (5).

A green message below every thumbnail states that the document has been entered into the Phraseanet database.

### The Quarantine

When adding documents, some files may automatically be moved to the "Quarantine": A Quarantine tab is displayed for all media with a red message below the thumbnail.

By default, all files whose Universally Unique Identifier (UUID) is already in the database. Other criteria to quarantine files can be set by administrators (for example: file format, color space, dimensions...).





## STEP 4

# PROD: FOR THE MANAGERS

To search, display, edit, publish, share...

A workspace divided into 4 zones:

### 1 / THE SEARCH

Enter a keyword to find documents (simple search) or use filters to refine the search (advanced search).

### 2 / THE RESULTS DISPLAY

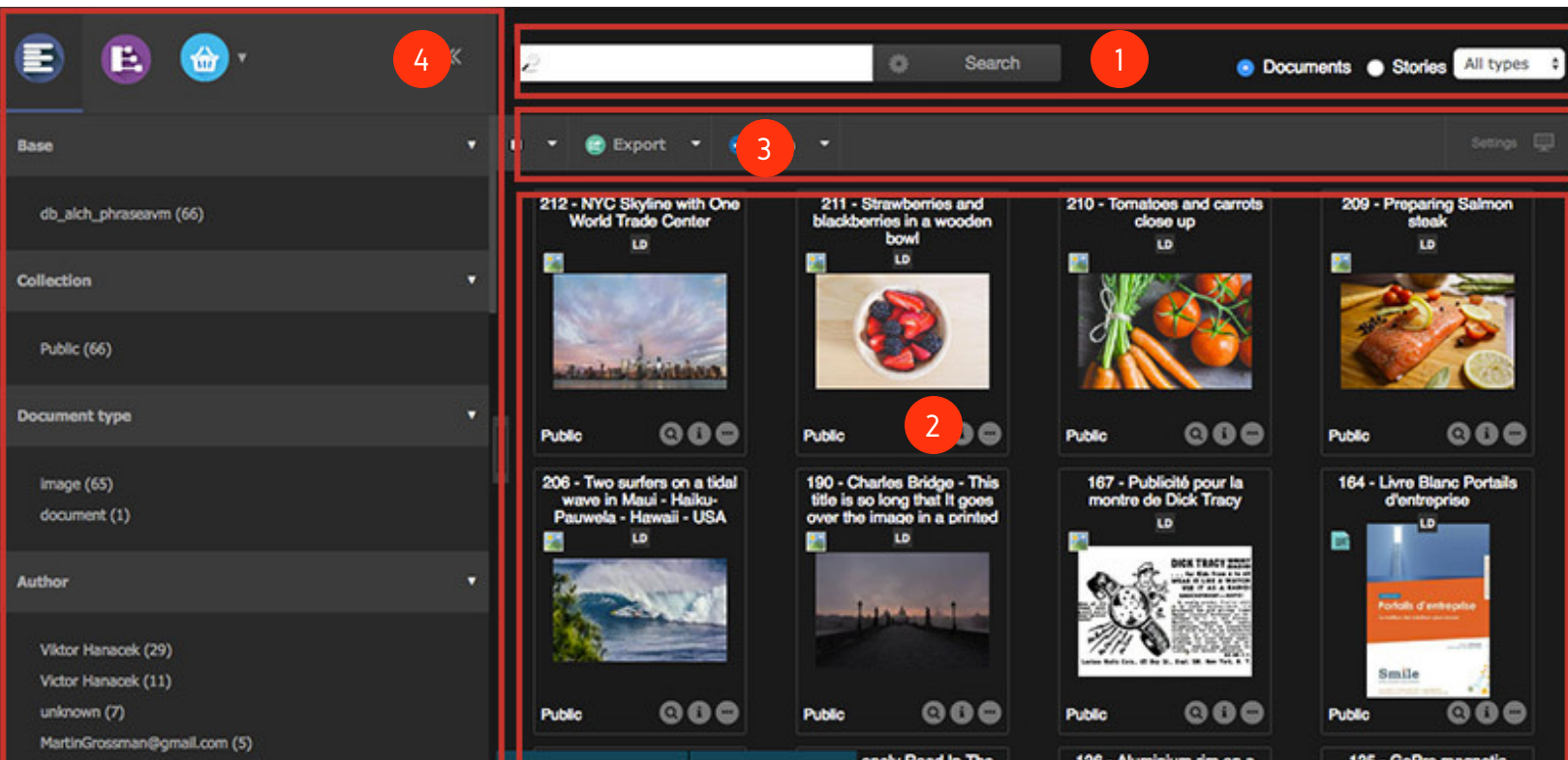
This zone displays the results of a search.

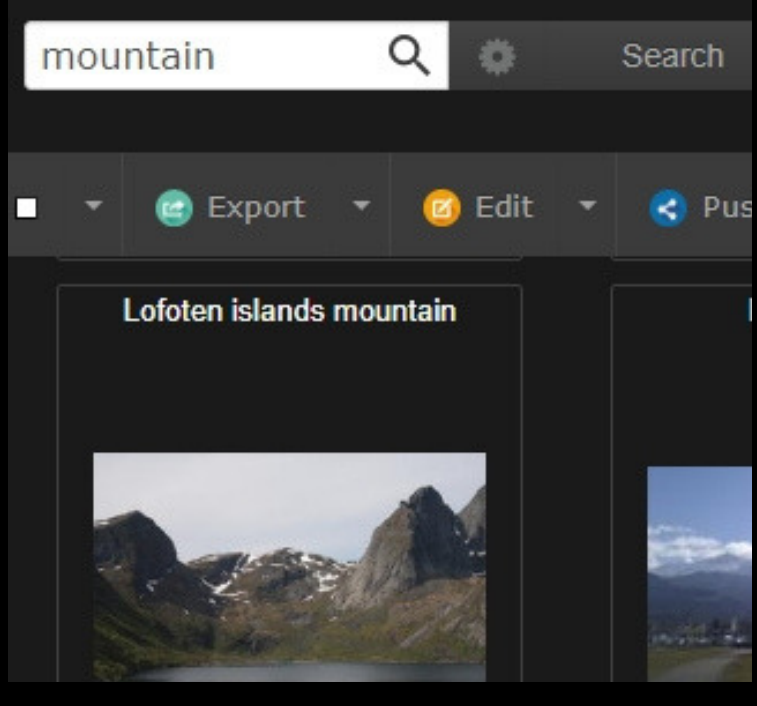
### 3 / THE ACTION BAR

It allows to perform actions on documents.  
For example: edit, export, request feedback...

### 4 / THE WORKZONE

Several tabs: the facets, the thesaurus, the baskets and stories, the webgalleries.





# 1/ THE SEARCH

Phraseanet 4.0 uses the powerful open source search engine Elasticsearch.

## SIMPLE SEARCH

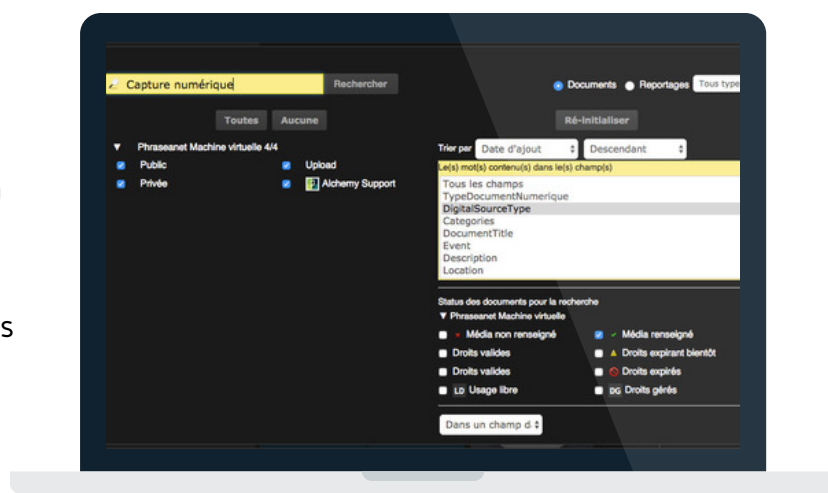
Phraseanet features a full text search mode that allows to retrieve assets depending on the information contained in the documentary fields of their descriptive note.

Enter a keyword, then click on "Search".

## ADVANCED SEARCH

Click on the wheel next to the "Search" button to open the advanced search window.

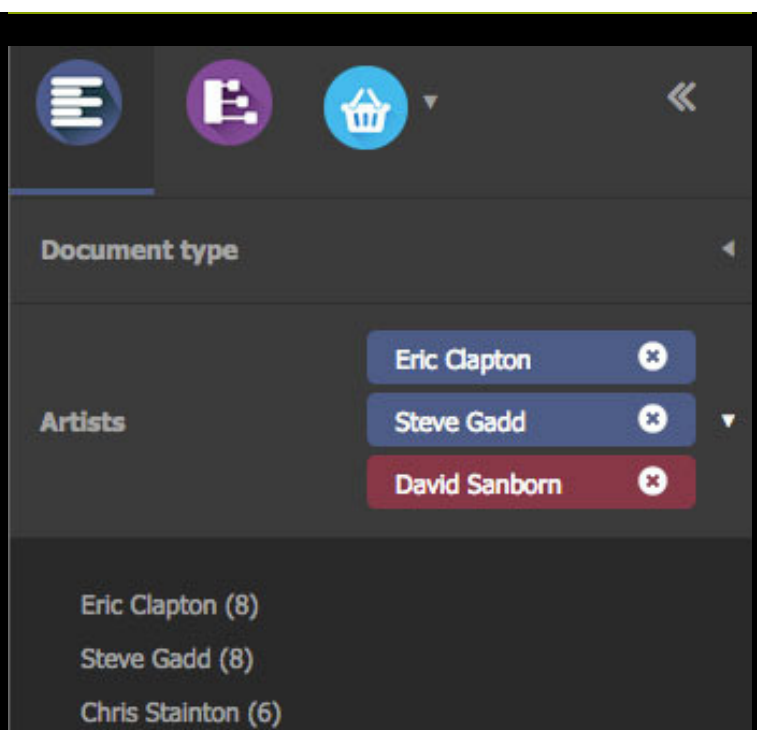
You will be able to choose the databases and collections for the search but also to access several filters.



## BROWSING WITH FACETS

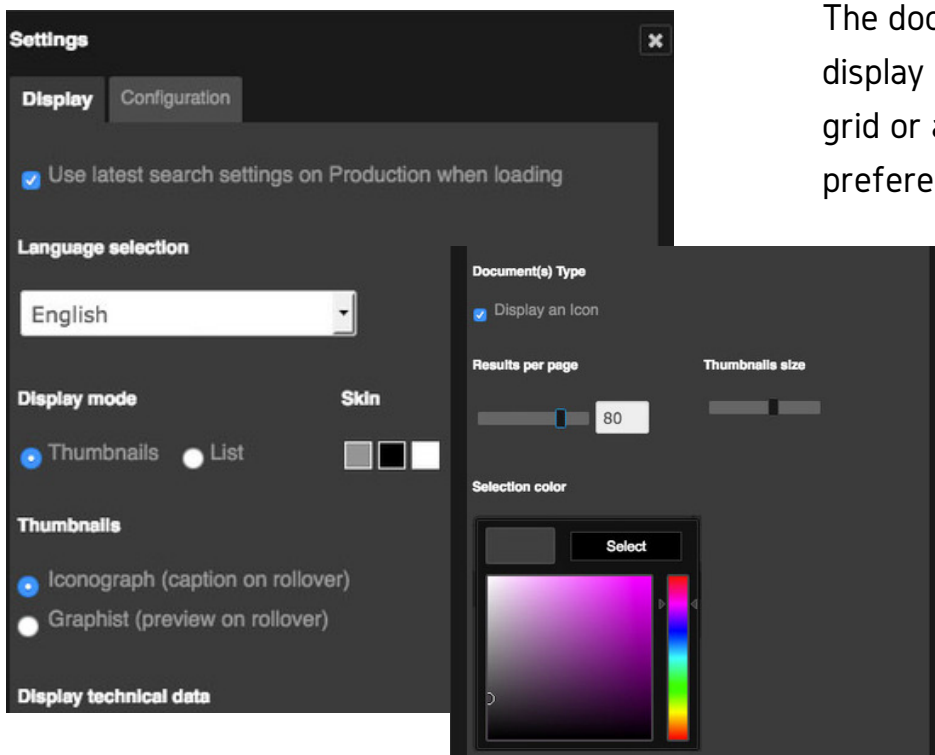
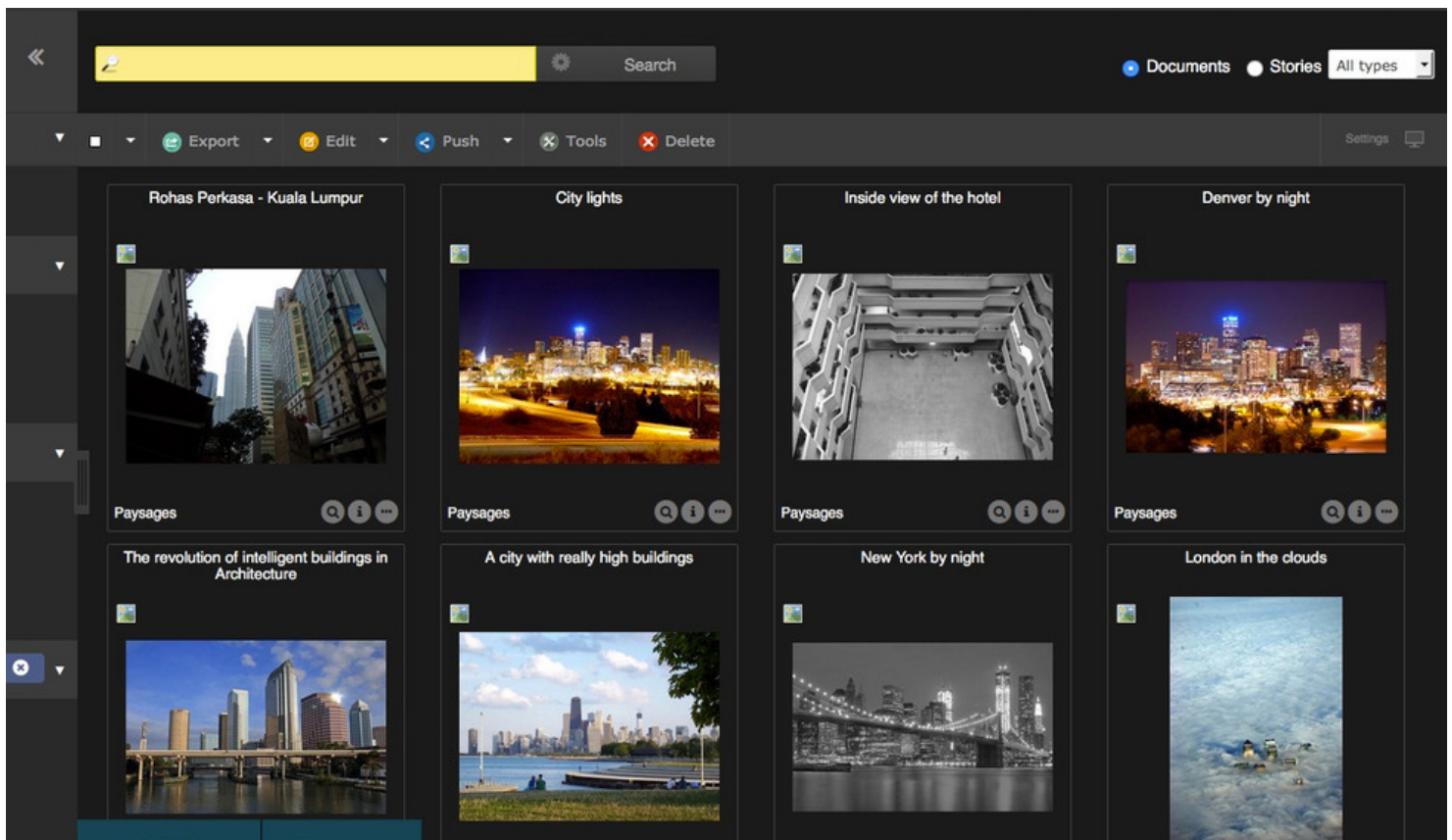
Faceted navigation enables to create a "mapping" of the response. Browse in a very intuitive way by creating several associations of filters. Facets can be used on the databases, collections, documentary fields and technical data.

Please note that it is possible to combine facets. Select several facets (click) or on the opposite, invert (alt click) to exclude these facets from the search.





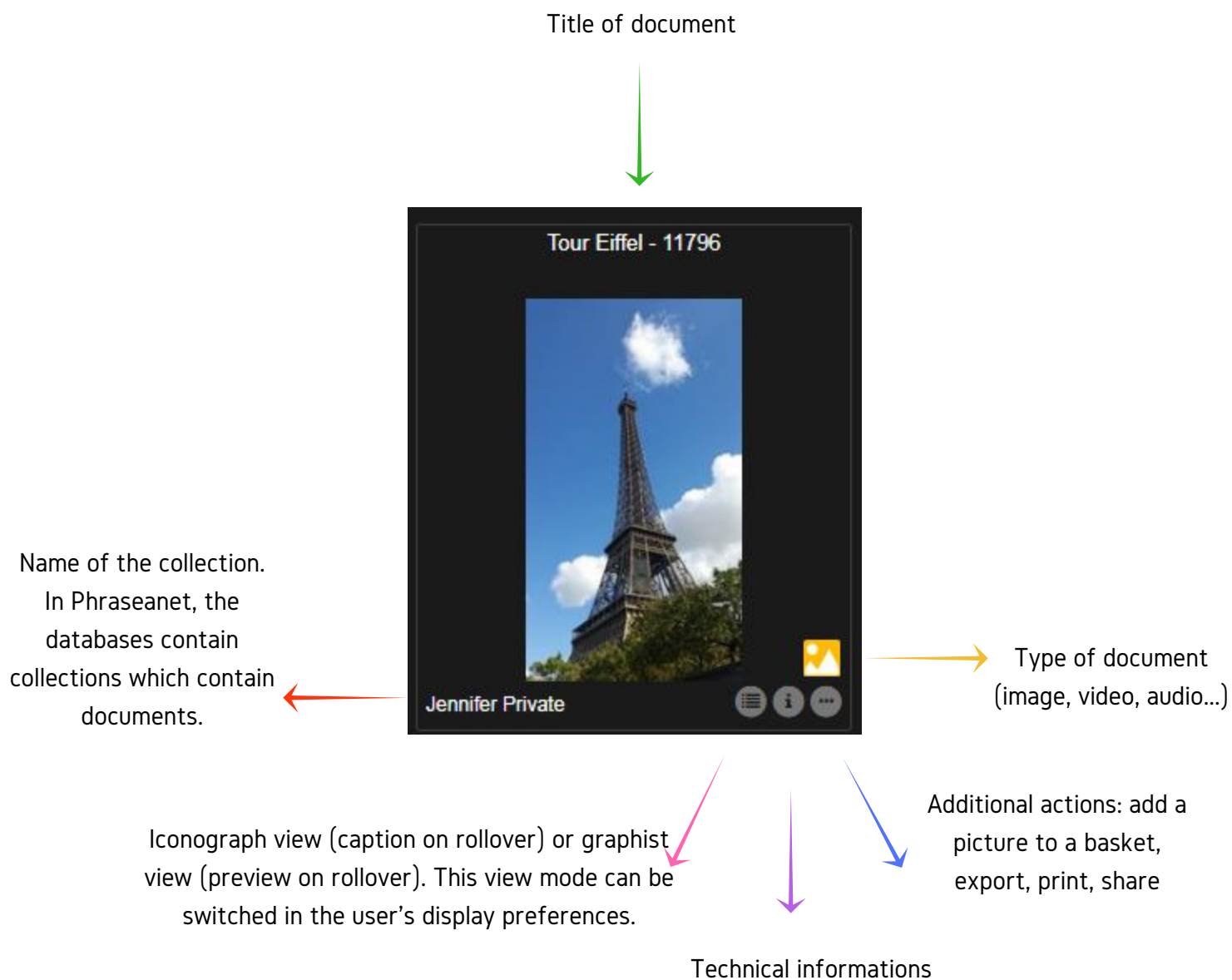
## 2/ DISPLAY THE RESULTS



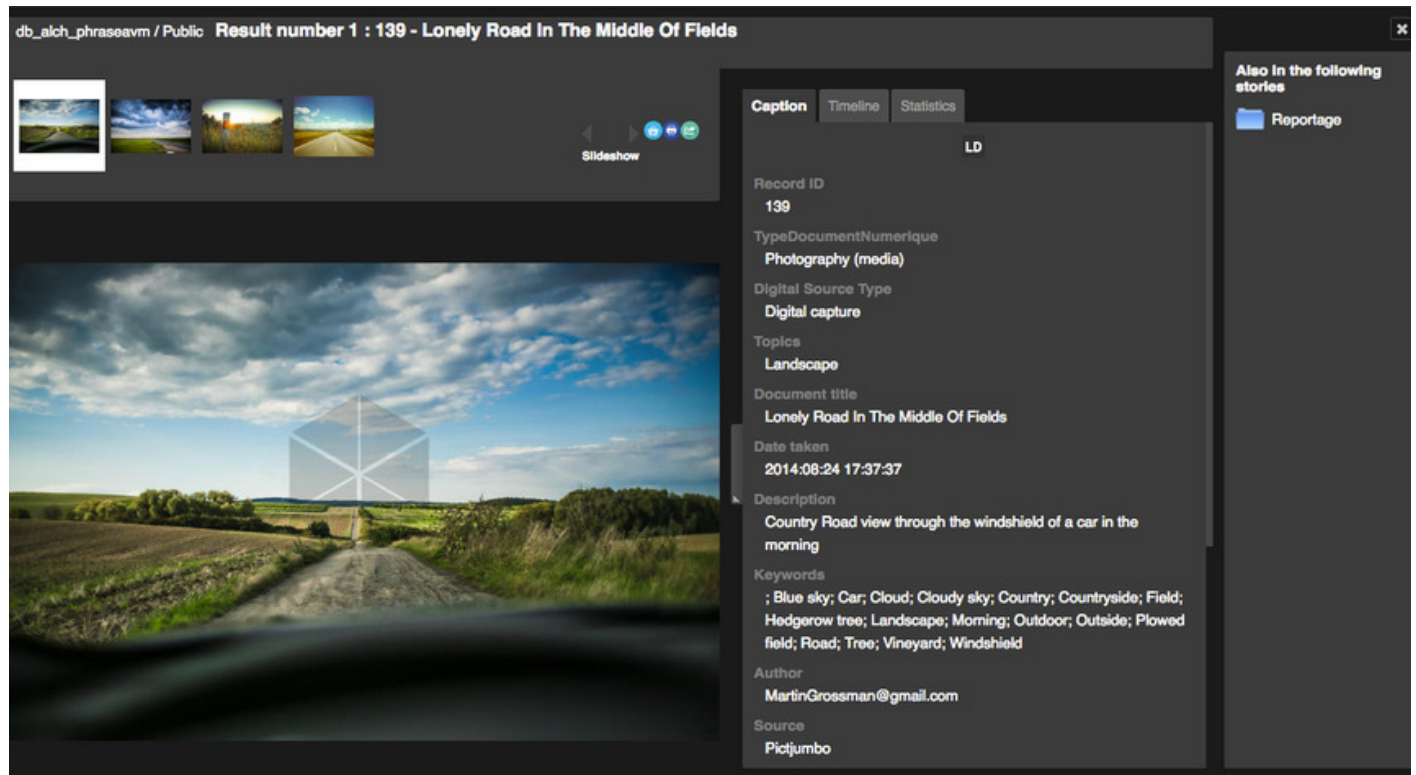
The documents appear in the results display zone. They can be displayed as a grid or a list, depending on the users' preferences.

The "Preferences" button (on the right) for the display settings allow to choose the display mode, the skin, the size of the thumbnails, the number of results per page, the selection color,...

You will find the following informations on each thumbnail :



## THE DETAILED VIEW



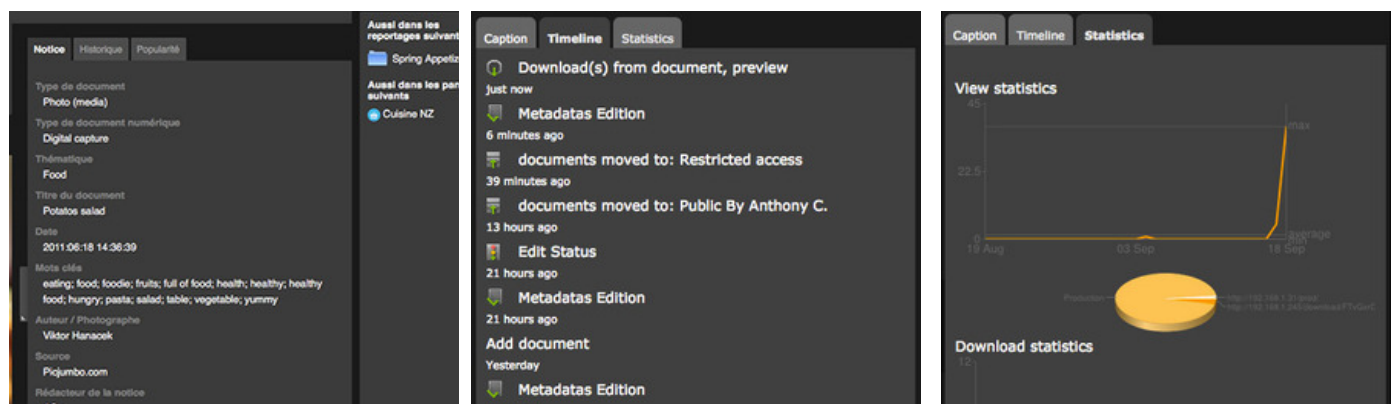
Double click on the thumbnail to display the detailed view.

-The upper part of the window displays the thumbnails feed.

-The preview image of the selected media is at the center.

-On the right side, three tabs display the description, the history and the statistics of the chosen media.

- The CAPTION tab displays information from the filled documentary fields and technical details on the media.
- The TIMELINE tab lists the history of all interactions made by users on the record since it was added to the database.
- The STATISTICS tab displays statistics of the media.



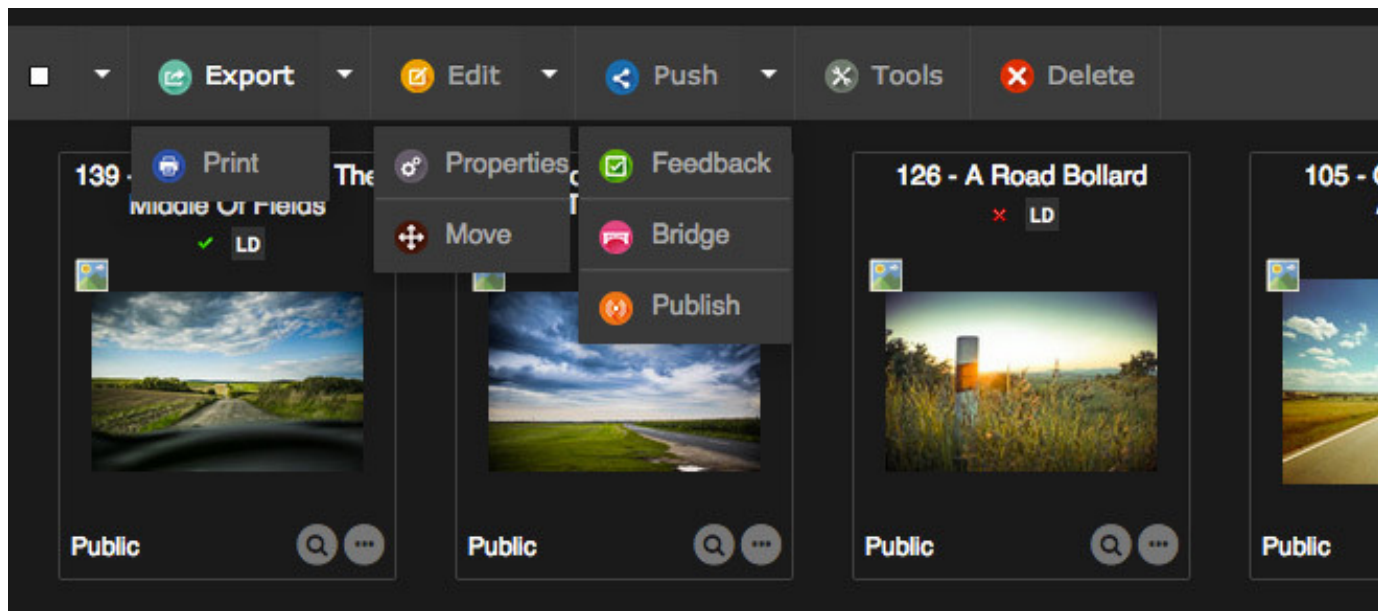
# 3/ THE ACTION BAR

## TO PERFORM ACTIONS ON THE RECORDS

The action bar allows to perform several actions, such as edit, export, send or publish media files...

Located under the search form in the center of the window, it allows to act on the selected documents in the display area.

A similar action bar can also be found in the baskets.



## MAIN FEATURES

- Export, print
- Edit, access to the properties, move to another collection
- Push (send documents), feedback, publication
- Tools (metadata, video tools, rotation, substitution, share permalinks...)
- Delete

# 4/ THE WORKZONE

3 main tabs...



The facets



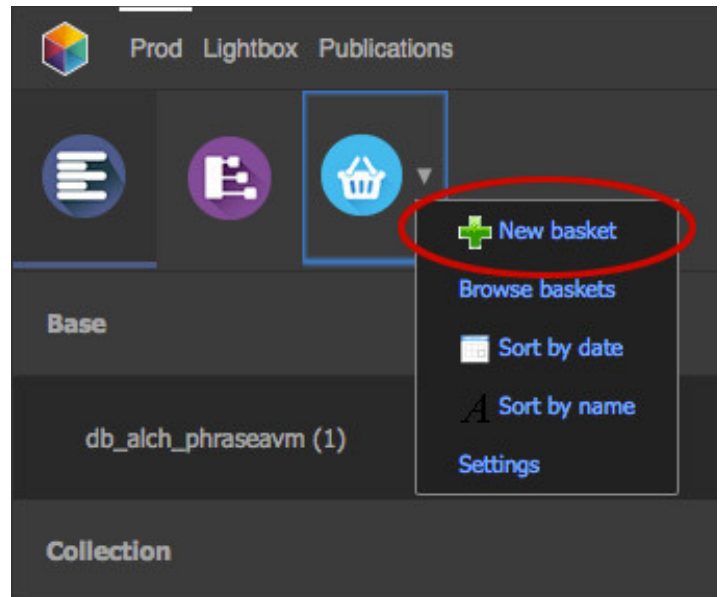
The thesaurus



The baskets and stories

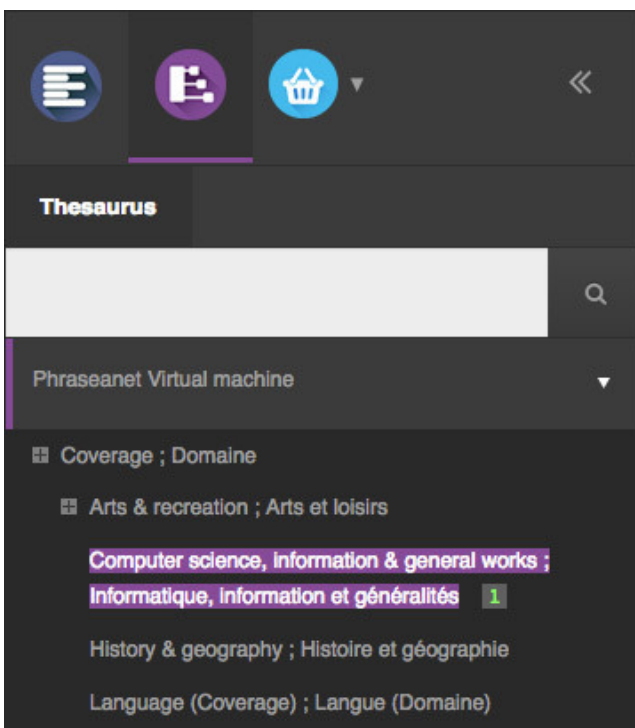


... and optional plugins. For example, the webgalleries.



## THE FACETS

Click on a facet to filter the results and refine your search.



## THE THESAURUS

In Phraseanet, the thesaurus gets its own application. But there is also the Thesaurus in the Phraseanet Production workzone.

The Thesaurus is a documentary language management tool, useful for:

Contributors, to give a reference vocabulary to describe resources of the database in the edition form.

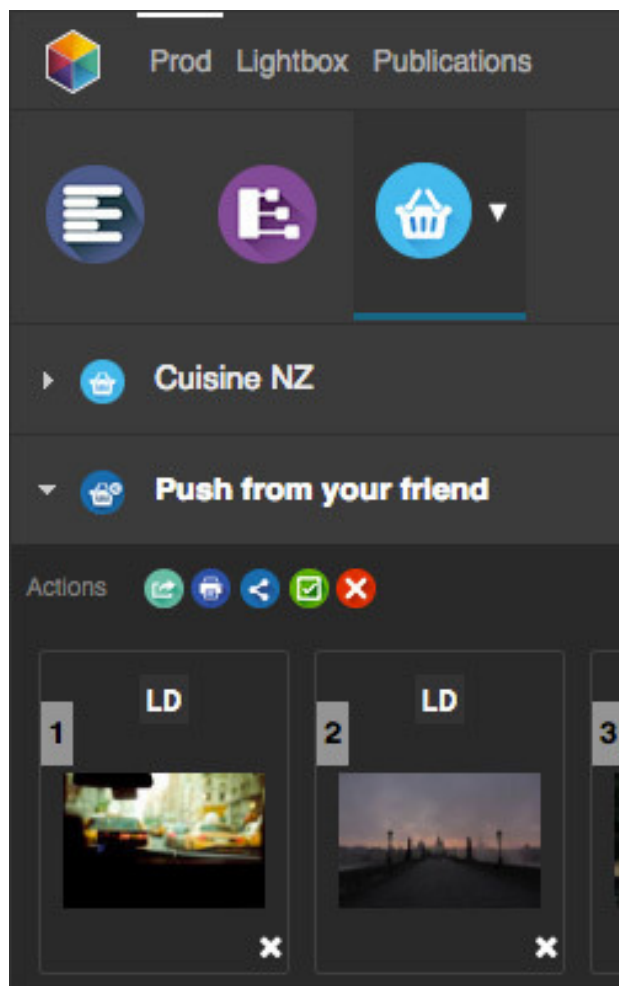
All users, to browse assets allowing to narrow or expand searches.



## THE BASKETS

Baskets and stories allow to set aside media files in order to retrieve and work on them. They are recognizable by their colours: Light blue for baskets, navy blue for stories.

The basket is owned by the user who created it. The basket can be shared through a Push or a Feedback, to other users.



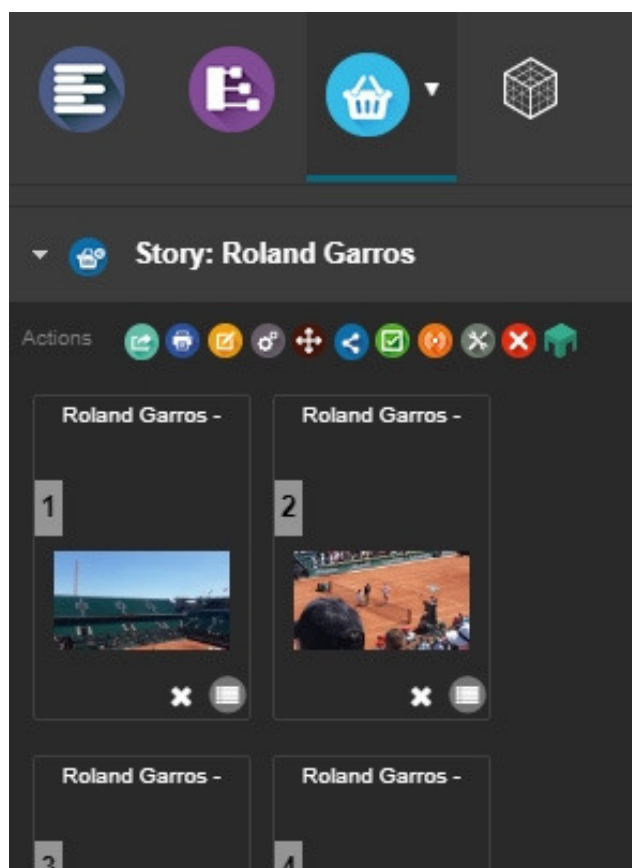
The story is a record in a collection that includes document type records. Unlike baskets, stories can be searched and displayed by every user who can access its collection.

Many actions can be performed from a basket or a story.

Click on its title to open/close it and display the basket's content.

To add pictures to a basket, just drag and drop the pictures or select files and add to the current selection when creating the basket.

## THE STORIES





## STEP 5

# THE OTHER FEATURES

Other interfaces are included in Phraseanet.

Let's take a quick tour!

## ADMINISTRATION: MANAGEMENT AND SETUP OF THE SOLUTION

- To setup the databases and collections, subdefinitions
- To view the logged in users in real time on the system
- To manage the publications
- To manage the register requests, the users rights, to setup the users templates, to create the guest access.

Utilisateur	Modules	Adresse	Date de connexion
Louise Lafont	Production	192.168.1.181	29 March
Louise Lafont	Admin	192.168.1.181	29 March
Louise Lafont	Production	192.168.1.181	29 March
Louise Lafont	Admin	192.168.1.181	29 March
Louise Lafont	Lightbox	192.168.1.181	29 March

Utilisateurs Connectés	
Production	2
Admin	0
Report	0
Thesaurus	0
Lightbox	1

## THESAURUS

- The Thesaurus is dedicated to the thesaurus administration.
- The left side of the window displays the list of candidates, terms and expressions resulting from the indexation and the list of rejected or deleted terms displayed by documentaries fields of the database structure. The right side displays the existing Thesaurus, as a browsable tree.

## REPORT: THE STATISTICS INTERFACE

- Number of connections
- Number of added documents
- Number of downloads
- List of most active users
- Referers



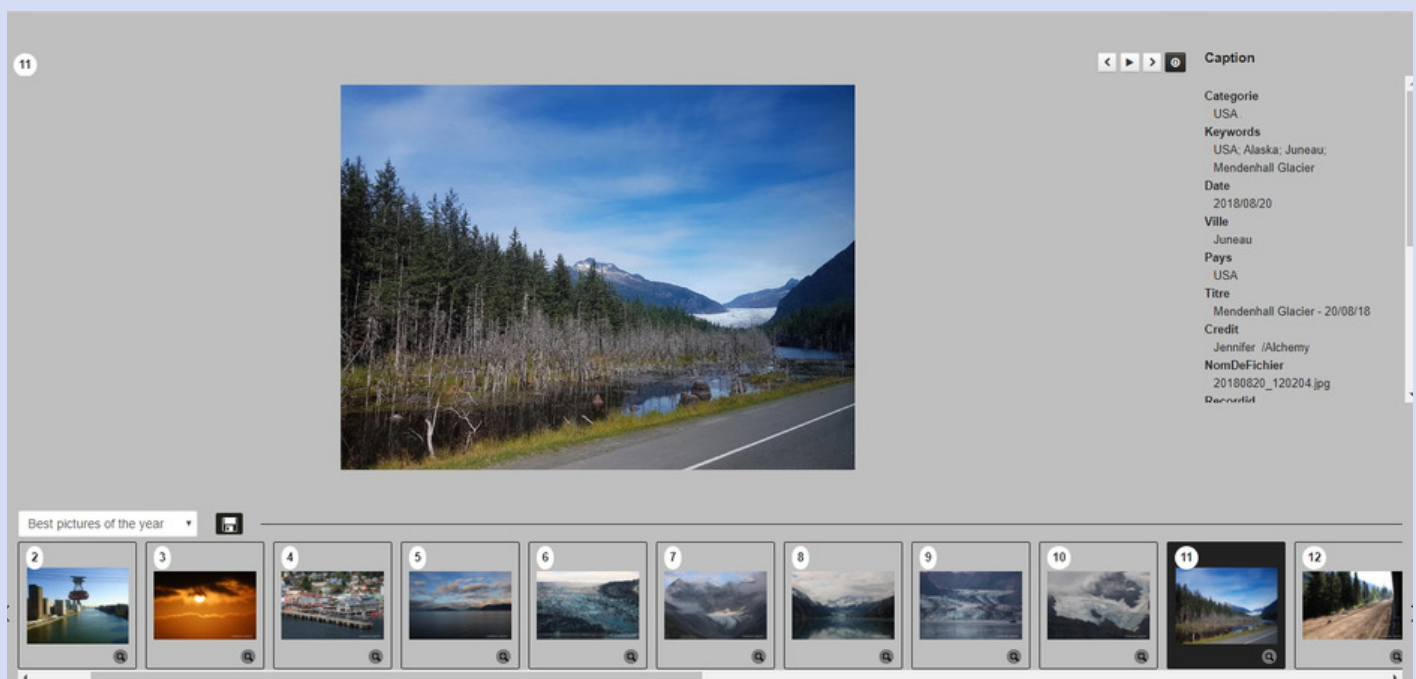
*Focus on the features...*

# PUSH & FEEDBACK

Push and Feedback are two actions intended to transmit documents to users, whether or not they have a Phraseanet account.

The Push is the feature used to send documents to users; the Feedback is intended to receive users opinions on documents. Push and Feedback can be found in the workzone (Production window) but also in a dedicated interface: Lightbox.

## THE PUSH



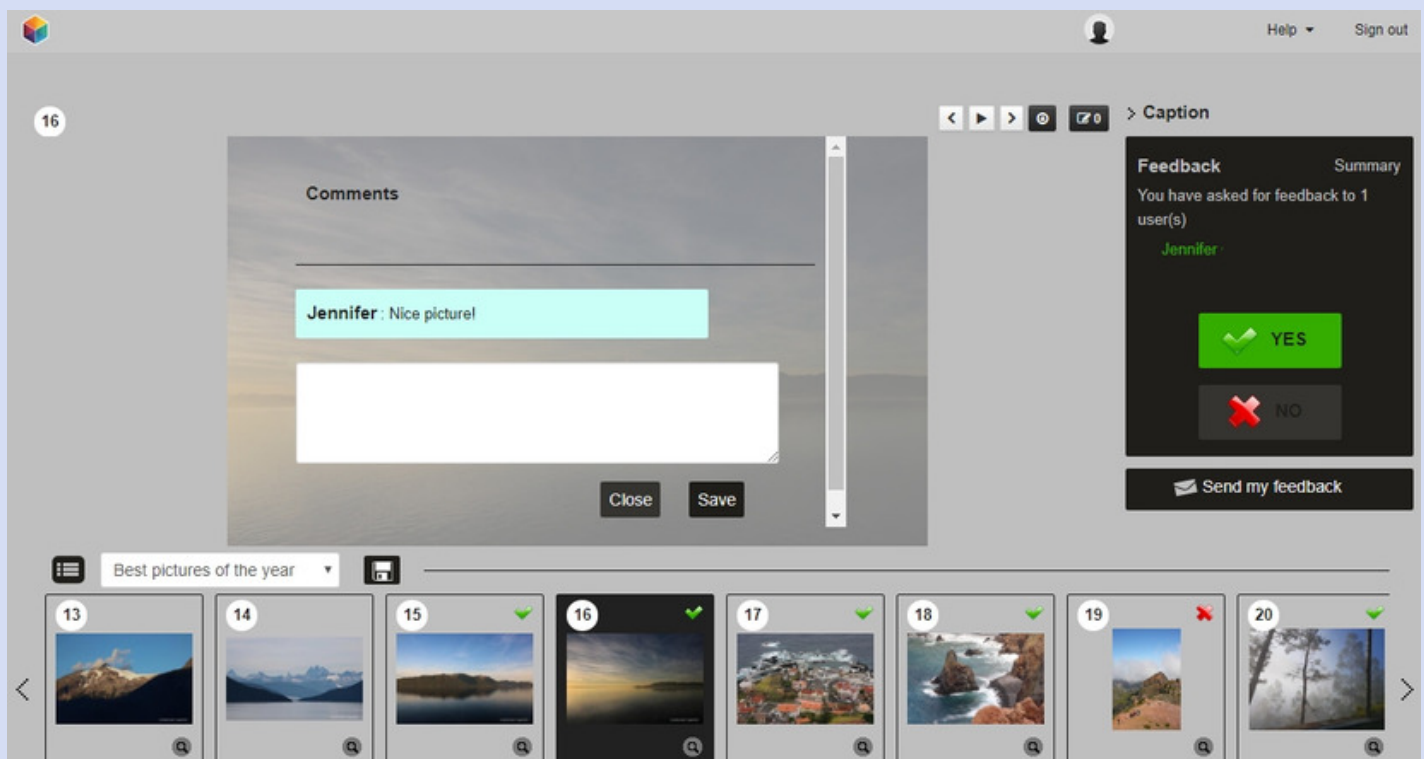
- Select one or several documents and click on Push in the action bar in Phraseanet Production.
- In the Push window, select or add one or several users you wish to send the documents. Give them the rights to download the documents (or not), then click on Send.

## THE FEEDBACK

The use of the Feedback is the same than the Push. The difference is the additional options and rights.

- "Download HD" to allow the user to download the HD.
- "Contribute", option by default that allows the user to authorize to give his feedback (Yes/No) on the documents and to annotate them.
- "See others" allows the recipient to view the others' feedbacks and annotations.

Use the form to setup the time of the feedback request.



## THE LIST MANAGER

The List Manager allows to setup and operate lists of recipients for the Push and Feedback requests. On the left of the Push window, select the List Manager to get an access to the features.