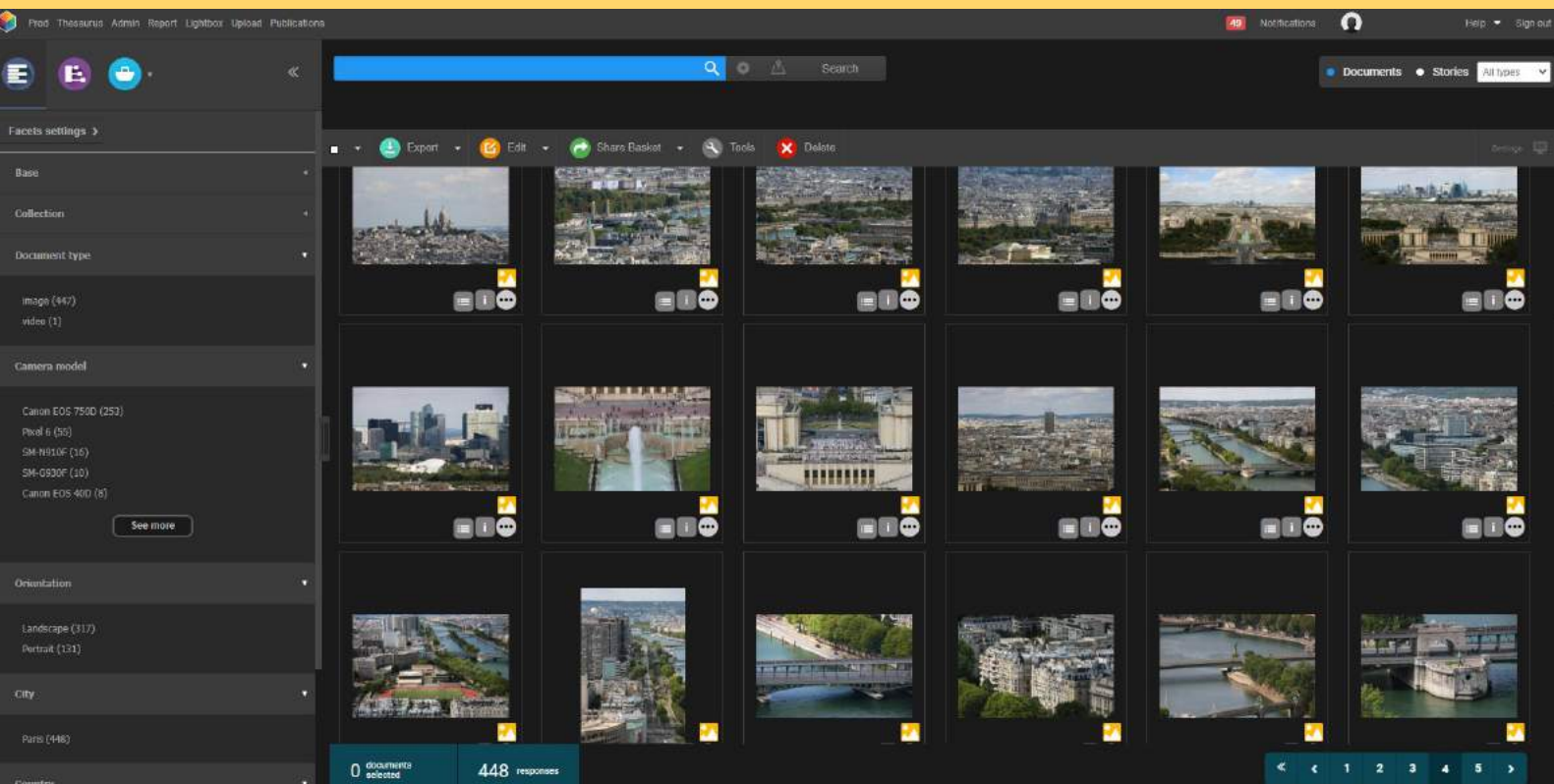




Phraseanet Quickguide

Open Source Digital Asset Management software



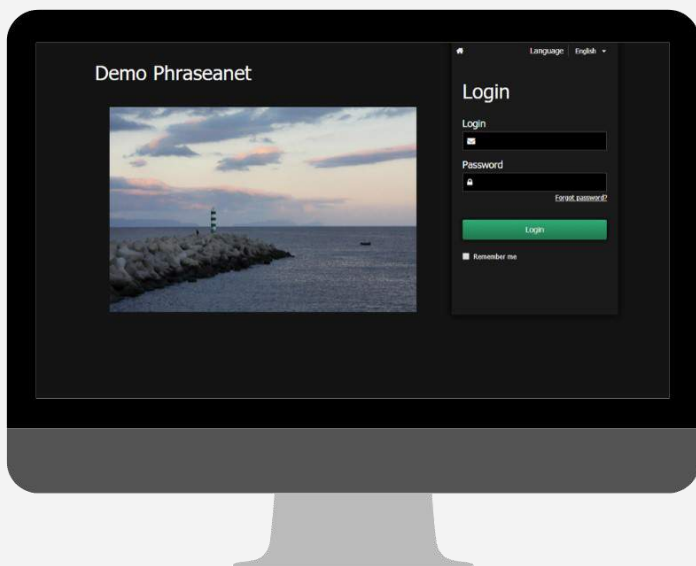
Phraseanet Quick Start Guide

Release 4.1.8

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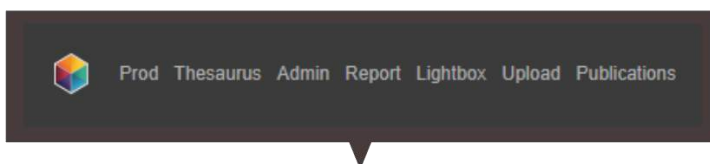
Login



- 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*.

The interfaces

The Phraseanet *menu bar* allows the user to access the interfaces of the application.



- **Thesaurus:** Vocabulary control
- **Administration:** Manage the database, the users, advanced setup...
- **Report:** View the statistics
- **Lightbox:** Collaborative tool. Push and feedbacks, annotations.
- **Upload:** Upload documents in the database, duplicates management
- **Publications:** Publication threads

- **Production:** The most important interface in Phraseanet. Manage, search and display media files, edit, create baskets and stories, send and export documents...

Warning! *The interfaces depend on the users rights.*

If you don't see one or several features, this means that you don't have the necessary rights to perform these actions.

Upload: Add documents

Upload by batch, easily and quickly,
media files into the database

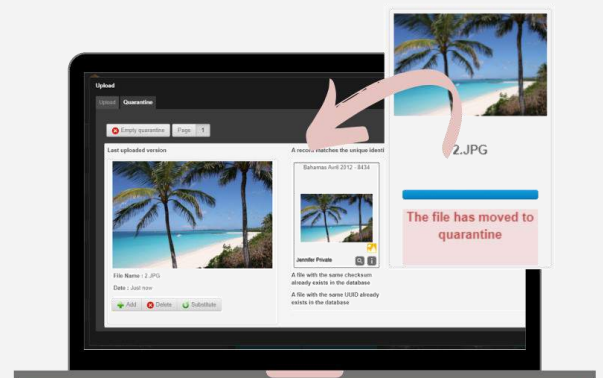


- 1 Select documents to add**
Click on *Upload* in the menu bar to launch the interface, then on *Select files*. Selected files will appear in the left part of the screen.
- 2 Choose the collection**
Choose the collection from the drop-down list. Optional: apply status or reorder media files if necessary before import.
- 3 Send**
Click on *Send*: All media files will be transferred to the selected collection. You can see the progress bar on the right part of the window. A green message below each thumbnail states that the document has been transferred into the database successfully. The message is in red if the document has entered the *Quarantine* instead.

The quarantine: For duplicates and non-compliant documents

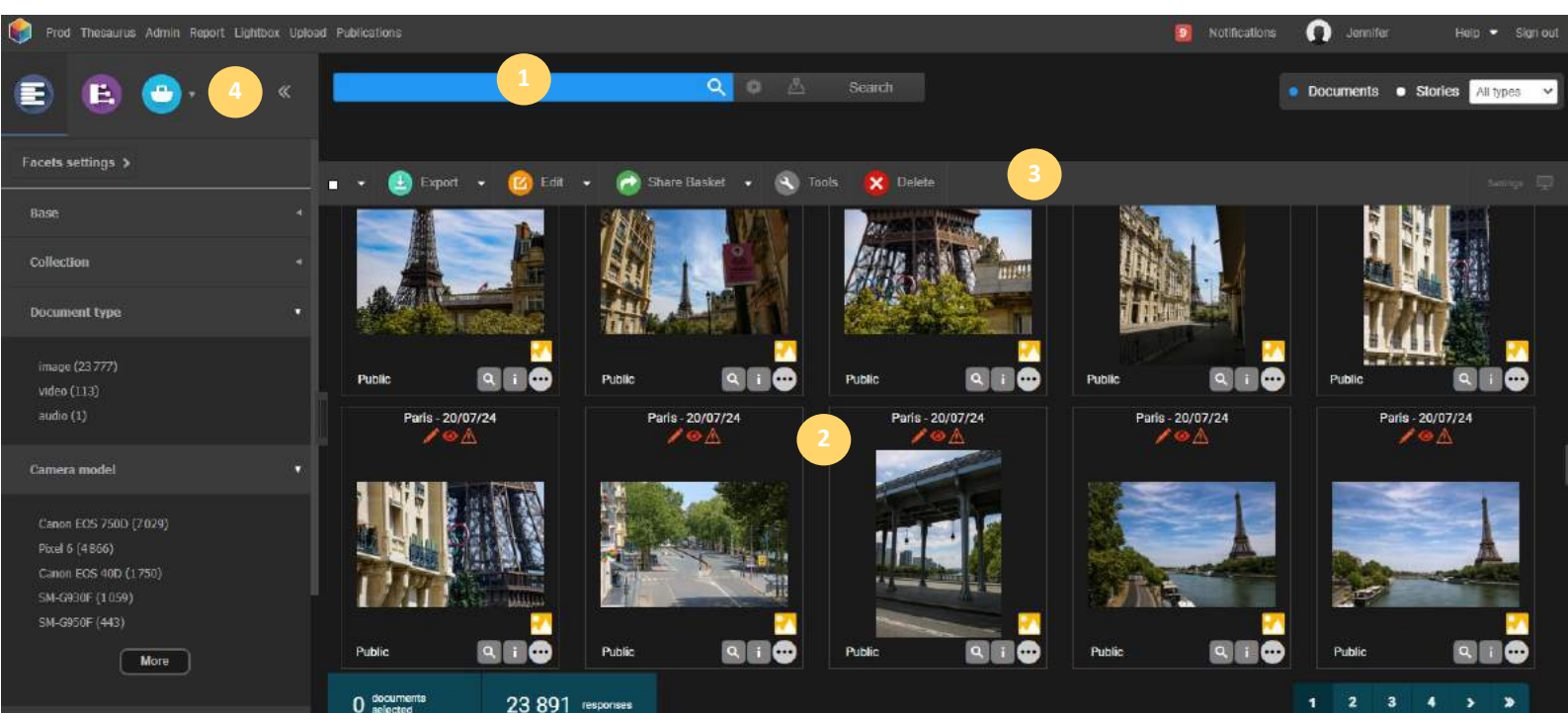
When adding documents, some files may automatically be moved to the *Quarantine*: The *Quarantine* tab is displayed next to the *Upload* one.

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



Production: Manage your assets

Search, display, edit, publish, share...
Production is a workspace divided into 4 zones:



1 The search

Enter a keyword to find documents (*simple search*) or use filters to refine the search by clicking on the wheel (*advanced search*), through the facets or using the map.

2 The results display

This zone displays the results of a search.

The action bar

3 It allows you to perform actions on documents. For example: edit, export, share a basket, send documents (Push), delete...

The workzone

4 Several tabs: the facets, the thesaurus, the baskets and stories, Expose... (see page 19).



Do you need to learn more about *Production* or any other feature of Phraseanet?

The Phraseanet official documentation is available online here: <https://docs.phraseanet.com>

Search for documents

Phraseanet uses the powerful open source search engine *Elasticsearch*.

The simple search

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

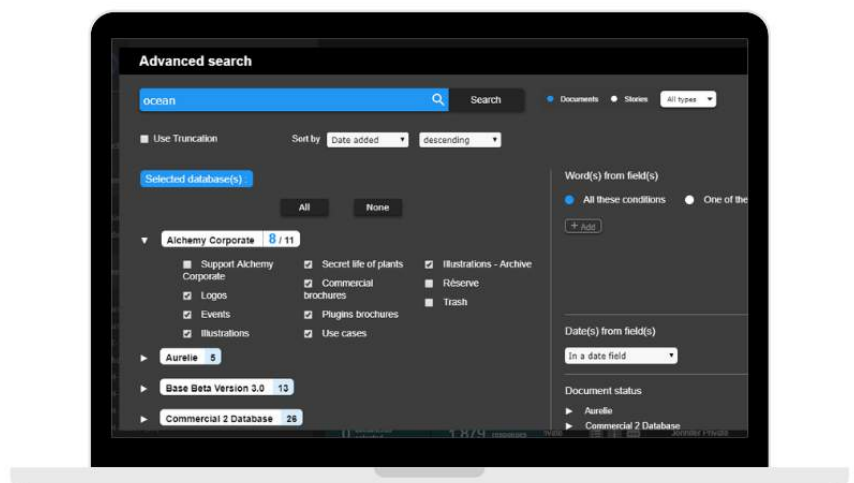
✓ Enter a keyword, then click on "Search". (If the field is blue, it means filters have been activated. Click on « Reset » in the advanced search, if necessary.)



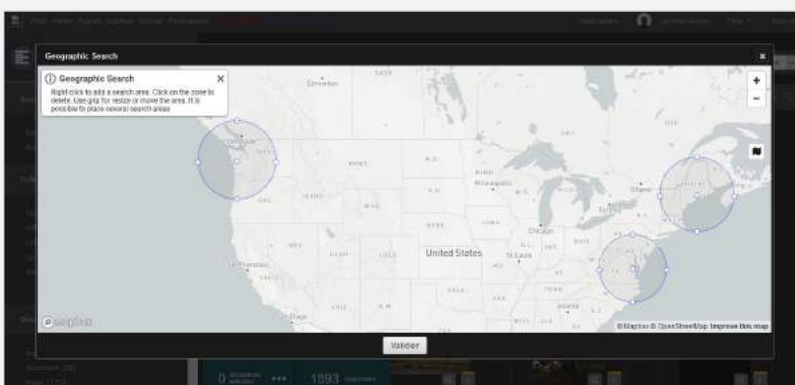
The advanced search

✓ Click on the wheel next to the *Search* button to display the advanced search window.

Choose databases and collections where to do the search. There are also additional filters.



The search by geolocation

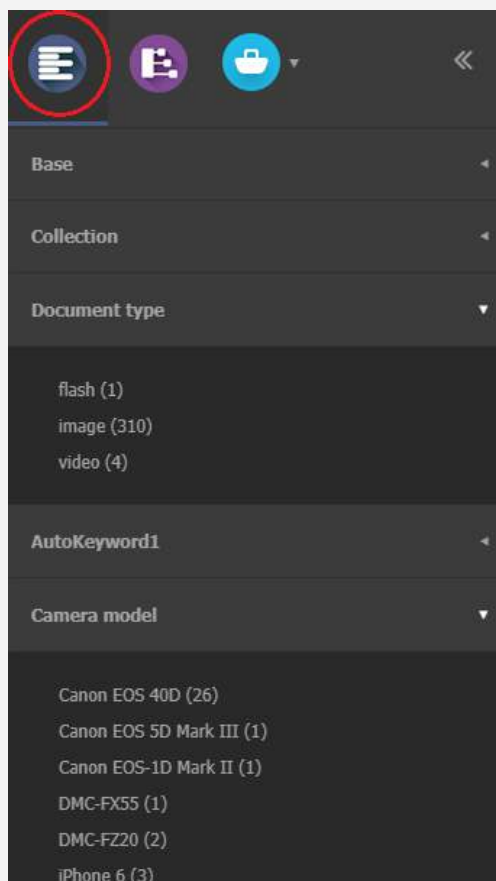


Search for geolocated media files by choosing places on a map.

✓ Click on the *Map* icon to display it, zoom in / zoom out if necessary, then do a right click on one or several zones to select. Left click on the zone to deselect.

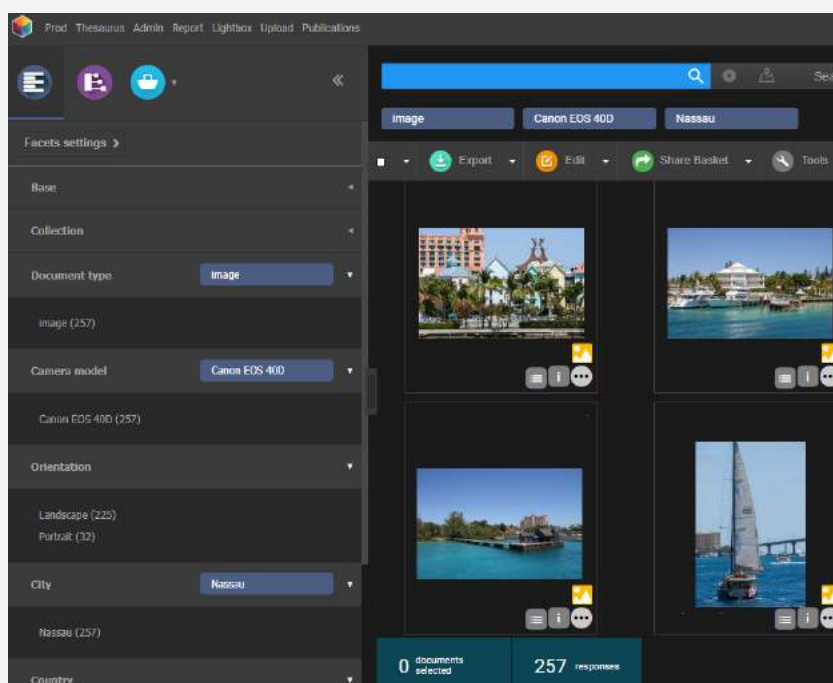
Facets: A true mapping of the response

Faceted navigation is another way to search for assets. It enriches the experience for users who browse in a very intuitive and guided way.



Facets can be found in the workzone, on the left side of *Production*.

Example of facets: document type, keywords, city, country, orientation, camera model...



✓ Combine several facets to display the search and filter the results by clicking on the value of chosen facet (a blue label appears).

The user can create associations of filters for a more relevant search.

✓ A click on the - on the selected value reverses the process (the label becomes red). This excludes some results of the search.



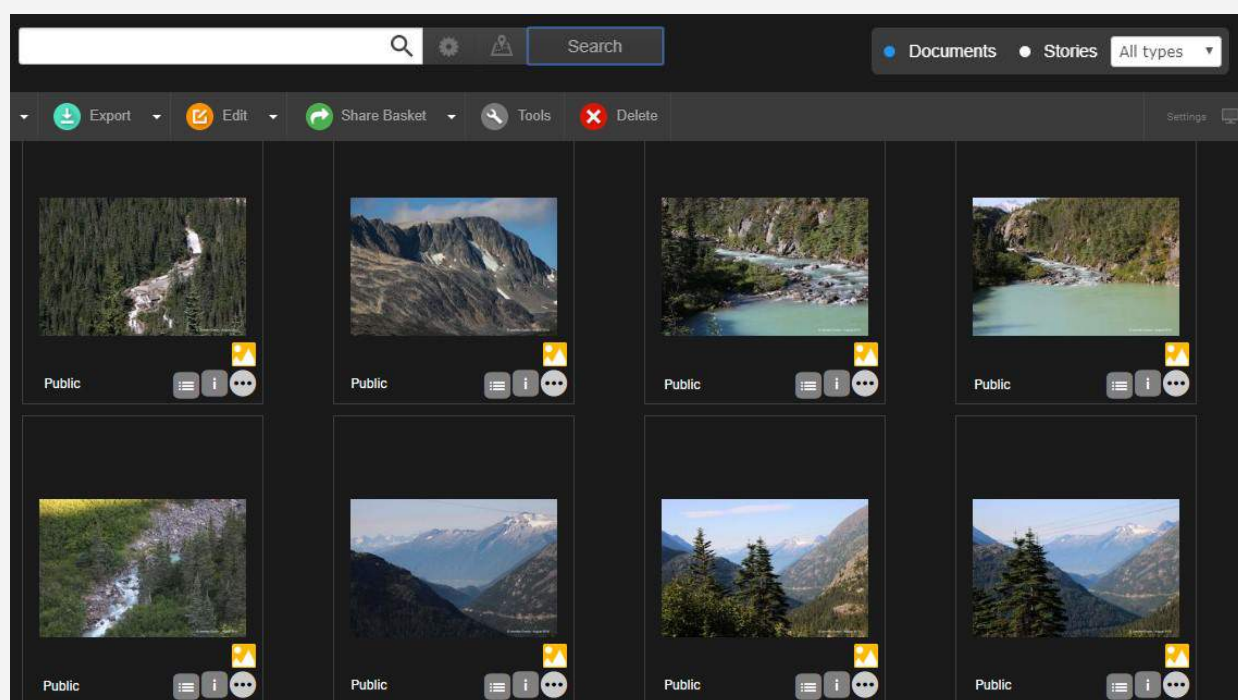
Good to know: How to hide facets? Click on the icon on the left of a facet, which is displayed on rollover. To undo, go to the *Preferences* (see page 9).

Display the results

Following a search, the documents appear in the display zone of the results, at the center of the page

Display modes

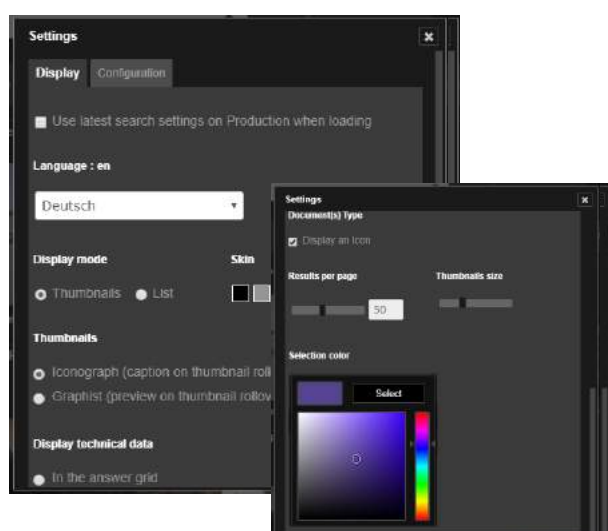
They can be displayed as thumbnails or list.



Chosen display mode: Thumbnails

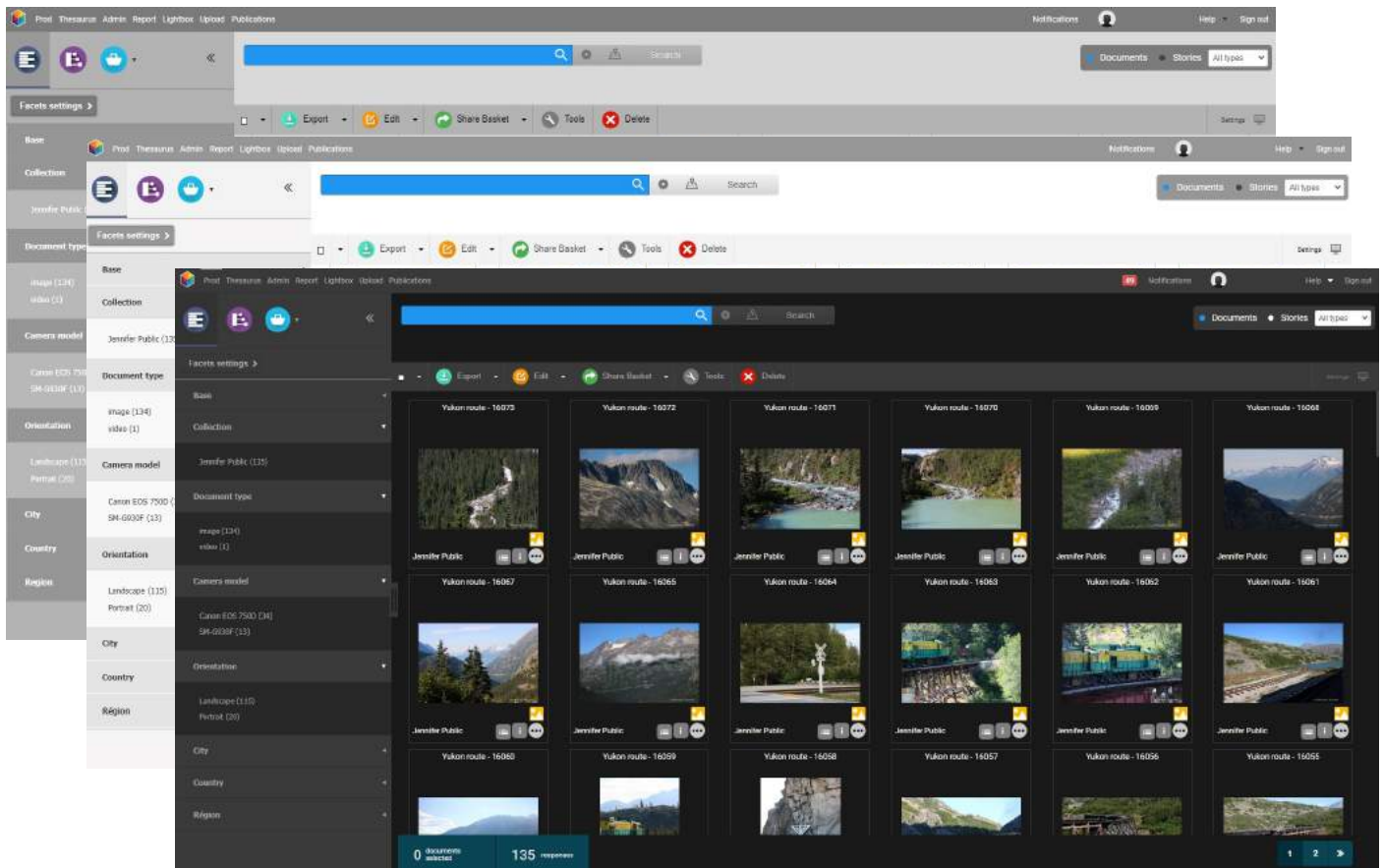
Display settings

The *Settings* button, on the right of the action bar, allows you to customize your own space: display mode, theme, size and number of results per page, selection color for the documents,...



In the *Display Settings*, customize your interface by selecting a color.

✓ Choose among the following themes: grey, black or white.

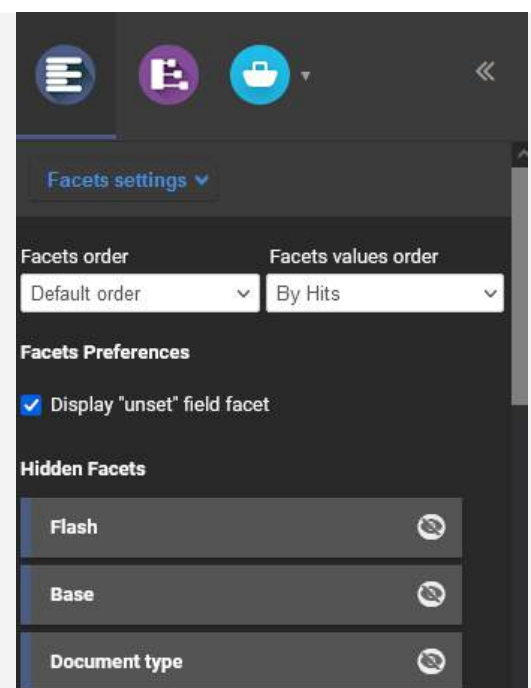


Facets display settings

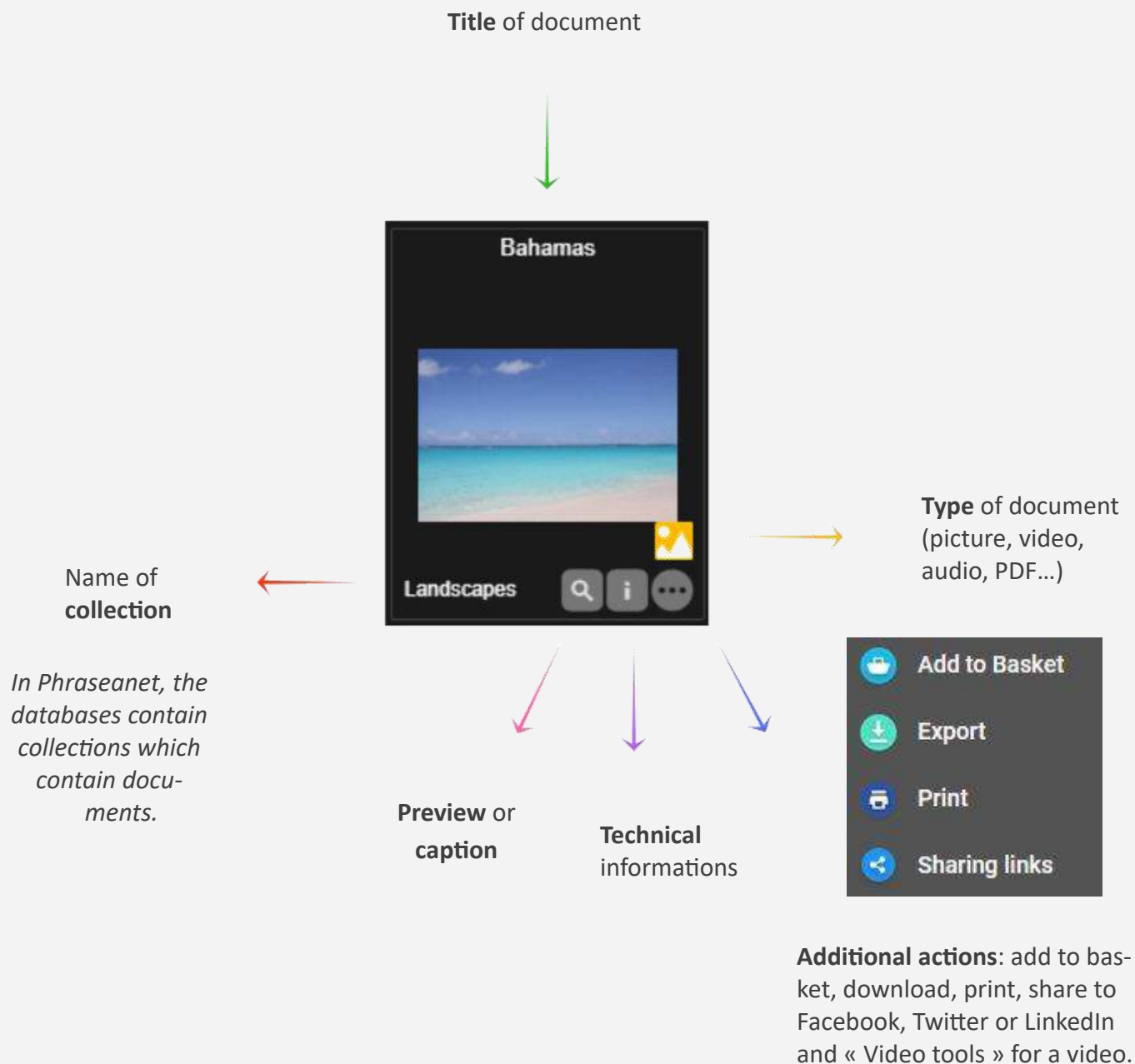
In the Workzone, in the facets tab, you can find the facets settings. One click to display many options. First, the facets order can be modified.

You can also find the facets which have been hidden. Click on one or several facets to make them visible again in your *Production* interface.

« Display unset field facet » allows you to display a facet for pictures which don't have any information entered in a field, so that you can then click on the facet and complete the indexation.



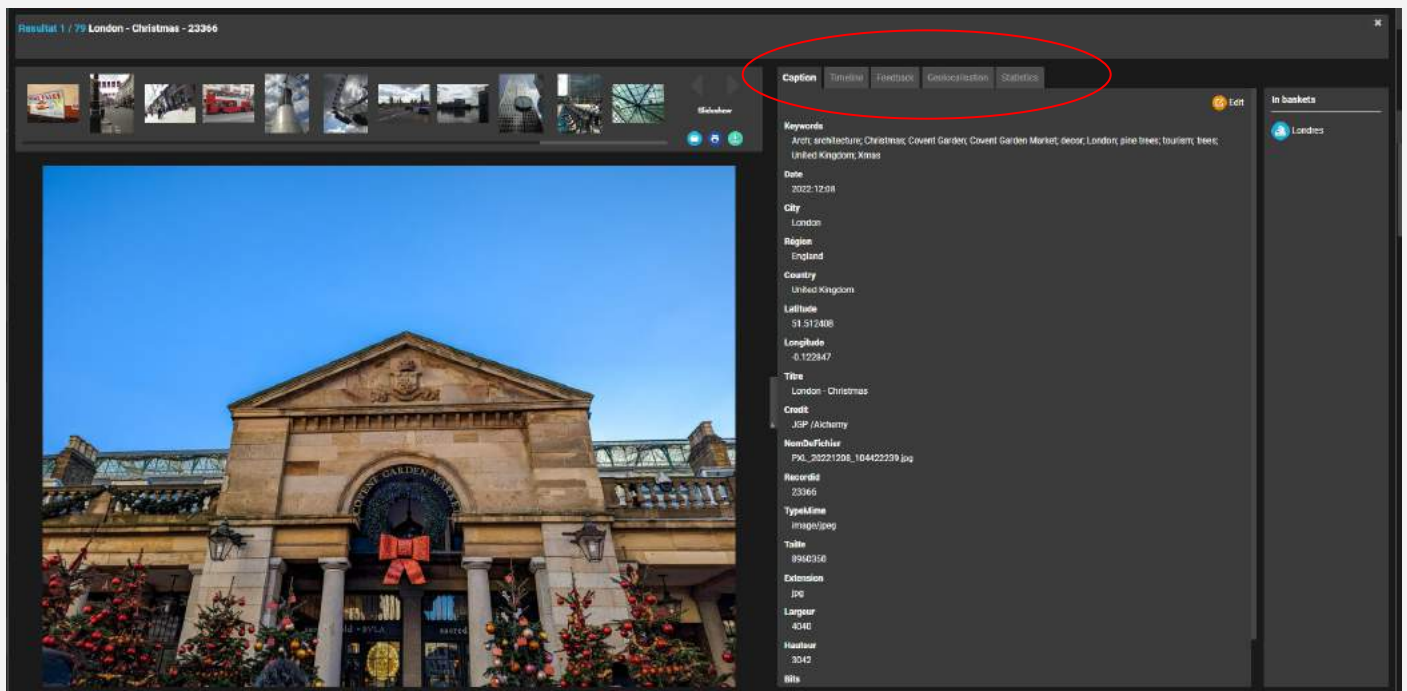
For each thumbnail, the following information:



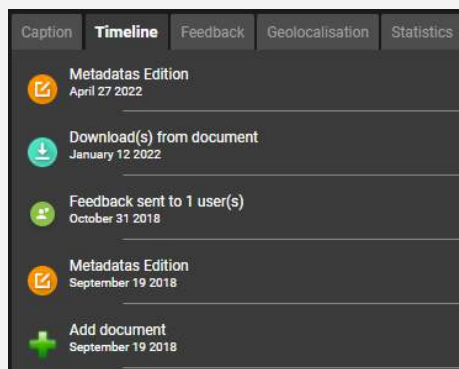
NB: Information appear on rollover: Depending on the chosen view in the Display Settings, the preview (*graphist view*) or the caption (*iconograph view*) will be displayed.

The detailed view

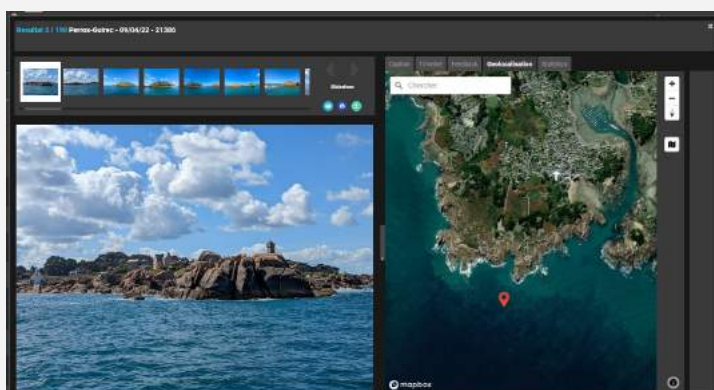
Double click on a thumbnail to display the detailed view. This view contains all information about the document: preview, caption, timeline, statistics, geolocation, link to baskets or stories...



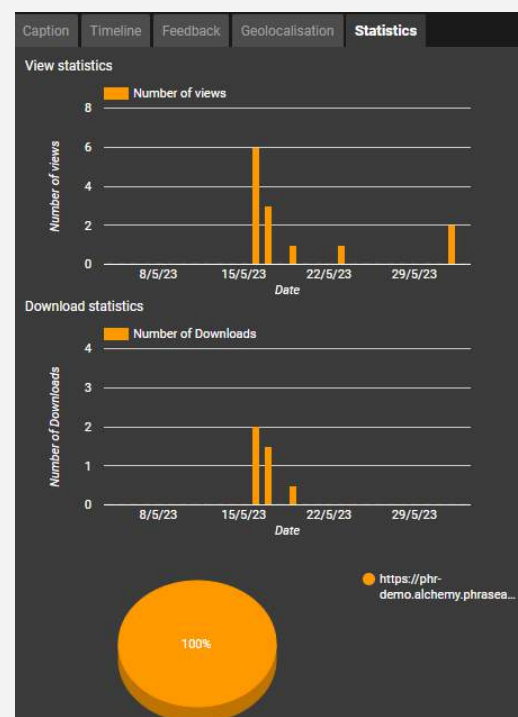
« Caption » Tab



« Timeline » Tab



« Geolocation » Tab

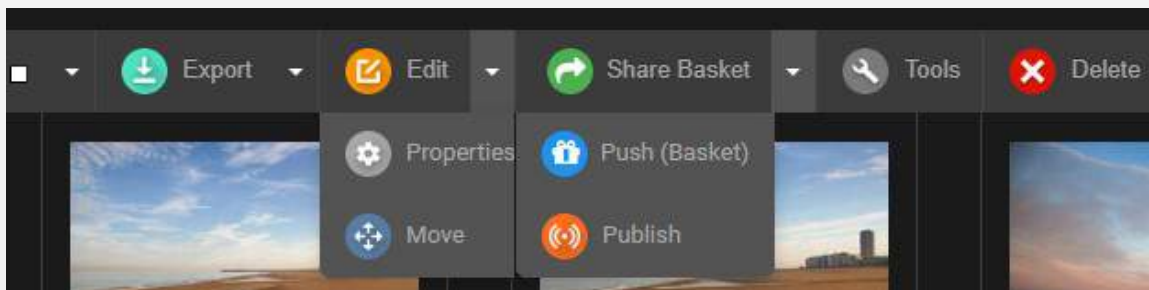


« Statistics » Tab

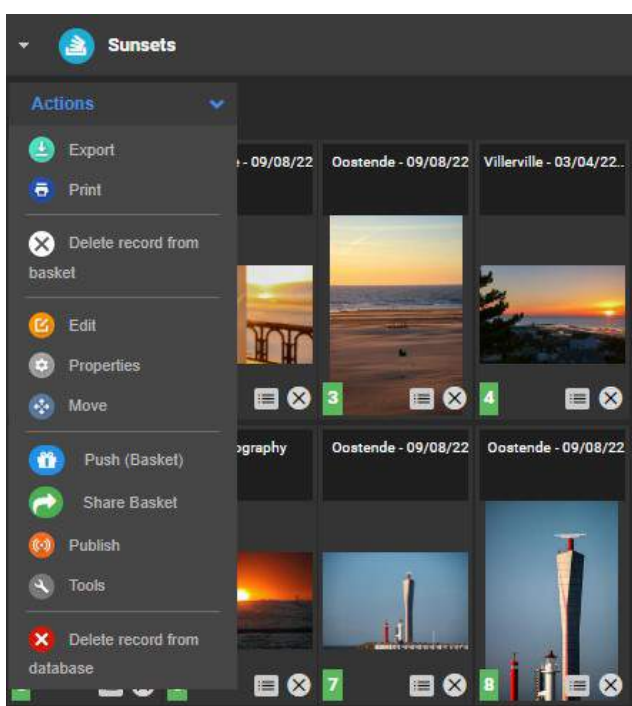
Perform actions on records

The action bar, located above the search results, is intended to perform many actions on the documents.

List of actions available from the action bar



- Export, Print
- Edit, Properties, (status, type), Move (move to another collection)
- Share a basket (with or without Feedback), Push, Publish
- Tools: regenerate subdefs, rotate, substitute, view metadata, share permalinks
- Delete



Basket action bar

Each basket gets its action bar.

Only the *Delete* buttons differ.

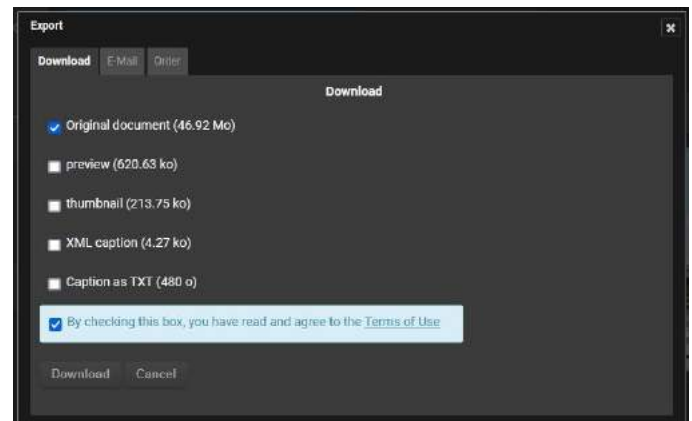
In the baskets, there are two of them: *Delete from the basket* (it's deleted from the basket but the document stays in the database), or *Delete from the database* (the document is also erased from the database).

« Export » action

- ✓ Select one or several documents, then click on the *Export* button.

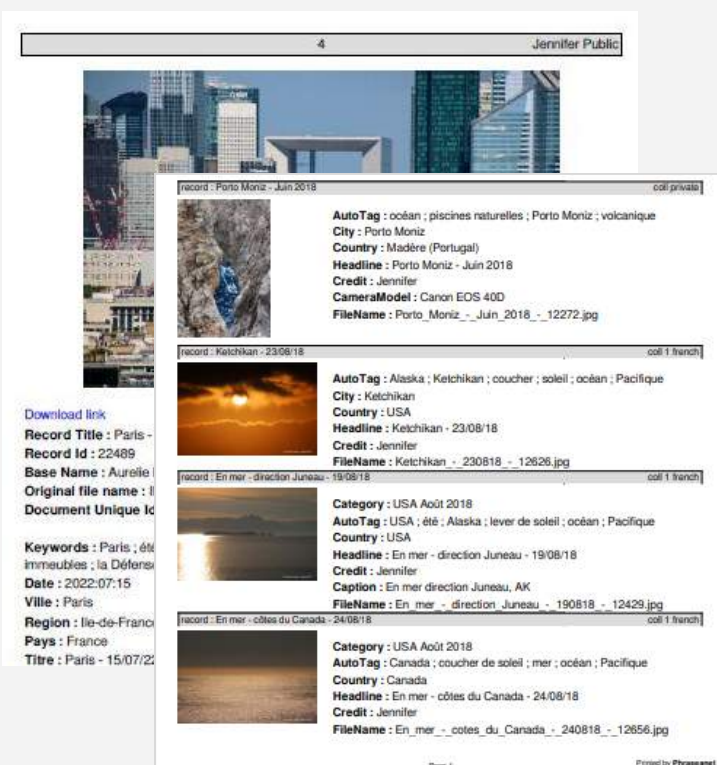
The *Export* feature has three tabs (+ the FTP).

- The first, *Download*, allows the user to download the documents, in the resolution of his choice.
- The second, *Email*, allows the user to send documents to an email address.
- The third, *Order*, is for orders to users who don't have the required rights to download.



« Print » action

Print is a specific type of export. In Phraseanet, you can print captions in a PDF file.



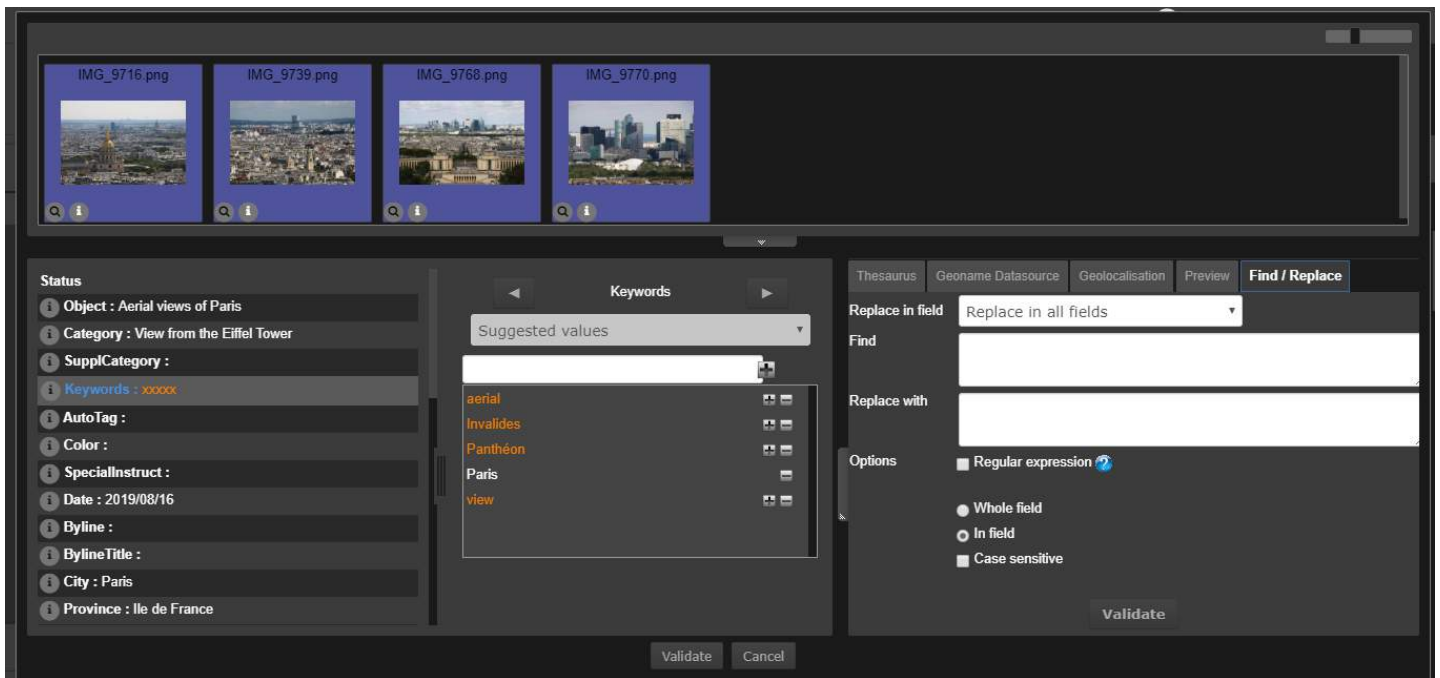
This feature gives you the ability to print the thumbnails, previews, captions of documents, in an auto generated PDF.

- ✓ Select one or several documents and click on *Print*.

Then, choose among the following: preview, preview and caption, preview, caption and thumbnails, description, thumbnails list, add a title (optional), protect it with a password, add a download link and choose a validity link...

« Edit » action

Edit captions of the documents and stories of a same database. Documents can be edited one at a time or by batch.



✓ First select documents, then click on *Edit*. The editing window appears: Above, the thumbnails of the selected documents. On the left, the titles of the fields. At the center, the space to fill in the fields. On the right, many useful features: thesaurus, preview zone, find/remplace, geolocation, templates.

The best thing would be to work by batch and sub-batches. For example: Select 10 pictures of Paris. Enter for all pics the « Paris » keyword. Then, only select thumbnails showing the Eiffel Tower: here, you enter the keywords: « Eiffel », « Tower », « monument » and so on.

When you select again all your documents in the batch, if the field doesn't contain the same informations, then the text will be orange and on the left, there will be small crosses. If on the contrary, the fields contain the same information, the text color will be white.



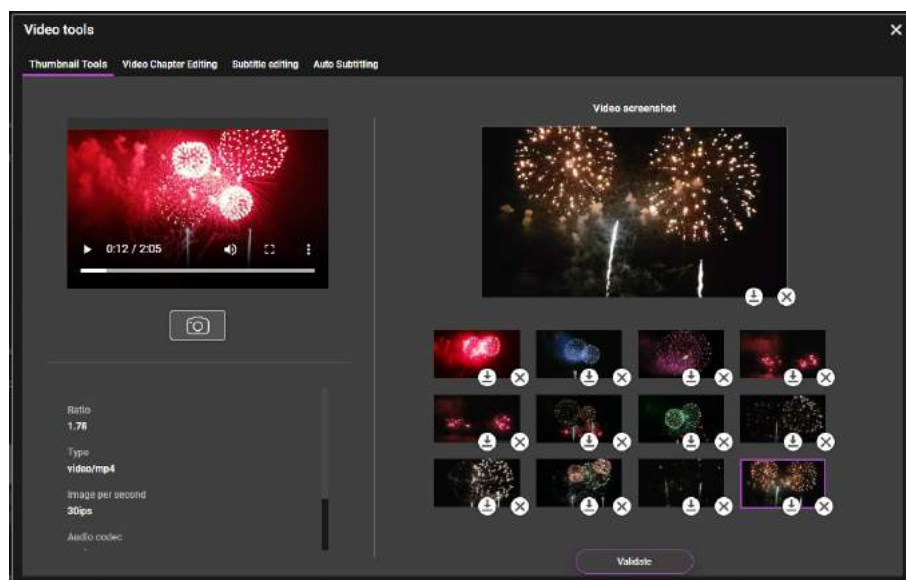
Did you know? It is possible to edit the stories (as the documents), but also to set a thumbnail as cover document. By default, the stories are pictured as a blue folder.

✓ To add a thumbnail as cover document, first search for stories (check the box near the search zone), select one, click on *Edit*, then on the arrow under the chosen thumbnail and click on « *Set as cover document* ».

Video Tools

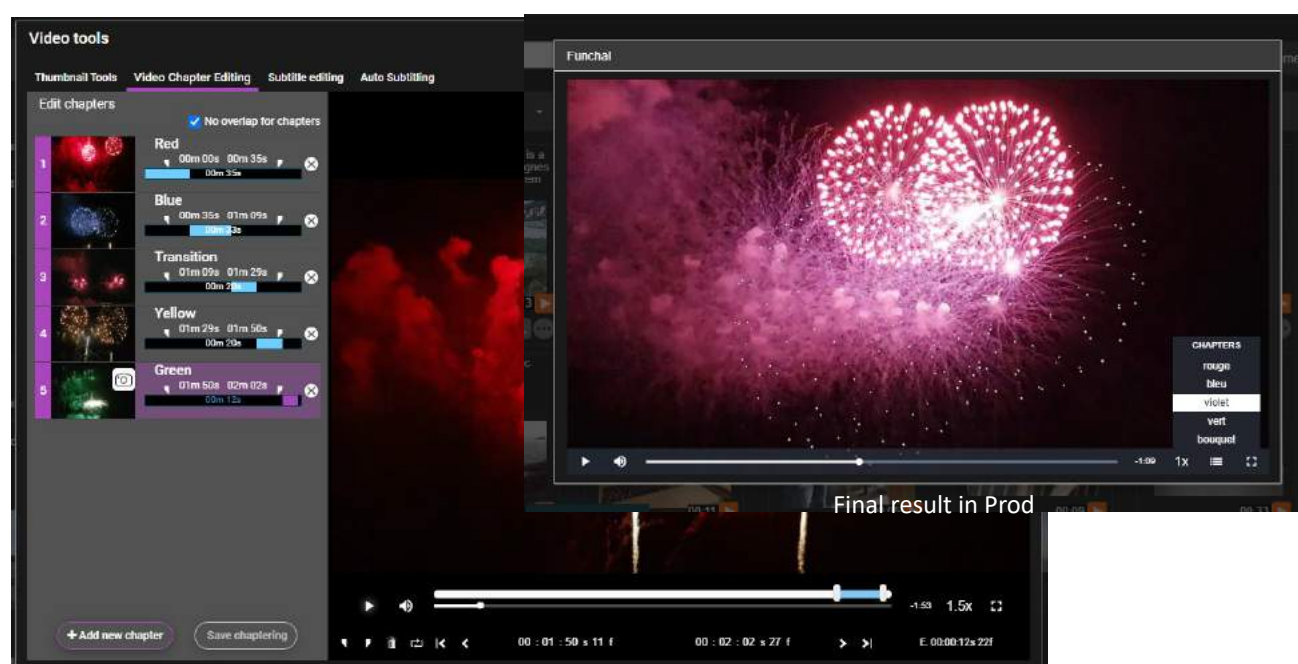
The button *Video Tools* gives access to two major features for the videos:

- The first feature allows you to *change the thumbnail of a video*. Play a video, it will be possible to capture many moments. You can download the screenshots. Finally, choose a thumbnail; it will be displayed in the search results.



Download the thumbnails from the video tool

- The second tab displays a major feature of the version 4.1: *the video chaptering*. Select video sequences, enter titles... Then, you will be able to read the videos quickly in *Production*, thanks to these new chapters.

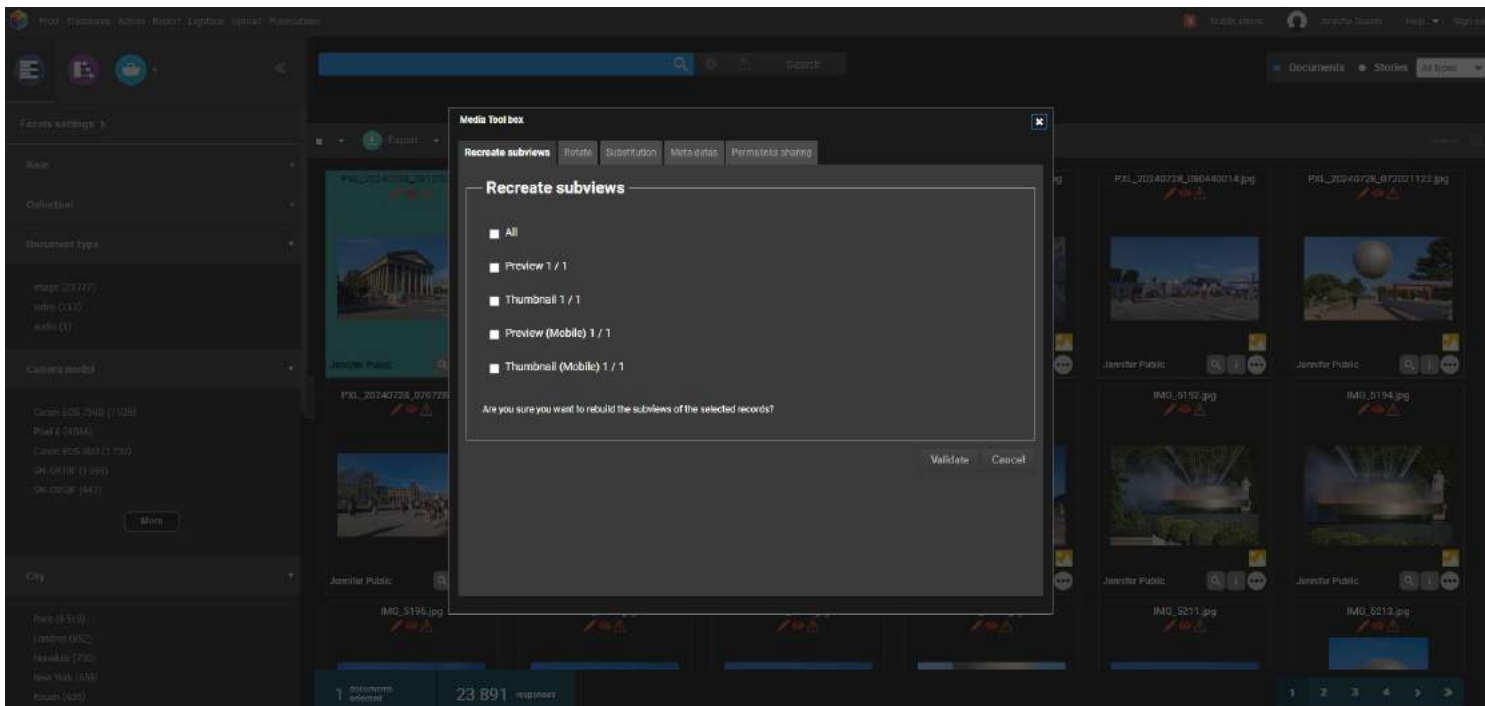


Creating chapters and titles in the video tool

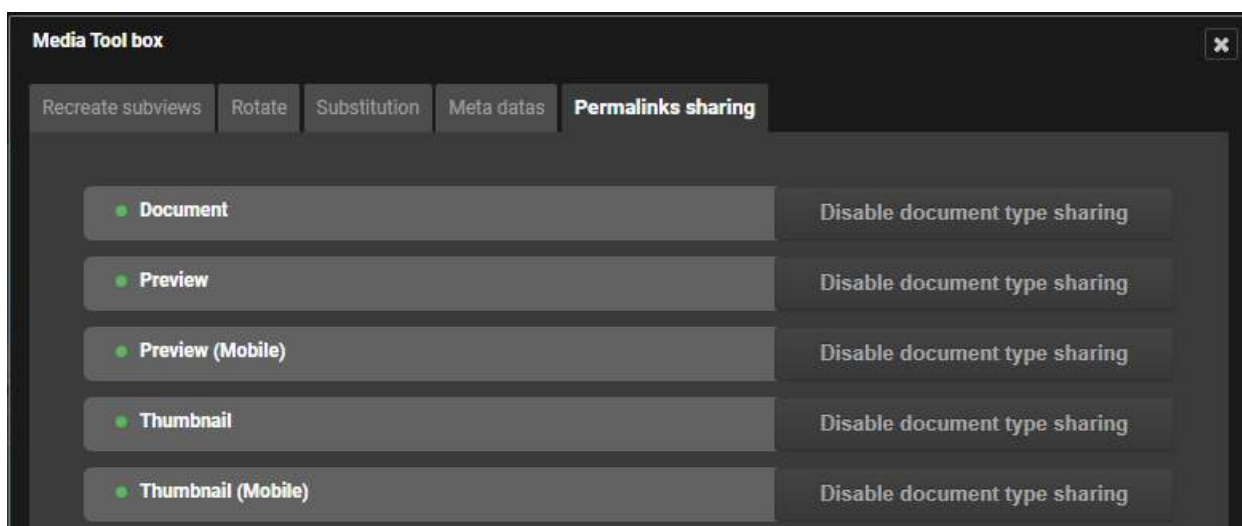
« Tools » action

Select an image. Click on the *Tools button* from the action bar, which allows you to do some actions on the pictures.

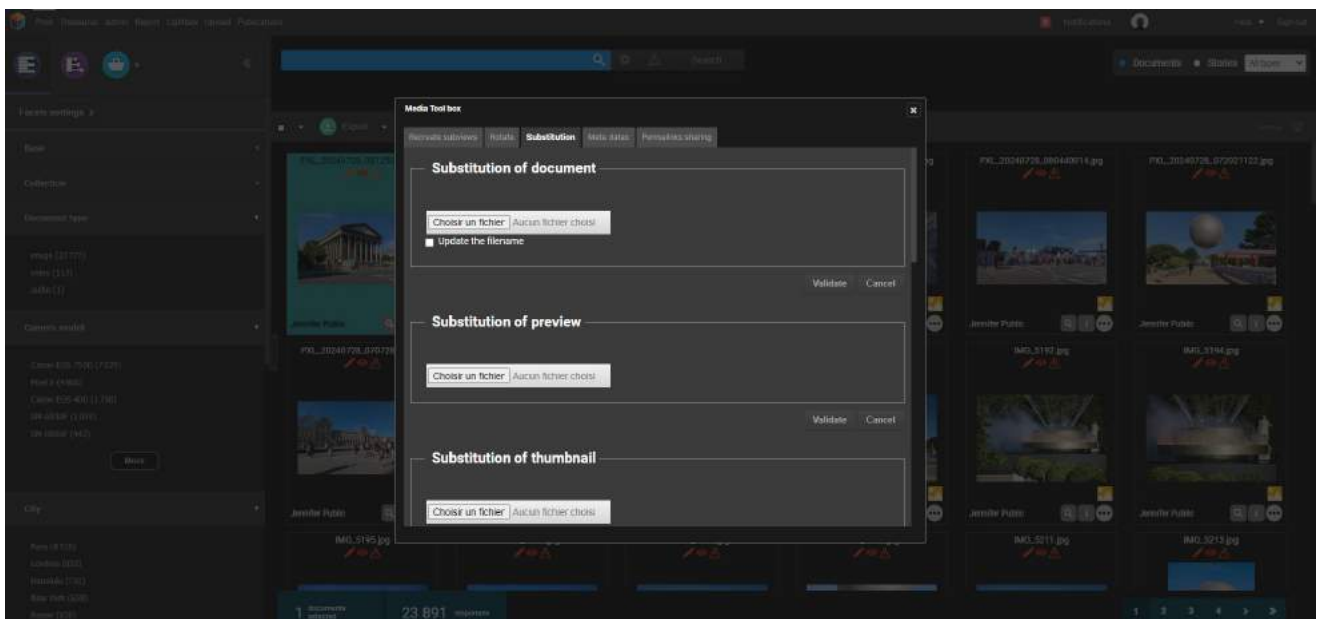
✓ **Regenerate subdefinitions** (choose: all, or only: original document, preview, thumbnail, mobile thumbnail, etc.).



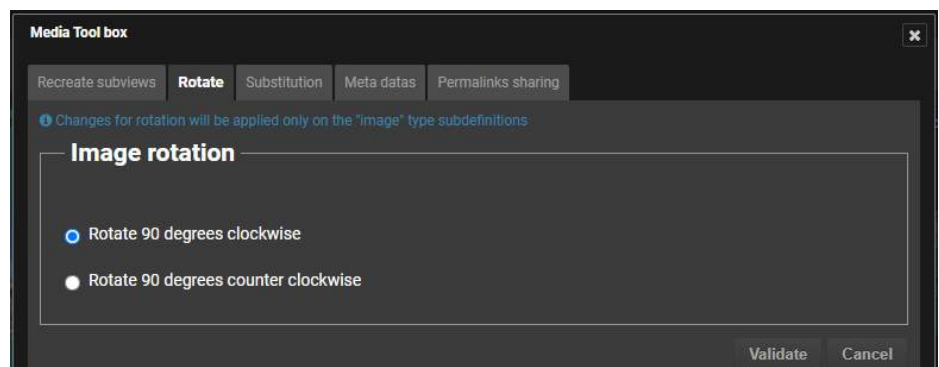
✓ **Share or deactivate permalinks**



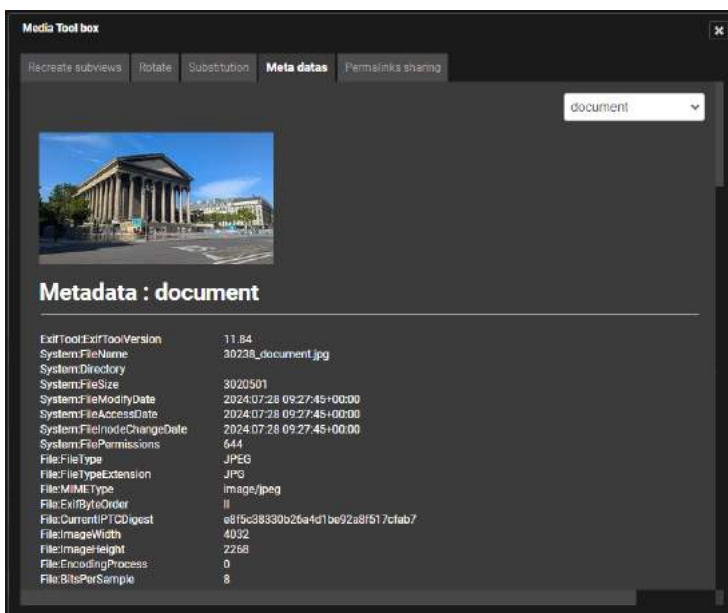
✓ Substitute a document and/or subdefinitions



✓ Rotate

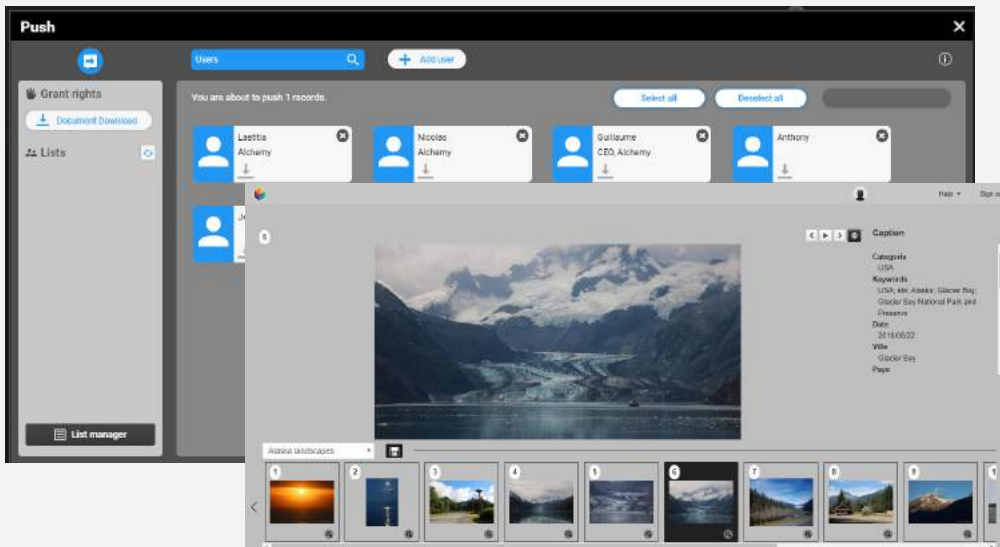


✓ Access the image metadata



« Push » and « Feedback »

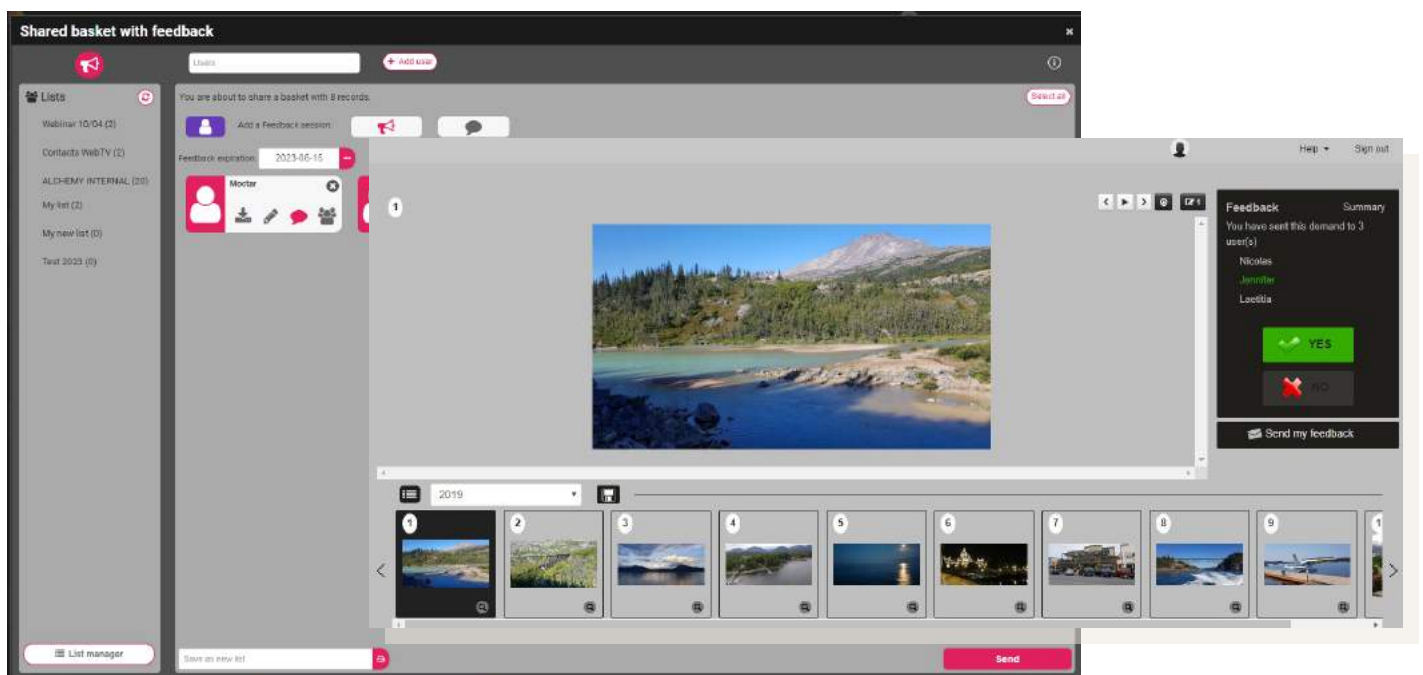
The Push and the Feedback are two actions aimed to transfer documents to users, whether they have a Phraseanet account or not. They can be found in the workzone of *Production* but also in the dedicated interface, *Lightbox*.



- Use *Push* to send documents to users
- *Feedback* is intended to receive users' ratings on documents

✓ Select documents, click on the *Push* button. Select users, give the right (or not) to download documents, then click on *Send*.

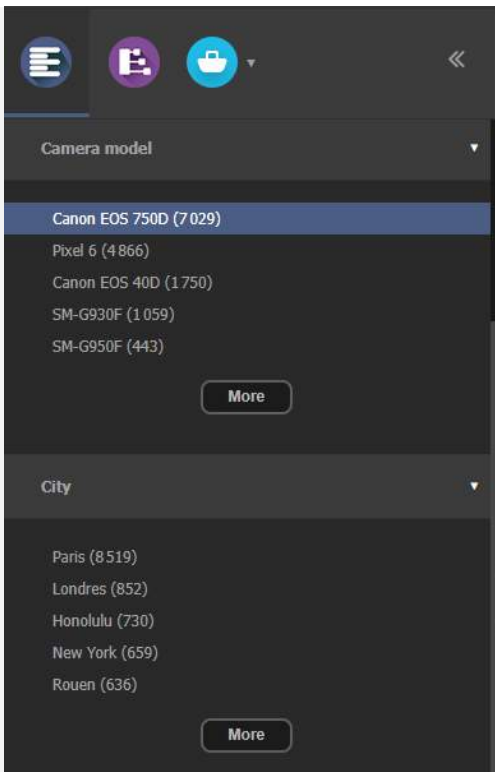
The *Feedback* process is the same, but has additional options. A user can give more rights: download, but also: contribute, see the others' choices and annotate. ✓ To access the feedback, share a basket and then click on the corresponding icon (see also page 20).



The Workzone

It displays the facets, the thesaurus, the baskets and stories and Expose.

The Workzone can be hidden by clicking on the arrows, on the right.



The facets

Facets are displayed in the first tab.

They guide the user in his search and allow him to refine the results (as previously seen page 7).

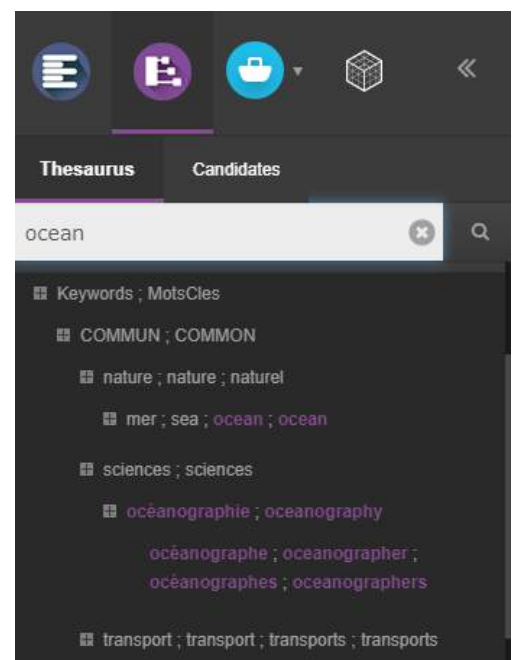
On the left: the icon on the left of the facet's title, displayed on the rollover, shows it can be hidden. Just click on it to make it disappear.

The Thesaurus

Although the Thesaurus has its own interface, it can also be found in the *Production's* workzone.

Users can browse assets, allowing to narrow or expand searches.

For contributors: adding candidates can be done either in *Thesaurus* or in *Production*.

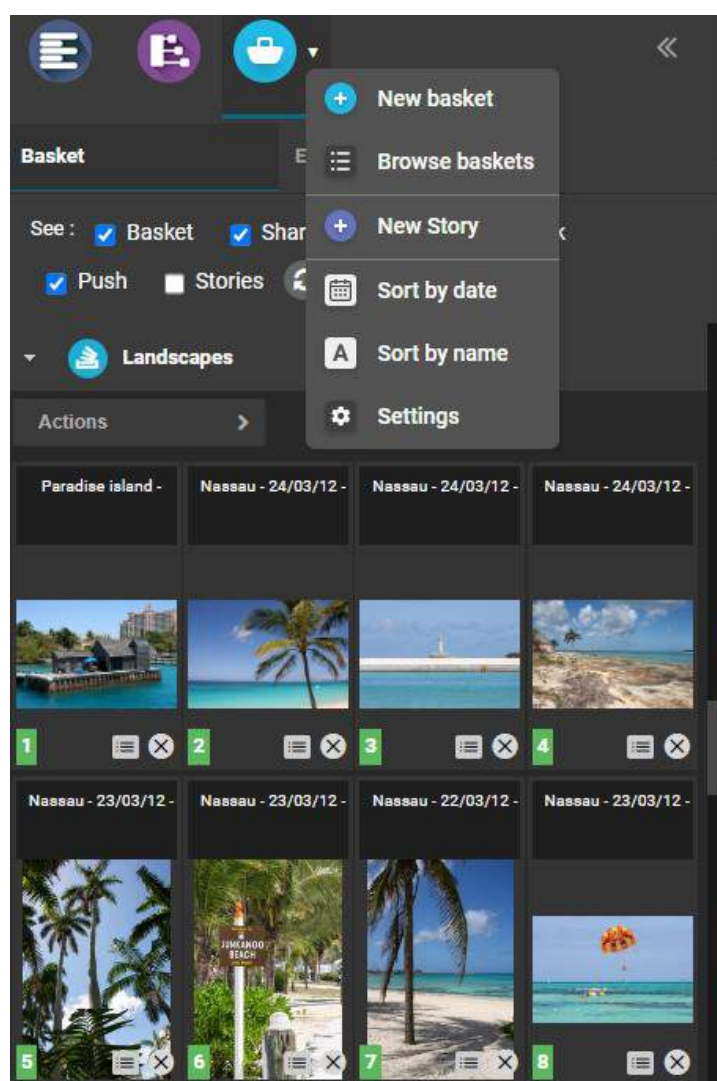


Baskets and Stories

Baskets and Stories allow you to set aside media files in order to retrieve and work on them later.

The basket belongs to the user who created it. It is recognizable by its color: Light blue. The story is navy blue.


The basket can be shared via the *Push* and the *Feedback* to other users to give them access to a selection of documents and can be also shared (available from Phraseanet V4.1.6).



✓ To create a new basket, click on the arrow next to the basket icon. Choose *+ New basket*. The basket opens. Then, drag and drop documents. Or select documents, then create a new basket and check the box *Add my current selection*.

Create a story the same way by clicking on *+ New story*.

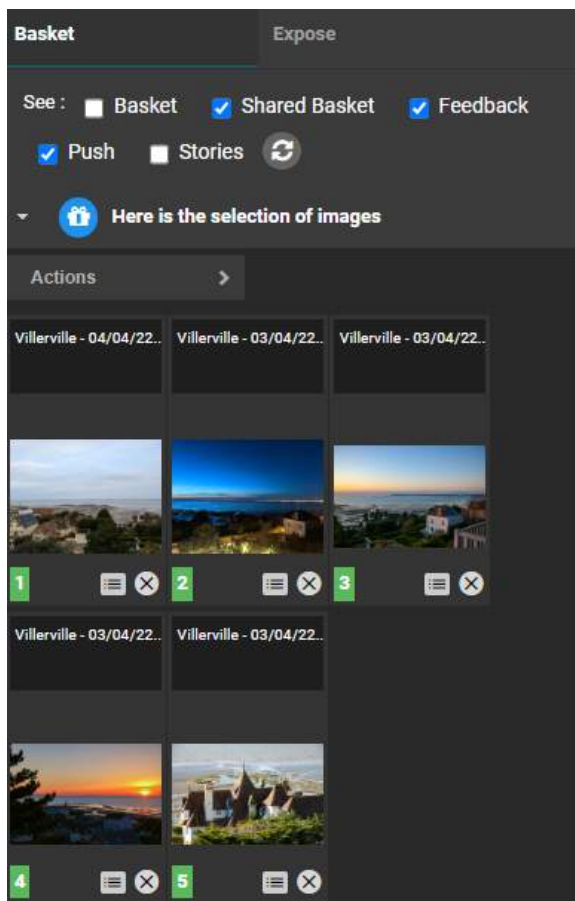
For actions available on a basket, see page 12.

✓ To request a feedback on media files, you have to create a basket and then click on the button « *Share basket* ». A window opens, click on the icon: 

Finally, enter an expiration date for the feedback and select users, give them rights by clicking on the icons.



Contrary to a basket, a story can be searched by any user who can access the collection where the story is.



At the top, you will find small **checkboxes** allowing you to display several types of baskets and the stories. This feature is useful when you get an important number of baskets in your workzone.

✓ Click on the title of a basket or a story to display its content.

To find your way around basket icons:



A simple basket (selection of documents)



I have received a basket (Push)



A basket I have shared



A basket shared with me



I have requested feedback on documents



I have received a feedback request

With Phraseanet, create baskets and share them with other users. You will be able to find the « *Share Basket* » button in the action bar menu.

✓ Select documents and click on the button, either from the action bar or from the basket menu. A window opens.

✓ Share it with one or several users. ✓ Add an expiration date for the basket if you wish (if you leave it empty, it means the basket is valid indefinitely). ✓ Add some rights for each user of the basket (download, modify). Please note that the recipient of the basket may leave the basket sharing if he wishes by clicking on the three dots next to the basket title and then by choosing « Quit share »: the basket then disappears from his workzone.



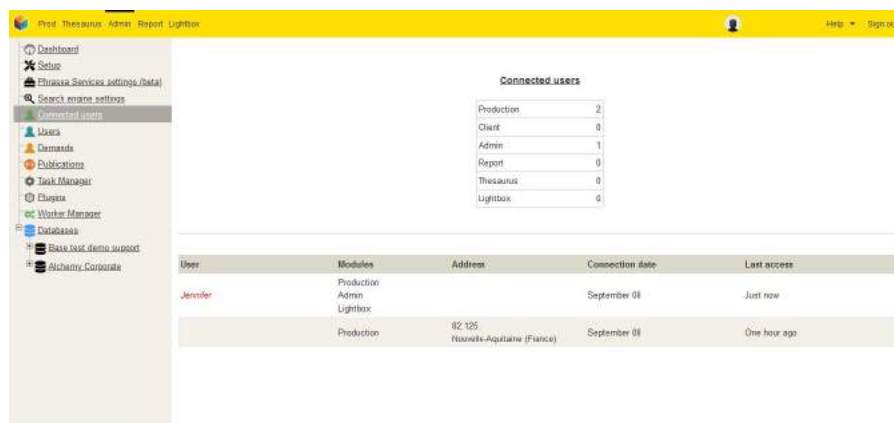
What is *Expose*? *Expose* is an option you will find in the workzone, next to the baskets. It is used to create, preview and customize web galleries! In only a few clicks, you can add media, texts, layouts and even your own designs to the CMS. Please contact us to learn more!

The other interfaces

These interfaces are available
from the Phraseanet menu

Phraseanet **Administration**: To manage the system

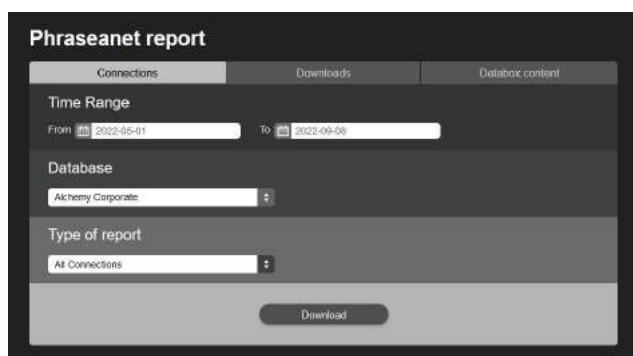
- Set up the databases and collections, subdefinitions
- View logged users in real time on the system
- Manage publications
- Manage signup requests, users rights, user templates, create guest access...



Phraseanet **Thesaurus**: To manage the Thesaurus

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 documentary fields of the database structure. The right side displays the existing Thesaurus, as a browsable tree.

Phraseanet **Report**: To view the statistics



Generate statistics reports in .csv.

Three tabs (Connections, Downloads, Contents) give you a detailed reporting.

For example:

Number of connections by user, by browser or OS, number of downloads by user, by documents...

✓ Choose a time range, the collection and the type of report to download it.

Learn more

Find the Open Source solution on Github with all information
for the setup of Phraseanet:

<https://github.com/alchemy-fr/Phraseanet>

Also, please take a look at the online official documentation:
<https://docs.phraseanet.com>

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