PICTUREPARK

User Guide
Picturepark Content Platform

This user guide provides a tutorial and introduction to the Picturepark Content Platform. It covers and explains the first steps as well as the daily administrator and editor work. Some more complex functions and configurations are deliberately not covered in this user guide.
You may find the appropriate answers in the two guides linked below. The Picturepark Academy videos show some basic configurations in practice on a Picturepark instance. If you are looking for more in depth explanation about the configurations and possibilities of the Content Platform, please take a look at the Admin Manual.

The user guide is sorted by the three default user roles read-only users, editors and administrators. The further you progress in this user guide, the more complicated the topics become and the more permissions are needed to apply these options. If a function or option is not available to you in the Content Platform, you do not have the necessary permissions and must contact an administrator to extend your permissions.

[Admin Manual](#)

[Picturepark Academy Videos](#)

—— Relevant for read-only users

—— Relevant for editors

—— Relevant for administrators

1 Authentication

1.1 Registration

To access the Picturepark Content Platform, please visit the corresponding Picturepark start page and register by following these steps below.

- Open the Picturepark URL of your company (The URL is usually structured like this: https://**company.** picturepark.com)
- Select "register"
- Fill out the form and captcha
- Submit your request

If an administrator already created your Picturepark account and you have received a Picturepark invitation, you can click on the link in the email and register from there.

After you registered you should now receive an email asking you to confirm your email. As soon as you confirmed your email adress, the administrators get notified and will review your account. If you now log in and the administrators did not approve your account yet, the following message will appear.
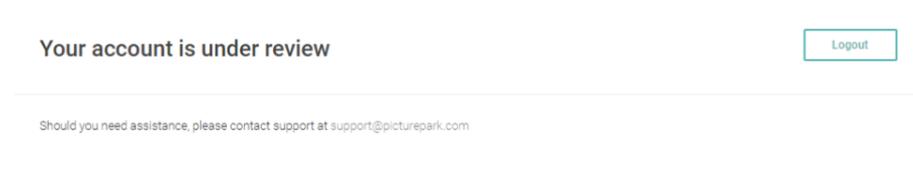

1.2 Login

If you successfully registered you can now try to log in on the start page. Depending on what login methods are configured on your Picturepark instance and what login method is defined for your user account, you can either log in via the normal login or via SSO.
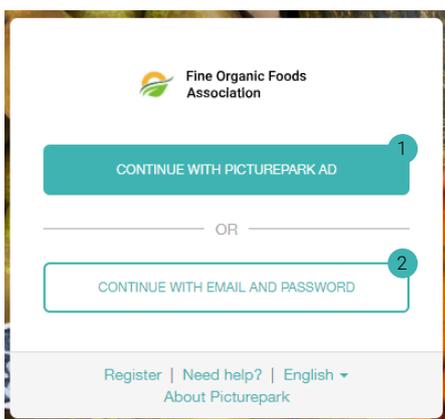
1. Login via Single Sign-On

2. Login via Picturepark IDS login (with email and password)

If you encounter the following error message when logging in, the selected login method is not configured for your account and therefore you have to log in via the other login method.
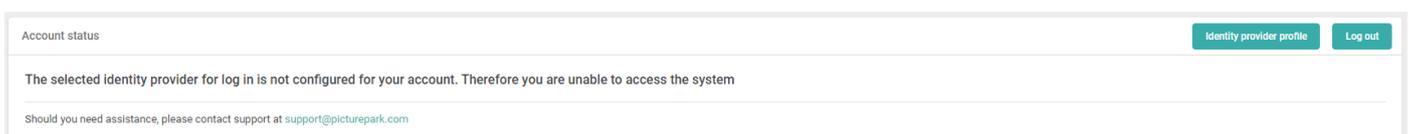
1.3 Reset password

To reset your password, follow these steps below.

- Open the Picturepark URL
- Select "need help?"
- Enter your email adress
- Submit

You should now receive an email with a link to reset your password. If you did not confirm your email adress in the first place, an email confirmation mail instead of a reset password mail will be sent.

1.4 Manage profile

As soon as you are logged in you can click on your avatar image on the bottom left of your screen to access your profile. You have the following options when entering your profile settings.
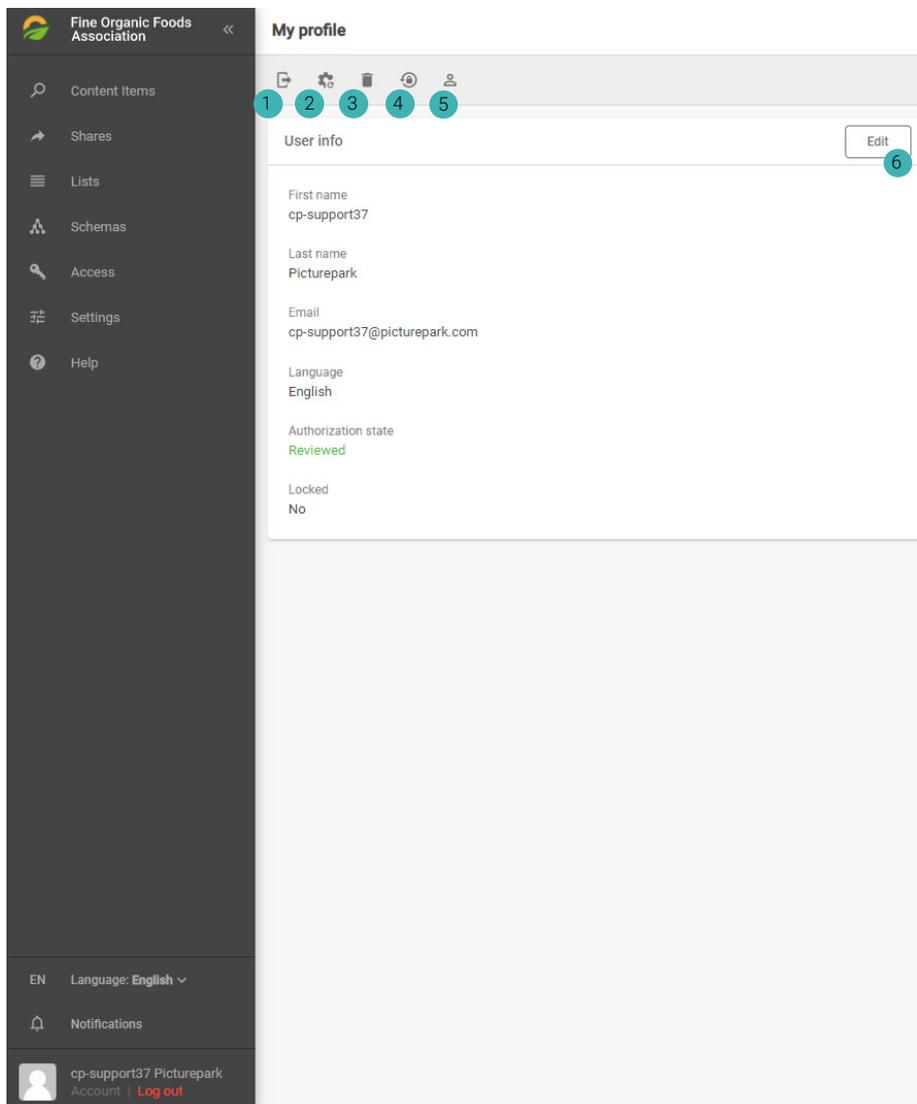

1. Log out
2. Reset user settings
3. Request deletion
4. Change password. This is only possible if your user account is set to Picturepark IDS.
6. Identity provider profile
5. Edit user information

2 First look

2.1 Content Browser

The content browser is the overview of all content items and is the first thing you see when logging in. You should be able to see the preview images of the files. Depending on the configuration, you should also be able to see some additional information on the file thumbnails, for example what file type a content item has or what permission set it has assigned. The frequently used features are highlighted and explained below.
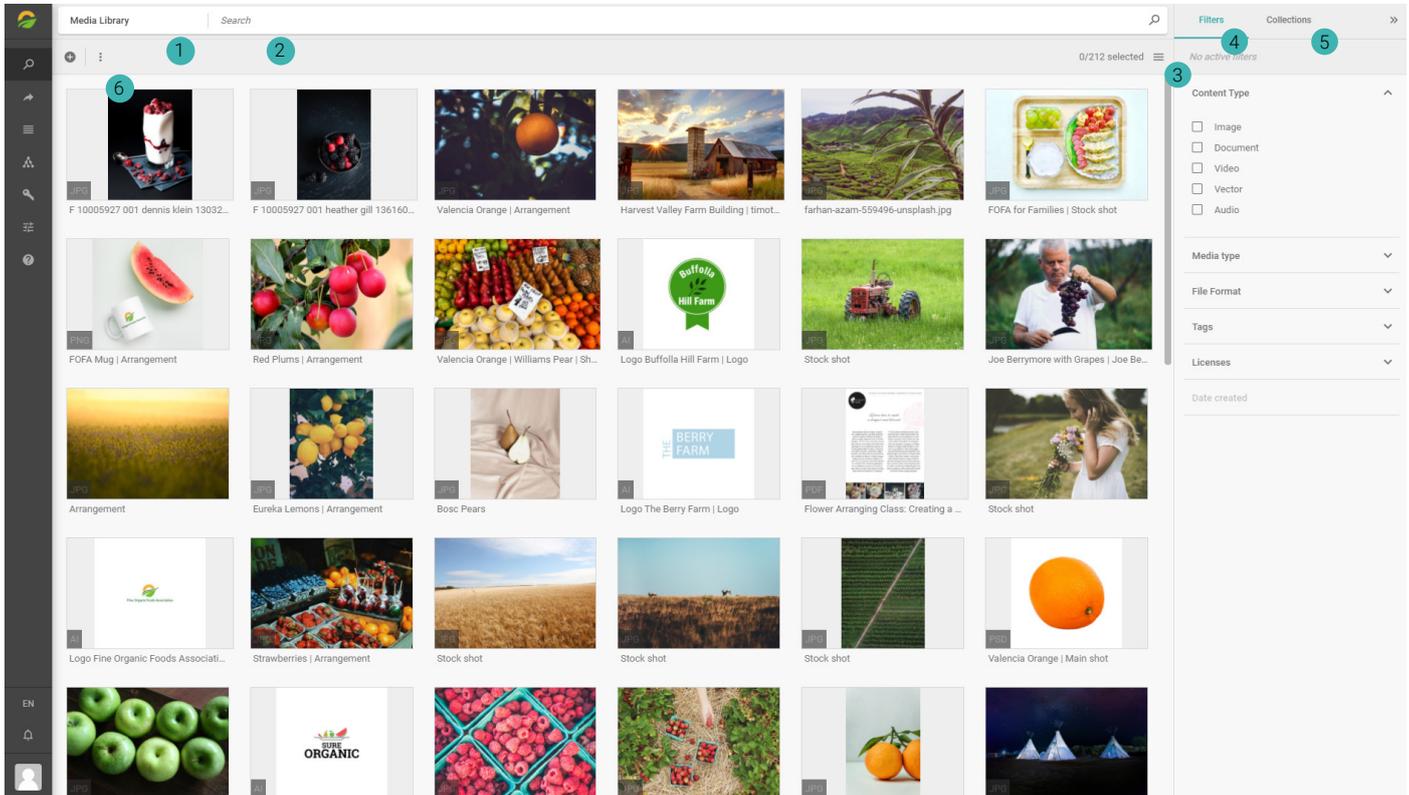
① **Channel**
Channels filter for specific content items. You can switch between them by expanding this menu. What the channels actually filter for depends on the customer configuration.

② **Search**
In the Picturepark search you can search for content. What metadata fields (e.g. title or description) are relevant when searching for content can be defined elsewhere.

③ **Sorting**
By expanding the menu you can change the sort order and the view of the content items.

④ **Filters**
You can filter for content by using the content browser filters.

⑤ **Collections**
Collections are groups of content items that have been collected by a user and saved for further refinement, sharing or editing.

⑥ **More options**
With this option you can export, embed, download, delete, share or export all or the selected content at once.

The options to download, share, add to your collection, embed, export, edit, delete or access the statistics of a content item are also displayed when right clicking on a content item or when selecting an asset, these options are displayed on top.

2.2 Menu

The menu can be expanded by clicking on the logo on the top left. What menu item leads to which configurations and settings is declared below.
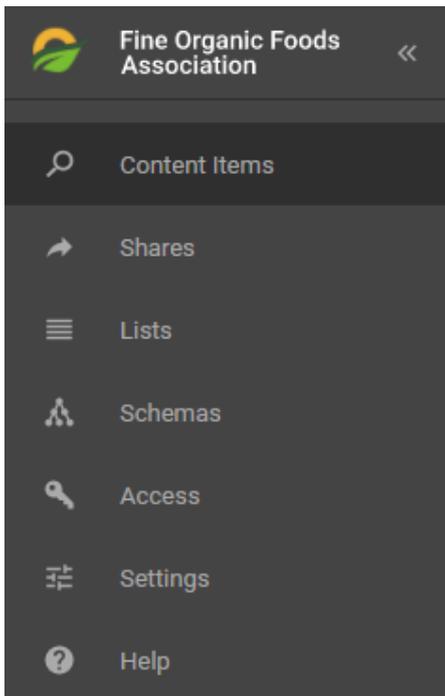
Content Items
You can switch to the content browser by clicking on the loupe.

Shares
A share is a group of content items that can be shared with people outside your company. You do not need access to Picturepark to access a share.

Lists
You are able to edit, delete, update and create new list items in this menu.

Schemas
A schema is a group of fields that stores different data. This includes lists, layers, file types, virtual items and fieldsets.

Access
In the access area you can manage users, roles and permission sets.

Settings
In the settings tab you can customize configurations and automations (e.g. business rules or XMP mappings), as well as channel settings and templates.

Help
The help section offers additional information about the system, Picturepark, terms & subscriptions, third party licenses & credits and help & support resources.

2.3 Channels

Channels filter for specific content items. You can adjust the sort order and name of the channels in the settings. The content browser filters and displayed content items can be adjusted per channel.

2.4 Sorting

The search results can be sorted by a defined value. This value can be defined in the channel settings. We always recommend to sort by relevance to get the most accurate search results.
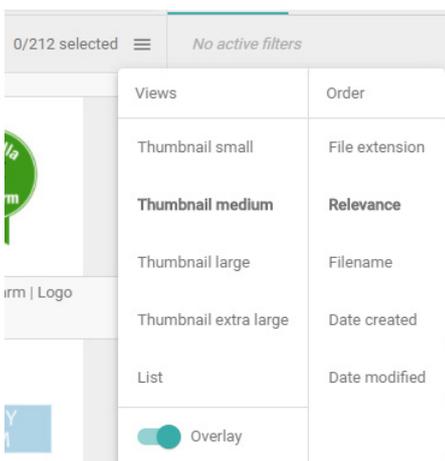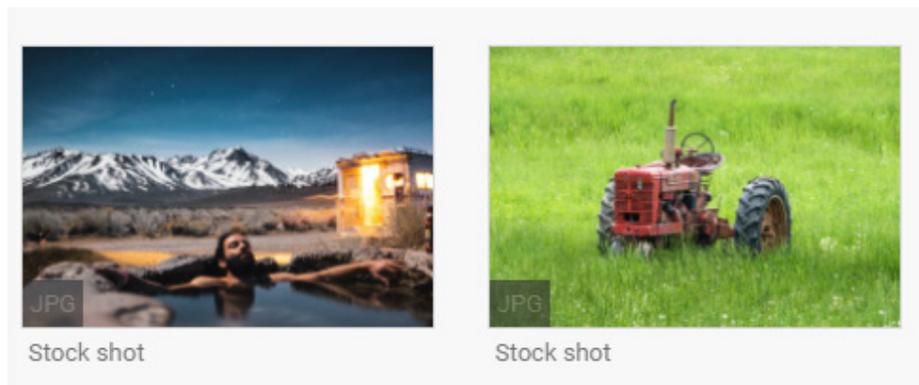
2.5 Search

The Picturepark search offers 3 search modes. When to use which search mode is explained below.

AND search

The AND search finds content that contains all search terms entered. For example, if you search for "Stock shot" the Picturepark translates it to Stock AND shot and searches for images that contain these two values.

OR search

When using the OR search the Picturepark search translates the search term "Stock shot" into "Stock OR Shot and finds content that contains one or more search terms entered.
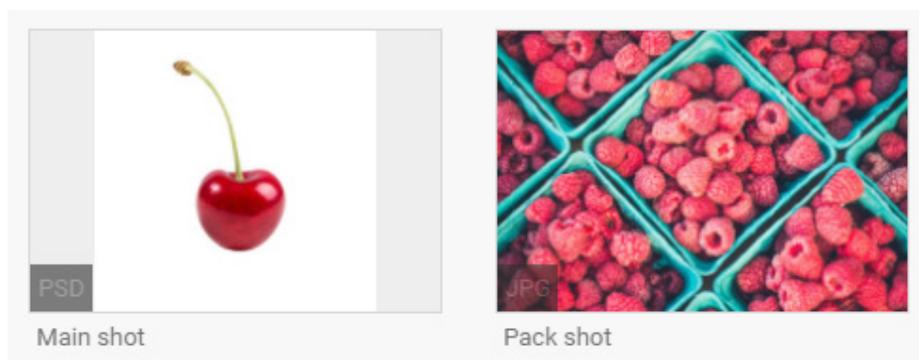
Advanced search

The advanced search allows a variety of exact, fuzzy or replacement searches. You can access the advanced search cheat sheet with search examples by clicking here.

2.6 Filter

Filters can be used to filter for content. You can create filters for tagboxes, number fields or date fields. Please keep in mind that it is not possible to add filters for text fields and that filters for date fields can only be displayed in defined date ranges.

To get the most accurate results, we recommend you to combine filters with the Picturepark search. If you want to search for "Stock shot", but you only want to get files with the file type video, you can additionally

3 Asset management

3.1 Detail view

The detail view contains all relevant information, permissions and metadata of a file. When accessing the detail view of a file by double clicking the file or right clicking and selecting "Details" you can choose between 4 sections.
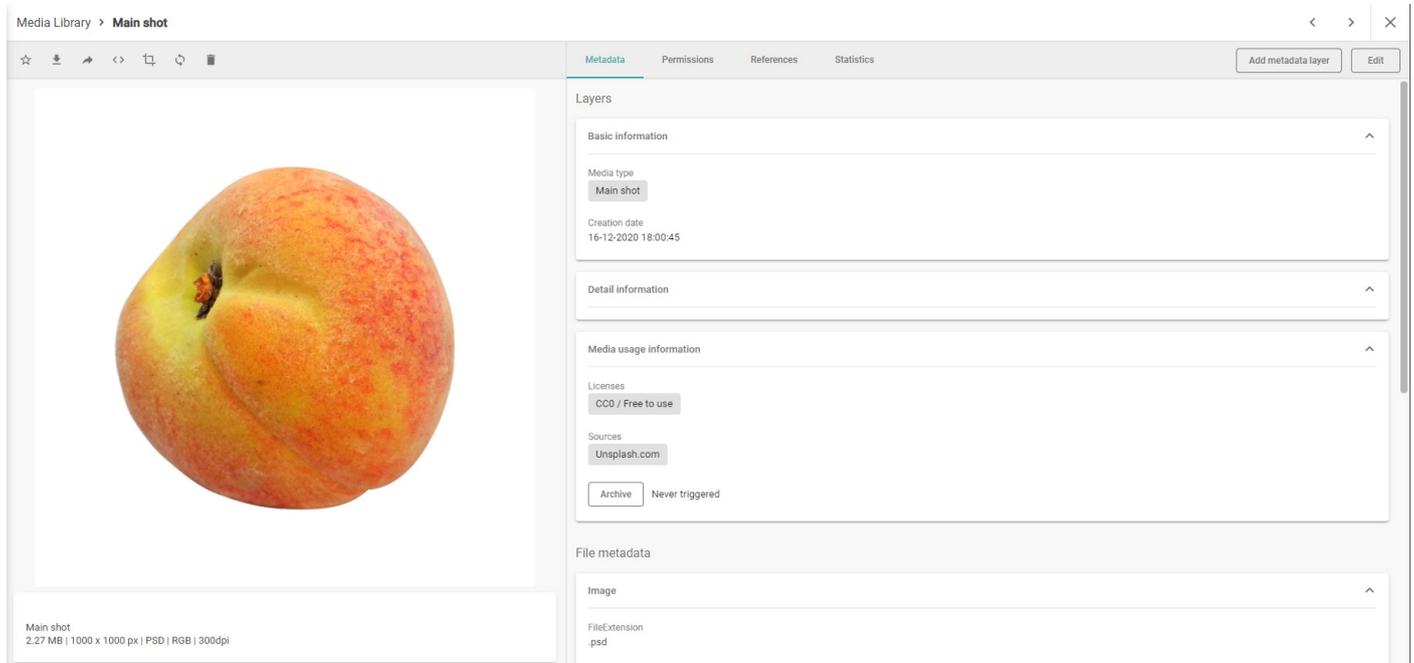
Metadata
In the Metadata area you can see all layers that have been added to this content item. Layers are constructs that contain the metadata fields and therefore provide further information about a file.

Permissions
When accessing the permissions tab, you can transfer the ownership, as well as add or remove permission sets. The assigned permission sets define, which user group can see/edit/delete this content item.
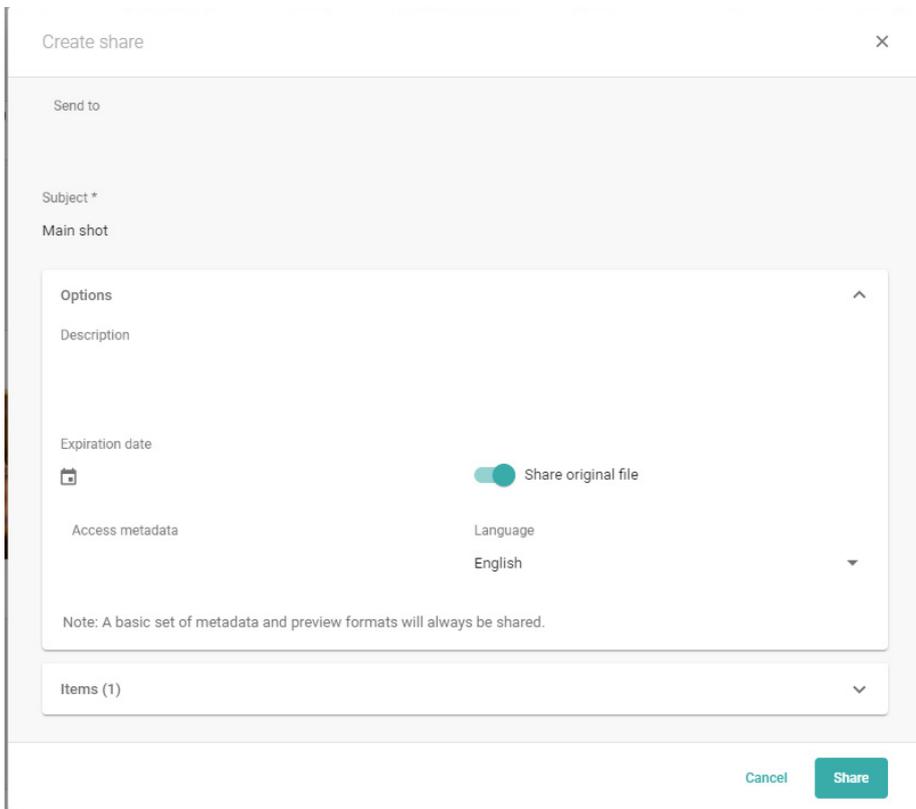
References
The reference tab either shows shares in which this content item is included or files that are referenced to this content item.

Statistics
In the statistics area you can see how many users downloaded, shared or embedded a file in the last 2, 7, 30 or 360 days.

3.2 Share

With the help of a share you can share content with external users. To access a sharing you don't need to have a user account on the Picturepark Content Platform. You can share content by right clicking on a content item and selecting "Share", but you can also select all relevant content items in the content browser and then select share. It is also possible to share a whole collection.

When creating a share, the screen above appears. If you don't want to send the share to somebody, you can leave the "Send to" field blank. You will still get the link.

3.3 Embed

You can create an embed by making a right click on a file and clicking "Embed". Once the embed has been created, click on "Manage". You should now get redirected to the following page.
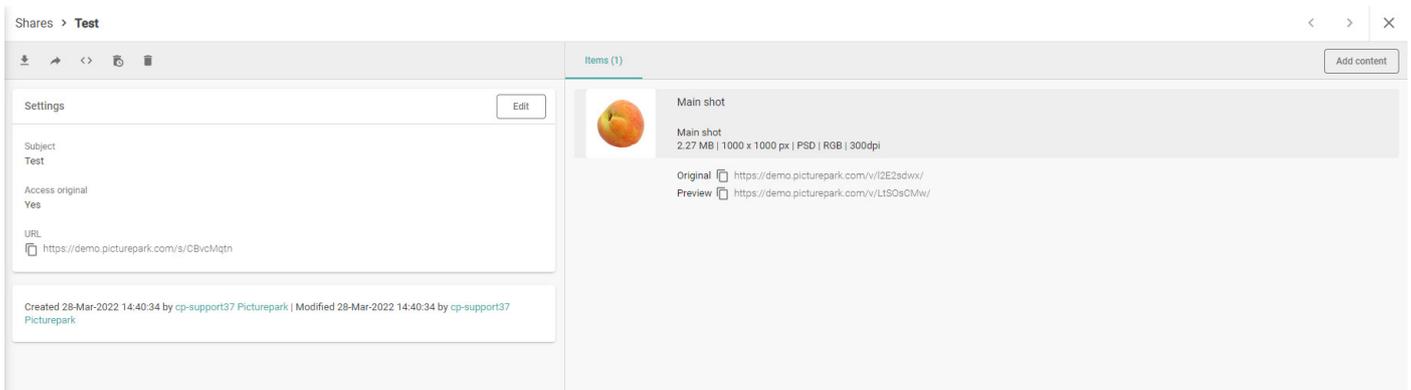
To adjust the image settings, you can now click on the content item on the right side. The Media Editor should then appear. You can now resize, crop or change the format of the image and then safe or share the image.
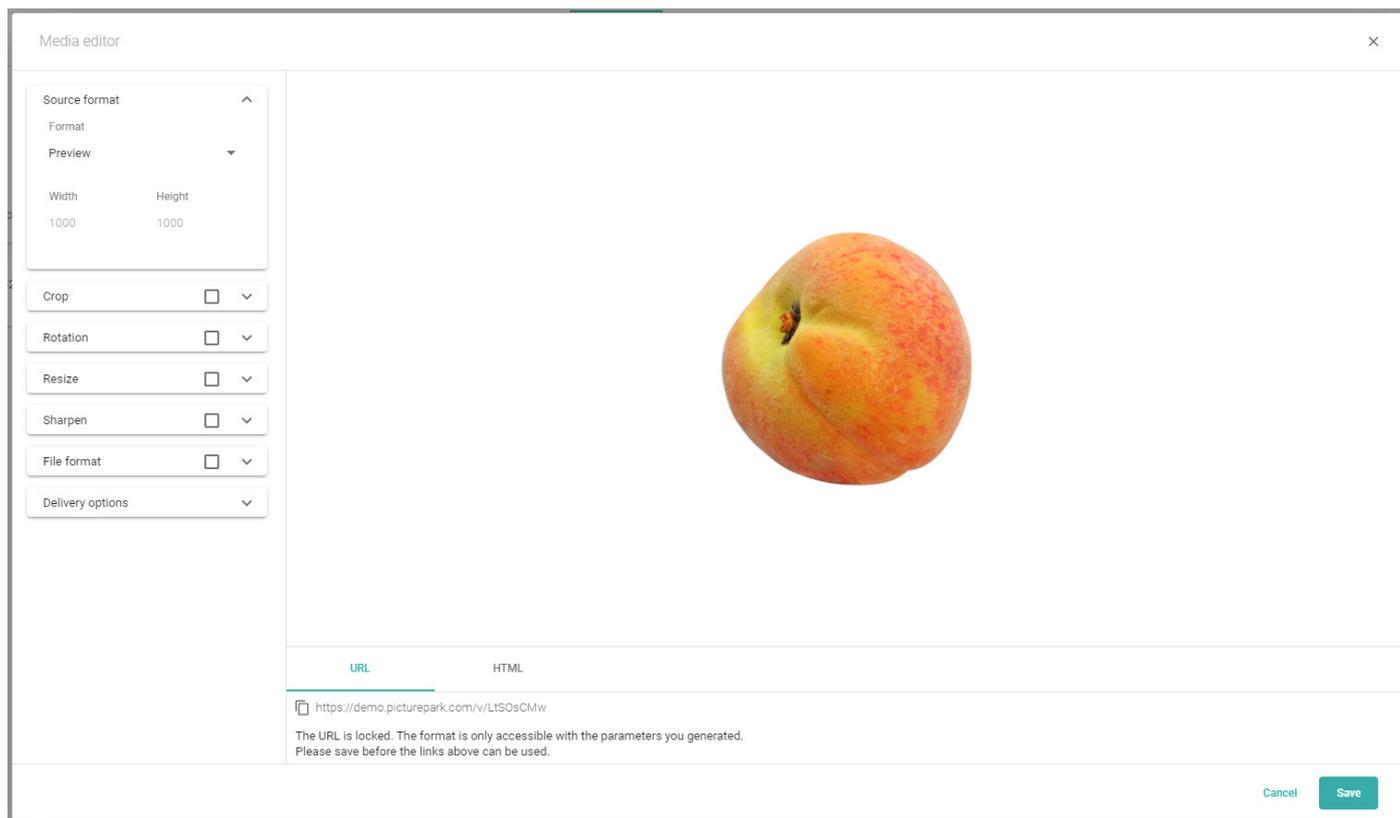
3.4 Collections

Collections are groups of content items that have been collected by a user and saved for further refinement, sharing or editing. You can create a collection by switching over to "Collection" in the top right and clicking on the plus sign. To add images to your newly created collection, you can click on the star sign in the top right of every file. This sign only gets diplayed if you hover over it.
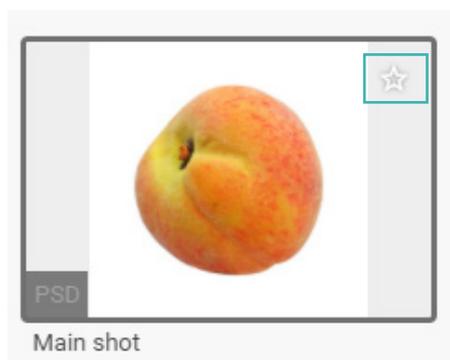
To further process the collection, take a look at all options on the next page.
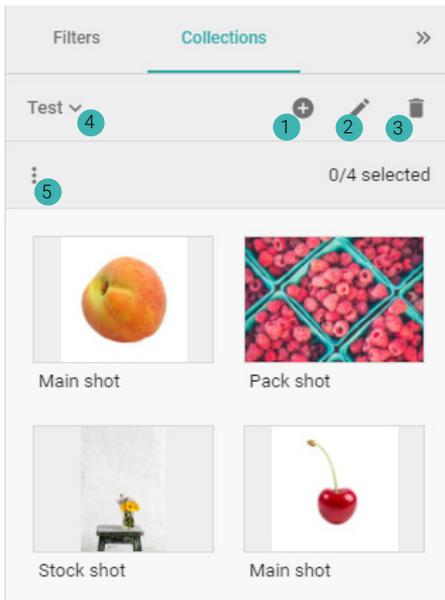
1. **Create new collection**

2. **Edit collection**

3. **Delete collection**

4. **Switch between collections**

5. **More options**
   You can download, share, embed or edit all content items of this collection. You could also clear the collection.

3.5 Download

If you have the necessary permission, you can download every content item from Picturepark to your local desktop. You can also download multiple content items at once by selecting them in the content browser or by downloading all content items of a share/collection.

When the formats get created via API, it must be defined on which format they are based on. If the format is based on the original, only users with the permissions to download the original file of a content item can download these created formats.

Picturepark distinguisches between static and dyamic output formats. The static output formats are pre-rendered and dynamic output formats are rendered on-demand. Both of these formats are available in the format selection dialog. If you also want to download the thumbnails, you have to click on "Show more formats".
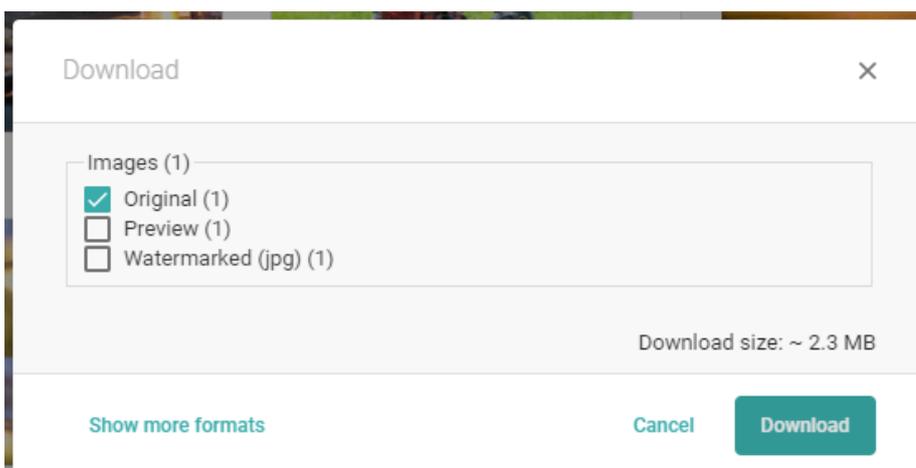
4 Advanced asset management

4.1 Upload

To upload content to the Content Platform, you can either click on the add-button on the top left of the content browser and select Upload file or Upload folder, or you could drag and drop your folder or file into the content browser.
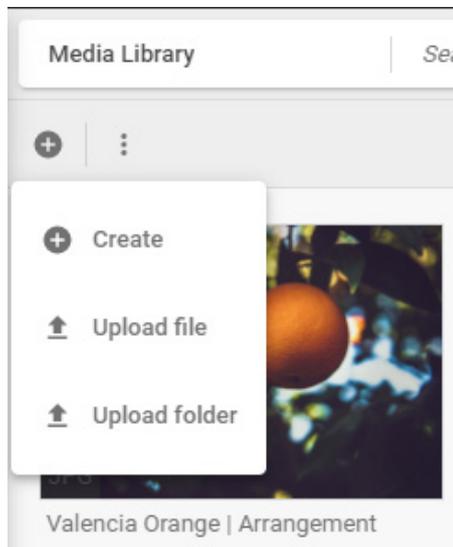
To create a virtual item, please click on "Create". A virtual item is a file-less content that adheres to a defined structure.

4.2 Editing options

After uploading a file, the following window pops up. You could now either press on "Add metadata Layers" to edit the uploaded files directly or you could edit this content later. To find the most recent uploaded content on top of the content browser, you could change the sort order to creation date descending.
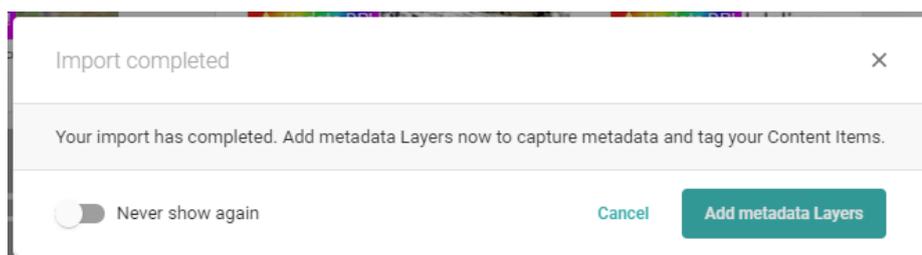
Single edit

To edit single content items, you can open the detail view by double-clicking on a content item in the content browser or by right-clicking and selecting "Details". You could also select a content item and then press the edit-button on top of the content browser.
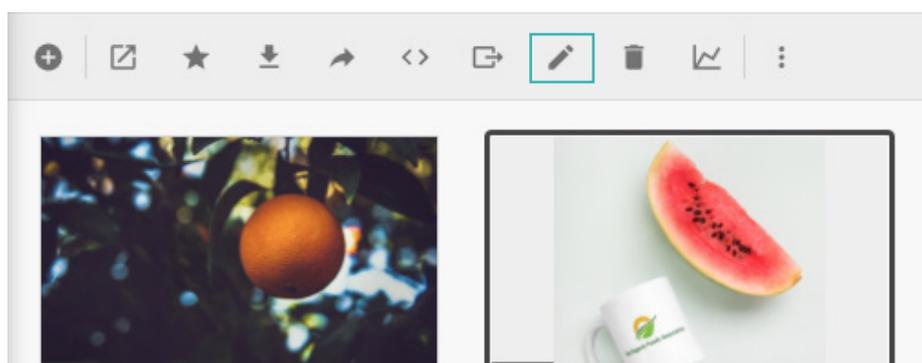
As soon as you open the detail view of an asset, you can click on edit in the top right to switch to the edit mode. If you pressed on "Edit" and not on "Details" to open this view, the openend content item is already in the edit mode.
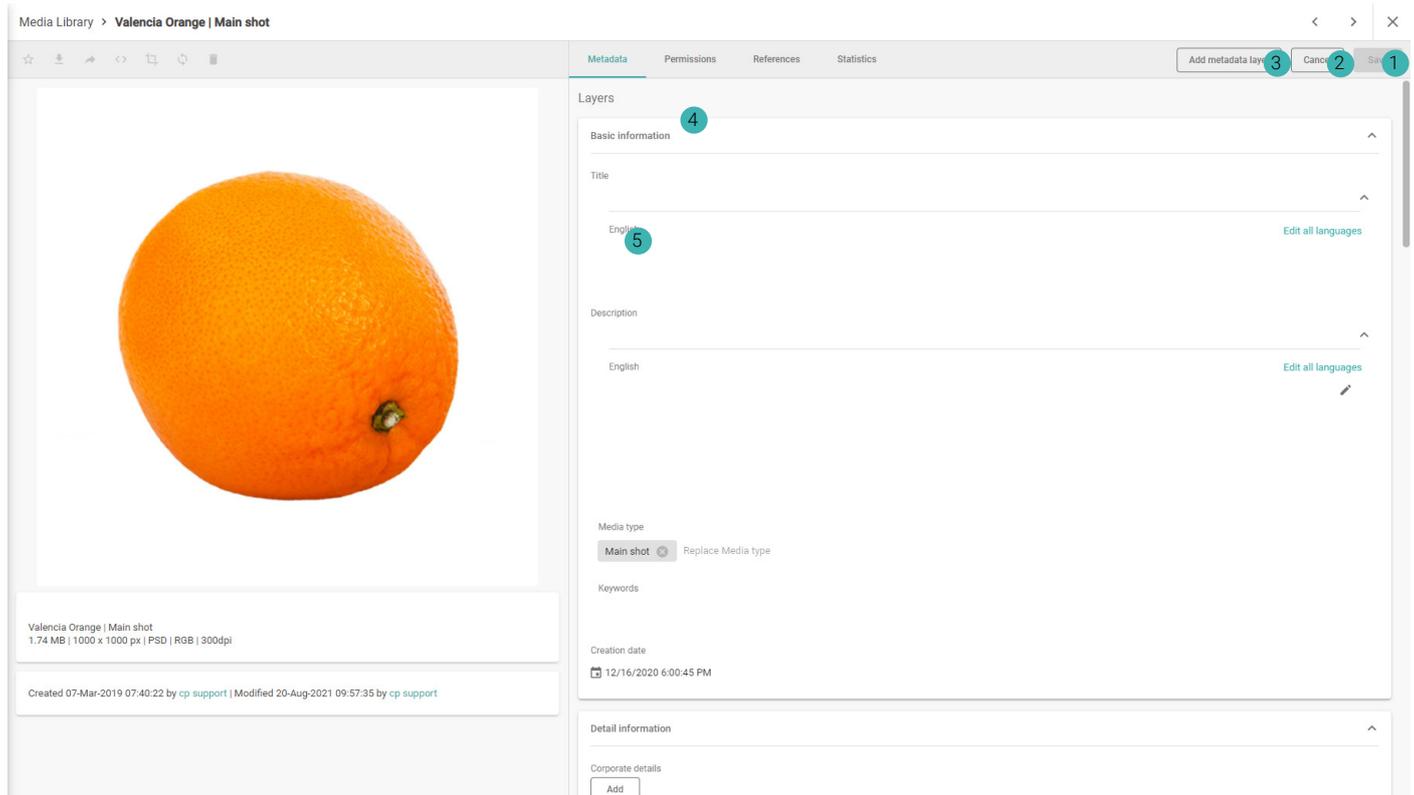
1 **Save**
Save your changes.

2 **Cancel**
Cancel and discard your changes.

3 **Add metadata layer**
Add new layers to this content item. Layers are schemas that inherit fields.

4 **Layers**
These sections are called layers. You can expand and diminish the layers by clicking on the respective name (e.g. "Basic Information").

5 **Fields**
The fields of the layers save metadata values and can be edited in this view. There are multiple types of fields, for example tagboxes, date or number fields. If the field is a tagbox field, you can tag the list items of the connected list here.

Batch editor

To edit multiple content items, you can select multiple content items in the content browser and press on edit when right-clicking. If there are no content items selected, you can edit all displayed content items by clicking on the 3 dots on top of the content browser and selecting "Edit()". How many content items you would edit is display in the brackets.

When opening the batch editor and none of the content items displayed on the left is selected, you are editing all content items at once. As soon as you select one of them, you only edit this one. What all the options are is displayed and explained in the screenshot below.

① **Add metadata layer**

② **Layers**

③ **Fields**

④ **Remove layer**

⑤ **Hide content with layer**

⑥ **Filter for content with layer**

⑦ **Save**

⑧ **Cancel**

When you double-click on a tagbox field, you have the following options. If this would be a text field, you could simply enter your text in the field.
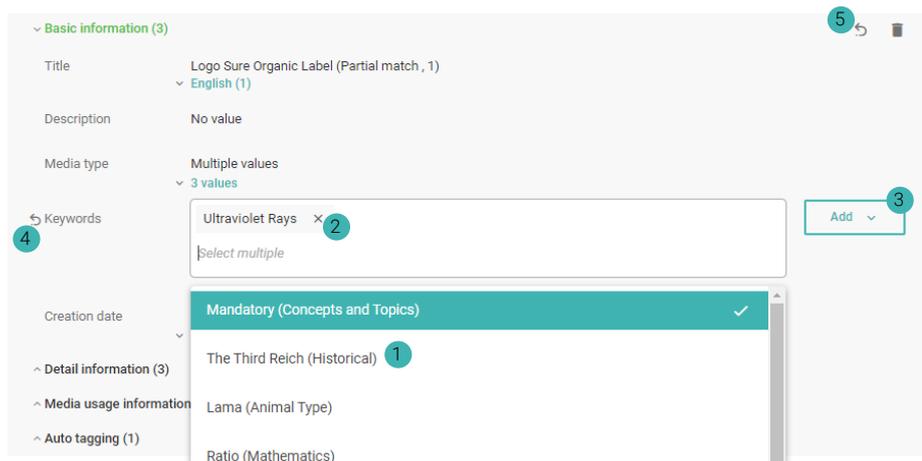
① Add list items

In this example, the field "Keywords" is a tagbox field and therefore linked with a list. If you click in the text area field, you can search for values and add them by clicking on them.

② Remove list item

By clicking this icon, you remove this specific value, that has been added.

③ Batch action modes

There are the 3 following modes with different usage purposes.

- Add: Adds new list items. The existing values remain unchanged
- Overwrite: Overwrites values with the new input. The existing values are removed.
- Remove: Removes specific input.

④ Undo edit

⑤ Undo edit

4.3 Publish content items

After uploading, adding metadata and reviewing a file, you may want to publish the file, so read-only users are also able to view this content item. You can do that by opening the detail view of a content item or opening the batch edit and switching to the tab "Permissions".

To publish a content item, you could now click on "Add" in the top right and then select the corresponding permission set. Permission sets are templates of permissions that determine which user role can view, access, download, edit, delete and manage a content item. How the permission sets are named depends on the configuration. The permission set to publish content items is usually named "Approved".

4.4 Permissions

Permissions sets control the level of access a user role has on content or schemas. These permissions sets can be assigned to lists, layers or content and are additive.

The content and schema permission sets can be changed in the menu under "Access". To change a permission set, you can double-click on one and open the detail view. Once the detail view of a permission set has opened, you can scroll down to the section "Role Permissions". This is the most important part and what we focus on in this user guide. If you want more details regarding the permissions, please visit the Admin manual by clicking here.

In the section "Role Permissions" you can define which user group has which type of access. If you want to add new user roles to this permissions, follow these steps below.

1. Click on "Add" on the top right of this section.
2. Click on your desired user role.
3. Now select the type of access this user group should have. The default permission is "View". Please keep in mind that if you select one of these permissions, all the permissions above are also granted. For example, if you would choose the permission "Edit content", "View", "Access original" and "Edit metadata" are also applied.
4. Click "Assign". The changes are saved automaticially.

4.5 Content item owners

The user who uploads or creates a schema or content item is automatically the owner of that item and has the permission to view, manage, edit and change the permission of that schema/content item.

The ownership can be transferred by the owner or any other editor/admin with the permission to manage the permissions. The ownership can be transferred in the detail view of any schema or content item.
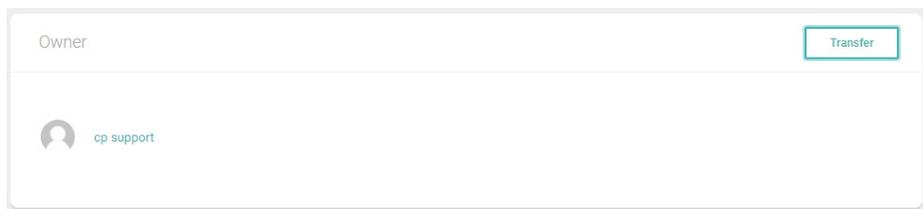
5 User management

5.1 Approve user

When a user registers and has confirmed his email address, an administrator has to review and approve the user. If a user does not get reviewed, he is not able to access the Content Platform.

To set a user as reviewed, you have to navigate to the menu "Access" and then to "Users". In the users tab, you can now filter for the authorization state "To be reviewed". This will filter for all users who have to get reviewed. To review a user, please follow these steps below.

1. Open the detail view of a user by double-clicking on a user.
2. Click on the check mark icon on the top to set the user as reviewed.
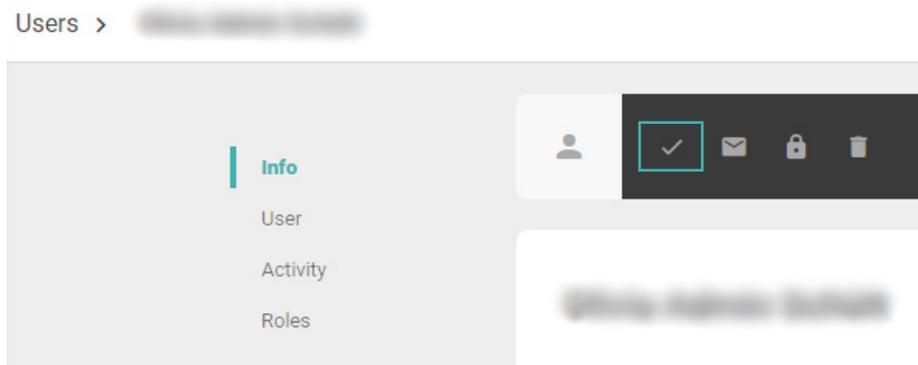
5.2 Apply user role

To apply a user role, you have to access the detail view of a user and then scroll down to the section "Roles" You can add user roles by using the "Add role" button. If a user logs in via SSO and a fallback user role or group mapping is defined, the user will get this user role assigned. This can be defined in the settings. To read more about this topic, please visit the [Admin manual](#).
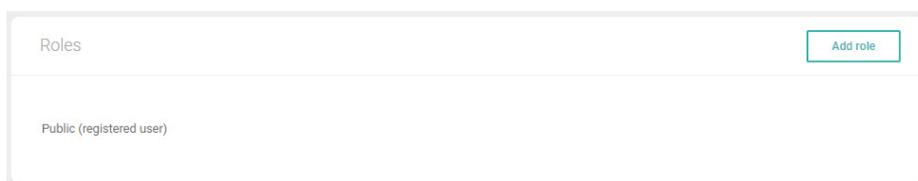
5.3 Edit user role

Editing user roles can be done in the same menu in the "Roles" tab. To open the detail view and edit a user role, you can double-click on one. The most important part of this detail view is the section "User Rights". Here you can edit all permissions. All available permissions are displayed below.

User Rights

⌃ **All permissions** (16/25)   Select all   ✎

- Manage content
- Manage sharings
- Manage transfer
- Manage channels
- Manage metadata schemas
- Manage users
- Manage user roles
- Manage permissions
- Manage search indexes
- Manage list items
  - Manage service providers
- Manage embeds
- Manage templates
- Manage terms of service
  - Manage live stream
  - Manage document history
- Manage all sharings
  - Manage output formats
  - Create external business processes
  - Create and configure identity providers
  - Manage XMP mappings
- Read statistics
  - Write statistics
- Export statistics
  - Edit images

5.4 Identity Provider

The default identity provider of Picturepark is Picturepark IDS, but it is possible to add and connect an OpenID Provider, for example ADFS. If there are other identity providers set up, you can choose to log in via another identity provider on the start page. How to create, update and delete identity providers is further explained in the Admin Manual.

6 Basic configurations/Admin work

6.1 XMP Mappings

XMP mappings allow to extract data from the XMP/EXIF and then import it into a Picturepark field. It also allows to export data from Picturepark fields into the XMP data.

To create an XMP mapping, you have to navigate to the settings and select "XMP Mappings". In this area, you can click on "Add" to create a new mapping. What must be considered when creating an XMP mapping is explained below.
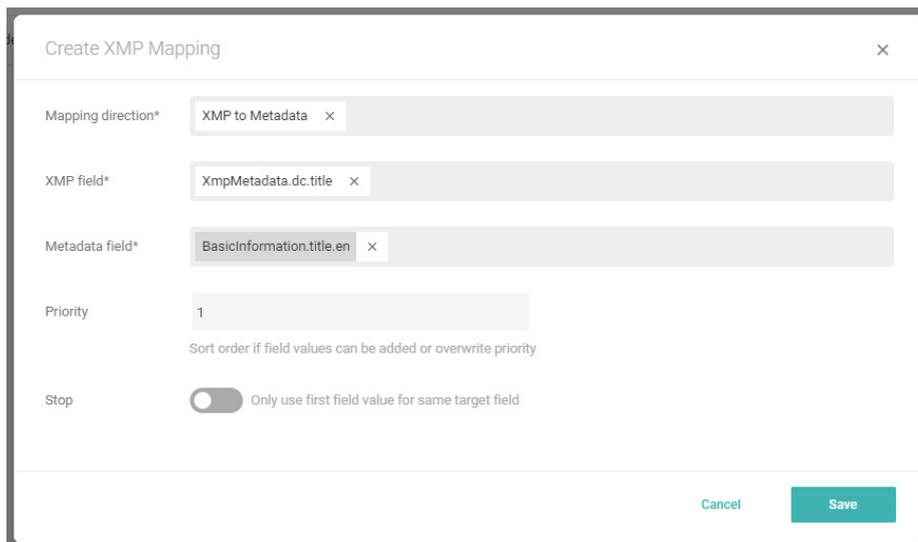
Mapping direction*
Here you can choose in which direction the data should get exported/imported. The following options are available: XMP to metadata, Metadata to XMP, Both.

XMP field*
Choose the relevant XMP field .

Metadata field*
Choose the relevant metadata field. Please keep in mind to define the language (.en, .de), if the field is a translated field.

Priority
The priority defines in which order multiple values get written into the same field. The higher the number, the highter the priority.

Stop
The stop option of an XMP mapping is important, if there are multiple XMP mappings that import data into the same metadata field. The mapping stops if the first XMP mapping import was successful.

6.2 Content browser filters

To add new content browser filters, the fields that you want to add as a filter have to be included in the filter first. This has to be done in the layer settings. To include the desired field into the filters, follow the instructions below.

1. Open the detail view of the corresponding layer. (Schemas/Layers/...).
2. Scroll down to "Fields".
3. Now click on "Edit field" next to your field.

| Keywords (keywords) | Tagbox (Controlled Vocabulary) , Search and index: ON | ✏ 🗑 |

4. The following window should now appear. Please navigate to "Search behavior" and tick the checkbox under "Include in filters" for the desired field (Usually "name").

Edit Field ✕

Name *

English *   Keywords

+ Add

ID *   keywords

GENERAL   DEFAULT VALUES   **SEARCH BEHAVIOR**

Field	Include in filters	Include in search	Boost
Name display value (_displayValues.name)	☐		
name	☑	☑	1
⊞ broader	☑	☑	
⊞ classification	☑	☑	
⊞ state	☐	☐	
description (Location, CustomKeyword)	☐	☑	1
zipCode (Location)	☐	☐	1

Cancel   Save

5. Now save the changes and reindex your search indices in the settings under "Status".

After you have successfully added the desired field into the filters, you can now navigate to the settings and then click on "Channel". Now follow the instructions below.

1. Double-click on a channel.
2. Navigate to the section "Content browser filters".
3. Click on "Add".
4. Search for the field you have just included into the filters. The name is structured like this: **LayerID**.**FieldID**. **FieldID of the list** (e.g. basicinformation.keywords.name).
5. Click on the correct name.
6. Change the name of the filter.
7. Press "Save".

6.3 Channel filters

Channel filters can be found in the settings under "Channels" when double-clicking a channel. If you scroll down you should be able to detect the section "Channel filter".

The channel filter supports multiple types of filters. All types of filters are explained in the [Admin manual](#). This user guide focuses on the "And", "Or" and "Not" filter.

And filter

The "And filter" filters for content that matches all search queries defined.

Use case: You want a channel that only displays product images.

```
Filter: {
        "kind": "AndFilter",
        "filters": [
                        {
                                "kind": "TermFilter",
                                "field": "layerSchemaIds",
                                "term": "Productlayer ID (e.g. ProductDetails)"
                        },
                        {
                                "kind": "TermFilter",
                                "field": "contentSchemaIds",
                                "term": "ImageMetadata"
                        }
                ]
        }
```

Or filter

The "Or filter" filters for content that matches one of the search queries defined.

Use case: You want a channel that only displays content items with the product layer or basic Information layer assigned .

```
Filter: {
        "kind": "OrFilter",
        "filters": [
                        {
                                "kind": "TermFilter",
                                "field": "layerSchemaIds",
                                "term": "Productlayer ID (e.g. ProductDetails)"
                        },
                        {
                                "kind": "TermFilter",
                                "field": "layerSchemaIds",
                                "term": "Basic information layer ID (e.g. BasicInformation)"
                        }
                ]
        }
```

Not filter

The "Not filter" filters for content that matches none of the search queries defined.

Use case: You want a channel that does not display content items with the product layer assigned.

```
Filter: {
        "kind": "NotFilter",
        "filter": {
                "kind": "TermFilter",
                "field": "layerSchemaIds",
                "term": "Productlayer ID (e.g. ProductDetails)"
        }
}
```

6.4 Lists

Picturepark lists are lists of tags or values. These lists are linked to layers via tagbox fields. The main benefit of lists is that you are able to make lists with multiple rows, so you could store more information behind one tag. Another benefit is that they are tagged via their ID, so if you want to change the name or any other information of a list item, you can do that without changing the tagging of the content items.

To create a new list item, follow the instructions below.

1. Navigate to "Lists".
2. Click on the list where you want to create a new list item.
3. Press on the plus button or hit Ctrl + I on your keyboard
4. Enter the necessary information and click on "Save"

If you click on a list item, there are more options like deleting, editing or exporting the list item displayed on top. These options are also accessible by right-clicking a list item.

6.5 Updating your lists

Export

To update your lists, you can navigate to "Lists" again and click on the list you want to update. Then click on the 3 dots and select "Export". You can then choose which fields you want to export.
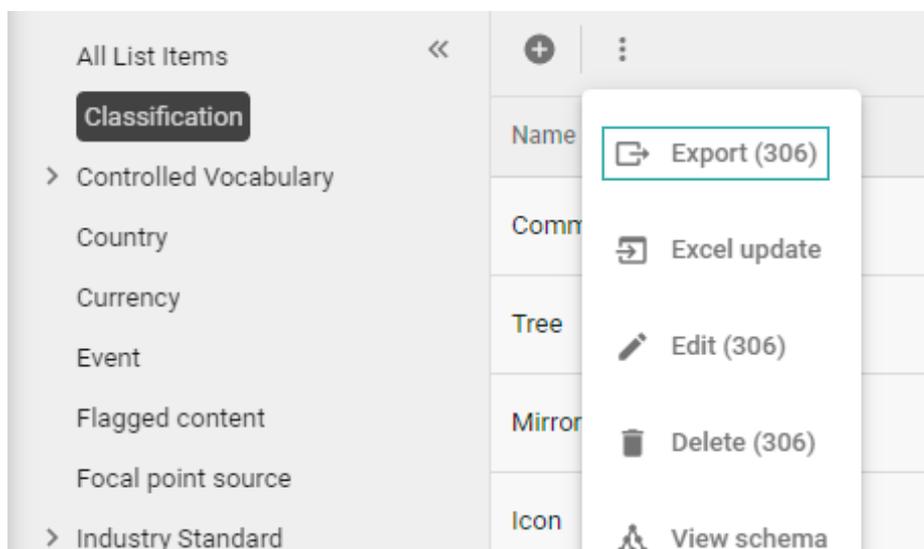
The excel export should then contain all fields, including the Picturepark ID.

Update

The existing values of this list all have a Picturepark ID assigned and are mapped based on this ID. Therefore, you can change all other fields and if you later import this list, as long as the Picturepark ID remains unchanged, the list items are mapped correctly.

If you want to add new values, you can simply insert them here. The Picturepark ID field has to remain empty. The ID will get created automaticially when the list items get imported.

Import

If you are done updating you list items in the excel file, you can navigate back to the Content Platform. Now click on the same 3 dots and choose "Excel update". You can now choose your file and map the columns manually. If the columns are mapped correctly, you can further follow the instructions and update your list items.

6.6 Metadata export/import

Export

To export content items, you could either select the desired content items in the content browser, right-clicking and selecting "Export", or you could click on the 3 dots on top of the content browser and export all displayed content items.
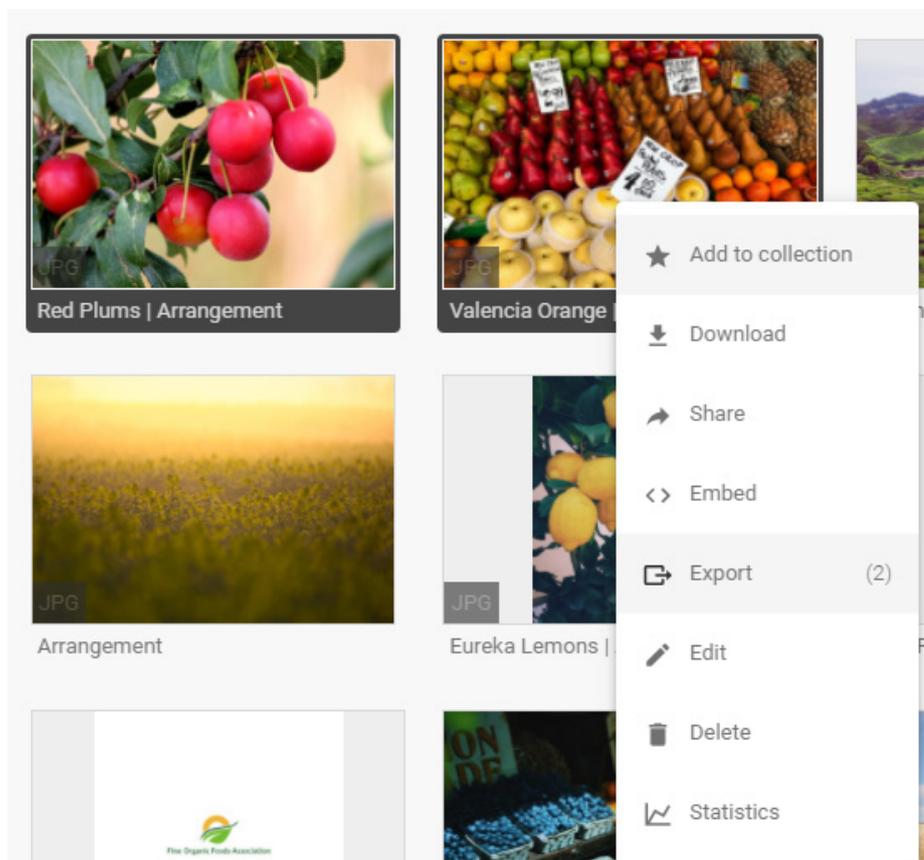
When exporting the metadata, you can choose which fields you want to export. If you want to export tagbox fields, we recommend to only export the name and leave the rest of the metadata. This will make it easier for you when updating the excel file. You can then just enter the name of the value in this field and don't have to worry about the other information, as this will then get mapped automaticially.

Update

Similar to the list item update, the content items all have a Picturepark ID assigned and are mapped based on this ID. Therefore, you can change all other field values except the Picturepark ID. As long as the Picturepark ID remains unchanged, the content items are mapped correctly.

Please keep in mind that if you want to insert multiple values into one field, the values have to get separated with an "|". This also needs to be done if there is already a value in a field and you want to add another value to this field. If you replace the old value with the new one in excel, the old value will get overwritten when importing the metadata.

Import

As soon as you are done updating the metadata of your content items in the excel file, you can navigate back to the Content Platform. Now click on the 3 dots in the content browser and click on "Excel update". You can choose your file and check if the columns are all mapped correctly. Now proceed with the instructions and update your content items.

6.7 Clean duplicates

To clean your duplicates, please navigate to the channel "Admin" or "Administration" . In this channel, there should be a filter called "Duplicates (Hash)". If there is no such filter, you could either try to add this filter by yourself or contact support@picturepark.com.

If you expand this filter, you should be able see the sha1hash codes of all files stored in your Picturepark. The sha1hash code is a cryptographic function and can be referred as a signature that gets assigned to a file. If there are multiple files with the same sha1hash code, these are duplicates and can get cleaned.

If a Sha1Hash code is used multiple times or not can be identified when hovering over a code in the filter. The Sha1Hash code which is used by the most files is displayed on top of this filter.
If the first sha1Hash code is only used once, there are no duplicates in your system and therefore no data cleaning is necessary.

Duplicates (Hash)	⌃
🔍 Search	
☐ 96F6129387360002D78CC25D858...	2
☐ 00790625E6AEABE8CB18F65DF4954...	
☐ 00945717BB33F9A3BE2350D7E103F...	
☐ 03BD84AAD5954D2015A748A21F82...	
☐ 04777F59A0B2CAC20889810FB1C1...	
☐ 0492255348703C25B59304F359F55...	
☐ 04E7EF4F916AF3CB9F2B4E11ABC4...	
☐ 0784166663F2DFCDE92E14710D8A...	
☐ 08F093BD81EB241C3DB767B31E50...	
☐ 091C3730856F3B7155B9CD4E5F602...	
Show more	