Dynamic Workflow Solutions

Hybrid 4.0 Admin Guide

FLEXIBLE & FUNCTIONAL

Hybrid has proven to be a highly flexible and functional platform that scales to the needs of your business.

INTELLIGENT WORKFLOWS

Hybrid lives at the heart of your operations, supporting users with intelligent workflows within an integrated ecosystem.

STORE & SCALE

Hybrid can be deployed in SaaS, private cloud, or on-premise environments providing scalable and secure storage solutions that meet your unique business requirements.

CONFIDENCE & SECURITY

Hybrid delivers the confidence that your assets are secure and used responsibly, with the transparency you demand to deliver operational insights.

TARGET & TAILOR

Hybrid's customizable UI allows you to create user-driven interfaces and experiences for groups, teams and individuals.

PLUG-IN & PERFORM

The interoperability with category-leading technologies help to ensure that **Hybrid** is future-proof - delivering value for your organization today and tomorrow.

COST EFFECTIVE

Hybrid produces a positive economic impact by generating operational efficiencies at a low total cost of ownership.

Last Updated: 01/25/2023

TABLE OF CONTENTS

What is **Hybrid**? 14

Hybrid Administration 15

Admin360 15

Manage Assets 15

View Trashed Assets 15

View Assets Missing Original File 15

View Duplicate Assets 16

CSV Metadata Updater 16

Manage Requests 16

Request Management Options 16

Requested By 16

Date 16

Comments 16

Requested Items 17

Assigned To Team Member 17

Status 17

Reason for declining 17

Expires 17

Reason for approving
An area to explain why the request was allowed. 17

Manage Dash Tiles 17

Dash Tile Management Options 18

Preview 18

Title 18

Text 18

Size 18

Display Title 18

Display Icon 18

Visible to 18

Manage Slideshow 18

Creating a Slideshow Image 19

Additional Slideshow Options 19

Move Up 19

Move down 19

Delete 19

Randomize Single Static Image 19

Manage External Shares 19

External Share Management Options 20
Access 20
Expires 20
Share using permissions from user group 20
Share Password 20
Request Feedback 20
API Test 20
add/alternative/file 20
add/asset/nodes 20
add/asset/nodes/multi 21
add/asset/to/collection 21
asset/log/last/rows 21
copy/asset 21
create/asset 21
create/collection 21
delete/alternative/file 21
delete/asset 21
delete/collection 21
do/search 21
download/file 21
get/alternative/file 22
get/asset/data 22
get/asset/field/data 22
get/asset/log 22
get/asset/path 22
get/asset/type/extensions 22
get/asset/type 22
get/field/options 22
get/related/assets 22
get/source/structure 22
get/sources 22
get/user/collections 23
login 23
remove/asset/from/collection 23
search/get/previews 23
search/public/collections 23
set/node 23
system/check 23
update/asset/type 23

upload 23
upload/file 23
upload/file/by/url 24
upload/file/to/source 24
Analytics 24
Creating an Analytics Report 24
Additional Analytics Options 25
Activity 25
Group 25
Asset Type 25
Period 25
Collection 25
External Shares 25
Graph Types 26
Reports 26
Receive Regularly via Email 26
Send Bulk Mail 27
Bulk Mail Options 27
Send To 27
Type 27
Email 27
Screen 28
Email and Screen 28
Enable HTML Support 28
Subject 28
Text 28
Send Bug Report 28
System Management 28
Users 28
Creating a New User 29
Advanced User Configuration Options 29
Account Expires 29
IP restriction 29
Search filter override 29
Comments 29
Groups 30
Understanding Default User Groups 31
Super Admin 31
Administrators 31

General Users 31
Creating a New User Group 31
Advanced Group Configuration 31
Reference 31
Name 32
Contains 32
Permissions Manager 32
Parent 32
Restrict Directory Access 32
Directory Whitelist 32
Directory Blacklist 32
Search, Edit & Derestrict Filters 32
Search Filter 32
Edit Filter 32
Derestrict Filter 33
Filter configuration 33
Filter Operation Options 33
Equals (=)(Equals Character) 33
Or (|)(Pipe character) 33
Not (!=)(Exclamation Mark and Equals Characters combined) 33
Using Multiple Fields in a Filter 33
Asset Defaults 34
Override Config Options 34
Email Welcome Message 34
IP Restriction 34
Request Mode 34
Group Logo 34
Permissions Manager 34
Searching & Access 35
Search Capability 35
Can download restricted assets and view confidential assets (normally admin only) 35
Can download expired assets 35
Can download unreleased assets 35
Block access to workflow state ‘<workflow_state>’ 36
When to Block Workflow States 35
Restrict access to all available assets 36
Can make asset requests 36
Show watermarked previews/thumbnails 36

Metadata Fields 36
Can see all fields 36
Can edit all fields (for editable assets) 36
Asset Types 36
Can see asset type ‘<type>’ 36
Restricted access only to asset type ‘<type>’ 37
Restricted upload for asset type ‘<type>’ 37
Edit access to asset type ‘<type>’ 37
Asset Creation & Management 37
Edit access to workflow state ‘<workflow_state>’ 38
Edit access to access state ‘<access_state>’ 38
Can create/upload files (admin users; assets go to the ‘Active’ state) 38
Can create/upload files (normal users; assets go to ‘Pending submission’ state via My Contributions) 38
Can delete assets (to which the user has write access) 38
Can manage archived assets 38
Can manage alternative files 38
Can tag assets using ‘speed tagging’ (if enabled in the configuration) 38
Can share assets 38
Prevent users from sharing assets with external users 38
Disable locking of editable assets (locking is used to prevent assets being edited by other users) 38
Can upload asset data via csv 38
Can edit metadata via csv 38
Collections 39
Enable the bottom collection bar (‘Lightbox’) 39
Can publish collections as spotlights 39
Can create upload links 39
My dash 39
Can see all spotlight categories 39
When searching, display only assets that exist within spotlights to which the user has access 39
Administration 39
Can access the ‘Admin360’ area 41
Can manage research requests 41
Can manage asset requests 41
Can assign asset requests to others 40
Can be assigned asset requests (also; can only see asset requests assigned to them in the Manage Asset Requests area) 40

Manage default dash / all user tiles (Requires ‘h’ permission) 40
Manage user group dash tiles 40
Can bulk-mail users 40
Can manage asset comments 40
Can access API test tool 40
Can manage all external shares 41
System Management 41
Can access the ‘System’ area 41
Can manage users 41
Can manage groups 41
Can manage asset types and asset type fields 41
Enables access to the asset type and asset type field management areas. Types and fields can be created, modified, and deleted. Requires access to the System Setup area. 41
Can manage keywords 41
Sources 41
Can see files in this source 42
Can use Directory Browser 42
Can upload to this Source 42
Can create new folders in this Source 42
Can move folders within this Source 42
Can move files within this Source 42
Can sync/resync folders within this Source 42
Can sync/resync files within this Source 42
Can delete folders within this Source 42
Can delete files within this Source 42
Can view file history 42
Can view folder history 43
Can apply folder templates within this Source 43
Can apply metadata templates within this Source 43
Can share directories as smart collections 43
Can share directories for external upload 43
Can relocate files to linked systems 43
Can relocate directories to linked systems 43
Enable SafeSync 43
Can create a Personal Job within this Source 44
Can create a Group Job within this Source 44
Can delete a Personal Job within this source 44
Can delete a Group Job within this source 44
Manage All Jobs 44

Can restore SafeSync deleted files 44
Other 44
Can change own account password 45
Can manage users in children groups to the user’s group only 44
Can email assets to users in the user's own group, children groups and parent group only 45
Allow user group select for determining access level when sharing externally 45
Prevent users from sharing assets with external users 45
Can move files between sources 45
Asset Types 45
Creating a New Asset Type 45
Advanced Asset Type Configuration 46
Allowed Extensions 46
Override Config Options 46
Push Metadata 46
Inherit Global Fields 46
Allow Field-based Watermarks 46
Metadata Fields 46
Creating a New Field 47
Advanced Field Configuration 47
Field ID 47
Title 47
Asset Type 47
Tab Name 47
Field Type 47
Text Box (Single Line) 48
Text Box (Multi-line) 48
Multiselect Drop Down List 48
Drop Down List 48
Release Date 48
Expiration Date 48
User Relationship 48
Taxonomy 48
Dynamic Keywords List 48
Date 48
Warning Message 49
Date Range 49
Asset Relationship 49
Asset Data 49

Field Constraint 49
Shorthand Name 49
Required 49
Order By 49
Searchable Field 49
Enable Partial Indexing 49
Index Field for Searching 50
Display Field 50
Show on Advanced Search 50
Show on Simple Search 50
Show on Faceted Search 50
Update Display Data 50
Exiftool Field 50
FITS Field 50
Contains Personal Data 50
Hide on Upload 51
Hide when Restricted 51
Help Text 51
Tooltip Text 51
IPTC Equivalent 51
Display Template 51
Display Condition 51
Value Filter 51
Regexp Filter 51
Smart Spotlight Name 51
Exiftool Filter 52
External User Access 52
Autocomplete Macro 52
Omit when Copying 52
Sync with Field 52
On Change Macro 52
Include in Metadata Report 52
Custom Asset Watermark 52
Enable Badges 52
Metadata Tabs 53
Related Keywords 53
Creating a New Keyword Relationship 53
Sizes 53
Creating a New Preview Size 54

Additional Size Options 54
Force Maximum Size on Longest Side 54
Allow Preview 55
Allow Restricted Download 55
Plugins 55
Enabled Plugins 55
Available Plugins 56
Plugins List 56
Action Dates 56
Amazon 56
Asset Book 56
Asset Embed 56
Badges 56
CSV Uploader 56
Format Chooser 56
Fusion 57
Google 57
Mac View in Finder 57
oAuth 57
SafeSync 57
Search Notifications 57
SimpleLDAP 57
SimpleSAML 57
Slack 57
YouTube Publish 57
Whiz Forge 57
Sources 58
When Using Multiple Sources Makes Sense 58
Adding a New Source 58
Advanced Source Configuration 58
Name 58
Show hidden files and folders 58
Honor the max result setting 59
Use the absolute path when displaying file path 59
Prepend to source path copy 59
Prevent moving or editing of files and folders that have not been synced. 59
Freeze sublevels of the directory browser 59
Show fields on upload 59

Show contextmenu on upload 59
Reverse the sort of the following folder levels 59
Folder to Field Mappings 60
“match” 60
“field” 60
“level” 60
Setting Status with Mapping 60
1 60
2 60
Setting Archive with Mapping 60
Sources and Group Permissions 61
System Check 61
General 61
Hybrid version 61
Write Access to Filestore 61
Blocked Browsing of Filestore 61
Memory 61
CPUs 62
CPU Benchmark 62
Filestore Write Speed 62
<Source Name> Write Speed 62
PHP 62
PHP Version 62
Configuration File 62
memory_limit 62
post_max_size 62
upload_max_filesize 62
PHP Extensions 62
Database 63
MySQL Version 63
Client-encoding 63
Last Database Backup 63
Database Size 63
innodb_buffer_pool_size 63
log_bin 63
Download MySQL Settings 63
Asset Processing 63
GD Version 63
ExifTool 63

FFmpeg 63
ImageMagick 64
Tree 64
Unzip 64
Vips 64
Php-zip 64
Cron Scripts 64
Last Cron Run 64
'Offline Jobs' Process Lock 65
Jobs in Offline Queue 65
'Create Previews' Process Lock 65
Files in Preview Queue 65
Failed File Previews 65
'SmartSync' Process Lock 65
System Messages 65
System Configuration 66
System Management 66
Application Name 66
Email From Address 66
Email Notify 66
Embedded metadata 66
Allow users to request accounts 66
How often do passwords expire, in days 66
Terms and conditions for download 66
Terms and conditions on first login 67
Enable **Hybrid** API 67
Enable IIIF Support 67
User Interface 67
Application Logo 67
Application Favicon 67
Default Collection Bar Display 67
Asset Comments 67
Default Upload Sequence 67
Show "Spotlights" Link 67
Metadata Report 67
Search Capability 68
Default Sort 68
Default Per Page 68
Default Display 68

Show "Contributed By" on Advanced Search 68
Show "Media" Section on Advanced Search 68
Spotlights 68
Enable Spotlights 68
Show spotlight icons 68
Show spotlight level names 68
Show dash tile icons 68
Show dash tile titles? 68
Actions 69
Enable tasks functionality for all users? 69
Show asset requests by default in tasks lists 69
Show editable assets by default in tasks lists 69
Show account requests by default in tasks lists 69
Manage Badges 69
Assigning a New Badge 70
Advanced Badge Configuration 71
Hover Text 71
Show days till expired 71
Icon Library 71

What is **Hybrid**?

Hybrid is an enterprise-level digital asset management solution, providing a single repository for all rich media assets, such as videos, photos, word docs, PDFs, audio files, and more. End users can find assets in seconds and recall, re-purpose, and re-distribute those assets to colleagues across office locations, as well as those outside your organization if required.

Search More Efficiently

The average employee spends 37 minutes per workday searching for files and assets. **Hybrid** will end frustrating searches and drastically reduce the time spent searching for files located on various drives, desktops, and other storage containers. **Hybrid** users search more efficiently saving time, money, and exponentially increasing productivity.

Increase Asset Value

When your digital assets and associated content cannot be located, the value of those assets is diminished. **Hybrid** keeps your assets and digital content readily available and easy to find, thus extending the lifespan and the value of those assets.

Governance and Control

Hybrid provides permission-based control over your digital assets and content. Decide which users have access to view, edit, download, upload, or any combination of functional permissions. Keeping your assets safe, and secure from misuse.

Hybrid Administration

Administration of **Hybrid** has two main levels. The first level, Admin 360, includes functionality that your 'Power Users' may find useful. The second level, System Management, is meant for your highest-level administrators only, and includes options that drive the way **Hybrid** will be used for everyone else. Groups can be assigned access to one or more areas within each level.

Admin360

Manage Assets

This section allows you to manage assets within certain states, whether it be trashed assets, duplicates, assets with missing original files as well as allowing you to batch update asset metadata using the CSV updater.

To access this, click on the Admin360 icon and select "Manage Assets". This opens another menu containing the following options:

View Trashed Assets

Access to this menu lets an admin either restore or permanently delete the asset.

To restore the asset into the directory, click on the asset to bring up a detailed preview then click on the restore icon.

Furthermore, you may permanently delete an asset by clicking the trash icon in the preview.

View Assets Missing Original File

On the occasions that you have sync issues when moving, renaming, or copying files through **Hybrid** this will trigger the asset to lose their original files.

To view these assets, head over to Admin360, then click on 'Manage Assets' then click on 'View Assets Missing Original File'. This will bring up all assets with missing original files within the system.

View Duplicate Assets

Hybrid detects duplicate assets in the embedded asset data level rather than file names. Access to this menu allows you to view all duplicate assets should you wish to delete them. Simply click on the menu and the system will scour for all duplicates within **Hybrid**.

CSV Metadata Updater

This option lets you update asset metadata in bulk by uploading a CSV containing the new updated metadata of your choice. Simply click on “choose file” then hit upload. Please note, the first line must include column headings, or it will not be processed. Metadata will be linked using asset IDs. If no asset id column is present the CSV will not be processed.

Manage Requests

If configured, some groups or external shares will be required to request assets for download. Requests can be handled directly by anyone who has access to the Request Management area or can be assigned to specific users to handle. Requests can be approved or denied.

To view a list of asset requests in **Hybrid** click on Admin360 and select “Manage Requests”. You’ll see basic information about each request, including the request ID number, username and full name of the requestor, date of request, a count of items being requested, the management method for the request, who’s responsible for handling the request, status, and a list of management tools. You can review a request by selecting ‘Edit’ from the tools list.

Request Management Options

Requested By

The user making the request. If requested by an external party their email address will show.

Date

The date the request was made.

Comments

Details and further information from the requestor about the request. Most often this will include the reason the items are being requested.

Requested Items

If a single asset has been requested a preview will show. Otherwise, a link is provided to show all of the requested assets as a collection.

Assigned To User

If configured, shows the currently assigned user responsible for handling the request. All available users that can be assigned are available in the dropdown menu.

Status

A dropdown list of request status, with the current status selected. Use the dropdown to approve or deny a request.

When denying a request, the following additional option shows:

Reason for declining

An area to explain to the original requestor why the request was not allowed.

When approving a request, the following additional options show:

Expires

A dropdown allowing for an expiration date on the approval link.

Reason for approving

An area to explain why the request was allowed.

Manage Dash Tiles

Dash tiles are quick navigation points to collections, folders, or external resources placed on the home page. Dash tiles can be personal, group specific, or available for all users. If configured, groups can manage their own dash tiles, however this area allows management of dash tiles set for groups and all users.

To view a list of dash tiles in **Hybrid** click on Admin360 and select “Manage Dash Tiles”. You’ll see basic information about each tile, including if the tile is currently set to display, the title and support text, number of assets related to the tile, tile specific settings for displaying the title asset count, and icon, and a list of management tools. You can filter the tiles by group, or toggle to see the tiles as they would show on the Home Page. You can review a dash tile by selecting ‘Edit’ from the tools list. Click the checkbox to toggle the display of the tile on the home page. Use the ‘Visit Target Link’ option to view the collection or external resource linked to the tile.

Dash Tile Management Options

Preview

Displays the dash tile based on the selected settings.

Title

The heading for the tile.

Text

Supporting text for the tile.

Size

Adjust the tile to occupy the default amount of space or double the amount of space on the home page.

Display Title

Show or hide the title when displaying the tile.

Display Icon

Show or hide the icon when displaying the tile.

Visible to

Who can see the tile on their home page. Set to just you, all **Hybrid** users with dash tiles, or certain groups. If “Groups” is selected an additional option displays with a list of current groups to assign the display of the tile to.

Manage Slideshow

Hybrid displays a static background image on the homepage by default. This can be adjusted to a background image of your choice, or a rotation of multiple images. These images can be assets in **Hybrid** or custom image files.

To view a list of the slideshow images in **Hybrid** click on Admin360 icon and select ‘Manage Slideshow’. You’ll see a preview of each slideshow image with buttons to change the order of the images or delete the image from the slideshow. If there is only one image in the slideshow list, you will not be able to delete it.

Creating a Slideshow Image

For custom image use please reach out to your **Hybrid** administrator.

1. Locate the asset you'd like to include in the slideshow and view the asset's details.
2. Click on the 'Manage Slideshow' icon under the asset preview.
3. Crop the image as needed.

Additional Slideshow Options

Move Up

Move the image up one spot closer to the beginning of the list.

Move down

Move the image down one spot closer to the end of the list.

Delete

Remove the image from the list.

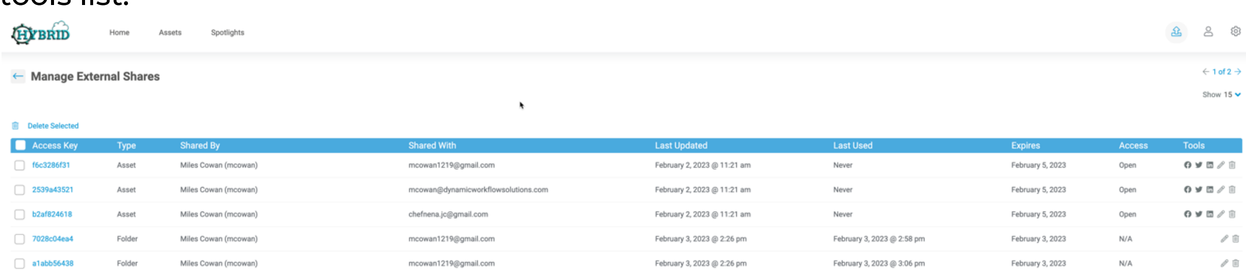
Randomize Single Static Image

Randomly select a single image to display from the list of Slideshow images.

Manage External Shares

Hybrid's ability to share content expands collaboration to people without accounts. Access to uploading, viewing, and downloading assets is possible with external sharing.

To view a list of external shares in **Hybrid** click on Admin360 icon and select 'Manage External Shares'. You'll see basic information about each share, including the key associated with the share, type, user who created it, how the share was delivered, date last changed, date last accessed, expiration date, access, and a list of tools. To review a share, click on the access key, or select the "Edit" icon from the tools list.



External Share Management Options

Access

The access level set on the share. “Open” access typically allows for asset download, and “Restricted” access typically requires that someone request a download. Access does not apply to upload shares.

Expires

The expiration setting for the share link.

Share using permissions from user group

If configured, the user group for which permissions are to be assigned to the share. These settings most often help determine the fields displayed on the share and can also determine preview and download availability.

Share Password

If a share was created with a password, a series of asterisk will show. An existing password cannot be retrieved. If the existing password is lost a new password should be created and saved.

Request Feedback

For collection shares, whether to allow comments on assets.

API Test

Hybrid implements a RESTful API that returns JSON formatted data. It accepts POST requests, and all requests must be signed using a specific user key. The API Test tool allows you to review all API functionality and test API calls.

To view a list of API requests available in **Hybrid** click on Admin360 icon and select ‘API Test’. You’ll see basic information about each request, including possible parameters to pass and an explanation of the data returned. Below is a list of requests:

add/alternative/file

Add an alternative file to an asset.

add/asset/nodes

Add nodes to a given asset.

add/asset/nodes/multi

Add nodes to a set of assets.

add/asset/to/collection

Add an asset to a given collection.

asset/log/last/rows

Retrieve log entries for a given asset based on date or log IDs.

copy/asset

Make a copy of an asset's data to a new asset record identified by given ID.

create/asset

Create a new asset record.

create/collection

Create a new (empty) collection for the current user.

delete/alternative/file

Delete an alternative file associated with an asset.

delete/asset

Move an asset to the trash. If the asset is already in the trash the asset will be fully deleted.

delete/collection

Delete the given collection.

do/search

Find assets based on search criteria.

download/file

Download an asset's file to the local system. This can be used to download specific derivative previews or alternative assets.

get/alternative/file

Get the alternative files associated with an asset.

get/asset/data

Retrieve basic asset data. This will not return all field values for an asset.

get/asset/field/data

Return all field data for a given asset.

get/asset/log

Get log records for an asset.

get/asset/path

Retrieve an asset's server path or URL. SaaS clients will not be able to return server paths.

get/asset/type/extensions

Retrieve the list of extensions used to automatically assign an asset to an asset type. The default asset type will not contain a list of extensions.

get/asset/type

Retrieve the list of available asset types.

get/field/options

Retrieve fixed list options for a given field.

get/related/assets

Retrieve assets generally associated with a given asset.

get/source/structure

Retrieve the contents for a folder within a given source.

get/sources

Retrieve a list of source data for which the user can view or edit assets within.

get/user/collections

Retrieve a list of user collections and their settings. This does not take any permissions into account, so the "count" reflects all possible assets within each collection.

login

Generates a session key for making subsequent API calls.

remove/asset/from/collection

Remove an asset from the given collection.

search/get/previews

Performs search based on the given criteria and also returns the URLs of preview file sizes requested using the $getsizes parameter that match the requested extension.

search/public/collections

Retrieve a list of public collections that satisfy search criteria.

set/node

Create a new node record or update an existing node.

system/check

Retrieve data and stats related to the system.

update/asset/type

Update the asset type associated with an asset.

upload

Upload a file to the system. This can be used to replace an asset's existing original file, or to upload a file as a new asset.

upload/file

Upload a server accessible file to an existing asset record.

upload/file/by/url

Upload a file to an existing asset record that can be retrieved by URL.

upload/file/to/source

Upload a file to a location within a source and create a new asset for it. The file can be local to the system calling the API or accessible via a URL.

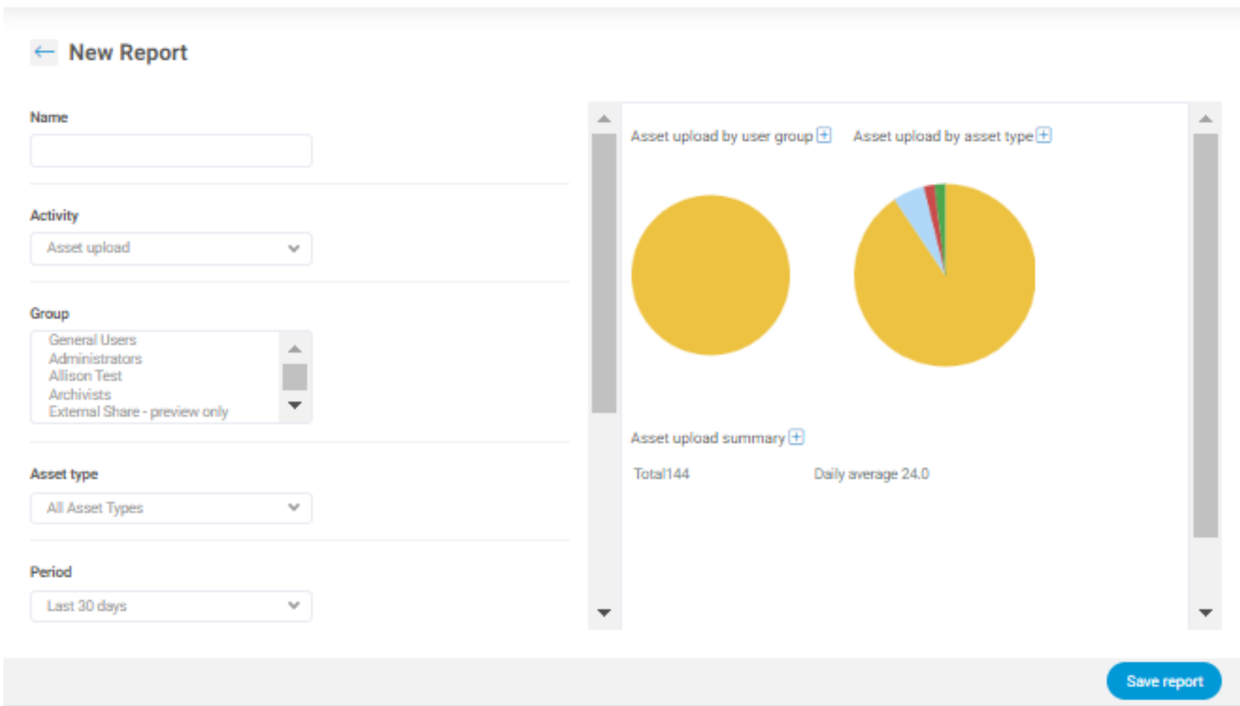
Analytics

Analytics in **Hybrid** provide quick access to general usage statistics in the form of pie charts and summaries. Filters allow for granular control over the data being considered in each report. Analytics can be converted into dash tiles, making them available on the home page.

To view a list of existing analytic reports available in **Hybrid** click on Admin360 icon and select ‘Analytics’. You’ll see basic information about each analytic report, including the name of the report and a list of tools.

Creating an Analytics Report

1. From the Analytics page, click the plus icon next to the page header.
2. Enter a name for the report.
3. Click ‘Save report’.



Additional Analytics Options

Activity

Specific activities within **Hybrid**.

Group

List of groups in **Hybrid**. Select one or more groups, or do not select any groups to show stats for all groups.

Asset Type

Filter by specific asset type.

Period

Show analytics for the given duration.

Collection

Display analytics for a specific collection or spotlight.

External Shares

Determine how external shares are handled for the analytics being displayed. Depending on the activity selected this may not be relevant.

Graph Types

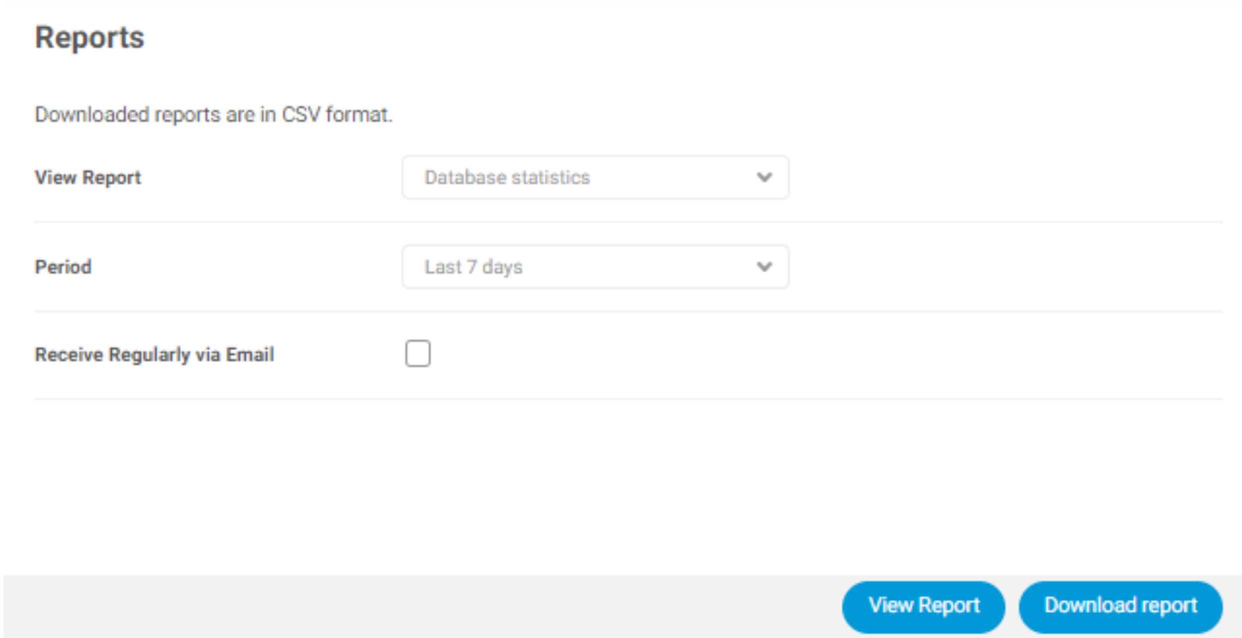
Which graph types to show in the report.

Reports

Reports are similar to Analytics in a lot of ways. One key difference is that reports can be delivered via email at a regular interval. The data can also be downloaded in CSV format, making it easy to import into your favorite spreadsheet software. Unlike Analytics, reports can be created for any data kept within **Hybrid**. Contact your **Hybrid** Administrator for additional assistance on report creation.

To view a list of existing analytic reports available in **Hybrid** click on Admin360 icon and select 'Reports'. You'll be prompted to select a specific report to review and the time period the report should include. You can decide to "View Report", which displays the report on screen, or "Download Report", which downloads the data of the report in CSV format.

For some reports changing the "Period" will not cause any change to the output. These reports typically do not have a date associated with the output.



Receive Regularly via Email

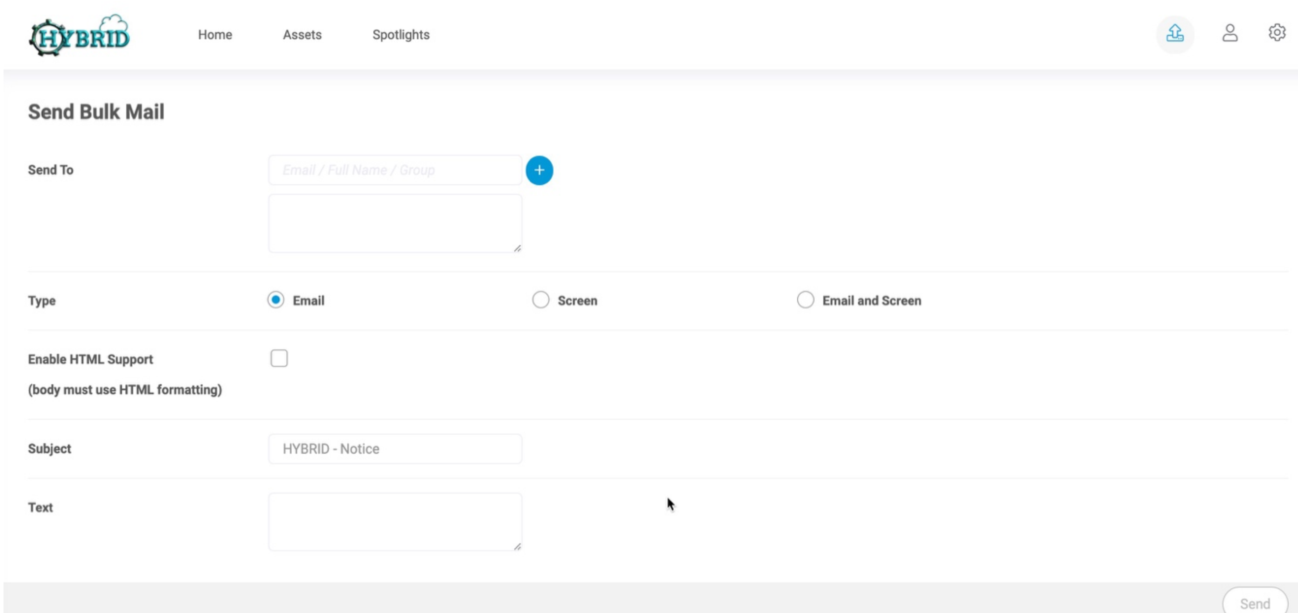
To have a report regularly sent to you via email, click the checkbox. Set the interval that you wish to receive the report and the users that should be included. Then, click 'Create'.

At this time, there are no internal management options available for managing these emailed reports once created. To stop getting regular reports please use the related link in the report's email.

Send Bulk Mail

Bulk Mail provides an easy way to communicate changes in **Hybrid** to multiple users and external emails. As with all email options in **Hybrid** specific groups can be included without having to select all users individually. This option differs from other email options in that no asset or collection is included. This is meant for informational emails only.

To send an informational email click on the Admin360 icon and select 'Send Bulk Mail'.



Bulk Mail Options

Send To

Predictive field for selecting **Hybrid** users or groups. If sending to an external email be sure to type it in full. Hit the plus icon to add the user, group, or email to the sending list.

Type

Email

Send this via email. This is the default and is generally all that is needed.

Screen

Send this via **Hybrid** internal notifications. If selected the correspondence will only be viewable from the **Hybrid** interface.

Email and Screen

Send this via email and **Hybrid** internal notifications.

Enable HTML Support

Use HTML to format the body of the correspondence. Invalid HTML will result in an error and will not send.

Subject

The subject line of the email/screen notification.

Text

The body of the correspondence.

Send Bug Report

On the occasions that you encounter a bug while using **Hybrid**, use this section for a quick and easy way to report these occurrences to the **Hybrid** support staff.

To use the Send Bug Report feature, click on the Admin360 button and click “Send Bug Report”. A text box will appear letting you provide a detailed description of the bug report, once done hit send and the report will be sent over to the **Dynamic Workflow Solutions, Inc.** support team to review the concern and provide a fix if a bug has been confirmed.

System Management

Users

Users give people and systems-controlled access to **Hybrid**. Each user must belong to a group and cannot be part of any other group. Users should be placed into groups appropriate to the level of access they need.

To view a list of the users in **Hybrid** click on Admin360 icon -> System -> Manage Users. You’ll see basic information for each user, including the user’s ID number, username, name, group assignment, email address, account expiration status, date of last activity, and a list of management tools. You can edit a group's setting by clicking on the username or selecting 'Edit' from the tools list.

Creating a New User

1. From the Manage Users page, click on the three dots by the page name.
2. In the 3-dot menu, click on "New User".
3. Enter a username. Usernames have to be unique.
4. Set a password or click 'Suggest' to have one automatically generated. *Note that once the user is created, the password will not be visible for user password security. The admin can reset the password at any time
5. Add the full name of the user - this can appear on the view page for assets they have contributed to **Hybrid**.
6. Select an appropriate group from the dropdown.
7. Add the user's email address, this is mandatory and enables the user to be contacted by the system.
8. Make sure 'Email user a link so that they can reset their password' is checked. This will send the credentials to the email associated with this user.
9. Make sure 'Approved' is checked. This permits the user to have access to **Hybrid**.
10. Click Create.

Advanced User Configuration Options

Account Expires

The date to remove access to **Hybrid** for the user. This can be set to ensure access for a specific duration, or to retire accounts. The format must be as follows: YYYY-MM-DD

IP restriction

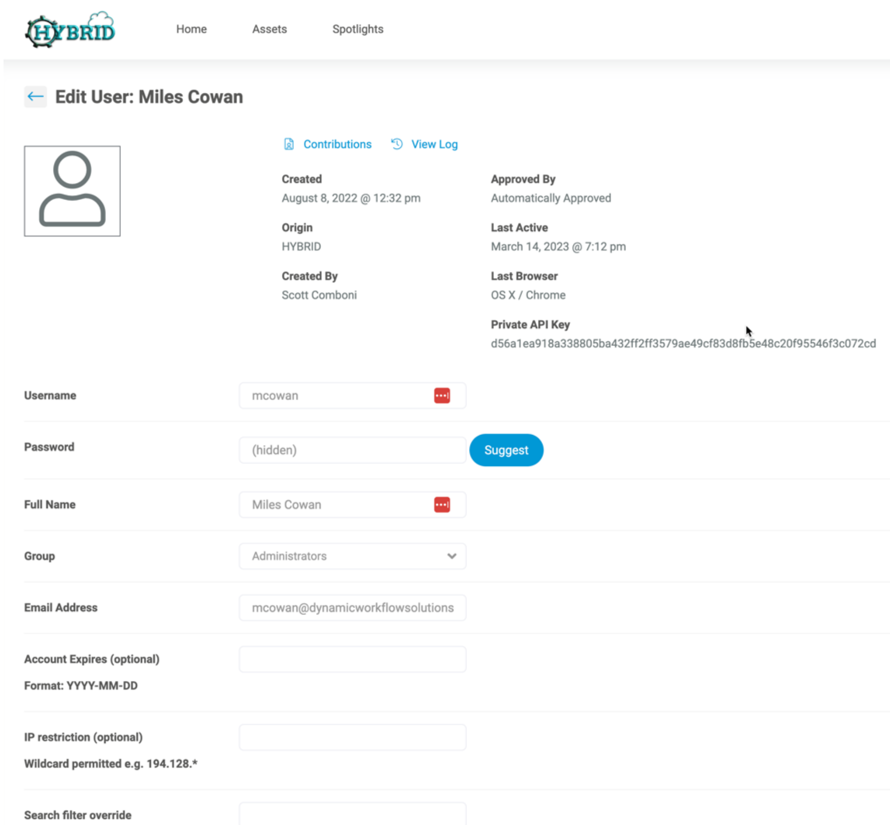
Using a full IP address, IP address range, or partial IP address with a wildcard to limit the user's access to **Hybrid** to specific locations.

Search filter override

This section will override any search filter set at the group level and follows the same format.

Comments

A section for internal notes related to the user.



Groups

Groups are the foundation of permissions within **Hybrid**. Each user must belong to a group and cannot be part of any other group. Groups can be used to mimic organizational structures. However, it is strongly recommended that groups instead be created based on the level of access needed, making each group's permissions unique.

To view a list of the current groups in **Hybrid** click on the Admin Menu icon -> System -> Manage user groups. You'll see basic information for each group, including the group's ID number, name, user count, parent group, and a list of management tools. You can edit a group's setting by clicking on the name or selecting 'Edit' from the tools list. You can view the users in the group by clicking on the user count or selecting 'Users' from the tools list.

There are several preset groups that come with every **Hybrid** deployment. We suggest reviewing the groups that are already in place to see if any will work for you before doing extra work in creating new groups from scratch.

Understanding Default User Groups

Super Admin

This group is typically restricted to **Dynamic Workflow Solutions, Inc.** personnel or trained system administrators and gives full access to **Hybrid**, including but not limited to:

- Add, delete, modify all users, groups
- Add, delete, modify all assets
- Add, delete, modify all metadata
- Add, delete, modify all metadata panels
- Manipulate all aspects of the systems look and feel.
- Modify system setup

DWS will not access the system without direct permission from the customer and a virtual escort at all times.

Administrators

This group is similar to Super Admin but lacks the ability to access the System Setup pages. It is typically used for internal power users/admins.

General Users

This group is where the bulk of your users will be. They have the ability to add and modify assets and collections but lack any administrative access.

Creating a New User Group

The minimum steps needed to create a new user group are as follows:

1. From the Manage Groups page, click the (+) symbol.
2. Add a group name in the “Name” input.
3. Assigning permissions using the Permission manager.
4. Click save.

Advanced Group Configuration

The following information and options are available when editing a user group:

Reference

The unique identifier for the group. This is most often needed when making adjustments to the configuration file. This cannot be edited.

Name

The friendly name for the group. The group name is referenced in plugin settings, user settings, and in the 'Parent' space on the same page.

Contains

Provides a user count and child group count.

Permissions Manager

This is where the bulk of permissions settings are handled. Contains a button to get to the permissions manager, a comma-separated list of permission codes, and a link to the permissions help text file. For details about the permissions please see the following section.

Parent

A reference to another group. This can be used to relate variations on a group, restrict access, or to inherit permissions from the parent.

Restrict Directory Access

Checkbox to toggle the use of directory blacklisting and/or whitelisting. These settings can be unique for each source. When checked the following additional fields will appear:

Directory Whitelist

A list of folders to whitelist, or specifically allow access to. Files within the whitelisted directory and its subdirectories will be viewable. The format for whitelisting folders is as follows:[folder_name],[another_folder_name]

Directory Blacklist

A list of folders to blacklist or specifically deny access to. Files within the blacklisted directory and its subdirectories will not be viewable. The format for blacklisting folders is as follows:[folder_name],[another_folder_name]

Search, Edit & Derestrict Filters

These group options expand or restrict assets based on an asset's field metadata.

Search Filter

Further restrict viewable assets.

Edit Filter

Further restrict editable assets.

Derestrict Filter

Permit access to assets that would otherwise be restricted to the group.

Filter configuration

Use the Shorthand name for the field you want to target, and one or more values contained in the field. The generic syntax is as follows:
{shortname}{operation}{value(s)}[;{shortname}{operation}{value(s)}]
For multilingual field options, the full i18n syntax string (e.g. ~en:Red~fr: Rouge) must be used here instead of a translated option.

Filter Operation Options

Equals (=)(Equals Character)

Include assets where a field has a specific value.
Example: country=Albania
You can only see assets that have a country value of "Albania".

Or (|)(Pipe character)

Include assets where a field contains one of many possible values.
Example: country=Albania|Brazil
The user will see assets where the country is Albania OR Brazil.

Not (!=)(Exclamation Mark and Equals Characters combined)

Include assets where a field does not have a specific value.
Example: country!=Albania
The user will see any assets that do NOT have the country value set to Albania.

Multiple keywords can be specified here too using the same Or syntax.
Example: country!=Albania|Brazil
The user will see any assets that do NOT have the country value set to Albania OR Brazil.

Using Multiple Fields in a Filter

Multiple matches can be achieved by separating each statement with a ';' symbol. Both statements must match the given values and they are applied in the order that they appear i.e. the first statement runs first.
Example: country=Albania;emotion=Happy
The user can only see happy photos from Albania.

AND and ORs can be combined. In this case the OR is performed first.
Example: country=Albania|Brazil;emotion=Happy

The user will see assets where the country is Albania OR Brazil, AND the emotion is Happy.

It is possible to implement OR matching across multiple fields, by using the Or sign in the left hand also. For example:
Example: country|emotion=Albania|Brazil|Happy
This means either the country or emotion fields must contain any of the values of Albania, Brazil or Happy.

Asset Defaults

Field settings to be applied to any asset uploaded by a user in the group. The format for this is similar to filtering 'Equals' condition, though it cannot use 'Or' operator in the value.
Example: country=Albania
All assets uploaded by the group will have the country field set to a value of "Albania".

Override Config Options

Adjust configuration options globally applied via **Hybrid's** configuration files. This includes plugin configuration options.

Email Welcome Message

IP Restriction

Restrict users in the group to have access to **Hybrid** from specific IP addresses.

Request Mode

The workflow used when requesting assets. For most groups, the default 'Managed Requests' should be used.

Group Logo

Upload a custom logo to replace the default application logo in the header.

Permissions Manager

Hybrid includes many permission options ranging from generalized to granular. It's important to understand that these permissions work together, are superseded by the global configuration settings, and adhere to the rule of least privilege. For example, should a group be able to view all Images but access to Active assets is blocked, the group will only be able to see non-active Images.

Changes within the permission manager are saved on change and take effect immediately.

Searching & Access

Search Capability

Search for assets in **Hybrid**. Enables simple search bar and advanced search (if configured).

Can download restricted assets and view confidential assets (normally admin only)

Restricted assets are treated as Open assets, making them available for download. Confidential assets will be returned in search results and are treated as Open assets.

Can download expired assets

Allow expired assets to be downloaded. Assets become expired when an expiration field has a date that is in the past.

Can download unreleased assets

Allow unreleased/embargoed assets to be downloaded. Assets are considered unreleased when an unreleased field has a date in the future.

Block access to workflow state ‘<workflow_state>’

This is an easy way to lock a group of users out of assets based on an asset’s current workflow state. Assets in the specified workflow state will not be viewable, editable, or returned in search results. If the group has the ability to change the workflow state on assets any blocked states will not be available in the dropdown list.

When to Block Workflow States

Pending Submission
Set for groups whose uploads are marked as 'Active' and do not participate in a submission/review process.
Pending Review
Set for groups who are not responsible for reviewing assets as part of the submission/review process.
Active
Set for groups who are not meant to see the main catalog of assets but play a role in the contribution of assets to **Hybrid** or their retirement.
Pending Archive
Set for groups who are not responsible for selecting assets for archiving/retirement.
Archive

Set for groups who are not meant to see retired/archived assets.

Restrict access to all available assets

Marks all assets with the status of ‘Restricted’ regardless of the asset’s status setting. Restricted assets can be searched for and viewed but cannot be downloaded.

Can make asset requests

Allows Restricted assets to be requested for download, replacing the ‘Download’ buttons on a restricted asset’s detail page with ‘Request’ buttons.

Show watermarked previews/thumbnails

Forces previews of assets to be shown with watermarks. Requires watermarking of assets be enabled and watermarked previews have been created.

Metadata Fields

This section contains view and edit permissions for each metadata field.

Can see all fields

When enabled, every metadata field in **Hybrid** will be displayed. In this mode, any new fields will also be displayed.

When disabled, a list of every metadata field is displayed, and every needed field must be selected. In this mode, any new fields will not be viewable until they are selected.

Can edit all fields (for editable assets)

When enabled, every metadata field in **Hybrid** will be editable for any editable asset. In this mode, any new fields will also be editable.

When disabled, a list of every metadata field is displayed, and every needed field must be selected. In this mode, any new fields will not be editable until they are selected.

Asset Types

This section includes permissions based on an asset’s type. You will find the options below for each asset type configured.

Can see asset type ‘<type>’

Allows the specified asset type to be viewable and searchable (if configured).

Restricted access only to asset type ‘<type>’

Marks assets of the specified type as restricted, which will prevent downloading, enable requesting (if enabled) and show watermarked previews (if enabled).

Restricted upload for asset type ‘<type>’

Prevents assets from being uploaded based on the extension mappings for each asset type. Also prevents the asset type from displaying in the asset type list on the upload page and edit page (if enabled).

Edit access to asset type ‘<type>’

Makes assets of the specified type editable. The level of editability is dictated by other permissions.

Asset Creation & Management

This section deals with the ability to upload, edit, and delete assets.

Edit access to workflow state ‘<workflow_state>’

Makes assets of the specified workflow editable. The level of editability is dictated by other permissions. If an asset state has been blocked but is marked as being editable the blocking will supersede the edit permission.

Edit access to access state ‘<access_state>’

Makes assets of the specified access state editable. The level of editability is dictated by other permissions.

Can create/upload files (admin users; assets go to the ‘Active’ state)

New assets can be uploaded and are placed in the ‘Active’ workflow state. Enable this for groups that require no oversight with regards to asset content or completeness of metadata fields. If allowing this permission, the permission below should not be allowed.

Can create/upload files (normal users; assets go to ‘Pending submission’ state via My Contributions)

New assets can be uploaded and are placed in the ‘Pending submission’ workflow state. These assets will have to be sent for review and approval before becoming part of the main ‘Active’ catalog. Enable this for groups that require oversight with regards to asset content of completeness of metadata fields. If allowing this permission, the permission above should not be allowed.

Can delete assets (to which the user has write access)

Editable assets can be put into the 'Trashed' workflow state or permanently deleted (if the group has edit access to the 'Trashed' workflow state).

Can manage archived assets

Allows the group to be able to view, edit, and manage any assets that have been placed in the "Archived" workflow state.

Can manage alternative files

Allows the group to be able to upload, edit, and delete any viewable asset's "alternative files".

Can tag assets using 'speed tagging' (if enabled in the configuration)

This must also be enabled in the System Setup area - but allows access to a 'gamified' keyword tagging page.

Can share assets

Allow assets to be shared individually, within collections, or via folder shares. Additional settings are required to share assets within sources.

Prevent users from sharing assets with external users

If sharing has been allowed, only allow sharing with **Hybrid** users. This prevents sharing to anyone that does not have a **Hybrid** account.

Disable locking of editable assets (locking is used to prevent assets being edited by other users)

Prevent the group from locking down assets within the system. When an asset is locked it cannot be edited.

Can upload asset data via csv

Allow batch creation of assets and their metadata through the use of a CSV file. Requires the CSV Upload plugin be enabled.

Can edit metadata via csv

Allow batch editing of asset metadata through the use of a CSV file. Requires the CSV Upload plugin be enabled.

Collections

Enable the bottom collection bar (‘Lightbox’)

Enables the use of the collection bar or lightbox. Collections are personal or public groupings of assets that facilitate batch editing, relocation, downloading, sharing, and other actions within **Hybrid**.

Can publish collections as spotlights

Enables the categorization of public collections.

Can create upload links

Enables the option to create upload shares to specific source folders.

My dash

Enables the use of personal dash tiles.

Can see all spotlight categories

When enabled, all spotlights are accessible. Any new spotlights will be allowed access.

When disabled, a list of current top-level spotlight categories will display. Each level must be selected to permit access to it. When a level is selected, any child levels will subsequently be displayed for selection. New spotlights will not be given access to automatically.

When searching, display only assets that exist within spotlights to which the user has access.

Enable to restrict search results and viewable assets to those contained within accessible spotlights. Useful when a group should only have access to a curated set of assets.

Administration

This section deals with application administrative permissions. Take great care when enabling permissions in this section as they alter the look, feel, and functionality of the application as a whole, as well as at the group, user, and asset levels.

Can access the ‘Admin360’ area

This is the base permission for most administrative actions. When enabled, access to the Admin Menu will be available. The following additional permission settings will also display:

Can manage research requests

Enables the approval and denial of research requests (if enabled).

Can manage asset requests

Enables the approval and denial of requested assets (if enabled). Exposes additional permissions:

Can assign asset requests to others

Provides a list of users that can manage asset requests and be assigned within the request details for delegation. The names of all users within this group will be omitted from the delegation list but can still manage any asset request.

Can be assigned asset requests (also; can only see asset requests assigned to them in the Manage Asset Requests area).

Allows the users within the group to be assigned asset requests to be managed. Users will only see asset requests that have been delegated to them.

Manage default dash / all user tiles (Requires ‘h’ permission)

Enables the management of default user dash tiles as well as dash tiles marked visible for all users.

Manage user group dash tiles

Enables the management of group-specific dash tiles. This should be given to admin type groups only, as an understanding of all available groups is needed for proper management.

Can bulk-mail users

Enables the bulk mail feature, which allows mass emails to be sent to any or all application users.

Can manage asset comments

Allow the group to manage all asset comments, not just the comments they’ve created.

Can access API test tool

Enables access to the API call test area if the API is enabled.

Can manage all external shares

This allows the users to be able to see and edit assets and collections that have been shared externally.

System Management

Can access the ‘System’ area

Enables access to the highest level of application logs and management areas. Please note: removing this permission from your own user group will lock you out of the permission management page. Exposes additional permissions:

Can manage users

Enables access to the User management area, thereby allowing the group to create, edit, and delete user accounts.

Can manage groups

Enables access to the Group Management area, thereby allowing the group to create, edit, and delete groups.

Can manage asset types and asset type fields

Enables access to the asset type and asset type field management areas. Types and fields can be created, modified, and deleted. Requires access to the System Setup area.

Can manage keywords

Enables the curation of fixed-list field dictionaries.

Sources

This section deals with directory browser permissions on a per-source level. A section for each configured source will be displayed, allowing groups to have access to one, many, or no sources and their assets.
If you have configured **Hybrid** to store original files in the file store this section will not apply.

Can see files in this source

Permits access to the assets within the source, thereby allowing them to be searched for, viewed, and edited depending on the group’s configuration. All subsequent source permissions require this permission.

Can use Directory Browser

Enables the Directory Browser display for the source, allowing for a non-metadata-driven method for locating assets.

Can upload to this Source

Permits uploading of new assets to the source.

Can create new folders in this Source

Permits the creation of root and nested folders within the source via the right-click Directory Browser context menu.

Can move folders within this Source

Permits the relocation of directories and their contents via the Directory Browser's drag and drop functionality within the source.

Can move files within this Source

Permits the relocation of files via the Directory Browser's drag and drop functionality within the source.

Can sync/resync folders within this Source

Permits the ingestion of folders and their contents added to the source through external means as well as the re-processing of existing assets within a folder.

Can sync/resync files within this Source

Permits the ingestion of files added to the source through external means as well as the re-processing of existing assets.

Can delete folders within this Source

Permits the deletion of folders and their contents directly from the Directory Browser for the source. Please note, this is a permanent delete and files cannot be recovered through **Hybrid**.

Can delete files within this Source

Permits the deletion of files directly from the Directory Browser tree. Please note, this is a permanent delete and files cannot be recovered through **Hybrid**.

Can view file history

Enables a right-click context menu option to display the asset history within the source. History information includes creation, relocation, and renaming of the file and the user responsible for the action.

Can view folder history

Enables a right-click context menu option to display the folder history within the source. History information includes creation, relocation, and renaming of the file and the user responsible for the action.

Can apply folder templates within this Source

Enables the application of a predefined directory structure template. Directory templates are a structure of folders and subfolders. These are great for an organization that uses a repeating folder structure for projects.

Can apply metadata templates within this Source

Enables the application of a predefined metadata template to assets within a folder. Much like the ability to bulk edit assets in a collection, this functionality takes a template of metadata values and applies it to all assets within the directory and sub-directories.

Can share directories as smart collections

Enables a right-click context menu option that creates a smart collection of the directory and directs the user to the share screen. Requires smart collections be enabled and the group has the ability to share collections.

Can share directories for external upload

Enables a right-click context menu option that creates an external share for the directory for the exclusive use of uploading content to it.

Can relocate files to linked systems

Enables the scheduling of assets to be transferred from one **Hybrid** installation to another. Great for organizations with a dedicated Archive installation, or for those that utilize individual installations per region. Requires Fusion add-on.

Can relocate directories to linked systems

Enables the scheduling of directories to be transferred from one **Hybrid** installation to another. Great for organizations with a dedicated Archive installation, or for those that utilize individual installations per region. Requires Fusion add-on.

Enable SafeSync

Hybrid's Enterprise Sync-Share feature allows direct access to some or all of a source from a local machine, thereby allowing a user to work directly with the files. These changes sync up to **Hybrid** (and any other users with a sync-share agent). Enables SafeSync sync/share management settings for the share. Please note: If you are using the selective-sync method these options do not apply. All subsequent permissions require this to be enabled. Requires SafeSync add-on.

Can create a Personal Job within this Source

Enables a right-click context menu option to create a personal sync job, keeping all files and subfolders synced between the user and **Hybrid**.

Can create a Group Job within this Source

Enables a right-click context menu option to create a group sync job, keeping all files and subfolders synced between a selectable set of users and **Hybrid**.

Can delete a Personal Job within this source

Enables a right-click context menu option to delete a personal sync job, removing all the files and subfolders from the user's local machine. The files will remain on **Hybrid**.

Can delete a Group Job within this source

Enables a right-click context menu option to delete a group sync job, removing all the files and subfolders from the selected users' local machines. The files will remain on **Hybrid**.

Manage All Jobs

Enables the management of jobs created by any user for the source.

Can restore SafeSync deleted files

From the asset view page, allows for the restoration of files deleted via Sync-Share if they still exist in the archive.

Other

This is a catch-all for permissions that do not fit in any other category

Can change own account password

Permits users within the group to reset their own application password via the login page or change it when logged in. If disabled, users will require the assistance of an admin to perform this task. This is not applicable for user accounts created and managed via an LDAP/AD/SAML/SSO plugin.

Can manage users in children groups to the user's group only

Restricts user visibility and management to users in child groups. If you have dedicated **Hybrid** managers for various areas of your organization this permission would be helpful in creating a silo for user management capabilities.

Can email assets to users in the user's own group, children groups and parent group only

When using auto-completion in a list (ex: when sending an asset by email) the users will only see their own group's users as well as their children and parent groups.

Allow user group select for determining access level when sharing externally

Enables the ability to share assets and collections externally and assign permissions on the shared assets based on group permission settings. This should really only be enabled on groups that have knowledge of group permissions.

Prevent users from sharing assets with external users

Restricts the sharing of assets to people with **Hybrid** accounts.

Can move files between sources

Permits relocation of files to another source. Requires access to multiple sources.

Asset Types

Asset types help categorize assets and allow for custom fields to be associated with assets. By default, the asset types in **Hybrid** are assigned automatically upon upload based on the file extension. The default types, in general, cover a wide range of assets you might consider managing in **Hybrid**. However, these can be customized to whatever works for your organization.

To view a list of the asset types in **Hybrid** click on Admin360 icon -> System -> Manage Asset Types. You'll see basic information for each type, including the type's ID number, name, number of type specific fields, number of assets associated with the type, and a list of management tools. You can edit a field's setting by clicking on the name or selecting 'Edit' from the tools list.

Creating a New Asset Type

1. From the Manage Asset Types page, click on the plus icon by the page name.
2. Include a name for the asset type.
3. Click 'Save'.

Advanced Asset Type Configuration

Allowed Extensions

A comma separated list of file extensions that this type should include. All extensions should be in lowercase. If an extension is included in more than one asset type the asset will be assigned the type with the lowest ID.

Override Config Options

Allows custom configuration values for each asset type, affecting search results, asset view and edit pages.

Push Metadata

If set, the metadata for this asset will be displayed on the asset view page for any related assets. For example, you may relate several photos to a person asset. If this property is set on the person asset, then the person metadata will appear on all related photo asset records, avoiding duplication of data in the system.

Inherit Global Fields

Include fields of type “Global” for assets assigned to this type.

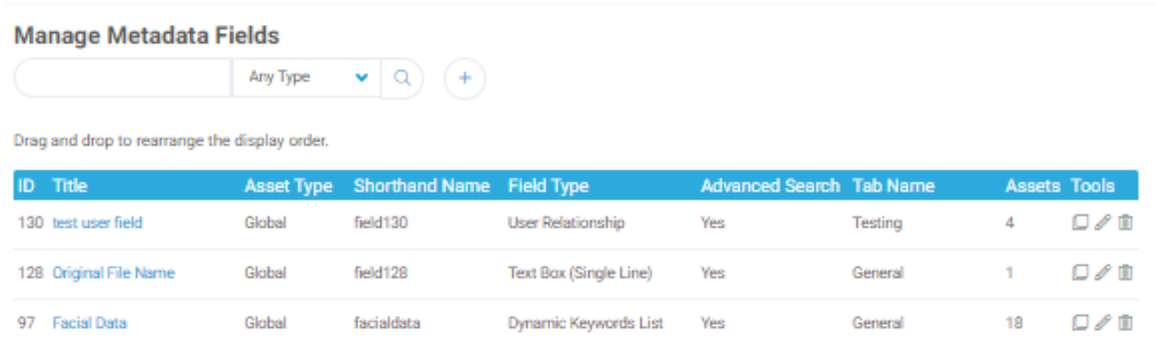
Allow Field-based Watermarks

Exposes the field level custom watermark option on a field’s management page.

Metadata Fields

Fields provide specific details to assets. They can display information embedded within the asset. Fields can be customized to store data specific to your organization. Data within these fields can be used to restrict or permit access to assets and written back to the asset on download.

To view a list of the fields in **Hybrid** click on Admin360 icon -> System -> Manage Metadata Fields. You’ll see basic information for each field, including the field’s ID number, title, related asset type, shorthand name, type, searchability, associated tabs, number of assets with field contents, and a list of management tools. You can edit a field's setting by clicking on the title or selecting 'Edit' from the tools list.



Manage Metadata Fields

Any Type

Drag and drop to rearrange the display order.

ID	Title	Asset Type	Shorthand Name	Field Type	Advanced Search	Tab Name	Assets	Tools
130	test user field	Global	field130	User Relationship	Yes	Testing	4	
128	Original File Name	Global	field128	Text Box (Single Line)	Yes	General	1	
97	Facial Data	Global	facialdata	Dynamic Keywords List	Yes	General	18	

Creating a New Field

1. From the Manage Fields page, click on plus icon by the page name.
2. Provide a title for the field.
3. If the field is specific to an asset type, select the asset type from the dropdown menu.
4. Select one or more tabs to display the field on.
5. Adjust the type of field.
6. Click 'Save'.

Advanced Field Configuration

Field ID

The unique identifier for the field.

Title

The label for the field.

Asset Type

Whether the field is specific to an asset type. Use 'Global' for fields that are not type specific.

Tab Name

The name of the tab to display the field on. If no value is selected the field will not be displayed on asset view or when editing.

Field Type

The style of the field, both when displayed and when editing assets.

Text Box (Single Line)

An open text field. While there is no limit on the amount of text that can be added, the field is designed for editing a short line of text. Can be constrained to accept only numbers.

Text Box (Multi-line)

An open text field designed for editing larger amounts of text.

Multiselect Drop Down List

A selectable list of predefined field options. Users can select one or more of these options.

Drop Down List

A selectable list of predefined field options. Users can select only one of these options.

Release Date

A date in which the asset should be considered released. If the current date is before the date specified, the asset is considered unavailable for use.

Expiration Date

A date in which the asset should be considered expired. If the current date is after the date specified, the asset is considered unavailable for use.

User Relationship

A field allowing for the connection of an existing user to the asset.

Taxonomy

A categorized list of predefined field options. Users can select one or more of these options, and options usually get more specific as with each level.

Dynamic Keywords List

A predictive list of predefined field options. Users can select one or more options or add a new option on the fly. Can be constrained to prevent users from adding new options on the fly, or to allow only one selection.

Date

A field to store dates.

Warning Message

A text field that should be used to provide important information related to how an asset should be used within your organization.

Date Range

A field to store a date range.

Asset Relationship

A field allowing for the categorized connection of one or more assets to another asset.

Asset Data

Contains basic asset information related to who uploaded the asset and when, the asset's filename and extension, an asset's type, when it was last modified, etc.

Field Constraint

Field type specific options to constrain the data in the field.

Shorthand Name

Unique verbal identifier for the field to be used in search/edit filters. It must contain only lowercase alphabetical characters and/or numbers - no spaces or symbols.

Required

Require the field to be populated when uploading or editing.

Order By

The order in which the field will be displayed within the set tab.

Searchable Field

If the field's data should be evaluated when performing searches. If enabling this on a field with data, the field must be manually indexed.

Enable Partial Indexing

Allow for parts of whole words to be evaluated when performing searches. Should be used sparingly as it will increase asset processing and search times. If enabling this on a field with data, the field must be manually indexed.

Index Field for Searching

A link that should be clicked to perform manual indexing of a field.

Display Field

Display the field's data on the asset's view page.

Show on Advanced Search

Display the field on the advanced search page. The field must also be set to be searchable.

Show on Simple Search

Display the field in the search bar's list of fields to focus the search on. The field must also be set to be searchable.

Show on Faceted Search

Display the field in the faceted search panel, allowing granular refinement of a base search. The field must also be set to be searchable. If enabling this on a field with data, the field's display data must be manually updated.

Update Display Data

A link that should be clicked to perform manual updating of a field's search results data.

Exiftool Field

The tag group and tag name for which to extract an assets embedded metadata from for use in this field. Also used to write metadata back to the asset on download. All tag names are case sensitive. Please do not include special characters or hyphens. Should follow the format <tag_group>:<tag_name>. To extract embedded data on existing assets, use the 'Extract Metadata' button.

FITS Field

FITS (File Information Tool Set) field will overwrite Exiftool values if a value can be found!

Contains Personal Data

This will prevent field data from being shared/edited when enabled.

Hide on Upload

Do not display the field for data population on upload. This should be set on fields meant to be extracted for the asset and should go unchanged. (Ex: Color Mode)

Hide when Restricted

Do not display the field to users with restricted access to the asset.

Help Text

Text that will appear below the field that guides a user when entering metadata.

Tooltip Text

Text that will appear in simple/advanced search when the cursor hovers over the field.

IPTC Equivalent

The IPTC field name to link to this field. Will be used in extraction and writing of metadata.

Display Template

Custom HTML used on the asset view page for display. Two placeholders - <Title> and <Value> - should be used.

Display Condition

Conditions that must be met for the field to be displayed on the asset view page and when editing. Uses the same format as group search filter.

Value Filter

PHP code that should be applied to manipulate the displaying of the field's value. Use the variable $value when manipulating.

Regexp Filter

PHP style regular expression filtering to be applied to the field's value - e.g. '[A-Z]+' will ensure only upper case letters can be entered.

Smart Spotlight Name

An auto-generated spotlight based on the field's values.

Exiftool Filter

This is used when writing metadata to a field.

External User Access

Display the field when sharing the asset externally. This may be overwritten when specifically a share group.

Autocomplete Macro

Please ignore this field and contact **Dynamic Workflow Solutions, Inc.** support if you feel that it is needed/wanted for your install.

Omit when Copying

When using the ‘Copy From’ option, do not include this field.

Sync with Field

Keep data consistent with another field. This allows for several fields that are the same (e.g. in different asset types) to be kept synchronized. Note that a few options are deliberately not copied - resource type, order by and tab name (to allow independent positioning), and also this sync setting.

On Change Macro

Please ignore this field and contact **Dynamic Workflow Solutions, Inc.** support if you feel that it is needed/wanted for your install.

Include in Metadata Report

Include this field by default on metadata reports.

Custom Asset Watermark

Use the data within this field when watermarking. Consider using this on a field that contains a photographer’s copyright. If no data is in the field no watermark will be made. If the field is associated with a specific asset type, this requires Custom asset watermarking be enabled for the type.

Enable Badges

Allow badges to be set for the values of this field. Requires the Badges plugin be enabled.

Metadata Tabs

Metadata tabs is a way to keep your metadata fields organized and grouped to fit your system's needs.

To access this, click on the Admin360 icon, head to 'System Management' then click on 'Manage Metadata Tabs'. This will bring up a list of all existing Metadata tabs and the ability to add a new tab.

To add a new tab, simply click on the (+) icon and you will be asked to name the tab then hit save to finish creating the tab.

Related Keywords

Hybrid utilizes a stemming method when searching to include similar keywords in keyword searches. These return assets tagged with 'joints' if searching for assets tagged with 'joint' or assets tagged with 'copy' when searching for assets tagged with 'copies.' While this helps with many generic word relationships it does nothing for related words that do not have a similar base. This is where Related Keywords comes in, allowing you to add custom keyword relationships.

To view a list of existing keyword relationships, click on Admin360 -> 'System Management' and select 'Manage Related Keywords'. The display includes the keyword that is the foundation of the relationship, a list of words that are related, and management tools.

Creating a New Keyword Relationship

1. From the Manage Related Keyword page, click on the plus icon next to the page heading.
2. Include a single keyword as the base.
3. Include a comma separated list of other words and phrases that should also be searched for when passing the base keyword as a search term.
4. Click "Save'.

Sizes

Hybrid can automatically generate JPEG versions of assets that are contained within desired dimensions. We suggest using this feature to make available versions of a file that are most often requested.

To view a list of the badges in **Hybrid** click on Admin360 icon -> System -> Manage Sizes. You'll see basic information for each size including the unique identifier, name, width constraint, height constraint, and a list of management tools. You can edit a size by selecting 'Edit' from the tools list. Sizes that do not show an edit icon are set by **Hybrid** and cannot be adjusted.


Manage Sizes

Show 15

ID	Name	Width	Height	Tools
col	Collection	75	75	
thm	Thumbnail	150	150	
pre	Preview	700	450	
scr	Social Media	1400	800	
lpr	Low resolution print	2000	2000	
hpr	High resolution print	4000	4000	

Customized image and video previews with more granular control can be created by including configuration options in your configuration file. Contact your **Hybrid** administrator for more information.

Creating a New Preview Size

1. From the Manage Sizes page click the plus icon next to the page heading.
2. Add a unique identifier for the size. This is typically a 3-4 letter short code mimicking the name.
3. Add a friendly name. Try to provide some context for the preview. For example, if the preview is designed to be used for Social Media sites, use 'Social Media' for the name.
4. Set a containing width that the preview should adhere to.
5. Set a containing height that the preview should adhere to.
6. Click 'Save'.

Additional Size Options

Force Maximum Size on Longest Side

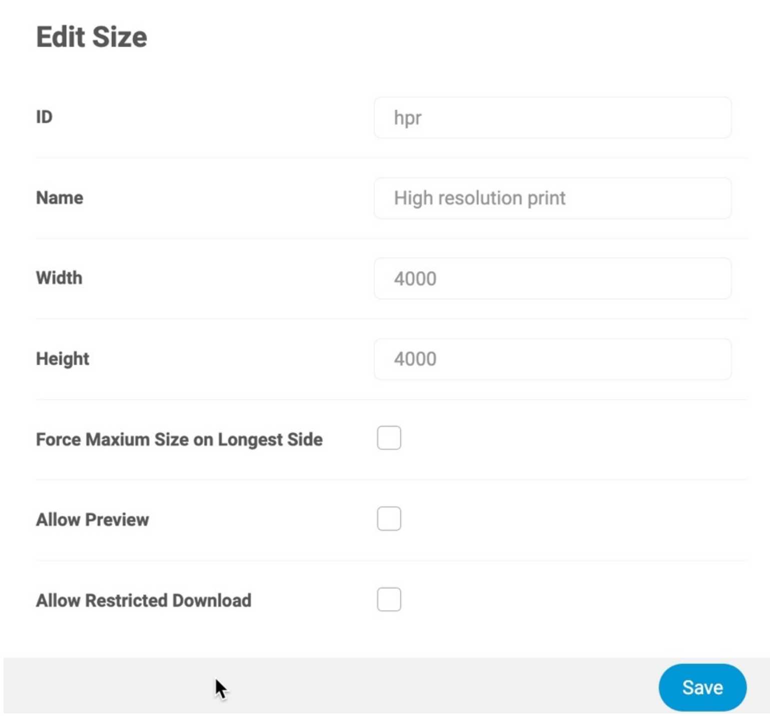
Rather than the width or height being a maximum for which the generated preview needs to fit within while retaining aspect ratios, use the size from the larger of the two dimensions as the size for the preview. The aspect ratio will be retained, but the shorter side may exceed the set dimension. The results will vary among assets.

Allow Preview

Make the preview available for viewing without the need to download.

Allow Restricted Download

Make the preview available for download when the asset is restricted to the user.



Plugins

Hybrid's flexibility and customizability lets you integrate plugins and extensions that fit the need of your workspace.

To view this menu, click on the Admin360 button, head over to "System Management" then click on "Manage Plugins". Two tabs will be available.

Enabled Plugins

As the name suggests, this list displays any plugins that are currently enabled in **Hybrid**. The list includes the plugin's name, a brief description of the functionality included with the plugin, the plugin's version number, and a list of tools. Every plugin will have the ability to disable it. Some plugins may require additional setup or have configuration options available. Some plugins may also allow you to set the availability of the plugin's functionality by group.

Available Plugins

Available plugins display any plugins that are available in **Hybrid** but have not been enabled. The list is similar to what is seen in "Enabled Plugins" with two key differences. The only tool available is the ability to activate the plugin. Additionally, available plugins are grouped into sub tabs based on functional categories. Some plugins may show under more than one category.

Plugins List

The available plugins may differ on your **Hybrid** system. For more details about a specific plugin please contact **Dynamic Workflow Solutions, Inc.** support.

Action Dates

Enables scheduled deletion or restriction of resources based upon date fields.

Amazon

Provides many AWS specific utilities and tools.

Asset Book

Turn your assets into a pdf booklet.

Asset Embed

Present embed code for assets.

Badges

Enable graphical badges for asset type fields.

CSV Uploader

Allows you to upload metadata using a CSV file.

Format Chooser

Allows you to choose different formats when downloading files which are generated on the fly.

Fusion

Relocate assets between **Hybrid** installations.

Google

Analytics, API, oAuth, Vision.

Mac View in Finder

View in Finder Link - support for multiple sync directories.

oAuth

OAuth2 server implementation that serves as a foundation for other integrations.

SafeSync

Sync files from **Hybrid** to your local machine.

Search Notifications

Notifies user when changes occur to saved searches.

SimpleLDAP

Simpler implementation of LDAP authentication, targeted at Active Directory but also supports Oracle directory.

SimpleSAML

Use SAML authentication to access **Hybrid**.

Slack

Post files and comments to Slack from **Hybrid**. Search, view collections, and include **Hybrid** files from Slack.

YouTube Publish

Publishes video assets to a configured YouTube account.

Whiz Forge

Duplication of stored data into a custom table for the sole purpose of increasing query speeds.

Sources

Hybrid offers the ability to link multiple folder locations as unique 'sources.' By default, a single source exists. Additional sources can be created. Each source has dedicated group permissions making it possible for general view access to one or more groups. Additionally, each source uniquely sets related functionality permissions. Groups can have dedicated sources or access to all sources with the ability to upload to just one.

To view a list of the sources in **Hybrid** click on Admin360 icon -> System -> Manage Sources. You'll see basic information for each source including the unique identifier, name, server path, and a list of management tools. You can edit a source by selecting 'Edit' from the tools list.

When Using Multiple Sources Makes Sense

Multiple sources afford more granular permissions but do require additional set up at the group level. As a result, sources should be considered only when unique permissions are required. If you do not need to tailor view/edit access outside of your original sync directory, consider linking the new path to the first level of an existing source. This will keep the complexity of group management down.

Adding a New Source

SaaS users will need to request new sources via a support ticket.

1. From the Manage Source page clicking on the plus icon next to the page heading.
2. Include the absolute path to the folder being used for the new source. The web server user needs read/write access to this location and should be the user owner.
3. Click 'Save'.

Advanced Source Configuration

Name

The name displayed within your **Hybrid** directory browser if access to more than one source is given. If left blank the Source Path will be displayed.

Show hidden files and folders

Display hidden files and folders for the source. Disabled by default.

Honor the max result setting

When navigating the source, display up to the **Hybrid** set maximum results. If disabled, all results will be displayed (potential performance penalty).

Use the absolute path when displaying file path

If an asset's file path is set to display on the asset details page, include the source's path. If disabled, the asset's path within the source will be displayed. This option is not available on SaaS systems.

Prepend to source path copy

Include text before the asset's copy path. Requires that the path copy function is enabled, and the absolute path is not set to be displayed. Useful for systems using SafeSync as a relative local path to the SafeSync job can be achieved.

Prevent moving or editing of files and folders that have not been synced.

Enable this if you plan on granting access to **Hybrid** sources outside of the **Hybrid** web interface.

Freeze sublevels of the directory browser

Prevent the manipulation of the folder structure within the source. The number set dictates the level of child folders that can't be altered. Useful when blacklisting/whitelisting is in use or when the folder structure is created/maintained outside of **Hybrid**.

Show fields on upload

When uploading to this source, include specific fields on the upload form. This makes it possible to batch tag key fields for the uploaded assets without the need for displaying the full list of fields on a dedicated page.

Show context menu on upload

Enabled the context menu when using the form-based uploader. This allows for the creation of new folders to upload right from the form (if allowed).

Reverse the sort of the following folder levels

A comma separated list of folder levels to use Z-A sorting on rather than the standard A-Z sort. Useful on folder levels that include job numbers or dates, causing the most recent folders are displayed first.

Folder to Field Mappings

JSON formatted mapping of source folders to **Hybrid** fields. The folder's name at the specified level will be placed into the specified **Hybrid** field. Each setting requires the following key -> value pairs:

"match"

The folder path condition. Paths that match the condition will have the containing assets metadata set. All paths are relative to the Source's path.

"field"

The ID for the field to set metadata on.

"level"

The folder level to use as the field data. Level 1 relates to the main set of folders in a source. This setting does not start from the end of the "match" path.

Setting Status with Mapping

Rather than using a field id, the word "access" can be used to signal the setting of an asset's status. Use the "level" key to set the number for the status desired.

1

Open Access

2

Restricted Access

Setting Archive with Mapping

Rather than using a field id, the word "archive" can be used to signal the setting of an asset's archive/workflow state. An additional key "archive" is required and sets the asset to the workflow with the related id. The "level" key is not considered.

Whitelist/Blacklist Max Depth

When setting blacklisting or whitelisting on a source for a group, review the source folders down to the level specified. If set to zero, all folders will be reviewed, which can negatively impact search performance. When possible, set this to as few levels as possible.

Sources and Group Permissions

Please note that once you have created a new source, no groups will have access to it. Groups must be granted access. For further information please refer to the “Sources” section of group permissions.

System Check

Intended for the highest-level administrators, **Hybrid’s** System Check provides useful system information about **Hybrid**. System performance metrics, component versions, and cronjob status are just a few of the things you’ll find here.

To access System Check, click on the Admin360 button -> ‘System Management’ -> ‘System Check’. Here you’ll see a selection of tabs, each with its own Checks. All tabs contain data related to the check and the check’s status. In general, statuses other than blank values or ‘OK’ should be reviewed and resolved.

SaaS systems may not display all checks described in this section. Plugins may include additional checks not covered in this section.

Please note: Data and statuses for CPU Benchmark and Source write speeds are a very rough indicator of performance. Virtualized systems or systems without direct attached storage will likely show a failed status.

General

The general tab focuses on the **Hybrid** version and the hardware running it.

Hybrid version

The major version of **Hybrid** in use. If displayed as a decimal, the minor version of **Hybrid** is to the right of the decimal. Additional information on the build may be found in parenthesis.

Write Access to Filestore

Verification that **Hybrid** can write to the central storage location (where previews and derivatives are kept).

Blocked Browsing of Filestore

Verification that the filestore can’t be browsed from the web.

Memory

Total system memory and the percentage currently in use.

CPUs

Total system CPUs and the total percentage in use (across all CPUs).

CPU Benchmark

Performance of the CPUs against values expected from a system with minimum **Hybrid** requirements met.

Filestore Write Speed

Write performance for central storage against values expected for a system with minimum **Hybrid** requirements met.

<Source Name> Write Speed

Write performance for the source against values expected for a system with minimum **Hybrid** requirements met.

PHP

PHP Version

The version of PHP being used by **Hybrid**.

Configuration File

The PHP configuration file being referenced.

memory_limit

Maximum server memory that can be consumed by a PHP script.

post_max_size

Maximum size of a post request.

upload_max_filesize

Maximum file size allowed when uploading.

PHP Extensions

List of enabled PHP extensions.

Database

MySQL Version

The version of MySQL client being used by **Hybrid**. If MySQL is installed on the same server as **Hybrid** this will also be the server version in use.

Client-encoding

The client encoding value in use.

Last Database Backup

The most recent date **Hybrid** was able to perform a database backup via cron.

Database Size

The current size of the **Hybrid** database.

innodb_buffer_pool_size

The system memory space allowed for innodb buffer.

log_bin

If binary logging is enabled. Unless specifically required this should be disabled, as the function can quickly consume disk space and negatively impacts query performance.

Download MySQL Settings

A link to download a CSV containing all current configuration settings for MySQL.

Asset Processing

GD Version

The version of GD being used by **Hybrid**.

ExifTool

The version of ExifTool being used by **Hybrid**. ExifTool is responsible for metadata extraction and embedding.

FFmpeg

The version of FFmpeg being used by **Hybrid**. FFmpeg is responsible for creating web-based previews and derived asset versions for audio and video files.

Ghostscript

The version of Ghostscript being used by **Hybrid**.

ImageMagick

The version of ImageMagick being used by **Hybrid**. ImageMagick is responsible for creating web-based previews for most assets when libVips is not being used. libVips may also utilized ImageMagick.

Tree

The version of ‘tree’ being used by **Hybrid**.

Unzip

The version of ‘unzip’ being used by **Hybrid**.

Vips

The version of libVips being used by **Hybrid**. libVips is responsible for creating web-based previews for most assets.

EXIF Extension

Whether the exif extension for PHP is enabled.

Php-zip

Whether the zip extension for PHP is enabled.

Cron Scripts

This section includes an additional “Tools” column. Tool options differ depending on the check and can include methods to view assets queued for certain actions or links to clear locks on core **Hybrid** processes.

Cron scripts that have been locked for a prolonged period of time should be reviewed to verify they are still active. If a failure has occurred during the running of the script it may sit in the locked state until the lock is cleared.

Last Cron Run

The date and time the last successful run of cron.php occurred. This cron is responsible for updating relevance search matching, sending report, expiration, and external share reminder emails, updating disk usage, purging of **Hybrid** trash, temp files and unused custom watermarks, updating asset heatmap data, and **Hybrid** backups.

'Offline Jobs' Process Lock

Shows the date and time of the last attempted run of offline_jobs.php, or ‘No Lock Found’ if the last run was successful.
This cron is responsible for processing collection and folder downloads, creating contact sheets, extracting text, exporting metadata, and processing uploads.

Jobs in Offline Queue

Count of offline jobs set to be run.

'Create Previews' Process Lock

Shows the date and time of the last attempted run of create_previews.php, or ‘No Lock Found’ if the last run was successful.

Files in Preview Queue

Count of files requiring previewing.

Failed File Previews

Count of files for which previewing was expected but failed.

'SmartSync' Process Lock

Shows the date and time of the last attempted run of sync_diff.php, or ‘No Lock Found’ if the last run was successful. This cron, in conjunction with sync_diff_ls.php is responsible for ingesting new sources. It can also be used to sync **Hybrid** with source changes made outside of the web interface, however there are limitations on accuracy.

'SafeSync' process lock

Shows the date and time of the last attempted run of the SafeSync processing script, or ‘No Lock Found’ if the last run was successful. This cron is responsible for syncing **Hybrid** with changes made via SafeSync agents.

System Messages

This section lists system generated messages related to **Hybrid** upgrades, user account requests, and expired assets.

To access this section, click on Admin360 -> ‘System Management’ and click on ’System Messages’. The full details of a message can be viewed by clicking on the message content.

System Configuration

The options on this page are system wide and can change some of the functionality available to the users. All options can be found in the **Hybrid** default configuration file, and settings here will take precedence. Some of these options can also be set under user preferences which will take precedence.

To access this section, click on the Admin360 button -> 'System Management' and click on 'System Configuration'. You'll see a set of tabs related to different aspects of **Hybrid**. Any changes made to these settings will be automatically saved.

System Management

Application Name

The name for the **Hybrid** application to be used in emails and displayed in browser tabs.

Email From Address

The email address to be used when sending **Hybrid** system emails.

Email Notify

The email address to be used when notifying of a new user or asset request. Additional groups may also be set for notification via the **Hybrid** configuration file.

Embedded metadata

Whether to extract embedded metadata from assets on upload.

Allow users to request accounts

Exposes a link to request an account to **Hybrid** on the login page.

How often do passwords expire, in days

Interval to roll over user passwords. If using SSO this is ignored.

Terms and conditions for download

Enables a terms and conditions screen before proceeding to download assets. If not accepted, the user will not be able to download the assets.

Terms and conditions on first login

Enables a terms and conditions screen on first login. If not accepted the user will not be able to use **Hybrid.**

Enable **Hybrid** API

Enables API access for **Hybrid**.

Enable IIIF Support

Enables International Image Interoperability Framework (IIIF) support.

User Interface

Application Logo

Upload your own organization's logo to customize the look and feel of your system. The logo is displayed at the top left corner of your screen.

Application Favicon

Upload a small icon to serve as your organization's thumbnail on the browser's tab.

Default Collection Bar Display

Whether the collection bar shows (taking up more space by giving asset previews) or is hidden (taking up less space by giving basic collection info only) by default.

Asset Comments

Enables commenting at the asset level.

Default Upload Sequence

The workflow sequence when using the form uploader. You can either set metadata first then upload the assets or the other way around.

Show "Spotlights" Link

Enables access to "Spotlights" in the **Hybrid** header. This is the only way to see Spotlights.

Metadata Report

Enables the display of the 'Metadata Report' on the asset details page. This report displays the embedded metadata for an asset, the **Hybrid** field the metadata is written to when extracted, and the data that will be embedded in the asset when downloaded.

Search Capability

Default Sort

The default sort for search results.

Default Per Page

The default number of assets to show initially when searching. Additional assets will be loaded as needed.

Default Display

The default search results style to display results data.

Show "Contributed By" on Advanced Search

Include the “Contributed by” filter in Advanced Search.

Show "Media" Section on Advanced Search

Include the “Media” filter in Advanced Search.

Spotlights

Enable Spotlights

Enable “Spotlights” in your system. All additional spotlight-based options require this be enabled.

Show spotlight icons

Enable the display of icons on Spotlight categories.

Show spotlight level names

Enable the display of level on Spotlight categories.

Show dash tile icons

Enable the display of icons on dash tiles.

Show dash tile titles?

Enable the display of titles on dash tiles.

Actions

Enable tasks functionality for all users?

Grants all users across the board tasks functionality. If this is disabled, it can still be enabled based on group permissions.

Show asset requests by default in tasks lists

Include asset requests in the tasks list.

Show editable assets by default in tasks lists

Include all reviewable asset edits in the task list.

Show account requests by default in tasks lists

Include account requests by default in the task list.

Manage Badges

Badges are visual representations of specific field values that are displayed on the search results page. In order for badges to work properly, the field id must be included in the search view display fields array and data join array. Supports dropdown, checklist, radio, dynamic keyword, and expiration date fields. Expiration dates use a dogear badge on the corner of the asset's thumb result.

To view a list of the badges in **Hybrid** click on Admin360 icon -> System -> Manage Badges. You'll see basic information for each field set to allow badges, including the field's title, type, number of badges set, and a list of management tools. You can edit a field's badge setting by selecting 'View' from the tools list.

Manage Badges

Field	Type	Badges	Tools
Expressions	Multiselect Drop Down List	1	
YouTube URL	Text Box (Single Line)	2	
Instagram Handle	Text Box (Single Line)	0	
Expiration Date	Expiration Date	2	
Caption	Text Box (Multi-line)	2	
Notes	Text Box (Multi-line)	0	
Photographer	Dynamic Keywords List	1	
Photographer Name	Drop Down List	1	

Assigning a New Badge

1. From the Manage Badges page, click on the "View' icon for the field you'd like to assign a badge for. If you do not see the field listed, please edit the field, and enable badges.
2. Click the plus icon next to the page heading. If the plus icon is not visible, then all possible field values have had a badge assigned.
3. If adding a badge to an expiration date field, select the color for the dogear. Otherwise, select the desired field value to set the badge on. This will expose additional options.
4. For expiration dates:
    a. Add a number to 'Within # days til expired'. Use a positive number to create a badge for assets nearing expiration. Use '0' to create a badge for an asset that's expired. Use negative numbers to create a badge for assets past expiration.
5. For other badge fields:
    a. Select the method for providing the icon type. The 'Library' option uses a predefined set of icons. If you'd rather use a badge, you've created or selected yourself, use the 'Custom' option.
    b. Select your badge icon. If using the library icons, click the 'Show Library' button. Scroll through the icons or use the search to filter down the available icons and click on the one you'd like to use. If using a custom icon, upload the icon file.
6. Click 'Save'

Advanced Badge Configuration

Hover Text

Hybrid automatically generates hover text for non-date fields based on the field title and the selected field option. For expiration badges it is recommended that you use a format that verbally represents the number of days specified.
Example: ‘Assets expiring within 30 days’.

Show days till expired

For expiration badges, include the number of days left til expiration, or the number of days since expiration, in the dogear.

Icon Library

If using **Hybrid’s** icon library, you have the option to select a color for the badge. Click on the color swatch to select a color via the color picker.