



DWS

Dynamic Workflow Solutions



Hybrid 4.0 User Manual



FLEXIBLE & FUNCTIONAL

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



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.



TARGET & TAILOR

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



HYBRID

by
Dynamic Workflow Solutions, Inc.



INTELLIGENT WORKFLOWS

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



CONFIDENCE & SECURITY

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



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: 3/8/2024

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What is Hybrid?

HYBRID is a public safety grade 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 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 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

Brand Awareness

With **HYBRID** you can share your visual content with production teams, marketing teams, and clients. Increasing brand awareness and consistency

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

No License Limitations

Single server unlimited users

Logging into Hybrid

Once the user is provided a username and password by the administrator, they can begin their **HYBRID** experience. Enter the **username** and **password** and click **Log in**.



Log in or [Request an Account](#)

mcowan

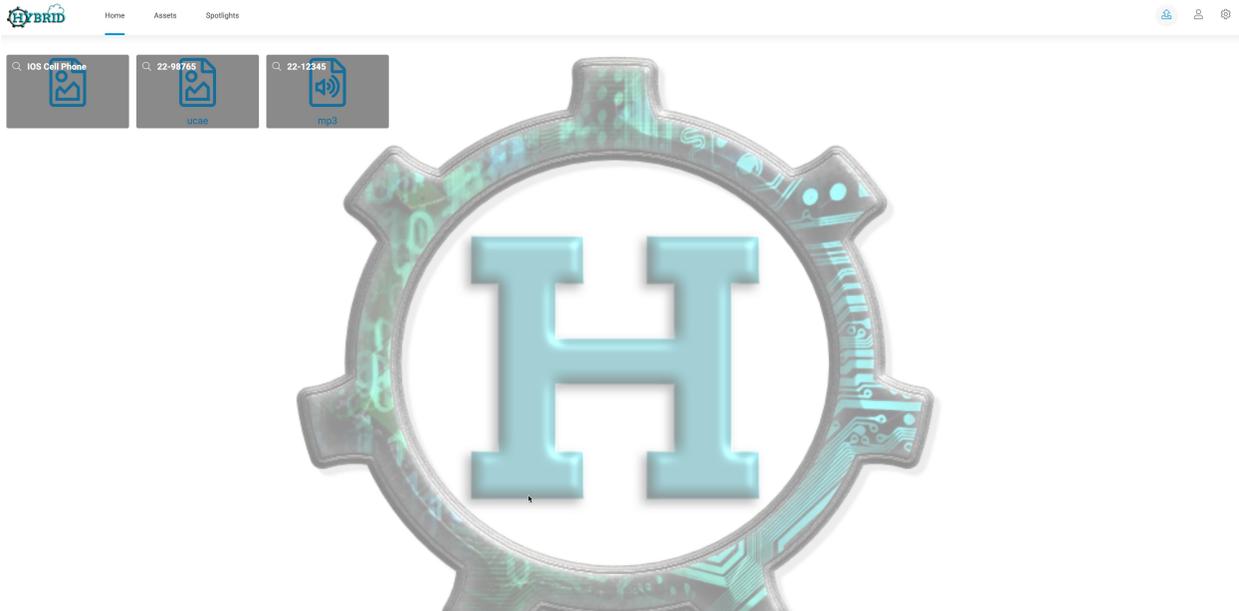
.....

Remember Username

[Log in](#)

[Forgot your password?](#)

You will then see a home screen much like the one below.

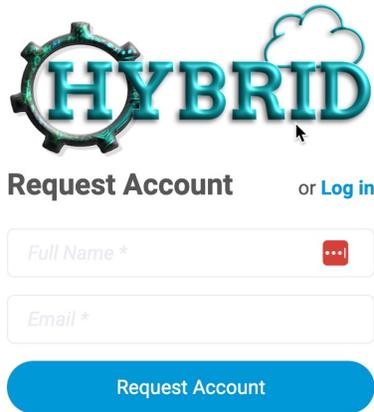


Request an Account

If configured, people can request accounts from the **HYBRID** login page.

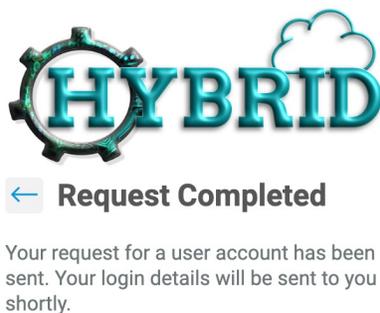
Should you need to request for an account on **HYBRID** here are the following steps you may follow:

1. In the login page, you may click on the “Request an Account” button above the login area.



The screenshot shows the HYBRID logo at the top, which consists of the word 'HYBRID' in a stylized, teal, blocky font. The 'H' is integrated with a gear icon, and the 'I' is integrated with a cloud icon. Below the logo, there are two options: 'Request Account' and 'or Log in'. The 'Request Account' option is highlighted. Below these options are two input fields: 'Full Name *' and 'Email *'. The 'Full Name *' field has a red eye icon to its right, indicating it is a password field. Below the input fields is a blue button labeled 'Request Account'.

2. You will be asked to provide an email address and your name and click “Request Account”.
3. You will be given a confirmation that the account has been requested along with a confirmation email sent to the email address you have provided. Your account will have to be approved by your system’s administrator.



4. Once approved by your administrator, you will be sent another confirmation email along with a temporary login link so you may set up your account’s password.
5. After setting up your password, your system might ask you to agree on a Terms and Conditions of use to proceed.

Forgot Password

Should you forget your password, Forgot Password allows you to have your password reset.

To do so, in the login page > click on forgot password > enter your email address and you will be sent a password reset email.



← Reset Your Password

Enter the email you're using for your account

Send Reset Email

Menu Bar

The Menu bar sits at the top of the screen and is the main source of navigating around HYBRID.



Home

Assets

Spotlights

Home

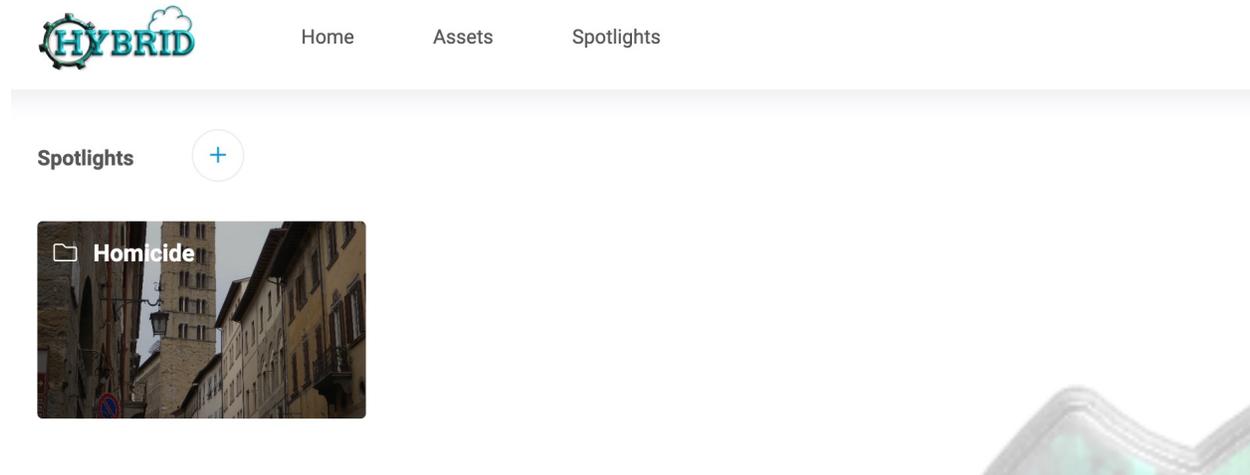
Clicking home will take you to the home page (often called the dash tile page). This is typically the screen you first see when you log into **HYBRID**. Consequently, you can also click on the logo directly to the left of the left of the Home button and it will have the same result.

Assets

HYBRID now uses a directory browser that mimics your file structure on your server. Quickly navigate through folders and files to find exactly what you need.

Spotlights

Spotlights are a compilation of assets that has been promoted to be featured for all users. The Spotlights can be set up to automatically mimic the file system, or just created manually. The + (plus) button allows a user to create new Spotlights upon demand.



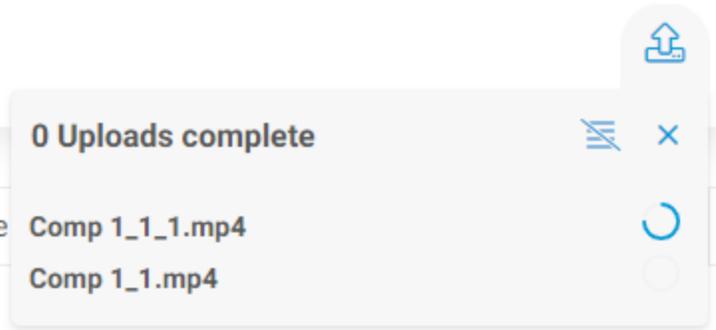
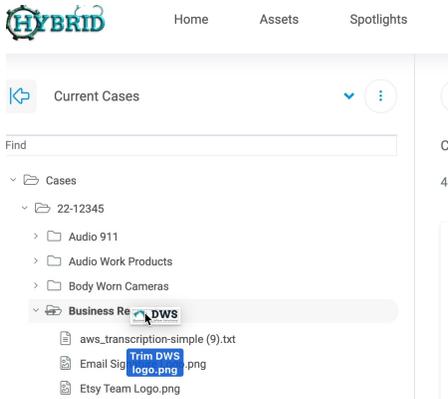
Recently Added

With one click you can see the last 1000 assets that were recently added to the system (in order of most recent first). This is an effective tool if you want to see some of the freshest assets ingested.

Upload

Listed below are different methods you can use to upload your assets

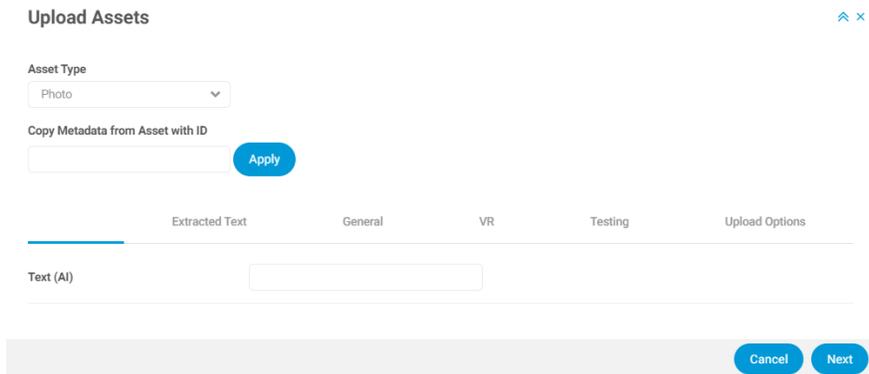
1. **Drag and Drop** - You can upload assets using this method by simply dragging and dropping your assets to your desired folder which is located at the leftmost section of the page. You can then track your upload progress on the upload bar located at the top right corner of the page. Please bear in mind that when uploading through this method, you are only able to add metadata manually once the upload has finished.



2. **Upload Button.** Located on the top right corner, you may click on the upload button to bring up the upload menu



2.1. Within the upload menu, you will first be asked to enter your metadata for your assets as well as selecting the asset type that you will be uploading.

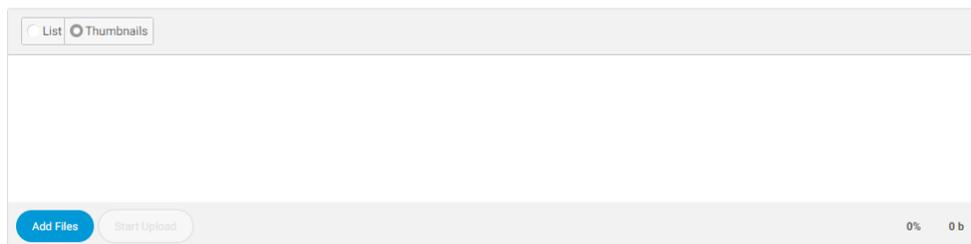


2.2. After the metadata fields, you can now either drag and drop your files in the upload area or manually select your files by clicking on “Add Files”.

2.3.

Upload Assets:

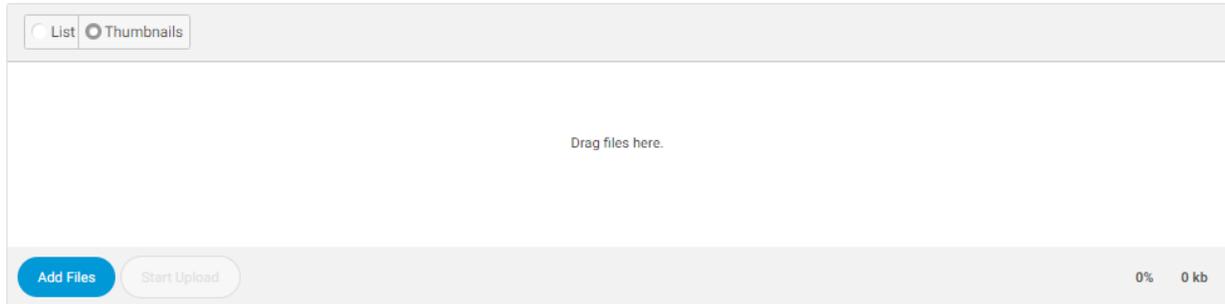
Select the desired source and folder to upload this material to.



3.1. Click on “Upload to Folder” to bring up the Metadata fields and Upload Menu.

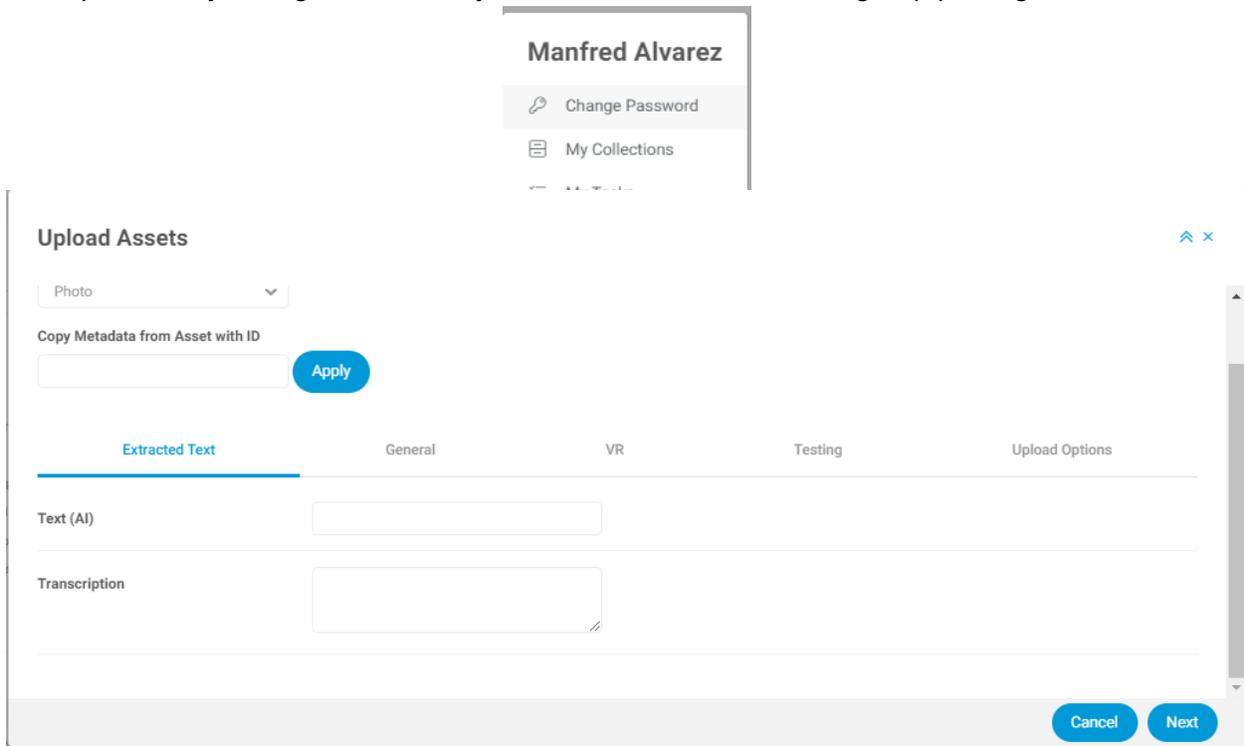
Upload Assets: Designs

Select the desired source and folder to upload this material to.



User Menu

The user menu provides navigation to various management areas that users may find useful. The options may change dramatically from user to user based on group privileges.



This option gives you an expanded view of your current collections and the actions you wish to perform on your collections.

Manage Collections

Show 15 ▾

Total: 4 Collections (4 owned by you)

Delete Selected

<input type="checkbox"/>	Collection	Owner	Created ↑	Items	Access	Show
<input type="checkbox"/>	My Collection	Manfred Alvarez	September 30, 2022 @ 12:20 am	6	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	Smart canyon	Manfred Alvarez	September 30, 2022 @ 1:13 am	21	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	test	Manfred Alvarez	October 11, 2022 @ 8:54 pm	24	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	/test	Manfred Alvarez	October 18, 2022 @ 9:07 pm	24	Private	<input checked="" type="checkbox"/> ⋮

My Tasks

A feature within **HYBRID** that lists tasks assigned to you by your colleagues within the system.

My Tasks

Show 15 ▾

Total Tasks: 13

Delete Selected

<input type="checkbox"/>	Date ↓	User	Type	Description	Tools
<input type="checkbox"/>	October 4, 2022 @ 9:38 pm		Message	The User Login Request form has been completed with an existing email address and the following details: Name: manfred alvarez Email: wraithrevere@gmail.com Comment: IP Address: '49.148.185.25'	
	November 14, 2019 @ 11:24 pm	Scott Comboni	Asset Review	IMG_2281.jpg	
	November 14, 2019 @ 4:34 am	Test User	Asset Request	more testing	
	November 8, 2019 @ 10:59 pm	Test User	Asset Request	sfgsdfgsdfg	
	November 8, 2019 @		Asset	sfgsdfgsdfg	

My Dash

This option allows you to manage all of your dash tiles. See the section on dash tiles for more information.

My Dash

Show Tile	Title	Text	Asset Count	Show Title	Show Icon	Tools
<input type="checkbox"/>	Spotlights		No	Yes	Yes	
<input checked="" type="checkbox"/>	dash tile tes		Yes	Yes	Yes	
<input checked="" type="checkbox"/>	Spotlights		No	Yes	Yes	
<input checked="" type="checkbox"/>	My Collections		No	Yes	Yes	
<input checked="" type="checkbox"/>	Test456		No	Yes	Yes	

My External Shares

A master list of external shares created by you. See the section on Sharing for more information

My Preferences

This section allows you to personalize settings that are applicable to your profile.

Update Avatar

Clicking on this link lets you upload an image to be your avatar. Images must not be smaller than 50x50 pixels and no larger than 200x200 pixels and the image should not exceed 1mb.

Results Display

These settings in this section pertain to how results are displayed when searching.

Default Sort - determines how search results are sorted. You may choose between, search relevance, color (the asset's color profile), Asset ID, Original Filename, date created, and file size.

Default Per Page - This allows you to choose how many items will be displayed on the search by default.

Asset view modal - This lets you choose if viewing an asset opens a popup or views it full screen.

User Interface

This lets you customize settings related to your space's UI.

Default Collection bar display - lets you decide if you wish to display asset thumbnails in the the collection bar.

Upload Sequence - Allows you to choose which upload sequence works best for your environment (upload first then add metadata or metadata first then upload later).

Keyboard navigation - you may enable this to navigate **HYBRID** with your Keyboard.

Use decimal for file sizes - lets you choose if decimal file sizes are being displayed instead for binary file sizes.

Email

In this section are settings related to **HYBRID** emails.

CC me when sending assets and collections - Enabling this CC's you when you externally share assets via email.

Send me emails instead of system notifications where possible - Enabling this sends you system emails instead of notifications within **HYBRID**.

Send me emails in addition to system notifications - Enabling this allows you to both receive system notifications and emails.

Send me a daily email with all unread notifications from the last 24 hours - Enabling this sends you email notifications should you have unread system notifications within the last 24 hours.

Mark messages as read once I have been sent the summary email - Related to the previous setting, if enabled, your system notifications will be marked as read when you have been sent the summary email.

My Messages

Settings in this section pertains to system notifications and messages.

Show me system notifications on screen as they are received. If disabled, the counter will still update to indicate the presence of new messages - When enabled, system notifications will pop up onscreen.

Send me asset messages about asset management e.g. asset state changes, metadata changes - When enabled, **HYBRID** will send you notifications for changes in your assets.

Send me messages about important system events e.g. low disk space. - If enabled, **HYBRID** sends you notifications for vital events in your system.

Send me user administration messages e.g. new user account requests - If enabled, admin related messages will be sent to you.

Send me messages about asset access e.g. asset requests - When enabled, you'll be sent messages for Asset requests.

My Tasks

Settings in this section pertains to your tasks within **HYBRID**

Show asset requests in my tasks list - Enabling this shows open asset requests in your tasks

Show user account requests in my tasks list - Enabling this shows open account requests in your tasks

Show me editable tasks in my tasks list - Enabling this shows editable tasks in your list

Editable assets in the following states will be shown - This lets you choose which editable asset states will be displayed

Do not show editable assets of the following types - This lets you select which editable asset types will not be shown.

Show task links - This option shows task links for easy navigation for the said tasks.

Watched Searches

This keeps a list of all watched searches and their results within **HYBRID**. To watch a search, simply click on the three-dot menu button then click on watch search.

SafeSync Jobs

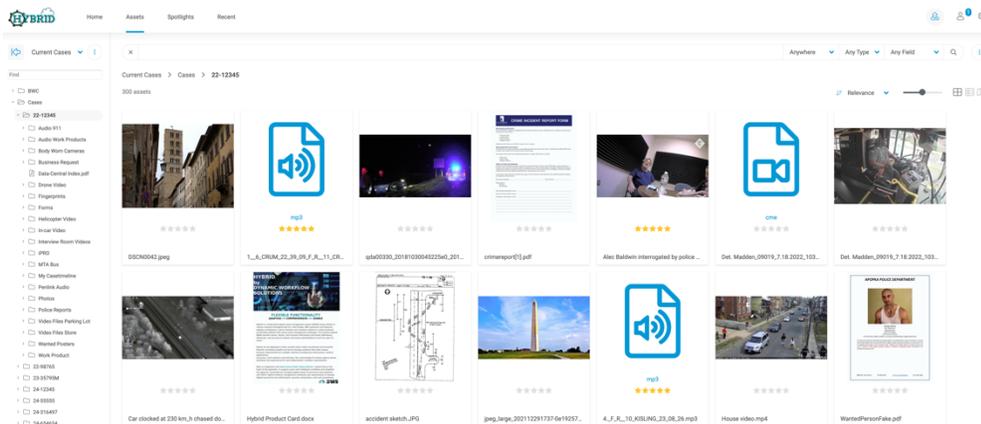
This lists all of your active tasks for SafeSync.

Log Out

Logs you out of **HYBRID**.

Admin360 Menu

The Admin360 menu provides access to various administrative areas within **HYBRID**. For detailed information about administrating **HYBRID** please refer to the Administration manual.



Collection Bar

Shows you all collection related information and available actions for collections

Collection Actions

The collection bar is the section of the page wherein all of your collections can be navigated, and actions associated to it. It is displayed on the bottom part of the page, it is displayed by default, but you can minimize it by clicking the arrows at the rightmost part. Additionally, clicking on the collection bar tools button pulls up a set of different actions you can use for your collections.

ⓘ Cases/22-12345 ▼ 300 items
 

- ⓘ Edit Collection
- + Create Dash Tile
- ⦿ Spotlight Collection
- ↓ Download Collection
- 📄 Contact Sheet
- 🔗 Share Collection
- 🗑️ Delete Collection
- 🕒 View Log
- 🔍 View Assets

Edit Collection

This allows the edit of the collection itself, and although it does allow for the keywords to be attached to all assets in the collection, bulk metadata editing is not done under this selection. Edit collection is also where you can attach users or groups to a collection and change it from Private to Public as well as other features.

Edit Collection ⬆️ ✕

Name ⋮

Access ▼

Attached Users +

Related Keywords

Promote on the home page? [🔗 Create Dash Tile](#)

Allow other users to add/remove assets

Relate all assets in this collection

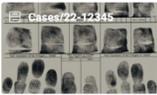
Copy from collection ▼

[Save](#)

Create Dash Tile

This feature allows you to create your collection into a dash tile to be featured on the homepage

Create Dash Tile ⤴ ×

Preview 

Title

Text

Tile Style Single Blank

Asset Count

Custom Image Upload

Tile Image

Display Title Show Hide

Display Icon Show Hide

Visible To Me Everyone Group(s)

Spotlight Collection

This allows the user to add a collection into existing or a new spotlight in the “Spotlights” tab.

Spotlight Collection: Cases/22-12345

Spotlight Category

OR: Enter a new category...

- ✓ Select
- Homicide
- Missing persons
- Most Wanted

Download Collection

This allows the user to download all assets and metadata contained in the collection.

Download Collection ⤴ ×

Size

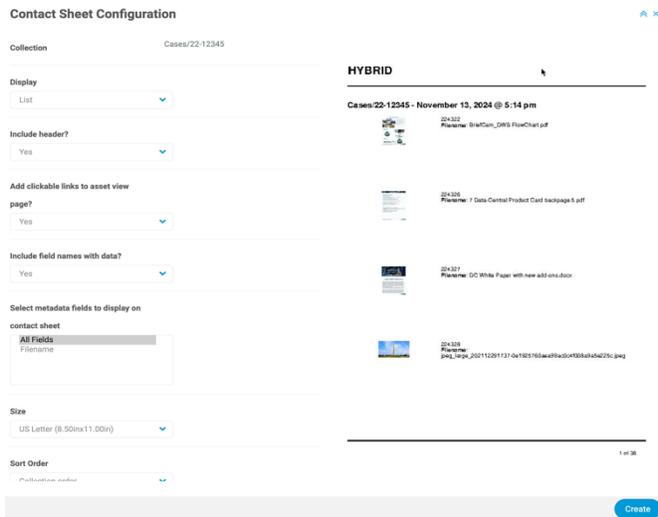
- ✓ Original (299 of 300 are available)
- High resolution print (7 of 300 are available)
- Low resolution print (26 of 300 are available)
- Social Media (151 of 300 are available)

Fallback to Original Size
(299 of 300 are available)

Include Metadata CSV File

Contact Sheet

This tool allows the user to create a PDF contact sheet of all assets contained in the collection including previews and metadata.



Share Collection

This allows the user to share the collection’s assets both internally and externally. It can be shared via email and generating and external URL.

Share Collection

[Email Collection](#) [Generate URL](#)

Internal User Sharing

Attached Users

No attached users.

[Edit](#)

External User Sharing

Currently not being shared

Delete Collection

Allows the user to delete the collection should they wish (this depends on the user’s permission). Do keep in mind that this only deletes the collection and not the assets.

View Log

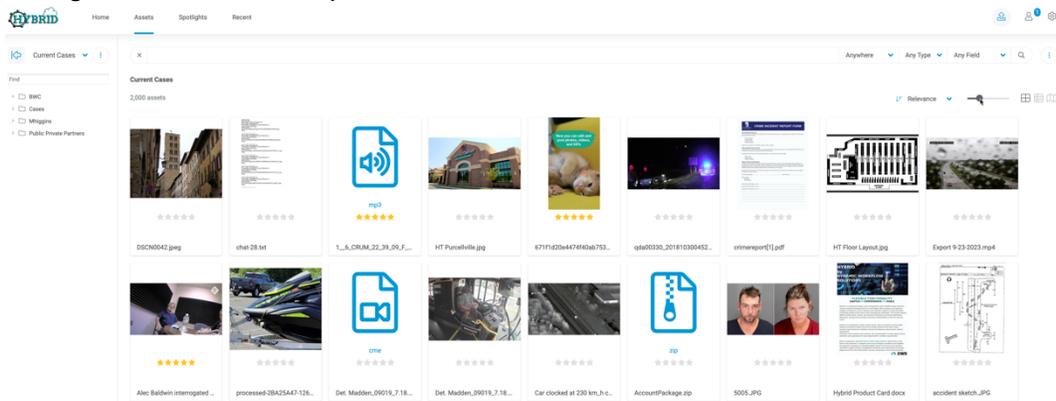
Allows the user to view the history of all actions done within the collection, this includes downloads, added assets in the collection, assets removed, etc.

Collection Log: Cases/22-12345

Date	User	Action	Asset
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	BriefCam_DWS FlowChart.pdf
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	7 Data-Central Product Card backpage 5.pdf
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	DC White Paper with new add-ons.docx
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	jpeg_large_202112291737-0e1925760ae99ac0c4f008a9a5e225c.jpeg
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	download.jpeg
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	Canon_40D.jpeg
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	DSCN0027.jpeg
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	DSCN0042.jpeg
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	WantedPersonFake.pdf
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	WantedVehicleFake.pdf
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	Alec Baldwin interrogated by police hours after Rust set shooting.mp4
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	Y2Mate.is - Full Alex Cox interview with police-m1DEID0j0Gy720p-1655244948898.mp4
November 4, 2024 @ 2:15 pm	Miles Cowan	Added asset	Y2Mate.is - Retired Phoenix Police officer Jason Mow interviewed in connection to Lori Vallo case-Tghz2N7z1q-720p-1656661930398.mp4

View Assets

This gives the user an expanded view of the assets in the collection via the asset directory.



Edit Assets

Not to be confused with edit collection, this tool allows the bulk editing of metadata and other relevant information of all assets within the collection.

Edit Multiple Assets: 9 assets selected

Asset Type: Status:
 Copy Metadata from Asset with ID: Access:

General Extracted Text Asset Data A.I. **Case Info** 3PS LEA Data

Case Number:
 Title:
 Suspect Last Name:
 Suspect First Name:
 Address:

Trash Assets

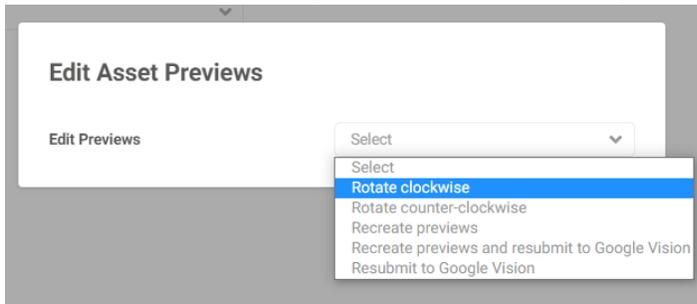
Compared to “delete collection” this feature deletes the assets instead of the collection and sends them to the trash. Access to this feature will also depend on their permission.

Remove Assets

This on the other hand removes the assets from the collection but it does not send the assets to trash.

Edit Previews

This tool allows you to edit the previews for the assets within the collection. Actions made in this tool do not affect the original assets within the system.



Disk Space Used

This tool allows you to check the total space the assets within the collection has consumed in the system.

Disk Space Used: Cases/22-12345

Assets 300

Disk Usage 5.1 GiB

Export Results Metadata

This tool allows the user to download a summary of all the metadata for the assets within the collection.

Export Results Metadata

Only include data from fields expected to contain personal data

Include data from all accessible fields e.g. contain technical metadata and detailed file information

[Download](#)

Hide Collection

This tool hides a selected collection from the collection bar's list of collections. To bring back the collection in the bar, all you have to do is click on your profile, then click "My Collections" and make sure the "Show" checkbox is checked for the collection.

Total: 4 Collections (4 owned by you)

[Delete Selected](#)

<input type="checkbox"/>	Collection	Owner	Created ↑	Items	Access	Show
<input type="checkbox"/>	My Collection	Manfred Alvarez	September 30, 2022 @ 12:20 am	6	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	Smart: canyon	Manfred Alvarez	September 30, 2022 @ 1:13 am	21	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	test	Manfred Alvarez	October 11, 2022 @ 8:54 pm	24	Private	<input checked="" type="checkbox"/> ⋮
<input type="checkbox"/>	/test	Manfred Alvarez	October 18, 2022 @ 9:07 pm	24	Private	<input checked="" type="checkbox"/> ⋮

Home

Your home page is a location to display your dash tiles. Dash tiles can be made by you, shared by others, or curated by Admins.

Assets

The Assets area is where you can browse within Sources and their directories or search using keywords.

Searching

Searching is easy in **HYBRID** and provides you with options to optimize the search even further. Search Bar

Anywhere Any Type Any Field

We've utilized the space of **HYBRID** in a more efficient way by moving the search bar to the top while keeping all of the functionality and taking up less space to optimize your searching experience.

Filters

Filters are one of the ways you can optimize your search for assets within **HYBRID**. Listed below are filters you may use in search.

Location

Determines where the search will occur (anywhere, current folder, central storage)

Asset Type

Determines which asset type will be searched

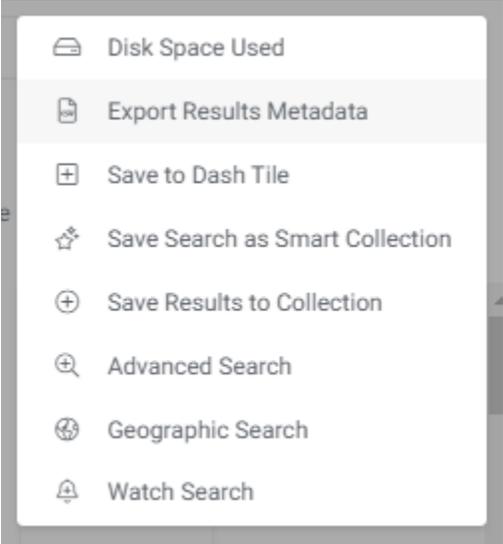
Field

Filters search results based on the chosen metadata field.

Search Actions

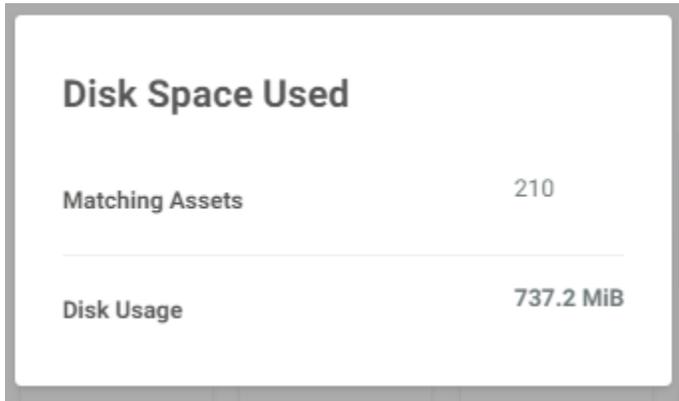
When doing a search, looking at the most recently added or browsing in the Directory Browser, there are several actions that can be taken to enhance your experience and complete your workflow.

Click the vertical dots to the right of the search bar to expose a list of actions you can perform on the current results set. Additionally, access to the Advanced Search and Geographic Search can be found in this menu.



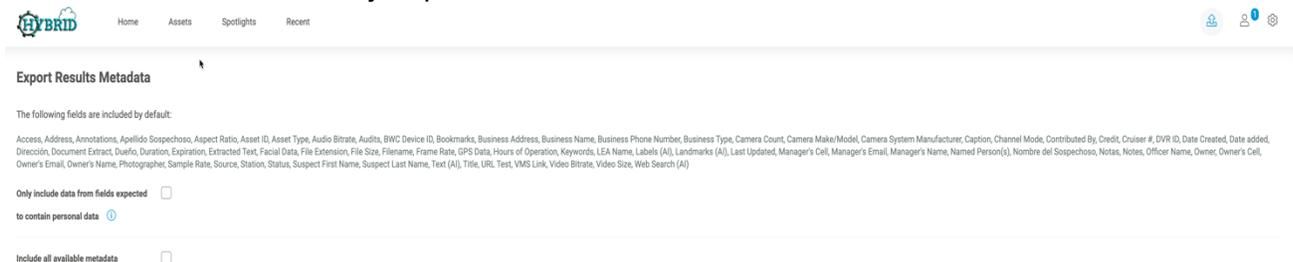
Disk Space Used

Calculates the total storage space the results set consumes. The value includes spaced needed for the asset's file, previews, derived assets, and alternatives.



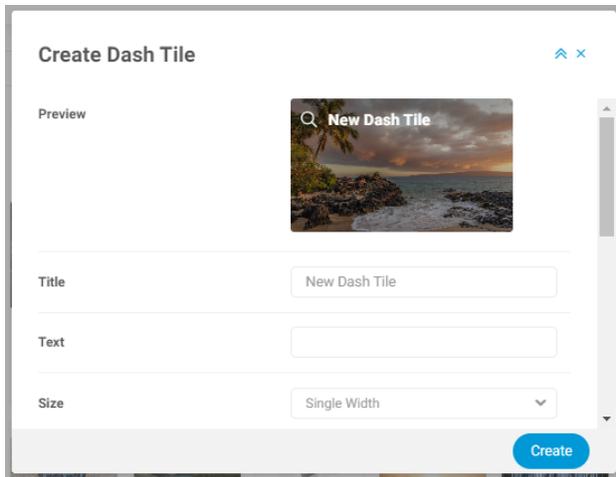
Export Results Metadata

Quickly create a CSV file and save it to your desktop by selecting this option. It will allow you to download all information, or just personal information in the asset



Save to Dash Tile

A user can save their search results to the dash tile (home page) for quick retrieval. Simply click the Save to dash tile button in the action dropdown and fill out the needed fields. Options may vary from the image below depending on user/group privileges.



Save Search as Smart Collection

A smart collection is a group of assets that can grow based on a set of variables. Example: You can do a search for “coffee” and “cafe” - save that search as a smart collection. As assets are added that have the metadata “coffee” and “cafe”, they will automatically be added to the smart collection.



Save Results to Collection

The user can save all of the results from a search to the current open collection by selecting “Save results to collection.” Note: Large results can take a while to save to a collection. As a best practice, we suggest keeping the saved results to under 100 unless it is needed.

Advanced Search

This lets you do a more refined and more customized search. Filters include asset ID, contributor, asset type, status and metadata fields.

Geographic Search

This allows the user to search geotagged files depending which locations the assets are tagged in. When using this feature, it displays a map, and the assets associated with a location.

Geographic Search

Drag to select a search area

pan select search area



Watch Search

A user can create a watched search, or many, so they can quickly see how many assets appear in the search, or to retrieve the search quickly. The watched search is under the user icon. It can be edited or deleted at any time.

Any updates to the watched search will automatically send an email to the user who initiated the search watch.

How to watch a search:

- Enter your search item
- Select where the search watch would be conducted (Anywhere / Current Folder / Central Storage)
- Select which asset type to watch for
- Select which Metadata field to watch
- On the search action menu, click on 'Watch Search'
- Any updates to the watched search will automatically send an email to the user who initiated the search watch.

Watched Searches

Show

Show All Watched Searches

Created	Name	Title	Last Found	Enabled	Tools
September 1, 2023 @ 11:29 am	Miles Cowan	<h1 class="searchcrumbs">Geographic Search</h1>	0	Yes	Q, ⌵
January 22, 2024 @ 7:02 pm	Miles Cowan	Current Cases/Public Private Partners	56	Yes	Q, ⌵

Advanced Search

By clicking on the menu icon to the right of the search bar, you can create far more direct and verbose searches using metadata fields, asset types, status of the assets and other criteria.

Advanced Search

All Fields

Asset ID(s)

Contributed By +

Asset Types Photo Document Video Audio Font Archive Coding 3D Photographers Stock Bios Public

Status Pending Submission Pending Review Active Pending Archive Archived

Video Data General Extracted Text Asset Data CMS Workflow Photographer CLT A.I. Asset Filtering Manfred Media

Geographic Search

The geographic search allows you to search assets based on where the asset’s location is tagged in.

To access the geographic search, click on the three-dot menu button beside the search bar then click on ‘geographic search’. This will bring up a map that you may navigate through to see where assets are located.

Sidebar

The sidebar allows you to choose between different sources that are available in your space, the asset directory, and use faceted search

Faceted Search

Faceted search lets you search assets based on their metadata.

To access the faceted search, click on the three-dot menu on the side bar and click on ‘faceted search’, this will filter assets with their associated metadata. Click on the checkbox to display the assets.

Directory Browser

The directory browser is designed to mimic the file explorer on your desktop’s storage.

Additional settings for the directory browser include the following:

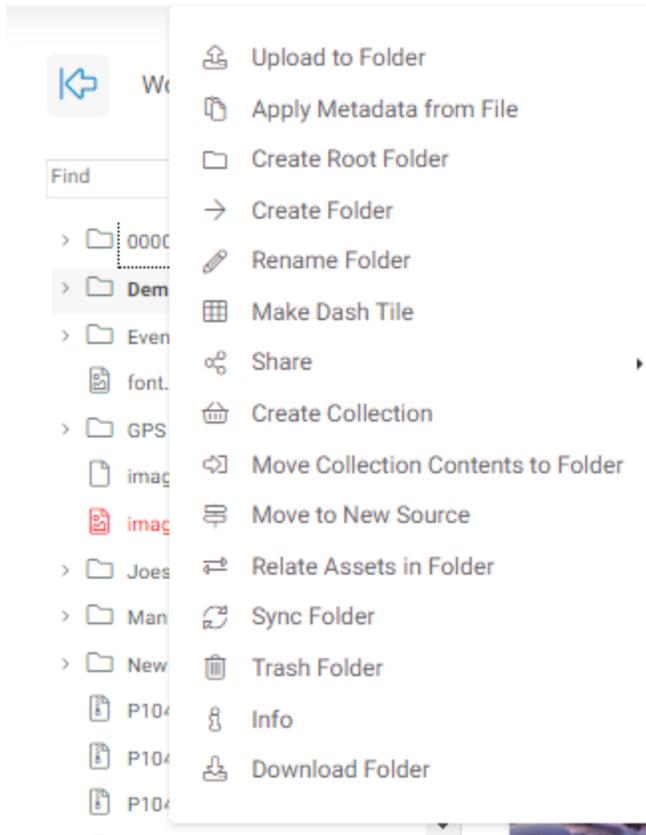
Show files in folders - enabling this setting shows the files within the folders once you click the folder dropdown

Show folder filter - enabling this setting displays a search bar that will let you search for specific folders within **HYBRID**.

Folder & File Actions

Right clicking on the folder (or file) name (not the icon) will open a menu of actions that are possible in the Directory Browser. Note: Actions listed may differ from your user experience based on group privileges.

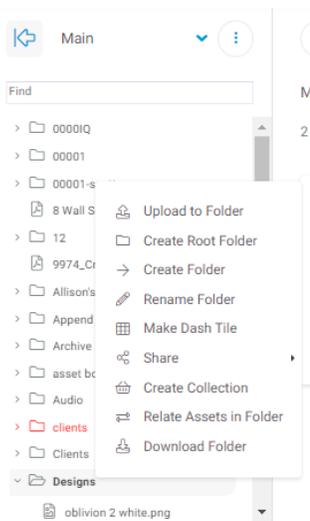
The screenshot shows a dialog box titled "Upload Assets" with a close button (x) in the top right corner. At the top left, there is a dropdown menu currently set to "Photo". Below this, the text "Copy Metadata from Asset with ID" is followed by an empty input field and a blue "Apply" button. A horizontal tab bar is located below the input field, with five tabs: "Extracted Text" (which is selected and underlined in blue), "General", "VR", "Testing", and "Upload Options". Under the "Extracted Text" tab, there are two input fields: "Text (AI)" and "Transcription". At the bottom right of the dialog, there are two blue buttons: "Cancel" and "Next".



Upload To Folder

This will allow you to upload directly to a desired folder by following these steps:

1. On the left side of the page, right click on your desired folder to bring up the options for the folder.

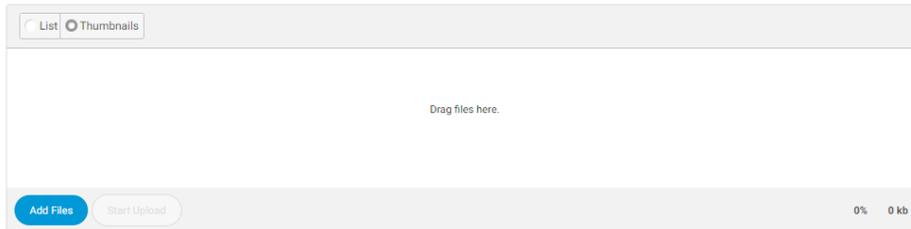


2. Click on "Upload to Folder" to bring up the Metadata fields menu so you may add your desired metadata for the upload

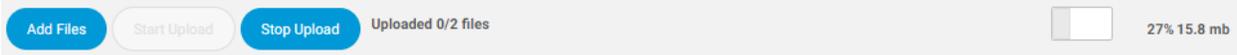
- Once you've completed adding your metadata, you may proceed with adding files to your upload. You may opt to drag and drop the files into the upload area or by clicking on "Add Files". Click on "Start Upload" to begin

Upload Assets: Designs

Select the desired source and folder to upload this material to.



- You can track the upload progress on the bottom of the upload area in the form of percentages.



Apply Metadata from File

Using a specified template, it is possible to upload a CSV file to upload metadata directly to the assets. If such uploading is necessary, reach out to **Dynamic Workflow Solutions** for the CSV metadata template needed to complete this action.

Create Root Folder

This will create a new folder at the root / index level of the folder structure. It will be labeled as Untitled Folder until it is renamed

Rename Folder/ File

New folders are created as Untitled Folder, right click on the folder to rename and title them as needed. Clicking enter will save the change and will rename the folder back to the file directory on the server. The same can be done for a file in the directory tree.

Make Dash Tile

Quickly and easily create a bookmark to a frequently used folder in the directory browser by selecting Make Dash Tile. This will place the tile on the home page for your own user, a specified group, or all users (if permissions allow).

Create Dash Tile



Preview



Title

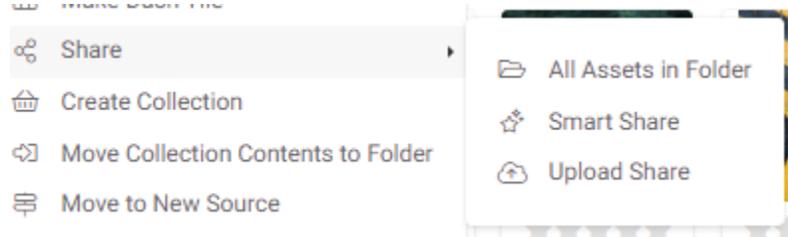
Text

Tile Style

Single Blank

Share

Opens options on how you can share your files and folders both internally and externally.



Create Collection

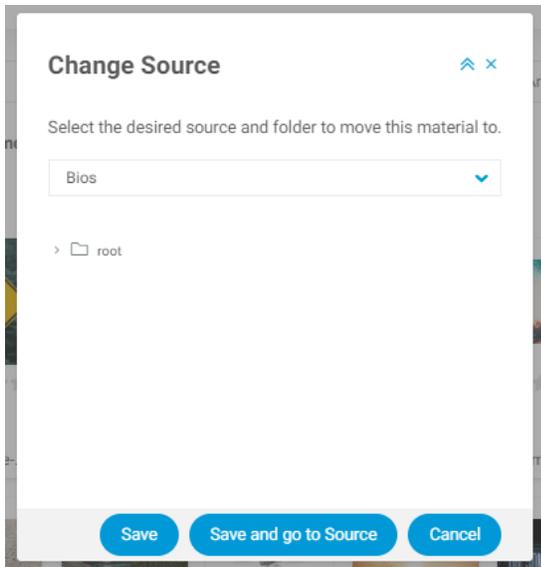
This adds all assets within the folder into a collection which can easily be accessed on the collection which is located at the bottom portion of the page.

Move Collection Contents to Folder

An entire collection can be moved out of any location and relocated to a new folder with this option. Drop assets into a collection, select the folder, and select Move Collection Contents to a Folder.

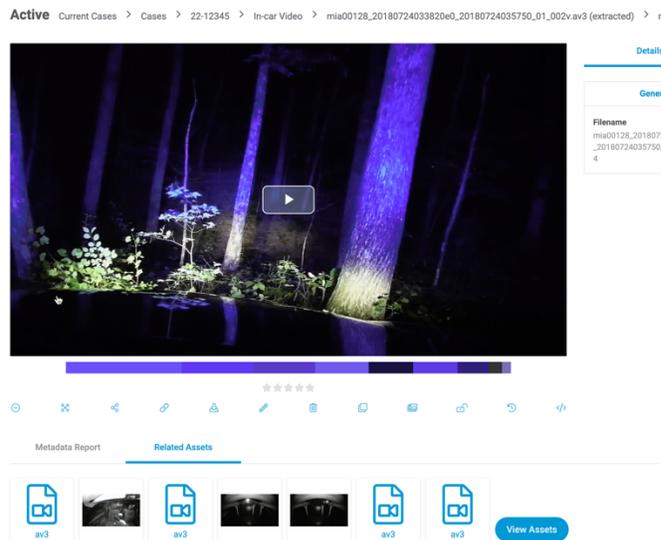
Move to New Source

This option allows you to migrate a folder from one source to another.



Relate Assets in Folder

Selecting Relate Assets in Folders binds all of the assets together. Inside the View of each asset, scroll to the bottom to see the Related Assets.



Sync Folder / File

If a folder becomes out of sync with the folder that lives on the server, a user can click Sync folder. Note: this should only be done by an Admin and only if necessary. The same can be done for a single file that is out of sync. While the folder/file is syncing, you will see a spinning ball - you may work other places i the directory browser as this commences.

Trash Folder / File

This opens a prompt to send the files or folders in the trash. Assets in the trash can still be retrieved or can be deleted permanently. Please note that not all user groups have the ability to delete files nor access trashed files

Download Folder / File

Right click and select Download Folder (or file) and it will quickly compress and download the folder to your selected destination in your browser. Files will not compress, just instantly download.

Collections

Collections give you the ability to bring assets together for any number of reasons. Collections can be private or public, and public collections can be categorized using Spotlights. Collections can be manually curated or be based on search terms (Smart Collections).

Collection Types

Private Collections

Collections under this category can only be accessed by the owner. Collections are set as private by default

Public Collections

Public Collections on the other hand can be accessed by other users across your system.

To change a collection into Public, head to the collection bar> click on the three-dot menu > click on edit collection> set access to public

Spotlights

Spotlights are an easy way to pin assets, folders, and collections to a publicly accessible location.

Smart Collections

A Smart Collection allows collections to grow on an organic level. As users update metadata, the collection will automatically add assets based on triggers set up by you.

Creating Collections

From Upload

You can create a collection by entering a name in the “Collection Name” field, or upload to a current collection in the drop down and select Next.

Upload Assets ⤴ ×

Extracted Text	General	VR	Testing	Upload Options
Don't Extract Embedded Metadata	<input type="checkbox"/>			
Relate All Assets on Upload	<input type="checkbox"/>			
Autorotate Images	<input checked="" type="checkbox"/>			

Cancel Next

All assets from the uploaded batch will be entered into the collection upon completion of the upload.

From the Collection Bar

Often times while browsing a user will want to gather assets together to download, edit metadata, or various other functions. This can be done easily in **HYBRID**.

In the collection bar below, select (Create new collection), give it a name and click enter/return. We will title it Today's Collection for demonstration.

New Collection ⌵ ✕

Name

Access Private ▼

Attached Users +

Related Keywords

Promote on the home page? [Create Dash Tile](#)

Allow other users to add/remove assets

Copy from collection Do not copy from a collection ▼

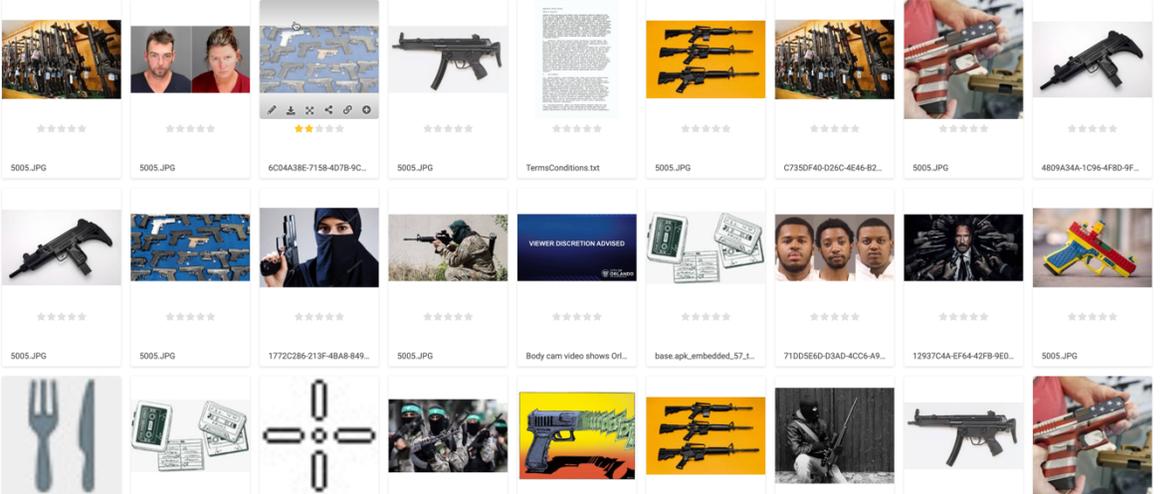
Save

From Search Terms

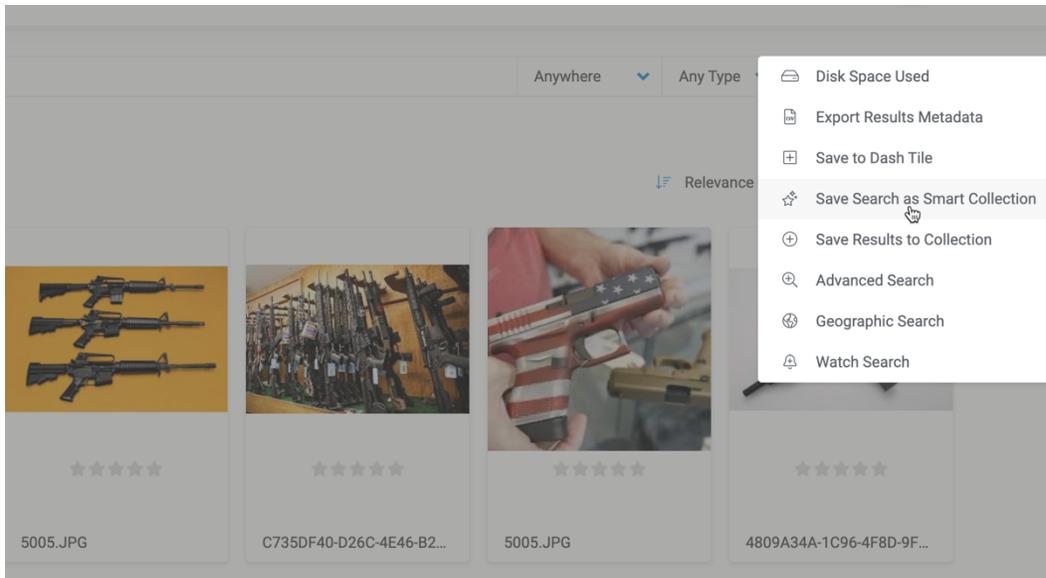
Conduct a search based on the triggers you want set in your collection - for example - we did a search for “gun”. Because this is such a general search and not setting it to any specific fields, any asset that has “gun” in as a term, a file name, or anywhere in the searchable text, it will appear.

Gun Anywhere Any Type Any Field Q

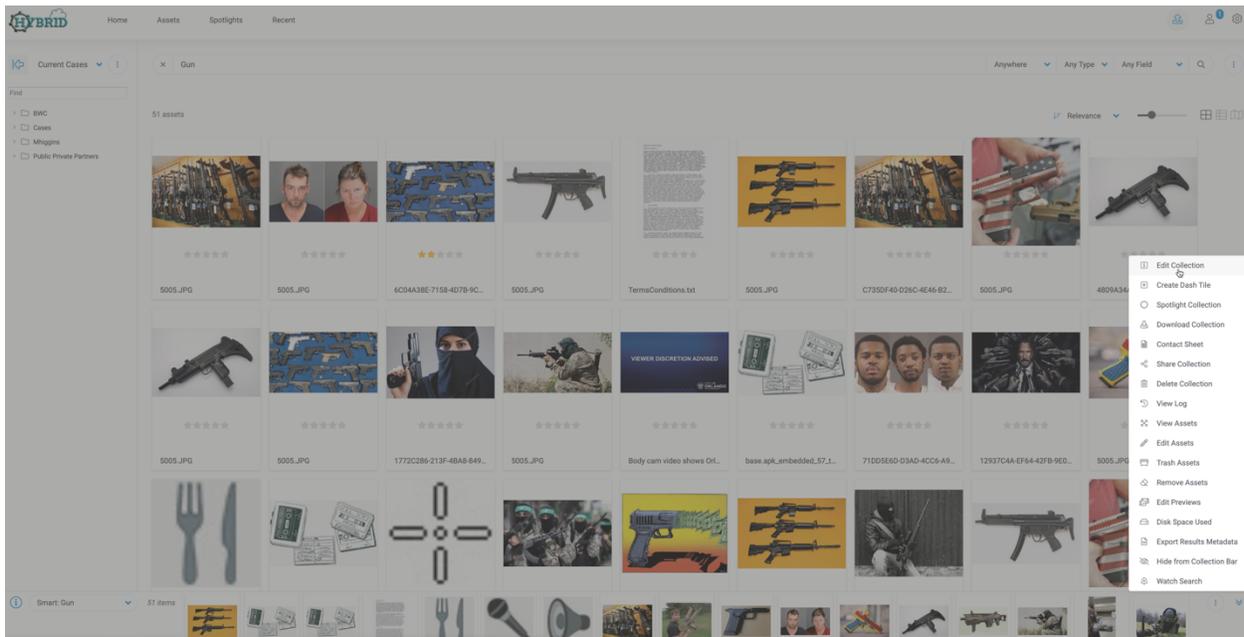
51 assets Relevance ▢



Once the search is complete based on the triggers you desire, in the search Actions box above the tiles, select **Save search as smart collection**.



You will see your smart collection below - but it will have a generic name. If you plan to have just one smart collection, this will not be an issue. However, if you create more than one, it could become confusing. You can easily rename your collection by selecting Edit in the collection Action menu.



It will then open a new page for you to rename your smart collection. Note: It will not appear as such, but it will automatically start the title with **Smart Collection**: no need to state as such.

Edit Collection



Name

Gun



Access

Private



Attached Users

Email / Full Name / Group



Related Keywords

Smart collection: result count limit

End Result

Smart: Gun



51 items



Now as any user adds any of the trigger values that you have set up, assets will automatically appear in your smart collection.

From Selected Search Results

- On the search results, multi select your desired assets by holding on ctrl/command then either individual click on the assets of your choice or drag click your cursor
- Hit right click on the selected assets then click on "Save to collection"
- Please note that this will automatically add to the currently selected collection.

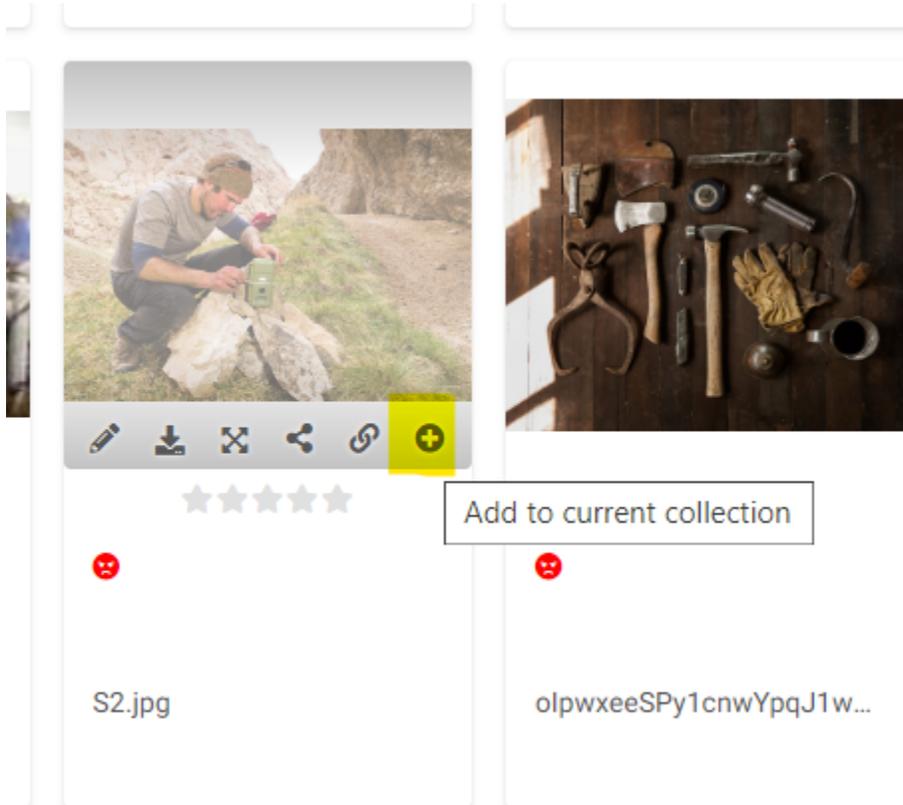
From Folders

- On the file directory at the leftmost panel left click on the folder you wish to create as a collection
- Right click on the folder then click on “Create Collection”

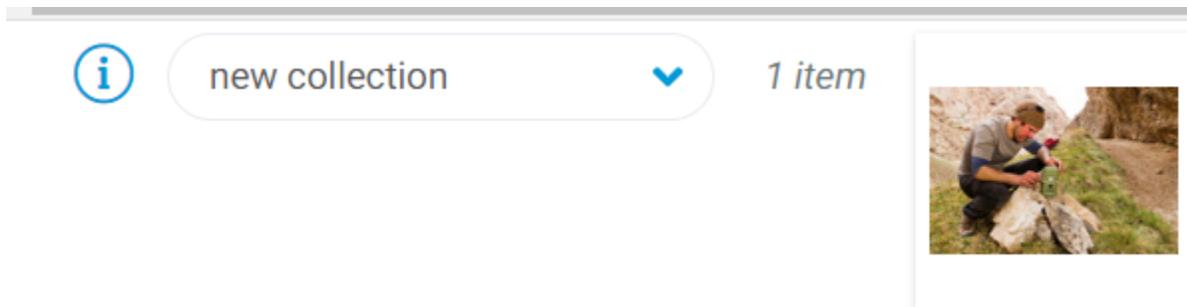
Adding Assets to Collections

From Search Results

Navigate around the DAM as you normally would, and as you come across assets click the + button to add assets to your newly created collection (highlighted).



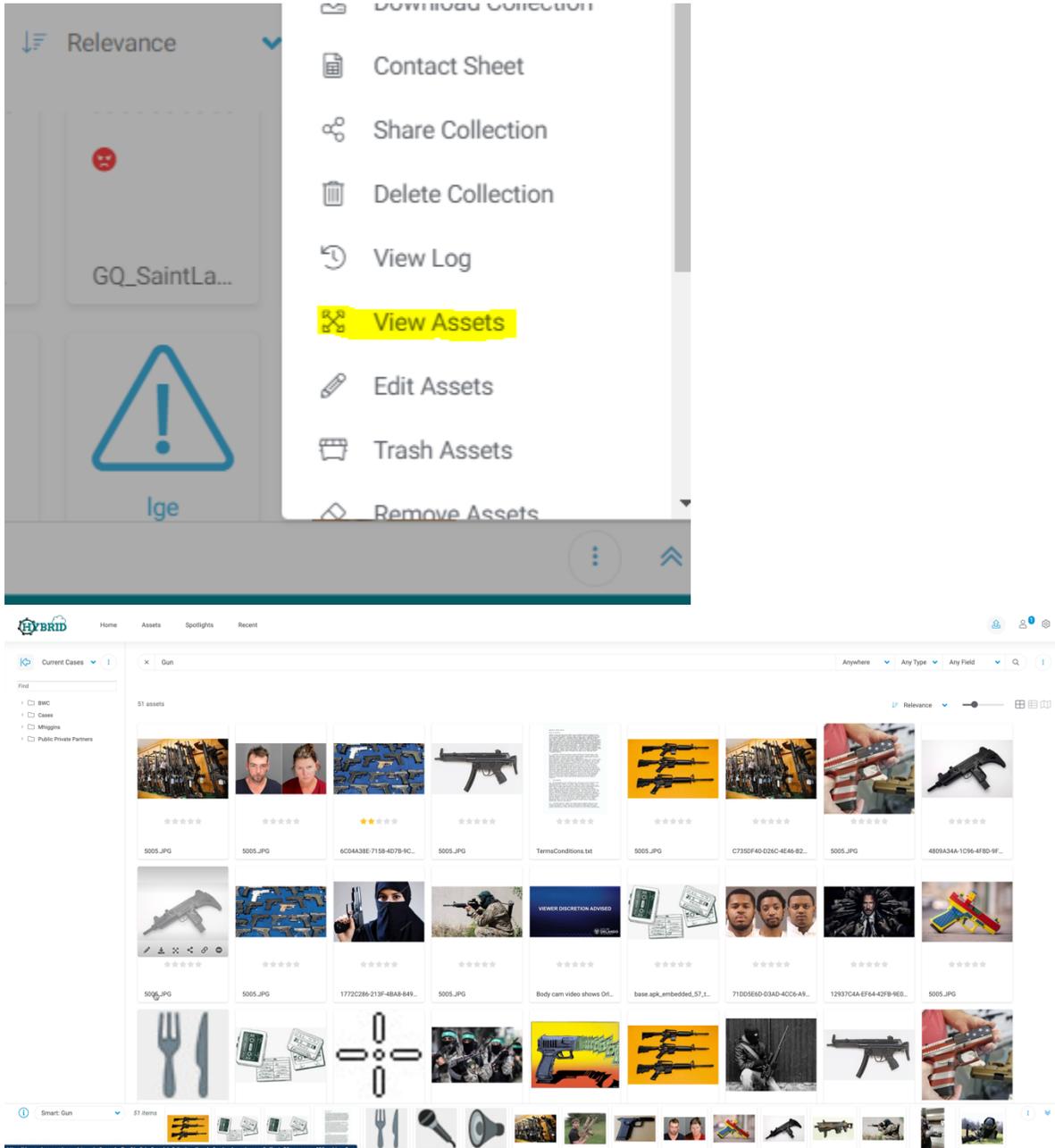
Each asset's + sign that you click will add to the selected collection and will be visible in the collection toolbar.



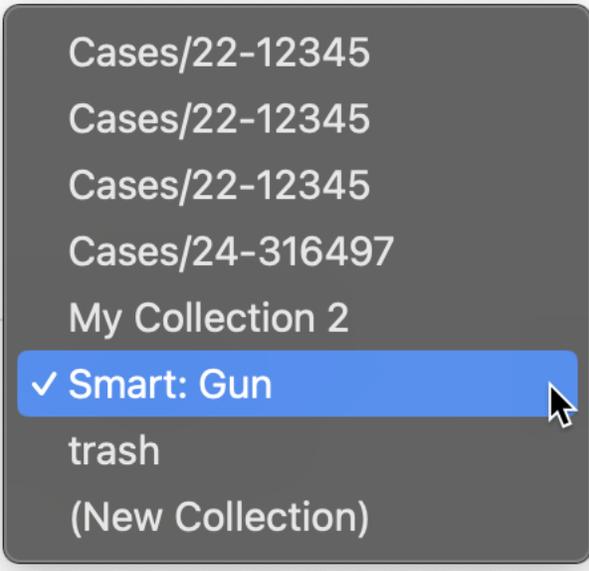
From Another Collection

Many times, you will have a group of assets in a collection but want to share part of that collection with another user. Thankfully, there is a simple way to do this within **HYBRID**.

When in a collection select "View all assets", the assets will display above the collection bar.



Select the destination in the collection bar where you want assets to end up.



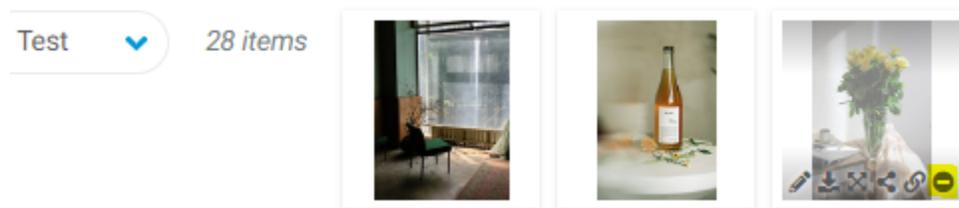
The view above will still show the original collection being viewed. You can then just multiselect assets or move assets singularly to that new collection.

Note: This will ADD those assets to the new collection - so they will exist in more than one collection - if you don't want them in the older collection, they will have to be removed from the first collection.

Removing Assets from Collections

Removing Single Assets

To remove an asset from the collection, click the -- key that appears as you mouse over an asset.



Removing Selected Assets

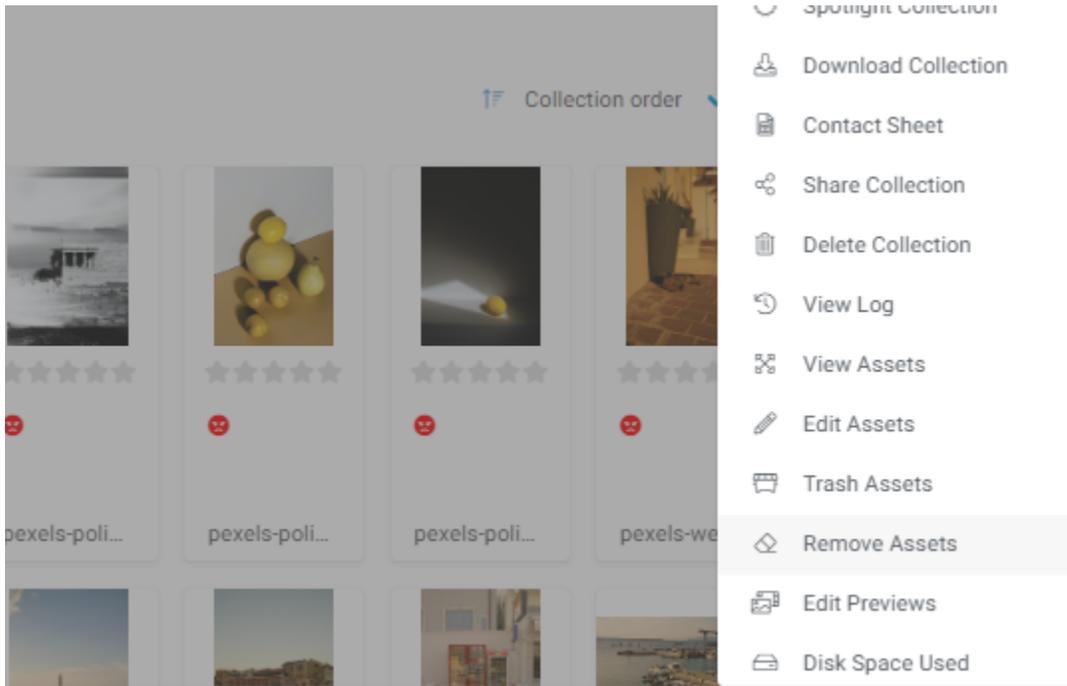
Should you wish to remove multiple assets from a collection, you may do so with the following steps.

- In the collection bar, select your desired collection.
- Click on the three-dot menu icon then click on “view assets”, this will bring you to a screen with all the assets in the collection

- Multi select by holding down the “ctrl/command” button then dragging the cursor or clicking on the assets.
- Then right click, then click on “remove from collection”

Removing All Assets

If you want to remove all assets from the collection, but retain your collection, you can navigate to the collection bar, and in the Actions menu, click and select Remove assets. Note: If you are an admin and have the ability to delete, ‘delete all assets’ will appear. This selection will delete them from the selection, and from the DAM. Remove assets will only remove them from the selection.



Tips, Tricks, and Common Questions

How to Add Assets from One Collection to Another

It’s fairly quick and simple to add assets from one collection to another. You can add one, many or all assets to another collection.

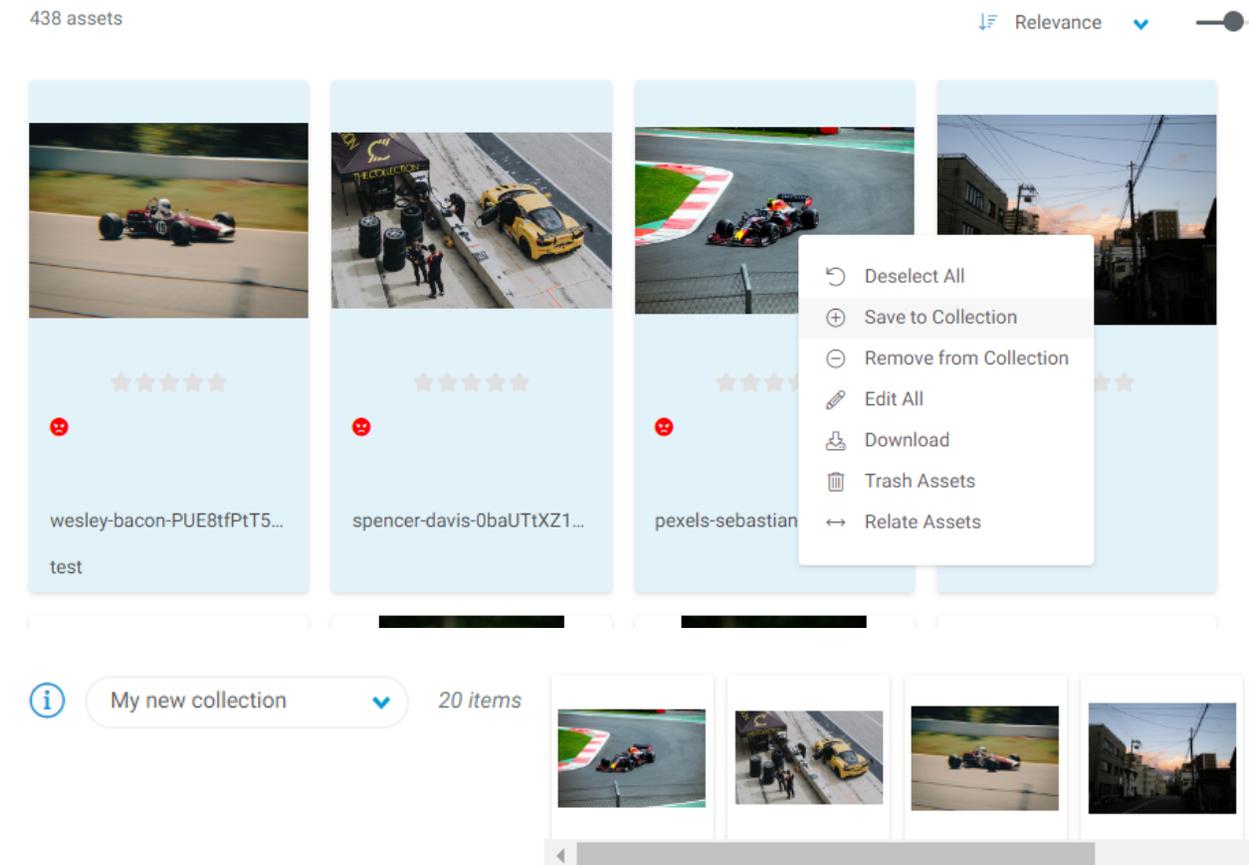
Save a single Asset from One Collection to Another

1. Use the collection bar or the Manage Collections area to locate the collection that contains the asset. Use the collection actions button and select ‘View Assets’
2. Use the collection bar to select the collection you’d like to add the asset to.

3. Locate the asset in the search results panel and use the plus icon to add it to the collection displayed in the collection bar.

Save Multiple Assets from One Collection to Another

1. Use the collection bar or the Manage Collections area to locate the collection that contains the asset. Use the collection actions button and select 'View Assets'
2. Use the collection bar to select the collection you'd like to add the asset to.
3. Use the lasso or multi-select method on the search results to select the assets you want to copy to the other collection.
4. Use the multi-select right-click menu and click 'Save to Collection.'



Save All Assets from One Collection to Another

1. Use the collection bar or the Manage Collections area to locate the collection that contains the asset. Use the collection actions button and select 'View Assets'
2. Use the collection bar to select the collection you'd like to add the asset to.
3. Use the search results action menu and select 'Save Results to Collection.'

Logging out

1. Click on the user icon in the upper right-hand corner.

2. Scroll down to log out and select.

Selecting Multiple Search Results and Performing an Action

Multiselect on Mac

Press and hold the Apple/Command key and select assets in your view. The key must be held down while selecting assets.

Multiselect on PC

Press and hold the Control key and select assets in your view. The key must be held down while selecting assets.

Performing an Action on Selected Results

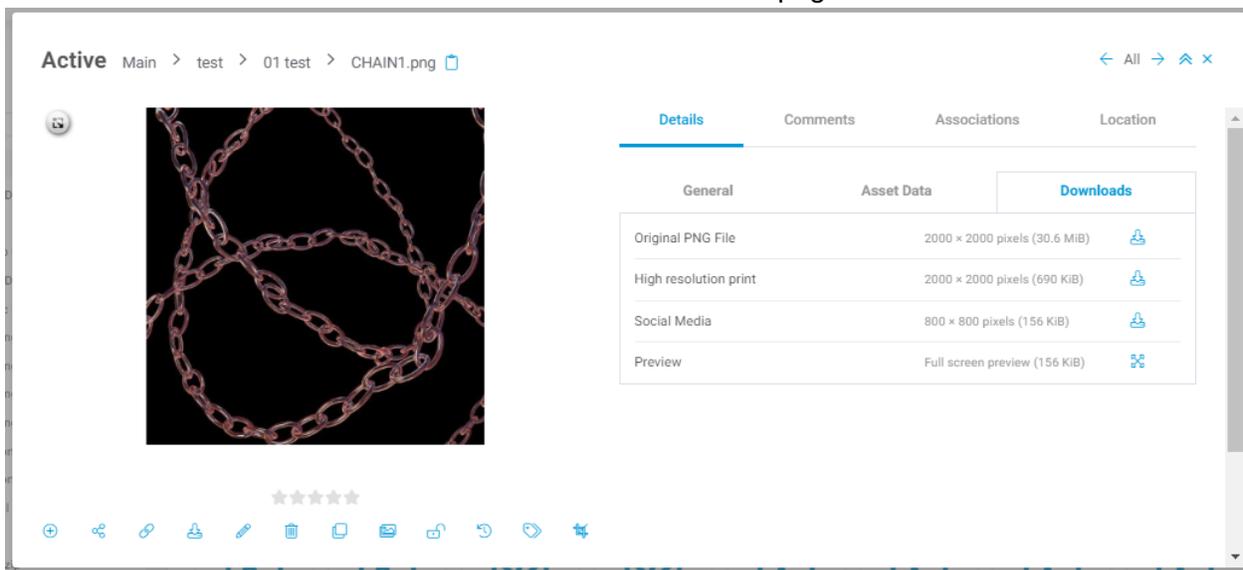
Once assets are selected you can right click on a selected asset to display the available actions.

Downloading Assets

Assets can be downloaded one by one or in batches. When downloading assets in batches the files are provided in a compressed (zip) format.

Downloading a Single Asset

Assets can be downloaded singularly from search results, the collection bar and on an asset's details page. Using the download icon on search results, the collection bar, or under the asset preview on the details page downloads the main asset file. To download special sizes or versions of the asset click the Downloads tab on the details page.



Downloading Multiple Assets

Assets can also be downloaded in bulk from a folder, collection, or using multi-select.

Folder Download

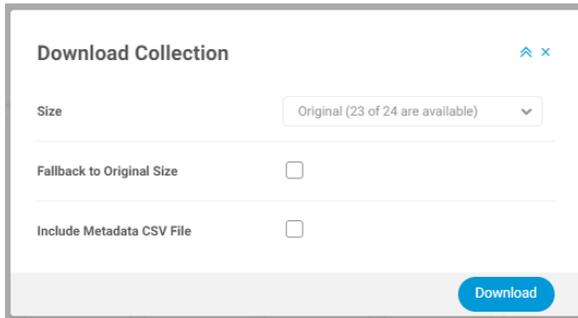
Right click on the folder of assets you'd like to download and select the 'Download' option.

Collection Download

Add assets to a collection, then in the collection menu, select "Download Collection"

A button with a download icon and the text "Download Collection".

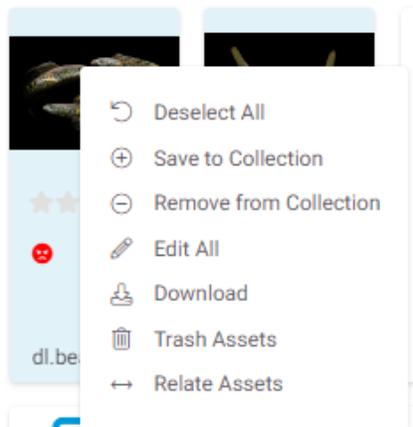
The Download Collection as Archive page will open. Select the download size, choose to replace non-original sizes with the original should they not be available, and add a CSV of asset metadata and click the 'Download' button.

A screenshot of the "Download Collection" dialog box. It has a title bar with a close button. Below the title, there are three rows of settings: "Size" with a dropdown menu showing "Original (23 of 24 are available)", "Fallback to Original Size" with an unchecked checkbox, and "Include Metadata CSV File" with an unchecked checkbox. At the bottom right, there is a blue "Download" button.

Your request will be placed in a queue and a notification will be sent to you when the download is ready.

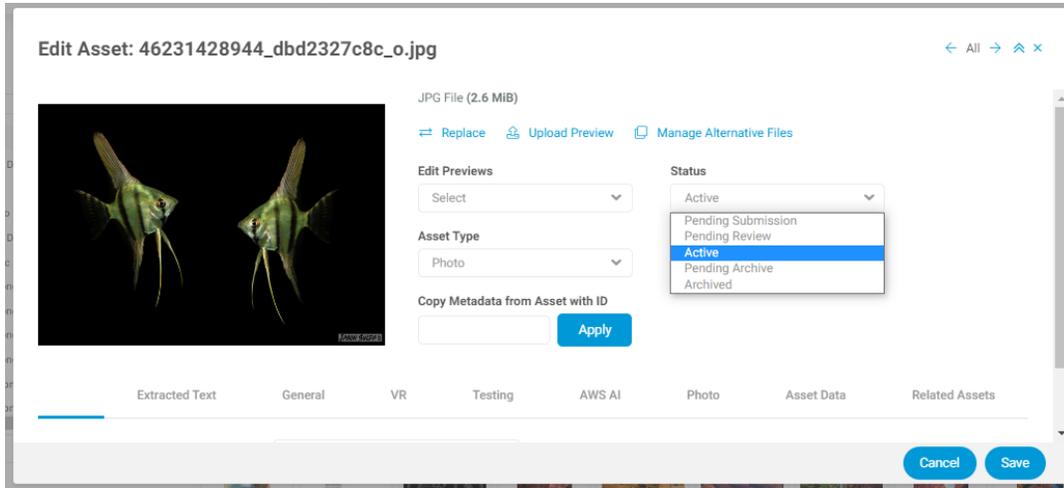
Multiselect Download

The ability to download selected assets is available from the selection's right-click context menu.



Applying status to assets

Assets can be moved along a workflow in the system based on status. Note: No assets are actually moved from their location in the directory but based on permissions of the user/group some asset statuses may make the asset not visible to the user.



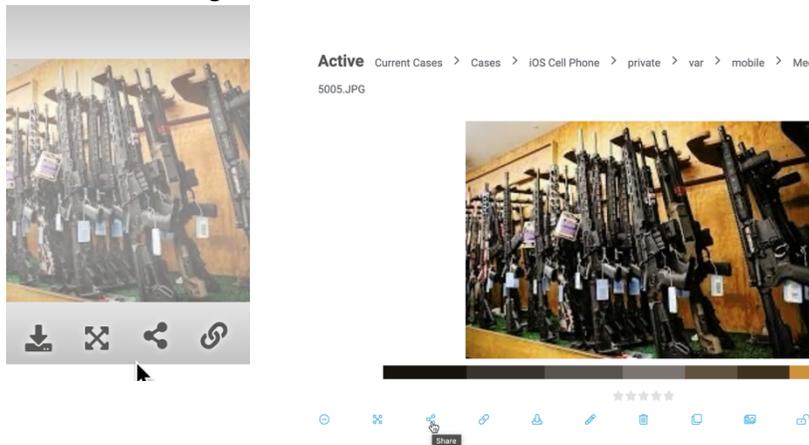
Asset Sharing

How do I send assets/ collections to people with no HYBRID accounts?

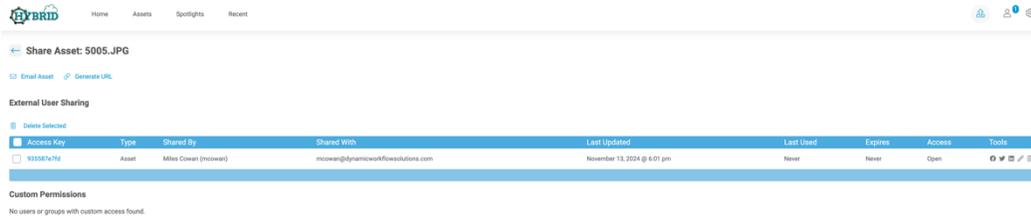
To share these assets and collections externally, here are some steps you may follow:

1. Individual assets

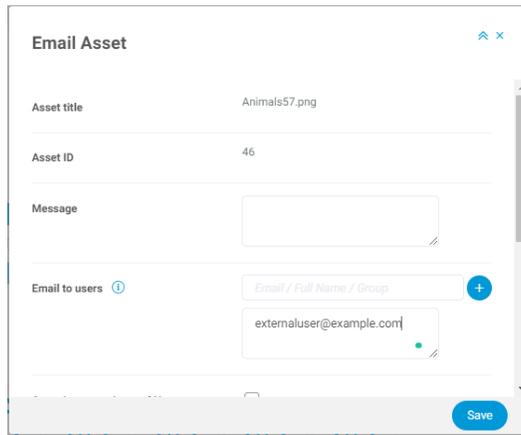
- a. You can externally individual assets by simply clicking or hovering on an asset and then clicking on the share button.



- b. After clicking, it will bring up the external share menu. In that menu will be 2 options of sharing, either by email or generating an externally available URL.



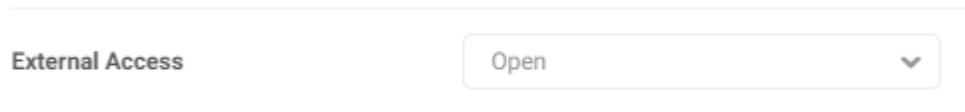
- c. For emailing assets, clicking on the button brings up a menu that allows you to edit the options on how you wish to email the asset as well as adding the recipients you wish to receive this email. If your recipient however is an existing user, you may simply type in their name or username then click on the plus icon.



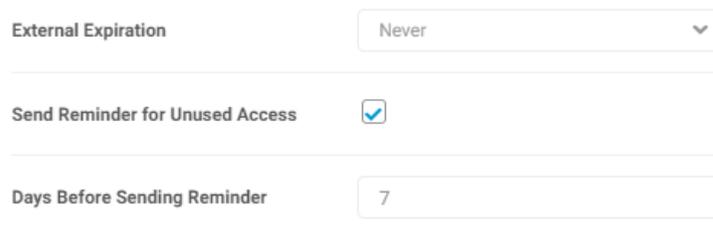
- d. For recipients with existing **HYBRID** accounts, make sure to check on “Open Access To All Users” to make sure they have access to the assets even in different permission groups.

Open Access to Internal Users

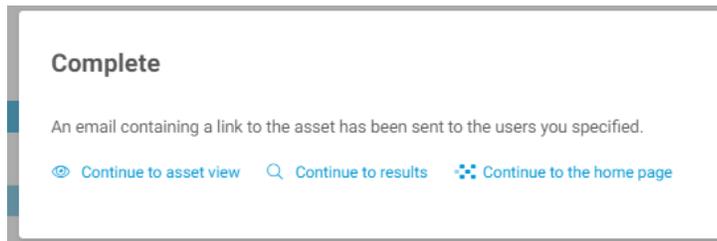
- e. For recipients with no accounts, please make sure that the “External Access” option is set to open to make sure your recipients are able to view the asset



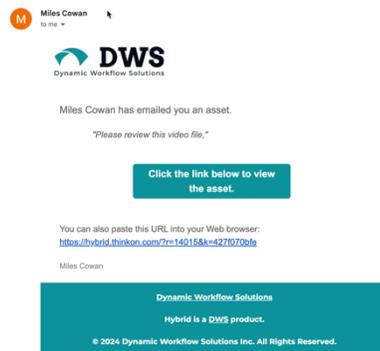
- f. You have the ability to set the expiration date for accessing, reminding them to access the asset as well as setting a password for added security



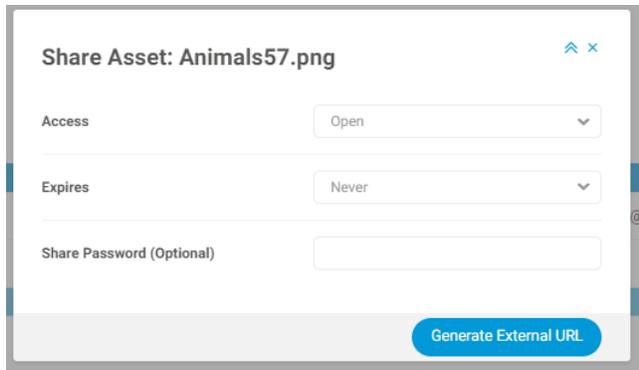
- g. Hit save once you are done to send the email and you will be shown this confirmation.



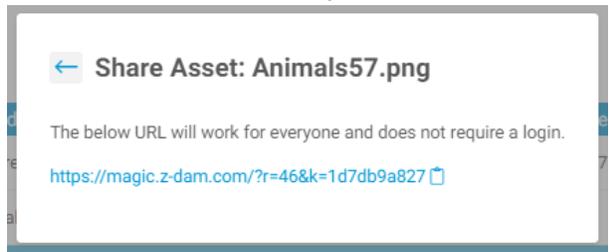
- h. Your recipient will receive an email that they can click on to view and download the asset you have sent



- i. For the “Generate Link” option. Clicking on it brings up options for the link’s expiry, access and password.

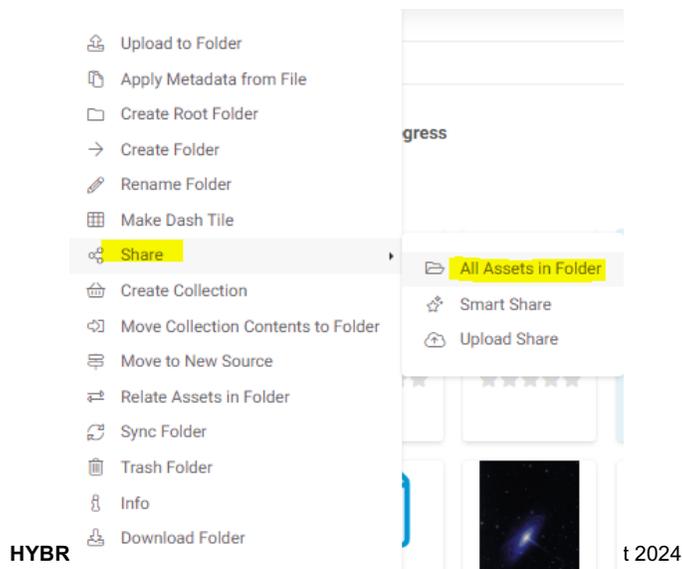


- j. Once done, click generate to get a shareable link that you may copy and share easily.



2. For Asset folders

- a. On the folder navigation panel located at the left side of the page, simply right click on the folder you wish to send to bring up the external share menu then you may follow the proceeding steps outlined above.

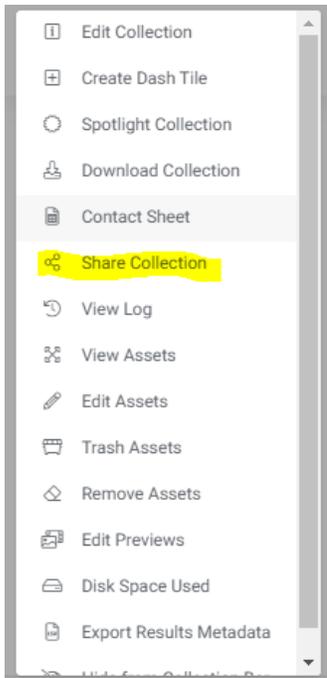


3. For Collections

- a. Click on the menu button on the Collections panel located at the bottom of the page.

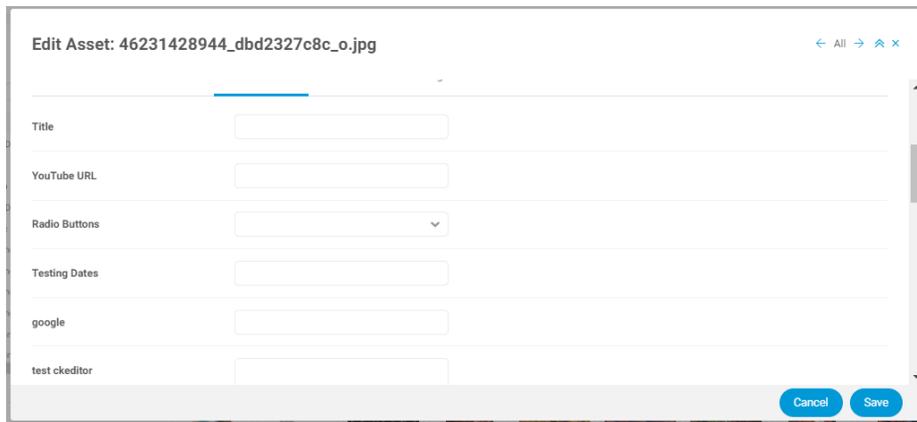


4. This will bring up the collection menu, then click on the share button to proceed to the external share menu then follow the proceeding steps outlined above.



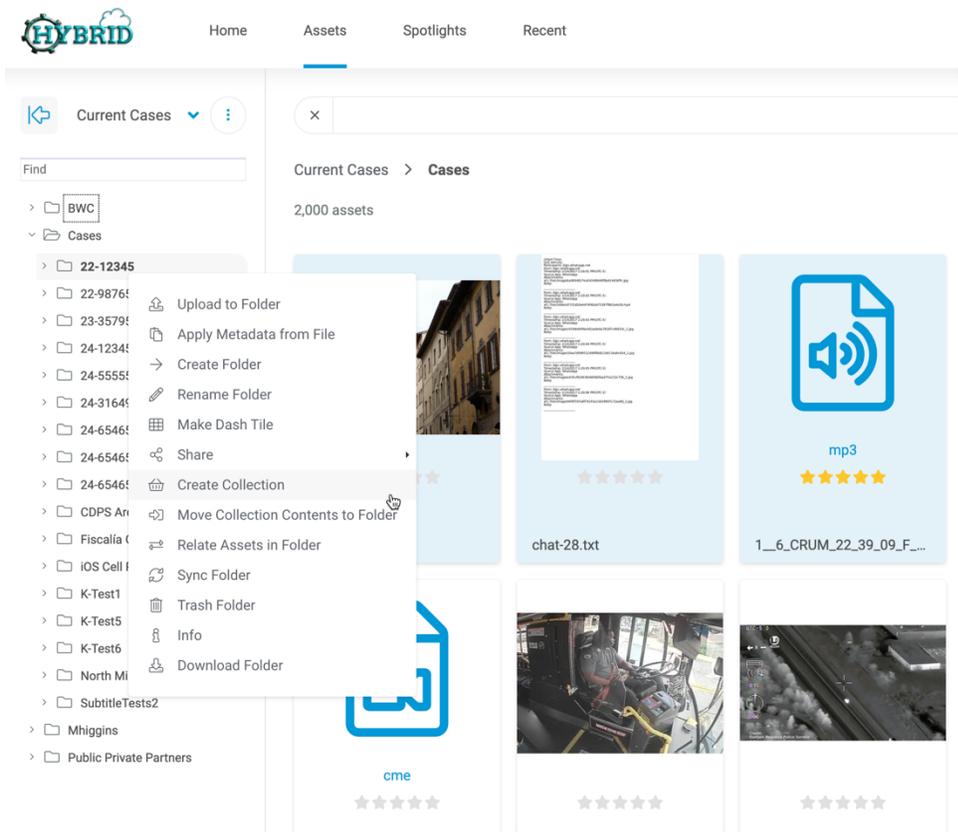
Editing Asset Metadata

Editing metadata is a snap with **HYBRID**. Click on the “Edit” icon and it will open a metadata edit screen. Enter the metadata and hit TAB to move to the next field and it will automatically save.

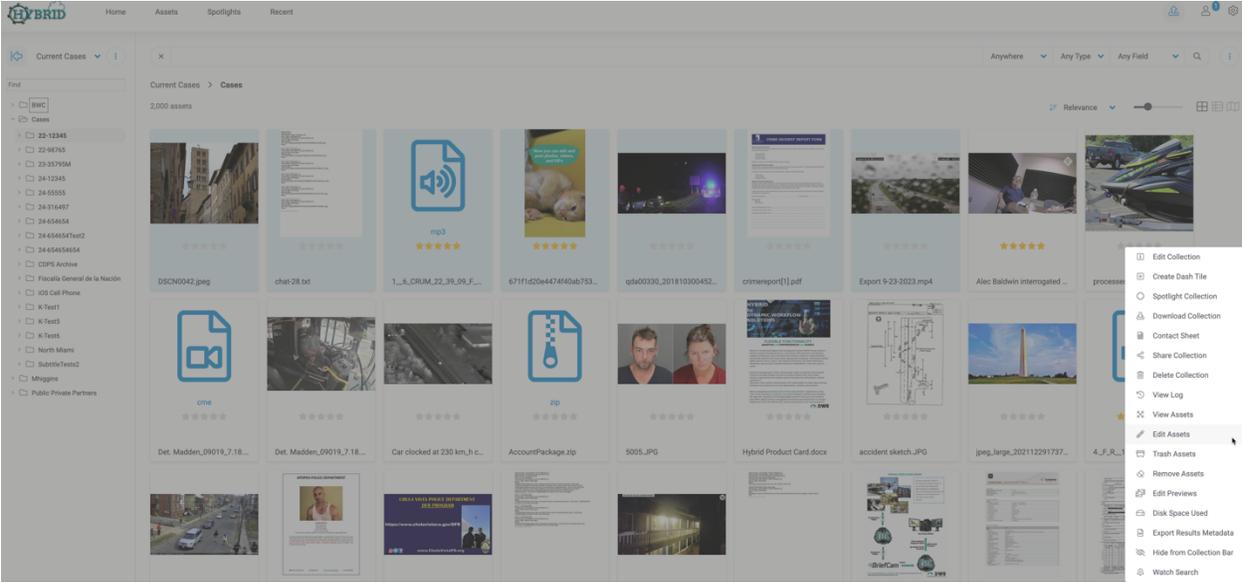


The screenshot shows a web-based form titled "Edit Asset: 46231428944_dbd2327c8c_o.jpg". The form contains several input fields: "Title", "YouTube URL", "Radio Buttons" (a dropdown menu), "Testing Dates", "google", and "test ckeeditor". At the bottom right of the form, there are two buttons: "Cancel" and "Save". The interface is clean and modern, with a light gray background and blue accents.

To edit the metadata of all assets inside a folder, it takes just a few more steps. Select the folder that you’d want to stamp with metadata. In the view screen choose “create collection”. This will add all of the content of that folder into the collection that you have open below. You will want to ensure that the collection that is open below doesn’t contain any assets that you don’t want stamped with metadata.



In the collection action bar, you will want to choose “Edit all assets”. This will open up the edit metadata screen where you can make all necessary changes and then click tab or click save so your changes remain in place.



Importing Assets from Other Applications

Certain plugins allow you to upload content into **HYBRID** stored in other applications. Currently, the following integrations allow file import:

- Dropbox

Importing a File

1. In the directory browser, locate the source and folder that you would like to import your file to.
2. Right-click on the folder to display the context menu and locate the 'Import' option. Hovering over this option will display a sub-menu of available import locations. Select the desired import location.
3. If this is the first time you've used the selected import location, you will be prompted to log into that location and approve use of **HYBRID** to make changes on your behalf.
4. A list of available files to import from the location will be displayed. If the import location supports directory structures you will be presented with the directory structure. Navigate to the desired file and select it. Then, click the save button.
5. Should a file with the same name already exist you will be notified on screen and present with three options to select from:
 - a. Replace: replace the file on **HYBRID** with the one from the import location.
 - b. Skip: leave the **HYBRID** file untouched and do not import the file from the import location.
 - c. Keep: leave the **HYBRID** file untouched and import the file from the import location, modifying the file's name.

At this point the file has been queued for import. Once completed you will receive a notification with a link to the **HYBRID** location in which the file was imported to.

Should the import fail a notification will be received with the reason for the failure.

Importing a Folder

Importing a folder works just like importing a file. Please note that folder importing is only available when the import location supports directory structures.

Should a folder or subfolder with the same name already exist the contents from the import location will be uploaded to the existing folder.

Exporting Assets to Other Applications

Certain plugins allow you to upload content from **HYBRID** into other applications. Currently, the following integrations allow file export:

- Dropbox

Exporting a File

From the Directory Browser

1. In the directory browser, locate the file that you would like to export.
2. Right-click on the file to display the context menu and locate the 'Export' option. Hovering over this option will display a sub-menu of available export locations. Select the desired export location.
3. If this is the first time you've used the selected export location, you will be prompted to log into that location and approve use of **HYBRID** to make changes on your behalf.
4. If there is a storage limit on the export location and there is not sufficient storage for the new file you will be notified on screen. No further action will happen.
5. If the export location supports directory structures you will be presented with the directory structure. If the export application supports read-only folders, they will be marked as such and will not be available for selection. Navigate to the desired folder to export the file to and select it. Then, click the save button.
6. Should a file with the same name already exist in the export location you will be notified on screen and present with three options to select from:
 - a. Replace: replace the file on the export location with the one from **HYBRID**.
 - b. Skip: leave the export location file untouched and do not export the file from **HYBRID**.
 - c. Keep: leave the file in the export location untouched and export the **HYBRID** file, modifying the file's name.

At this point the file has been queued for export. Once completed you will receive a notification with a link to the export location in which the file was exported to.

Should the export fail a notification will be received with the reason for the failure.

From the Asset Details Page

Use the export locations's action icon under the asset preview to request export of the file. From there on the process is largely the same as when exporting from the directory browser.

Exporting a Folder

Exporting a folder from the directory browser works just like exporting a file.

Please note that if the export location does not support directory structures the files contained within the chosen **HYBRID** folder and its subfolders will be exported.

Should a folder or subfolder with the same name already exist the contents from the import location will be uploaded to the existing folder. If the existing folder is marked as read-only you will be notified on screen and present with two options to select from:

- Skip: leave the **HYBRID** file untouched and do not import the file from the import location.

- Keep: leave the **HYBRID** file untouched and import the file from the import location, modifying the file's name.

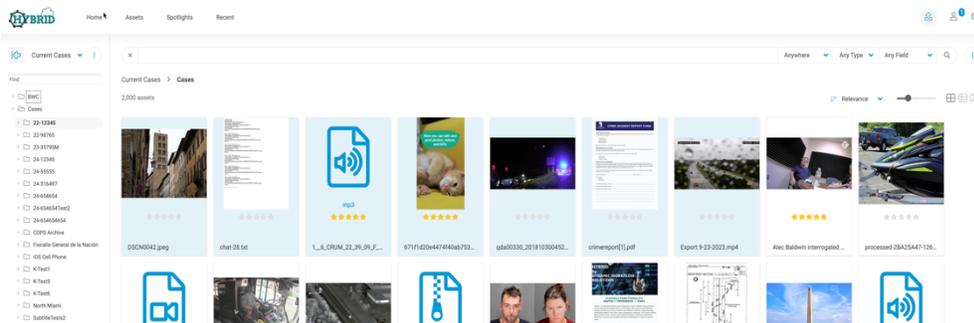
Exporting a Collection

Use the collection action's menu and select the export location. From there on the process is largely the same as when exporting a folder from the directory browser. The collection's name will be used to create a folder on the export location should it support directory structures. If a folder with the same name as the collection exists, the process for resolution will be the same as when resolving a duplicate folder.

How to Search More Efficiently in HYBRID

Searching within **HYBRID** is fast and easy, and when used properly, it can be a valuable tool for finding exactly what you need in an instant.

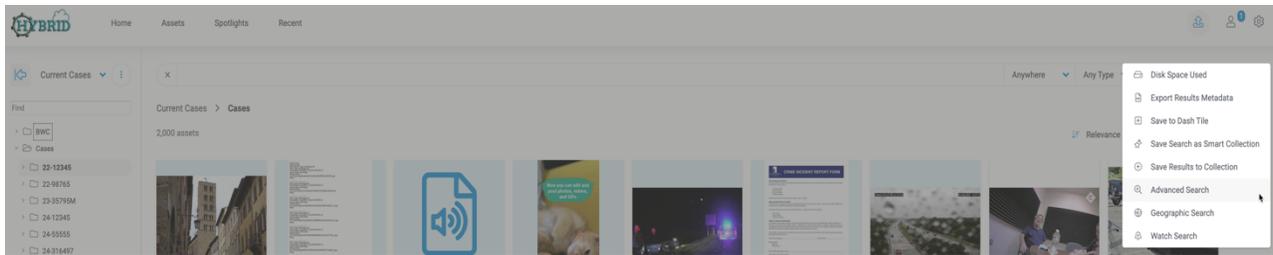
The Search Bar, or a simple search, is located at the top of the page. This would be for broad or general searches. If you are looking for a "ball" but not a specific asset, etc.



Anywhere / Any Type / Any Field: These drop-down menus will help refine your searches when using the simple search bar. Searching “Anywhere” will search across the entire system. You can also change “Anywhere” to “Current Directory” and your search will now remain within a selected folder. “Any Type” will search on all types of assets, or one can be selected on the drop-down for a more specific search. “Any Field” will search across all fields that have been indexed. Certain fields may appear in the dropdown as selected by the DAM Admin for a more directed search.

Advanced Search: This is for very directed and pointed searches. To find an asset that is active in the DAM has specific metadata, and uploaded by a specific user, you would use the advanced search.

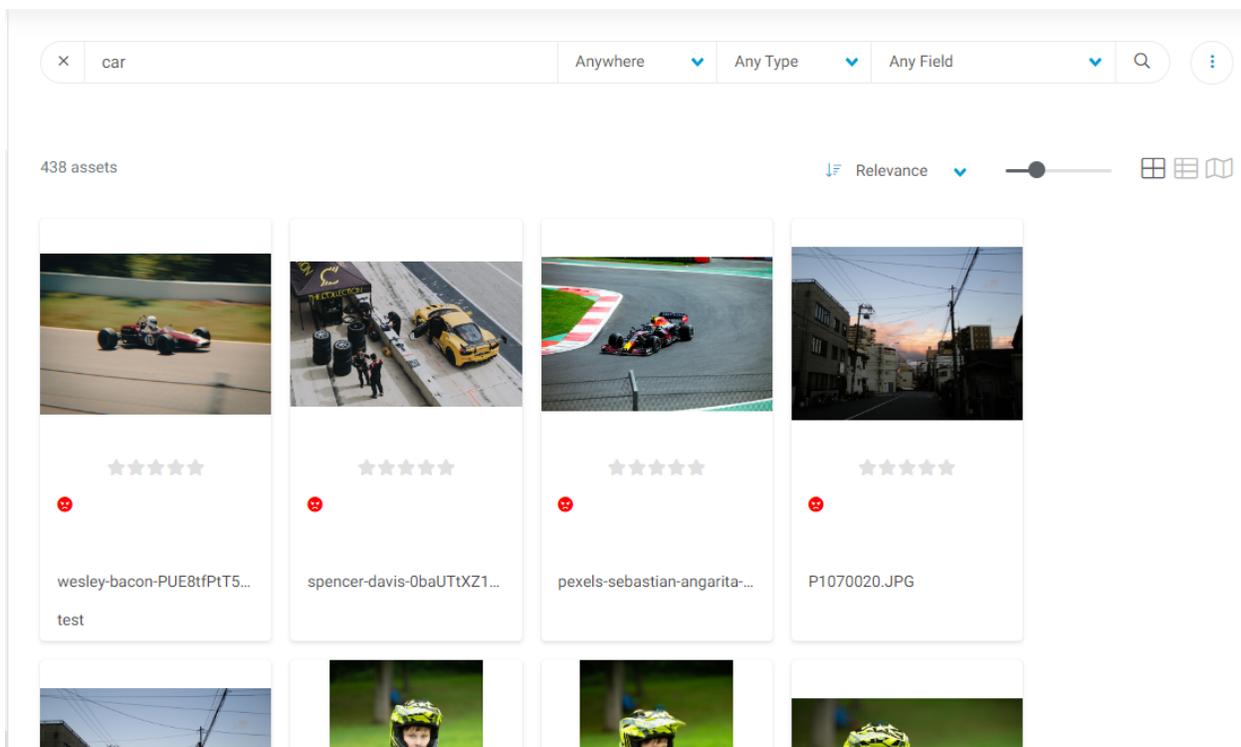
To perform an advanced search - click on the magnifying glass icon with the plus inside (directly to the right of the regular magnifying glass icon - denoted by the red arrow below)



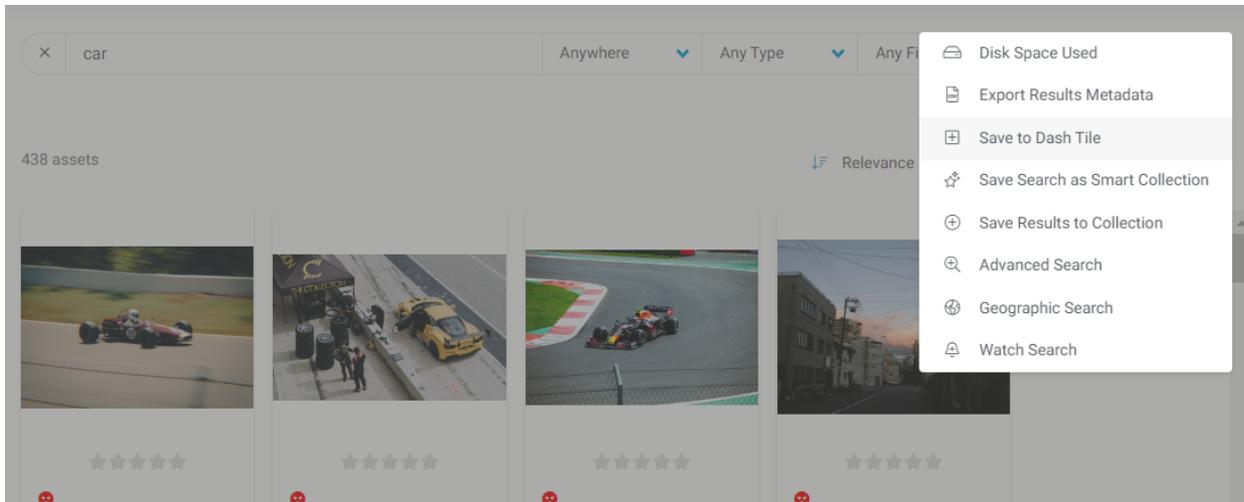
This will take you to a search screen that allows you to search in specific fields.

Saved Search: You can save searches as collections or as a dash tile to search with one click. The dash tiles can be for a specific user, groups, or all users. If they are regular searches, I would suggest creating these as they make things quite easy.

Save to Dash Tile - Enter a search term(s) into the search bar, we will use the term “car” in this example - you will see images appear at you click enter.



You can save this search to a dash tile. Click on the actions directly about the search results and select Save to dash tile.



It will open up a page of options for your tile

Create Dash Tile



Preview



Title

Car

Text

Tile Style



Single



Blank

Asset Count



Custom Image Upload

Upload Image

Tile Image

146986 - wesley-bacon-PUE8tfPtT5I-u ▼

Create



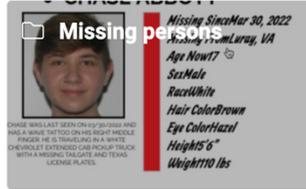
Home

Assets

Spotlights

Recent

Spotlights



If you go and edit any assets and add the term “boy” - it will now show in that same search with one click of your dash tile for boy (note the new asset to the right).

438 assets

Relevance



COM_8287.jpg



COM_7886.jpg



COM_7882.jpg



COM_7886.jpg

Special Search Terms:

Below is a collection of special search terms that if used can produce desirable results in a quick manner with little effort.

Conduct a search for a set number of the last uploaded photos

Enter: `!last[quantity]` An example: `!last10`

A Search for Assets that have never been downloaded from **HYBRID**

Enter: **!nodownloads**

A search for duplicate images within **HYBRID**. This search does a check for all images within the system so depending on how your permissions are granted, you may not be able to see all the duplicate assets in the results.

Enter: **!duplicates**

As a user, you may conduct a search for all assets that have been related to another asset in the system.

Enter: **!related[ref]** An example: **!related34**

A search for images with a general color grade similar to a given rgb color.

Enter: **!rgb:[r],[g],[b]** An example: **!rgb:100,100,100**

In **HYBRID**, it is possible to search by a color key for similar image assets. This works much like RGB color matching but uses chroma key/color key formatting.

Enter: **!colorkey** Example: **!colorkeyWBCNG**

HYBRID: CSV Metadata Export

Overview

The CSV Metadata Export tool provides easy access to the stored metadata of any asset in an accessible format. It's availability from both search results and collections make exporting the metadata from one or all assets possible.

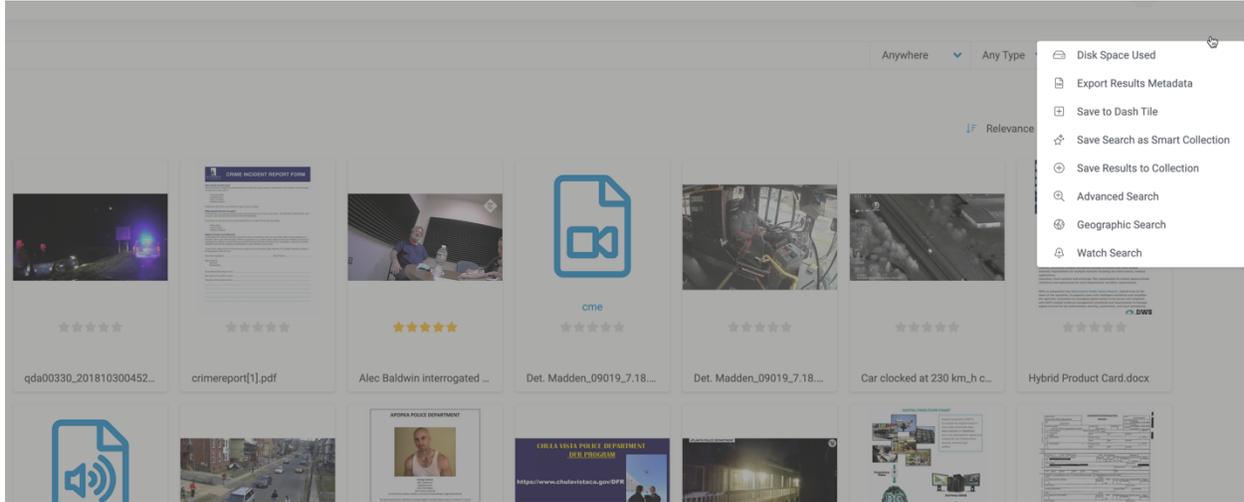
Access to this tool is granted through either a global configuration option or through group configuration overrides. If you are interested in this tool but do not see it available, please contact **Dynamic Workflow Solutions** Support to have it enabled.

Fields, by default, are enabled for inclusion in the export, though they can be omitted.

Selecting Assets for the Export

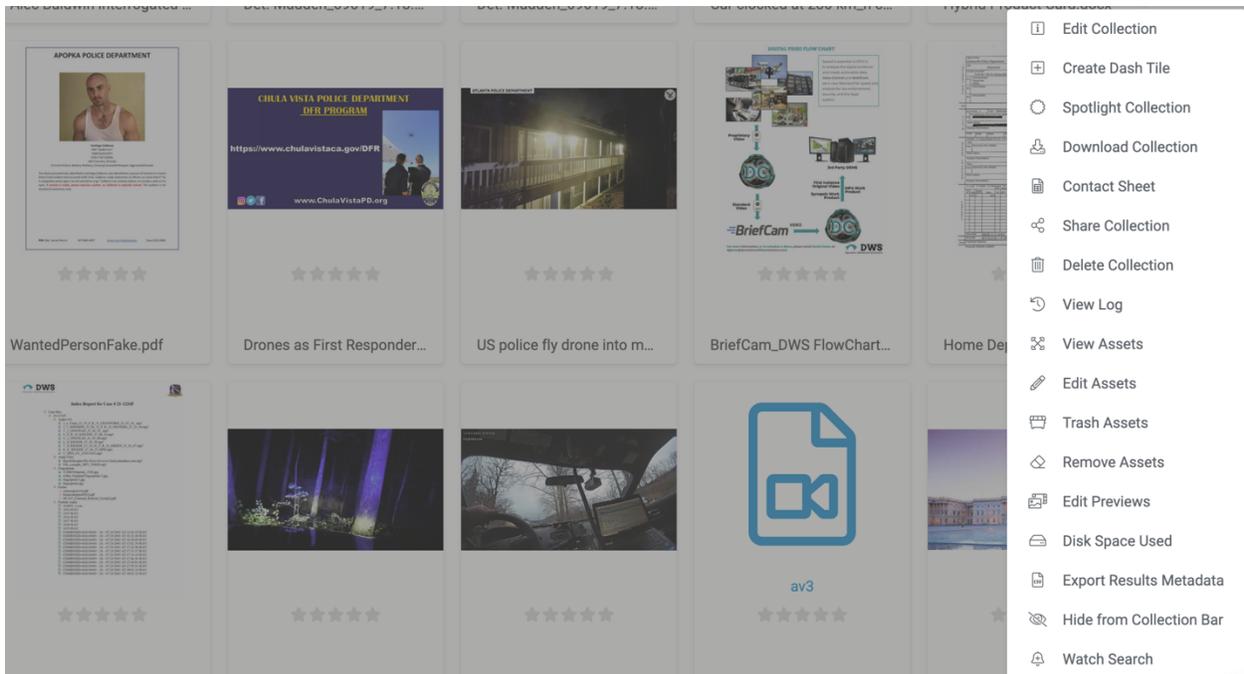
Assets can be selected in two ways:

Search Results



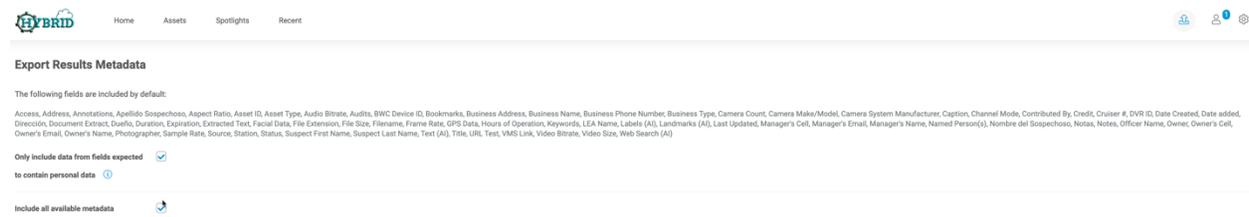
Simply run a search using the Search Bar or Advanced Search. Use the search result's 'Actions' dropdown to select 'CSV Export - Results Metadata'.

Collections



Place the desired assets into a collection of your choice. Use the collection's 'Actions' dropdown to select 'CSV Export - Results Metadata'.

Export Options



Only include data from fields expected to contain personal data.

Limit the exported data to fields marked for use with personal data. Asset ID, Asset Type, and Contribution data included with this option.

If you are unsure which fields are included, please reach out to your DAM administrator or contact **Dynamic Workflow Solutions** Support.

Include data from all accessible fields e.g. contain technical metadata and detailed file information

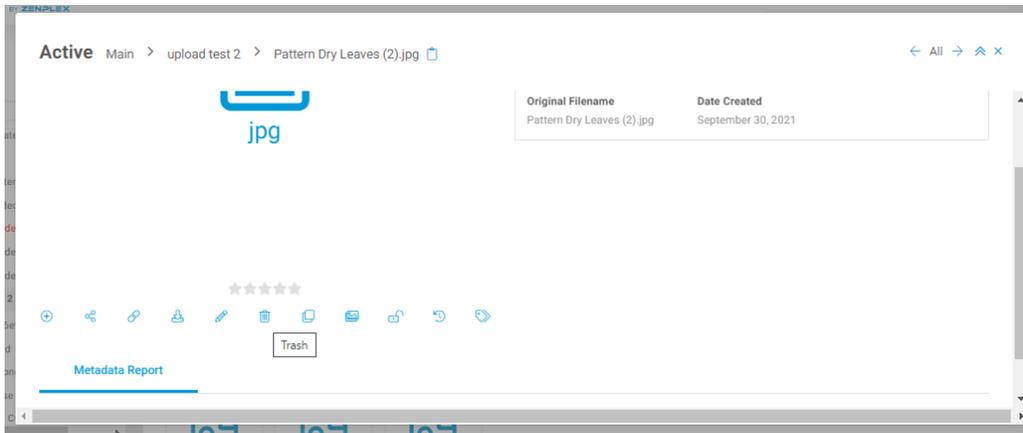
Include all metadata fields, regardless of their setting for inclusion in the export.

Additional Notes

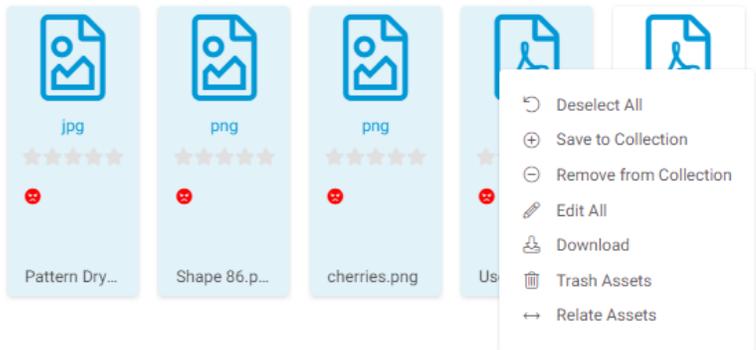
Download times will vary depending on the number of assets selected for the report.

Trashing/Deleting files in **HYBRID** works similarly to a Windows Recycle Bin or Mac Trash Bin. Once you trash an asset, you still have the ability to restore it or delete them permanently. Outlined below are steps to utilize trashing files in **HYBRID**.

- I. Individual Assets: When clicking an asset, you will have an array of actions you may perform to an asset this includes the trash button. Once you click the icon, you will be asked to confirm if you wish to proceed. Doing so will send it to the trash bin.



- II. Multiple Assets: After multi-selecting assets (Holding Ctrl/Command, then click), you may right click to bring up a menu then select “Trash assets”

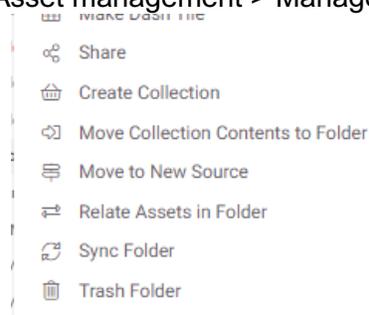


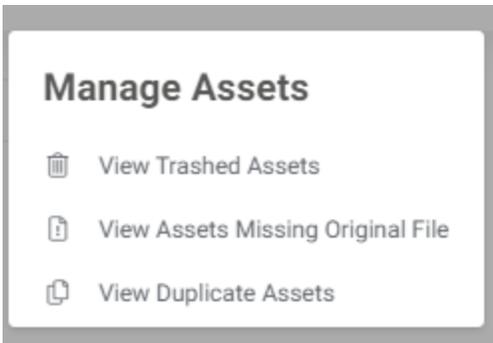
- III. Trashing Folders: On the Asset directory bar located at the left-most part of the screen, you may right click on the folder and click on “Trash Folder”. Please bear in mind that if you trash a folder and choose to restore its assets, the assets will be restored to the main folder and not the folder they were previously contained in.

Restoring assets from the trash.

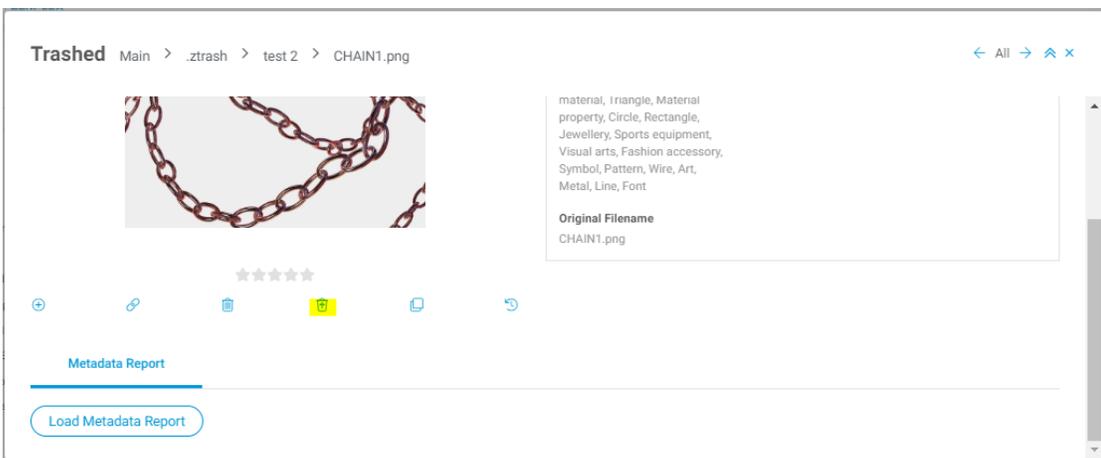
Depending on your permissions, you may be able to restore previously trashed assets back to their original file locations. Outline below are steps to do so.

- I. On the settings, Click on Asset management > Manage Trash





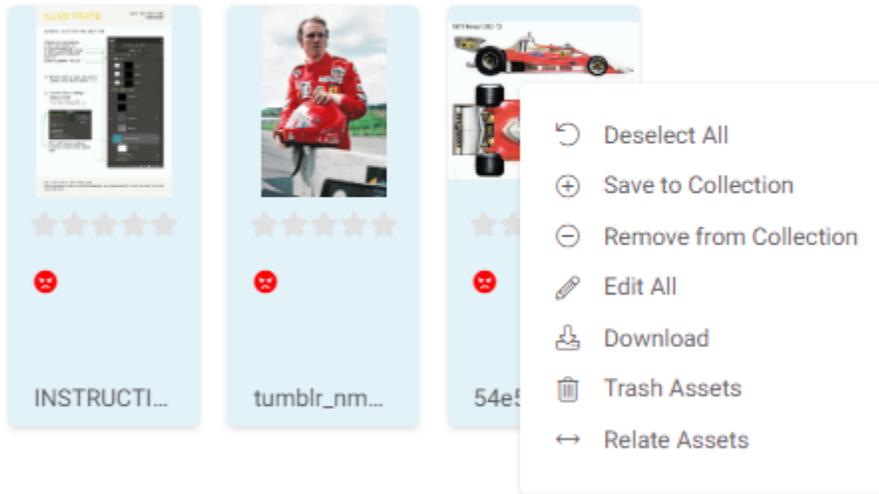
- II. Click on the asset then click on the Restore icon which is located beside the permanent delete icon



- III. To permanently delete assets, you may choose to select a single asset and click the delete button or select multiple assets then right click to bring up "Delete Assets"

Trashed Assets

3 assets



Previewing Assets with Multiple Pages

Viewing multi page assets in **HYBRID** can be done without having to download the full document. Simply click on the asset to get a detailed view then click on the detailed view to bring up a full screen view. Once in the full screen view, you will be shown arrows to let you navigate through the pages that are available for preview.