Documentation MediaHaven 2.0

Version 22.3

Contents

1 Introduction

Mediahaven is a cloud-based and on-premise Media Asset Management platform. This solution helps your organization to upload, manage and archive digital media content. The web application has a very wide range of functionalities.

The purpose of this documentation is to familiarize the user with the Mediahaven web application and more specifically its daily use. The most common scenarios are covered in this manual, but do not hesitate to contact the support team if you still have specific questions. You can contact them via the support portal: support.zeticon.com

Before we go into different functionalities of Mediahaven 2.0, some general concepts need to be explained.

2 Roles, functions and tasks

2.1 Roles

The role determines which functions the user gets. The user is always logged in for one organization and gets all the functions of the role he assumes within the organization. For our MediaHaven customers we provide following standard roles:

- Admin user
- Content Administrator
- Importer
- Counselor

An organization's admin users can assign a user to the appropriate role through the "Settings & Administration" module (see separate manual).

2.2 Features

As mentioned above, each role is assigned specific functions. These functions determine what the role can perform in terms of actions and tasks. You can consult the functions that are default linked to a role in the table below.

Function	Counselor	Importer	Content Administrator	Admin
Access to concepts		X	X	x
Charging objects		X	X	X
Metadata objects*		X	X	X
Submit & correct objects		X		X
Evaluate objects			X	X
Publish objects			X	X
Access to published objects	X	X	X	X
Consult objects*	X	X	X	X
Downloading objects, exporting*	X	X	X	X
Manage users & settings				X
Submit thesaurus suggestions		X	X	X
Evaluate thesaurus suggestions			X	X
Manage Trash				X
Evaluate user registration				X
Access to import module				X
Access to old management module				X

Depending on the rights granted through the user groups.

Since certain users cannot perform actions in a certain phase of the system, e.g. consulters cannot upload or describe anything in the concepts, the role will ensure that they do not see the relevant pages in the application. This is done based on the functions "Access to concepts" and "Access to published objects".

2.3 Tasks

In addition to functions, which the user can perform at any time without a trigger from the system, we also use tasks in MediaHaven. Tasks are assigned to a role by the system after a certain action or other task has been performed. They are not assigned to a specific user so

that an object does not get stuck in the flow when a user leaves the organization or is not present.

Example a task in MediaHaven:

- Evaluate an object or an entire collection. *(Only for users with the function: 'Evaluate objects'.)*
- Correcting an object or an entire collection. *(Only for users with the function: 'Submit & Correct Objects'.)*
- Evaluate thesaurus suggestions. *(Only for users with the feature: 'Evaluate Thesaurus Suggestions'.)*
- *Complete User Registration. (Only for users with the function: 'Evaluate User Registration'.)*

The specific explanation of each task is covered later in this manual.

2.4   Phases and statuses

Each object has a certain status at any point in the application. That status depends on the step in the process and the phase the object is in. In Mediahaven, we currently have two **phases**: **the concept phase** and **the published objects phase**. The concept phase contains objects that have been uploaded, are possibly still being processed or are ready to be described. The published phase then contains all objects that have been approved and are available to all users (depending on the rights granted, see below).

The diagram below summarizes the available statuses for each phase:
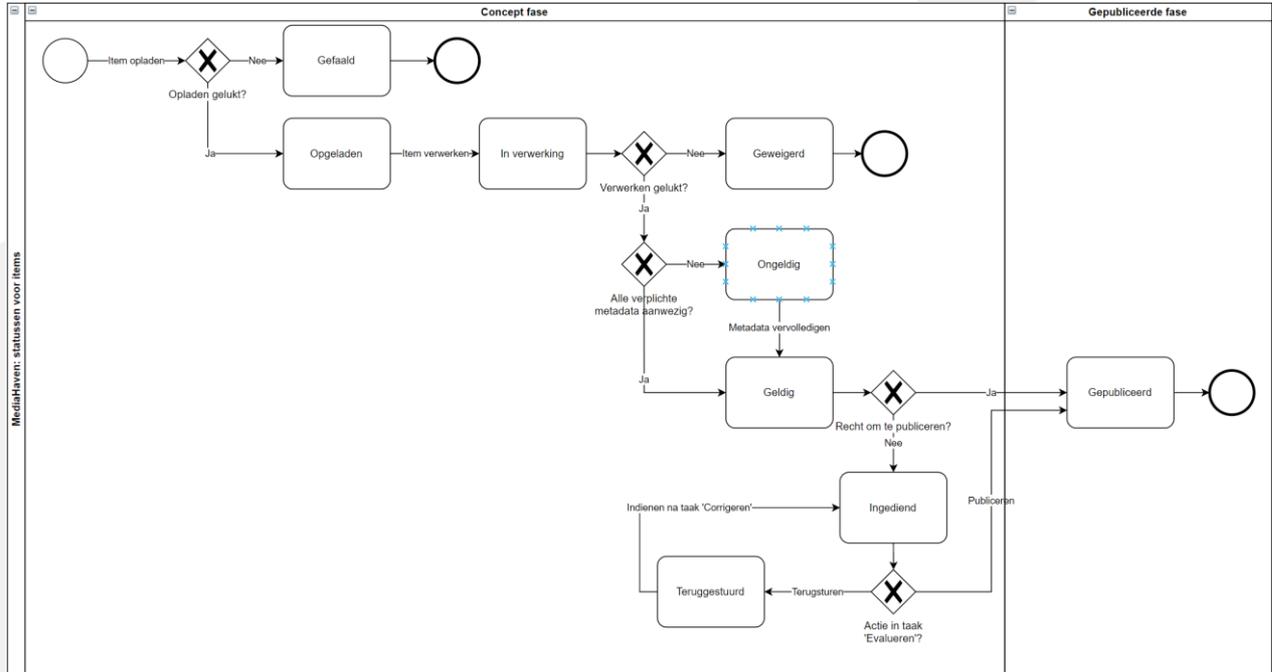
A MediaHaven2.0 collection has the same capabilities in terms of statuses as an item with the exception of the statuses 'Failed', 'Charged', 'In process' and 'Refused'. These statuses do not occur for a collection.

The meaning of each status is further explained in the appropriate section of this manual, but below is an overview:

Status	Meaning
Failed	Charging the item failed.
Charged	The loading of the item has been successful. The system now proceeds to process the item in question.
In process	The system is processing the item.
Refused	The processing of the item failed.
Invalid	Not all mandatory metadata fields are filled in for the given object.
Valid	All required metadata fields are filled in. The object is ready to submit or publish.
Submitted	The object has been submitted and cannot be edited temporarily. There is a task 'Evaluate' attached to the object for the content manager.
Returned	The object was returned to correct during the evaluation. There is a task 'Correct' attached to the object for the importer.
Published	The object is published. This allows other users to access the object, edit metadata and/or download the original according to the assigned permissions through user groups.

2.5   Permissions via user groups

During the metadata process or description of an object, the rights for that object are determined using user groups. We distinguish three types of permissions:
- **Reading rights**
- **Edit Rights**
- **Export Rights**

Every user in MediaHaven is in at least one group. The rights of the group to which the user belongs determine whether the user can consult the object, modify the object's metadata, and/or download or export the object's original file. By assigning rights via user groups, you can shield certain objects from others.

The example below illustrates the operation of these group rights:
- *Users An & Piet are in the 'Communication' user group. Their colleague from the archives department, Marc, is only in the 'Archives Department' group.*
- *An loads an image and describes it. She gives only the 'Communication' group the read, edit and export rights.*
- *When she goes to publish the image, Pete will also get to see the image. He will also be able to edit metadata and download the original. Marc, on the other hand, will not be able to see the image and consequently will not be able to edit its metadata and download the original because he does not belong to the 'Communication' group.*

Within MediaHaven we have two different types of user groups. Every organization connected to the system is given default **system groups** at setup. These groups may not be removed to ensure proper operation of the application.
- Group 'Everyone': Every new user of the application is automatically added to this group. This ensures that a new user does not end up in an empty application when they first log in. By default, the user will have read-only access to the relevant objects.

- Group 'Public': Objects for which this group has read permission will be shown on the public portal (if this is activated for the organization). For these objects, an embed code can also be retrieved to unlock the object on another website.

In addition to the system groups, **organization-specific groups** can also be configured. The organization itself decides how many groups are needed and which users belong to which group. This is done during the metadata workshop when setting up the system or can be changed later via a change request to our support department. We recommend to limit the number of groups so that the management of these groups does not become too complex and so that the collaboration within the organization is promoted. The groups 'Communication' and 'Archive Service' from the example above are organization-specific groups.

3 Terminology

Each application always brings with it specific terminology. The table below provides a brief summary of the terminology within MediaHaven 2.0.

Terminology	Definition
Charging	During the upload process, items are placed on our servers. Please do not close the browser while this process is in progress.
Process	After loading, items are processed. During processing, a number of technical processes and checks happen in the background such as securely discarding the original file, generating a preview and extracting metadata.
Object(s)	Objects is a collective term for both items and collections. Thus, when we speak of an object, it can be either an item or a collection.
Item(s)	Item(s) is a collective name for all file formats that can be loaded. However, items can have different media types. For example, one item will be a photo, while another may be a video, audio clip or document.
Collection	A collection of thematically linked items with common metadata. The metadata of the collection is passed on to the underlying items.
Concepts	We distinguish two phases in which an object can be: the concept phase and the published object phase. Concepts are the charged objects that you are still working on for publication. Among other things, you can describe, submit or publish these objects.
Entry zone	Within the concept phase, input zones can be created to bring structure to the charged items. The input zone(s) to which a user belongs determines which objects are visible to that user on the concepts page.
Metadata	Metadata is information you can assign to an object such as a title, a description, a date and so on more.
Profiles	A collection of specific metadata fields configured for a classification within the user's organization.
Classification	A collection of metadata profiles (and fields) used to describe a specific type of imagery or theme.
Masterdetail	The master detail screen is used to quickly display and edit the metadata of an item. It is a scaled-down version of the full detail page.
Thesaurus	A thesaurus is a hierarchical structure where translations and synonyms can be specified for each label included in the structure. A separate metadata field can be configured for each component in the structure, making it possible to filter on this specific component of the entire structure.
Thesaurus suggestions	When using a thesaurus metadata field, suggestions can be added for terms not yet included in the structure. These suggestions are then submitted to an admin user for evaluation. He/she decides whether or not to include the suggestion in the structure.
User Groups	A group is a collection of users who can manage certain images, depending on the assigned rights (view, modify, export).
Public Portal	The public portal is offered as standard with a MediaHaven2.0 environment and allows a particular set of images to be viewed by the general public without requiring these users to log in. (See separate documentation for more details and available functionalities).
Import module	The import module can be used to give people who do not have access to the MediaHaven application the possibility to upload items and assign the necessary metadata. After completing an entry form (which is fully customised and managed by the client), the items end up in MediaHaven for further completion and later publication. (See separate documentation for more details and available functionalities).
Notifications	Notifications are informational messages that the system sends to a user within the application. For example, this is an informative message when an item that was submitted is published by a content manager.

Export location	An export location is used to export photos, videos, audio and documents. **An export location contains certain parameters such as size, format, watermark, subtitles, with/without metadata in the file or as sidecar, … .** When objects are exported using a predefined export location, these parameters are applied to the objects. An export location is always linked to one or more users. These users then have the ability to use this export location when they go to download, share or export objects. It is also possible to assign a mandatory reason to an export location. This ensures that users who choose that particular export location when downloading or sharing must assign a reason why they wish to perform the export. That reason may be predefined in the export location or a user may assign their own reason. When the export is actually performed, it will appear in the history together with the chosen reason. Through the monitoring website, an administrator can consult how many times a specific reason was chosen.
Download List	The download list contains all downloads and exports performed by the user within the active (login) session. Downloads in this list are only valid for 14 days. After 14 days the download can therefore no longer be performed.

4 Application Overview

4.1 Registration and deregistration

By default, the MediaHaven 2.0 website is a closed environment that you can only access using **a username and password**. When you surf to your organization's MediaHaven website, you'll land on **a login page**. As well as logging in with a MediaHaven account, you can also log in with a local Windows account or with an open authentication account (if this was set up during installation or via configuration). If open authentication services are available, they will be shown at the bottom of the login screen.

Once logged in, you can **also log out again at the bottom of the navigation bar**. After logging out you will be returned to the login page.

From the login page you can also **change** your **password** if, for example, you have forgotten it or simply wish to set a new one. After entering your e-mail address, you will receive a link with which you can change your password within 24 hours.

Note: Organizations with a public portal will automatically land on the public portal. From the portal, you can log in to the MediaHaven2.0 web application.

4.2 The Navigation Bar

On the left side of the application, **the navigation bar** is displayed. This contains a number of general pages such as the overview page, the 'all objects' page and the task list.

- **The overview page a.k.a. "Dashboard"** contains a general search bar which allows the user to search for an object regardless of its stage or status. These objects can be consulted via the "All objects" list. Furthermore, certain sublists are displayed on the dashboard to give the user a quick overview of the most important information. For example, he sees a sub-list of the most urgent tasks he has to perform and a sub-list of the last received notifications. He can also quickly navigate from the overview page to external links such as the management module, import module and monitoring website (if he/she has access to them).
- **The 'All Objects' page** contains every object regardless of its status or phase. Users can use this page to easily search for an object regardless of where it is in the system.
- **The task list** obviously contains only tasks. Since only tasks and no objects are shown on this task list, this page has no search bar and no filters. Users can run the open tasks there one by one.

In addition to the general lists, there are also sections per phase in the application, namely **the concept phase** and **the published phase**. These sections contain a number of subpages where one can consult objects with a specific status such as the upload list under the concept phase.

At the top of the navigation bar, **the 'Upload' button** is always displayed if the user's role allows it. From any page, you can use this button to upload items or create collections.

At the bottom of the navigation bar, a **"Selection"** section is also displayed. Here one can consult the selection created by the user for downloading or exporting objects from various searches. The individual downloads can also be followed up via the **'Downloads'** subpage.

At the very bottom of the navigation bar, a **Profile** section is also displayed. This section allows the user to unsubscribe again. The user can also consult his personal user profile and adjust preferences such as default display, number of results per page, default sorting, ... customize. These personal preferences are also kept after logging out. If the user has the function to manage the trash, the trash will also be visible under this item in the navigation bar.

In the center of your screen, **the selected page from the navigation bar** is displayed. Depending on the selected page, a list of objects or tasks is displayed. From these lists you can perform various actions or functions. These lists, actions and functions are discussed in more detail later in this manual.

4.3   List, grid or map view

Each page where objects are displayed can be shown in **a list ,** a **grid** or **map view**. This depends on the personal preference of each user. All actions you can perform on the list view, can of course also be performed on the grid and map view. Switching between the different views can be done via the icons at the top right of the page. A default view can also be selected via the user profile of the logged in user. The number of results displayed next to each other on the grid view depends on the screen width of the user. The number of results displayed on the full page can be adjusted at the bottom of the pages or in the user profile. The map view will only display the objects that have an address associated with them in the metadata. The user can zoom in and out on the map view to get a better look at certain clusters of objects, for example.

4.4   Back to search results

When you have opened the detail page or full view of an object after searching, you can easily navigate to the next and/or previous result in your search. You can also easily return to the search results using the link at the top of the screen.

4.5   Notifications

Notifications provide the user with information about certain objects. They ensure that the user knows what has happened to a particular object, but do not mean that any action is required from the user. When the user clicks on a notification from the dashboard, the system takes the user to the corresponding object. The user can delete the notifications manually from the dashboard or from the list of all notifcations (found in the Profile section in the navigation bar).

4.6   Application language

The Mediahaven landing page is always displayed in the default language of the browser being used. Once the user is logged in, **the application's interface** is **displayed in the language set for the user through the settings or through the user profile**. Also the metadata fields are displayed in the language of the logged in user.

5   Media Charging

5.1   Charge as single items

You can choose to manually upload one or more items separately in MediaHaven. This means that they can be managed as separate items in MediaHaven.

- Click the "Recharge" button from the navigation bar.
- Choose the 'As separate items' option from the dropdown menu.
- The system opens a pop-up screen where you have to make two choices.
    o First, choose the input zone* in which you want to load the objects.
    o Then choose the classification** to be used to describe the objects.
- When you click 'Next', the system will open your device's file server.
- You can now select one or more items you wish to charge.

Input zone: If the user belongs to only one input zone, this choice will be filled in automatically. The input zone will determine which other users may view and describe the charged images in the draft phase.

***Classification: If the user has access to only one classification, this choice will be filled in automatically. The classification will determine which metadata fields need to be filled in while describing the objects.*

The system shows you the progress of the upload via a message in the top right corner of the screen. Via this message or via the navigation bar, you can follow the charging in detail in the upload list.

5.2   Follow up on charging and processing

During the uploading process, the items are placed on our servers. **Please do not close your browser** while the upload is in progress, otherwise you will lose the items and have to reload them later. There is no limit to the capacity when uploading, but keep in mind that larger files may take a little longer to fully load and process.

The upload may fail because of the following reasons:
- **You are attempting to upload an item that has already been added to the system**. Since the item is already on our server, you can ignore the failed upload. You can access the already existing item via the link in the upload list.

  - o The program checks the files themselves and not the name using an MD5 check. If you rename the same item, the program will not accept it either because the item has still not changed. Uploading two different items with the same name will work.
- **The internet connection was lost during the upload process.** The items were not placed on our servers as a result. Please try again later when you have a more stable internet connection.
- **Not enough storage space is available.**The items are not placed on our servers. Please request additional space through your admin user and then reload.

If the upload fails, the error messages in the upload list (via the 'Concepts' menu in the nagivation bar) can be consulted. The upload list is emptied when logging out or closing the browser. Items that failed to be uploaded can also be manually deleted from the upload list.

After loading, the items are processed by the system. This means that the images are already securely recorded in the system, but are not yet ready to be metadata or published. The items currently have the **status "In processing"** and can be viewed in the concepts page. Please note that the concepts page is not automatically refreshed. Thus, the user must periodically refresh the page to view the most recent status of the item. Once the item has the status 'Invalid' or 'Valid', it is available for metadata editing.

During processing, a number of technical steps happen in the background. These steps may take some time depending on the item being loaded. Processing a video will certainly take longer than processing an item.

To understand why this processing may take a few minutes, we briefly explain the different steps:
- The original item is stored away on multiple servers so that it is securely archived.
- A preview and a thumbnail are generated. These are lower resolutions of the item to display in the web application.

- Metadata contained in the file is extracted and transferred to the corresponding fields in Mediahaven.
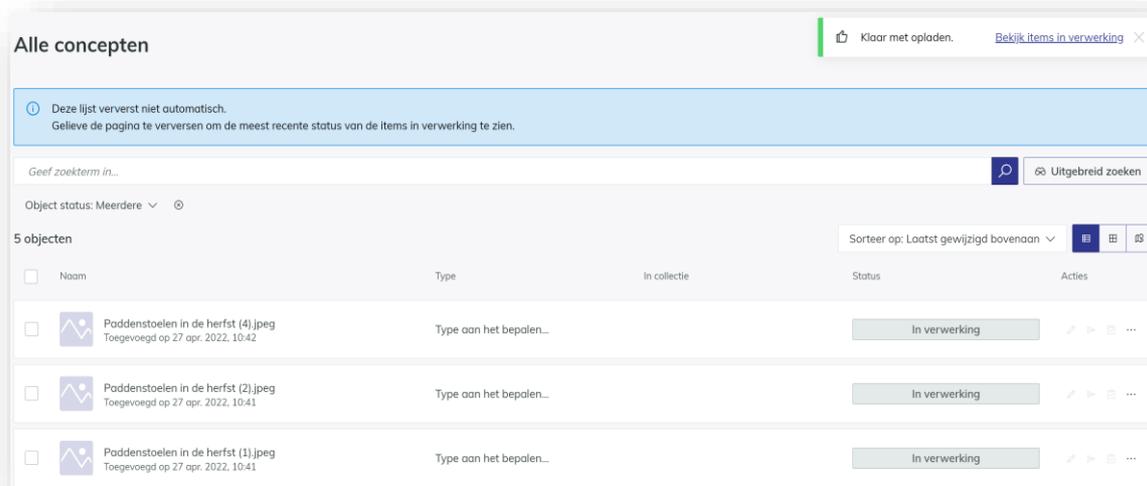
You can cancel processing by deleting the item from the drafts page.

If something goes wrong during processing, the status of the item in question will be displayed in red in the drafts page. Through the actions on that item, you can consult the corresponding error message and contact the administrator of your environment to fix the error.

5.3   As part of a collection charge

Multiple items can also be loaded directly as part of a collection. **A collection is viewed as a collection of items that are thematically related and contain much common metadata**.

Loading items as part of a collection ensures that items can be grouped and that certain metadata, entered on the collection, is automatically transferred to the underlying items. This saves the user a lot of time for metadata of the underlying items and can also help with the retrievability of certain objects around the same theme.

5.3.1   What is inheritance of metadata?

When you add one or more items to a collection, no matter what stage or state the items or collection are in, certain metadata from the collection is inherited to the underlying items. Inheritance always occurs when the value of the underlying item for that particular metadata field is equal to the value of the parent, i.e., the collection.

> For example: The title of the collection and its underlying items is "Carnival 2020. Thus, the value of the underlying items is equal to the value of the parent. When we change the title of the collection to 'Carnival 2020', the inheritance will change the title of the underlying items to 'Carnival 2020'.

This also means that the inheritance is no longer applied when it was broken.

For example: Title of the collection and underlying items is 'Carnival 2020'. If we change the title of the collection to 'Carnival 2020', the title of the underlying items will also change to 'Carnival 2020'. However, if we have manually changed the title of one of the underlying items to 'Parade car De zotte dozen' and then change the title of the collection to 'Carnival procession Aalst 2020', that one item will keep its own title and thus no inheritance will be made because it was already broken.

The metadata fields that can be inherited from the collection to the underlying items are configured by Zeticon in consultation with the customer.

5.3.2   Some rules regarding the collections

Because in MediaHaven2.0 we have linked a new functionality to the collections, namely inheritance, some rules have been defined:

- **An item and the collection to which it belongs must always have the same classification**. However, they can be loaded in a different input zone.
- **An item can only belong to one collection!** This is due to the inheritance of metadata. Through metadata fields (including e.g. the standard field 'Album') you can make items belong to multiple themes, categories or groups. Using metadata instead of collections also gives an additional advantage to the findability of the objects by different users.
- **It is possible to give multiple collections the same name.** However, be careful with this so that it remains clear to users which collection and content it is specifically about.
- **There is no maximum on the number of items allowed in a collection.** In other words, you can add as many items to the collection as you want.
- **No order can be manually determined for the items in a collection.** By default, the items in a collection are sorted by 'Date Uploaded'. If several items are uploaded at the same time, the system will sort the underlying items by relevance.
- **It is possible to choose a cover photo for the collection.** Go to the content of the collection and choose the action 'Choose as cover photo' for the item you want as the cover for the collection. This will show this item as a preview in the collection in the list and grid views.
- **You can take one or more items back from the collection.** This can be done individually for one item or can also be done in bulk. When performing this action, a confirmation question is always displayed.

5.3.3   How do I create a collection?

A collection can be created in different ways. For example, if you want to upload items that belong to the same theme and have common metadata, you can create a new collection for this purpose and then add the items to it. But you can also start from items that have already been uploaded. These items may still be in the concept phase, but may also have already been published. And of course you can also work the other way around by first creating a collection and then later adding new or already uploaded items to it. All possibilities are explained below.

1. *Create new collection and upload new items into it*

In Mediahaven2.0, you can very easily create a new collection and directly upload the new items into it.

- Click the "Recharge" button from the navigation bar.
- Choose the "As part of a collection" option from the dropdown menu.
- The system opens a pop-up screen where you can choose to create a new collection or to upload items to an existing collection. In this case, choose a new collection.
- The system opens a new screen where you can enter the collection's metadata.
  o Don't forget to choose the zone and classification for the collection here!
- Fill in the necessary details and click 'Save'.

The collection has been created and does not contain any items at this time. You can already access the collection on the concepts page as of now. Read on below to add items to the collection.

- Continue from the previous flow or open the collection from the concepts page.
- Click on the "Charge" action in the center of your screen or use the "Charge Items" action at the top of the screen. Both actions produce the same result.
- The system opens the file server of your device. In it, select one or more items you want to upload and confirm.
- Select the input zone in which the items are to be charged.
- The items are automatically given the same rating as the collection.
- Then click on "Next.

The system will show you the progress of the recharge via a message in the upper right corner. If the upload was successful, the items are processed by the system. If the upload was unsuccessful, the items are displayed in the upload list with the corresponding error message. When the processing is completed successfully, the items are individually visible in the drafts page. Refresh the collection content page to view the uploaded and processed items.

2. *Create a collection of already charged items in concept*

If you have already uploaded a number of items in Mediahaven2.0 and only later realize that they belong to the same collection, you can easily create a new collection from the concepts page.

- Go to the actions of an item or select multiple items in concept (of the same classification) that do not yet belong to a collection and choose the action 'Add to collection'.
- The system will open a pop-up window where you can choose whether to create a new collection or add the items to an existing collection. For this use case, we wish to create a new collection. After that, click next.
- The system will now open a screen to create the collection. Choose the zone in which you want to create the collection and fill in all the necessary metadata.
  o The collection is automatically given the same classification as the items you want to add to it.
- Then click on "Save.

The collection has been created and already contains the item or items you left to perform the action. Inheritance is applied here.

  3. *Create a collection of items already published*

If you have already published a number of items in MediaHaven 2.0 and only later realize that they belong to the same collection, you can easily create a new collection from the published media.

- Go to the actions of a published item or select multiple published items (of the same classification) that do not yet belong to a collection and choose the action 'Add to collection'.
- Follow the same steps as described above for creating a collection of already loaded items in draft.

The collection was created and already contains the item or items you left to perform the action. Inheritance was also applied here.

  4. *Upload and add new items to an existing collection*

A collection can also be created the other way around, by creating a collection first and adding items to it later. If you have previously created a collection and it is not in the evaluation flow, you can still upload additional items directly into the collection.

**From the general "Upload Media" button.**

- Click on the "upload media" button and choose the "as part of the collection" option.
- The system opens a pop-up window. Check the "Choose existing collection" option.
- Select the collection (in draft or published) you want to add items to and click the Next button.
- Choose the input zone for the items you wish to charge. The classification is automatically chosen based on the classification of the selected collection.
- The system will open the file server of your device. Select one or more items you want to upload and confirm.

The system will show you the progress of the recharge via a message in the upper right corner. If the upload was successful, the items are processed by the system. If the upload failed, the items are displayed in the upload list with the corresponding error message. If the processing is completed successfully, after **refreshing your screen, both the newly uploaded items and the previously uploaded items** are **displayed in the collection detail** and the new items are also visible separately on the concepts page. Inheritance is also applied here.

From the collection

It is also possible to add new items to a collection in concept by starting from the collection in question. To do this you use the action 'Upload items' which is always visible in the details page of a collection.

Note: When you upload new items into a published collection, the system checks to see if the items contain invalid metadata. If so, the item in question will be given the status "Invalid". The collection remains published but is temporarily not editable. As soon as the invalid item is published, the collection is editable again.
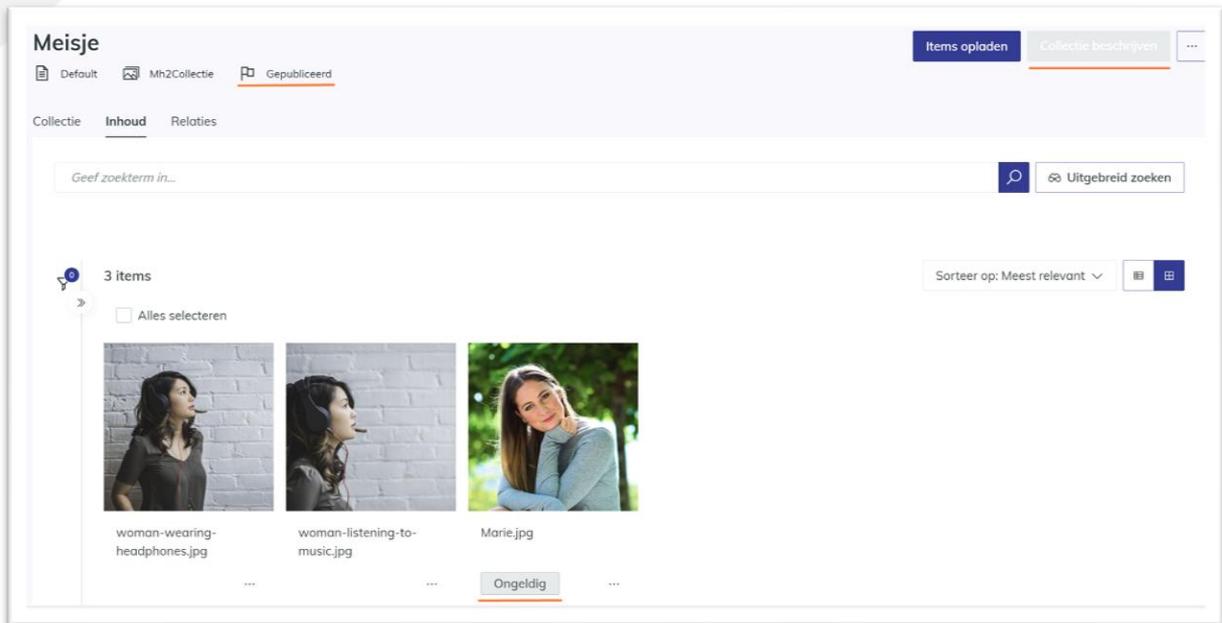
5. *Add item in draft to an existing collection*

If you have previously created a collection (in concept or published), you can still add items that are in the concept stage to that collection.

- Go to the appropriate item on the drafts page and choose the 'Add to collection' action.
- The system opens a pop-up screen where you can select an existing collection (of the same classification). Select a collection and choose the action 'Next'.

Is it a collection in concept? Then the item is added to the collection. The items you add to a collection in this way have the same classification as those of the collection and therefore inheritance is applied. You can further metadata the items and the collection before they are submitted or published together.

Is it about a published collection? Then the item is added to the collection and the system checks the validity of the item. If the item is invalid, then the published collection is temporarily uneditable until the item is validly published. The items that you add to a collection in this way have the same classification as the collection and therefore inheritance is applied.

Of course, you can also **add multiple items from the concepts page to a collection** by selecting them and choosing **the bulk action 'Add to collection'**.
Attention: the action 'Add to collection' is not visible once you have selected an item that already belongs to a collection or when selecting a collection!

6. *Add published item to an existing collection*

You can easily add one or more published items to a collection in draft or published collection.

- Go to the corresponding published item and choose the action 'Add to collection'.
- The system opens a pop-up screen where you can select an existing collection (of the same classification). Select a collective and choose the action 'Next'.

Is it a collection in concept? The item is added to the collection and will be included in the evaluation flow. The items you add to a collection in this way have the same classification as the collection through which inheritance is applied.

Is it about a published collection? Then the item is added to the collection. The items you add to a collection in this way have the same classification as the collection so inheritance is applied.

Of course, you can **also add multiple published items to a collection** by selecting them and choosing the **'Add to collection' bulk action**.

Attention: the action 'Add to collection' is not visible once you have selected an item that already belongs to a collection or when selecting a collection!

6   Describe

Describing or metadata is the action we perform to enrich the object with metadata (or additional information). Metadata is information that can be assigned to an object, such as a description, a date of creation, a location, but also completely customer-specific information depending on the needs within the organization. By assigning metadata, an object can be retrieved easily and quickly.

Certain information is automatically extracted from the metadata when processing items (e.g. location, photographer, etc.) other metadata is entered manually. The EXIF metadata of an item is displayed in a separate tab 'Exif'. The manually entered metadata is determined based on the **classification** chosen during upload. That classification ensures that a number of metadata fields are available while describing an item. Often one classification is used to describe a certain type of content. Think, for example, of all the technical image material that requires different metadata than, for example, archival or heritage material. The organization can determine which users have access to a particular classification. Some important rules about classification:

-   An object can be described by only one classification.
-   The classification of an object can no longer be changed.
-   The classification of an item must always be the same as the classification of the collection to which the item belongs.

A metadata field contains the actual information we assign to the object. The metadata fields are configured by Zeticon for the customer based on the specific needs and requirements of the customer. The following issues are taken into account:

-   What is the desired label of the field?
-   What is the help text that we should display with the field? This will make it clearer to users what is meant by a specific field.
-   What type of field is it? E.g. a free text field, a multi-select, a dropdown, ...
-   Is the field required to be filled in?
-   Should the field be searchable via the general search bar?
-   Should the field be searchable via the advanced search?
-   Should the field be displayed as a filter?
-   Is the content of the field inherited from the collection to underlying items?
-   May the field be displayed on the public portal?

6.1   Common metadata assignment via 'Describe Together'.

When multiple items are loaded and processed, the user can assign common metadata. This is usually the first step and ensures that this information is added to all selected items. Afterwards, of course, you can assign more specific metadata per item.

-   Select one or more items in the concepts page via the selection boxes. The selection can be done easily via the CTRL or SHIFT key.
-   Click on the "Describe Together" action in the action bar that appears at the top.

- The full details page will open where you can access and browse previews of all selected items. Fill in the necessary metadata.
- Click on "Save.

Note: When you have selected a collection, the action 'Describe together' will not appear in the action bar. Collections have to be described separately.

The full detail page of the describe together may contain previously entered or automatically extracted information. So please pay attention to the following:

- In the fields that already contain different information, the message *<Different values> will* be displayed. When you change these fields, the previously entered information will be overwritten.

- For fields where you can select multiple items (e.g. Reuse), you may have designated different values for the selected items in this field. This is shown as follows:

  ✓ : This value was indicated for all selected items.
  – : This value was indicated for one of the selected items.

- If the description is incomplete, the system will display an error message and display required fields. All mandatory fields must be filled in before you can submit or publish. You can save the changes already made and fill in the required metadata later. Pay attention to the status of the items. If the status is 'Invalid' you have not yet filled in one or more mandatory metadata fields. If the status is 'Valid' you can continue with submitting or publishing the object.

6.2   To describe an item separately

Before or after describing together, a user can assign additional metadata to an individual item. This can be done in several ways. If the changes are minor, the master detail screen can be used. If one wishes to make more changes, the user can consult the full detail screen.

6.2.1   Making quick changes via the master detail screen

The master detail screen is used to quickly display and edit the item's metadata. The user can access the master detail screen by clicking in the white frame around an item (both in drafts and published media). The screen will split into two parts: the left part still contains the list or grid view of items, the right part contains the master detail view. All fields included in the classification will also be shown in the master detail view.

- Quick changes can be made via the 'Describe' action.
- The "Show More" link at the top of the master detail screen can be used to navigate to the item's full detail page.
- Using the actions at the bottom of the master detail screen, you can also submit/publish, share and delete the item.

6.2.2   Modify more metadata via the full details view

Describing an item can also be done via a full detail screen. On this screen you get to see the preview of the item along with all the metadata fields included in the classification.

- Using the 'Describe' action on an item, go to the full detail page.

You can fill in the fields immediately and save the completed information afterwards. All mandatory fields must be filled in correctly before you can submit or publish the item, but it is perfectly possible to save changes without filling in all fields. **When one or more mandatory fields are not filled out**, the system will show an error message at the top of the page and **the object will get the status 'Invalid'. After filling in the mandatory metadata, the object gets the status 'Valid'** and can be submitted or published.

6.2.3   Other possibilities while describing an item

From the full detail view, one can **also view the item larger**, especially across the entire page. This can help to access more details on the item and assign the associated information as metadata.

Furthermore, while describing, you can also **quickly navigate to certain profiles** by using the tabs at the top of the master detail screen or at the top of the full detail page.

Beschrijving   Datum & Maker   GDPR & Hergebruik   Rechten   Locatie   Albums   Technische informatie

While describing **a video or audio file, the item can be played back** so that the user can see or hear what the item is about. This allows for more accurate completion of the item's metadata.

6.3   Describing a collection

When creating a collection, certain metadata is already filled in by the user. This metadata can be changed at a later time so that the correct and complete information is linked to the collection.

- Go to a collection (in draft or published) and click on the "Describe Collection" action.
  - o   Please note, with a published collection, this action is only available if you have edit rights to the object.
- The system will open the collection detail page in edit mode. Complete the necessary information or change metadata as needed.
- Click on "Save.

Note: All mandatory fields must be completed correctly before you can submit or publish the collection and its underlying items. **As long as the required fields are not filled out**, the collection will get **the status 'Invalid'** and an error message will be shown at the top of the details page. **Once all mandatory fields are filled in, the collection gets the status 'Valid'**.

## 6.4   Assigning metadata using a thesaurus

A thesaurus is a hierarchical structure of terms where translations and synonyms can be specified for each label or concept included in the structure. In MediaHaven 2.0, the thesaurus can be used when describing objects.

6.4.1   Managing a thesaurus

Before the thesaurus can be used during description, the thesaurus structure must be formatted in the system. After the structure has been formatted, the relevant metadata fields can be linked to one or more components from the structure.

Formatting thesaurus structure

Before diving into the software, each customer must draw up a complete hierarchical structure for their own organization. Once this is done, the structure can also be configured in the application. For this we use an external application that is linked to the customer's MediaHaven 2.0 environment. The actual setting up of the thesaurus is done by Zeticon. To give you an idea of what such a hierarchical structure might look like, we've added a fictitious example below.
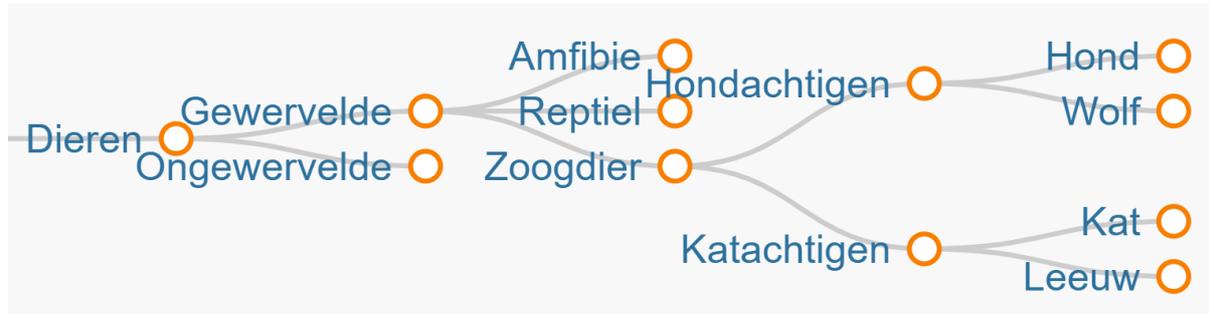
A unique ID is assigned for each label (or also called 'Concept') in the structure. This ensures that changes to the view table of a concept can be performed in a relatively easy way. In addition, it is also possible to assign alternative labels (or synonyms) and translations per concept.

The fictional example below shows the alternative terms and translations for the concept of "Dog.

Linking metadata fields

After the thesaurus is configured, one can create the corresponding metadata fields. This allows users to create specific metadata fields per component of the structure. This, of course, allows for very specific searching and filtering on those components. These fields can be configured in several ways, viz:
- A metadata field is associated with one or more levels within the structure.
- The user can add one or more values as metadata in that particular field.

6.4.2   Using a thesaurus

Once the thesaurus and associated metadata fields have been configured correctly, the thesaurus can be used when describing objects. Naturally, the selected values from the thesaurus can also be searched after the description.

Describing objects with a thesaurus metadata field

Depending on the field type chosen (single- or multi-select), the user can select one or more values from the underlying level in the drop-down list and add them as metadata to the object.

If the user previously wishes to navigate through the structure associated with the field, they can click on the "Consult Structure" link. In the pop-up screen, you have the option to search for a specific value via the drop-down list or you can open and close each level to select the desired value.

When storing the metadata, the translations and synonyms associated with the added term are also added as metadata on the object. When the user consults the read-only page of an object, he can consult the added values and associated translations and synonyms. Because the synonyms and translations can be quite extensive, they are not displayed by default. Via the information icon next to each term you can consult the synonyms and translations.

Add suggestions for new terms to the thesaurus.
If during the metadata process you want to add a term that is not yet included in the thesaurus structure, you can simply submit the desired term as a suggestion for that particular metadata field.

- Type the desired term in the appropriate metadata field.
- Click on the link "No results. Submit as a suggestion?".

This will immediately include the suggestion in the system even if you have not yet saved the changes to the metadata, but the suggestion will not yet be shown on the read-only detail page of an object. The admin user and content administrator (with the function to evaluate thesaurus suggestions) get a task in their task list to evaluate the suggestion.

- Open the task. It contains information about who created the suggestion, at what time the suggestion was added, and what metadata field the suggestion is associated with.
- If you do not wish to include the suggestion in the thesaurus, click 'Delete' and confirm.
- If you do wish to include the suggestion in the thesaurus, click 'Add'.
    o The system opens a pop-up window where you can choose at which level of the structure associated with that particular metadata field you wish to add the suggestion.
    o Select the desired level and click 'Add'.
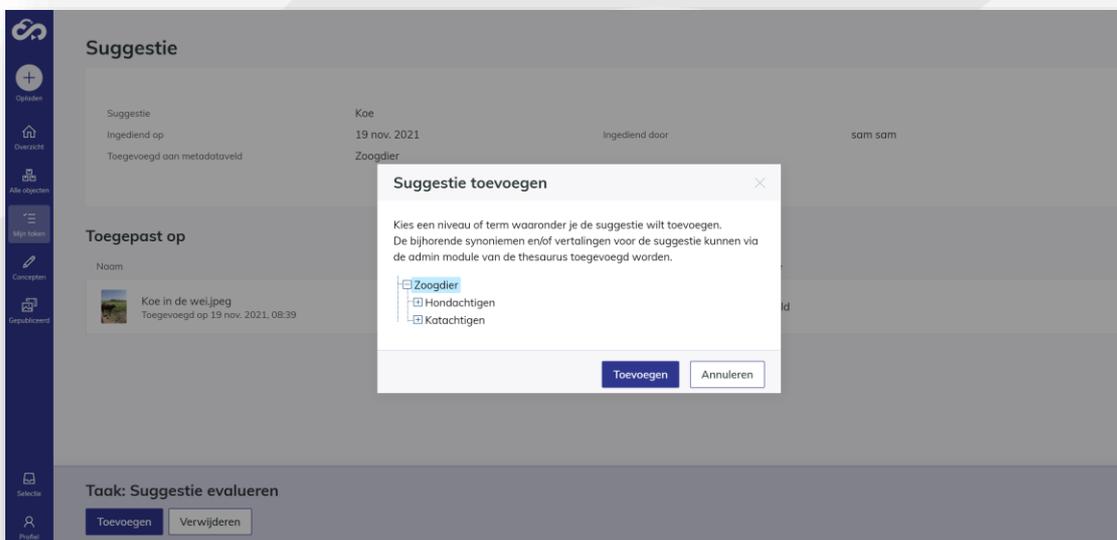
The task is closed and the suggestion is included in the thesaurus at the level that was chosen. Other users who subsequently start metadata will now see the new term defaulted to the drop-down list of that particular metadata field. The new term is of course also assigned as metadata on the object(s) for which the suggestion was made. So from now on, that new term will be visible on the read-only detail page of that object.

Search by thesaurus values.

The end users can use the general search bar, filters or the advanced search to search on the terms from the hierarchical structure. It is also possible to search on the translations and synonyms of the concepts in the hierarchical structure.

6.5 Assign automatically generated keywords

Thanks to an integration with software that generates **automatic tags**, we can display these tags or keywords in MediaHaven 2.0. This ensures that the user will see some keywords automatically as suggestions. The automatically generated tags are built by a software application and thus may contain errors. Therefore, we chose to give the user who is describing the object the choice of whether or not to add these keywords on the object. As long as the keywords are not added, the object will not be found when people search on those terms.

Adding the automatically generated keywords works as follows:
- Load items into MediaHaven 2.0 and let the system process them.
- Click on the 'Describe' action from the drafts page once the items have been processed.
- Under the default field 'Keywords' a new field 'AI Keywords' has been added (if configured). This field displays the suggestions suggested by the integrating software application.

- Click the check mark within the gray box of the suggestion to add the term as a keyword.
  o When the term was added, it will be added at the bottom of the 'Keywords' field in a blue box.
- Or click on the cross within the gray box of the suggestion to remove the term.
  o As a result, the term will not be assigned and therefore the object cannot be found again if someone were to search on that term.

Attention:
- The automatic tags are shown only for images and therefore not for videos or documents.
- This functionality must be activated by Zeticon for the customer so we can configure the associated metadata field to display.

7 Evaluate and correct

After describing or metadataing an object, an evaluation flow can be used before the object is published. Thanks to this approval process, a quality check can be performed on the uploaded objects and their associated metadata. Not every user needs to use this evaluation flow. A content manager will also be able to publish the objects directly. See below for more information on direct publishing.

The diagram below shows the complete evaluation process.
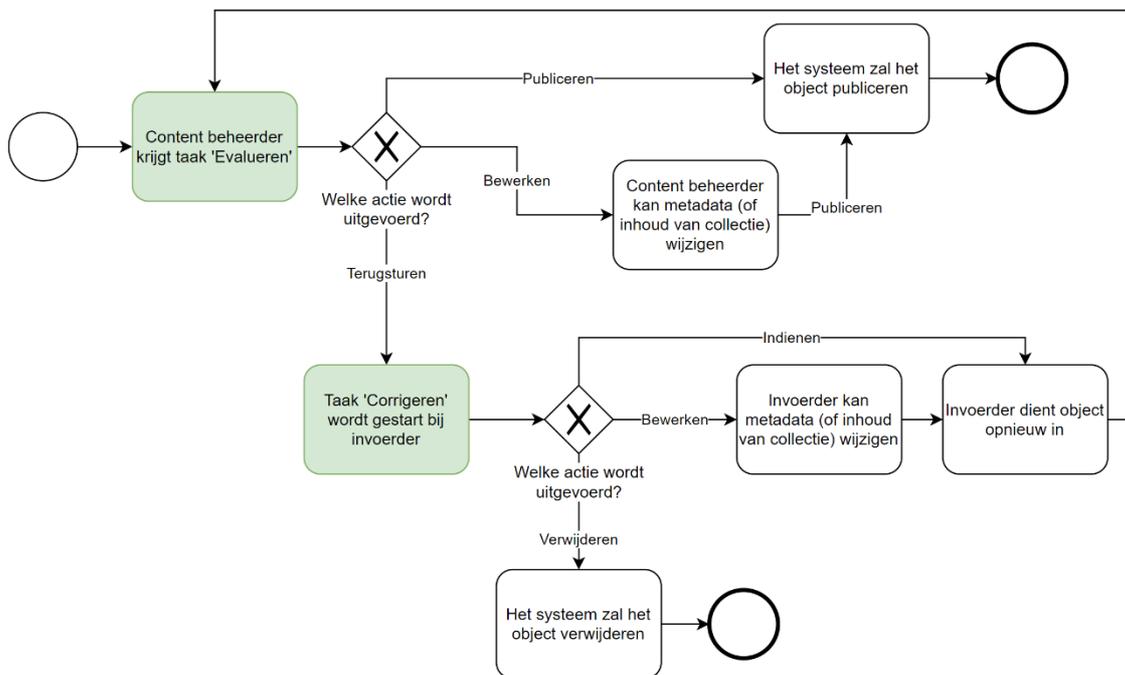
1. A user (role: importer) has loaded and metadata an object. He/she **submits the object for evaluation**.
2. The content manager is given a task to **evaluate the submitted object**. He/she can perform one of the following actions:
   a. **Approve** the objects so that they are published and thereby visible to other users within the application.
   b. **Adding to** the objects themselves **or editing metadata**.
   c. **Return** the objects because they are insufficiently described. For this, the content manager must enter a justification. When the object is returned, a new task is generated for the importer that had submitted the object. That task consists of **correcting** the object after which it can be resubmitted and the evaluation flow repeats.

7.1 Submit an item or collection

Submitting an object is the first step in the evaluation flow and is performed by the user who does not have the ability to publish, i.e. the role 'Importer'. Submitting will cause a task to be started in users with the 'Evaluate' function, i.e. the 'Content Administrator' role.

Submitting an object is done from the concepts page or the details page of an object in concept and can be done separately and in bulk.
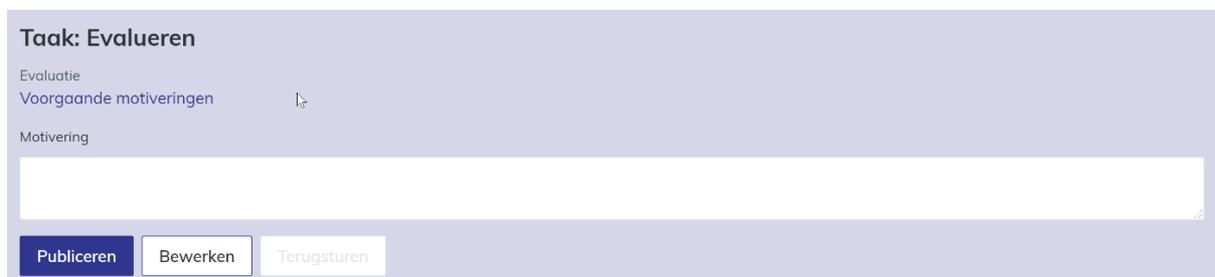
After submission, the object is given the status 'Submitted'. The object remains visible in the concept page, but is temporarily not editable.

Note: The items that belong to a collection cannot be submitted separately because we always start from the principle that a collection should be evaluated as a whole. In other words, **when submitting a collection, all the underlying items are also submitted**. As a result, both the collection and the underlying items are temporarily uneditable.

7.2   Evaluating an item or collection

After an item or collection is submitted, it can be evaluated. This ensures that all metadata can be checked for completeness and correctness before the item is published. In the case of a collection, the content manager can also evaluate the content (the underlying items).

- Go to the task list.
- Open an object with the task 'Evaluate'.
- Perform the task by choosing the desired action.

The evaluator may:

1. perform the **"Publish"** action. This will give the object the status 'Published' and make it available to other users on the 'Published media' page according to the assigned permissions. The object is then no longer visible on the concepts page.
2. Perform the **"Edit"** action.
   a. If the user was evaluating an item, the item's detail page will open in edit mode and the user can change metadata. He will then return to the task.
   b. If the user was evaluating a collection, the collection detail page will open in edit mode and the user can change metadata. He will then return to the task. Of course, he can also navigate to the underlying items of the collection via the 'Content' tab and change metadata there as well via the 'Describe' action on the respective item.
3. After completing a justification, perform the **'Return'** action. This gives the object the status 'Returned' and starts a task at the importer to correct the object. The justification that was entered will be saved when the user navigates to another tab in the collection or leaves the task for a while. Attention, it will only be saved within the current login session of the user! It will also be visible to the importer when performing the task 'Correct' after the return.
4. **Consult** the (if any) **previous justifications**. When an object is submitted for evaluation for a second time, after the importer has made corrections for example, the user who has to perform the evaluation task can consult the previous justifications. This way he

knows why the object was returned earlier and can therefore perform the second round of evaluation in a more targeted way.

7.3   Correcting an item or collection

When an object is returned for correction, the task 'Correct' must be performed. In this task, one can edit the object's metadata, add items to a collection or remove items from the collection to make necessary corrections or additions.

- Go to the task list.
- Open an object with the task 'Correct'.
- Perform the task by choosing the desired action.

Taak: Corrigeren

Motivering
Voeg je nog een beschrijving en trefwoorden toe zodat het item beter teruggevonden zal worden?

[Indienen]   [Bewerken]   [Verwijderen]

The user can:
1. **Editing** the metadata of the item. The system opens the detail page of the item or collection in edit mode so the user can make changes. Afterwards, he returns to the task.
2. **Resubmitting** the object**.** The object can be resubmitted to be re-evaluated. Of course, it makes sense to perform this action only after editing the metadata or content of the object.
3. **Deleting** the object**.** The object can be deleted so that it is no longer available in the MediaHaven environment and therefore cannot be included with published media.

7.4   Publish

Once the items have been provided with metadata and the user has the 'Publish' function, they can be published. This means that they can now be consulted by others according to the rights granted via user groups.

Publishing an object is done from the concepts page or the details page of an object in concept and can be done separately and in bulk.

The objects get the status 'Published'. As a result, they are no longer visible on the draft page, but from now on you can find these objects under 'Published media' in the navigation bar.

Note: The items that belong to a collection cannot be published separately because we always start from the principle that a collection should be treated as a whole. In other words, **when publishing a collection, all the underlying items are also published**. This means that both the collection and the underlying items are no longer visible in the concepts page.

Note: When you publish from the detail page of an object, any changes to the metadata are also saved. This way you don't have to save before you can publish but can perform the action immediately after describing.

7.4.1 Consultation of published objects

Of course, after publishing an object, one can still consult the details page with the associated metadata. This page will always show a preview of the object with the corresponding metadata as it is during the description.

Also with **published items,** you have the option to display the preview over the full screen. To do this, click on the thumbnail of the item you wish to view. From that full screen view you can zoom in and out and rotate the preview. Note: the rotation is not saved so the next time you consult the preview it will be displayed again as it was originally. You can also have a **video or audio file** played in your browser. In case of **a document** you can consult the keyframes or pages of the document in the 'content' tab. By clicking on one page it will be displayed in full screen and you can navigate to the next or previous page.

The metadata of a published item can still be edited if you have edit permissions on the respective object through the user groups.

When accessing **a published collection**, one can access both the metadata and the content of the collection. This can be done using the tabs 'Content' and 'Collection' or via the actions 'View content' and 'View metadata'. Of course, you can also edit the metadata of a collection if you have edit rights on the object in question.

7.4.2 Contact the administrator about a published object

If you as a user do not have sufficient rights to perform a certain action on a published object (for example, adding extra metadata or downloading the original file), you can contact the administrator via e-mail from your mail server. The e-mail can be followed up and dealt with completely outside MediaHaven, and by default contains the title and a link to the object in question.

The email will arrive at the email address that was configured for the respective organization during startup or a subsequent consultancy assignment.

When the recipient of the e-mail clicks the link, he/she will first have to log in if this was not already the case. After logging in and if the recipient has reading rights to the object in question, the detail page will be displayed.

7.4.3 To consult the location of an object

During the metadata process, a location can be assigned to the object. That location can be consulted on a map from MediaHaven.

Entering the location during the metadata process can be performed in several ways. The user can manually enter an address and the system will automatically look up the corresponding GPS coordinates in GoogleMaps. The user can also enter the GPS coordinates himself and the system will look up the corresponding address in GoogleMaps. Or the user can look up the location via a map.
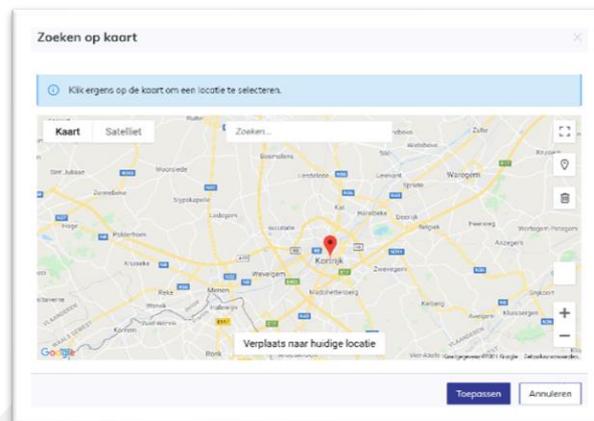
When you click on the **"Search by Map"** link, a pop-up window will open showing a GoogleMaps map.

- The user can now search for the desired address using the search bar at the top or he can move the map, zoom in and out and select a point on the map.
- Click 'Apply' to save the selected point as an address on the selected object.

After entering the location, it will be converted to a link so that you can immediately access it on a GoogleMaps map. The system will open a map view on which you have the same possibilities as with GoogleMaps. In other words: you can zoom in or out, you can change between map and satellite view, ... You will also see on the map the objects in the vicinity of the item in question.

7.4.4   Viewing the history of a (published) item

In addition to the metadata, relationships, hierarchy and other tabs, you can now also consult the history of an item. On this tab of the detail page all actions that were performed on the item are logged. Besides the type of event or action you can also see when the action was performed and by which user or actor. For some actions or events additional information is also displayed in the comment column.

26 jul. 2022, 10:45:16	system@webdev-qa	Metadata van object is geüpdatet.
26 jul. 2022, 10:45:16	TRANSCODER (mediahaven)	Transcodeer job is voltooid.
26 jul. 2022, 10:45:09	TRANSCODER	Transcodeer job is aangemaakt.
26 jul. 2022, 10:45:09	WORKER_DAEMON	Opslagruimte toegewezen voor voorbeeldbestand.
26 jul. 2022, 10:45:07	system@webdev-qa	Metadata werd geëxtraheerd van het bestand geassocieerd met het object.
26 jul. 2022, 10:45:06	WORKER_DAEMON	Bestandsformaat is gecontroleerd.
26 jul. 2022, 10:45:06	WORKER_DAEMON	De gegenereerde MD5 van het bestand is vergeleken met de referentie.
26 jul. 2022, 10:45:06	WORKER_DAEMON	Viruscontrole is uitgevoerd.
26 jul. 2022, 10:45:05	system@installation	Bestand is succesvol gearchiveerd.
26 jul. 2022, 10:45:05	WORKER_DAEMON	Bestand is verplaatst naar andere opslagplaats.
26 jul. 2022, 10:45:02	sam	Object aangemaakt vanwege een upload.
26 jul. 2022, 10:45:02	sam	Object is aangemaakt.

8   Search, filter and sort

As soon as the objects are loaded in the system they can be searched. Obviously, you will only be able to search on all assigned metadata after describing objects. Before describing, you can mainly search on technical metadata or metadata derived/filled in by the system. When searching, we recommend not only working with free search terms that you enter in the search bar. Be sure to also use the filters and/or the advanced search to start refining your search.

All options for searching, filtering, sorting and saving searches are explained in more detail below.

8.1   Searching with free search terms

On all lists where we show objects in the application, you can search with free search terms. This means that you don't have this functionality on the task list. Also on the dashboard you can search with free search terms. This will take you to the 'All objects' list. This list searches for objects regardless of where they are located in the application.


- Enter a search term in the general search bar at the top of a page.
- Press the ENTER key or use the button at the back of the search bar to add your terms to your search.

The results will immediately adapt to the search query entered. However, there are some points to consider when searching with free search terms, namely:

- When you **type multiple terms in a row without** clicking ENTER **in between**, the system searches for the exact terms entered and in that specific order.

- For **verbs or diminutives**, the system will also always return objects that are metadata by the root of that word and vice versa. For example: If you enter the term "Bicycles" while describing, but someone else searches for the term "Bicycle" or "Bicycle" then he/she will also find the object that you have metadata with the term "Bicycles".

- The search bar is **NOT case sensitive**. If you have assigned a search term with a lowercase letter and someone searches for that term with an uppercase letter, they will also find that object.

- The system **searches all fields marked as generally searchable** in the metadata classification.

- **The page from which you start your search has an impact on the results you get.** If you search on the concepts page you will of course only get objects that are still in the concepts phase and to which you have read access, namely the input zones to which you belong. If you search the 'Published media' page, you will of course only see published objects in your search results to which you have read access via the user groups.

Do you wish to further refine your search with **an additional search term**?
- Then enter a search term again in that same general search bar.
- Then click the ENTER key again or use the button at the back of the search bar.
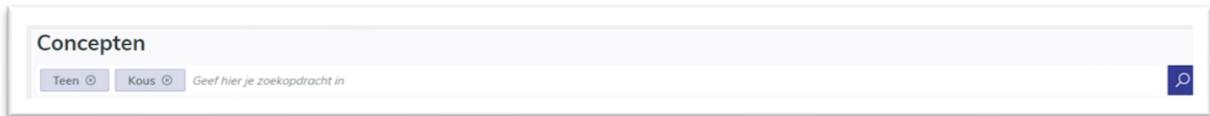
Concepten

Teen ⊗   Kous ⊗   *Geef hier je zoekopdracht in*

The results will immediately adapt to the entered search query. The system treats the terms entered as an AND relationship, which means that the search will be constantly refined and will show fewer results. In addition, you can combine the use of search terms with all other possibilities to search.

8.2 Refine search results with filters

Filters allow the user to search more specifically for certain objects and are available on all pages where we display objects. Designating a particular value in a filter will display only the objects that match the selected value for that particular metadata field. Note: The filters only contain values that are actually assigned to one or more objects in the system! So you will not see values that are not assigned to any object as metadata.

The filters displayed can be configured per organization. We always provide a number of standard filters such as the user who loaded an object, the zone to which the object belongs, the media and object type, ...

Next to each value within a given filter is always displayed how many objects there are with that particular value. If there are more values present than the default number we display (usually 10) then you can simply click the "Search the filter" link. This will open a pop-up window where you can search for a particular value within this metadata field yourself. You can do this by scrolling through the list of available values, but you can also enter a value in the search bar yourself. Via the autocomplete suggestions you get to see which values you can indicate.

In addition, you can also combine the use of filters with all the other possibilities for searching.

- Look in the left-hand 'Filter' bar to see which filter you need for the search you wish to perform.
- In the appropriate filter, indicate the value you wish to include in your search.
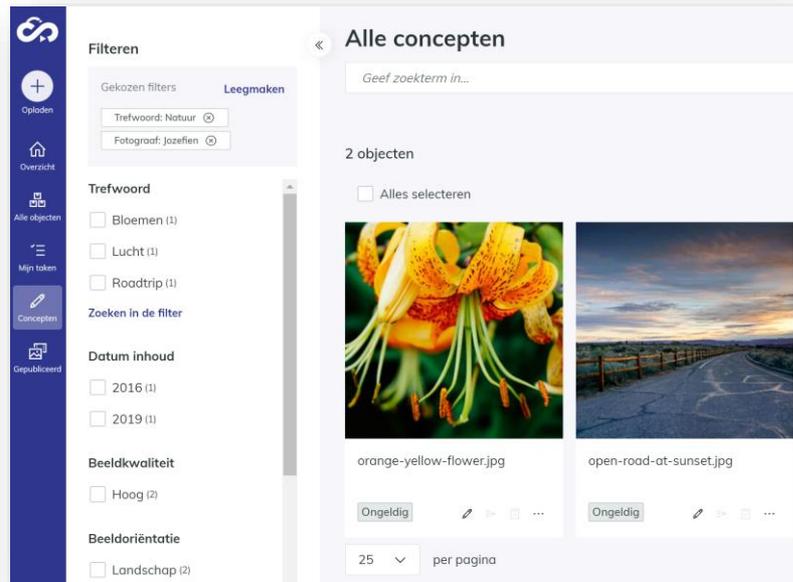
The results will immediately adapt to the selected filter and the selected filter and value will also be displayed at the top of the filter bar. If there are any values for that same metadata field that apply to the objects in your search results then the values that still apply will be shown in the filter.

Do you wish to further refine your search with **an additional filter**?
- Look in the left-hand 'Filter' bar to see which filter you need for your search.
- In the appropriate filter, indicate the value you wish to include in your search.

The results will immediately adapt to the entered search query. The system considers the selected values/filters as an AND relationship, so the search will be refined and will show less results.

8.2.1   Filter on date fields
For date fields, exact dates are not shown in the filter. The user can start or refine the search by indicating a year. Then the date filter will adjust to show all months within that year for which there are objects assigned in the system. The user can now further refine by choosing the correct month and finally he can also indicate the exact date in the filter.

Want to search faster on an exact date? Then use the advanced search on that specific date field (see below).

8.3   Refine search results with advanced search
The advanced search gives the possibility to indicate which field you want to search specifically. The list of metadata fields only contains fields that are known within the classification(s) and metadata profiles of your organization. In addition you can also choose whether to include or exclude the chosen value for that specific field in your search. When choosing that value, for certain fields you have an autocomplete functionality that will display suggestions after you type a few letters. For other fields, you have a dropdown list where you

can choose from all the values within that field. This functionality is also available on all pages where objects are displayed.

- Click on the "Advanced Search" button. You will find this button next to the general search bar.
- The system will open a pop-up screen where you can enter three columns.
  - Including/excluding: Should the value be included in the search or just excluded?
  - Specific Field: From the drop-down list, choose the specific field you wish to search on.
  - Value: Enter the value you wish to search for within the selected metadata field.
    - For free text fields, you can enter a value here yourself. For fields that consist of a drop-down list, you will be able to choose a value from that list during the advanced search. Date fields are discussed further in a separate section.
- Fill in the columns and click 'Search'.
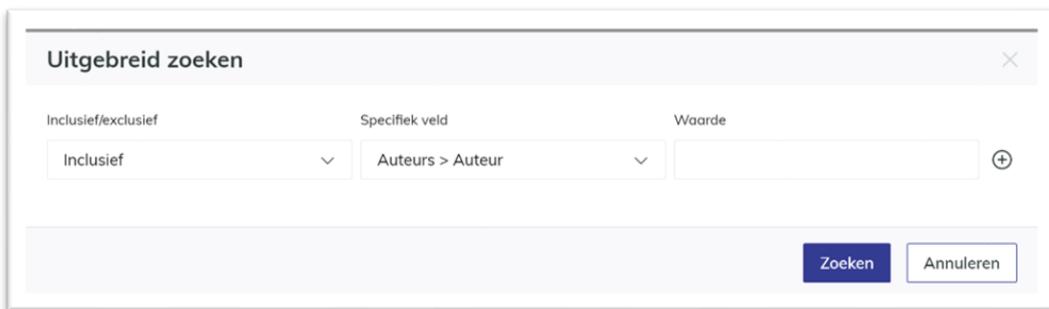
The results will immediately adapt to the search entered. The selected field and value will be displayed at the bottom of the general search bar.

Do you wish to further refine your search with **an additional extended search term**?
- Click on the 'Advanced Search' button again.
- Click on the + sign at the end of the line you previously included in your search.
- The system now displays an additional row of columns for you to fill in.
- Fill in the columns and click 'Search'.

The results will immediately adapt to the entered search query. The system considers the selected values as an AND relationship, which means that the search will be refined and will show fewer results.

8.3.1 Advanced search on date fields
The advanced search on date fields offers the user the possibility to search within a specific period. One can choose to enter the specific period themselves, but can also enter only a start date or only an end date whereby the system will show all obects from that start date or until the relevant end date.
- Click on the "Advanced Search" button.
- Look for a date field in the 'Specific Field' column.

- Open the drop-down menu in the Value column.
- Enter the desired period, start or end date and click 'Search'.
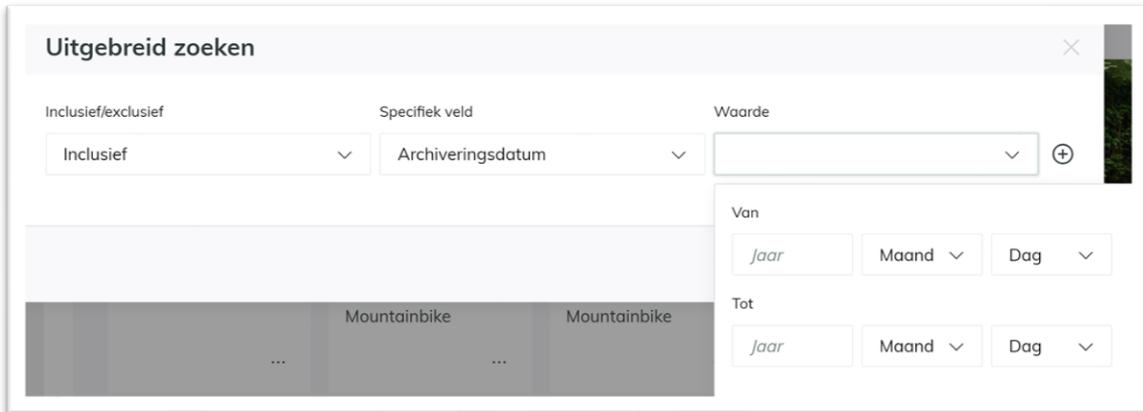
The results will immediately adapt to the search query entered.

Note: As a user, you do not always have to enter a completely specific date. You can also enter only years or year and month. In that case, the system will show all objects with a date between e.g. January 2018 and August 2019.

8.4   Sort search results

Within Mediahaven 2.0, concepts and published objects can be sorted by a number of predefined fields. This allows you to display search results according to the sorting indicated and helps the user find the right results.

The sorting options are displayed in a dropdown list on all pages where we display objects. This functionality is also available on the task list. From the list, the user can indicate the desired sorting and change it back later. The list or grid view immediately adapts to the desired sorting after selection.
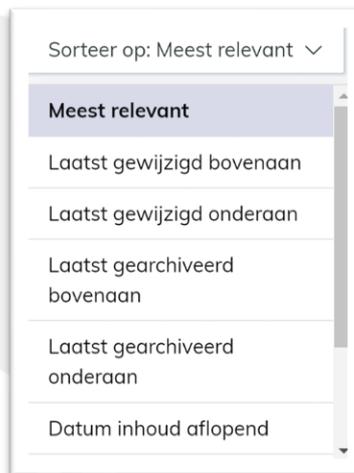
8.5   Save searches

If you as a user often search for the same terms or use the same filters, you can save this search. This ensures that you do not have to manually enter the search terms and filters over and over again, but that you can call them up as a whole to search for them again. Because

we save the search terms and filters instead of the result of your search, we can always show an up-to-date result of your saved search.

Please note: Saving searches and recalling them **can only be done from the "All Objects" page**! This is because you could include both results from the draft phase and from the published objects phase in your saved search.

8.5.1   Save search

Saving an entered search query is easy. After entering the correct terms, possibly in combination with one or more filters or advanced search, the user can save the search from the "All objects" page.

Saving a search involves giving the search a name and possibly sharing it with other groups within the organization. If you do not share it with other groups, the saved search will be visible only to you.

- Go to the "All Objects" page.
- Enter the desired search terms, filters and/or advanced search.
- Click on the diskette icon (save) next to the general search bar.
- Choose the "Save Search" option.
- The system opens a pop-up window. In it, give your saved search a clear name so that you know what search terms and/or filters are involved.
- Optionally indicate with which user groups you want to share this saved search. Note: you can only share the search with groups of which you are a member.
- Click on the "Save" action.

The system will display a message in the upper right corner of the screen when your search has been successfully saved. The searches you have created and shared with you through user groups can be viewed on the Saved Searches page. You can find this page in the navigation bar under your personal profile.

When a saved search is no longer applicable or no longer used, it can be deleted. This means that the saved search can no longer be used by all users who had access to it. This can be done easily from the 'Saved searches' page via the actions of the search in question. Before deleting, the user receives another confirmation question. It is also possible to delete one or more searches in bulk.

8.5.2   Use saved search during search

After you have saved a search query, you can of course recall it for use during your search. Please note that when using a saved search, all previously entered search terms, filters and/or advanced search will be overwritten by the chosen saved search. Using your saved search and then refining it with additional search terms is of course possible.

- Go to the "All Objects" page and click on the disk icon (save) next to the general search bar.
- Now choose the "Use Saved Search" option.
- In the pop-up screen, choose the name of the saved search you wish to recall.
- Then click on "Search.

The results will immediately adapt to the search terms and/or filters that were included in the selected saved search.

Using a saved search can also be done from the Saved Searches page. To do so, use the action on the search query in question. The system will then navigate to the "All Objects" page which displays the search terms and/or filters of the selected saved search.

9   Download, share and export

Once the objects are published, they can be shared, downloaded or exported for reuse in various ways within and/or outside your organization. The different possibilities are explained in more detail below.

9.1   Share with other users within the MediaHaven environment

If you want to share an item or collection with another MediaHaven user within your organization without having to download the object yourself, you can use the "Share" action. This action is also available on objects in the concept phase.

- Go to the desired object (item or collection) and choose the 'Share' action.
- The system will open a pop-up screen where you can access a unique link to that object. Click on the action 'Copy link to clipboard'.
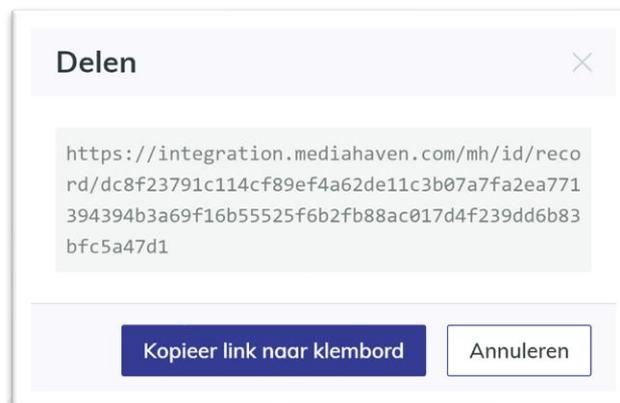
The link is copied to the user's clipboard and the pop-up window closes. **You can now paste this link into any other program (e.g. Outlook, Teams, ...)** to send to a colleague, for example.

When the recipient clicks this link, he or she is first asked to sign in (if it was not already the case for that user). After logging in, the user is presented with the detail page of the object in question. In the case of a collection, the user arrives at the collection's content page. Note: If the receiving user does not have read rights to the object in question, an information message is displayed to indicate that there are incomplete rights to consult the object.

When you perform this action **in bulk (after selecting several objects)** the system will create a selection in the background. So the recipient of the link will not arrive at a detail page, but at the selection page where he/she will see all the shared objects for which he/she has read rights. Again, login is required before you can access the shared selection.

9.2   Download on my own device

Downloading an object causes you to take a local copy of the object and **make** it **available on the device you are logged in with**. In this case, the object still remains stored in MediaHaven. This action can only be performed on objects that are in the published objects phase.

9.2.1   Downloading the sample file

To download the sample file or the low resolution you do not need specific rights. As soon as an object is displayed online on a website, you can obtain the low resolution file in several ways. That is why we do not protect the functionality 'Download example file'.

- Go to the published object (item or collection).
- Choose the action 'Download sample file'.

If you perform the action on one item, the download is performed immediately and the item is available for download in your browser.

If you perform the action on a collection, then the download is not performed immediately, but you have the option to choose from the sample or original files of the collection and can perform another transformation on the objects in the collection.

Downloading sample files can also be done in bulk. To do this, select the published objects you wish to download and use the bulk action 'Download'. Then choose to start from the sample files and perform another transformation on the items if necessary. This will cause you to download a zip file containing the relevant objects.
        Caution: the bulk action may be hidden under the "..." (more actions).

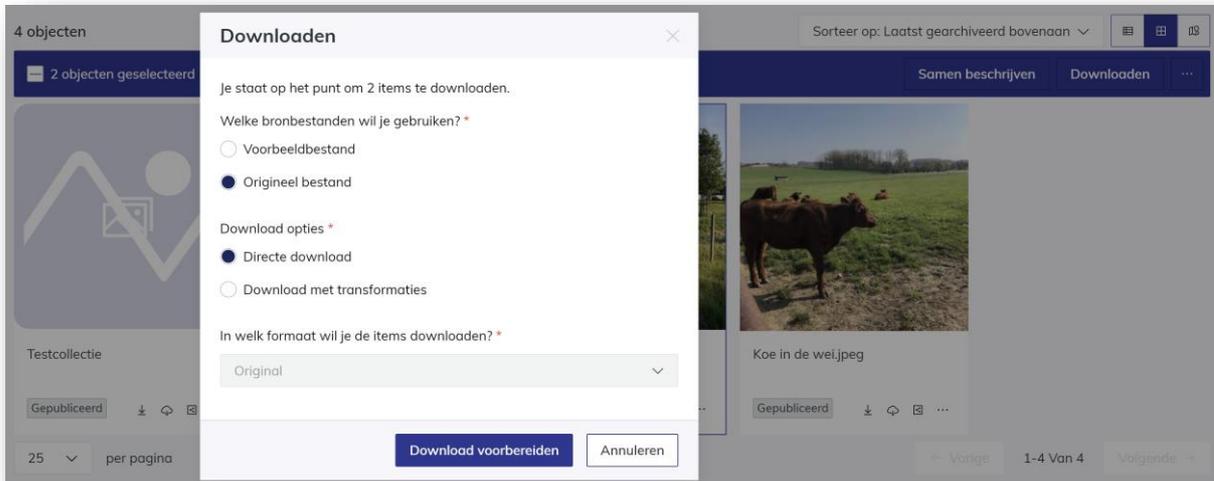### 9.2.2   Downloading the original file

In order to download the original file of an object, your user must be in a user group that has export rights to that object.

- Go to the desired published object (item or collection).
- Choose the action "Download original file" (or bulk action "Download").

The system will open a pop-up screen where you can choose whether to perform a direct download on your own device or a download with transformations. These predefined

transformations (or export locations) determine in which file extension or format you want to download the items.

- Choose the desired download option and any necessary transformation.
- Click on the "Prepare Download" action.

If you have chosen a direct download, the original file will appear as a download in your browser after some time.

If you have chosen a download with transformations, the download and transformation will be prepared by the system. Once this preparation is completed, you can **download** the item or a zip file with items for which you have download rights in case of a collection from the download list (in the "selection" section of the navigation bar) **onto your own device** via the "Download" action.
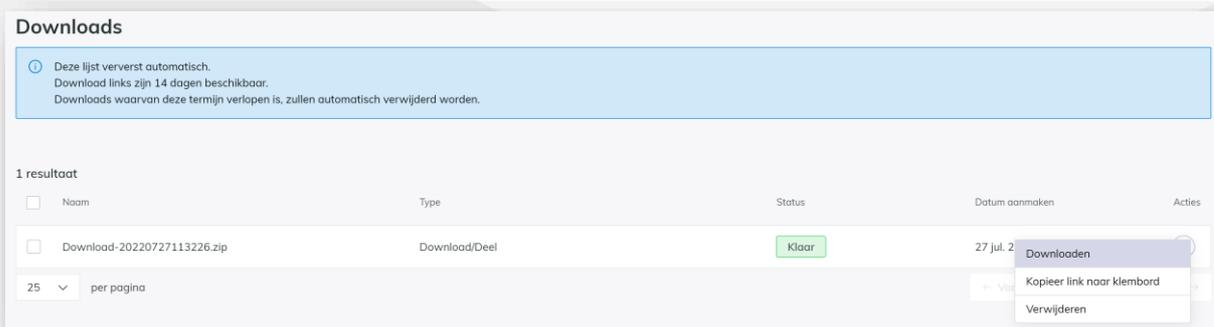

9.3 Sharing with externals via a temporary download link

Downloading an object causes you to take a local copy of the object and potentially **make** it available **to another person (outside the system) via a temporary download link**. In this case,

the object still remains stored in MediaHaven. This action can only be performed on objects that are in the published object phase.

- Start from the original download of one object or choose the bulk action "Download".
- Choose a download of transformations and select the desired transformation.
- Click on the "Prepare Download" action.

The download and transformation is prepared by the system. Once that preparation is completed, you can **copy** the item or a zip file with items for which you have download rights in the download list in case of a collection **a download link to your clipboard** via the action "Copy link to clipboard". You can now paste this link into any other program (e.g. Outlook, Teams, ...) in order to, for example, send it to an external partner or person with whom you want to share the item(s).
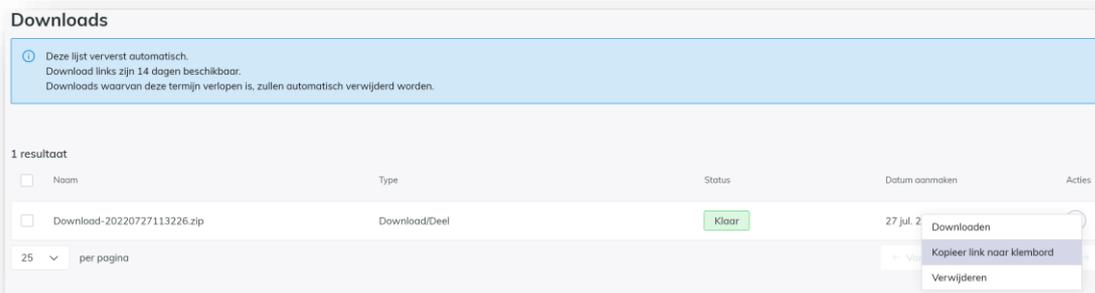
9.4 Unlocking a subset of items to externals

If you are using the public portal and you would like to make a certain subset of the public items available to external parties in a simple and quick way, you can use the public partial link of a saved search.

- Create a saved search that meets the subset of items you wish to access.
- Go to the list of saved searches and choose the "Copy Public Link" action.
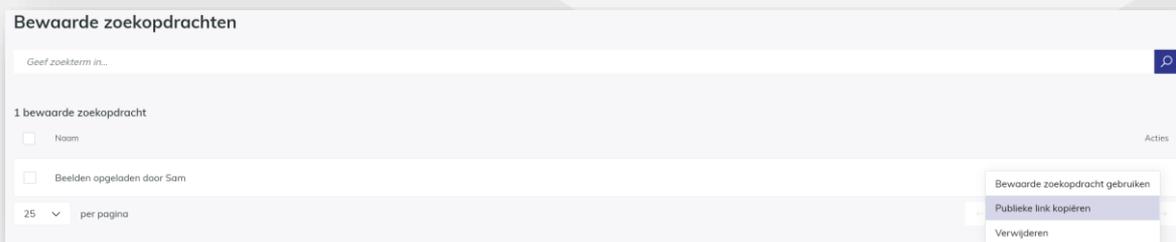
Place the link on your own website, send the link in a newsletter or distribute it to the public in some other way. When someone opens the link, the public portal is displayed showing only the public objects that match the saved search.

9.5   Sharing on social media

When you want to share an object on a certain social media channel, you can use the action "Share". The pop-up screen displays a section with different social media channels if it is a published object for which the group "Public" has reading rights.
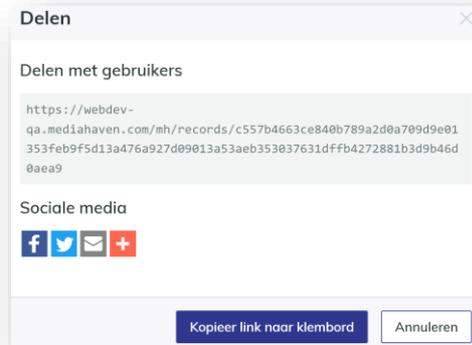

Please note that there is no effective upload on the social media channel. However, you can use the plugin in MediaHaven to easily format your message/post containing a link to the object on your organization's public portal.

9.6   Embedding an object on another website

When you want to embed an object on another website (without having to upload the object on that website) you can use an embed code. This embed code is created by the MediaHaven system for all published objects for which the user group 'Public' has read access.

- Go to the published object and choose the 'Retrieve Embed Code' action.
- Fill in the necessary information:
    o A width & height can always be chosen here.
    o For collections & videos, you can also choose to have them play automatically.
- Click on the 'Copy to clipboard' action.
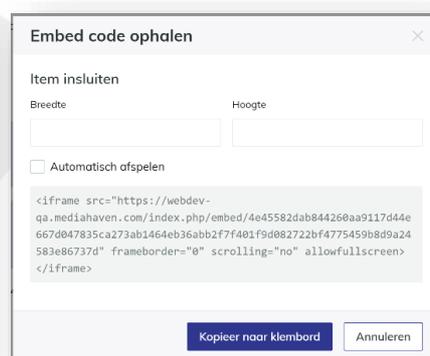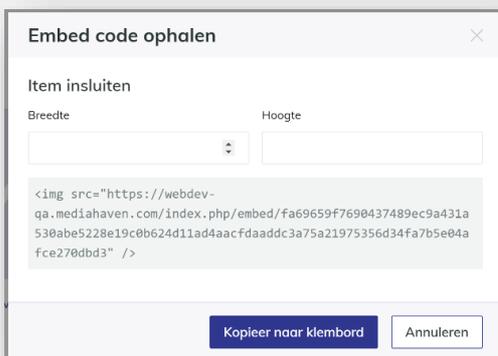
The link is copied to the user's clipboard and the pop-up window closes. **You can now paste this link into the back-end of a website** to display the object on that website.

9.7   Exporting an object

When you want to export objects to another application or storage location you can use the 'Export to location' action. This action is linked to specific export locations that are predefined for the organization and you also need download rights on the object in question. In this case, the object also remains stored in MediaHaven. This action can only be performed on objects that are in the published objects phase. Note: if no specific export locations have been defined for your organization, you will not see the 'Export to location' action!

-    Go to the published object and choose the 'Export to location' action.
-    The system will open a pop-up screen where you can choose which predefined export location you want to export the object to. In this drop-down list only the specific (not downloadable) export locations are shown. This means that you can only choose the export locations here that are specifically designated to export to an external location.
-   Choose the desired export location and click on the 'Prepare Download' action.

The system will prepare the export. In other words, the system will export the object (item or items within a collection) to the desired location. You can further follow up on this preparation in the activity list (section "Selection" in the navigation bar). However, unlike when downloading, when exporting you can no longer perform actions in the activity list.

Exporting to a location can also be done in bulk. To do this, select the published objects you wish to export and use the bulk action 'Export to location'. This will ensure that all selected objects are exported to the external location. Note: the bulk action may be hidden under the "..." (more actions).

9.8   Download, share or export from different searches (the selection)

If you wish to download, share or export multiple objects from the same search you can use the bulk actions. However, if you want to do this for objects from different searches you can create a "selection". This personal selection can then easily be downloaded, shared or exported in its entirety. Please note that a selection is not stored as a separate object in the system.

You can add any published object (item or collection) to which you have download rights to your selection. You can do this individually per item or in bulk. When adding a collection, all underlying items of that collection for which you have download rights are added to the selection.
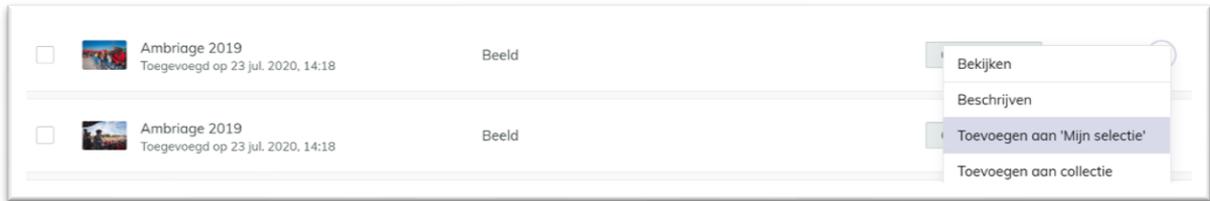
After adding the objects you will get a message in the top right corner of your screen to consult the selection. You can also navigate to the selection via the item 'selection' in the navigation bar. Within the selection you can search and filter for objects, but most importantly you can download the entire selection (sample and original files), share and/or export it. These actions are similar to downloading, sharing or exporting outside the selection.
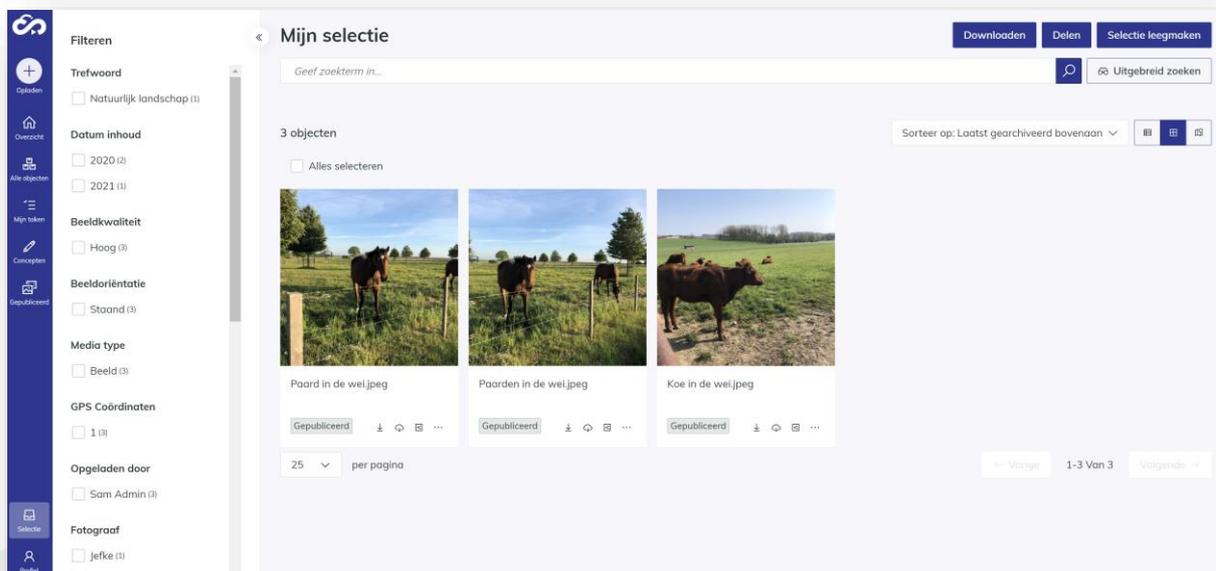
Via the actions on an object (both on the published objects page and on the "My Selection" page) you can also remove it from the selection. This can also be done individually or in bulk.

10 Remove

Items and collections that are still in draft or that have already been published can be deleted at any time. This means that they can no longer be consulted in the application. **This action can only be executed if the user has delete rights**. If he has no delete rights, the action 'Delete' will not be shown.

You can delete one item or collection individually, but the bulk action 'Delete' is also available. When the user clicks the 'Delete' action, a confirmation question is always displayed before the item is effectively deleted. Deleted items cannot be retrieved by the user or administrator.

Note: When deleting a collection, you only delete the collection and not the underlying items of that collection.

11 Establishing relationships between objects

When an item or collection can be related to another item or collection, a relationship can be created between the two objects. The relationship always has one of the following default types: contained, associated or contains. If another relationship type is desired within the customer's organization, it can be configured.

Creating a relationship can only be done between objects of the same record type. This means that you can only create relationships between items or between collections. In addition, it is also not possible to create a relationship with the object itself.

11.1 Create a relationship

Creating a relationship can be done through the detail page of an item or collection.
- Go to the detail page of an item or collection (in draft or published).
- Go to the "Relationships" tab.
- Choose the action 'Create a relationship'.
- The system opens a pop-up screen where you can select the relationship type. These are predefined relationship types.
- Also choose the object to which you want to link the selected object. You can use an autocomplete to search by title of the object in question.
    o For an item, you will see in the dropdown list only items for which you have edit rights. These are both published items and items in draft.
    o For a collection, you will see in the dropdown list only collections for which you have edit rights. These are both published collections and collections in draft.
- Then click on "Save.

The created relationships are displayed by relationship type on the 'Relationships' tab.

11.2 Delete relationship

After creating a relation you can easily remove it again via the actions on the relation concerned in the 'Relations' tab of the detail page of the object. You will first get a confirmation question before the relation will be removed.

12 Media Player

The media player can be used to create fragments to accompany an audio or video file. The fragments can then be metadata'd separately in MediaHaven so that they contain the correct and specific metadata about the content of that piece of video or audio. Even when searching, only the corresponding fragments are then displayed as search results. In this way, a user does not have to watch/listen to the entire video or audio in order to arrive at the relevant topic.

The extended media player can be opened through the actions of a published audio or video file. The system will open for you an additional tab in the browser showing the media player. Go through the login procedure if prompted.

12.1 Media player interface

The interface of the media player looks slightly different than the interface of your MediaHaven environment. Therefore, we'd like to briefly explain the main components.
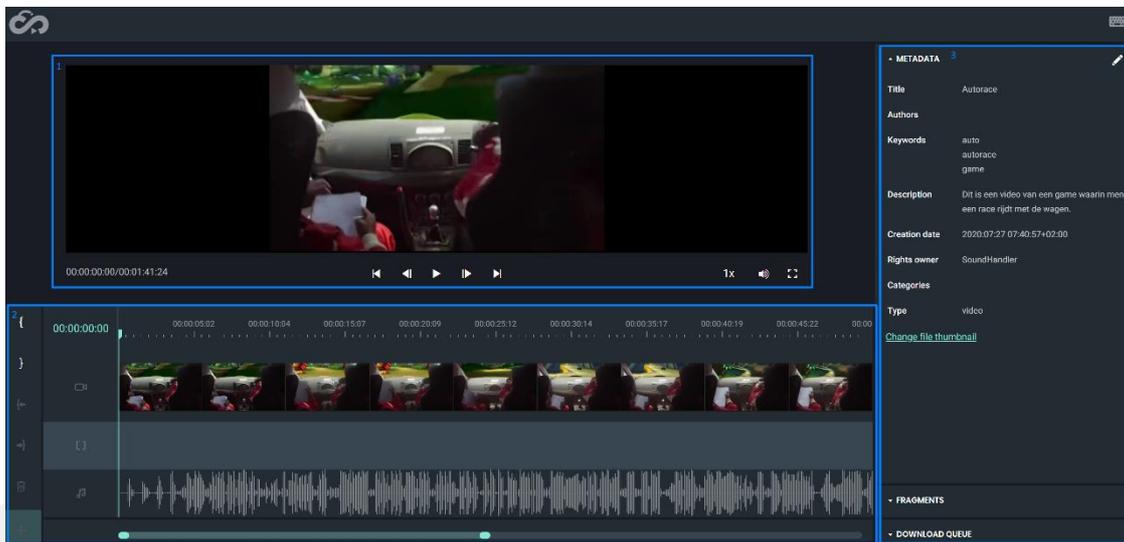
1. Playback of the video or audio file. Following play settings are possible (shown from left to right):
    a. Indicate a specific time
    b. Navigate to top
    c. Navigate to previous frame
    d. Play/Pause
    e. Navigate to next frame
    f. Navigate to the end
    g. Changing the speed of playback
    h. Changing the volume
    i. View fullscreen
2. Display of keyframes and fragments if created. The bar at the very bottom allows you to zoom in and out to see the full timeline.

3. Three tabs (Metadata, fragments, download queue) where metadata can be changed, where the created fragments are shown or where you can follow the downloading of fragments. Each tab can be opened separately by clicking on it.

12.2 Change metadata and preview via the media player

Through the media player it is possible to change a certain set of standard metadata fields.

- Open the Metadata tab on the right side of the media player.
- Click the pencil icon at the top to change the displayed metadata fields.
  - o Attention: you need to have editing rights on the object for this. If you do not have these rights, the pencil icon will not be shown.
- Change the desired metadata and click the pencil icon again to save changes.

In addition, it is also possible to change the preview of the video. This preview is the image used to display the video in the list or grid view of MediaHaven2.0. By default, the preview is determined by the system during the processing of the video file, but can thus be modified by a user via the media player.

- Using the timeline, go to the desired time in the video whose frame you want to use as a preview.
- Open the 'Metadata' tab on the right side of the media player and click 'Change file thumbnail'.
- The system opens a pop-up screen where you see the current and the new preview.
- Click 'Ok' to confirm the new preview.
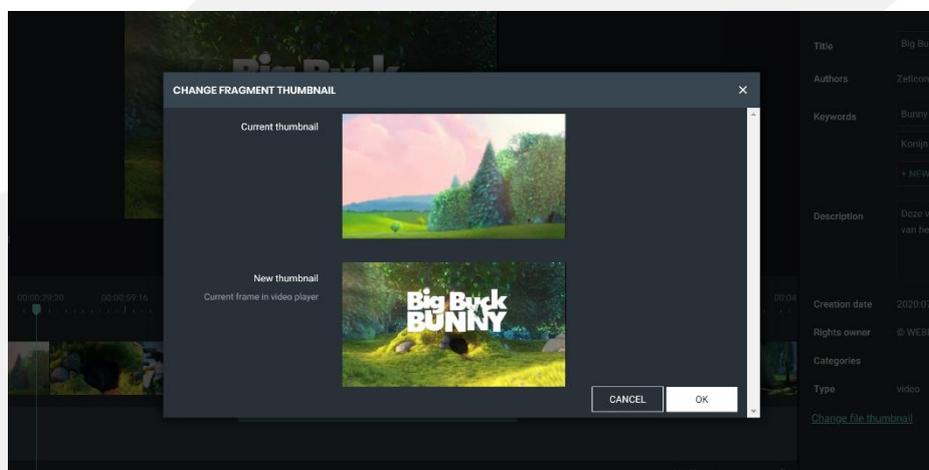
The preview of the video has now changed to the new frame. It will now be shown in the list and grid view of MediaHaven 2.0.

12.3 Create and manage fragments

Excerpts are smaller parts of a video or audio file and are stored within MediaHaven as a separate object. This allows you to metadata and export them separately. The link between the fragment and the original video is always preserved and can be accessed in the 'Hierarchy' tab. *For example, a room show contains several subjects. For each topic a fragment can be created which allows you to assign specific metadata to this part of the total video.*

Creating a fragment is only allowed when you have edit rights on the entire video or audio and can be performed from the media player.

- Select the starting point of your clip on the timeline, from the frame view, or from the sound bar.
- Press the "[" button on the left side of the media player.
- Select the end point of your clip on the timeline, via the frame view, or via the sound bar.
- Press the "]" button on the left side of the media player.
- The system will display your selected piece between two white lines. To effectively create the snippet, click on the green + button on the left side of the media player.

The system will now display the fragment with a yellow frame. In addition, the fragment is now visible in the "Fragments" tab on the right side of the media player. You can still change the fragment by moving the yellow frame, making it wider or narrower.

To **effectively save the fragment in MediaHaven** as an object so you can describe it separately, you can click on the cloud icon in the 'Fragments' tab on the right side of the media player. If you have created multiple fragments, you can save them together using the "save" button at the top of the 'Fragments' tab.
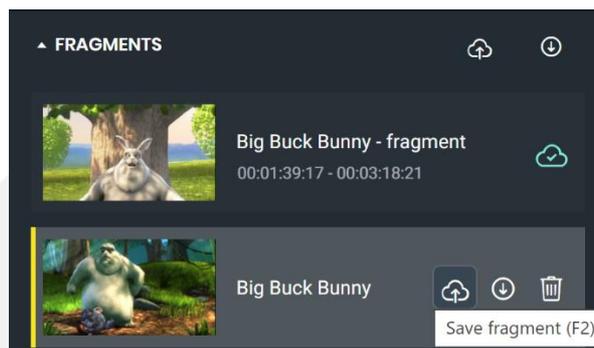
The created fragments are now visible as a separate object in MediaHaven. **Via the 'Hierarchy' tab** in the detail page of the original video you can always see the link to the fragments you've created. And also vice versa, from the fragment you can see the link to the full video or audio.
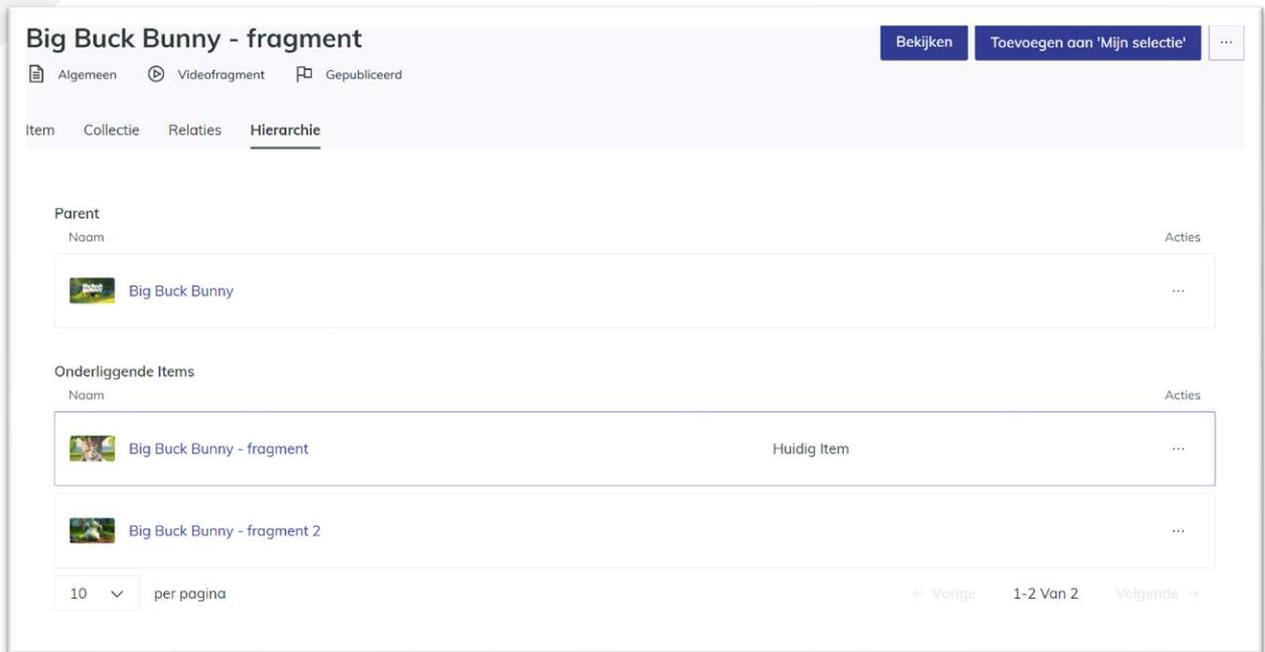
The thumbnail of a clip can also **be changed** via the media player.
- To do this, select the time of the frame in the clip you want to use as a thumbnail.
- Then click on the thumbnail of the fragment in the Fragments tab.
- The system will open a pop-up screen where you will see the current and new thumbnail.
- Click 'Ok' to confirm the new thumbnail.

In addition, it is also possible to **delete fragments again**. The deletion of fragments can be performed both via the media player and via MediaHaven.
- From MediaHaven, you can use the 'Delete' action on the object in question.
- From the media player, you can delete a fragment in the 'Fragments' tab using the trash icon.

12.4 Download or export excerpts

If you only want to download or export a certain part of an audio or video file, you can also use the fragments. From the media player and from MediaHaven, you can download/export a fragment individually. Downloading/exporting from MediaHaven was discussed earlier in this guide. Downloading/exporting from the media player is explained in more detail below.

Downloading from the media player
- Go to the "Fragments" tab on the right side of the media player.
- Click on the download icon for one excerpt or use the download icon at the top of the tab to add all excerpts to the download list.
- The system will now display the fragment in the Download queue tab.
- Open the 'Download queue' tab and click on the 'Download' button to start the effective download.
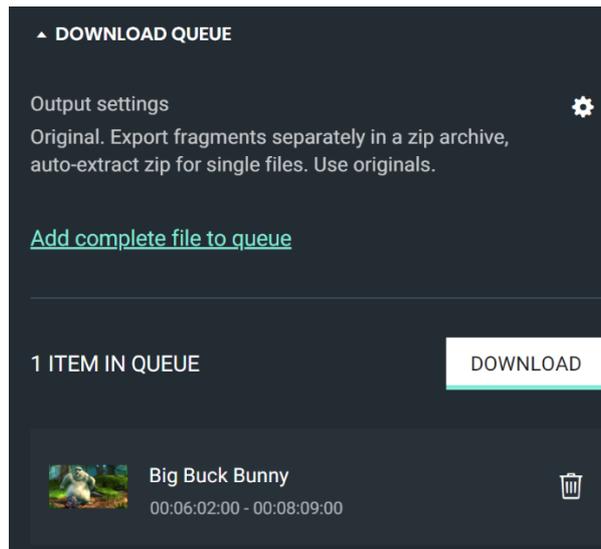
You can also add the complete audio or video file to the download list via the "Add complete file to queue" link. In addition, it is also possible to change the order of fragments in the download list. This can be done by moving the track to the desired position in the download list.

Exporting from the media player
To export one or more clips to a desired export location, you can follow the same steps as downloading a clip from the media player. However, before you click the 'Download' button, you can change the export settings using the cog icon.

The system will open a pop-up screen where you can change certain settings for exporting. For example: Exporting fragments as separate files in a zip file, exporting fragments as one video, ...