

## Introduction to Assets

The Assets module is used to make file based assets such as word documents, excel spreadsheets, Adobe pdf documents, jpg and gif images, or any other type of document available on the ESM, easy to manage.

Once a document has been uploaded to the Assets module, it will be available to the embeddable assets module. (find more information on embedding modules [here](#))

The embeddable assets module has two modes - both of which show assets first with an icon as to what type of file it is, followed by a link to download the asset, finished by the size of the asset.

The first mode displays a list of user selected assets. The second mode is used to embed a list of all of the assets in an Asset Group. Use this mode to make available a list of related documents.

**Important Note:** Assets uploaded with either the .jpg or .gif extension will be available in html wysiwyg editors in the image editor in the image list. i.e. If you want to make an image available for use on the website, upload it to the assets and find it in the image list of the images editor.

**Important Note:** Assets with the extension .doc(x) or .xls(x) or .pdf will be incorporated into the site search.

**VERY IMPORTANT NOTE :** Do not upload sensitive documents such as those containing social security numbers, credit cards, company secrets, etc.

## Add an Asset

To add an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Click on the *Add Asset* link just below the main navigation.
3. Fill in the Assets fields. For more information, see the [Asset Field List](#) section of this document.
4. Click *Save* to commit your new asset.

The asset will now be visible when the Asset Group is opened in the left navigation of this module. It will also be available in pages to be embedded (more info on embedding modules [here](#) and in the image manager of the HTML editor.

## Edit an Asset

To edit an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the asset that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the Assets fields. For more information, see the [Asset Field List](#) section of this document.
4. Click *Save* to commit your changes.

The edit screen also has a *download* and *history* accordion. Use these to either download the asset for personal review or to see the assets individual history.

## Delete an Asset

To delete an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the asset that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the asset.

**Note :** Assets that are currently individually embedded in pages cannot be deleted. Attempts to do so will result in an error message describing the page that contains the asset. If you are certain that you wish to remove the asset, do so on the page in the warning

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message and then follow these steps again.

## Assets Field List

**Asset Name :** The asset name is the handle that you will use to identify the asset. Name it appropriately such that it can be easily identified. This name will appear while embedding assets in pages (more info [here](#)), and in the html page image editor. This field is used as the title of the document in the search results.

**Asset Group:** The asset group is the list to which the asset belongs to. Select the asset group that is relevant for your asset. To add a new asset group, see the instructions [here](#).

**Show Date and Hide Date :** Use these date fields to control the assets visibility by time. For instance, you could set an asset to appear on the site only after or before a certain date depending on business needs.

**Search Results List Description :** This snippet of text will appear in the search results list. When an asset is found by the search, it will display it to the user in a list format. The description will be shown below the title in this list. Keep this field short - 2 or 3 sentences. Make certain that someone who is searching will know if this is the right document.

**File :** This is the actual asset. Find the file on your computer or network by clicking on the [browse](#) button to open a local file browser. Allowed file types include .doc, .xls, .pdf, .jpg, .gif, and .png.

**Note :** This field only controls visibility in terms of links from the site and search. The asset will still be downloadable by direct http request.

## Introduction to Asset Groups

Asset Groups are a means to categorize assets. In the assets area, the groups appear as the categories that assets are stored under in the navigation.

Assets groups are also a part of security.

### Add an Asset Group

To add an asset group, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Click on the *Add Asset Group* link just below the main navigation.
3. Fill in the fields. Each group must have a unique name. Add a short description that will serve as a reminder.
4. Click *Save* to commit your new Asset Group.

The new Asset Group will now be visible when creating assets and in the *Content Groups* edit view in the *Asset Groups* accordion.

### Edit an Asset Group

To edit an asset group, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the Asset Group that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the Assets Group fields. Each group must have a unique name. Add a short description that will serve as a reminder.
4. Click *Save* to commit your changes.

### Delete an Asset Group

To delete an asset group, follow these steps:

1. Click on the *Assets Group* tab in the main navigation.
2. Find the Asset Group that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the Asset Group.

**Note :** Asset Groups that have assets assigned in the Assets area may not be deleted. Attempts to do so will result in an error message. If you are certain that you wish to remove the Asset Group, please reassign the assets to other groups and then try again.

## Bulk Upload

Bulk upload is used to upload multiple assets at once as a means of saving time. The bulk upload accepts a zip file whose specially formatted folder structure gets parsed by the system and rendered into assets.

The system will attempt to match asset groups found in the zip with existing asset groups by name. When a match is found, assets will be loaded to the matched group. If it does not find any matches, the system creates a new asset group.

The system will also try to match assets by name as well when nested in found asset groups. If an asset is matched it will update the asset file.

### To create an uploadable zip file, follow these steps.

1. Create an empty working folder whose contents you will use for this purpose.
2. In that folder, create subfolders representing the asset groups that you want to upload. The name of the asset group will be either the text contents of a file named "assetgroupname.txt" directly in that folder or if that is not found, the name of the folder with underscores converted to spaces. The assetgroupname.txt file is optional - use it if you want the asset group name to have more complex characters than is supported by file system folder names i.e. slashes .etc.
3. In those subfolders that represent asset groups, add files that you want available as assets. The name and description of the file will be taken from the file name with underscores converted to spaces. The eventual asset file name will have spaces converted to underscores for safe web use. Each file in that folder will then become an asset in that asset group.
4. When you have created the folders that you want to upload, highlight them all and zip them up with your favorite zip program. Typically, you should be able to highlight them in window explorer >> right click the highlighted >> Add to archive >> check zip radiobox >> OK. The zip file when explored should have directly at its root the folders representing assets. Once the zip file is created, confirm by exploring it and seeing the folders representing asset groups at the root.

### The format of the zip file is as follows:

- zipfile
  - (folder at zip root) name of asset group
    - (optional file) assetgroupname.txt
    - (file) asset to be associated with asset group
    - (file) another asset to be associated with asset group
    - (more files)
  - (folder at zip root) name of another asset group
    - (optional file) assetgroupname.txt
    - (file) asset to be associated with another asset group
    - (file) another asset to be associated with another asset group
    - (more files)
  - more asset groups etc.

### To bulk upload a zip file:

1. Click on the bulk upload link in the assets area. (you'll need the right permissions)
2. Click the "Browse" button and find the zip file on your system.
3. Click the "Upload button".
4. The system will then validate the zip file, load the files, give feedback in the usual feedback spot, and then refresh the left navigation. If validation fails, the system will try to give feedback on what is wrong with it.