Test Database

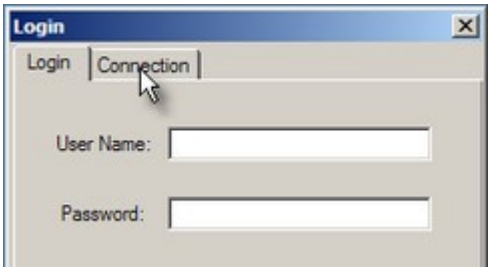
If you would like to work in a test database, detach the AceAssets.mdf and AceAssets.ldf files from the server. Copy, rename and reattach. You can easily switch between databases in AceAssets. Go to **Admininistation | Change Database**. After prompting, AceAssets will close. When you restart the program, you will get a login screen allowing you to choose any database.

Chapter 1 — General Setup

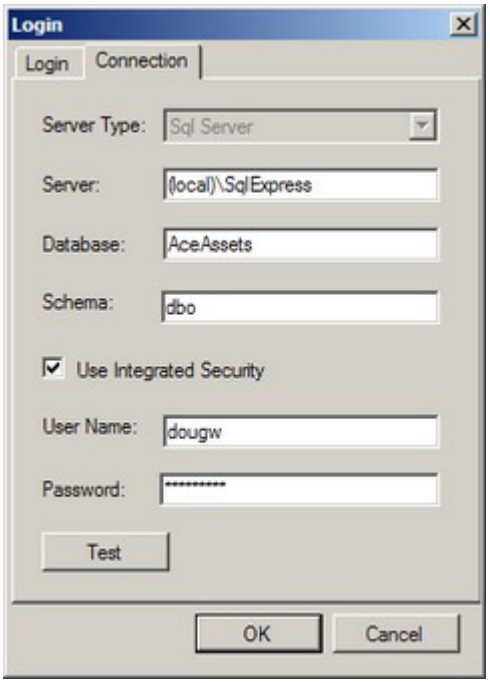
The first step before creating an Asset collection or "Catalog" is to login to the database and set up your users.

1. Login to the Database

When you first start AceAssets (from the Start Menu), you will see a Login screen like this:



Press the Connection Tab and, depending on how Security is set up on your SQL Server, use "Integrated Security" or SQL Server Security. In the example below, we are accessing a local SQL Express with Integrated security:

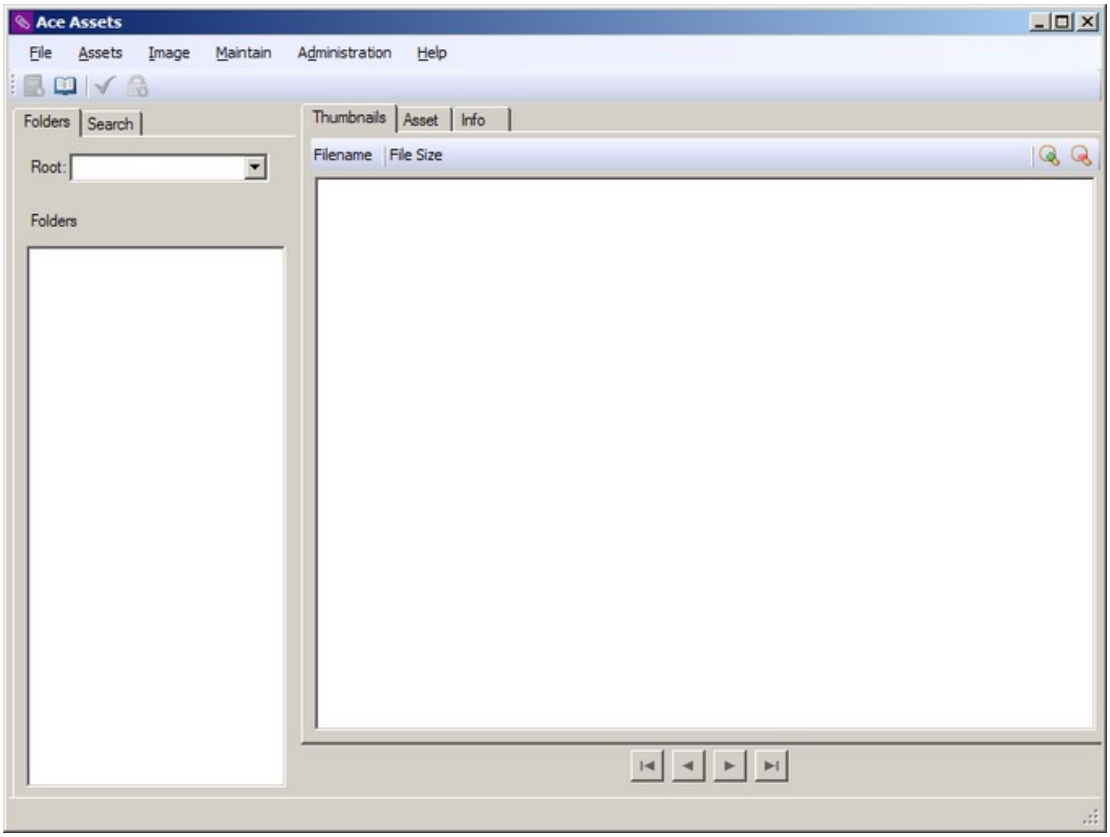


2. Add an "Administrator" User

Each AceAsset database must have at least one "Administrator." To ensure this requirement, the Add Administrator dialog will be displayed the first time you login to a database. You can add additional divisions, users, groups and permissions later if desired. Fill in the fields and press **OK**. **Note**: If you are not using "integrated security", you will need to get your database user id from your database admin.

3. Main AceAssets Screen

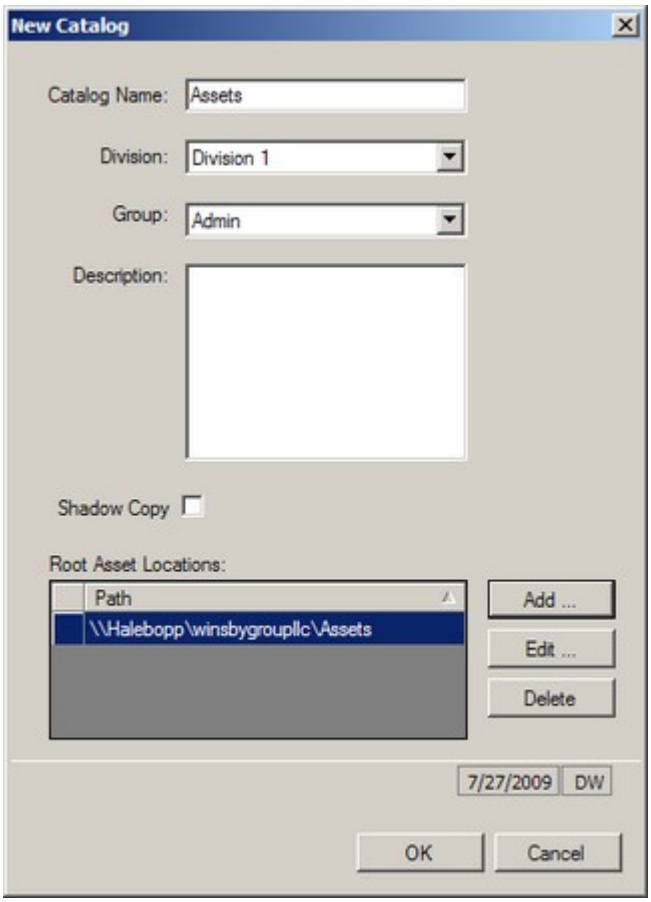
You should now be presented with the main AceAssets screen. **Note:** If the Maintain menu does not have any enabled items, exit the program and run it again.

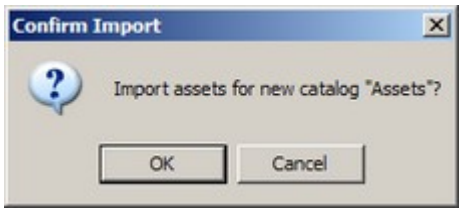


4. Create an Asset "Catalog" (File | New Catalog...)

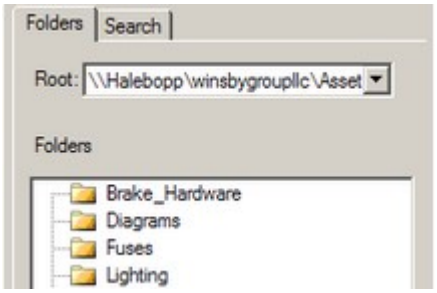
All "assets" are organized by "catalogs", so the first step is to create a new catalog to accept your asset file information. You can use just one catalog for all your assets, but you might have more flexibility if you segment them logically by division or by your main product lines. The "Root Asset Locations" are one or more network paths where the assets are stored. These "Root" Paths become separate access points in the catalog.

Generally, it is a good practice to select UNC paths from "My Network Places". Otherwise you could use permanent mapped drive letters. **Important Note: Due to a design limitation, you must not select the lowest directory in the tree. Be sure you select at least one up from the bottom.** This is because each lowest directory name becomes a "Folder" in the tool. Press **OK**.





You will then be asked to "Import assets for new catalog ...". Press **OK**. The loading progress will be displayed in the status bar and the total assets found will be shown at the end of the process. The result will create folders such as shown here:



Selecting a "Folder" will display thumbnail images (if possible) in the viewport on the right. There are three "tabs" in this viewport: "Thumbnails", "Asset" and "Info".

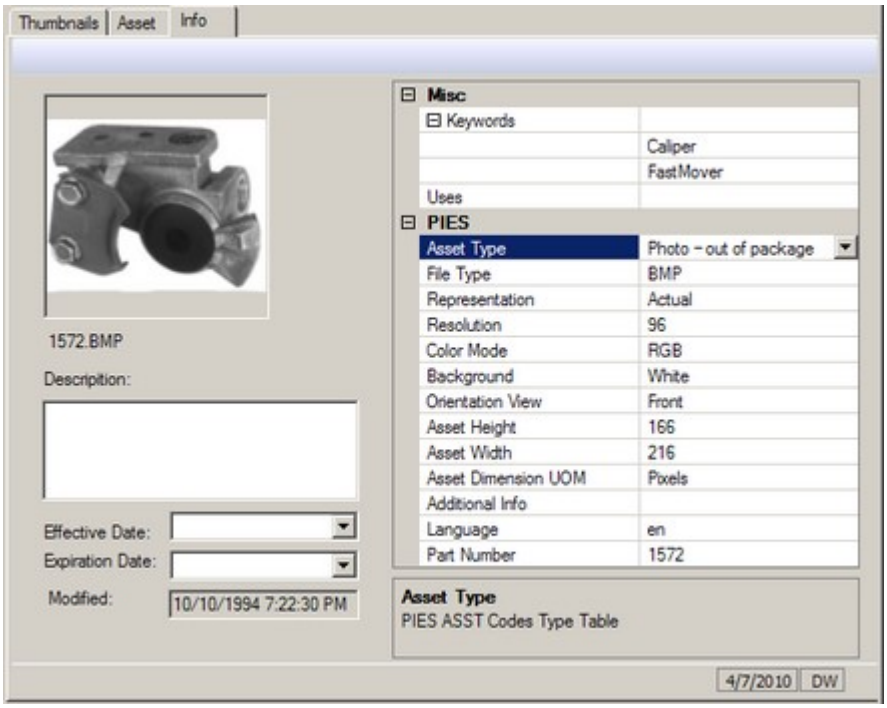
The "Thumbnails" view displays each asset, if possible, as a small picture. Selecting one and going to the Asset tab will show a larger image of the asset.

The "Info" tab shows detailed information about the selected asset including "properties."

5. Asset Properties

Properties (sometimes called “metadata” in other contexts) are used by the system to keep track of information about each asset. Each property has a “Property Type” which is used to define its use, data type and optionally its valid values.

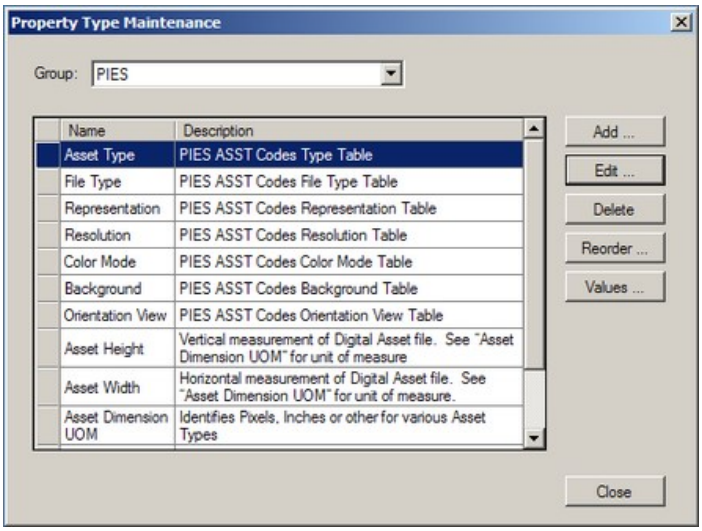
These properties are grouped together by “Property Groups”. Property values for an asset are maintained on the "Info" tab (see screenshot below):



This screen shows two "Property Groups" currently defined: "Misc" and "PIES". The PIES property group is pre-set by the system and should not be changed.

6. Setting up Property Types

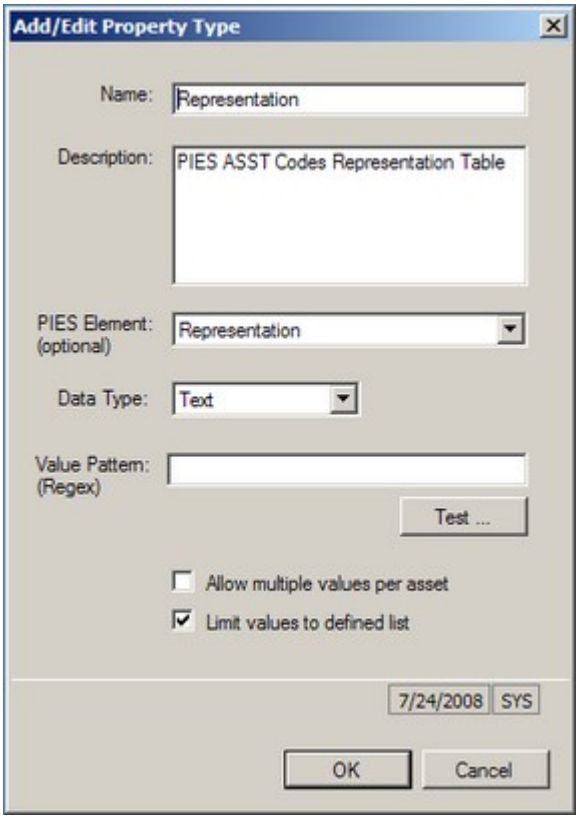
While some property types already exist in the system (e.g. the PIES property group), you might also want to create your own. This can be done with the **Maintain > Property Types** menu.



The screen is first displayed without a "Group" selected. Use the drop-down to select an existing group to work with. If you want to work with a new group, you must first create it using the **Maintain > Property Type Groups** menu.

The "Add" and "Edit" buttons let you maintain new and existing Properties within the group. The "Delete" button will remove the selected property. The "Reorder" button allows you to change the display order of the properties within the group. Finally, the "Values" button shows the current values used by the property and gives you the ability to edit those values and associated codes. If a property uses the “Limit values to defined list” option, you must supply the valid values on the Property Values screen.

Here is the screen used to maintain the property type:



You must supply a "Name" and "Data Type". The "PIES Element" is used to tie the property back to the AAIA PIES standard. The "Value Pattern" (and Test button) is an advanced feature that allows you to set up edit checks on entered property values.

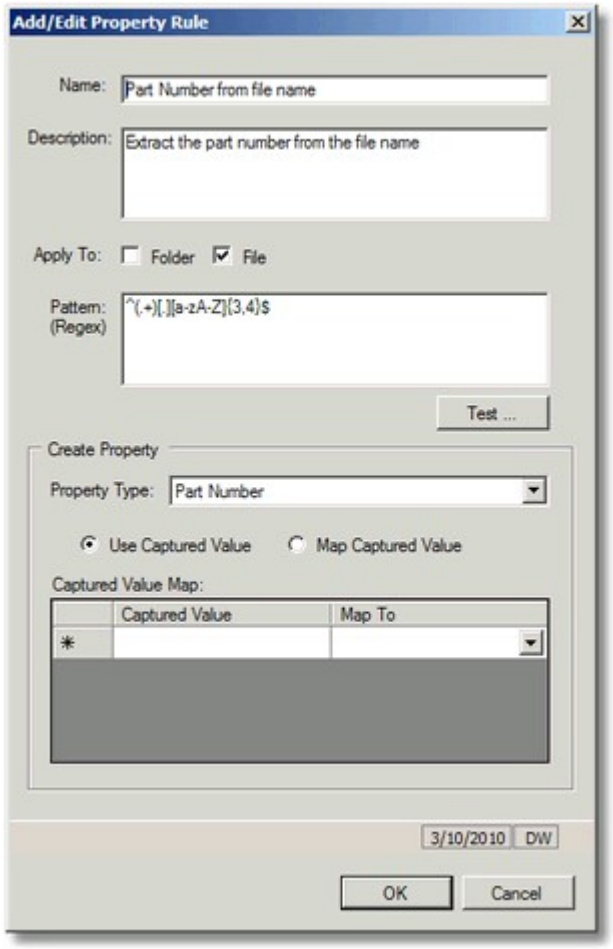
The "Allow multiple values per asset" check box determines if you can have more than one value for a property. This might be used, for example, with a "keyword" property type.

The "Limit values to defined list" check box determines if the user can add their own free-form values or must select them from a pre-populated list.

7. Assigning Property Values

There are four ways to assign property values to assets. (1) Directly on a single asset using the Info tab (as shown in section 5 above), (2) Using the **Assets > Assign Property…** function to assign an existing property value to all currently “selected” assets on the Thumbnails tab. (See how to select assets below), (3) Setting up and applying Property Rules to selected (or all) assets, and (4) Importing them from a “loadsheet”.

For this tutorial, we will assign a property using a Property Rule. Use the **Maintain > Property Assignment Rules…** function and press the “Add” button on the Property Rule Maintenance screen to add a new rule. The following dialog will be displayed. Fill it in as below:



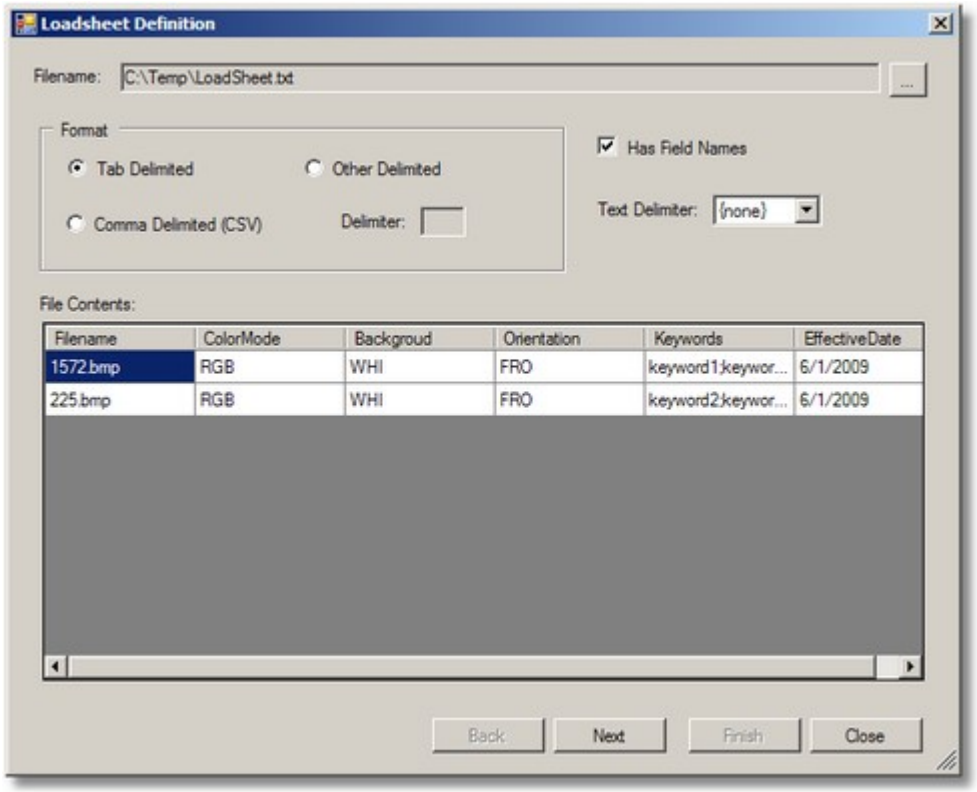
The Regex pattern is shown below (to make it easy to copy/paste). The parenthetical portion defines what is "captured" (in this case, everything before the three or four character file extension). You can test the regex pattern by pressing the Test… button and typing a filename in the “Text to search” box and pressing Search:

```
^(?<value>.+)[.][a-zA-Z]{3,4}$
```

Then you can use the **Assets > Apply Property Rules...** function to assign the Part Number property, extracted from the filename, for all (or selected) assets in your catalog.

It is often helpful to batch load properties from a file (or “loadsheet”). This file can be created in Excel and saved as a CSV or tab-delimited file. It must contain at a column for “Filename” (or Filename and Path if Filename is not unique) and at least one other property. For multi-valued properties, separate the values with a semicolon.

Use the **Assets > Apply Loadsheet Properties…** function to assign properties in batch. The following screen shows the import wizard used for this purpose.

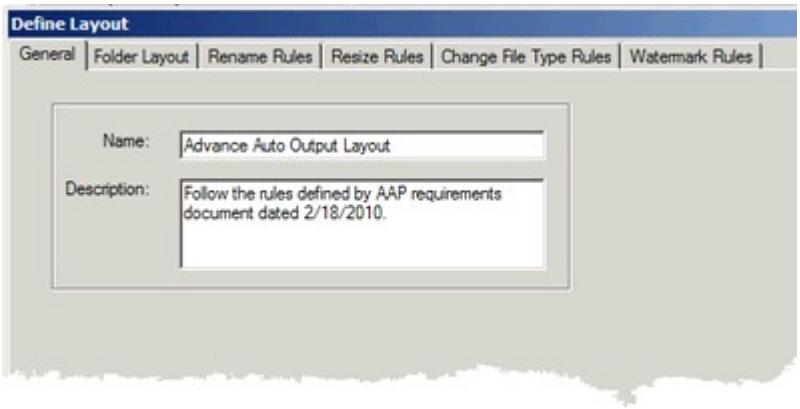


The next screen lets you match up the fields in the loadsheet with property names (and save them for future use).

8. Maintain Folder Layouts

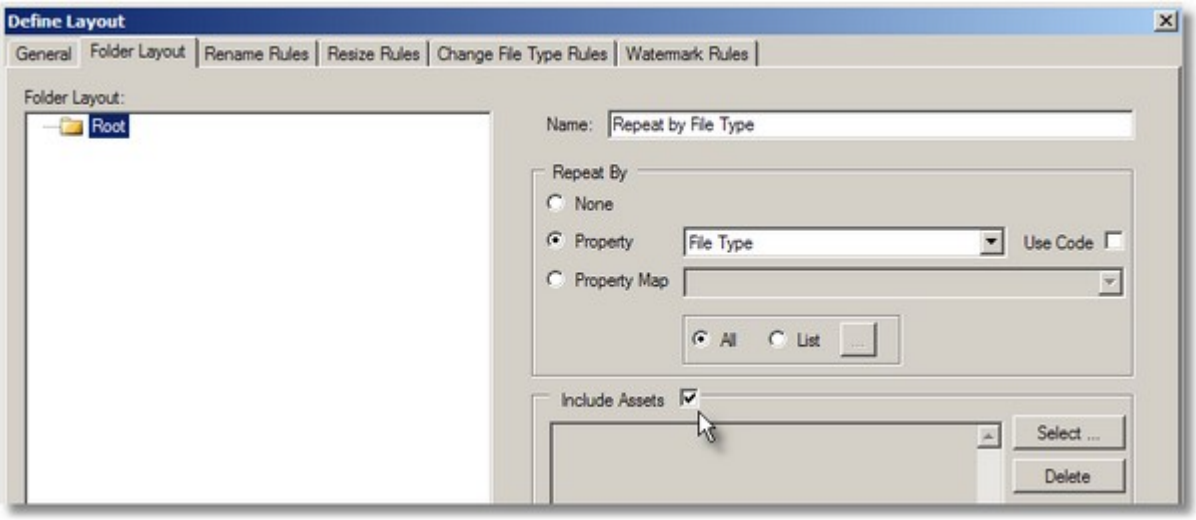
Before you can export (or "publish") your assets, you need to set up some instructions so AceAssets knows what to do. These output instructions are defined with the **Maintain > Folder Layouts…** function. From the Layout Maintenance screen, press the Add button to create a new layout.

Each layout has several "Tabs" of options for output. The Layout Name and Description is maintained on the General tab and should be completed before moving to the other output options.



"Folder Layout" is used to create a directory structure for your assets and select which assets to output. You could, for example, create a folder for each asset type if you wanted. To export **all assets** (from the selected catalogs) into the root of the target folder, select the "Root" level and check the "Include Assets" option. (For

more advanced output structures, right-click in the Folder Tree to add or remove sub-folders.) The example below will create a folder for each “File Type” (TIFF, PDF, etc.). Notice the “Include Assets” option is selected even though we have not put any additional filers with the “Select” button. The “List” button also allows you to limit the File Types (in this case) to include.



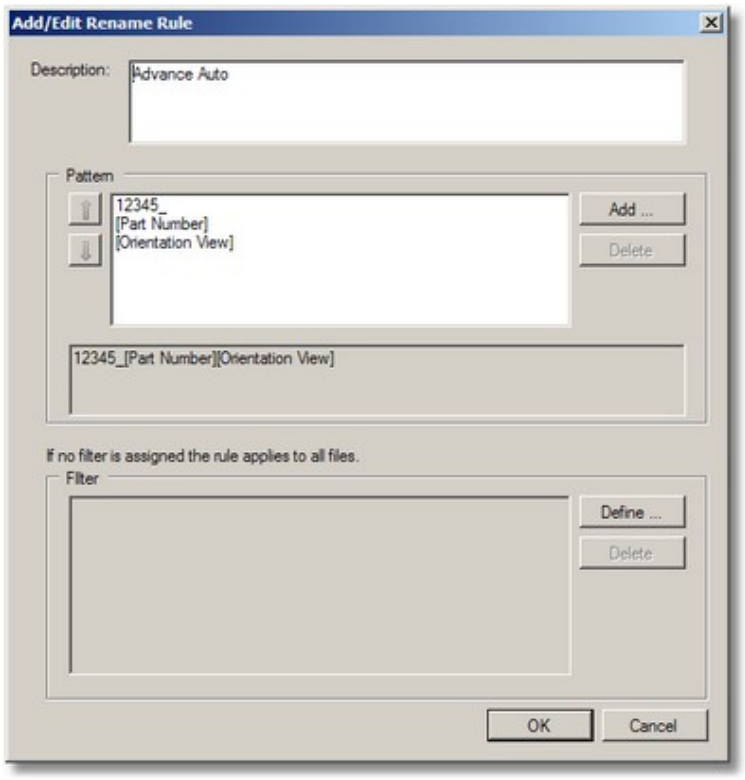
“Rename Rules” are used to change the file name according to set instructions. This tab allows multiple rules to be defined, each with there own “Filter” to determine which rule to apply. If no filter is defined, the first rule is used. (See below for an example).

“Resize Rules” allow you to set a maximum Height and Width in pixels. This tab allows multiple rules to be defined, each with there own “Filter” to determine which rule to apply. If no filter is defined, the first rule is used.

“Change File Type Rules” allow you to change images to a different format (BMP, GIF, JPG, PNG or TIF). This tab allows multiple rules to be defined, each with there own “Filter” to determine which rule to apply. If no filter is defined, the first rule is used.

“Watermark Rules” allow you add a watermark image over the original image on output. This feature is particularly useful for images that are available to the general public. This tab allows multiple rules to be defined, each with there own “Filter” to determine which rule to apply. If no filter is defined, the first rule is used.

Here is an example of a Rename Rule that might be used for Advance Auto (where 12345 is the vendor#):

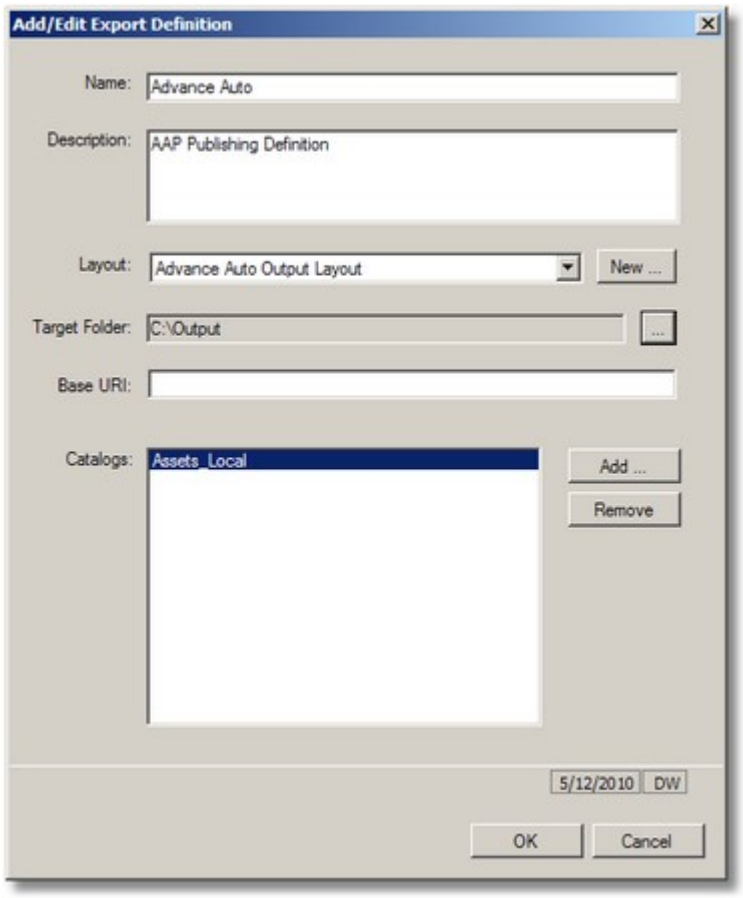


Now that you have a Folder Layout defined, you can use it to export assets.

9. Exporting Assets

The **File > Export…** function is used to copy (and translate according to output rules) assets to a disk location for delivery to your trading partners. A catalog does not need to be “Open” to be exported. In fact, an export can include assets from several Catalogs.

The Asset Export Maintenance screen manages the publishing process as explained below, but first you must create an Export Definition.



The “Layout” drop-down selects (or allows you to create) a Folder Layout as explained in the last section. The “Target Folder” becomes the root folder for the output. You must have write access to this folder and sufficient space to hold all of the assets. The “Base URI” field (if supplied) is pre-pended to the relative path to create the URI. One or more “Catalogs” can be selected for publishing. The Layout definition defines which assets are exported.

Before you can “Export”, you must “Publish”. This process determines what asset files will be delivered including which ones have changed since the last Publish. This can take a few minutes to process. You then have the option of exporting “Full” (all selected assets) or “Changes” (only those assets that have changed since the last Publish). Press the “Commit” button when the files have been delivered.

In addition to exporting the asset files, the Export process creates two “manifest” files according to the AAIA Imaging Best Standards.