

Portfolio™

Using XMP to drive your workflow

As a creative professional, you need to always have your important files at your fingertips. Using Extensis Portfolio meets that need by helping you stay organized, allowing you to quickly find files when you need them. To help you extend this organizational work, Portfolio supports Adobe's Extensible Metadata Platform (XMP). This technology allows you to embed data about your files directly into your source files from any Adobe application, and subsequently read that data with Portfolio or any other application that supports XMP.



This technical brief describes how to integrate XMP into your daily workflow, and gives you the details about setting everything up to function properly.

What is XMP?

First things first, just what exactly is Adobe's Extensible Metadata Platform? This labeling technology is also known as XMP and allows metadata to be embedded directly into the file itself. File Information such as descriptive text, keyword values, and other information then travels along with a file wherever it may be opened. Any metadata aware application such as Portfolio 8 can read the embedded metadata.

The XMP language is based on an XML structure which makes it highly readable and easy to write. XMP is used extensively by Adobe applications as well as several standards including Dublin Core and IPTC4XMP. It is an open language and allows users to customize the metadata that is embedded into supported file types.

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XMP is routinely used to store metadata such as keywords and descriptions, but can also store custom information such as job name, product sku, etc. This custom information can be read by Portfolio, and it's easy to inject and view your own information via XMP custom panels inside of most Adobe applications.

Using Portfolio as a tracking tool

Before we dig into the technical side of setup, it's good to understand how XMP can fit into your workflow. An emerging use for Extensis Portfolio is to use it as a workflow tracking tool. By teaming up several of Portfolio's features you can create an efficient workflow that includes tracking detailed project information including routing, approvals and even to-do lists. As an example, let's examine a sample workflow for an advertising agency. The agency has account reps, designers, production artists and a creative director. The agency needs to be able to know the status of each job, who is working on what and what assets belong to each project.

For this example, the agency starts the process by defining the information that they need track. This information includes: client name, job name, job status, if the file is approved, who approved it, what work needs to be done, who the file is routed to and any notes to the routed person. In order to track this information a number of custom fields are created in the agency's Portfolio catalog. For some of these fields, like Job Status, the administrator can create a pre-defined list of states like "ready for proof" or "in production," which can be easily set from a drop-down menu.

To continually track the status of custom fields in Portfolio, smart galleries can be used. When a smart gallery is opened, the gallery automatically finds files that contain specific custom field settings. For example, a smart gallery can be created for each step in the **Job Status** field. As agency members manipulate a file, they can update the file's status by changing the **Job Status** custom field. When the custom field status changes, the file is automatically included in the smart gallery associated with the new status. This allows the creative director to open a single gallery and see all of the files at that stage in the production cycle.

Users can also create smart galleries for to fit their own needs. Common uses could be inboxes or to-do lists. For example, using the **Routed To** custom field, a smart gallery can automatically search that field, and display all items that are routed to a specific user.

To further refine the data displayed in the smart galleries, custom views can be created that display the most important information. For example, a custom view named “workflow” that displays all of the custom fields at the same time can be applied as the default view for each smart gallery. This means that whenever a user opens one of the smart galleries, only the most relevant information is displayed. So, a smart gallery that is set to locate all files where Job Status is “in-production” would use the custom view to display the client’s name, what work needs to be done and to whom the file is routed.

After setting up the smart galleries and custom views, it is at this point where custom file info panels can be created. These info panels (or XMP custom panels) are accessed directly from Adobe applications, such as Photoshop or InDesign. These custom panels allow users to update custom fields directly from the File Information dialog boxes, without opening Portfolio. XMP custom panels must be installed into the proper location on each user’s machine, and configured so that Portfolio extracts the information into the correct fields.

By combining custom fields, smart galleries, custom views, XMP custom panels and the metadata extraction abilities of Portfolio, an effective project tracking and management system can be created. This system allows workgroups to share files, track progress and route files for approval. To get you started, Extensis has created a number of Portfolio sample catalogs that include pre-configured smart galleries, custom views and XMP custom panels. The **General Production** sample catalog and XMP panel is pre-configured for the example just described. Sample catalogs and XMP custom panels can be downloaded from the Extensis website <http://www.extensis.com>

The following pages detail the steps necessary to create custom file info panels, configure your Portfolio catalogs appropriately, and use Adobe Bridge to modify multiple files at once. For more information about smart galleries and custom views, please reference the Portfolio User Guide and the HTML Help system in Portfolio.

Creating and implementing an XMP custom panel

To use an XMP custom panel, there are a few necessary steps that you must follow:

1. Create the panel from scratch, use a third party tool, or modify a currently existing custom panel.
2. Install the panel in the appropriate locations on users' machines.
3. Add custom XMP metadata to a test file using the new XMP custom panel.
4. Create the necessary custom fields in Portfolio and map the import of XMP metadata fields to the appropriate fields.
5. Use the test file to verify that the installation works properly and that the metadata fields are mapped to the appropriate custom fields in your catalog.

Step One: Create the XMP custom panel

XMP custom panels can be created from scratch, by third party tools, or from an existing file.

Extensis offers three sample catalogs that include XMP custom panels. The sample XMP custom panels may be altered or used as a starting point for creating your own panel. As a starting point, Extensis recommends modifying the sample XMP custom panels.

When creating an XMP custom panel from scratch or editing an existing file, you can use any text editor. For example, you can use **Notepad** (Win) or **TextEdit** (Mac) and save your results as a plain ASCII text file. The file must be saved with either the .TXT or .XMP filename extension.

Note: Do not save the file with RTF file formatting.

For complete details about creating an XMP custom panel from scratch, as well as the command dictionary necessary to modify existing panels please refer the Adobe guide to creating XMP Custom File Info Panels: http://partners.adobe.com/public/developer/xmp/sdk/topic_cust_file_info_panels.html

If you choose not to modify an existing template, the following text can be used as the starting point for creating an XMP custom panel from scratch:

```
<?xml version="1.0">

<!DOCTYPE panel SYSTEM "http://ns.adobe.com/custompanels/1.0">

<panel title="$$$/CustomPanels/Panels/Extensis/PanelName=Portfolio Workflow"
version="1" type="custom_panel">

    group(placement: place_column, spacing: gLargeSpace, horizontal: align_
fill, vertical: align_top) {

        group(placement: place_row, spacing: gSpace, horizontal: align_fill,
vertical: align_top, reverse: rtl_aware) {

            static_text(name: '$$$/CustomPanels/Panels/extensis/
AssetStatus=Asset Status', font: font_big_right, vertical: align_
center);

            popup(items: '$$$/CustomPanels/Panels/Extensis/Asset Status=01
UnEdited{01 UnEdited};02 Re-Edit{02 Re-Edit};03 Color Correct{03 Color
Correct};04 Proof{04 Proof};05 Copyright{05 Copyright};06 Final{06
Final};07 Complete Go Live{07 Complete Go Live};08 Archived{08
Archived};DO NOT USE{DO NOT USE};', xmp_ns_prefix: 'extensis',
xmp_namespace: 'http://ns.extensis.com/extensis/1.0/', xmp_path:
'AssetStatus');

        }

    }

</panel>
```

To use one of the sample XMP custom panels, download the sample catalogs files from the downloads section of the Extensis website: <http://www.extensis.com/downloads/>

The sample catalogs ZIP file includes three sample catalogs, matching XMP custom panels as well as tutorial files about how to install and use each sample. The agency example at the beginning of this document uses the General Production sample catalog and XMP custom panel.

A third party tool can also be used to create an XMP custom panel. Pound Hill Software offers a number of applications that can help you create your initial XMP custom panels. The free, yet limited MetaSampler application allows the basic creation of a simple XMP custom panel.

To create XMP custom panels that contain more complex and extensive metadata, you may wish to purchase their MetaGrove™ Developer application.

The free MetaSampler application can be downloaded from: <http://www.poundhill.com/>

Step Two: Install the XMP custom panel on users' machines

For users to be able to access the XMP custom panel from within Adobe software products, the .TXT or .XMP file for the panel must be placed in the appropriate locations on users' machines. The files must be placed in either of the following locations depending upon platform:

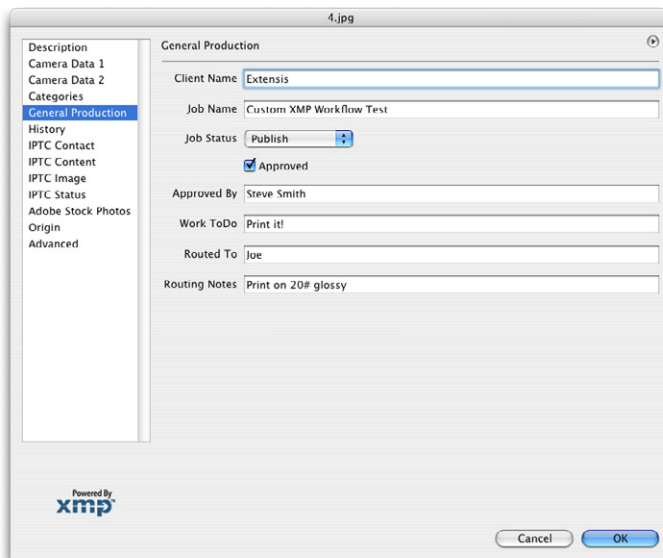
- Mac OS X:
{Root Volume}/Library/Application Support/Adobe/XMP/Custom File Info Panels
- Windows:
\Program Files\Common Files\Adobe\XMP\Custom File Info Panels

If the files are not installed in the appropriate locations, when the File Info dialog box is opened in any Adobe application, the new XMP custom panel will simply not be displayed.

Step Three: Add test metadata to a file using the new XMP custom panel

Before moving onward, create a test file to which you can add metadata that can be extracted in future steps.

1. Open a test .JPG file in Adobe Photoshop
2. Choose **File > File Info**



3. Choose the name of your custom info panel from the list on the left. In this example, we kept the name from the General Production sample panel.
4. Enter sample data into each metadata field.
5. Click OK to dismiss the File Info dialog box.
6. Save and close the test file.

Step Four: Create and map custom fields in Portfolio

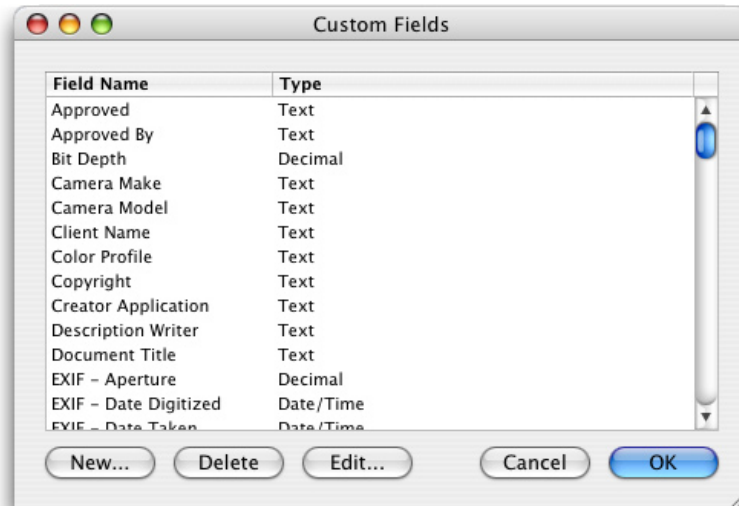
After creating your XMP custom panel, you need to add custom fields to your catalog that match the metadata fields in your panel.

To add a custom field to a catalog:

1. Change your access level to Administrator mode.

Choose **Catalog > Access Level**, change the Catalog Access level to Administrator and enter the password if necessary, then Click OK.

Note: For catalogs served by Portfolio Server, no other users may be logged in to the catalog while adding custom fields.



2. Choose **Catalog > Custom Fields**.
3. In the Custom Fields dialog box, click **New**. The New Field dialog box is displayed.
4. Enter a name for the field in the Name text box (i.e. Asset Status)
5. Choose the field type.

The field type determines the values that can be entered into this field. The most commonly used field type for custom applications is Text. Field types cannot be changed once they are defined. See the Portfolio User Guide for complete details.

6. Select the appropriate remaining options for the field type you selected. If you would like to use a predefined list, select the predefined list option and create the list. Click **OK** to return to the Custom Fields dialog box. .
7. When you have finished adding Custom Fields, click **OK**.

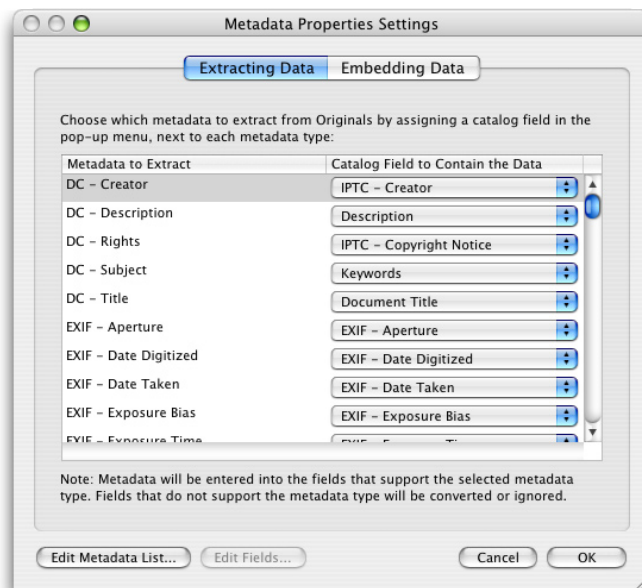
After creating the custom fields, you need to tell Portfolio what metadata fields to expect, and where to store the data in the catalog for files that contains the new metadata. Keep the list of fields included in your new XMP custom panel handy for reference while implementing the new fields and mappings in Portfolio.

To create a new metadata field:

1. In the Advanced Cataloging options dialog box, on the Properties tab, click the **Settings** button.

– OR –

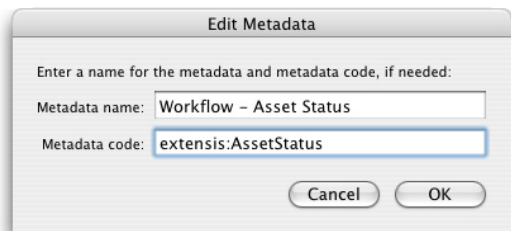
Choose **Catalog > Metadata Settings**.



2. In the Metadata Properties Settings dialog box, click the **Edit Metadata List** button.
3. In the Metadata List dialog box, click **New**.



4. Enter a new Metadata Name (i.e. Workflow – Asset Status) and Metadata Field (i.e. extensis:AssetStatus). The syntax is namespace:fieldname



5. Click OK to save your changes to the Metadata List.

After adding all of the new Metadata fields, change the field mapping so that the metadata in your XMP Custom Palette is placed in your new custom fields when you catalog the files.

To change a field mapping:

1. In the Advanced Cataloging options dialog box, on the Properties tab, click the **Settings** button.

– or –

Choose **Catalog > Metadata Settings**.

2. In the Metadata Properties Settings dialog box, on the Extracting Data tab, click to highlight the specific Metadata to Extract field to update (i.e. Workflow – Asset Status).
3. On the right hand side of the dialog, click the corresponding Catalog Field to change (i.e. Asset Status).

Step Five: Verifying the new XMP custom panel

After adding and mapping the new metadata fields, you are ready to extract the information from your test file. If your test file has already been added to your Portfolio catalog, you need only update the file to add the new metadata from the XMP custom panel. Files already in your catalog must be manually updated to reflect changes in metadata made via any Adobe application. To have your files automatically updated, use the FolderSync or AutoSync feature. See page 78 of the Portfolio User Guide for complete details.

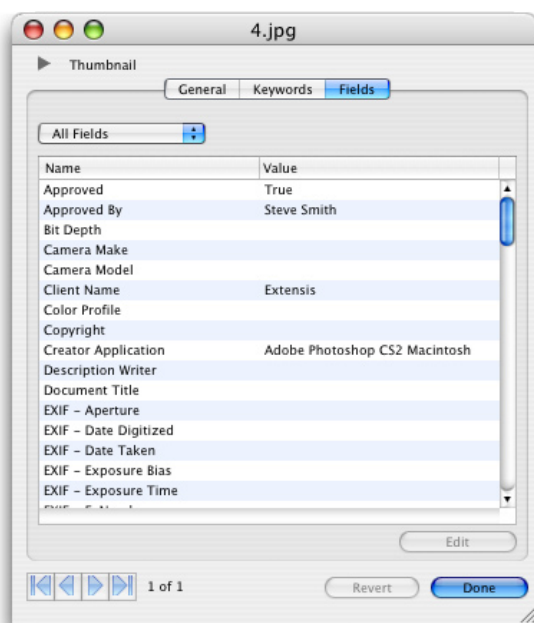
To update an already cataloged file:

- Select the test file in your catalog and choose **Item > Update**

If the test file isn't already in your catalog, add it to your catalog. Because you have already configured your metadata mapping, when the test file is cataloged the appropriate custom fields will automatically be populated.

To verify that the test file contains the new data:

1. Choose Item > Item Properties
2. In the File Info dialog box, select the Fields tab. Verify that the correct field information has been updated or created



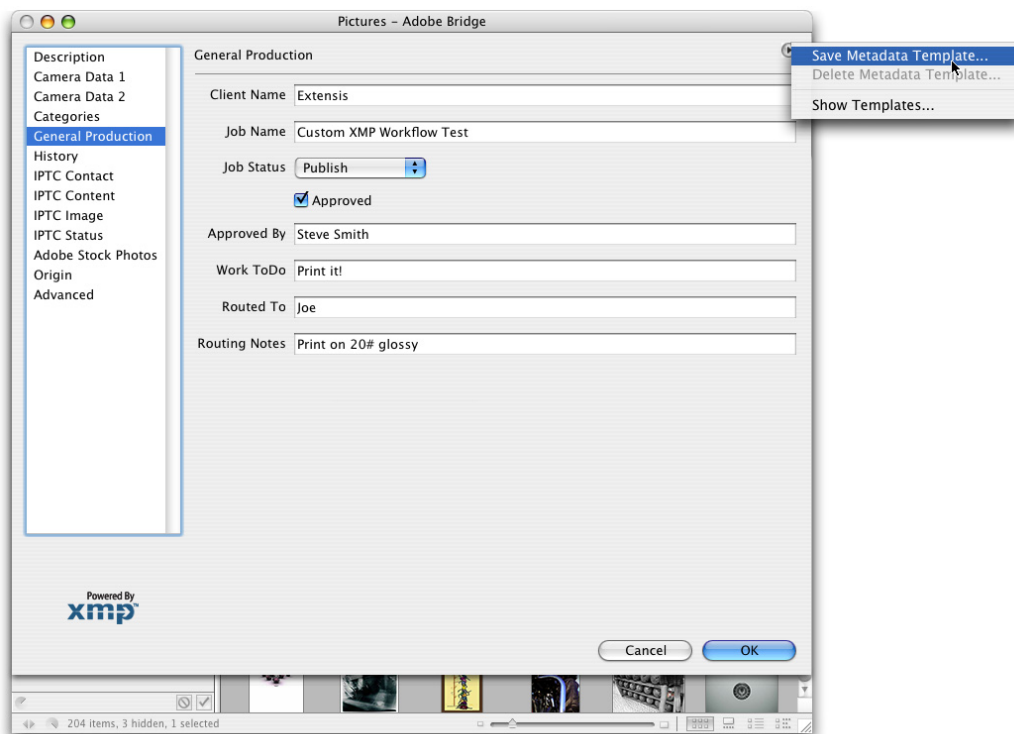
Further automation with Adobe Bridge

After creating your XMP custom panel and properly configuring your Portfolio catalog, you can enter metadata directly from the File Info dialog box of any Adobe application. Using the metadata template feature in Adobe Bridge, you can append or replace metadata in multiple items at the same time.

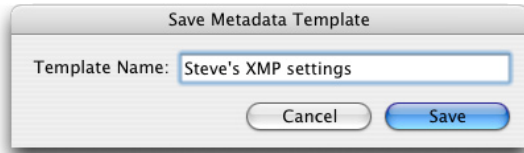
To append metadata using Adobe Bridge:

1. Launch Adobe Bridge
2. Select an item for which to update metadata.
3. Choose File > File Info
4. Select your XMP custom panel from the list on the left. Enter or change any desired metadata.
5. From the upper right-hand corner of the File Info dialog box, click the arrow and choose **Save Metadata Template**

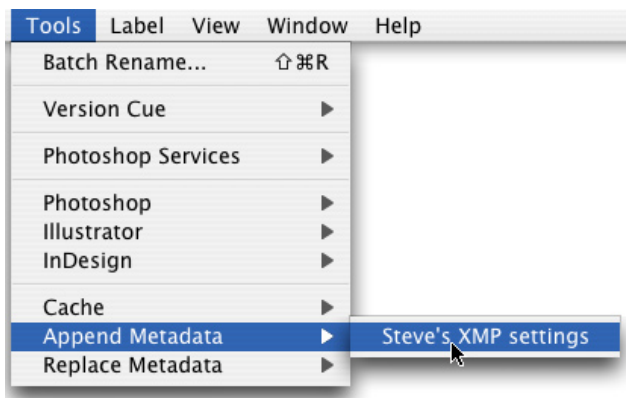
This saves all of the current XMP settings as a template that can be applied to any other item recorded in Bridge.



6. In the Save Metadata Template dialog box, enter a template name and click **OK**.



7. Click **OK** save the XMP information to the current file and dismiss the File Info dialog box.
8. At this point, select the items to update the Adobe Bridge main window.
9. Choose **Tools > Append Metadata > <template name>** to append the metadata in your template to the selected items.



– or –

Choose **Tools > Replace Metadata > <template name>** to replace the metadata in the selected items with all of the metadata contained in your template.

Note that the Replace Metadata command will write blank fields over those that already contain data and may have undesired consequences.

The last word

For product updates, the most current sample files and answers to technical issues, please visit the Extensis website: <http://www.extensis.com>

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