

Portfolio Link

Description

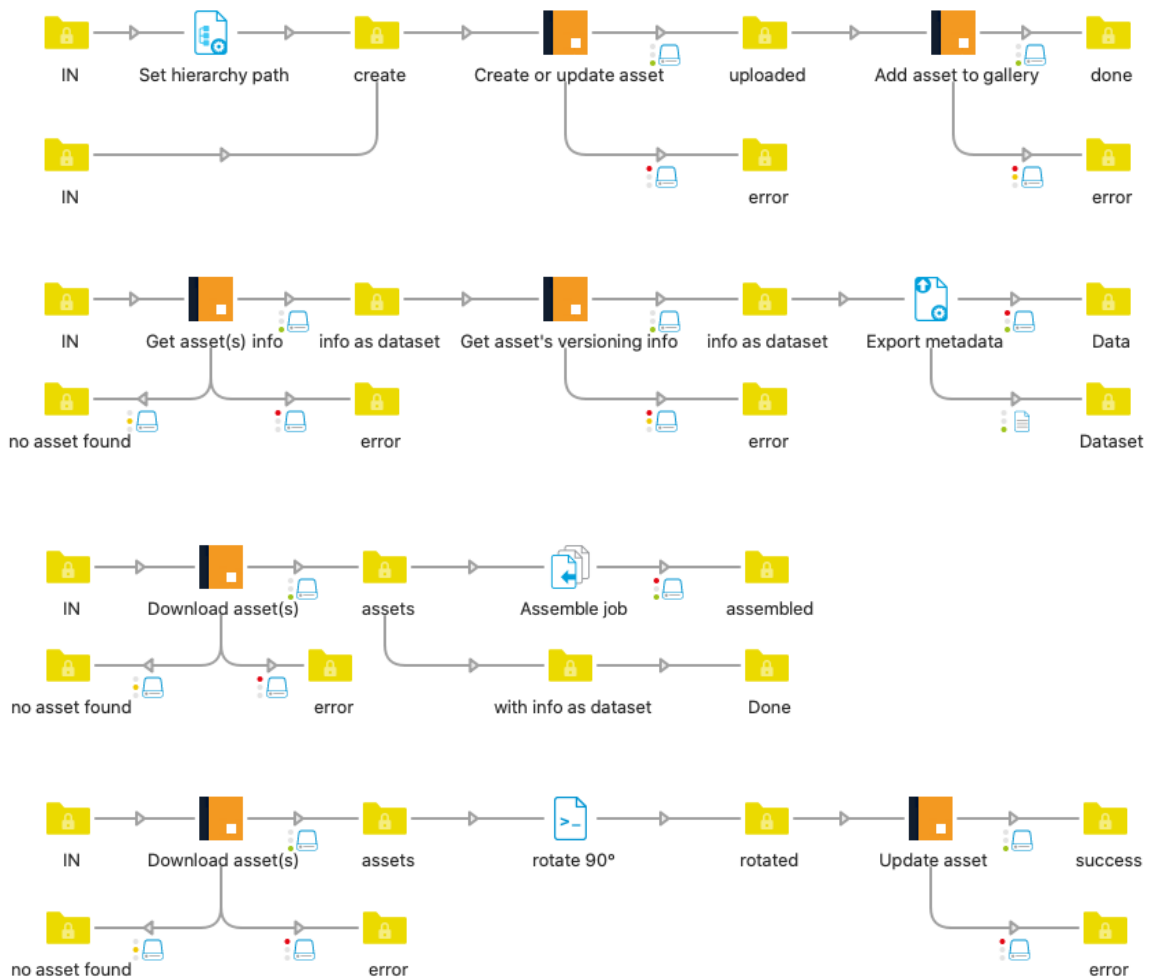
Extensis Portfolio makes it easy to share digital assets with your remote team members, partners, and customers no matter where they are. This digital asset management system allows you to send the right files to the right people at the right time, every time.

This app links Extensis Portfolio DAM with Enfocus Switch.

Create, update, download or delete your assets.

Add metadata to your assets, add them to or remove them from galleries.

Get asset's properties and metadata or versioning info as Switch datasets.



Tasks and Flow elements properties

- Server url
 - including http(s) and port number. e.g. http://192.168.68.100:8090
- API token
 - See https://helpdocs.extensis.com/en/portfolio/administration/current-4/Content/01_Admin/11_api_tokens.htm to generate an API token.
- Catalog
 - Portfolio catalog to use. Use 'Select from library' to get a list of existing catalogs. If you use any other method, be sure to use an existing name, or the job will error.
- Task
 - Select the task you want to do, more info per task below
- Select asset(s)
 - For most tasks you will have to select assets. This can be done:
 - by asset ID (added as private data by most tasks),
 - by query (field, operator, value)
 - by gallery (all assets from a gallery)
 - Use 'Select from library' to get a list of existing fields or galleries. If you use any other method, be sure to use an existing name, or the job will error.
 - When you do a query with multiple fields and mix AND and OR logical operators, the logic is: (query1 logicalOperator1 query2) logicalOperator2 (query3 logicalOperator3 query4)

If the job errors with any task, it is sent to the error connection. The error or warning message is logged and saved as private data with key 'PortfolioLinkError', should you need to send this information by email or any other method.

Create asset

The job is uploaded to Portfolio, and a private data is added to the job with the Portfolio asset ID, so that you can use it to select the right asset further in the flow.

Only single file jobs are supported. Ungroup job folders upfront if necessary.

If the asset already exists, a number suffix will be added by Portfolio (default behavior).

- Destination path
 - Path where the asset should be uploaded in Portfolio, separated by :
E.g. subfolder1:subfolder2
The subfolders will be created in Portfolio if needed.
Leave empty for root level.
- Add job hierarchy to destination path
 - Add the job hierarchy to the destination path.
The subfolders will be created in Portfolio if needed.
- Asset ID private data key
 - The asset ID of the new asset will be saved in this private data, by default 'assetID'.

Update asset

The job is uploaded to Portfolio as an update of an existing asset, as a new version. This is only supported by Vault type catalogs.

- Asset ID
 - Asset ID of the asset to update, by default [Job.PrivateData:Key="assetID"]
- Version comment
 - Comment attached to the new version, can be empty.
The Portfolio comment through the API does not support accents or other variations (diacritics) or some special characters like %\$§!
The comment is cleaned automatically, but if the asset is not updated, try without special characters, this should help.

Create or Update asset

If the asset with the same path already exists, it will be updated.
If it does not exist yet, or the catalog is not a Vault catalog, the asset will be created.
The properties are common with Create asset, with the addition of Version comment.

Download Asset(s)

Asset(s) are downloaded, based on a selection (by ID, query, or collection).
You can choose for the original files or for the preview files (created by Portfolio).
For each downloaded file, a dataset is added with the asset's properties and metadata.

Portfolio Link stores the following private data in the internal job ticket for each downloaded file in order to easily assemble them in a job folder further in the flow:

- <key>.JobID
- <key>.JobName
- <key>.NumFiles
- <key>.FilePath

The default value of the private data key is 'Ungroup', so that if you use the 'Assemble job' element with the 'Ungrouped job' scheme, all files are assembled automatically, with creation of the hierarchy if you increase the 'Subfolder levels' property of the 'Assemble job' element.

Delete asset(s)

Selected assets will be deleted.

- Maximum number of assets to delete
 - For security reasons, if the query returns more assets than this limit, they won't be deleted at all, and the job will be sent to the warning connection.

Get asset(s) info

Get selected asset(s) properties and metadata as Switch dataset.

Note that the spaces are removed from the field names, as spaces are not supported in xml element names.

- Report info as
 - One dataset attached to the incoming job
 - Separate xml files, each with own dataset
 - Asset ID private data key: each xml file will get corresponding asset ID in this private data, by default 'assetID'.
 - Incoming job: send to output / discard
- Dataset name
 - By default 'Portfolio info'

Get asset's versioning info

Get asset's versioning info as Switch dataset.

- Asset ID
 - Asset ID of the asset to get versioning info for

Add metadata to asset(s)

- Field 1 to 5
 - Select field to edit
- Action: Add or replace.
 - Use add only for multi entry fields like Keywords
- Value
 - Value to add or replace with
- Advanced mode
 - You can write several lines, each line with 3 variables separated by ::
 - // filename::action::value
 - // The field names are case sensitive
 - // Use 'add' action only for multi entry fields like Keywords
 - // Lines beginning with // are comment lines and will be ignored
 - // Lines with less or more than 3 elements will be ignored
 - // For values including several lines (like File description), use fields 1 to 5
 - // examples:
 - Keywords::add::Extra keyword
 - File Description::replace::New file description

Add asset(s) to gallery

Add selected asset(s) to a specific Portfolio gallery.

- Gallery name
 - To add or remove assets to a gallery it has to be public and no smart gallery. Private galleries or smart galleries do not appear as a destination in Portfolio Link. It does not matter if the gallery is read-only because that only refers to the editing of the gallery itself by other users but not to the addition or removal of other assets.

Remove asset(s) from gallery

Remove selected asset(s) from a specific Portfolio gallery.

- Gallery name
 - See remark above

Connections

Portfolio Link requires at least one input and three output connections.

Successful jobs will be sent to the 'success' output connection(s).

If no assets are found with the query, the job will be sent to the 'warning' output connection(s).

If an error happens, the incoming job will be sent to the 'error' output connection(s).

The error or warning message is logged and saved as private data with key 'PortfolioLinkError', should you need to send this information by email or any other method.

Compatibility

Switch 2021 Spring and higher, Windows & Mac