Connected Platform | Marcom Portal Create Asset Integration

User Guide

MarcomCentral®
A RICOH Company

Table of Contents

..... 1

Overview 4

MarcomPortal Account Setup 5

MarcomPortal Admin | Get the Web Service Token 5

MarcomGather Account Setup 5

Enable Connector 5

Enable Product Profiles 6

How to Add Assets to a MarcomPortal 6

Sync Notifications and Status Indicators 7

Sync Status Toaster Message 7

Asset History Notification 8

Sync Status Indicators 8

Sync Message Pop-Up | When Selected Assets have Already been Added to MarcomPortal Folder 9

Sync Message Pop-Up | When Selected Assets have not Finished Processing from Recent Upload 9

To Add a Single Asset 10

Use the Ellipsis Menu 10

Use the MarcomPortal Header Button 11

To Add Multiple Assets 12

To Add Assets Using Product Profiles 13

To Publish Assets in MarcomPortal 14

How to Manage Assets 14

To Update Asset Name, Description, Tags, Etc., ... 15

To Replace Assets (Upload Revision) 15

To Stop or Restart Asset Sync 16

Stop Sync 16

Restart Sync 16

To Delete Assets 16

What Information Transfers to MarcomPortal 17

MarcomGather Asset vs MarcomPortal Asset 17

Error Tracking 18

MarcomGather Sync Error History Log 18

Error Troubleshooting Tips 18

Connection Issue – "Not connected" MarcomPortal Folder Error 18

"Stop Sync to MarcomPortal" Does Not Stop Sync and Creates Subsequent Assets in MarcomPortal Admin 19

Error Log Message Shows Something about "Payment method required" 19

Error Log Message Shows Something about "Expiration date missing or is required" 19

FAQs 20

Can Both Library and Create Asset integrations be used at the same time? 20

Will MarcomPortal assets sync back to MarcomGather? 20

What MarcomPortal asset fields can I edit after syncing? 20

Can I pick and choose which assets to add to my MarcomPortal? 20

Can I add multiple SKUs to my MarcomPortal asset? 20

Can I make my asset Digital Delivery & Print or Print Only? 20

Is there a way to publish the asset to my MarcomPortal automatically? 20

If I make changes to assets in MarcomGather will I have to republish the assets in MarcomPortal Admin? 21

I uploaded a previously deleted asset, but now it looks like I have two assets in MarcomPortal Admin. Why? 21

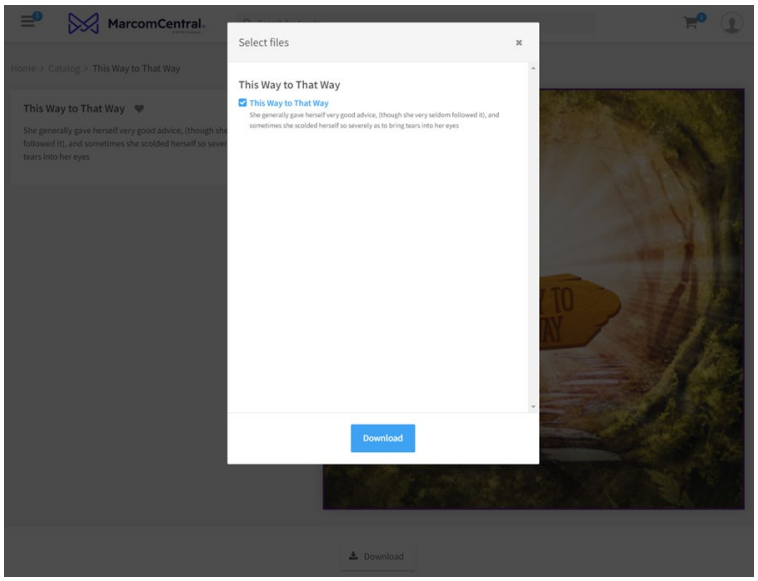
Overview

With a few clicks, this MarcomGather integration will create a static asset in your MarcomPortal. Supported asset types are:

- Images: BMP, CR2, DNG, EPS, GIF, HEIC, JPG, JPEG, NEF, PNG, Raw, SVG, TIFF or TIF, ICO
- Videos: AVI, HEVC, LRV, MOV, MP4, MPEG, SWF, VID, WMV
- Audio: AAC, AIF, FLAC, M4A, MP3, MP4, WAV, WMA
- Adobe Creative Suite Files: Acrobat (PDF), Photoshop (PSD), Illustrator (AI), InDesign (INDD), XD
- Adobe Swap Exchange (.ase)
- HTML
- Microsoft Office Files – Word, PowerPoint, Excel, Publisher
- Sketch
- TXT
- Keynote
- Fonts: TTF, OTF, WOFF
- Zip

Each asset created, in the MarcomPortal Admin will:

- Be a static asset (Product) type.
- Be a free download only delivery type.
- Contain only one SKU that is a downloadable file URL.



Note: when an asset is synced/added to MarcomPortal Admin it will still need to be manually added, activated, and published to the Catalog to be visible in the Portal to users.

MarcomPortal Account Setup

MarcomPortal Admin | Get the Web Service Token

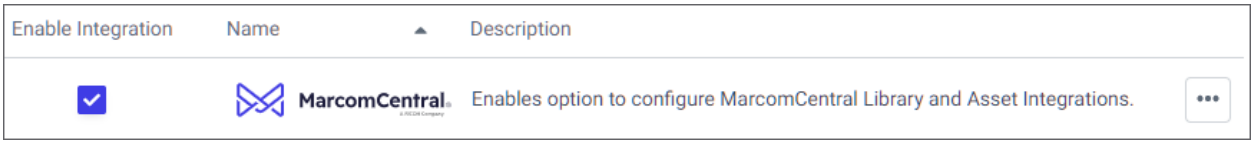
The web service token must be created by a MarcomCentral Support Representative. It will correspond to a specific portal. Once you receive the token, you can proceed with the steps below.

MarcomGather Account Setup

Enable Connector

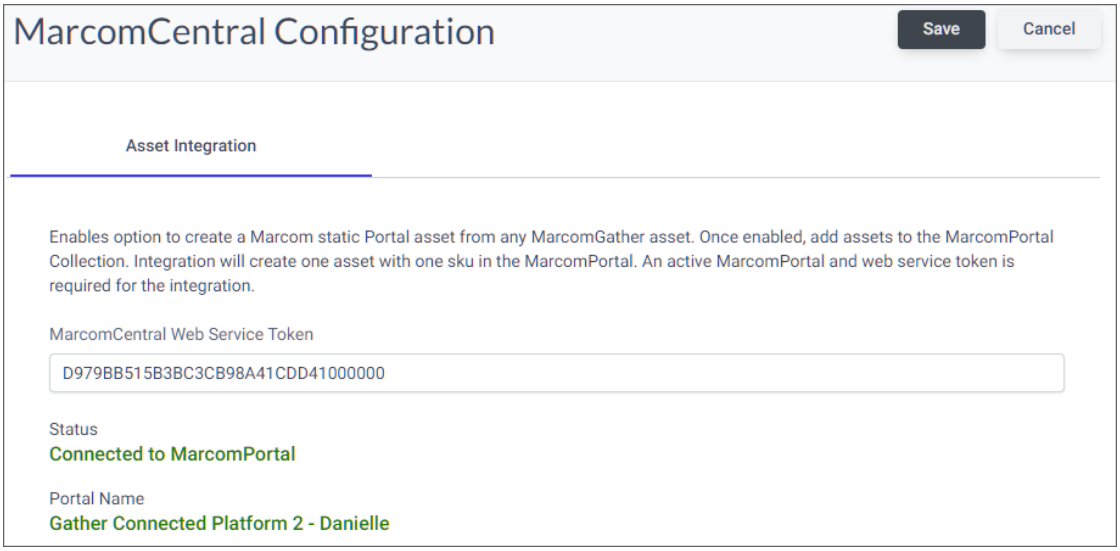
You can add the web service token to your account by completing the following steps:

1. Once logged into the MarcomGather account, go to Settings | click **Integrations**.
2. Check the option "**Enable option to configure MarcomCentral Library and Asset Integration**."



3. From the ellipsis menu, click "**Edit**."
4. Click on the Asset Integration tab
5. Enter the MarcomCentral Web Service Token provided.
6. Save.

Saving will verify the token. When complete the status will update to Connected to MarcomPortal and the connected MarcomPortal name will show.



Other status:

- Not connected to MarcomPortal | Token has not been added or saved to start the initial connection.
- Connecting to MarcomPortal | Token has been added and saved and is connecting.
- Connection error, please contact support | Token has been added and saved and tried to connect and an error has occurred. Contact your Marcom Support Representative for assistance.

Enable Product Profiles

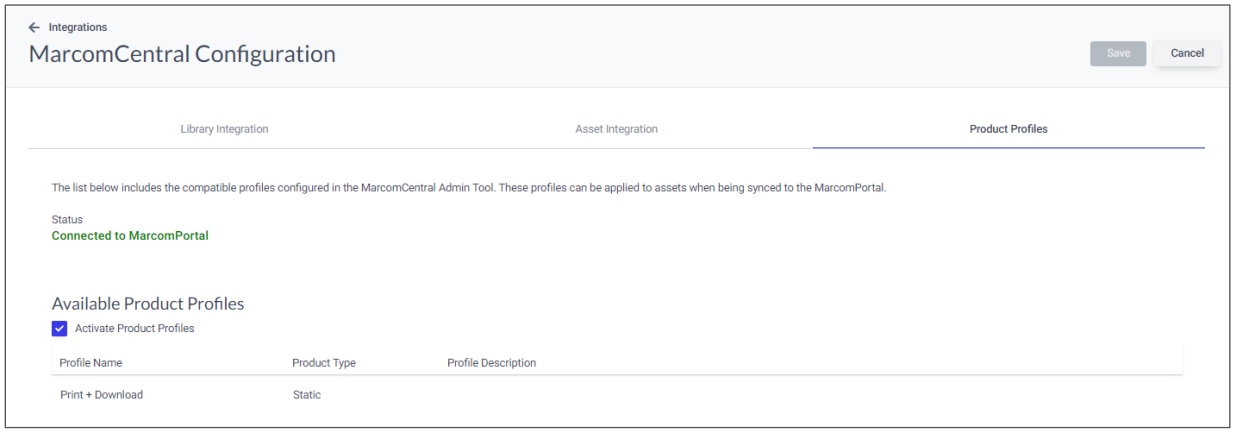
Assets can be assigned a Product Profile when they are synced to MarcomPortal. It allows products to be created with additional settings pre-selected.

For example, if you are setting products up for print and download, you can create a Product Profile and apply the profile when syncing assets from Gather to MarcomPortal. When the product is created in MarcomPortal, it will have predefined settings from the profile.

To enable Product Profiles in MarcomGather, do the following:

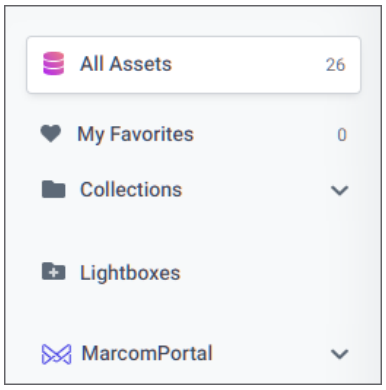
1. From the **MarcomCentral Configuration** page, click the **Product Profiles** tab.
2. Click the box "**Activate Product Profiles**".
3. **Save**. All Product Profiles will be listed under the "Available Product Profiles" section.

Now, when an asset is first synced to MarcomPortal a Product Profile will also need to be selected.



How to Add Assets to a MarcomPortal

If the token has been added successfully a new folder called MarcomPortal will show in the side panel. When clicked on the page will show "**No assets shared with MarcomPortal**"



The following sections below will review how to add and update assets with the Connected Platform. Single or multiple assets can be added from the following areas in MarcomGather:

- Library page
- A Collection
- A Sub Collection
- The Edit Asset page

However, first, it is important to understand and know what to expect with the sync process. This includes the different notifications and statues indicators that will occur throughout the sync processes.

Sync Notifications and Status Indicators

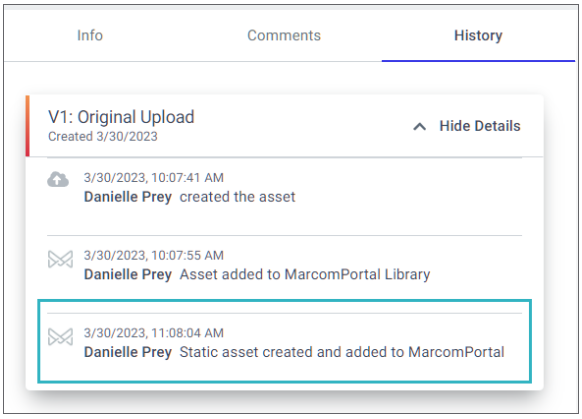
As assets are synced and re-synced various messages and indicators will appear to help identify the status.

Sync Status Toaster Message

A sync status toaster message will appear at the bottom of the page when assets are initially synced to MarcomPortal Admin.

Asset History Notification

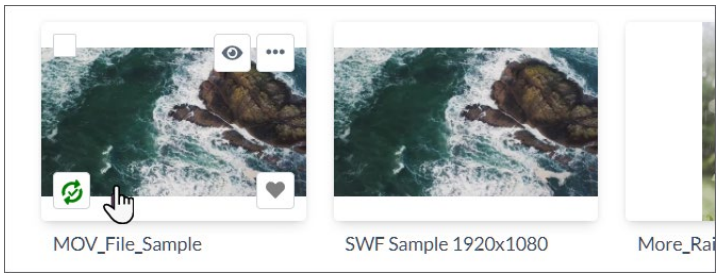
In Asset History, a notification will appear when added to the MarcomPortal folder. The notification will include the date, time, and who added the asset.



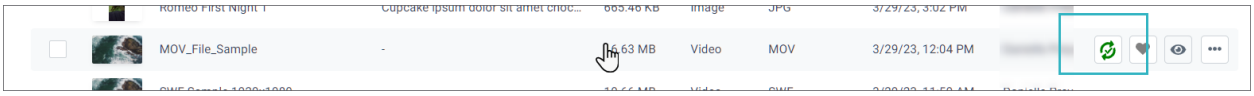
Sync Status Indicators

Sync status indicators icons will show for assets added to the MarcomPortal folder. The three statuses are success, pending, and error.

For the grid (small, medium, and large) views and masonry view the status indicators are located at the bottom left of the thumbnail.



For the list view the status indicator is located at the far right of the assts row.



The sync status indicators will not show if the asset:

- Sync is stopped. See section Stop Sync.
- Is expired. See section To Add/Update the Asset Expiration Date Field.
- Is not synced to MarcomPortal.

Green "Success" Sync Status

When a sync is successful it will be green and have a checkmark. The success status will remain on the asset thumbnail (or asset list view) and can only been seen when hovered over.

The success status will change if an asset was updated, and it is syncing the information to the MarcomPortal Admin or if there is an error with the sync.

Yellow "Pending" Sync Status

A yellow spinning status indicator means a sync is in process. It will continue to show and spin on the asset thumbnail (or asset list view) until the sync is complete.

Red "Error" Sync Status

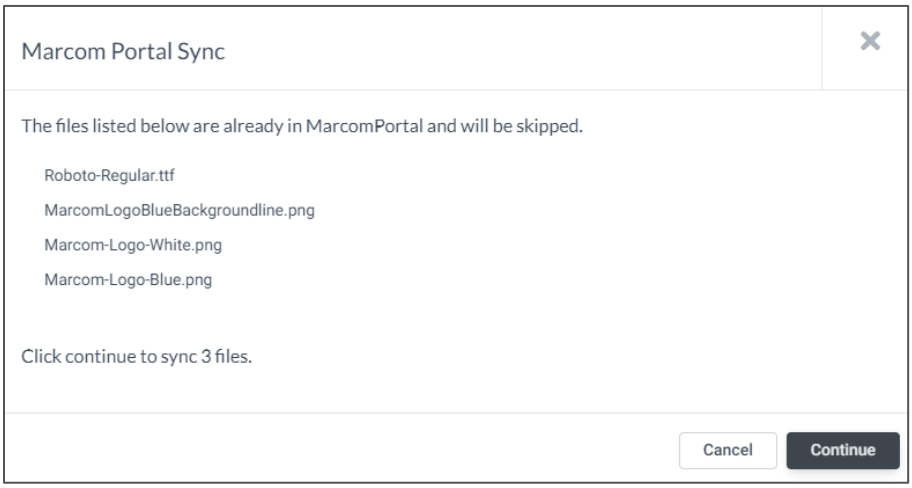
If red with an exclamation mark/point it indicates an error has occurred. It will continue to show on the asset thumbnail (or asset list view) until the issue has been resolved.

See section Error Tracking for more information on errors.

Sync Message Pop-Up | When Selected Assets have Already been Added to MarcomPortal Folder

If syncing multiple assets and 1+ have already been added to the MarcomPortal folder a pop-up will appear, prior to the sync, indicating those assets will be skipped.

In the example screenshot below, seven assets were selected. Four have previously been added to the MarcomPortal folder. Three have not. When "Continue" is clicked the sync will begin for the three assets.

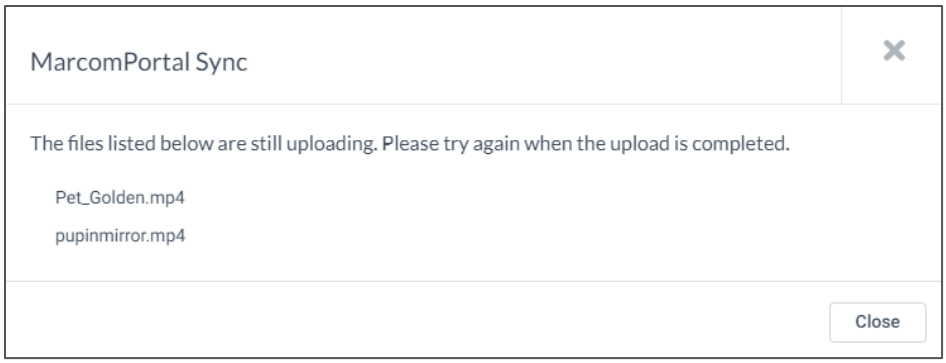


If "Cancel" is clicked, the sync will not happen, the pop-up will close.

Sync Message Pop-Up | When Selected Assets have not Finished Processing from Recent Upload

When large asset files are initially uploaded to MarcomGather sometimes it will take a few moments to finish processing before they can be synced to MarcomPortal.

If syncing 1+ assets that have not finished processing a pop-up will appear, prior to the sync, indicating those asset files cannot be added to the MarcomPortal folder until finished.

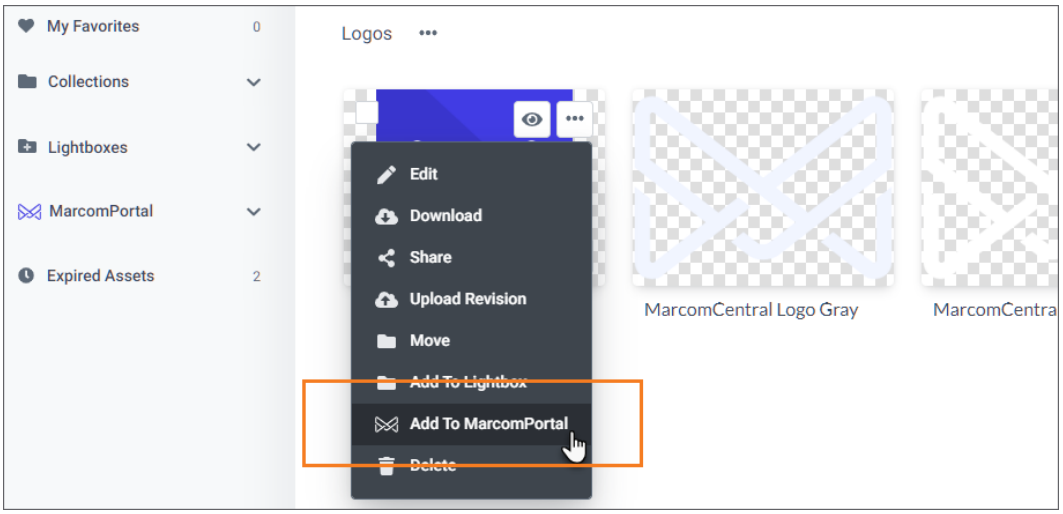


To Add a Single Asset

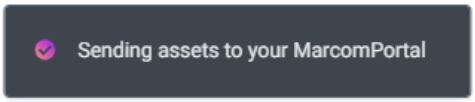
The following is the workflow of adding an asset without Product Profiles enabled.

Use the Ellipsis Menu

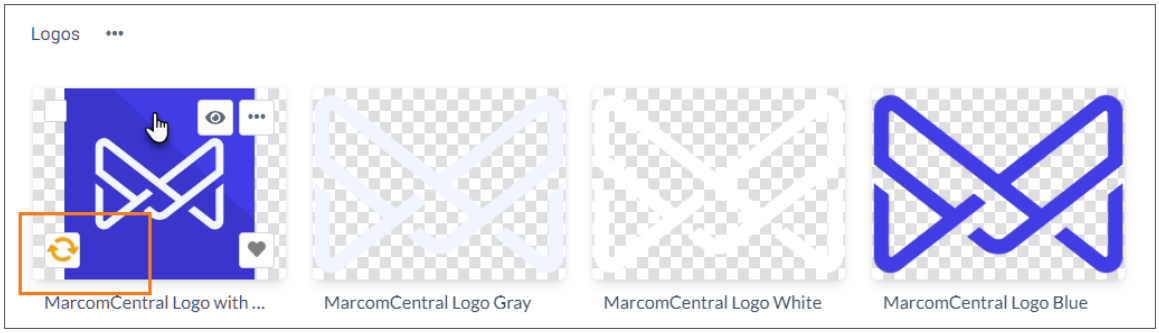
1. From the Library page, a Collection, a Sub Collection, or the Edit Asset page click the **asset ellipsis menu**.
2. Click "**Add To MarcomPortal**".



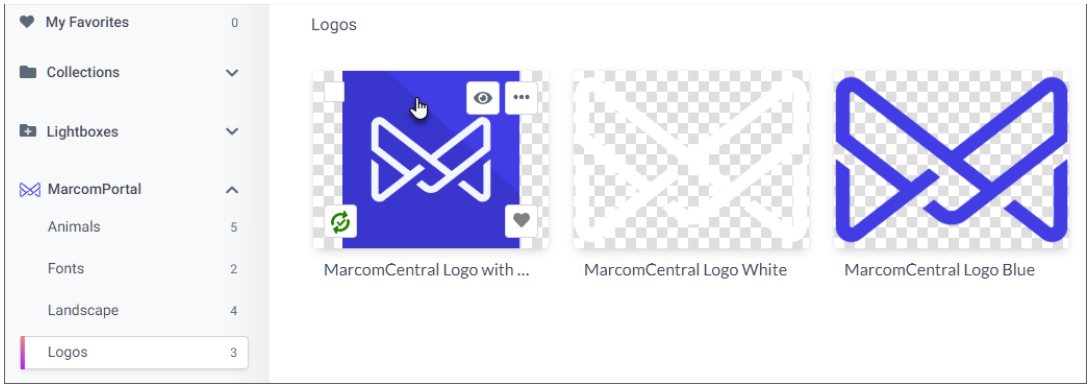
A toaster message will appear indicating the asset is being added.



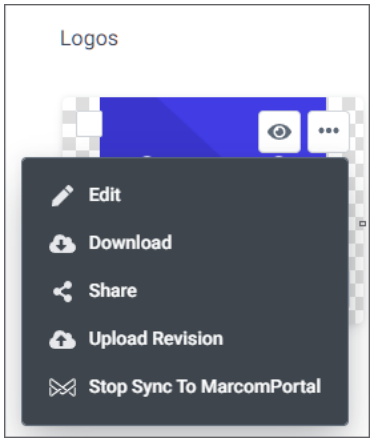
Hover over the asset to see the sync status indicator at the bottom left of the thumbnail. As the asset is syncing the status indicator is yellow and will spin.



Once complete, a success toaster message will appear indicating the asset has been added. Hover over the asset to see the green success sync status indicator at the bottom left of the thumbnail. The added asset will now show in the MarcomPortal folder.



Note, the "Add To MarcomPortal" ellipsis menu option has now changed to "Stop Sync to MarcomPortal". See section To Stop or Restart Asset Sync for more information.



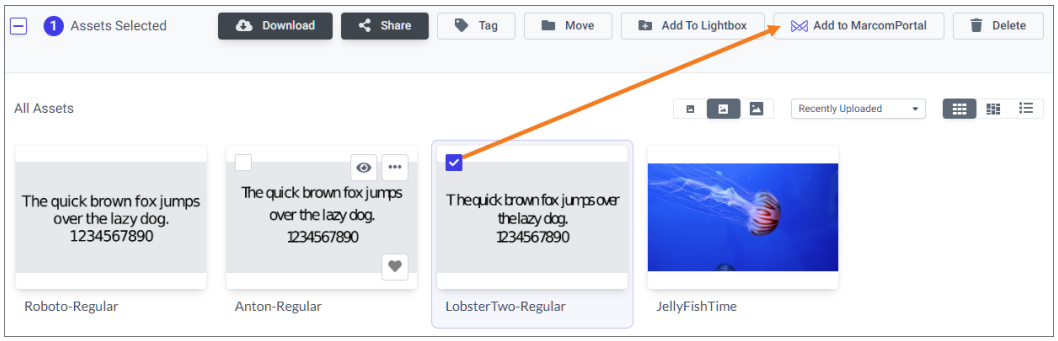
Use the MarcomPortal Header Button

The following is the workflow of adding an asset without Product Profiles enabled.

A single asset can also be added by using the "Add to MarcomPortal" button located in the bulk header.

1. Check on the asset.

2. Click the button "**Add to MarcomPortal**" in the header or the ellipses



Like the other workflow, a toaster message will appear and the yellow spinning status indicator will show (when hovering over the thumbnail).

Once complete, a success toaster message will appear indicating the asset has been added. Hover over the asset to see the green success sync status indicator at the bottom left of the thumbnail. The added asset will now show in the MarcomPortal folder.

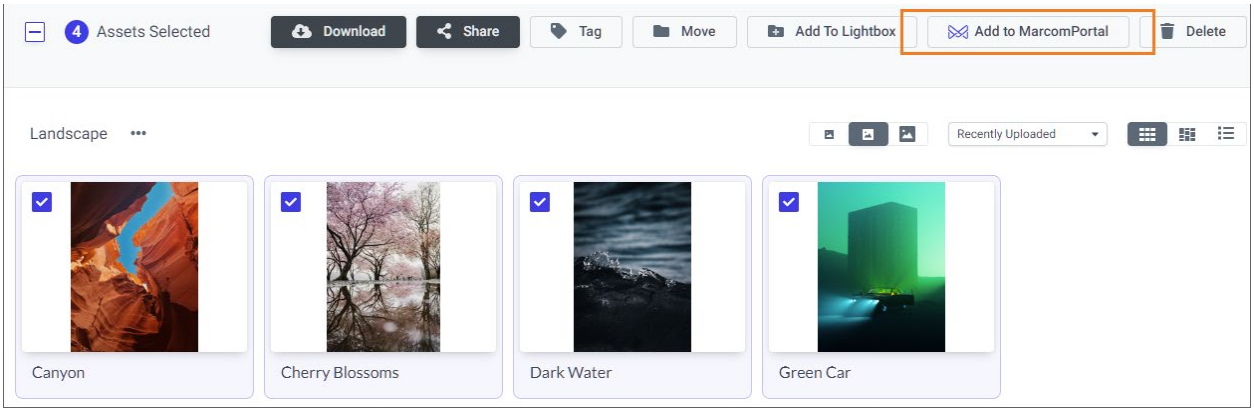
To Add Multiple Assets

The following is the workflow of adding an asset without Product Profiles enabled.

Multiple assets can be added from the Library page, a Collection, or a Sub Collection.

1. **Check on the assets**.
2. Click the button "**Add to MarcomPortal**".

If syncing a large number of assets, it may take a few minutes for the sync to complete.



Like the other workflow, a toaster message will appear and the yellow spinning status indicator will show (when hovering over the thumbnail).

Once complete, a success toaster message will appear indicating the assets have been added. Hover over the asset to see the green success sync status indicator at the bottom left of the thumbnail. The added assets will now show in the MarcomPortal folder.

Under the ellipsis menu, for each asset, "Add to MarcomPortal" will now show "Stop Sync to MarcomPortal". See section To Stop or Restart Asset Sync for more information.

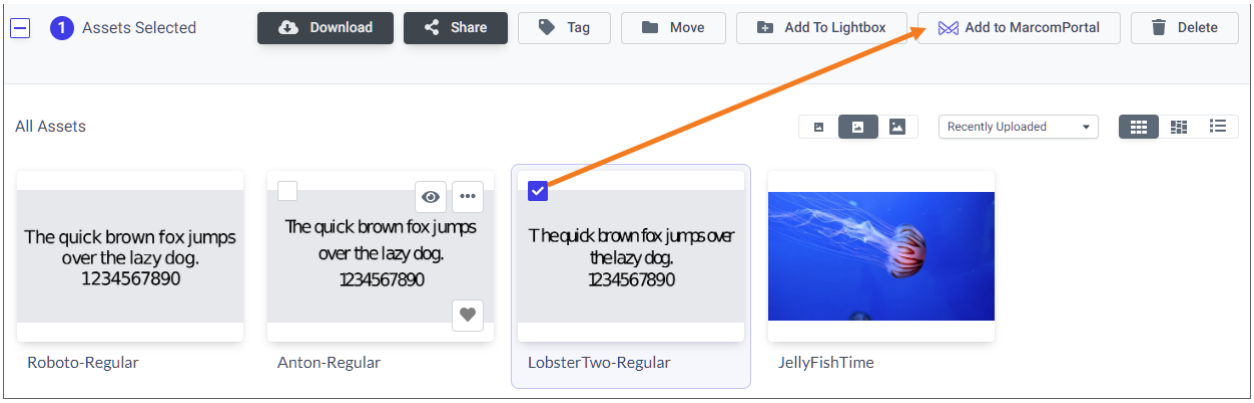
To Add Assets Using Product Profiles

The following is the workflow of how to add assets using Product Profiles.

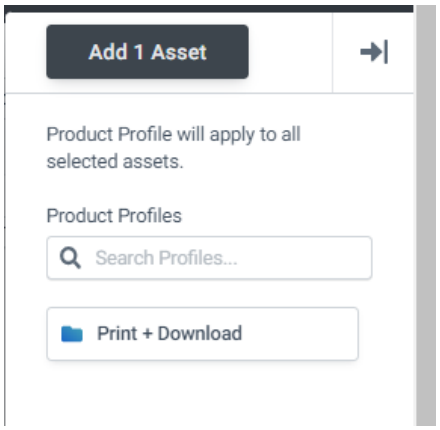
As a reminder, Product Profiles must be enabled and created in MarcomPortal Admin prior to syncing assets. Using Product Profiles requires an asset to be associated to a profile for the initial sync. Subsequent syncs do not require a profile.

To apply a Product Profile to single or multiple assets:

1. **Check on** the asset(s).
2. Click the button "**Add to MarcomPortal**" in the header or in the asset ellipsis menu.



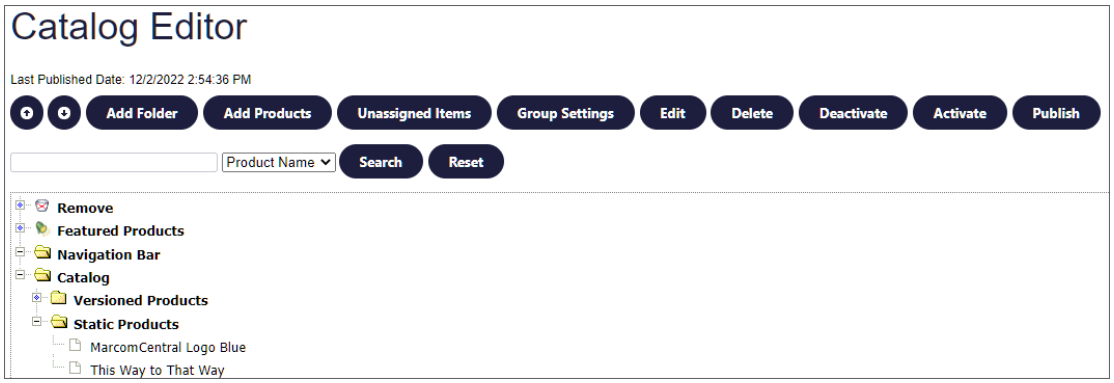
3. Select the Product Profile in the side panel to be applied to the product(s) when it is created in MarcomPortal
4. Click **Add <X> Asset** to sync the asset



To Publish Assets in MarcomPortal

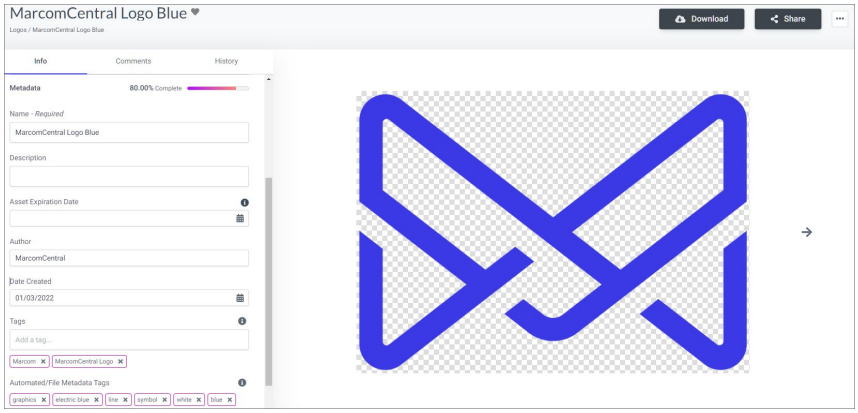
Once assets have been synced to the MarcomPortal Admin the assets will need to be added and published to the MarcomPortal Catalog. As of right now, asset Publishing is a manual process.

1. From the MarcomPortal Admin, **click the Catalog tile**.
2. Add assets to new or existing Catalog folders. Make sure to set and verify Group viewer permissions.
3. Click "**Activate**" and then "**Publish**". Publish will make the assets available to Portal Users.

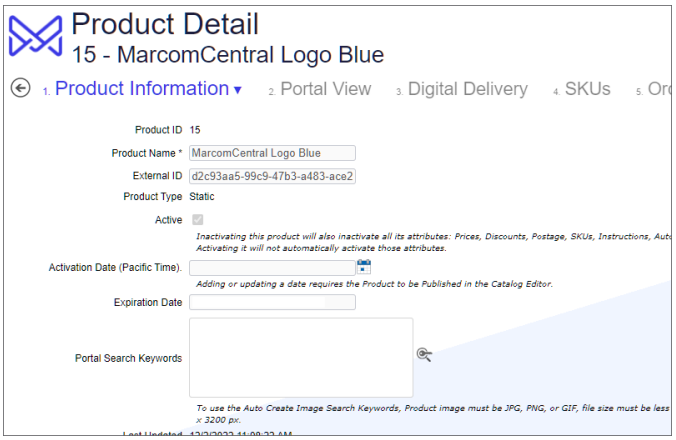


How to Manage Assets

Once assets are added, certain modifications can be made to those assets, in MarcomGather, that will sync with MarcomPortal Admin.



Note, all asset fields in MarcomPortal Admin will be non-editable and grayed out. Additional options like Req Only and Advance Search are not available at this time.



To Update Asset Name, Description, Tags, Etc.,

Updates to an asset can be made at any time and will automatically sync to your MarcomPortal. Updates include modifying or removing the asset name, description, and tags. To update an asset:

1. Click in the field.
2. Update the information.
3. Click out of the field. Once saved, the asset will sync changes with MarcomPortal Admin.

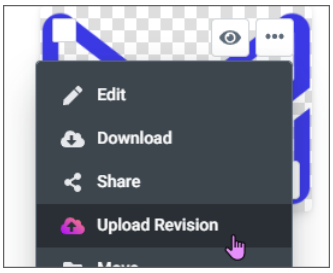
A toaster message will appear indicating the asset is being updated. Once complete, the changes will be visible in your MarcomPortal.

To Replace Assets (Upload Revision)

If a new version of an asset has been uploaded it will automatically sync to your MarcomPortal.

Note, the revision will update the permalink and any new information associated to the asset to your MarcomPortal. This includes name, description, and tags. To replace an asset:

Click the asset ellipsis menu | click **Upload Revision**.



A toaster message will appear indicating the asset is being updated. Once complete, the changes will be visible in your MarcomPortal.

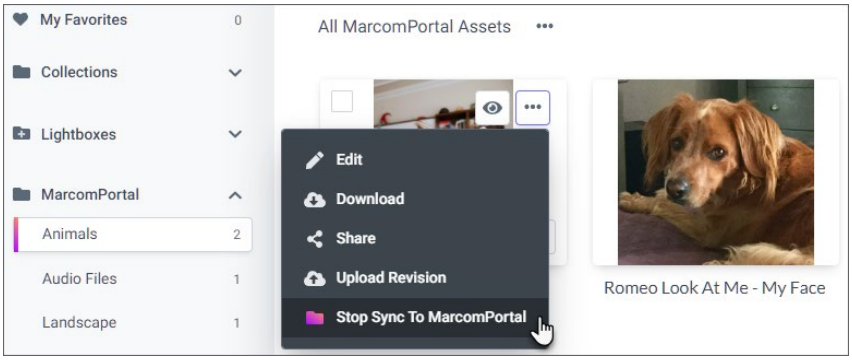
Note, the "Upload Revision" option is also available from the Edit page | ellipsis menu.

To Stop or Restart Asset Sync

Stop Sync

When the sync is stopped the asset will be deactivated from your MarcomPortal and removed from the MarcomPortal folder. Deactivating the MarcomPortal asset (Product) includes deactivating the SKU and, if published to the Portal, deactivating it from the Catalog. Only one asset at a time can be stopped / deactivated. To stop the sync:

1. From any asset thumbnail **click the ellipsis menu**.
2. Click "**Stop Sync To MarcomPortal**".



Once the sync has stopped, the ellipsis menu option will change back to "Add to MarcomPortal".

Restart Sync

If needed, an asset can be resynced to your MarcomPortal. The resync will reactivate your asset (Product) in the MarcomPortal Admin. This includes reactivating your asset SKU.

NOTE: It does NOT include republishing it to the Portal. Publishing will have to be done manually, through the MarcomPortal Admin. See To Publish Assets in MarcomPortal for more information.

To Delete Assets

Deleting an asset from MarcomGather will only deactivate the asset in your MarcomPortal as data is not deleted from MarcomPortal Admin.

To delete, **click the ellipsis menu** from any asset or click multiple assets and use the bulk header delete option.

If a deleted asset is reuploaded to your MarcomGather account AND is readded to the MarcomPortal workflow a new asset will be created in MarcomPortal Admin. See FAQ I uploaded a previously deleted asset, but now it looks like I have two assets in MarcomPortal Admin. Why? for more information.

What Information Transfers to MarcomPortal

MarcomGather Asset vs MarcomPortal Asset

The following MarcomGather attributes are used to create MarcomPortal assets.

MarcomGather Asset Attribute	MarcomPortal Asset/Product Attribute
Asset Name	Product Name
Asset System Generated ID	Product External ID Auto generated during initial sync.
Active Asset	Product Active
Last Modified	Last Updated
Asset Date Uploaded	Product Created Date
Asset Expiration Date	Expiration Date
Tags & Automated/File Metadata Tags	Portal Search Keywords
Asset Image / Thumbnail	Product Image (Thumbnail) *Note, some MarcomGather assets do not generate a thumbnail and will have an icon representing it. This icon is also the thumbnail used in your MarcomPortal asset. Examples include video files, audio files, and eps files.*
Asset Description	Product Description
--	Enable Digital Delivery (Download)
--	Digital Delivery Method (Download)
--	Supplier for Free Download Orders
Asset System Generated ID	SKU External ID
Asset File Name with Extension	SKU Name
Asset Description	SKU Description
Permalink	Downloadable File URL

MarcomGather Asset Attribute	MarcomPortal Asset/Product Attribute
Permalink	View Currently Saved Downloadable File
Active Asset	SKU Active

Error Tracking

MarcomGather Sync Error History Log

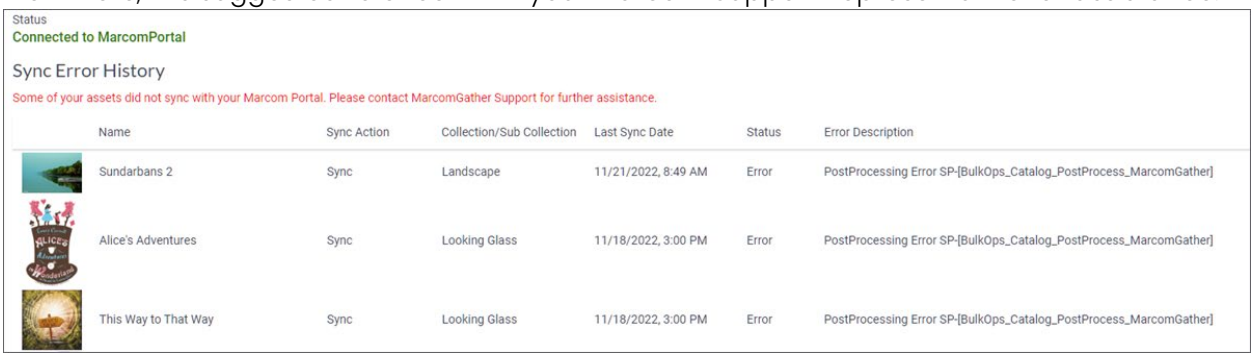
MarcomGather has an error log that displays issues with syncs.

1. From MarcomGather, **click the My Profile** icon | click Settings | click "**Integrations**".
2. **Click the ellipsis menu** next to the integration name and click "**Edit**".

Checking the error logs is a good place to start when encountering a sync issue. A typical "heads up" to go check is when the asset did not create/update in the MarcomPortal Admin and none of the success toaster messages popped-up.

If there are any errors they will show in a Sync Error History log. It can be one or many errors, but typically it will show the one error it hit when syncing assets.

From here, it is suggested to check with your Marcom Support Representative for assistance.


Status
Connected to MarcomPortal

Sync Error History

Some of your assets did not sync with your Marcom Portal. Please contact MarcomGather Support for further assistance.

	Name	Sync Action	Collection/Sub Collection	Last Sync Date	Status	Error Description
	Sundarbans 2	Sync	Landscape	11/21/2022, 8:49 AM	Error	PostProcessing Error SP-[BulkOps_Catalog_PostProcess_MarcomGather]
	Alice's Adventures	Sync	Looking Glass	11/18/2022, 3:00 PM	Error	PostProcessing Error SP-[BulkOps_Catalog_PostProcess_MarcomGather]
	This Way to That Way	Sync	Looking Glass	11/18/2022, 3:00 PM	Error	PostProcessing Error SP-[BulkOps_Catalog_PostProcess_MarcomGather]

If there are no error then the Sync Error History table will not show.

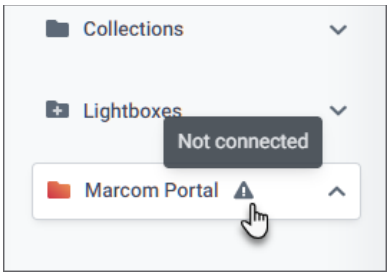
Error Troubleshooting Tips

The following are some errors that could occur and some possible solutions to help resolve them.

Connection Issue – "Not connected" MarcomPortal Folder Error

If there is an issue with the connector, the MarcomPortal folder will show with the error/warring icon. Hovering over the tooltip will indicate the "Not connected" status.

If connecting for the first time, the error could indicate the token was entered incorrectly. Try reentering the token. See section Inform Customer MarcomGather Account can be Configured for more information.



If this does not solve the issue, please contact your Marcom Support Representative.

"Stop Sync to MarcomPortal" Does Not Stop Sync and Creates Subsequent Assets in MarcomPortal Admin

Issue | Trying to stop an asset sync and a second asset is created in MarcomPortal Admin.

Possible Solution | Verify the External ID field is enabled for the MarcomPortal account. See section MarcomPortal Admin | Enable External ID Fields for more information.

For more information see "Stop Sync to MarcomPortal" Does Not Stop Sync | Verify External ID Field is Enabled | Known Issue.

Error Log Message Shows Something about "Payment method required"

Issue | MarcomGather error log displays message about payment method required.

Possible Solution | Make sure the setting for "Enable Payment Methods at the Product Level" is disabled for the Portal.

Enabling this setting causes an error, when an asset is created MarcomPortal, as a payment method will be expected and required. All assets created with MarcomGather are "Free Download" and this does not apply.

Error Log Message Shows Something about "Expiration date missing or is required"

Issue | MarcomGather error log displays message about expiration date missing or is required.

Possible Solution | Make sure the setting for "Expiration Date Required" is disabled for the Portal. Enabling causes an error, when an asset is created in your MarcomPortal, as not all MarcomGather assets will have an expiration date.

FAQs

Can Both Library and Create Asset integrations be used at the same time?

Yes, both the Library and Create Asset workflows can be used at the same time. Images used to sync with MarcomPortal Libraries will not interfere if those assets are also used with the Create Asset integration.

Will MarcomPortal assets sync back to MarcomGather?

No. The integration is designed to work one way which is from MarcomGather to MarcomPortal. Any updates made will need to be made in MarcomGather. MarcomGather is the "one source of truth".

What MarcomPortal asset fields can I edit after syncing?

Updates to MarcomGather asset name, description, or tags will sync back to MarcomPortal. See section To Update Asset Name, Description, Tags, Etc., (to be completed 12.15 release).

If the asset is an Upload Revision the new data and updated permalink will sync to MarcomPortal. See section To Replace Assets (Upload Revision) (to be completed 12.15 release).

Can I pick and choose which assets to add to my MarcomPortal?

Yes. You can select one or more assets and add them to your MarcomPortal. Not all assets have to be added to your MarcomPortal.

Can I add multiple SKUs to my MarcomPortal asset?

No. As of now, the integration is designed to create one SKU per asset. The SKU is a URL created from the MarcomGather permalink. As need increases the option to add more SKUs can become an option

Can I make my asset Digital Delivery & Print or Print Only?

Yes, you can use Product Profiles.

Is there a way to publish the asset to my MarcomPortal automatically?

No. As of now, assets will need to be manually published to your MarcomPortal.

If I make changes to assets in MarcomGather will I have to republish the assets in MarcomPortal Admin?

No, you will not have to republish changes. Updates will be available to Portal Users as soon as the asset has been saved and finished resynced.

I uploaded a previously deleted asset, but now it looks like I have two assets in MarcomPortal Admin. Why?

If an asset is deleted from MarcomGather it also deactivates the asset from MarcomPortal. If that same asset is then uploaded back to MarcomGather and added back to MarcomPortal a new asset will be created. It will *not* reactivate the previous asset.

Why? When an asset is uploaded to MarcomGather a unique External ID is generated. When an asset is deleted it removes the unique External ID. If the same asset is uploaded it generates a new unique External ID. The system does not recognize it as the same asset.