Brandfolder Guide

Guest Users

Ver 2 – 02, 07, 2025

Brandfolder

Quick Links

Searching

Downloading

Sharing

FARO®

Brandfolder is Corporate Marketing's Digital Asset Management (DAM) platform. As a Guest User this is where you will go to find all our approved, company-wide Marketing assets. This guide is to instruct you how to use Brandfolder to easily find, view, download and share assets on this platform.

As a Guest User, you can:

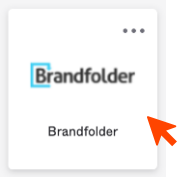
- View, download & share assets
- Change file type & size (width & height; maintaining aspect ratio)

What's included in this Guide:

- Logging In
- Account Settings
- Searching
  - Search Bar
  - Filtering
- Downloading
  - Downloading Individual Assets
    - Formatting & Sizing
    - Cropping
  - Downloading Assets in Bulk
- Boards
- Sharing
  - Sharing Individual Assets
  - Sharing Assets in Bulk

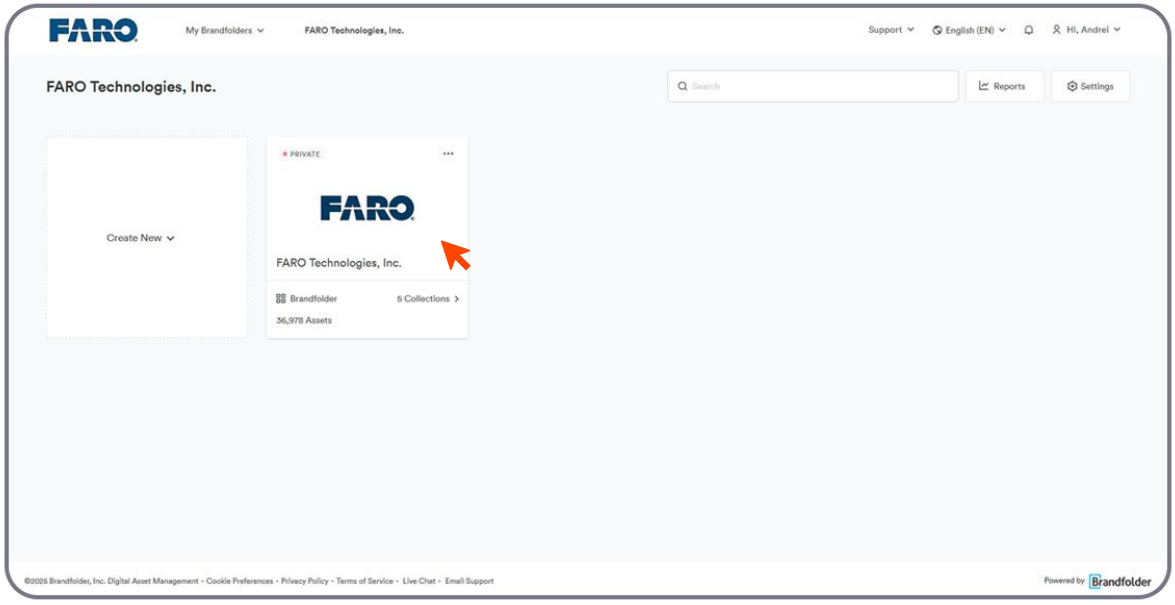
Logging In

To login to Brandfolder, sign into Okta SSO (Single Sign-on) and click on the Brandfolder App:

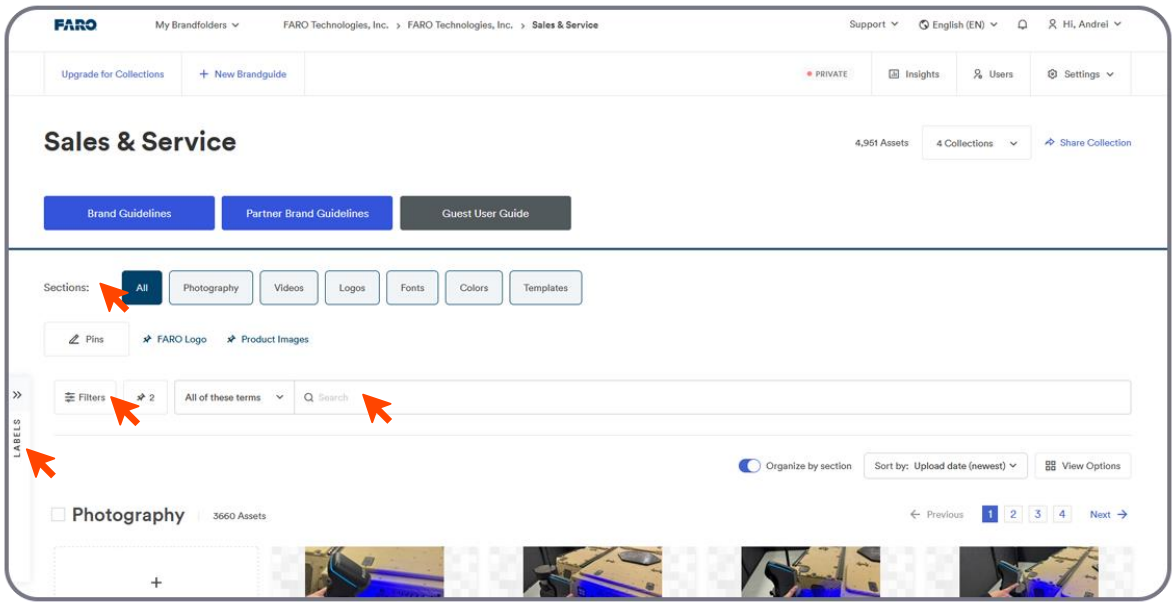


Once logged in you will be directed to a landing page that lists the Brandfolder Collections you have been assigned. Collections are assigned by the department you report to.

Click on the Collection tile to direct you to that Collection's dashboard.

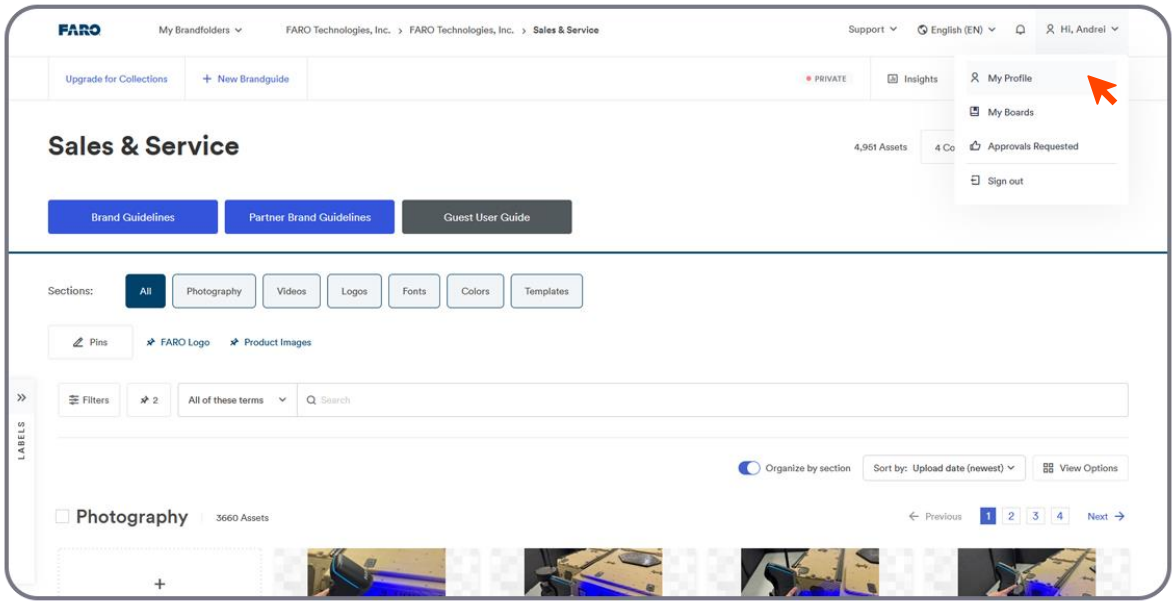


Once on the dashboard, you will see multiple ways to search and sort assets:

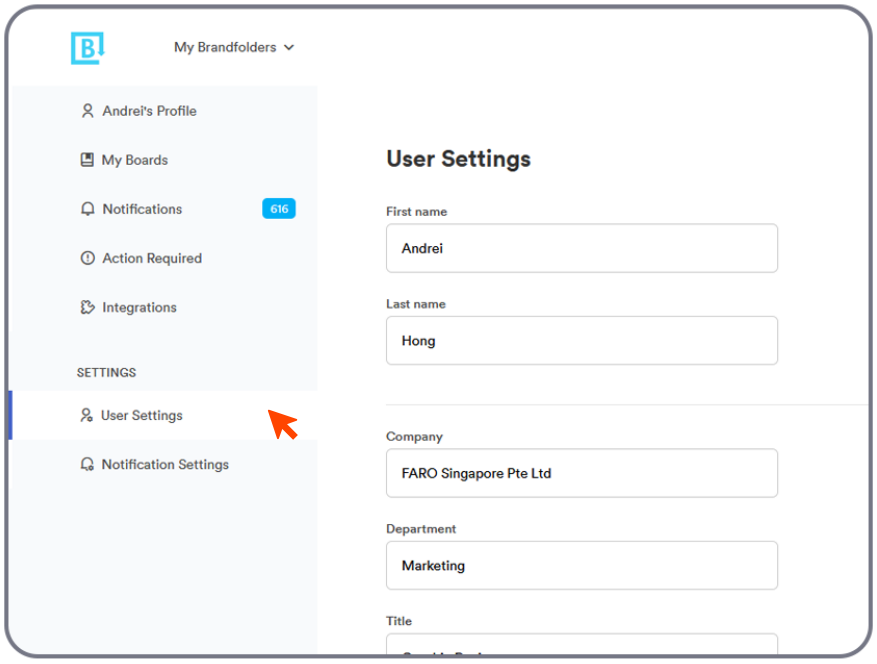


Account Settings

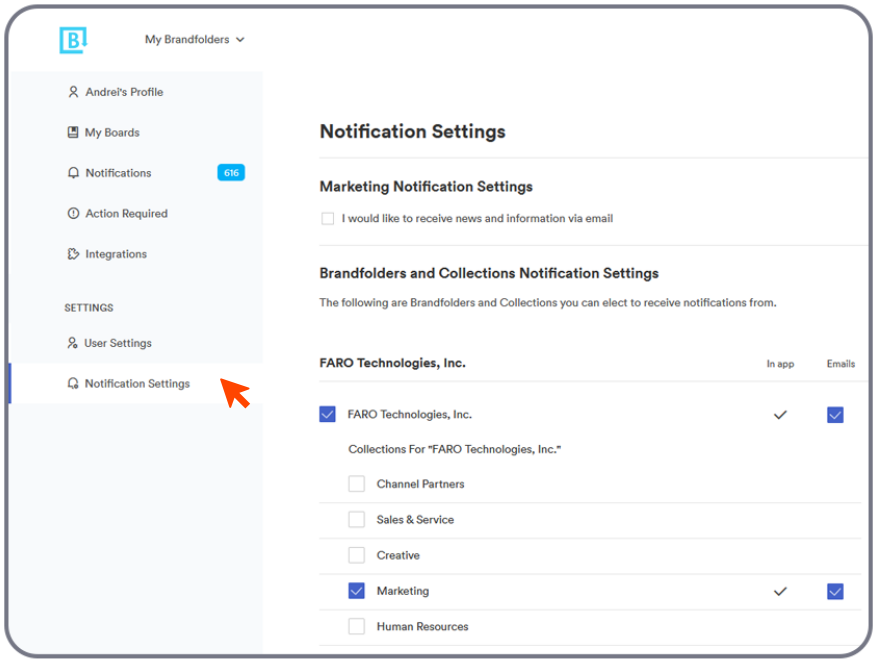
To update your individual preferences, go to **Hi, [Your Name] > My profile**.



Users can go to **User Settings** on the left pane and update their name, email, password, and company info.



Users can also select which Brandfolder or Collection that they would like to get notifications from. If notifications are enabled for a Brandfolder or Collection, users will receive in-app notifications and can receive them by email as well.

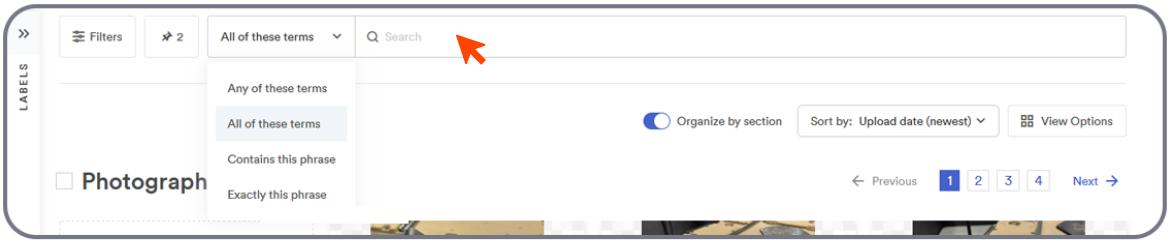


Searching

Search Bar

In the Search Bar, users can use four different options to help narrow down their search:

- Any of these terms
- All of these terms
- Contains this phrase



- **Any of these terms:** This search option covers all possibilities and offers great flexibility in finding results. It's especially helpful when users are not sure about the asset's name or tags. Even if just one term matches, the search will return the asset. For example, searching for "Quantum Max" will show any asset that has either "Quantum" or "Max" in its indexed fields.

- **All of these terms:** This option allows the user to be more precise in their search. For example, when searching for “Quantum Max”, the result will come back with any asset that has Quantum AND Max across any of its indexed fields. The two terms do not need to be part of the same field, but all terms do need to be present somewhere for an asset to match.

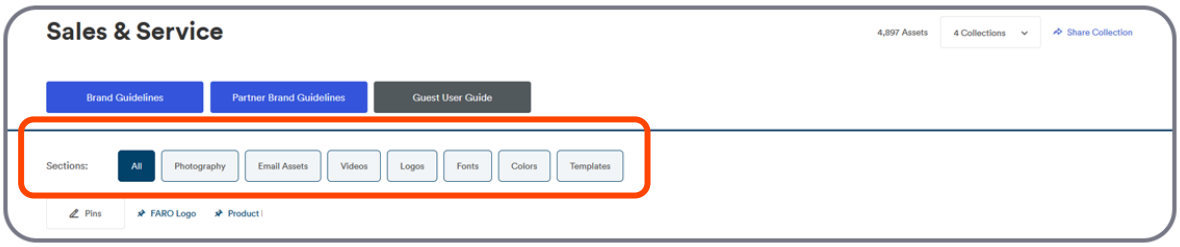
- **Contains this phrase:** This option is a great choice if the user knows part of an asset’s name or a bit of text in its description. For example, when searching Quantum Max using this phrase will pull in all assets that contain the phrase “Quantum Max”. An asset with the name of “LLP_XP_Probe_Quantum Max_FARO.psd” would be returned as the name contains “Quantum Max”. It will not return results where the terms are spread across multiple indexed fields.

Filtering

Users can also search for assets using filters with the following options:

- Sections
- Pins
- Labels
- View Options
- Organizing and Sorting

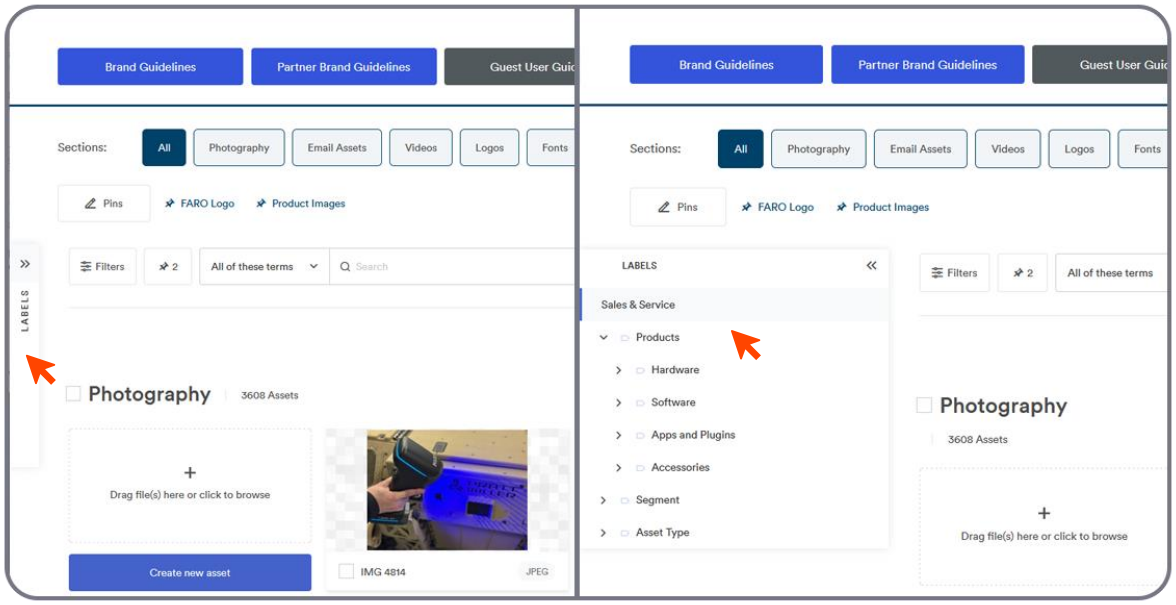
- **Sections:** Sections appear at the top of the page. This is the broadest way of filtering assets and is commonly used to separate assets by category, type, or purpose. Clicking on a Section's name will show users all the assets within the Section.



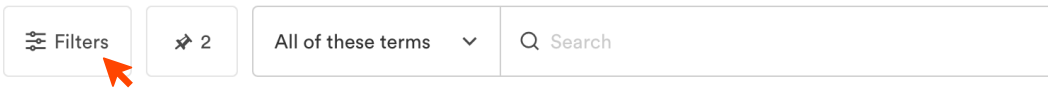
Note: *Corporate Marketing will continually be optimizing Brandfolder, as new Sections become available, they will show up as a Section option here.*

- **Pins:** Pins are located above the search bar. They are created to highlight frequently used search terms. Administrators will feature the most relevant Pins below the Sections.

- **Labels:** Labels are located on the left-hand side of the screen that users are in. Users can *open the Labels drawer by clicking the two-arrow icon*. Users can view Sub-Labels by clicking on the top-level Label. Additionally, users can use Pins or Sections in tandem with Labels. For example, if the user first clicks a Pin and then browses Labels, the user will notice more refined results.

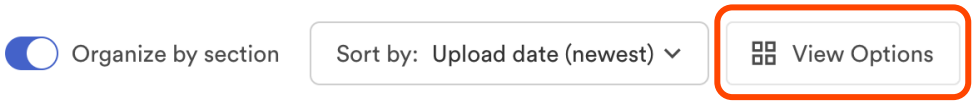


- **Advanced Filters:** Clicking the Filters button next to the Search Bar will open the Advanced Filters drawer which can be used to search by Tags, File Types, Custom Fields, Orientation, SKU Search, or Upload Date. Users can also combine multiple filters to further narrow their search results. To clear the search results, users can use the Clear button at the top of the Advanced Filters Drawer.

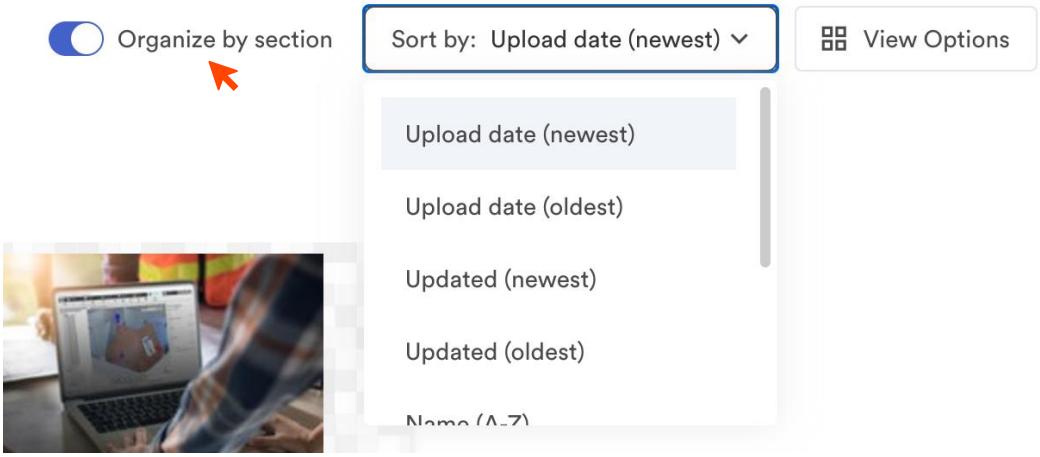


Note: *If all search functions cannot be seen, please refresh the page.*

- **View Options:** Clicking View Options will allow users to change their preferred view of Brandfolder (Layout, Assets per section, Show custom Fields and Asset Info)



- **Organizing and Sorting:** Using the *Organize by section* toggle will change whether Search results are divided by Section or displayed as one group. The Sort by dropdown allows users to choose from many options such as (Creation date, Upload date, Updated, Name or Popularity)



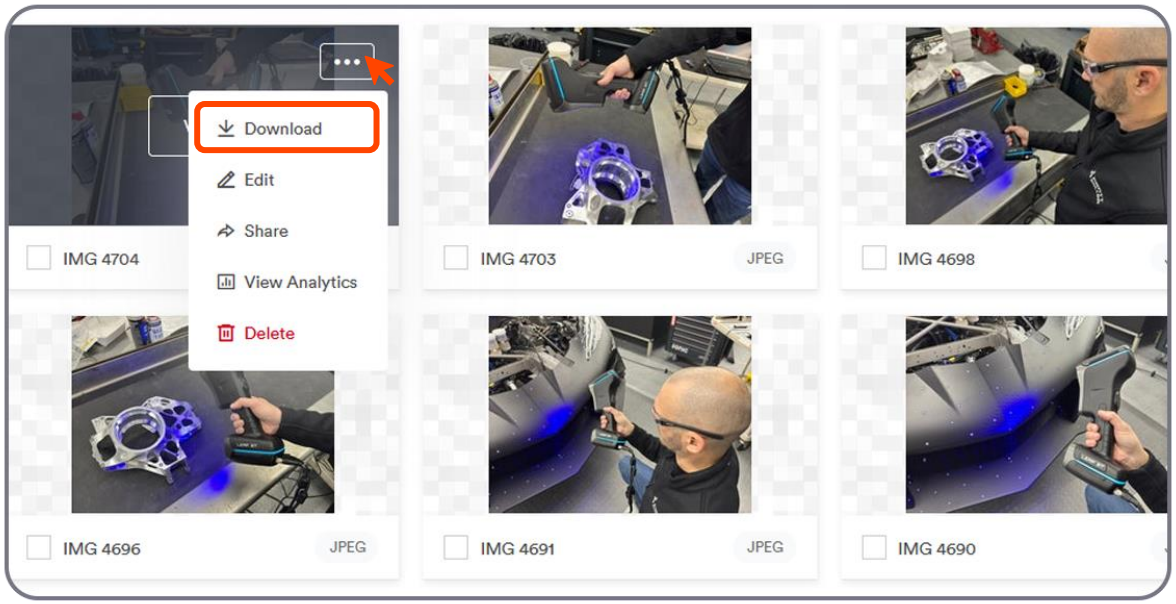
Downloading

Downloading Individual Assets

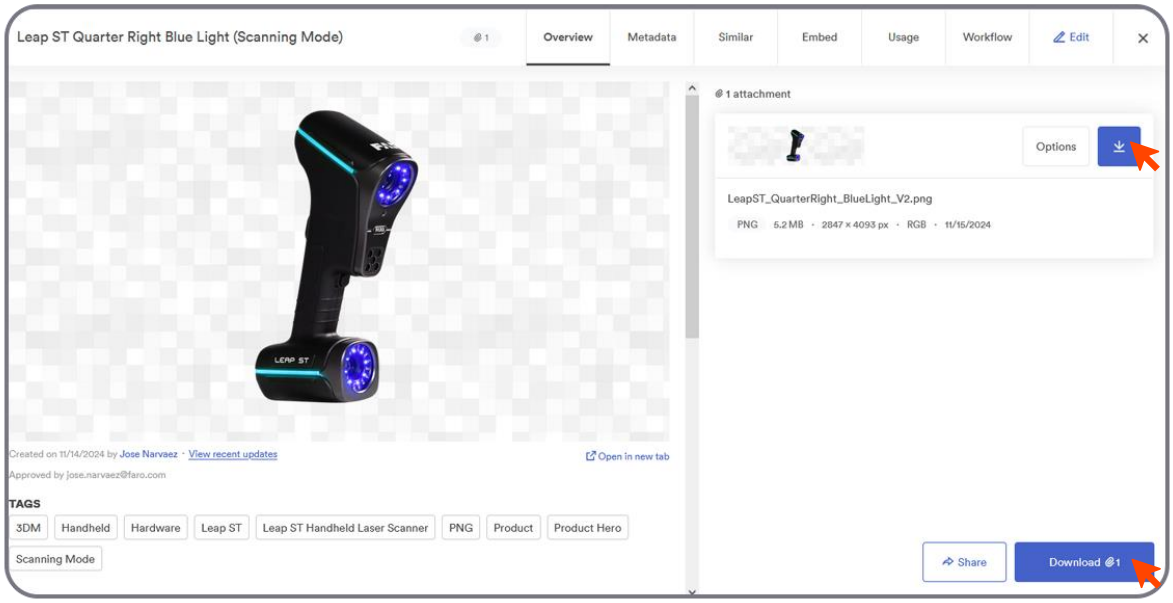
There are multiple ways to download an individual asset or attachment from within Brandfolder:

- Downloading from the Brandfolder view
- Downloading from the Asset Module
- Formatting and Resizing
- Cropping

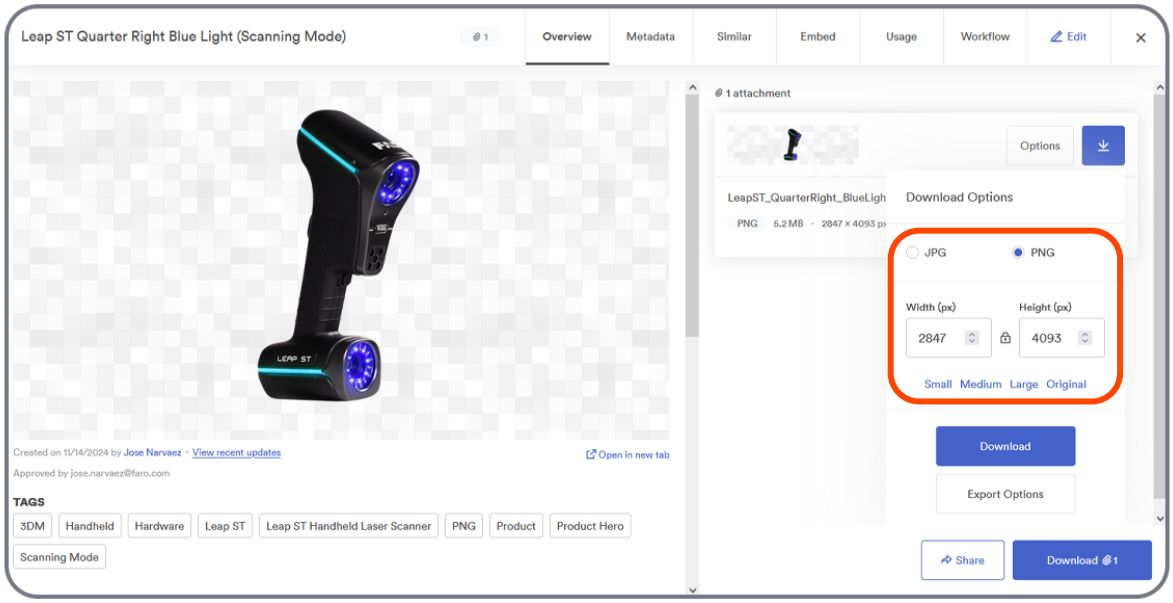
- **Downloading from the Brandfolder view:** When viewing Brandfolder, users can download individual assets by hovering over the asset and clicking the ellipses. *From the dropdown menu select Download.* If a file has multiple attachments – noted by the attachment count in the bottom right-hand corner of the tile – downloading from the Brandfolder view will download a ZIP file with all the merged attachments.



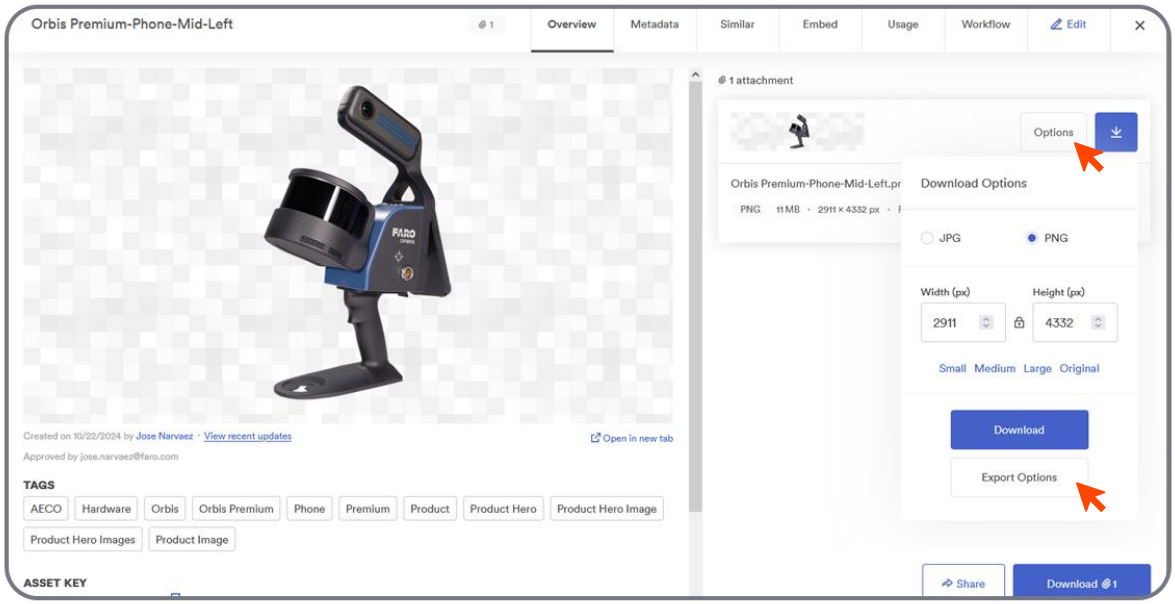
- **Downloading from the Asset View:** To enter the Asset's View, Click directly on the asset. When users are viewing an asset, they can choose to download all the attachments within the asset or an individual attachment. To download all attachments, select the Download button in the bottom right-hand corner. To download an individual attachment, select the download icon from the attachment list.



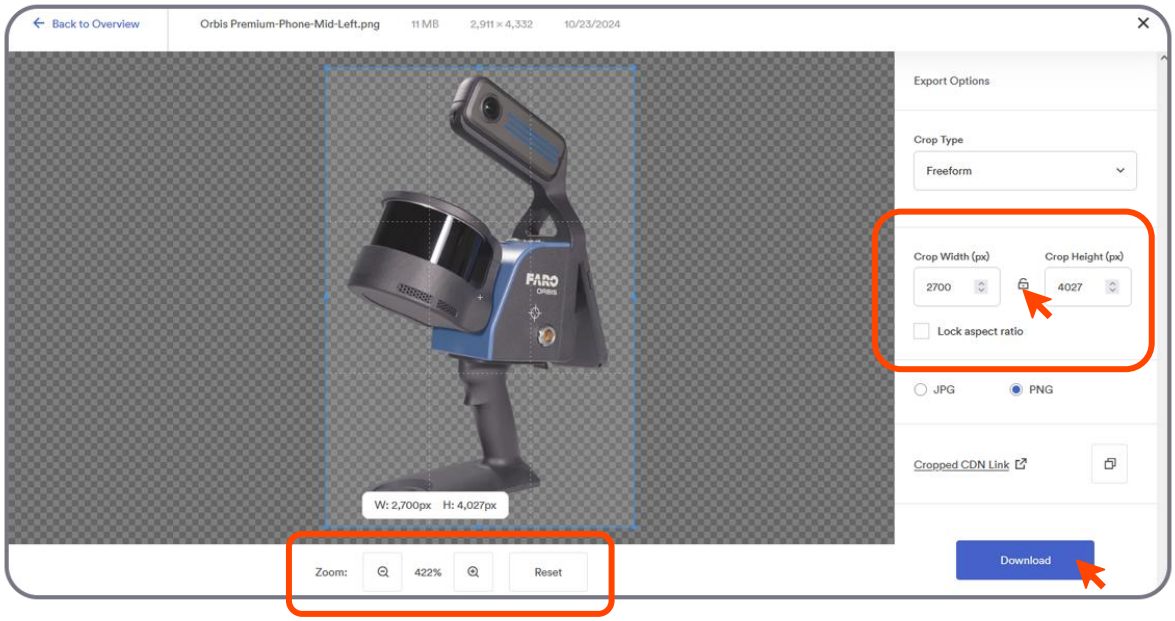
- **Formatting and Resizing:** To change the format or size of an image click on Options to the left of the attachment download icon. This will open a menu to select the desired file type and size options. Note that Brandfolder will always respect the original aspect ratio. when entering a width or height, the other will update automatically.



- **Cropping:** To crop an image click on the Options button to the left of the attachment download icon. From the menu drop-down screen, click the bottom *Export Options button*.



To crop proportionally click the lock icon closed and type in desired height or width. If wanting a different size, leave the lock icon unclicked and type in your desired height and width. From there you can position the image in your cropping and/or zoom in or out. Choose your file type and click Download at the bottom of the menu.

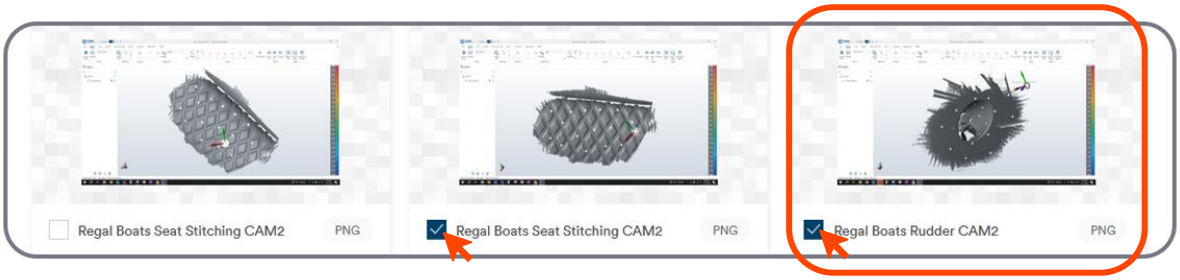


Downloading Assets in Bulk

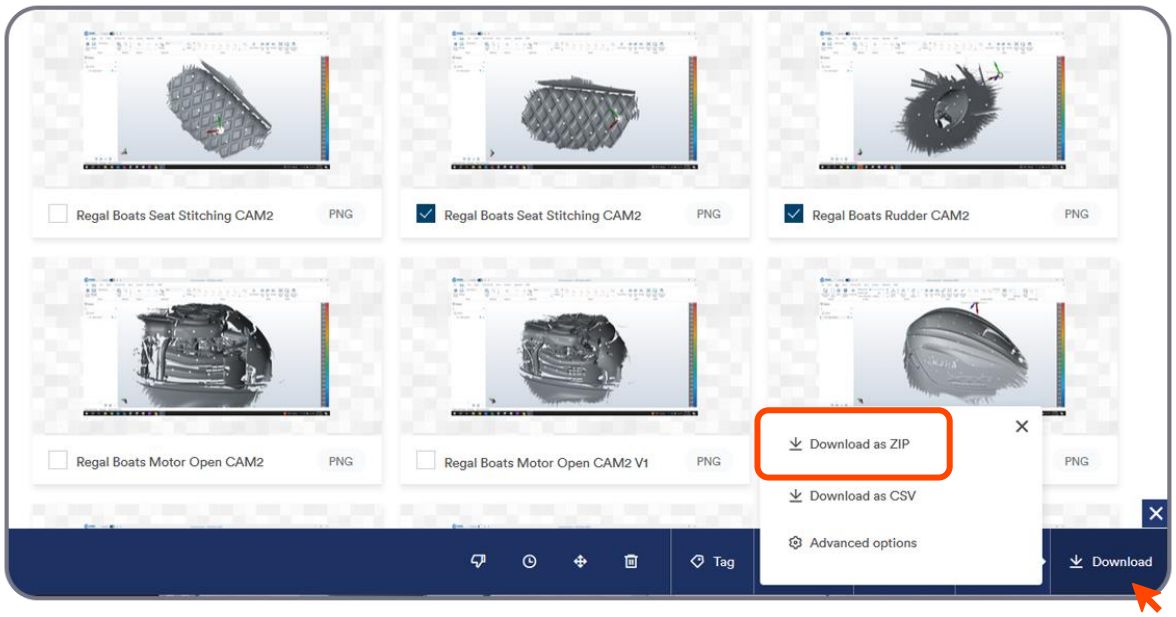
There are multiple ways to download assets in bulk:

- Bulk Management Toolbar
- Downloading Options

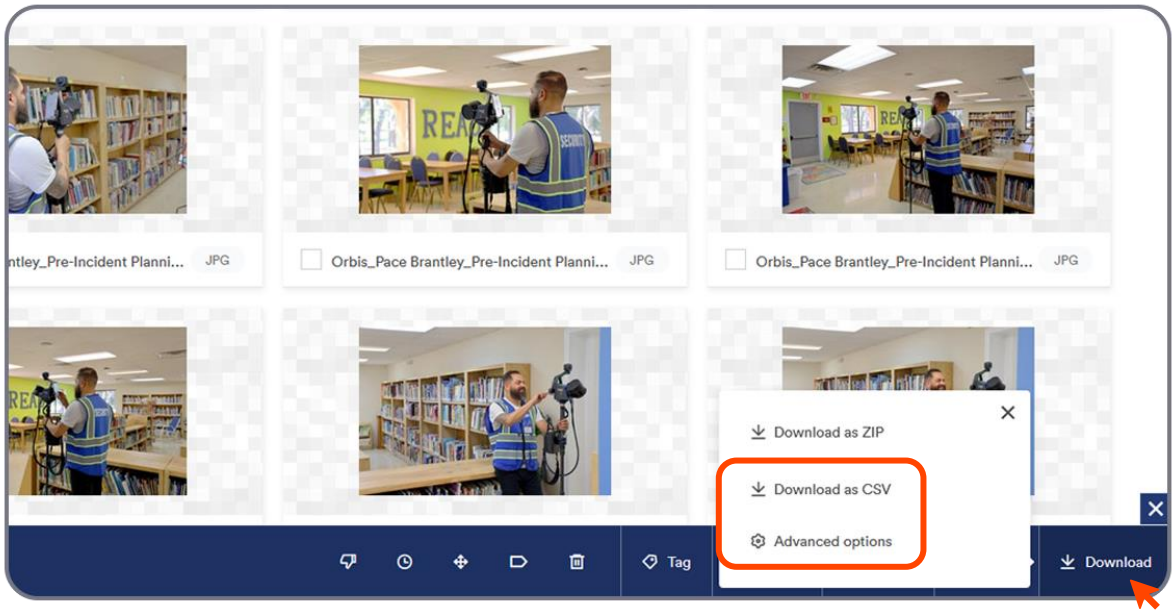
- **Bulk Management Toolbar:** Select assets individually by selecting the checkbox in the bottom left-hand corner of the asset tile. Select entire sections by checking the box next to the section name.



A drop-up will appear when the Download option is clicked in the Bulk Management Toolbar. Once all the desired assets are selected, select *Download as ZIP* from the blue Bulk Management Toolbar. This will download a ZIP file with all the selected assets.



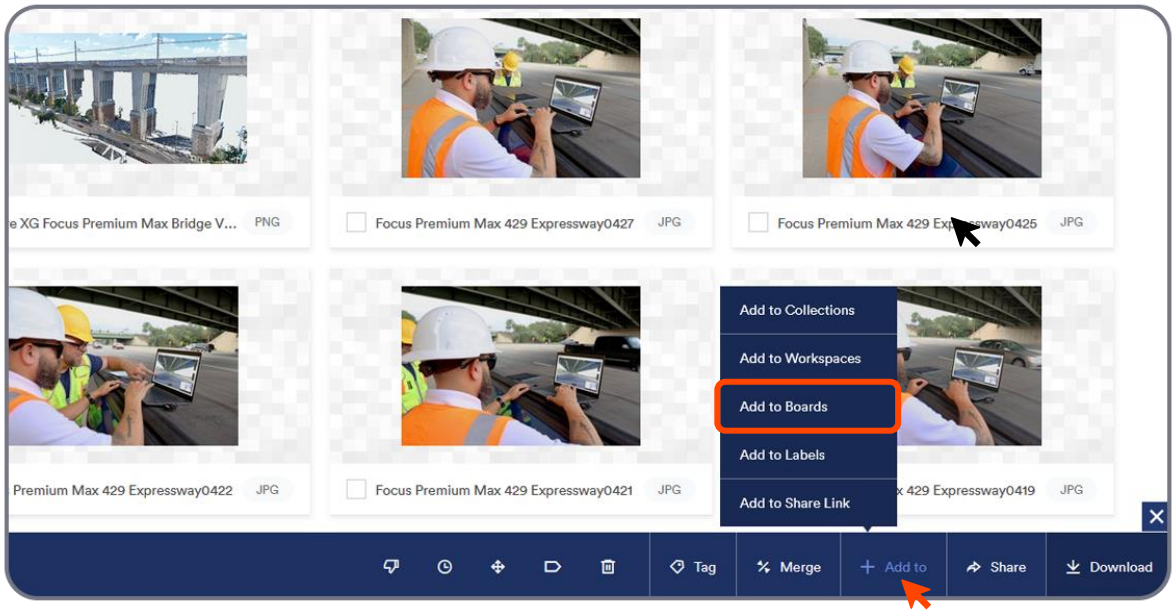
- **Downloading Options:** Selecting *Download as CSV* will prepare a download of a metasheet containing critical asset information such as; The asset name, description, tags, etc. Selecting *Advanced options* will bring up the Bulk Download & Sharing Module which can be seen below. From this Module, users can choose specific assets or attachments to be included in their download.



Boards

Boards can be used to create a cultivated view of user-specific assets. To add an asset to a board, start by selecting the asset(s) and clicking *Add to Boards* in the bottom bulk actions bar. The assets will populate in the My Boards tab so users will have easy access to their top collateral such as popular photos or commonly used logos. A new Board can also be created without adding assets by clicking + Create Board by navigating to the top right, selecting your name and then My Boards.

Note: *Boards can't be shared with other users, they are only for personal use.*



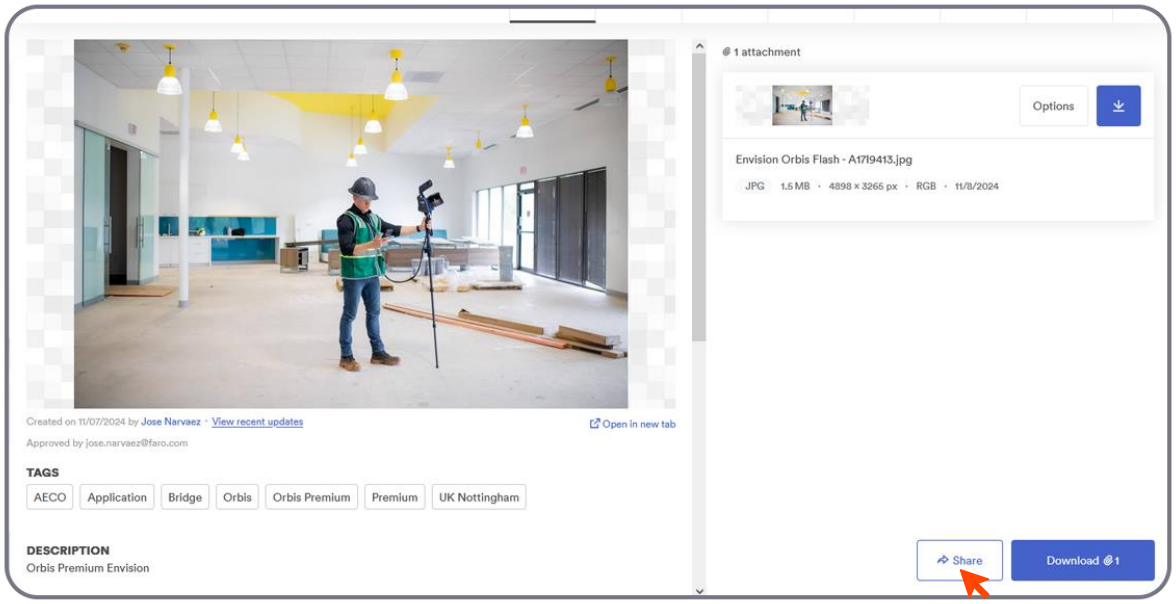
Sharing

Sharing Individual Assets

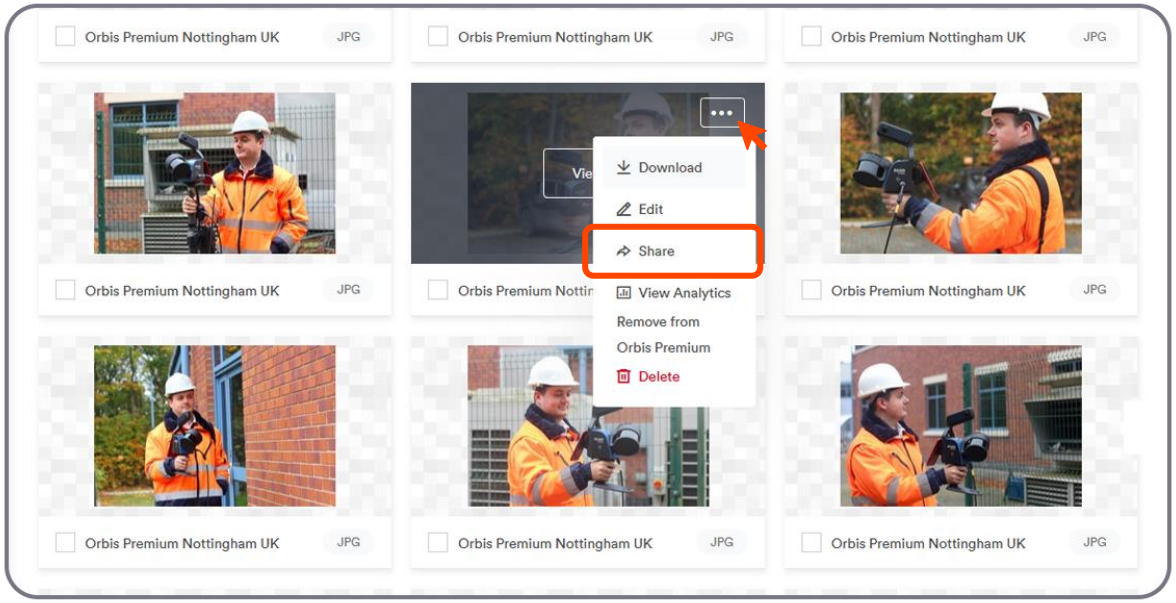
There are multiple ways to share an individual asset:

- Sharing from the Asset Module
- Sharing from the Collection

- **Sharing from the Asset Module:** Open the Asset Module for the asset that would like to be shared and click the Share option in the bottom right-hand corner.



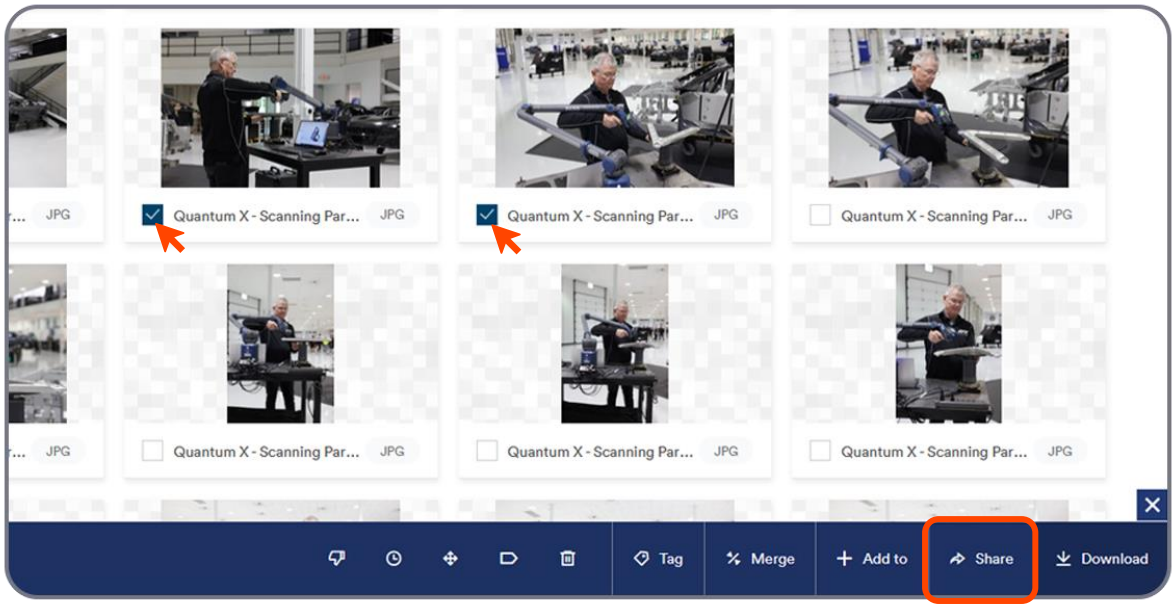
- **Sharing from the Brandfolder or Collection:** The second option to share an individual asset is available from the Collection level. Hover over the asset and click on the ellipses in the upper right-hand corner, click the Share option from the dropdown menu.



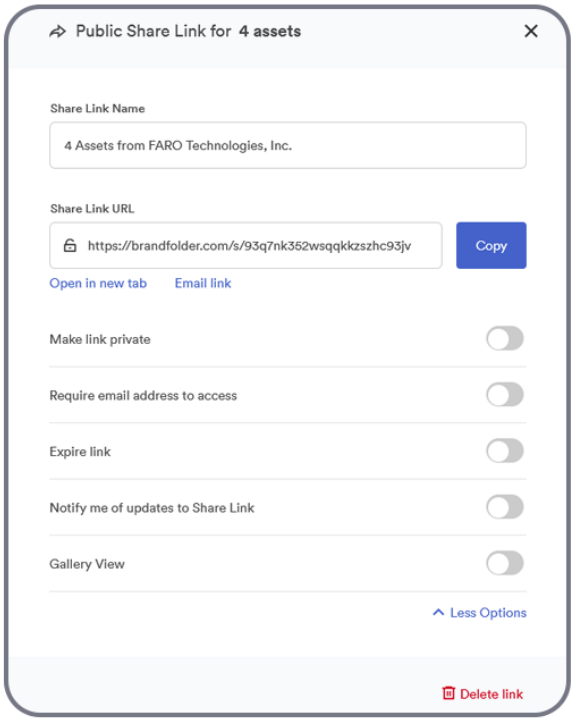
Sharing Assets in Bulk

Assets can be shared in Bulk using the Share Link feature.

Within the Asset Module the desired assets must be selected using the checkboxes on the asset tiles. Once the assets are selected, users will see the blue Bulk Management Toolbar at the bottom of their page. From this toolbar select the Share option (it is always helpful to note the number of assets selected in the bottom left-hand corner).



Once the asset(s) have been selected, a new share window will appear with a few customizable options.



- **Share Link Name:** Here you can name the links according to assets / purpose.
- **Public Share Link:** Anyone with the link will be able to download. (Please read note below when it comes to sharing assets publicly.)
- **Make link private:** Only users with a Brandfolder login or Simple Password (when enabled) will be able to see shared assets. This will hide the *Require email address to access* option. Toggling on the private option will also work for sharing assets internally (among Brandfolder users).
- **Disable download functionality (view only mode):** Users will only be able to view content within the Share Link, they cannot download or share assets. View only allows Guests to request access to download the files.
- **Expire link:** Users can set an expiration date for their Share Link. After the expiration date has passed the link will be inaccessible.
- **Notify me of updates to Share Link:** Notifications will alert the share link Creator when someone has viewed the share link or downloaded assets from the share link. These notifications are sent to the Creator through the Brandfolder notification center and via email. Notification center updates are real-time based on the share link activity. Email notifications will be sent out on an hourly basis.
- **Enable Gallery View:** With Gallery View, extra information like sections, asset name, and asset details will not display. Instead, all the attachments will simply appear and if users' share link allows downloads, they can hover over the asset and select the download button. If the share link is private the users will not be able to enable gallery view. Users also have the option to upload a logo which will appear at the top of a gallery view share link.

Note: Please ensure that the assets are shared responsibly and only with trusted individuals. It is important to confirm that the recipient understands and respects the proper use of the assets, avoiding any misuse or actions that go against the intended purpose or puts FARO at risk.