Workflow

Manage the complete file delivery pipeline for your DAM site — from incoming uploads through processing rules to outbound distribution. For an agency like ACME Creative Agency, this is where photographer feeds, processing steps, and client delivery destinations all connect.

Key Features

- **FTP In**: Manage the FTP accounts that receive incoming files from photographers, agencies, or automated feeds. Each user is assigned an action type — Process, List, or Archive — that controls how their uploads are handled.
- **Rules on an FTP In login**: The Rules button on a login's row sets what happens by itself to every file that login delivers: captions and credits from one of your IPTC templates, a line added under each caption, renaming with your unique number, and where the file goes next (wait in Incoming, go to an approval pool, or publish into a catalog). A rule can also **send a copy** of each delivered file to one or more FTP Out destinations, for example your office's own photo inbox: the copy is a new file, turned upright (or, with "Turn photos upright" switched off, with its orientation left as the photographer delivered it), with the template and caption line you choose for it, so the photographer's original is never changed. A copy can also carry the caption, credit and copyright lines your previous system applied for that photographer, in the same order and with the same result; step 4 of the Rules window lists them, and saving the window keeps them. A rule can also **fill the location, headline and keywords from the caption** (city, state, country, a headline and keywords, written the way your account already writes them, only where the photo has none; and the special instructions line with the story's name when your stories already carry one), give the login its **own name format** (for example the shoot date, a short code from the main person's surname and your unique number: 20261010SMI_0000012345.jpg), and publish **one story per set** with the story name {set}: every event the photographer covers gets its own story, titled with its headline. Files from the same delivery folder that were taken the same day in the same city go into the same story, and its code comes from the person most of them name; a later delivery joins that story only for photos of the same day and city, within three days. A file whose caption is not written the usual agency way, names no person, or names its main person in a way that does not read as a name, waits in Incoming, flagged, so nothing is guessed. If that catalog already has a story with the same name (the same day and the same code) for a different event, the new files wait in Incoming, flagged, so two events are never mixed; photos of the same event join that story, whoever delivered them. A photo already in your library is recognized and uses no new number.
- **FTP Out**: Configure remote servers where processed files are sent after passing through your pipeline. Each destination shows its host, login, priority, type, and error count. Toggle

Active, Off, or Stopped without deleting the configuration.

- **Distribution Lists**: Define routing rules that link incoming FTP sources to outgoing destinations, with optional delivery delays and photo/video filtering.
- **Processing Rules**: Set up automatic actions applied to incoming files — rename templates, auto-rotation, auto-balance, folder organization, and asset classification per FTP source.
- **Web In**: Connect web upload portals to specific catalogs, so files submitted via browser are routed correctly. Monitor the error count column to catch failed ingestions.
- **Queue**: Monitor all outbound delivery tasks in real time. Color-coded status badges — Pending, Processing, Done, and Error — give you an instant read on what's moving and what needs attention.

How to Use

1. Select your DAM site from the topbar to load your workflow configuration.
2. Use the sub-tabs at the top of the Workflow page to navigate between sections.
3. In **FTP In**, click **New FTP User** to add an incoming feed. Use the Action filter to view users by routing type (Process, List, or Archive).
4. In **FTP Out**, click **New Destination** to add a remote server. Use the toggle icon on any row to enable or disable a destination without deleting it.
5. In **Distribution Lists**, click **New List** to map a source FTP user to an outbound destination. Set a delay (in days) and choose whether the list handles photos, videos, or both.
6. In **Processing Rules**, assign rename templates, rotation, auto-balance, and folder handling for each incoming FTP source.
7. In **Web In**, connect a web upload source to a catalog and monitor error counts for failed ingestions.
8. In **Queue**, use the status filter to focus on errors or pending transfers and track delivery progress in real time.

Tips

- A delivery pipeline typically follows this order: **FTP In → Processing Rules → Distribution List → FTP Out**.
- Disabling an FTP Out destination (rather than deleting it) lets you pause delivery without losing configuration — useful when a client destination is temporarily unavailable.
- Only a destination that accepts automatic sending can receive a rule's copy. A destination set to "on demand" receives only what a person sends, which keeps client destinations safe from anything sent by itself.

- Check the **Queue** regularly — items stuck in "Error" status indicate a connection or permission issue on the destination server.
- Distribution Lists support a delay in days, useful when you need to embargo content before it reaches its destination.
- Processing Rules can keep the original folder structure or flatten it — use "Keep Folder" when your destination expects a specific directory layout.