

Harmoni Assets

Harmoni's ASSETS provides a secure, centralized location for users to store files. With ASSETS, Harmoni users can:

- Upload and download files into ASSETS
- Provide access to files via a link or through a dashboard page

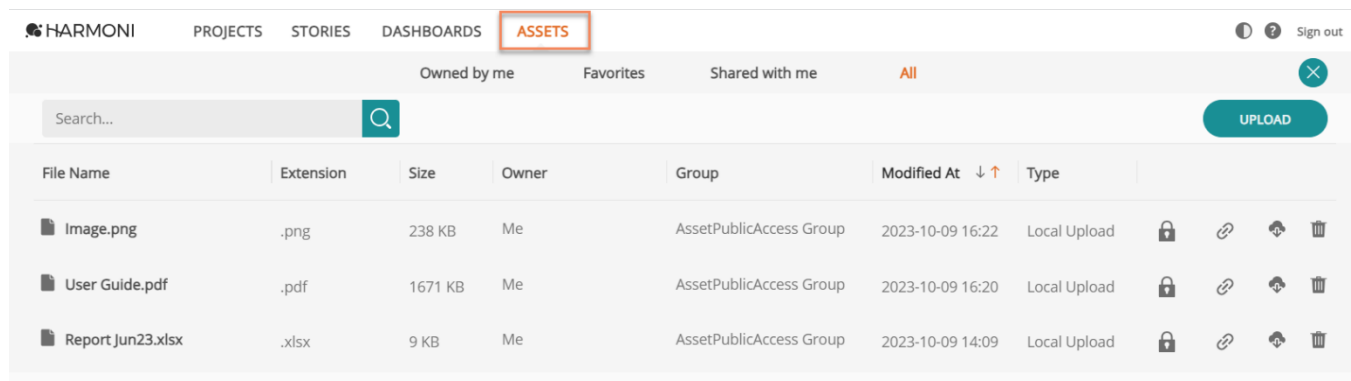
Files are stored securely within your site and group, ensuring access is only available to valid Harmoni users.

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1. Access to ASSETS

Access to the ASSETS is provided via personalization keys. Once the key is on, the ASSETS menu is available in the Global Menu Bar.



Additional personalization keys control default settings, including:

Personalization Keys	Default Setting	Options
Maximum file size	500MB	Increase/decrease to required size
Accepted File Formats/Types	Excel and CSV	Add required file type
Enable/Disable Upload	Upload enabled for all	Limit/turn off upload
Enable/Disable Download	Download enabled for all	Limit/turn off download

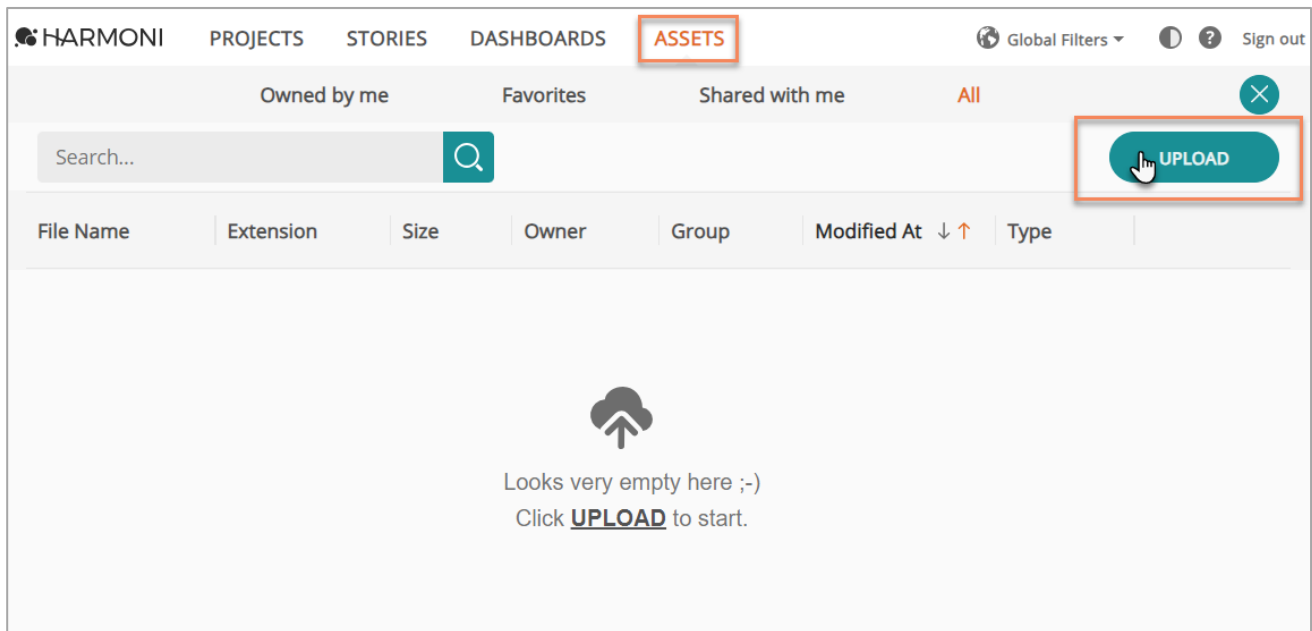
ASSETS supports many file formats, including the following options:

- **Files** (.docx, .xlsx, .pptx, .pdf)
- **Images** (.jpg, .svg, .png)
- **Videos** (.mp4)
- **Fonts** (all font file types)

2. ASSETS Functionality

Upload a File

To upload a file into ASSETS, click on the upload button.

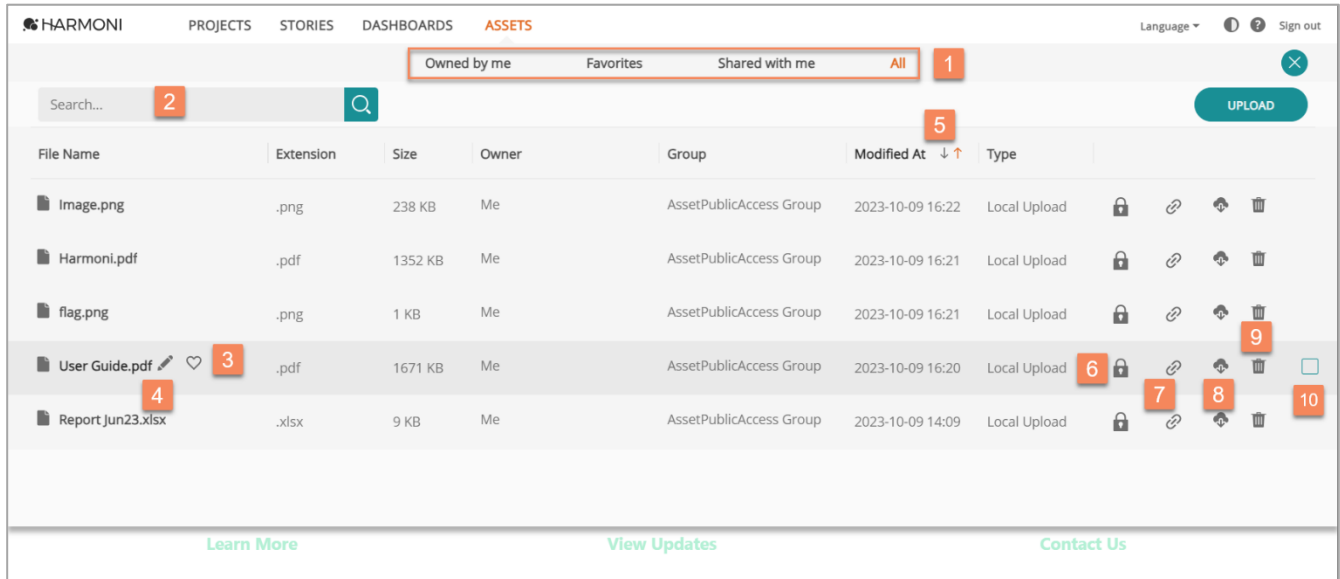


- Select the ASSETS menu
- Click the UPLOAD button in the right-hand corner of the Harmoni screen
- From the dialog box, navigate to and select the file(s)
- Click Open
- Once the upload completes, click the OK button, and the Assets folder updates

File Management Options

After you have uploaded files to Assets, there are various options available.

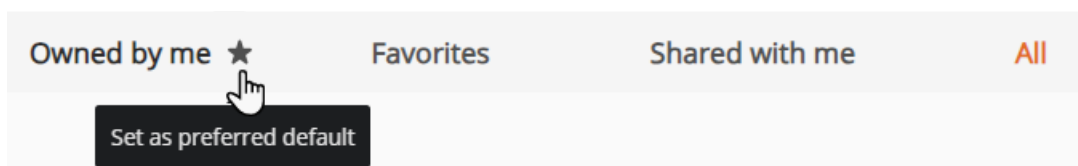
1. [Filter the files using the Display Filter option](#)
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1. Filter using the Display Filter

Use the tile display filter to show only/all files based on ownership, favorite, or shared states. Select All to show all files.

Click the star next to any of the filters to mark as a default. When you access ASSETS, the default filter will be active.

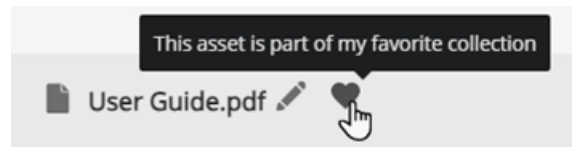


2. Search

You can use the search bar to find specific files. As you type, the list of file names will shrink to match the text you enter.

3. Mark as a Favorite

To favorite a file, simply hover over its name and the heart option will appear. Click on the heart to mark it as a favorite.



4. Edit the file name

After uploading a file, you can still modify its name. Click on the edit pen to access the name, then hit enter or click outside the edit box to confirm the change. Please note that you can only edit the names of files that you own.

5. Sort the files

Files are automatically sorted by most recent in the **Modified At** column. Click the arrow icon next to the column header to reverse the order.

To sort by your preferred field, simply hover over any column header and an arrow icon will appear. Click the arrow icon a second time to reverse the sorting order.

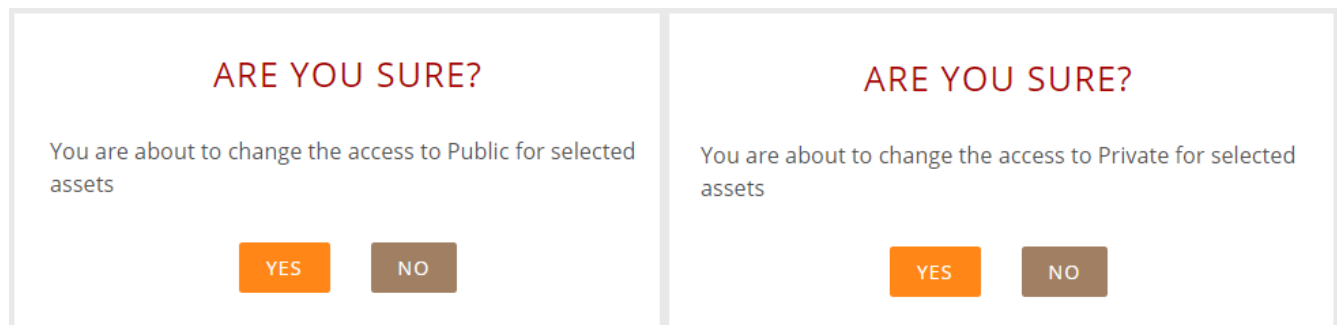
HARMONI PROJECTS STORIES DASHBOARDS ASSETS Global Filters Language Sign out									
Owned by me Favorites Shared with me All									
Search... UPLOAD									
File Name	Extension	Size	Owner	Group	Modified At	Type			
All Users-Guide.pdf	.pdf	1352 KB	Me	Harmoni Knowledge Bas...	2023-10-25 12:08	Local Upload			
flag.png	.png	1 KB	Rachelle Chapman_Explo...	Harmoni Knowledge Bas...	2023-10-24 16:05	Local Upload			
How to video.mp4	.mp4	986 KB	Me	Harmoni Knowledge Bas...	2023-08-04 12:39	Local Upload			
image for landing ...	.png	238 KB	Me	Harmoni Knowledge Bas...	2023-08-21 17:03	Local Upload			
PPT Template.pptx	.pptx	634 KB	Me	Harmoni Knowledge Bas...	2023-08-09 12:43	Local Upload			
User Guide.pdf	.pdf	1671 KB	Me	Harmoni Knowledge Bas...	2023-08-04 13:07	Local Upload			

6. Control access to the files (Lock/Unlock)

When you first upload a file to assets, the lock icon is locked , which means only those users who are in the same Harmoni group as you can access it, either directly in the Assets tab or via a link you send or include in a dashboard. Locked files are private.

If you need all users who are on the Harmoni site, irrespective of the group they are in to access the asset, then you can click the lock icon to unlock it  and provide public access.

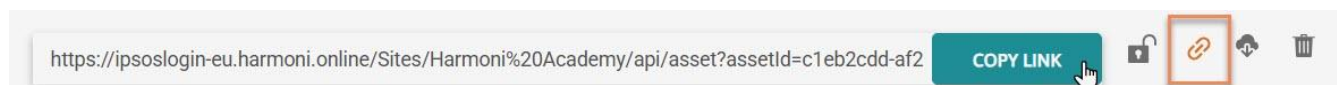
The icon toggles between locked and unlocked. A popup box alerts you to the changing state.



7. Copy a file link

Click the link icon  to generate a link, then click the **COPY LINK** option to copy it. You can then paste the link into an email to share with others or use it in a dashboard.

Note that other users are not required to have access to ASSETS (i.e., see the ASSETS menu) to be able to view the file via a link.



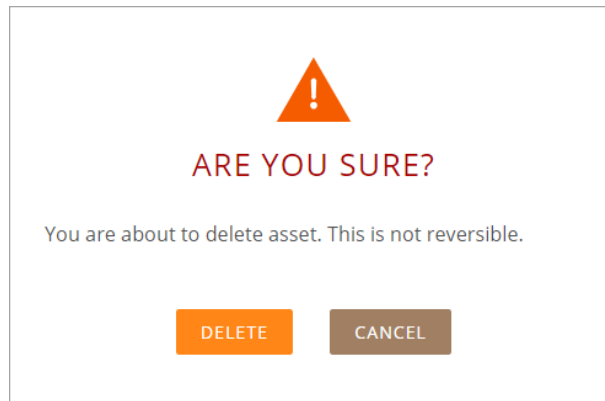
8. Download a file

Use the download icon  to download a file. Once you click on the file, the download will begin and can be found in your computer's downloads folder.

Once a file is downloaded, the download icon turns green . This does not prevent you from downloading the file again if you need.

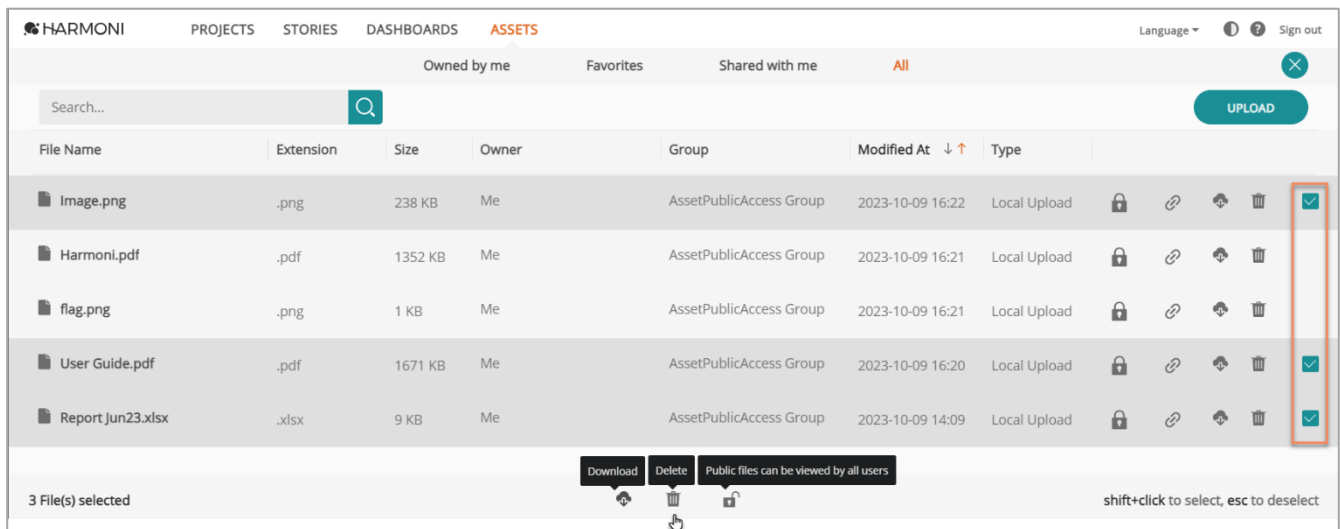
9. Delete a file

Use the trash can icon  to delete a file. Harmoni asks for confirmation prior to deleting the file. You can only delete a file you own.



10. Check box option

Hovering over the file reveals the check box option . You can tick multiple check boxes and then download, delete or lock/unlock multiple items at once. With multiple items selected, the options to download, delete or lock/unlock are at the center, bottom of the asset list.



Click the text boxes individually or you can make multiple selections at once. To do this...

1. Select the first check box.
2. Hold the **shift** key down and **click** a check box further down the list.
3. All check boxes in-between are also selected.
4. Press the Esc button to deselect multiple files at once.

Tips:

- If you select a mixture of locked and unlocked files, Harmoni will default to locking all selected files, so they are private.
- You can only delete or lock/unlock files you own unless you are an administrator.
- When you download multiple assets at once, Harmoni includes them all in a zip file.

3. Link to a Dashboard

Storing files in ASSETS makes it easy to manage assets to use in your dashboards. Load the necessary files into ASSETS and use the link option to copy the link and connect it to your dashboard.



Only users in the *same* Harmoni group as you have access to the assets that are locked.
When building a dashboard, if users from other groups are accessing it, make sure you unlock all required files.

Linking files stored in ASSETS to Dashboards requires knowledge of creating and designing Harmoni Dashboards. If you are new to this, please review the articles related to [Harmoni Dashboards](#).

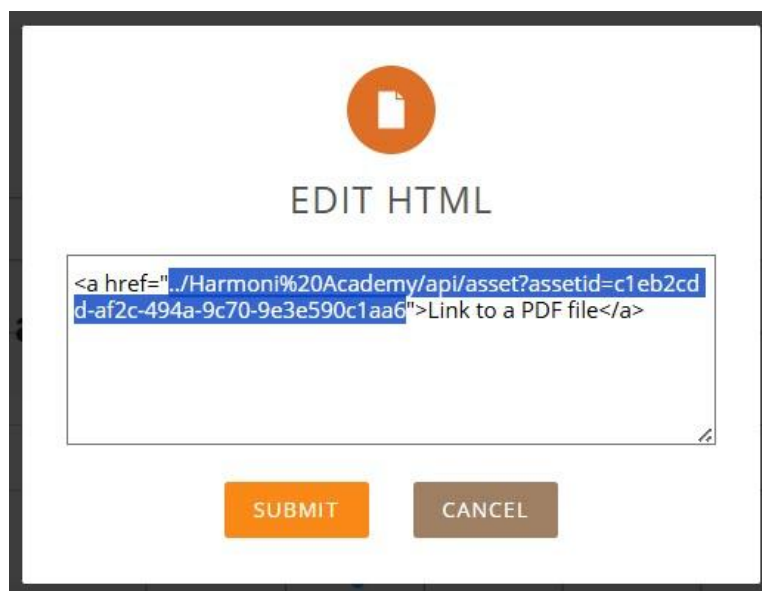
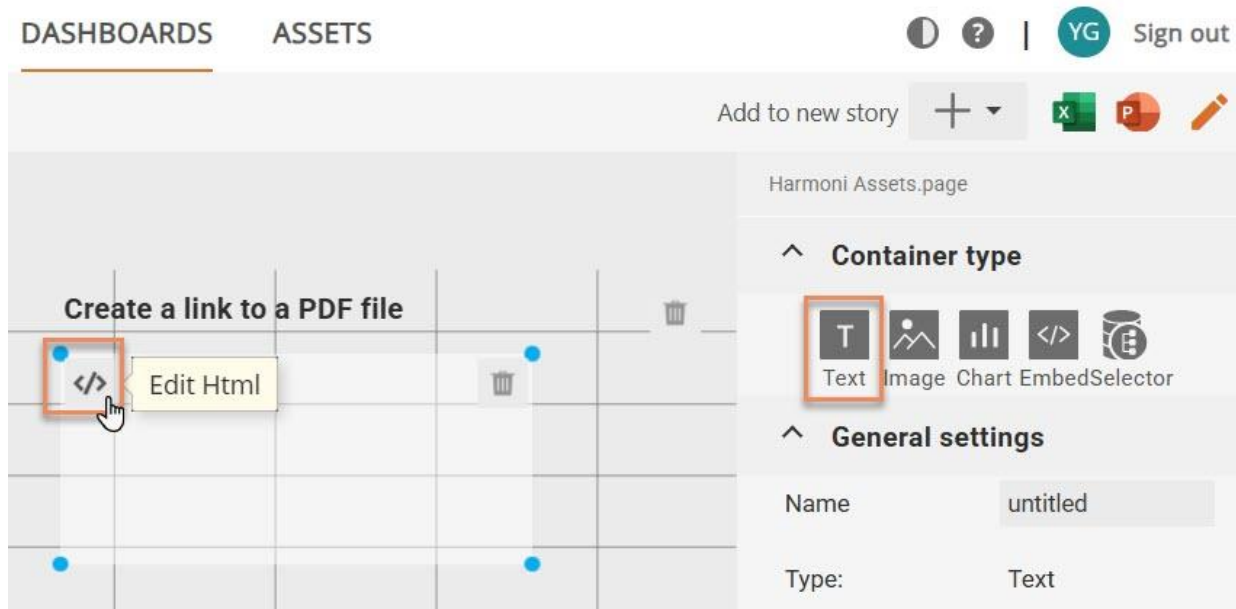
To link files and images, you have the option of using the custom link field in the tool panel or HTML code. However, videos can only be linked through the custom link field in the tool panel.

Files

To add a file to your dashboard, you have two options. You can either use HTML code within your text container or create a text or image container and add a link to the file in the custom link field located in the tool panel.

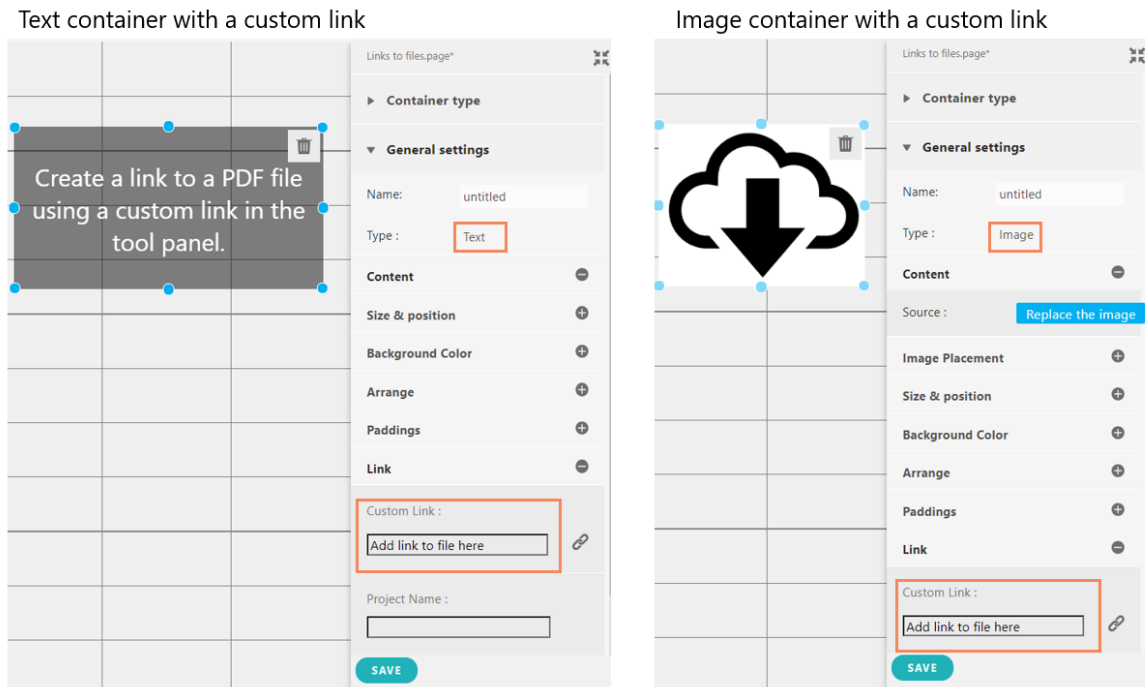
HTML Code

Add a text container and click the View HTML button `</>`. Insert the link copied from ASSETS.



Custom Link Field

Add your text or image container and insert the link copied from ASSETS into the custom link field.



- PDF files open in a new tab, which can be downloaded if required
- Excel, Word, and PPT files automatically download

Images

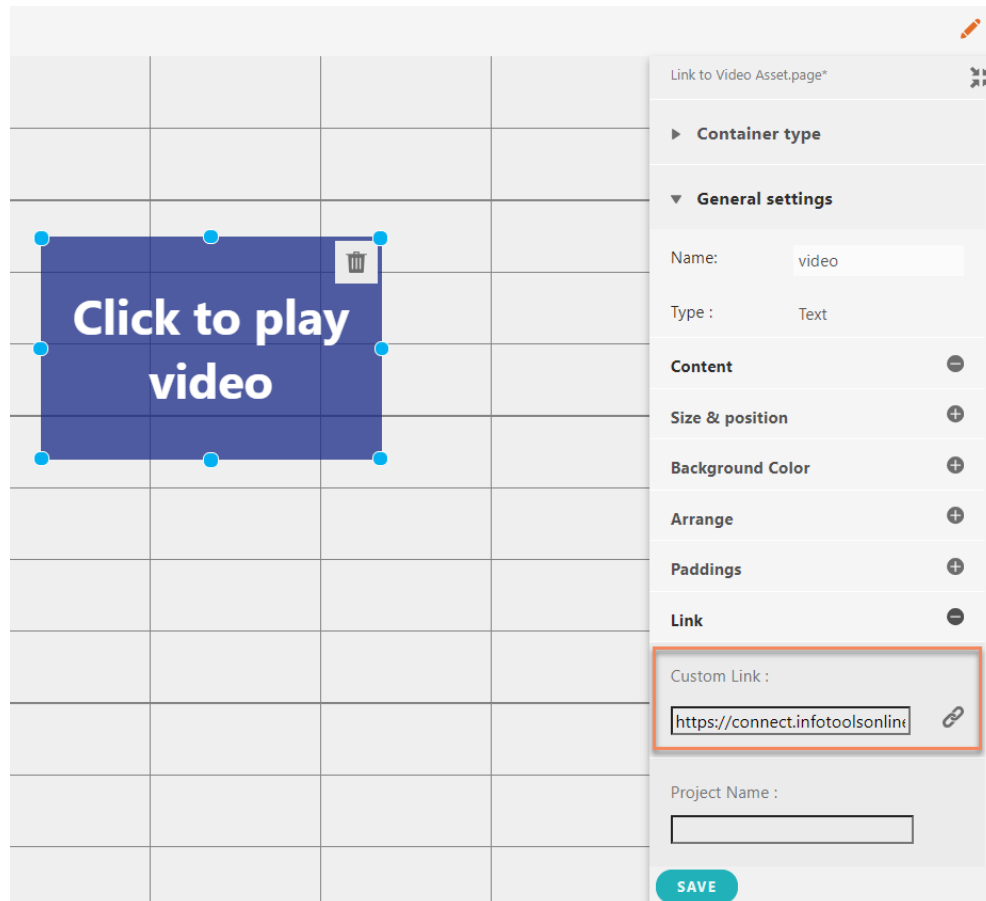
In Harmoni, you have the option to display images on your dashboard using a basic image container. However, if you want to be more creative with your designs, uploading files to ASSETS and utilizing Custom CSS can be a great solution.

- Images linked via the tool panel open in a new tab.
- Images linked via HTML code need to include sizing instructions within the code.

Learn more about [dashboard containers](#).

Videos

To link a video, you can only use the custom link field. You have the option of using a text or image container in the dashboard depending on your design needs. From there, insert the link in the tool panel to access the video stored in ASSETS. The video will open in a new tab.



- Copy the link to the video from ASSETS
- Select and format a text or image container
- Paste the link into the Custom Link field in the tool panel.
- Press save
- Click the container to play the video, which opens in a new tab.

Fonts

You can include custom font files stored in Assets using HTML Code.

HTML Code

Add a text container and click the View HTML button `</>`.

Add the code to define your font and include the link to call the font file stored in your Assets area.

