Quick Start Guide for iBase 7

Contents

1 Logging in

From the landing page, click on Log In:

- Enter your email address and password.
- Where required, read the terms and conditions and check the box.
- Click Log In.

2 Account details

To change your password and/or email address:

- Click on the Account Icon on the top menu.
- Click on Account Details / Change Password and follow instructions as required.

3 Folders

3.1 Basics

From the homepage, click on Folders from the navigation menu on the left to expand the folder structure:

- A folder can contain subfolders and files.
- Clicking on a folder will access the subfolders and files.
- The menu bar shows your location within the folder structure.

3.2 Navigating the folders

The left hand navigation is visible on every page. This contains the folder, collections and search options.

Your location within the folder structure is shown by dropdown menu. The current folder is shown at the top of this list and the parent folders are shown further down.

3.3 Adding a folder

To add a new folder:

- Click on Folders from the left hand navigation to open the folders structure.
- By default, the new folder will be added to the currently selected folder, therefore find that folder first. Once the correct folder is open, click on New Folder.

3.4 Editing a folder thumbnail

A new folder will automatically be given a thumbnail.

To change the thumbnail, click on upload poster and choose a new image. (This process is the same as for uploading assets).

The same process is used to update the thumbnail on all folders and assets throughout the system.

3.5 Granting access to content

By default when a new folder is created, users have 'inherent' access to content based on their User Role (for details on User Roles see the Admin section).

This can be changed as required by a system manager or owner (i.e. the user who created it).

Select the folder to change and click on Share Folder.

4 Assets

4.1 Searching

To view all the assets, select Explore All from the left hand navigation.

To alter how the assets are viewed use Sort By and Items/Page.

If you are searching for a specific file, enter keywords relating to your search in the search box at the top right of the page.

A detailed search can be carried out using the Field Search - enter the search information, e.g. Van, in the required field(s) and click on Search to view the results.

From any search results, Refine Search can be used to narrow the results.

4.2 Viewing details and editing

Click on an asset to open its profile:

- From this page, use the tabs to see the file details, description, notes, etc.
- An editor can amend the asset by selecting the correct tab and choosing Edit Item from the navigation.
- Once you have carried out your amendments, click Update Item to save the changes.

4.3 Downloading an individual asset

On an asset's page, click download.

Choose the required size from the drop down menu.

Follow the instructions on the screen.

4.4 Downloading a selection of assets

Click on the square in the top left of the assets to select them:

- As they are selected they will appear as images at the bottom of the page.
- Click download and choose the required size from the drop down menu.
- Note that a group of assets can only be downloaded in the same size format.
- Follow the instructions on the screen.

4.5 Viewing a selection of assets

Asset that have been selected will stay selected until the user logs out, or until they deselect them.

The number of selected assets is noted at the top of the screen.

Clicking on this button will open the selected assets at the bottom of the screen, from here you can choose how to use them.

4.6 Uploading an asset

Click on Upload Files from the top navigation to open the Upload Files form.

- Click on Folders and choose from the folder structure where the assets is to be filed.
- Drag and drop onto Drop Your Files Here, or choose Select Local File to browse folders on your PC.
- A thumbnail of the asset is displayed once the upload is complete.
- Once uploaded, click on a thumbnail to open its profile page, where the description, keywords and notes can be added.

4.7 Updating an asset

Click on the asset to open it:

- Choose Edit Item. This puts the page in edit mode so that the fields can be updated.
- To keep all the information but upload a new version of the file, choose Upload New Version from the More Options list.
- Move to Trash removes the asset from the system, however it can be reactivated if required.
- Move to Archive files the asset into an archive area and removes the information about it.

5 Shared collections

Shared Collections are made available to users as required. By default, assets are available to users depending on their system privileges, however Shared Collections can also be assigned to external users who don't have system access.

Shared Collections allow a user to save groups of assets together for future reference or to share with others.

5.1 Creating a new shared collection

There are two options for creating a new shared collection:

1. New Collection creates an empty collection.
2. New Collection with Selection creates a collection and automatically populates it with any assets that are currently selected in the system.

Select the type of new collection you require, enter a title and choose where the collection will be filed (e.g. it may be added as a sub-folder to an existing Shared Collection), then click on Create Collection.

5.2 Sharing a collection and granting access to content

The system allows a user to share assets with groups of people or individuals:

- To set this up, open the collection you'd like to share.
- Click on Share Collection.
- From this window you can set up who has access to the folder and what they can do with the content.
- NOTE: System Managers will get access by default when a shared folder is created, this can be changed if as required.

5.2.1 Sharing a collection

To give a role access to the Shared Collection, click into Grant Access To, which will open a drop down list of roles. Select a role and click Add.

If you start typing the email address of an existing user into the field, the system will add any matching users to the list. Click on the required user and click Add.

5.2.2 Granting access to content

Once the required users or roles have been added to the list, click on the Access dropdown to see a range of privileges. These allow the content to be used in different ways.

If required different access can be given to each user or role.

5.3 Sharing a collection by email

Click on Via Email to open a screen where the email details and a message can be added.

Click on Send Email.

6 Administration

Click on the Admin Icon to access the Admin Section and system configuration. If system changes are required, a full technical manual can be found under Documentation.

7 Edit page content

On the home page, select Edit Page Content from the drop down list to change the text on the home page.

On the text box window show, make the required changes to the content and click Update.

8 User accounts and roles

Select Admin pages from the drop down list to see a full page of options.

There are three areas to consider:

- Users: to set up or edit a user.
- User roles: to see or amend the access levels and privileges.
- Access types: to manage the options used in the system menus.

8.1 User roles

The User Roles determine what functionality a user can access in the system. A User Role is given when a new user is set up on the system, it can be changed by a system manager at any time.

Here are some example User Roles, yours will probably not be the same:

System Manager:

- Full control.

Contributor:

- View and download assets.
- Upload content and edit the content they add.
- No access to the Admin Pages.

Internal:

- View and download assets.
- No access to the Admin Pages.

External:

- View assets.
- Download assets when permission is given (using Shared Collections).
- No access to the Admin Pages.

NOTE: Different levels of access can be given to users by folder as required (see Shared Collections).

8.2 Managing users

From the Admin pages, listed under Security, click on Users:

- The screen shows all user accounts.
- Click on a name to open the Account Details (or use the search field to find a name).
- Click Add User to open a user entry form.
- The Clone button is useful and saves time if you are adding a new user whose details are similar.
- A user's details can be amended by the System Manager.

8.3 Adding a new user

Complete the fields on the form:

- A user's access can be disabled and enabled as required.
- Choose the User Role.
- Click Update and Send Details and the new user will be sent a system email with a link to log into the system. The user can add a password and update information once they log in.

8.4 Forgotten passwords

If a user forgets their password they can request a link to set up a new one from the Log In window.

9 Reports

System managers can find out more information about the how the system is being used by visiting the reporting area:

- Select Reports on the Admin Page.
- Click on a report from the list, add the search criteria/date range.
- Click Run Report.

10 Items in archive / items in trash

System Managers can permanently delete items from the Trash.

Click on an item and click Empty Trash.

System managers also can archive assets.

END