Quick Start Guide for iBase7

Contents

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Note: Shortcut keys

A letter in square brackets indicates a shortcut key for this action, for example **[U]pload** indicates that U this is the shortcut key for uploading. There's a summary of all keyboard shortcuts here.

1   Logging In

Click on the **Log In** button at the top of the page:

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

If you have forgotten your password, you can reset it by clicking **Reset Your Password**. The system will send you an email with a link which will allow you to reset your password.

2   Account Details

To change your account details, including address, password, or your preferences:

- Move the mouse to hover over the **Account** icon 👤 at the top of the page.
- Click on the appropriate menu option and follow the instructions as required.

3   Folders

3.1   Basics

Click on **Folders** from the navigation menu on the left to expand the folder structure:

- A folder can contain sub-folders and files.
- Clicking on a folder will display a gallery view of the folders and files within it.
- An item can only be in one folder but can be moved to another folder.

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 a drop-down menu at the top of the folder page. 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:

- From within a folder page, click on **New Folder**.
- Enter the folder name.
- By default, the new folder will be added to the current one. Click on the **Add to** drop-down to select a different folder.
- Click **Create** to create the new folder.
- If the **Create another** box is checked the process will be repeated.

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3.4   Editing folder details

To edit a folder's details, click on the **Details** button at the top of the folder gallery view:

- To edit a folder's metadata, click on **[E]dit Item**.
- To change the folder's image, click on **[U]pload Poster** or **Select Poster**.
- To change the folder name, click on [E]dit Item.

3.5   Setting folder access and permissions

To set the access and permissions that users have on a folder, hover over the **Details** button, then click the **Share** button on the drop-down menu:

- By default, folders inherit their permissions from their parent folder, these can be overridden or added to.
- To override an existing permission, click on the relevant drop-down and select the required permission.
- Permissions can be granted to individual users or roles (groups of users). To add a permission to a user or role, start typing the name into the **Grant access to** search box. The system will display a list of matching users and roles, click on the one required to add it to the list of permissions, then click on the relevant drop-down to set the permissions required.
- To remove a permission, click on the relevant **Remove** button. Note that inherited permissions cannot be removed.

3.6   Removing a folder

- To remove a folder, click on the **Details** button at the top of the folder gallery view and in the more options drop down ⋮ select **Move to Trash**.

4   Files

4.1   Uploading a file

Files can be loaded into the system in a variety of ways:

- Dragged directly onto a folder gallery. If you have permission to upload to that folder (see section 3.5) the files will be uploaded, otherwise no action will take place.
- Click on **[U]pload Files** at the top of the page to open the Upload Files form:
    - Click on **Folders** and choose from the folder structure where the files are to be uploaded to. Note that you will only be presented with those folders which you have upload permission on.
    - Drag and drop your files onto **Drop your files here** or choose **Select Files** to browse the folders on your PC and select the files you wish to upload.
    - A thumbnail of each file is displayed once it has been uploaded.

4.2   Viewing and editing a file's metadata

To view a file and its associated metadata, click on its thumbnail in any gallery view. This will take you to the Item page. To edit the file's metadata:

- Click **[E]dit Item** at the top of the page, this will put the page into edit mode.
- Once you have made your changes, click **Update Item** to save them.

5   Searching

There are several ways of searching for files:

- Use the **Quick Search** at the top of the page to type in your search terms, the system will return all files where the term appears anywhere in the metadata. Several terms can be entered and combined with Boolean terms AND, OR and NOT.

- To carry out a more specific search, use the **Field Search** on the left-hand navigation. This allows you to restrict the search to specific fields and specify what kind of match is required.

- The **Location Search** on the left-hand navigation allows you to search for or browse files using their associated geolocation metadata.

- To view all the files, select **Explore All** from the left-hand navigation.

- To alter how the files are viewed use the **Sort By** ↓⅄ and **Items/Page** 20 50 | 100 icons at the top of the gallery.

- From any search results, **Search Within** at the top of the gallery can be used to perform an iterative search.

Note that all searches carried out will only return files contained within folders that you have permission to view.

6   Selections

Items can be **selected** by:

- Checking the box top left of a thumbnail in the gallery – mouse hover over a thumbnail.
- Or with the **select button** on the menu of an item page.

Selected items are displayed in a panel at the bottom of the page where there are a range of options available which will operate only on the selected items.

If **Open Full Page** is used the browser back button can be used to return to the bottom panel.

6.1   Searching within selections

Using **Search Within** in **Selections** the full range of search options are available, i.e. By Field, Subject, Location and Folder / Collection, and Recent Searches.

7   Downloading

Items can be downloaded by users who have the necessary permissions, and for images and videos a range of size and format options can be offered.

7.1   Downloading an individual file

On the item page click **[D]ownload**.

7.2   Downloading a selection of files

Select the items for download, and in the **Selections** window click **Download**.

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8   Collections

8.1   Basics

Click on **Collections** from the navigation menu on the left to expand the collections structure:

- A collection can contain folders, files and other collections.
- An item can be added to any number of collections, these are not copies of the item but shortcuts. Removing an item from a collection does not delete the item from the system.
- Clicking on a collection will display a gallery view of the items within it.

8.2   Adding a collection

To add a new collection:

- Click on **Collections** from the navigation menu on the left.
- From within the Collections gallery view, click on **New [C]ollection**.
- Enter the collection name. By default, the new collection will be added to the current one. To add it to a different collection, click on the **Add To** box to see and select the required collection.
- Click **Create** to create the new collection.

To add a collection of selected items:

- Hover over the New Collections button and select **New Collection with Selection** and then proceed as for adding a new collection above. The collection will be created **containing selected items**.

8.3   Editing collection details

To edit a collection's details, click on the **Details** button at the top of the collection gallery view:

- To change the collection's image, click on **[U]pload Poster** or **Select Poster**.
- To edit a collection's metadata, click on **[E]dit Item**.
- To change the collection name, click on **[E]dit Item.**

8.4   Sharing Collections

To share a collection, hover over the **Details** button at the top of the collection gallery view then select **Share.** Any share already enabled is displayed, typically the System Manager role will already be listed.

8.5   Creating a new shared collection

To set up a new share:

1. Click the **Grant access to** box and select one from the options listed.
2. The new share is now listed in the panel below together with the type of **Access**, the default access is View. To change the type of access, click the arrow and select from the options listed.
3. Shares listed in the panel can be **Removed** if the person editing the shares has permission to do so.

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8.6   Sharing a collection and granting access to content

A link to the share can be sent **via email** (top left) or to a **social media** link if any have been made available in the system and the item is publicly viewable.

To see and copy the sharing link click **Show Shareable Link** on the top right.

9   Editing Page Content

To see a list of all the pages that can be edited hover over the **Page** icon in the top menu bar then click **Pages**. From there to edit a page's content click **Open** to open the page, then click the **Page** icon and select **Edit Content**.

Click the **Page** icon in the top menu, and if the current page is editable **Edit Content**, **Edit Metadata** and **Page History** options are available.

10 User Accounts and Roles

Hover over the Cog icon on the top menu bar and select **Admin Pages**. There are many settings that can be viewed and edited, but we'll look at just those you are most likely to want to use.

10.1 Managing users

Click **Users** under the **Security** heading.

Every registered user is listed with their **Status** displayed. To view and update their details click the **Edit** button. To send an email to the user with a password reset link, click **Update And Send Details**.

10.2 Forgotten passwords

Users can generate their own password reset at **Log In** by clicking **Reset Your Password**. Or a system manager can send a password reset email to the user by clicking **Update And Send Details** from the user details edit page.

10.3 Adding a new user

Click **Users** under the **Security** heading, then click the **Add User** button at the top of the page.

10.4 User roles

Click **User Roles** under the **Security** heading.

There are three default **User roles** - Contributor, Staff and System Manager – and by clicking their **Edit** buttons the role's permitted **Functions** and **Inherited Roles** can be viewed and changed. A **Description** for the role can be added, and the **Start page** set.

10.5 Reports

Under **Import / Export** click **Reports**. Click the **Run** button for the required report, then select the output format and date range required.

11 Items in Archive

Items in **Archive** can be viewed under the Cog ⚙ icon on the top menu bar.

Archive might be used for items for which you want to be able to refer to, or perhaps restore to general view - much like a museum, art gallery or library don't always have space to put everything on public display but will rotate with items in the archive.

12 Items in Trash

Items in **Trash** can be viewed under the cog ⚙ icon on top menu bar.

Trash can be used like the Recycle Bin in Windows or Bin on a Mac and items eventually permanently deleted or restored as required.

13 Keyboard Shortcuts Summary

iBase supports the following keyboard shortcuts:

Shortcut key	Action
All Pages	
u	Upload new Item
c	Create new blank item
All Gallery and Item Pages	
Page Up	Previous Item/Page
Page Down	Next Item Page
Item Page (Read Mode)	
e	Edit Item
Space	Select Item
d	Download
Item Page (Edit Mode)	
Return	Save
Esc	Cancel
Pop-Up Windows	
Esc	Close Window

END

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