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1 Welcome to the iBase Manager Net Admin Help

As a default, the navigation menu on the left of this window displays the Table of Contents for iBase Manager Net.

Each section can be expanded by clicking on its book icon. To learn more about any topic, simply click on the appropriate link within.

Note that a standard index can be shown instead of the Table of Contents, by clicking on the Keyword Index link at the top. The Table of Contents can then be restored by clicking on the altered Table of Contents link again, in the same location.

While viewing the Index, moving the mouse pointer over a Keyword will show the Topics relevant to it. To learn more about a topic, simply click on the link.

2 Purpose

This Guide is designed to allow you to administer iBase Manager Net as quickly as possible. It assumes that:

- You have the Administrator login ID and password for iBase Manager Net.
- You understand the basic concepts of databases.
- Your system database is installed and configured.

3 Copyright

Copyright 2005 iBase Image Systems Ltd. All rights reserved.

This manual is copyright of iBase Image Systems Ltd. with all rights reserved. Under the copyright laws of the United Kingdom and other countries, this manual cannot be reproduced, stored in a retrieval system or transmitted, in any form or by any means, photocopying, recording or otherwise, without the prior written permission of iBase Image Systems Ltd. No patent liability is assumed with respect to the use of information contained herein.

4 Disclaimer

This manual has been validated and reviewed for accuracy. The included set of descriptions and instructions are accurate at the time of this manual's production. Succeeding enclosures, manuals and updates, however, are subject to change without notification.
5 Main Administration Section

Once you have logged into the system as an Administrator, the navigation bar at the top of the window will show an extra link for 'Administration'.

Click on this link to enter the main Administration section of the site.

There are several areas within this section; follow the relevant link below to find out more:

- Security
- Lists
- User Defined Entities and Pick Lists
- External Systems
- Upload
- Printing
- Meta Data
- Other

6 Security

6.1 Introduction

This area contains management functions related to roles, users and auditing:

- Manage Roles
- Manage Users
- Search Audit Trail

6.2 Manage Roles

Roles are a way of grouping similar users together, so that the system behaves the
same for each of them. Any user can have a number of roles.

For example, a group of users may temporarily form a project team, or perhaps a committee, where they all require access to the same subset of images or data. They may also be required to perform certain operations only.

On the screen, new Roles can be created by clicking on the Create Security Role link on the left. Existing roles are shown in the main list, and each one can be edited or deleted. When deleting a Role, confirmation will be requested.

When creating or editing a Role, the following information can be specified:

- **Role** - the unique name for the role, as used throughout the system.

- **Permissions** - define the abilities that users in this role can perform, within the system.

- **Departments** - the type of access (either None, Full or ReadOnly) that they have to certain departments' jobs and images, when using the system.

- **Upload Policies** - the upload policies that they can use, when uploading images into the system. If only one policy is permitted for a role, users having that role will never be asked to choose a policy.

- **Collections** - restrict access to the Collections that are defined in the system.

6.3 Manage Users

User accounts define a means of access to the system, for every person who requires it. Each user must log into the system before they can use it.

On the screen, new Users can be created by clicking on the Create Security User link on the left. Existing users are shown in the main list, and each one can be edited or deleted. When deleting a User, confirmation will be requested.

When creating or editing a User account, the following information can be specified:

- **User Name** * - the unique name for the user, as used throughout the system.

- **Password** * - the password that this user must enter during the login process, before they can access the system.

- **First Name** * - the forename of the user.

- **Last Name** * - the surname of the user.

- **Email** * - the email address of the user.
6.4 Search Audit Trail

Every time that a user performs an action, the details of the event are recorded in the Audit trail. This becomes a large list of all actions performed, over time, which would be too large to browse through.

The Search Audit Trail function can be used to quickly find related events, across the entire Audit history. The following event criteria can be specified, to gain a narrow view of an exact trail of user actions:

- **Date Audited** - only show events within these start and end dates.
- **User** - only show actions done by this user specification *.
- **Client Host Name** - only show events recorded from machines with this hostname specification *.
- **Client IP Address** - only show events recorded from machines with this IP address specification *.
- **Succeeded** - only show actions that either Succeeded or Failed.
- **Information** - for additional information, particular to the type of action. Different actions record different descriptive textual information. Therefore, using this criteria will result in actions having such a specification *.
- **Type** - only show actions of this type.
- **Entity** - only show actions that operated on this entity.

* Additionally, any criteria that are in text format can be restricted further by using the following search modes:
  - **Contains** - finds the criteria regardless of where it is within any field.
  - **Equals** - only finds the criteria if it exactly matches the entire field.
  - **Starts With** - finds the criteria if the the field starts with it.
  - **End With** - finds the criteria if the the field ends with it.
After clicking on Search, the results are shown in a list, with the most recent events at the top.

7 Lists

7.1 Introduction

This area contains management functions related to system entities:

- Manage Jobs
- Manage Keywords
- Manage Departments
- Manage Source Formats
- Manage Collections
- Manage Copyright Statements
- Manage Credit Lines

7.2 Manage Jobs

Jobs are a way of grouping images together into episodes, and for storing common information about them.

On the screen, new jobs can be created by clicking on the Create Job link on the left. Existing jobs are shown in the main list, and each one can be edited or deleted. When deleting a job, confirmation will be requested.

When creating or editing a job, the following Core information can be specified:

- **Job number** * - the unique number for the job, as used throughout the system.
- **Date of Job** * - the date when this job was created.
- **Department(s)** * - the departments that the job belongs to.
- **Uploaded by** - the user who uploaded the job.
• **Job Notes** - additional notes relating to the job.

• **Default Access Level** - whether, by default, the job images are accessible to all or just the departments the job belongs to.

• **Default Collections** - whether, by default, the job images should be initially included in the specified collections.

• **Default Keywords** - whether, by default, the job images should have keywords assigned.

* mandatory fields.

Note that other system-specific information may be defined, in addition to the Core information, which is indicated by the presence of extra links at the top-left of the window (next to the word *Job*). Clicking on any such links will cause the extra fields to appear, expanded in a new section underneath. The extra fields can be hidden again by clicking on the expanded section.

### 7.3 Manage Keywords

Keywords are a way of summarizing the information of an image in the system, by using common words or phrases. This is similar to the index of a book, except these key words are organized into groups within a central hierarchy. This hierarchy can be viewed as a flat alphabetical list if required.

Each key word defined in the hierarchy can be assigned to any images. This creates a searchable keyword index, so that images having the same key words assigned can be found quickly.

On the screen, the view can be changed to show a flat alphabetical index by clicking on the *View by Index* link on the left, and then returned to a full hierarchy by clicking on the *View by Hierarchy* link (in the same position). The index view shows all keywords, but the hierarchy view only shows the keywords under the current node, which defaults to the single root (top) node. Clicking on a keyword will show its hierarchy view, so that its child nodes are shown.

New keywords can be created by clicking on the *Create Child* link on the left, but only when viewing the hierarchy, because new keywords must have a position under an existing hierarchy node. Each keyword can be edited or deleted. When deleting a keyword, confirmation will be requested.

When creating or editing a keyword, the following information can be specified:

- **Name** - the unique name for the keyword, as used throughout the system.

- **Description** - a description of the keyword.
7.4 **Manage Departments**

Departments are a way of separating images and jobs into their logical subsets within your organisation. They may be used to restrict a user's access to jobs and images.

On the screen, new departments can be created by clicking on the *Create Department* link on the left. Existing departments are shown in the main list, and each one can be edited or deleted. When deleting a department, confirmation will be requested.

When creating or editing a department, the following information can be specified:

- **Name** - the unique name for the department, as used throughout the system.
- **Description** - a description of the department.

7.5 **Manage Source Formats**

Source Formats are a way of specifying the original format of an image that has been uploaded into the system.

On the screen, new formats can be created by clicking on the *Create Source Format* link on the left. Existing formats are shown in the main list, and each one can be edited or deleted. When deleting a format, confirmation will be requested.

When creating or editing a format, the following information can be specified:

- **Name** - the unique name for the source format, as used throughout the system.
- **Description** - a description of the source format.

7.6 **Manage Collections**

Collections are a way of grouping images, where they relate to a similar subject. For example a collection could be defined to hold the images from a single source, or images concerning a particular event that occurred. They may be used to restrict a user's access to images.

On the screen, new collections can be created by clicking on the *Create Collection* link on the left. Existing collections are shown in the main list, and each one can be edited or deleted. When deleting a collection, confirmation will be requested.
When creating or editing a collection, the following information can be specified:

- **Name** - the unique name for the collection, as used throughout the system.
- **Description** - a description of the collection.

### 7.7 Manage Copyright Statements

Copyright Statements are used to label images in the system, where their ownership or usage is legally defined.

On the screen, new statements can be created by clicking on the *Create Copyright Statement* link on the left. Existing statements are shown in the main list, and each one can be edited or deleted. When deleting a statement, confirmation will be requested.

When creating or editing a statement, the following information can be specified:

- **Name** - the unique name for the statement, as used throughout the system.
- **Description** - a description of the statement.

### 7.8 Manage Credit Lines

Credit Lines are a way of acknowledging people or organisations who have provided images in the system.

On the screen, new credit lines can be created by clicking on the *Create Credit Line* link on the left. Existing credit lines are shown in the main list, and each one can be edited or deleted. When deleting a credit line, confirmation will be requested.

When creating or editing a credit line, the following information can be specified:

- **Name** - the unique name for the credit line, as used throughout the system.
- **Description** - a description of the credit line.
8 User Defined Entities and Pick Lists

8.1 Introduction

This area contains management functions related to User-Defined Entities and Pick Lists, which are dependent on the current system.

9 External Systems

9.1 Introduction

This area contains management functions related to integration with external systems:

Manage External System Policies

9.2 Manage External System Policies

External System Policies are a way of managing connections to external systems, whether for importing jobs or images.

The following settings can be configured:

- **Job System Mode** * - how jobs are brought in from external job systems. *Internal* will just use the jobs within the current system. *Job System Import* will look for jobs from the external system when uploading, in real-time. *Job System Load* will look at a defined time or after an elapsed period.

- **Job Number Format** - this specifies the format of the job number in the external system. Field specifiers are contained within braces, but other characters are just literals. The field specifier options are:

  1. `sequence:000` - a sequential number to uniquely identify the job. The number of zeroes indicates zero-padding, up to the minimum length of the number.
  2. `date:yyyyMMdd` - the current date, using the specified ISO format.
  3. `username` - the current login name.

- **Image System Mode** * - how images are brought in from external image systems. *Internal* will just use the images within the current system. *Job System Import* will look for jobs from the external system when uploading, in real-time.
• **Loader Scheduled?** * - whether to use one of the two scheduling methods below, or no scheduling.

• **Loader Scheduled Time** (hh:mm) - the time that the scheduled load should occur, if the relevant *Scheduled* option is set.

• **Loader Scheduled Elapsed Period** - the time that should elapse before the scheduled load occurs, if the relevant *Scheduled* option is set.

* mandatory fields.

## 10 Upload

### 10.1 Introduction

This area contains management functions related to upload processes:

- Manage Hot Folders
- Manage Archive Folders
- Manage Fail Folders
- Manage Locations
- Manage Overlays
- Manage Upload Policies
- Loader Errors

### 10.2 Manage Hot Folders

Hot Folders are filing system folders that can be used to upload job images. Images are placed in a Hot Folder and then uploaded into the system.

On the screen, new folders can be created by clicking on the *Create Hot Folder* link on the left. Existing folders are shown in the main list, and each one can be edited or deleted. When deleting a folder, confirmation will be requested.
10.3 **Manage Archive Folders**

Archive Folders are filing system folders that can be used to store original referenced images within the system, once they have been uploaded into the system.

On the screen, new folders can be created by clicking on the *Create Archive Folder* link on the left. Existing folders are shown in the main list, and each one can be edited or deleted. When deleting a folder, confirmation will be requested.

10.4 **Manage Fail Folders**

Fail Folders are filing system folders where images will be stored if they failed to upload properly.

On the screen, new folders can be created by clicking on the *Create Fail Folder* link on the left. Existing folders are shown in the main list, and each one can be edited or deleted. When deleting a folder, confirmation will be requested.

10.5 **Manage Locations**

Locations are the main filing system folders used to store all the unreferenced images, surrogates and thumbnails that have been uploaded into the system.

On the screen, new locations can be created by clicking on the *Create Location* link on the left. Existing locations are shown in the main list, and each one can be edited or deleted. When deleting a location, confirmation will be requested.

10.6 **Manage Overlays**

Overlays are a way of automatically drawing a logo on images uploaded into the system.

On the screen, new overlays can be created by clicking on the *Create Overlay* link on the left. Existing overlays are shown in the main list, and each one can be edited or deleted. When deleting an overlay, confirmation will be requested.

When creating or editing an overlay, the following information can be specified:

- **Name** - the unique name for the overlay, as used throughout the system.
- **Image** - the image file to use when overlaying. This image file path must be
accessible to the server.

- **Use Black as transparency** - tick this box if black pixels should be ignored when the overlay is drawn onto each image.

- **Use proportional sizing** - (recommended) tick this box if the overlay should be scaled, relative to the image it is being drawn on, by the scaling factor below. If this is not ticked, then the overlay will be drawn onto each image at its actual size, so the results will be different for the surrogates.

- **Scaling** - the relative size of the overlay, compared to the image being drawn on. For example, 50% will cause the overlay to be half of the width / height of the image, which will cover one quarter of the image area.

- **Blending** - the amount of opacity for the overlay when it is drawn onto each image. For example, 100% would give a solid overlay, 50% would be semi-transparent and 5% would be almost completely transparent.

- **Horizontal Align** - the horizontal alignment of the overlay, compared to the image. Options are Left, Middle, or Right.

- **Vertical Align** - the vertical alignment of the overlay, compared to the image. Options are Top, Middle, or Bottom.

### 10.7 Manage Upload Policies

Upload Policies are used whenever images are uploaded into the system. They specify how the images should be dealt with, as they are brought into the system.

On the screen, new policies can be created by clicking on the **Create Upload Policy** link on the left. Existing policies are shown in the main list, and each one can be edited or deleted. When deleting an policy, confirmation will be requested.

When creating or editing an policy, the following information can be specified:

- **Name** * - the unique name for the policy, as used throughout the system.

- **Image Mime Type** * - the type of image file to use, when generating surrogate or thumbnail images.

- **Image Quality** * - the quality of images, when generating surrogate or thumbnail images. **High Quality** images are compressed less, but take up far more storage space.

- **Surrogate Thumbnail Resolution** * - the maximum width/height (in pixels) of thumbnails to be generated by the system.

- **Image Resolutions** - a list of resolutions to be generated by the system. The
maximum widths/heights (in pixels) can be added, updated or removed from the list.

- **Image Overlay** - the optional image overlay to use on uploaded images.

- **Location** * - the storage location for uploaded images, plus their generated thumbnails and surrogates.

- **Hot Folders** * - the Hot Folders that the system should examine during an Upload process.

- **Archive Option** * - what to do with the images in the hot folder, after they have been uploaded.

- **Archive Folder** - the folder to archive images to, if the archive option is set.

- **Fail Folder** - the folder to copy images to, if they fail to upload.

- **Reference Master Images** * - whether to reference each image from its original Hot Folder, move it into the system's Location folders, or move it into the Archive Folder and reference it from there. The last two options cause the original to be removed from the Hot Folder.

- **Check For Duplicates** * - whether the image source filename is checked to see if it has already been uploaded. If it exists, the upload for that image fails, and it is moved to the Fail Folder.

- **Keep Hot Folder Name When Archiving** * - when an image is moved into the Archive or Fail folder, whether they are separated into the Hot Folder's folder name or not.

The remaining options are specific to automatic uploading.

- **File Name - Number of Folders** - the number of parent subfolders to parse in order to find the job number, from the immediate parent upwards. For example, 0 would only examine the file's name, while 2 would examine the file's name, the parent subfolder, and the parent subfolder above that.

- **File Name - Separator** - the file name and the specified parent subfolder names are joined together with this single separator character before being split into parts, by using the same character. For example, if Number of Folders was set to 2, and the file's relative path was "20050101\job_1234\img001.jpg" then using an underscore separator would result in the following parts:

  20050101  job  1234  img001

- **File Name - Job Number Part** - the index of the part to use for the Job Number, from the front. In the above example, this would need to be set to 2 in order for the Job Number 1234 to be correctly determined.

- **Scheduled** * - whether to use one of the two scheduling methods below, or no scheduling.
- **Scheduled Time** - the time that the scheduled upload should occur, if the relevant *Scheduled* option is set.

- **Scheduled Elapsed Period** - the time that should elapse before the scheduled upload occurs, if the relevant *Scheduled* option is set.

* mandatory fields.

### 10.8 Loader Errors

Loader Errors are generated by the system if any images fail to upload.

The details of the error are stored in the database, and this list can be searched by entering any of these optional criteria:

- **Error Date** - only find errors that occurred within this range.

- **Hot Folder** - find errors for all *Hot Folders*, or just the one specified.

- **File Name** - only find errors relating to images with the specified file name. To further narrow the search, the file name can be *Equal to*, *Contain*, *Start With* or *End With* the value.

Clicking on the *Search* link will return the entries from the list that match the criteria. Each entry will show a reason for the failed upload.

The entire list can be cleared by clicking on the *Delete All* link, but confirmation will be requested first.

### 11 Printing

#### 11.1 Introduction

This area contains management functions related to printing abilities:

[Manage Print Layouts](#)

#### 11.2 Manage Print Layouts

Print Layouts are a way of defining where images and information are printed on a page.

On the screen, new print layouts can be created by clicking on the *Create Print Layout*
link on the left. Existing print layouts are shown in the main list, and each one can be edited or deleted. When deleting a print layout, confirmation will be requested.

When creating or editing a print layout, the following information can be specified:

- **Name** * - the unique name for the layout, as used throughout the system.
- **Description** - a description of the layout.
- **XSL File** - the file whose contents specify the layout of the printed information, in an XSL (Extensible Stylesheet Language) format.

* mandatory fields.

12 Meta Data

12.1 Introduction

This area contains management functions related to meta-data within the system:

- [Manage Entities](#)
- [Manage Pick Lists](#)

12.2 Manage Entities

Entities are the types of information stored in the system. There are two standard entities; Job and Image. Any further entities created will be User Defined.

On the screen, new entities can be created by clicking on the *Create Entity* link on the left. Existing entities are shown in the main list, and each one can be edited or deleted (except *Job* and *Image*). When deleting an entity, confirmation will be requested.

When creating or editing an entity, the following information can be specified:

- **Label** * - the unique name for the entity, as used throughout the system.
- **Description** - a description of the entity.

* mandatory fields.

Entities have defined [Schemas](#).
12.3 Manage Schemas

Schemas are groups of attributes associated with an entity in the system.

On the screen, new schemas can be created by clicking on the Create Schema link on the left. Existing schemas are shown in the main list, and each one can be edited or deleted. When deleting a schema, confirmation will be requested.

When creating or editing a schema, the following information can be specified:

- **Label** * - the unique name for the schema, as used throughout the system.
- **Description** - a description of the schema.

* mandatory fields.

Schemas have defined Attributes.

12.4 Manage Attributes

Attributes are the individual meta data fields, within the schema of an entity in the system.

On the screen, new attributes can be created by clicking on the Create Attribute link on the left. Existing attributes are shown in the main list, and each one can be edited or deleted. When deleting an attribute, confirmation will be requested.

A) When creating a new attribute for the first time (only), the type of information that will be contained must be specified:

- **Simple Types** - the attribute will be a simple standard field; one of these types:

  1. Yes / No - field can only be either Yes or No.
  2. Whole number - field can contain an integer number (without decimal point).
  3. Fraction number - field can contain a real number (with decimal point).
  4. Money - a two part whole number, for units and sub-units.
  5. Time - a time in hours, minutes and seconds.
  6. Date - a date in day, month and year format.
  7. Age - a duration in days, weeks and years.
  8. Text - any characters.

- **Entities and Pick Lists** - a more complex field; one of the following types or any User Defined ones that exist:

  1. Analog Source Type
  2. Department
  3. Keyword
4. Media Type 
5. Orientation 
6. Source Format 

If the attribute is an entity attribute, and can contain *Multiple Values*, the checkbox underneath must be checked.

B) When creating or editing an attribute, the following information can be specified:

- **Label** * - the unique name for the attribute, as used throughout the system.
- **Description** - a description of the attribute.
- **Display Order** * - the index that determines where in the schema the attribute is displayed.
- **Sort Results by this Attribute?** - whether results containing this entity are sorted by the attribute.
- **Sort Order** - the index which specifies the priority of this attribute, when being used for sorting.
- **Search Method** * - whether search interfaces should allow range searching for the attribute.
- **Edit Method** * - the control which should be used to edit the attribute.
- **View Format** - the format which the attribute is displayed in.
- **Display when browsing?** * - whether to display the field when performing a browse operation.
- **Is Mandatory?** * - whether the attribute must always be specified, or whether it can contain a null value.
- **Can be viewed by** - whether the selected roles can view the attribute.
- **Automatically allow new roles to view?** * - whether newly added roles can view the attribute.
- **Can be printed by** - whether the selected roles can print the attribute.
- **Automatically allow new roles to print?** * - whether newly added roles can print the attribute.
- **Can be searched by** - whether the selected roles can search for the attribute.
- **Automatically allow new roles to search?** * - whether newly added roles can search for the attribute.
- **Can be edited by** - whether the selected roles can edit the attribute.
• **Automatically allow new roles to edit?** * - whether newly added roles can edit the attribute.

* mandatory fields.

## 12.5 Manage Pick Lists

Pick lists are simple lists that can be used as part of the meta data in the system.

On the screen, new pick lists can be created by clicking on the Create Pick List link on the left. Existing pick lists are shown in the main list, and each one can be edited or deleted. When deleting a pick list, confirmation will be requested.

When creating or editing a pick list, the following information can be specified:

- **Label** * - the unique name for the pick list, as used throughout the system.
- **Description** - a description of the pick list.

* mandatory fields.

## 13 Other

### 13.1 Introduction

This area contains other miscellaneous management functions:

- Manage Orders
- Manage Order Policy
- Manage User Web Resources

### 13.2 Manage Orders

Orders are placed by users via the Light Box. They are placed in a queue to await manual processing.

This page is almost identical to the main View Your Orders option on the main navigation bar. However, in addition, this page allows administrators to both view and delete all existing orders on the list. The most recent orders are shown first. When deleting an order, confirmation will be requested, and the order will be permanently removed from the list.
To manually process an order, click on the View link. The details for the order will be shown, and the images can be viewed by clicking on the Open In Light Box link on the left. The most common action would probably then be to download the selection, to be delivered manually via post or email.

The status of the order can be changed to either Dispatched, or Cancelled, by clicking on the appropriate link on the left.

### 13.3 Manage Order Policy

The Order Policy specifies the behaviour of the email-based order-handling mechanism.

The following values can be updated:

- **Notification From Email Address** - the email address that signifies the system, in notification emails (the **From** header field). For example, order-system@ibase.com. This does not have to be a valid address, and the people fulfilling the orders should not reply to it.

- **Notification Email Addresses** - any number of email addresses, for the people who will be fulfilling orders. Notifications are sent **To** these addresses, which should be separated by commas.

- **Notification Email Subject** - the subject header for all notification emails.

- **Notification Email Text** - the text body for all notification emails.

### 13.4 Manage User Web Resources

User Web Resources provide a way of customizing certain appearance settings and content for the system.

On the screen, the **Retrieve Resources** link on the left will download all the current resources to your local machine. New or amended resources can then be uploaded by clicking on the **Browse** button, selecting a local file, and then clicking on the **Upload** link.

Existing resources are shown in the main **Uploaded Resources** list, and additional ones can be deleted. When deleting a resource, confirmation will be requested.

The following system files are usually present, and cannot be deleted:

- **banner.html** - the main banner for the site.
- **front.html** - the front page of the site.
- **terms-and-conditions.html** - the terms and conditions page.
- **user.css** - the main stylesheet.
• welcome.html - the welcome page.
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