



ImageSource General WHOI Users Guide – www.whoi.edu/ims

Logging In

To get to the site from the WHOI internal homepage, scroll down in the Resources section and select the WHOI Image Source link. Or, from either the Internal or External homepage, enter the url above.

If you are a WHOI employee, do not log in as guest/guest. That log-in was created specifically for non-WHOI personnel and it will only give you very limited access to the system. Use your WHOI ldap (email) log-in information.

Log in with your WHOI email ldap (jdoucette/*****), select the Log in button, and wait a few seconds for your log-in to register. Once successfully logged in, you'll land on the Collections page. There should be several Collections with representative thumbnail images and titles.

If you cannot log in successfully, the first thing you need to do is reenter your ldap and try again. The second thing to try is to empty the cache of your browser by entering your advanced list of browser preferences. If these steps do not work, please email the Ibase Administrator (jdoucette@whoi.edu) . (Note: the preferred browser is Firefox.)

How Items exist in the system

The items in the system are uploaded as batches of Jobs created by an uploading user. Typically, when the Jobs are uploaded by a user, the Job Number consists of the user's ldap user name, followed by the (two digit) year and ended with a sub-sequential user job number. For example, if I were to create a job right now, the system would create a job number of jdoucette_10_00036 because this will be the 36th consecutive job I have created this year. Upon upload the Jobs are assigned a descriptive Title of few words by the uploading user. Note: once a Job is created, it can be reentered and uploaded into/added to over time, so it is not a set or closed compilation of items.

Once the items have been uploaded into a Job in the system, they can be assigned to one or more Collections, or not. As they are uploaded they must be assigned to one or more Departments. They are also either assigned permissible "general" access by their uploader, or they can be locked into a "department" access, allowing only a select group to access them. "General access" allows all WHOI staff to view these items and to download these items from the database. Items within a job can be individually assigned either "department" or "general" access so that some items within a job can be either generally accessible or locked down from access. Non-WHOI people who do not have a specially assigned access role (assigned by the system administrator) can only view items in the database if they are assigned to the Public Collection. The guest/guest log in to the database only allows access to these items.

Searching in the database

There are several ways to accomplish a Search and the initial Collections page is merely one location you can do that from. It is not required that you search from here. These Collections have been set up as subsets of items to look at, and if you would like to Search this way, click the Selection box(es) of the Collection(s) you would like to Browse through or to Search within. If you'd like to bypass this restrictive method of Searching, continue to the next paragraph. Also, PLEASE NOTE: if you do Search within this method for a time, you must go back to this Collections page in order to Deselect the Collections you have selected so that you will then have Search access to the entire system, once again.

In order to Search the entire system from the Collections page you are on, either enter a simple Search word in the upper right section of the window and select "Go", *or* select Advanced Search to better focus your Search.

Advanced Searching

Once you've selected Advanced Search from the upper right hand corner of the page you'll land on the Advanced Searching page. If you'd like to browse all of the available Item thumbnails or the chronological index of uploaded Jobs, select either the Search Items button or the Search Jobs button. All of the item thumbnails OR the index of all the Jobs in the database will appear in descending sort order. To get to the thumbnails from the Jobs listing, go to the far right of the page and select the "Items" button.

To accomplish a more focused Advanced Search you need only fill in *one* of these fields on this page in either the Item Metadata section or the Job Metadata section. This is simply a more focused and efficient search. Enter your known information (metadata) into an appropriate field and then by selecting either Search Items or Search Jobs, you will accomplish a more focused search within the large database. For example, if you know that Tom Kleindinst shot a job for you sometime in a certain year, in the Job Number field of the Job Metadata section, enter "tkleindinst_06", and nothing more, since you do not know the assigned Job Number. When you now select Search Jobs, you will bring up, in descending/most recent order, all of Tom's uploaded jobs from that year and you can then view the thumbnails by selecting the Items selection on the far right side of the listing. You can then Search within a Search once you load all the items of a Job.

Navigating around the database

Once you are in a Job or further on into the system, if you look up along the selections bar you'll see You Are Here: which tells you where you are and how you got there. You can navigate back out the way you came in or you can navigate back by choosing another navigation selection. Note: the back button on your browser will not necessarily navigate you back out the way you got to where you are. It will only show you the very last page you were on, regardless of which direction you've been navigating in the system.

Once you are in a Job and have the entire collection of thumbnails on your page, you can choose how to display these thumbnails on that page. There are pull-down selections to

set your number of Items on a Page, as well as which Sort Order you'd prefer to view them.

Item Metadata

Once the Job is Created and Uploaded, its Metadata needs to be entered at the users earliest convenience. This takes an investment of time and it typically does not happen immediately upon upload, so if the items you are looking at have no Caption, Creator, or other Metadata entered, it is probably not a fault of the system or your browser. The job is simply not completed yet. The Item Metadata, which is item specific, appears at the right side of the page once you select any one thumbnail item you have showing in your group of items on a page. Below the Item Metadata is a section of Job Metadata, which is Job specific. If you find that you have permission to do so, please do not attempt to revise the metadata unless you've reviewed the process with the System Administrator or with a seasoned User. There is a specific set of guidelines to follow for this task in order to maintain the integrity and the usability of the system.

From within the specific Item Details view, you can enlarge the item for viewing, or you can download it to your desktop, or you can print/export a .pdf file to your desktop, depending on the specific item permissions set by the item originator upon the Job upload.

Downloading an Item

From your Item Details view of a singled out thumbnail, on the left side of the page select Download from under the "This Item" section. You will be prompted to enter a short Usage reason in the field below the automatically entered Name field. (This information you are required to fill in will live within the metadata of each item as a record of use.) Then select Download and the system will generate a Zip file, which it will then save to your computer desktop. To download more than one item at a time you can use the Lightbox utility to do so (see below).

Note: Items that are downloaded from the system will not have a white WHOI watermark on them.

Using the Light Box Utility

From your multiple thumbnails page, you can select one or more items to create as a subset to save for yourself or to share with another user. Simply select the box(es) in the upper right hand corner of the desired item(s) and then from the panel on the left of the page select Add Selected Items to Light Box. These items have not left the original job, they are now copied into a temporary Light Box for your use. You can also choose to Add All Items to a Light Box, rather than clicking all the items in their selection boxes.

Once you are in a Light Box (reassured by your navigational bar up top stating that you are in a Current Light Box) you should choose the selection on the left to Save your Light Box so that you can reuse your Light Box by clearing it or adding to it to make another subset for use. Once you choose to Save your Light Box, you are prompted to name your Light Box and then you are given a checkbox choice of Sharing your Light Box (check) or not (leave unchecked). We'll Share this one for now.

To view your Saved and Shared Light Box(es), select Shared Light Boxes from the pull down Light Box menu up top on the menu bar. You will land on a page of many Shared Light Boxes, which you can also load and view. Your Light Box is viewable and loadable by other people once you choose to Share it. Once you Load and then revise someone else's Light Box, then choose to Save the revisions, that Light Box will be saved under **your name**, not theirs.

To Delete or view only your saved Light Boxes, select Saved Light Boxes from the pull down menu up top and the Light Boxes you have originated and saved will appear next to your username. You can then either Load them or Delete them from here and they will no longer exist within the system.

Note: when you are within a Searched Job, if you choose to add items to a Light Box, the system automatically addresses the very last version of the Light Box you have Loaded/opened. Therefore, if you want to add to a fresh Light Box you need to Clear the Light Box you've been using (AFTER you have Saved it out as a Saved Light Box or a Shared Light Box). The Light Box is only a temporary utility until you save it out as a named Light Box.

Downloading a Light Box full of Items

To download a Light Box of multiple items to your desktop, from within the Light Box select Download from under the Selected Items section on the left. You will go through the same steps as the Download section above, however this time your Zip file will deposit a folder of several items on your desktop. This can take several seconds or up to a minute, depending on the amount of items that are in the Light Box.

Note: you can download a Light Box before you save that Light Box.

To print out and save a .pdf file of your Light Box items, from the left panel select "Print/Export", then select the Print button within the first choice of "Image with Caption and Date". This will create and download a .pdf file containing thumbnails of all the items in your light box. This is a simple way to share a set of items with anyone who does not have access to the system. You can email these .pdf files to anyone to share them.