WOODS HOLE
OCEANOGRAPHIC
INSTITUTION

URL for new system is: images.whoi.edu

[Bold text highlights available actions to take or notes to consider]

This is an Introductory User Guide to get you, as a WHOI staff member, logged in and using the system for image searching, downloading and sharing, as well as for lightbox creation and sharing.

There are video clips in this system, however it mostly contains still photographs and illustrations. Please follow any potential use restrictions noted within the item metadata. Please also note that these files are intended for WHOI research and educational use and WHOI staff personal non-commercial use. Any other use or ANY uploading of items into the system requires permission from the WHOI Director of Digital Assets, jdoucette@whoi.edu.

Logging In and Setting Preferences

Log In at top right green button and then choose **Log In with your WHOI Account** (your WHOI email username/password). Choose to **Accept Cookies** (only necessary the first time you log in).

Upon log in you will land on our **Collections** page, which features custom subsets of WHOI-centric items. (If you delve into these, you will need to go back and deselect them to return to your full site access, so leave these alone for this intro.) On the right-hand side of the top blue bar select the human silhouette icon to adjust **Your Account Details** to set your viewing **Preferences** to 100. Try out the other preferences at your leisure, but for this intro please keep the rest of the System Defaults in place. Choose the green **Update** button. From the left side panel, select **Back to Site**.

Viewing, Sorting and Downloading a Single Item

On the blue left side panel, choose **View Folders** to see the most recently uploaded batches of items. The most recent folder uploaded is at the top left. Select a folder by single clicking it, and photo thumbnails of items in it will appear in the default sort order (Date of Upload, Most Recent First). You can change the thumbnail sorting order using the ⬇️A/Z action button in the navigation bar just above the thumbnails on the right. If you choose the **Manually Sort** option, the thumbnails in your opened folder will initially adjust to the order created, and you can also drag the thumbnails around into a customized order. Once you **Save** that new customized order it will become your **Preferred Sort Order**, available to you in the future in your sorting options in this folder. To view the thumbnails sequentially in their uploaded order, select **Date of Upload (Most Recent Last)**.

To view details of a single item, select it once at its thumbnail's center. The detail tabs will reveal the item's **Main** metadata, its **Digital** original file specs, and its **Usage** history (available only if it's been downloaded for use). To **Download** a single item, choose the **Download** action button in the navigation bar, follow the system prompts, and the item will be downloaded to your computer in its default format (**Original File, Without WHOI watermark**). The other formats available feature a WHOI logo watermark overlay, intended for sharing externally to WHOI. Go back to your thumbnails view by selecting the **folder icon** at left in the navigation bar.

Searching and Selecting

The simple **search** field is at the top right of the page, and it's generally used for a unique term or name. This search will comb through ALL of the metadata associated with items, folders, and even lightbox titles. For a more focused search, choose **Field Search** at the left side panel. At the top of that page of fields there is the option to **Select Item Type** which will determine whether you search the system **Folders** metadata or metadata fields for individual **Items**. The fields will change with this choice.

Enter your search term(s) in the appropriate field(s) and select the **Return** key or select the green **Search** button below. Your results will be either a set of folders or a set of individual items depending on the **Item Type** you selected at the top.

When you roll over an individual thumbnail, its selection box will appear for choosing single items. This will also reveal the item file size and type, along with the date it was uploaded into the system. Click that item's box in the top left to select it. To choose several thumbnails in a row (either across or across-and-down a page) simply click and drag over the center of the first thumbnail you want to choose and drag across or across-down the page of thumbnails—you'll see the selection boxes getting checked along the way. To deselect simply click on an individual item's checked box OR choose the blank **Clear Selected** box in the navigation bar, this will deselect all of them. Here you can also choose the **Select All** check box to select all the thumbnails on your full page of view—but only one page at a time. If your search results add up to more than a single viewing page, you'll need to scroll to the next page and then **Select All** again to include those items in your set.

You'll notice that as you select thumbnails, they will populate the **Selections** bar down at the bottom of the page where you have another set of action buttons above your items. Most notably, as WHOI staff members, you can **Download** your selection of items (**up to 50 items at a time**). Review the other action buttons available to you in the **Selections** bar, such as to **Print** a PDF file of your selections to potentially send to non-users of the system. You can also clear this **Selections** bar by choosing the eraser icon at the left side of your action buttons to **Clear All** of your items. Or you can hover over the items one at a time and choose their minus sign that will delete them from your **Selections** bar.

Subject Search is a keyword search with an extensive hierarchy of WHOI-centric terms. Select any number of subjects and hit your **Return** key or select the green **Search Selected Terms** button. The **Location Search** will engage the system's Google GPS data interface and show you numbers of items located in worldwide locations. If the GPS location capability on the camera used was operational at the time of image capture, the system ingests that data tag and features it in the item metadata view. It'll be featured in the lower left section of the item's details view. **Recent Searches** is self-explanatory.

Lightboxes

You can create custom lightboxes for your viewing only, or you can opt to share them with other users. With your selections still in the bar below, hover over the **Add to New Lightbox** action button to reveal **Add to Lightbox**, which we'll review in the next paragraph. For now, choose the default **Add to New Lightbox** to create a new lightbox to put your selection of items in. You'll be prompted to title your lightbox, and since this may be one of several you create you might give some organizational thought to its title. This new lightbox will go into your **Saved Lightboxes** index at the left side panel that only you can view. Once you've created this lightbox, while it's open on your screen, to make it shareable you need to click the **Shared Lightbox** check box just above its thumbnails. Now this lightbox will not only be in your **Saved Lightboxes** index, it will also be in the **Shared Lightboxes** index, which is available for all users. In the **Details** button above the thumbnails, you can alternatively choose to **Share** it with other users by sending them a **Shareable Link**.

To add your chosen **Selections** to an existing lightbox, hover over the **Lightbox** button to reveal the **Add to Lightbox** action. Enter a search word that is part of the title of the existing lightbox you're targeting and lightbox title options will appear as you enter one word or more. Once your target lightbox title appears, choose it and your items will immediately go into that lightbox. NOTE: you are only moving copies of items into lightboxes, you are not moving or deleting the original files.

Please don't hesitate to contact your system administrator (Jayne Doucette, Director of Digital Assets at jdoucette@whoi.edu) for any questions or for additional system usage info.

Three quick searching exercises:

1) Select **Field Search** and using a **Digital Item** type of search, in the item **Type** field choose (Matches) **Video**, then select your **Return** key. Your results will be all of the thumbnails of video files in the system that you have access to. (This may take a few seconds because they're larger files.)

2) Select **Field Search**, **Folder Item** search and in the **Title** field enter the words: **oceanus magazine**, select your **Return** key. Your results will be the folders in the system containing images from the different volumes of the magazine that have been digitized and uploaded (to date). The title of the folder features the magazine volume for further info, but you only need part of the title that you know for your searching effort.

3) Select **Field Search**, **Folder Item** search and in the **Title** field enter the words: **r/v neil armstrong cruise**. Your results will be folders containing items from the Armstrong cruises that have been uploaded into the system. The folder titles contain more detailed cruise information.