



Administration Guide

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Overview

Uview Lite is a subscription based image library platform with IP management control, giving your organisation and clients access to your business brand, images, and design assets. Uview Lite is managed internally by someone within your organisation to administer assets that are ordered from internal and external users.

User accounts are created and managed by your administration team to give access to people who you think will benefit from using your digital assets. These people may include internal staff members, staff members from other branches, or external contractors like graphic designers or design agencies. Uview Lite is our lighter offering of Uview.

Uview Lite offers the following:

- Image Library
- IP manager
- Visual identity
- Online ordering
- Customised reporting
- Customised meta data
- Unlimited users

Uview offers all of the above but also includes:

- Audio & Video library
- Publication file management
- Creative services
- Online proofing
- Project manager
- Production board

Security

Both Uview and Uview Lite are hosted on our local servers in Wellington and are securely managed by a SonicWALL Unified Threat Management Device which features a multi-core architecture that includes a firewall, intrusion prevention system (IPS), application control, network-based anti malware, gateway anti-spam, gateway anti-virus, secure remote access, URL filtering, virtual private network (VPN), and centralized management. This is managed by one of the top IT companies in Wellington.

Any assets you may want to physically archive with us are backed up in Palmerston North, and the website is backed up in Christchurch. All data is backed up every hour.

Trialling Uview Lite

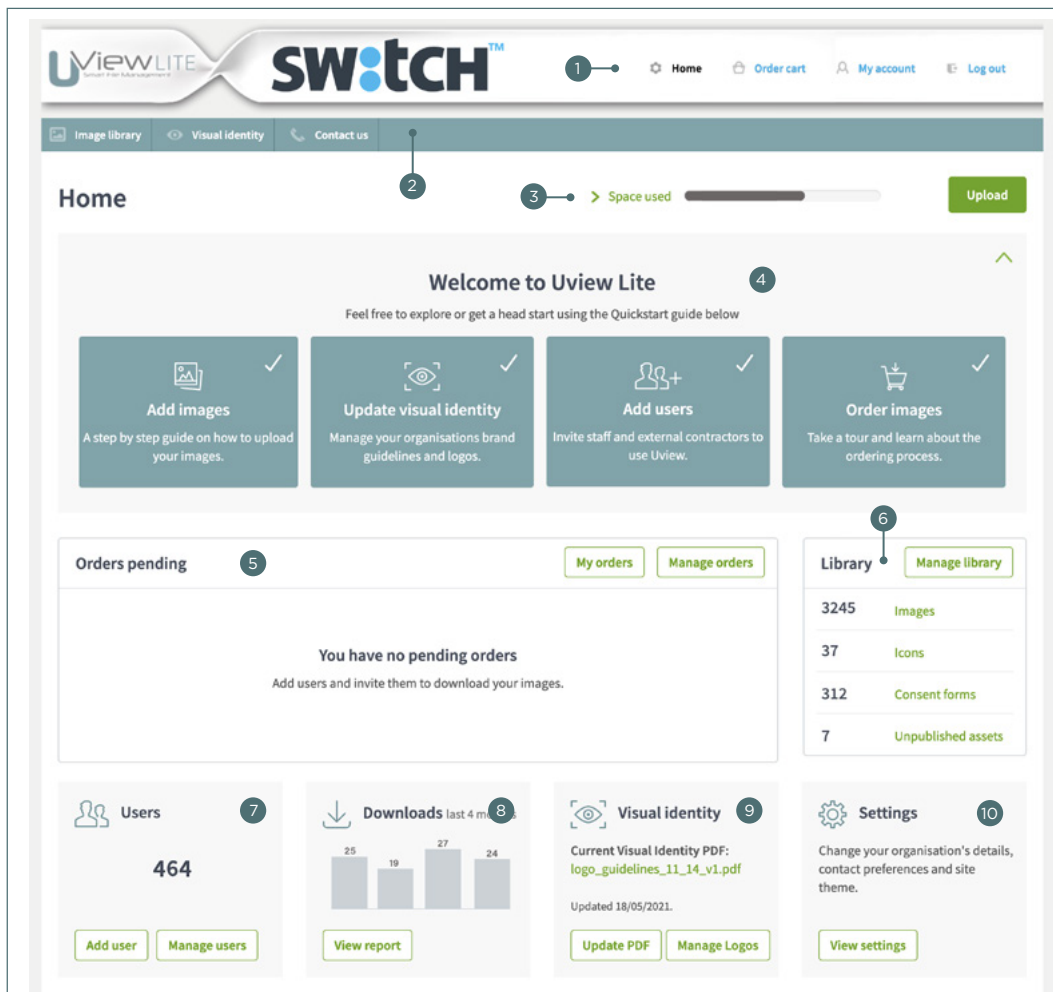
For administrators there is a helpful Quickstart guide to take you through the image uploading and ordering process. There is also this administration guide which you can refer too.

Feel free to create users, order some images, and upload your visual identity. The existing images can be used or removed if you don't wish to use them. The images you will see are there to show you how your own library may look in the future.

To find out more read through the following administration guide.

Home

Your home page is where you can administrator your Uview Lite website. It provides an instant overview of how many users and assets you have, and provides visuals and links so you can easily manage and administer all aspects of your site. Below is a screenshot of how a mature home page will look like, and a breakdown of all the key components.



- 1 **User menu** - the user menu is where you can access your order cart and account details, where you can view your cart, change account details and log out. Only administrators see the 'Home' icon and link.
- 2 **Main menu** - the main menu provides links to your image library, visual identity, and contact us pages.
- 3 **Space used** - information about library assets, and how much space you are using.
- 4 **Quick start guide** - the quick start guide is where new administration users can take a step by step guide through Uview Lite. They will learn how to add images, create and update the visual identity, how to add users, learn about the ordering process, and whats involved as an administrator.
- 5 **Orders pending** - this is where you will find any outstanding orders that need approving.
- 6 **Library** - this library section is a breakdown of all your assets on your Uview Lite website.
- 7 **Users** - showing how many users you currently have, and quick links to add or manage your users.
- 8 **Downloads** - a visual of your users downloads, and a quick link to view a more comprehensive report.
- 9 **Visual identity** - shows the current file used as your visual identity, and quick links to update or manage.
- 10 **Settings** - is where you manage your organisation. Here you can change the theme of your site, add any content management, and update your subscription. (See page 4 for more details).

Settings

Your organisation settings allows you to change the theme of your site, add any content management, opt in or out of the free CC0 images, and update or cancel your subscription. Lets go through the four tabs available in your organisation settings.

Theme

In the theme tab you can customise the top banner that shows along the top of every page. You can add in your own organisation logo, change or add a new head banner, change the menu link colour, and alter the top banner icons to either dark or light.

For your organisation logo it is best to upload a .png file with a transparent background. You can then select which shade of banner colour is going to best suite your logo. If you prefer, you can design and upload your own banner by selecting 'Custom banner design' which will allow you to download an Adobe Photoshop template. When you are ready with your new designed banner you can then return here and upload the .png file.

If you make any changes just remember to click 'save' to lock those changes in.

The screenshot displays the 'Edit Organisation SwitchCo' settings page. At the top, there are navigation links for 'Image library', 'Visual identity', and 'Contact us'. Below this, the breadcrumb 'Home > SwitchCo' is shown. The main heading is 'Edit Organisation SwitchCo'. A tabbed interface is present with 'Theme' selected, and other tabs for 'Content management', 'CC0 images', and 'Subscription'. The 'Theme' section includes the following settings:

- Organisation name ***: A text input field containing 'SwitchCo'.
- Organisation logo**: A preview of the 'switch' logo, followed by a file upload indicator 'switch.png (15.02 KB)' and a 'Remove' button.
- Top banner colour scheme ***: A selection of radio buttons for 'White', 'Light', 'Dark', and 'Custom banner design'. Each option is accompanied by a 'View' button and a corresponding color swatch.
- Top right links colour**: A color picker dropdown menu currently set to blue.
- Top icons**: A dropdown menu currently set to 'Dark'.

A green 'Save' button is located at the bottom right of the settings area.

Content management

The content management tab is where you add user responsibilities by adding in the email addresses of those who will look after incoming image and logo orders, contact us inquiries, and license expiry notifications.

These tasks can all be done by one person, it all depends on the size of your organisation, but we do recommend not to have more than four people approving orders, and to assign these roles to people who work together as a team. You will also need to make sure these users are assigned as administrators when creating accounts for them, or change their user roles in the 'edit users' section so they can receive the email notifications.

The screenshot shows the 'Edit Organisation SwitchCo' page with the 'Content management' tab selected. The page is divided into several sections:

- Contact us email:** A list of email addresses for contact us inquiries. The first address is 'uviewitetest@gmail.com'. There are two empty input fields below it, each with a plus icon to the left. Below the list is a note: 'Who receives the email from the 'contact us' page.' and a green 'Add another item' button.
- Send licence expiry notifications to:** A single input field with a plus icon to the left. Below it is a green 'Add another item' button.
- Send order approval emails for Images to:** A list of email addresses for order approvals. The first address is 'uviewitetest@gmail.com'. There is one empty input field below it with a plus icon to the left. Below the list is a green 'Add another item' button.
- Terms and conditions:** A rich text editor with a toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink, image, unlink image) and a text area. The text area contains the following terms and conditions:

NB: Please be aware of the Term and Conditions below before using our images.

 - All images on this website are 'Copyrighted' and 'Rights managed', any images that are used outside our organisations media must require written permission.
 - Images can only be used within the specified license period.
 - Images should not be stored on user photo libraries.
 - Images cannot be shared between users or third parties.
 - Images can be cropped and manipulated but people's faces should not be covered or obscured by design elements.
 - You agree to discontinue and delete an image from your system when requested.

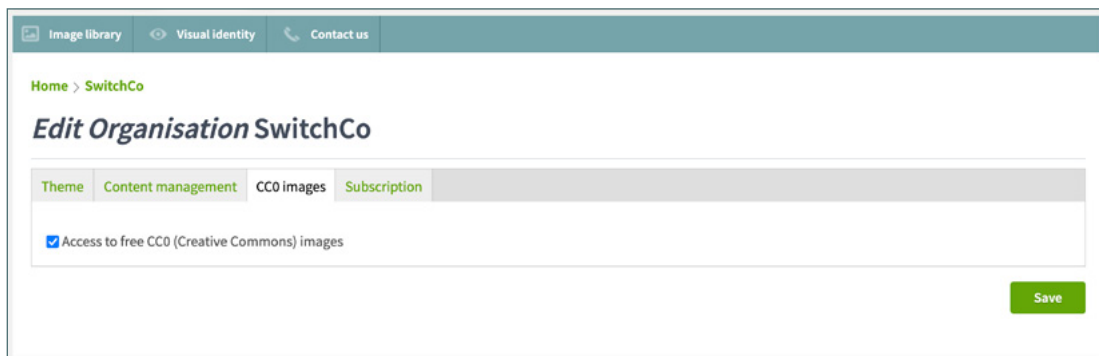
At the bottom of the page, there is a note: 'Text in this field is appended to the order confirmation email and displayed at the top of each order on this web site.' and a green 'Save' button.

The terms and conditions can also be edited, the above text is there by default. These terms and conditions appear when the user is at checkout in the order cart, and they must tick to agree with these terms and conditions before an order is made. The terms and conditions are also visible when the user is about to download their order after it has been approved.

Creative Commons images (CCO)

Your subscription to Uview Lite entitles you to use over 1500 CCO images. These images were sourced from StockSnap and are free to download, free to edit, and free to use for private or commercial use.

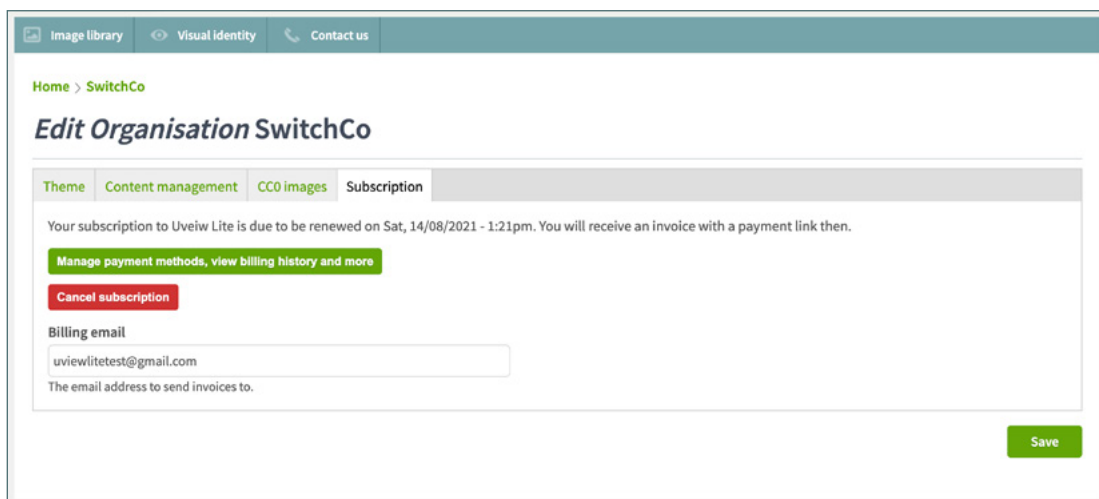
If you feel that these images are not part of your brand, or you simply do not want them available to your users, you can remove the images from your library by un-ticking the below option. For trialling purposes leave this ticked, it will give you a good idea of how the site would look with your own images.



Subscription

All subscriptions and payments are managed via Stripe, <https://stripe.com>. Under the subscriptions tab in your organisations settings there is a link to your Stripe account, where you can manage your payment methods and see all your previous payment and billing history, and more. A cancel subscription button is also available if you wish to cancel your subscription with Uview Lite.

The billing email field is where all payment receipts are sent.

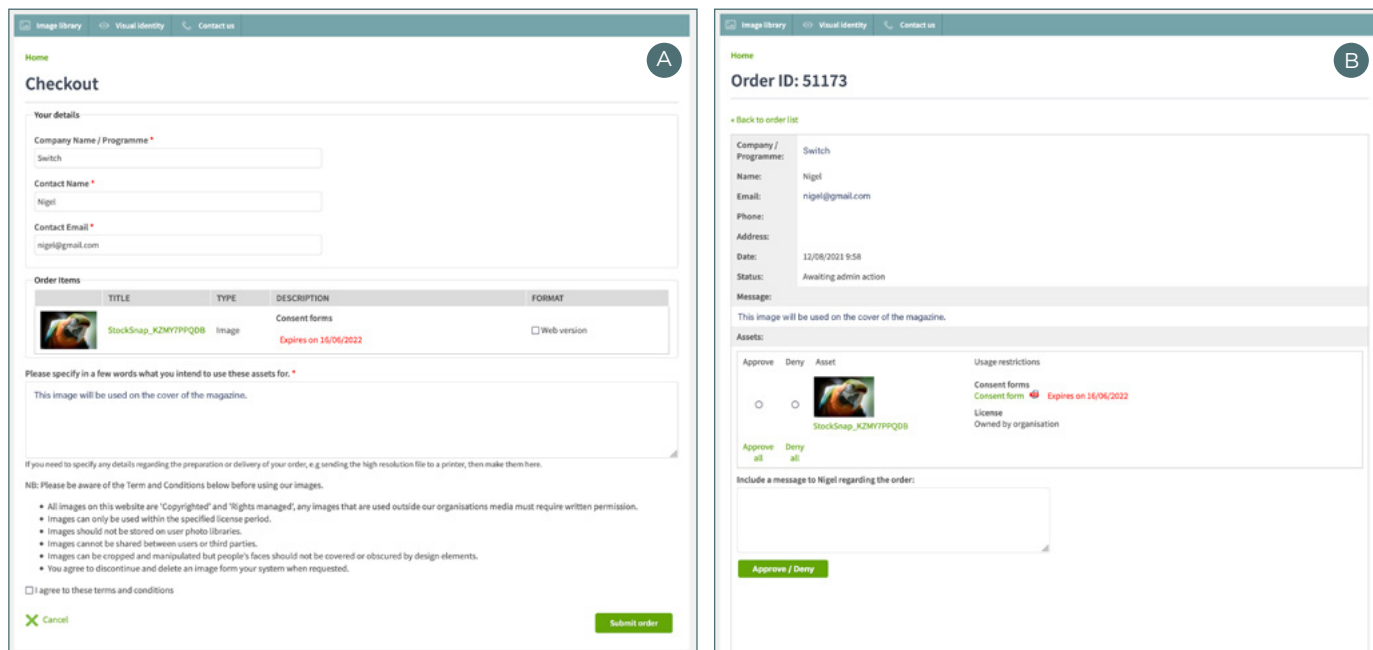


Making and approving orders

Checkout

Once a user has selected what they want to order through the Cart, they then proceed to checkout. At checkout there are some mandatory fields they need to fill out, including company name, contact name and contact email (see image A).

The user must also fill out a field explaining in a few words what they intend to use the images for, and agree to the terms and conditions outlined before they can submit the order.



Once a user has submitted their order the order will show up on the home page and all administrators will be notified. Clicking on the order link will take the administrator to the order to approve, or deny (see image B).

An administrator can see who the orderer is, what organisation they are from, and see what they want the image for. If the image has any IP against the image this will also be displayed, including an expiry date if the consent form tagged to the image has one.

The other thing to note here is the 'extra copyright information'. When you upload an image into Uview Lite there is an option to add any extra copyright information. Extra copyright information could include restrictions on the image itself, for example: "This image may only be used for a company brand identity". This copyright information will also appear in the order so the administrator can make an informed decision.

All information is also included in the email administrators get when an order is placed.

Uploading images

Uploading images is as simple as dragging and dropping, or browsing for the images you want to upload. When the up-loader has finished, you can then click on the 'Categorise' button.

The below window is where you define all the image categories and keywords, any IP, or licensing information, and extra copyright information. (See page 10 for adding consent forms)

When it comes to categories and keywords check each image to make sure it matches the image in question. Uview Lite's image AI systems also works on word recognition, so if it has not recognised an image particular well you may need to remove and replace a few keywords.

Hints:

- If you have a lot of consent forms with a photoshoot, upload them first, it will make it easier to assign them to images later.
- **Do not upload RAW images.** The image you upload will be the image that is received for your clients to use. RAW files are uncompressed images not yet processed and therefore are not ready to be printed or edited. Ask your photographer to provide processed jpeg images.

The screenshot shows the 'Upload images' form in the Uview Lite system. The form is titled 'Upload images' and has a progress indicator: 'Progress: 1. Select type > 2. Upload images > 3. Categorise'. The form includes a photo of a parrot and several input fields: 'Name' (StockSnap_KZMY7PPQDB), 'Photo caption' (1), 'Licensing' (Owned by organisation) (2), 'Extra copyright information' (3), 'Categories' (Animals) (4), and 'Keywords' (birds, parrot, macaw, bird, beak, wildlife, animal, tropical, feather, eye, wing, zoo, feathers) (6). A 'Please read' note states: 'Please read: Categories should be high level concepts that suit your organisation, for example, a corporate brand may have, Business, Technology, Education, Fashion, and People as their main categories. Don't include sub-categories like office, computers, reading, models and staff - use the 'Keywords' field for those. For more see this [uploading guide](#).' There are also checkboxes for 'Use these categories and licensing info for all in this batch' (5) and 'Do not use any of the suggested keywords for this batch' (7). The form has 'Cancel image upload', 'Add more images', and 'Finish' buttons.

- 1 **Photo caption** - add a description of the image here.
- 2 **Licensing** - select which license applies, default is 'Owned by organisation'.
- 3 **Extra copyright information** - add any extra copyright information about the image here.
- 4 **Categories** - categories that have been selected for this image when uploaded, this can be edited.
- 5 **Batch upload** - select this if you are uploading similar images in this batch. It will apply the same licensing, extra copyright information, and categories from the first image and apply to all.
- 6 **Keywords** - keywords that have been selected for this image when uploaded, this can also be edited.
- 7 **Remove suggested keywords** - the suggested keywords do not have to be used, ticking this box will remove the keywords so you can add your own.

Please note: Keep your categories to a minimum. Categories should be high level concepts that suit your organisation. For example, a corporate brand may have, Business, Technology, Education, Fashion, and People as their main categories. Don't include sub-categories like office, computers, reading, models and staff - use the 'Keywords' field for those.

Adding logos

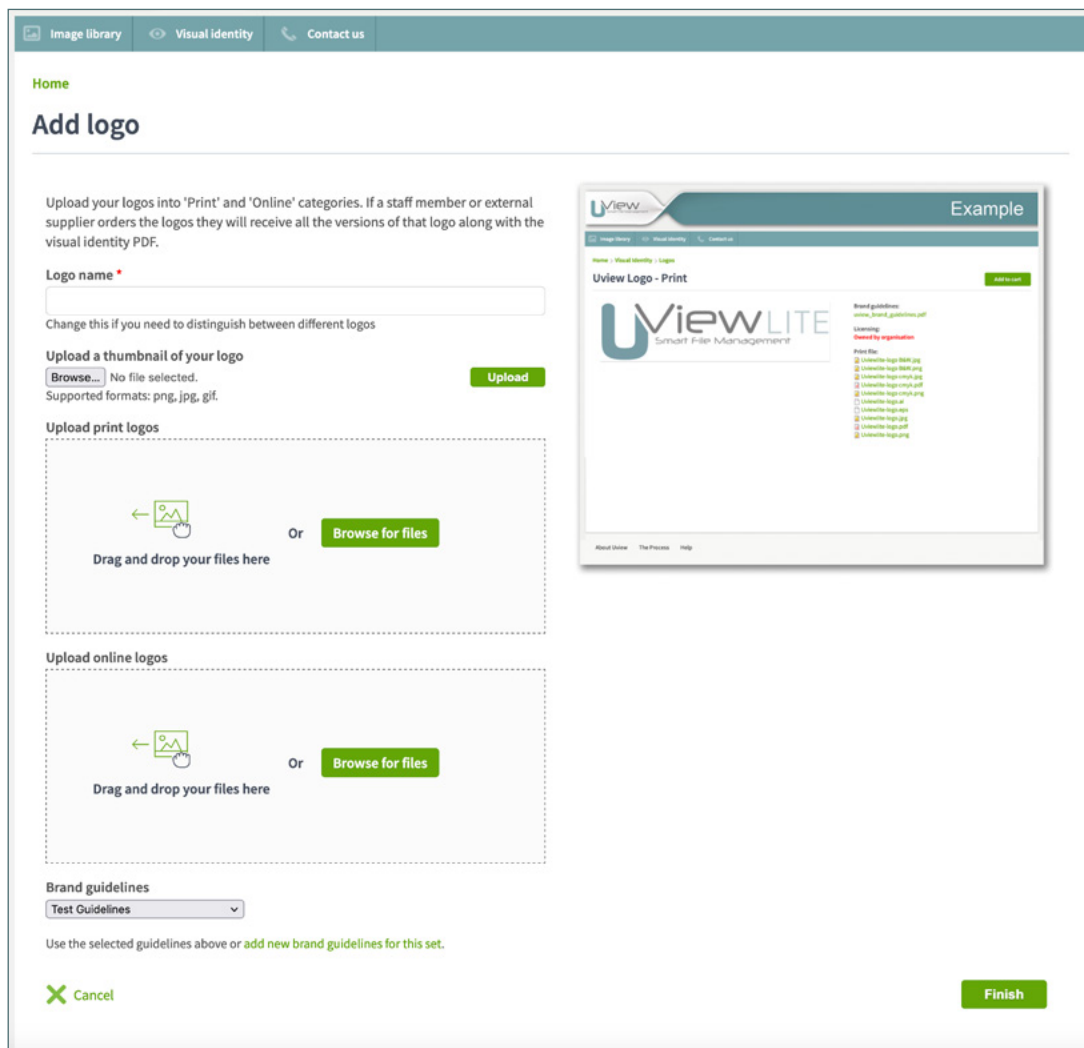
You can access the 'Add logo' page from your 'Home' page. There are a few steps to take to upload a complete set of logos and guidelines, below is a list of what you will need before you start.

You will need to have the following before uploading:

- logo name - the name of the logo set
- logo thumbnail - in the example image you can see the thumbnail image, this is usually no bigger than 600px wide.
- print logos - these are usually CMYK versions of the logo in formats such as .ai, .eps, tif, .psd and .jpg
- online logos - these are usually RGB versions of the logo in formats such as .png and .jpg
- brand guidelines - the brand or visual identity guidelines for the logos. You can select from the current guidelines you already have uploaded, or upload a new guide in .pdf format.
If you do not have any brand guidelines for the set you are uploading, just select 'none' from the menu option.

Once you have finished click the 'Finish' button, and your logos will be available for ordering.

If you did upload brand guidelines with the logo set, the guidelines will be added to the users order. That way, they not only have the logos but the information required on how to use them.



Consent forms

The consent forms page from your main menu is where you upload any consent forms you have for any images that have Intellectual Property (IP). You can upload consent forms as you upload images, but it's a lot easier if you do this here first, that way you can simply tag the consent forms as you upload your images.

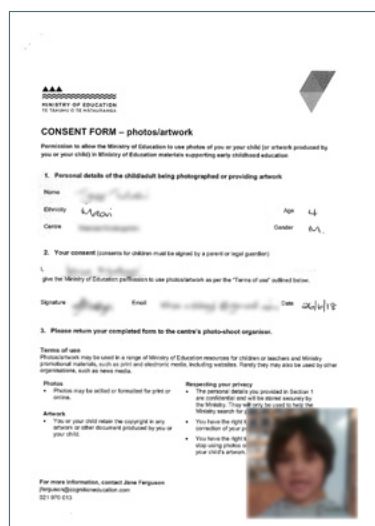
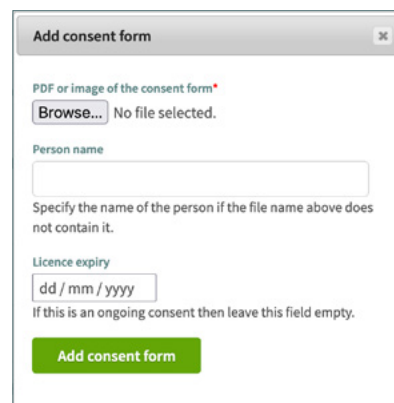
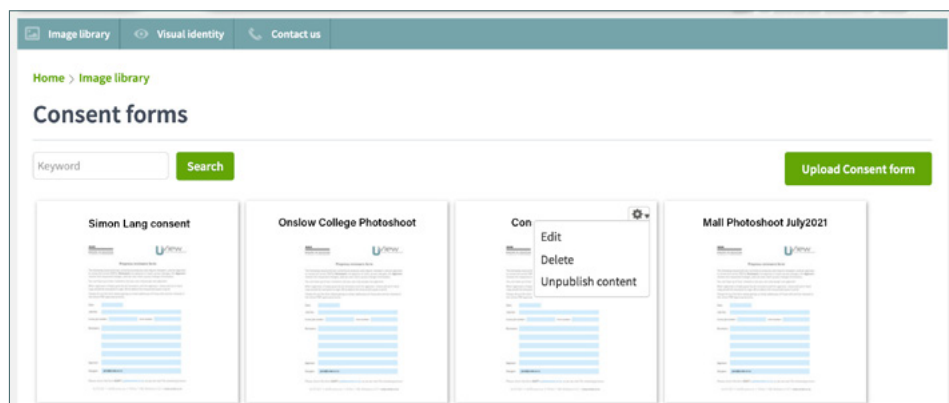
Once uploaded, with each consent you have the option to 'edit', 'delete' or 'unpublish the content'.

- If you select 'edit' you can upload a new consent and/or change the expiry date. All images that are tagged to the consent are then updated with the new information.
- Selecting 'Delete' will permanently delete the entry, and any images tagged will be moved to 'Unpublished assets'.
- If 'Unpublish content' is selected the consent form moves to the unpublished consent forms page, and all images that are tagged with the consent form get moved to 'Unpublished assets'. If the consent form has an expiry date and it expires, this is automatically done.

So what is an unpublished asset?

Images that reside in 'Unpublished assets' become unavailable to your users. Images can be manually put there (it may be an image that is getting ordered to much), or they are images that got moved there because the consent form they were associated with has expired.

Hint: If you have a lot of IP for a photo shoot that involved a lot of people, and you are unsure who is who, collect all the consents and save to one file. For example, 'Kapiti School Photoshoot.pdf', and tag this file to all the images. Just make sure they all share the same licensing and/or expiry date.



As your consent form data base builds you may find at some point that a request comes through to remove all images for a particular person. Having an image of the person on their consent form is good practice when it comes to managing IP.

If you use external external contracted photographers get them to supply the consents like the image on the left, this will help you better manage your resources and will help if an instance like the above ever occurs.

Note: Administrators have access to sensitive and personal IP information. It is the responsibility of your organisation to make sure that those users who are assigned as administrators have been approved internally for this responsibility. Uview cannot be made accountable for any breach of security if a staff member is assigned as an 'administrator' and was found to have abused this privilege.

Creating and managing users

You can access the 'Create new user' page from your 'Home' page. Simply add the persons name and email address, and select what user role you want them to be under.

A guest role has 48hrs access, and with the contractor role you can set how long they have access for. Guest, contractor and staff user roles have access to all images and visual identity. These roles do not have access to the 'Home' page or the consent forms page.

Administrator roles have access to sensitive and personal IP information. It is the responsibility of your organisation to make sure that those users who are assigned as administrators have been approved internally for this responsibility. Uview cannot be made accountable for any breach of security if a staff member is assigned as an 'administrator' and was found to have abused this privilege.

Administrators have full access to the site, including access to subscription information.

Create new user

Name / Login *

Email address *

Role *

- Guest - expires after 48 hours.
- Contractor - expires after some time.
- Staff - default user type
- Administrator - can also access Consent forms. Administrators also have the ability to edit, delete and unpublish images, consent forms and visual identity.

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To manage your users go to 'My colleagues' via the 'manage users' link on the home page. Here you can edit and delete users as they come and go, change their user role, un-expire their orders, and reset their passwords. For security measures you won't know what your users passwords are. If a staff member was to ring to ask what their password is, it's easier just to create a new password for them, and once they are logged in inform them that they can then go to their account profile and change to something thats familiar.

As an administrator you can also 'un-expire' orders. If a colleague was to ring up and mention that they forgot to download their order you can click on the persons name, go to their 'My orders' and un-expire the order that they had made.

My colleagues

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Name Roles

Name	E-MAIL	ROLES	LAST LOGIN	CREATED	EDIT
Simon	simon@yourorganisation.co.nz	Admin	21/8/2021	18/05/2021	edit
Grant	grant@yourorganisation.co.nz	Staff	16/8/2021	18/05/2021	edit
Craig	craig@yourorganisation.co.nz	Staff	2/8/2021	24/06/2021	edit delete
Laura	laura@yourorganisation.co.nz	Staff	15/8/2021	24/06/2021	edit delete
Scott	scott@yourorganisation.co.nz	Staff	15/8/2021	02/07/2021	edit delete

Editing Simon

Name / Login *

Email address *

Password

Confirm password

Manage library

Manage library is where you can make changes to multiple assets at once. If you find that you have made a mistake when uploading, or you want to change licensing or copyright information in bulk, or add/edit a category, you can come here. The process is simple, find the image(s) you want to change, and select from one of the following options:

Title name - select to change how the image name is displayed on the website.

Photo caption - select to change the caption of the image(s).

Licensing - select to change the licensing.

Assign consent - select a consent form you want the ticked images to be associated with. This is helpful if you forgot to tag the consent when uploading.

Copyright information - select to change the copyright information. Remember, if any information is added in this field it adds a “Restricted usage” banner on the image. The image can still be ordered, it just informs the user that there is extra IP information they need to be aware of.

Category - select to change what category you want the image or images to fall under. If you want to edit a category name, or add new categories click on the “manage categories” link. To learn more about categories go to the uploading section on page 8.

Keywords - here you can replace all the keywords that are associated with the image or images.

Unpublish - selecting this will move all the images selected to the un-published section. See more about un-published assets on page 10.

Delete - selecting this will delete the image(s) selected.

The screenshot shows the 'Manage assets' interface. At the top, there are navigation links for 'Image library', 'Visual identity', and 'Contact us'. Below this is a 'Home' breadcrumb and a 'Manage categories' button. The main section has search filters for 'Type' (set to 'Image'), 'Category' (set to 'Any category'), and 'Keyword' (set to 'Keyword'). There are 'Search' and 'Reset' buttons. Below the filters is an 'Operations' section with buttons for 'Title name', 'Photo caption', 'Licensing', 'Assign consent', 'Copyright info', 'Category', 'Keywords', 'Unpublish', and 'Delete'. The main content is a table with the following columns: 'IMAGE', 'TITLE', 'BODY', 'TYPE', 'UPDATED', 'PUBLISHED', 'EDIT LINK', and 'DELETE LINK'. The table contains five rows of image assets, each with a checkbox, a small image thumbnail, a title (e.g., 'A26I9041'), a body field, a type of 'Image', an updated date of '29/11/2021 - 1:22pm', a 'Published' status, and 'edit' and 'delete' links.

<input type="checkbox"/>	IMAGE	TITLE	BODY	TYPE	UPDATED	PUBLISHED	EDIT LINK	DELETE LINK
<input type="checkbox"/>		A26I9041		Image	29/11/2021 - 1:22pm	Published	edit	delete
<input type="checkbox"/>		A26I9039		Image	29/11/2021 - 1:22pm	Published	edit	delete
<input type="checkbox"/>		A26I9036		Image	29/11/2021 - 1:22pm	Published	edit	delete
<input type="checkbox"/>		A26I9017		Image	29/11/2021 - 1:22pm	Published	edit	delete
<input type="checkbox"/>		A26I9022		Image	29/11/2021 - 1:22pm	Published	edit	delete

Take your time and be as accurate as possible when doing the initial uploading and you shouldn't need to use the manage library section, but it's nice to know you have any area to come to if you have made a mistake.

Visual identity

Your visual identity page gives your users access to your brand and links to your logos. A brand statement is also available for your users to read.

Brand statements are becoming more popular as it allows a business to explain to all users where they see their company heading, and what is important to the company. This could include a statement on the environment and how it is important to the business that the companies brand is kept in line with environmental concerns.

A brand statement in short is a summary of what you do, how you do it, and what makes the way you do it unique. This will give your users help to better understand what you're about.

Only administrators have the ability to edit and update any of this information.

