ResourceSpace

User Guide - Administrators

Metadata

Metadata is how users find and interact with the resources in a ResourceSpace system. It's not only what describes your resources but also what forms the basis of your search.

When a resource is uploaded into ResourceSpace it is tagged with words, phrases or dates that describe the asset. It should be descriptive, clear and complete. These tags form the resource metadata and that's how users will search for the resources they need.

Files aren't uploading into a specific location - searching relies entirely on metadata.

Getting the best possible metadata into your system will make searching for resources faster, easier and more efficient.

Searching

The simple search panel sits on the right of every page - this makes it easy to search from anywhere in the system.

The panel features a general search box for free text searching along with a resource type selector. Extra metadata fields may show on the panel so that users can refine their search.

A link to the advanced search page can be found under the simple search. It provides access to a wider selection of metadata fields so users can run more specific searches. Depending on your permissions there's also the functionality to search across different workflow states in the advanced search - the simple search will only ever return active resources.

There are also special searches to extend your keyword searches, you find out more and watch a video here:
https://www.resourcespace.com/knowledge-base/user/special-search-terms

ResourceSpace

Downloading

Once you've found the resource you want to download, click on the thumbnail to open it and use the blue download button.

Sometimes users may see a blue request button in its place. This allows them to send a request to the administrators of the system to download the resource - and they'll be notified when the request is approved or not. Some resources might be restricted completely - these will be marked with 'Restricted' where the download button would normally be.

User Resource Requests

Administrators are notified about resource requests in their 'Actions'. Once the request is open you'll have the option to approve it or decline it - and this will send a notification to the user letting them know your decision.

Uploading

You can choose from two methods when uploading. You can either upload your files then add the metadata or you can add the metadata first and then upload the files.

If you're uploading several images at once it's best to upload the files first. You can change the upload method by going to the person icon > preferences > upload sequence.

To start a new upload use the blue 'Upload' button in the header - once you've added your files and metadata your resources will be active on the system straight away.

There's further information and a video about uploading here:
https://www.resourcespace.com/knowledge-base/user/uploading

Pending Review

Some user groups will upload into 'Pending review'. This means their contributions will be sent to administrators to review before they are made active on the system.

You'll receive a notification to review new resources in your 'Actions' menu. You can use the blue workflow buttons to make it active or to send it back to the user to make further changes. They'll be notified when the resource is back with them.

Collections

A collection can be made from a set of search results or by grouping together individual resources that you want easy access to.

You can create a new collection in your collection bar at the bottom of the page. Once you've selected the collection you want to use, you can use the '+' symbol on resource thumbnails to add them to your collection. You can create as many collections as you want and add as many resources as you like - they'll still appear on the system for other users.

Featured collections are set up by administrators and can be accessed through the header bar. They are intended for promoting selected resources.

Sharing

Resources can be shared individually or in collections with other users or with external contacts. A URL is generated to link to the resources which means even large collections can be shared easily.

There's more information and a video on sharing resources here:
https://www.resourcespace.com/knowledge-base/user/sharing-resources

ResourceSpace

Account Requests

You may receive notifications for a new user account in your messages.

To create a new account you need to go to the admin menu > users > create new user. You'll need to add a username, email address and full name as well as suggesting a password and choosing which user group they belong to.

Before you click 'Save' make sure you tick the box to send an email to the user so they can reset their password.

You can find more information and videos about ResourceSpace on our KnowledgeBase: https://www.resourcespace.com/knowledge-base/user/

Quick guide - administrator functions

To change the user group of an existing user: admin menu > users > search user > click on username > edit user group from dropdown field > save.

To check user group permissions: admin menu > system > user groups > select group > launch permissions manager.

To review/edit/create metadata fields: admin menu > system > metadata fields. Select field to edit or add field name in the create field.

To run admin reports: admin menu > reports > choose report and timeframe > view or download.
You're also able to set up periodic emails of your reports for yourself or a user group.

You can find more information and videos on our KnowledgeBase:

https://www.resourcespace.com/knowledge-base/resourceadmin/
https://www.resourcespace.com/knowledge-base/user/