# Module 3 - Downloading and Sharing

*Downloading* a file involves taking a physical copy of the file from IMS onto your PC or network: IMS enables you to download the full file or to reformat, crop and resize files quickly for their intended use (saving potentially costly editing time and resource). Sharing a file is a way of providing access to a file without the need to create a physical copy: an Intelligent Media Server provides several ways to do this. For example, you can post a link to a file on Twitter and followers can access it on the link without having to login to or work with IMS - they just get to see/hear the file. Another way of making files available to others is publishing: this is a means of embedding image, video and audio files in website, and intranet pages and HTML emails without having to download a copy from IMS. This feature is accessible through Advanced Options / the Download Wizard where you can also use the reformatting, cropping and resizing options available with downloads.

**Single-click downloads**

The fastest way to download a file be it the full-size original file or re-sized version of a file.

Single-click download options are available when browsing files in a folder, lightbox or search results: hover over the file you want to download and right–click. The right-click menu provides access to single-click download of the full-size Original File.

Single-click download options are also available when you open a file in the File Console: click the Download drop down menu immediately beneath the preview image and use the Original File option or one of the predefined formats presented.

**Automatically Resize to Predefined Formats**

When you download files from IMS you can reformat and resize them automatically with just one click, by selecting from a list of predefined 'download sizes'. This can help enable non-technical staff to reformat file quickly and easily and hence save your organisation a lot of time and effort which can be spent by specialists reformatting files manually. You can modify the sizes we supply and create new download sizes to suit your organisation's needs.

**Modify an Existing Category**

1. Login as an Administrator

2. Select **Configuration > Download Categories** from the main menu. A list of all Download Categories is displayed (*Books* and *Magazines*, for example) and in each category the available size settings (*Cover* and *Author Photo* for example).

3. Click on a category to open it and adjust the settings as required.

4. Complete the Edit Category Popup as required.

**Create a New Download Category**

1. Login as an Administrator

2. Select **Configuration > Download Categories** from the main menu. A list of all Download Categories is displayed (*Books* and *Magazines*, for example) and in each category the available size settings (*Cover* and *Author Photo* for example).

3. Select the **Add New category** button.

4. Complete the [Edit Category Popup](#) as required.

**Download Wizard**

The Download Wizard provides access through one dialogue to all of the download options available to you. It enables you to choose options for the formatting and size of the file(s) you want to download – including cropping the file - rather than downloading the full size original or selecting a predefined format. It also provides access to all predefined download sizes so that you can select one of those as the base from which to select how you want to download a file rather than using the Original File settings (the default). Finally, you can publish a file to a URL using the formatting and size options you have specified.
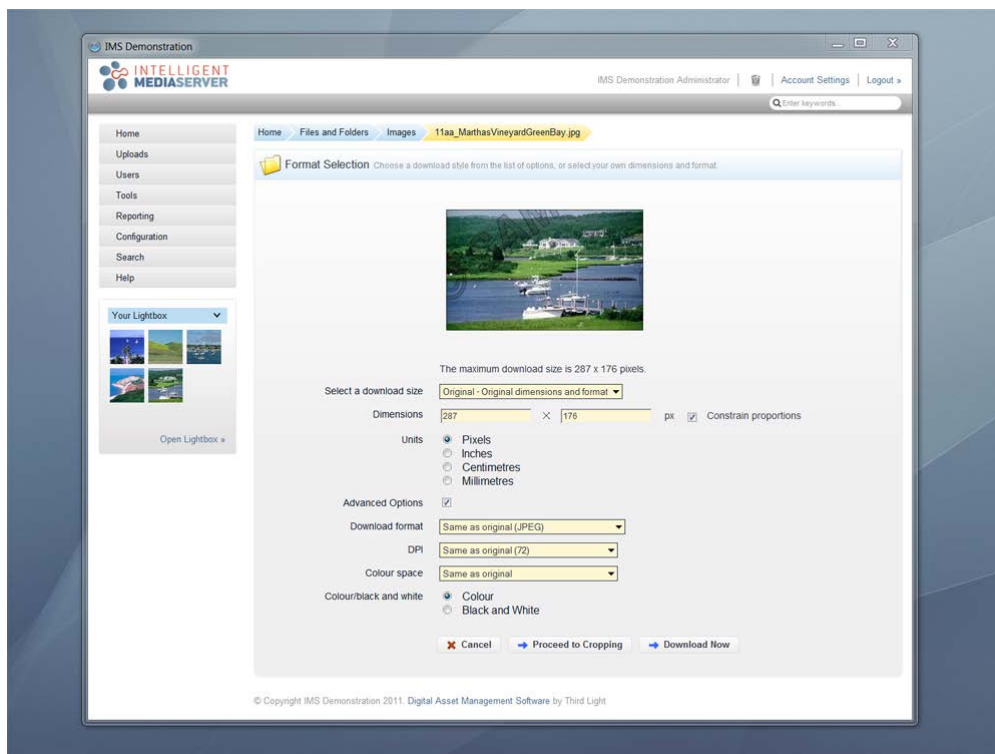


**Publish to URL**

When a file is published to a URL it can be accessed directly from a browser or email client without the need to create a copy of the file. This is a useful tool to help you manage use of assets across your websites and marketing campaigns. There is no need to download a physical copy of a file or to keep a physical copy on the webserver – all the photos, videos and audio files your website needs can be kept in IMS, published to a URL and the link embedded in your website and/or intranet pages and HTML emails. You can also reformat/crop files within IMS before making them available on a URL (without affecting the master).

**Expiry and Embargo Dates**

You can specify the period of time during which a published file is available on the published URL.

Embargo date: Date from which the file becomes available
Expiry date: Date from which the file is no longer available

You can change either of these dates and hence change the availability of the file at any time.

**Sharing**

Lightboxes and conversations
Facebook
Twitter
Dropbox
Via e-mail

**Lightboxes**

Lightboxes provide clipboards onto which you can drop files from any Folder, with a single click. They are a convenient way to gather a selection of Files together and work on them as a group, without having to move around Folders or move Files from the Folders in which they are normally kept.

Lightboxes contain links to Files in Folders. In this way the same File can be present in multiple Lightboxes but physically exist only once.

The Lightbox panel, containing thumbnails of the Files in a Lightbox, is permanently available on the page as you move around your IMS Library. You can create multiple Lightboxes, let other users look at the content of a Lightbox (sharing) and chat about it online (using the conversations feature).

Lightboxes are saved automatically and retained until you delete them. When you logout of IMS, Files added to your Lightbox will be available when you next login.

By default you have a Lightbox called **My Lightbox** to which you can add files as described below. You can also create multiple Lightboxes and give them names of your choice. Administrators can edit Lightboxes created by any other users.

**Add Single Files**

If you have more than one Lightbox ensure that the one to which you want to add the Files is open

1. Open a Folder and hover over the thumbnail image of the File you want to add

2. Right-click your mouse and select **Add to Lightbox** or, click on the *Add to Lightbox* button that appears in the toolbox beside the file.
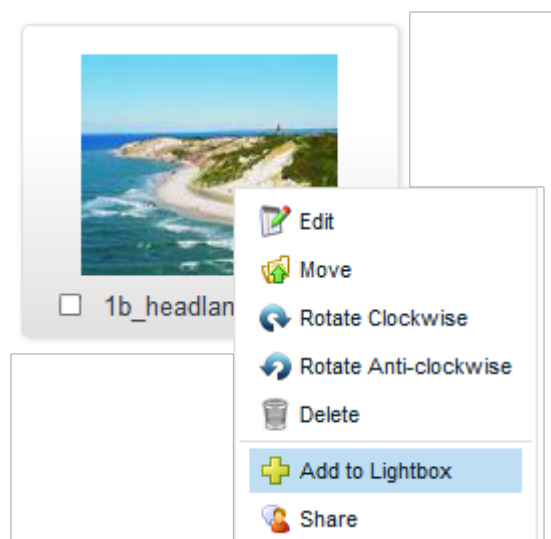
Files added to the open Lightbox are visible in the Lightbox panel and are also indicated by the placement of a lightbulb icon 💡 in the bottom-left corner of thumbnail images.

**Add Multiple Files**

1. If you have more than one Lightbox ensure that the one to which you want to add the Files is open.

2. Open a Folder

3. If you want to add only some of Files in the Folder to the Lightbox:

   Click the ☑ selection box beside each of the Files you want to add to the Lightbox
   Click ➕ Add to Lightbox.

4. If you want to add most of the Files in the Folder to the Lightbox:

   Click **Select All** in the Actions menu
   Uncheck the ☑ selection box beside each of the files that you don't want to add to the Lightbox
   Click ➕**Add to Lightbox** in the Actions menu

5. Open as many Folders and add as many file to the Lightbox as required.

**Sharing a Lightbox**

You can enable other users to look at the contents of a Lightbox: they are automatically sent an online message from you or - if they are not logged into your IMS Library at the time - an email alert message and the Lightbox you share becomes available to those users via their own Lightbox menu, under the heading **Lightboxes shared with you**. The online messaging or conversation feature means you can chat online and invite as many users as you like in the conversation. You can also draw others attention to particular files by flagging them.

1. Ensure the Lightbox you want to share is open

2. Click the downward arrow at the top of the Lightbox ⌄

3. Select **Share** 🧑Share▾ The Lightbox page opens with several options

4. **Subject** This will show the name you have already assigned to the Lightbox. You can take the opportunity to change the name: doing so does not affect the content or access by the people with whom you have shared in any way other than the name changing. You may want to add a message to the effect you have changed the name, to avoid any confusion.

5. **Add People** Click inside the *Add People* box to add users or email addresses. A list of users will be provided so you can select the users you want. You can also add recipients that do not have login access to your IMS - just key in their email address - refer to Share with External Users below for more details about how you can control what permissions those without an IMS account are given.

6. Enter a message into the Add Message box: a message you enter here will be sent to all the people with whom you have shared the Lightbox

7. Select **Update Lightbox**.

**Add People**

You can add new sharers at any time: open the Lightbox and click the *Add people* button. People you add are able to see all the messages sent before the Lightbox was shared with them, as well as new ones.

You are also given the opportunity to send a message that goes to the users you add only and not to the others already sharing the Lightbox. You can use this 'private' message to summarise the conversation to date for example without repeating it for all the other sharers who were party to it. The private message does not become part of the general conversation all the sharers can see.

**Remove People**

You can remove access to your Lightbox from any of the sharers at any time.

1. Open the Lightbox

2. Locate the sharers name among the names displayed across the top of the Conversation box

3. Click the downward arrow icon beside the name ⌄

4. Click the Remove button.

The user will no longer have access to the content of the Lightbox or associated messages.

**Flag a File in a Lightbox**

You can 'flag' files in a Lightbox to highlight and draw particular attention to them. Flagged files are added to the Flagged Files box with the name of the person that flagged them, so others can quickly see which files have been flagged and who flagged which files.

To flag a file, click the flag icon located on the thumbnail of the file you want to highlight. When you flag a file the flag icon turns from grey ⚐ to blue. ⚑

To unflag a file, click the flag icon located on the thumbnail of the file you want to highlight. When you unflag a file the flag icon turns from blue ⚐ to grey. ⚐

For example, you might send 10 files to a reviewer indicating that they are candidates for use in a forthcoming publication and flag the 5 files you prefer: click on the thumbnail to the right of this paragraph to see what this would look like. When you flag a file the flag icon turns from grey. You might unflag a file in response to comments you receive from others: so a Lightbox can work as a tool to process review and agreement cycles in a publication production cycle.

**Galleries and events**

The Gallery enables you to make selected parts of your IMS Library public. The Gallery is presented on the front page of your IMS Library as a folder or several folders that visitors can open and browse without the need to login.
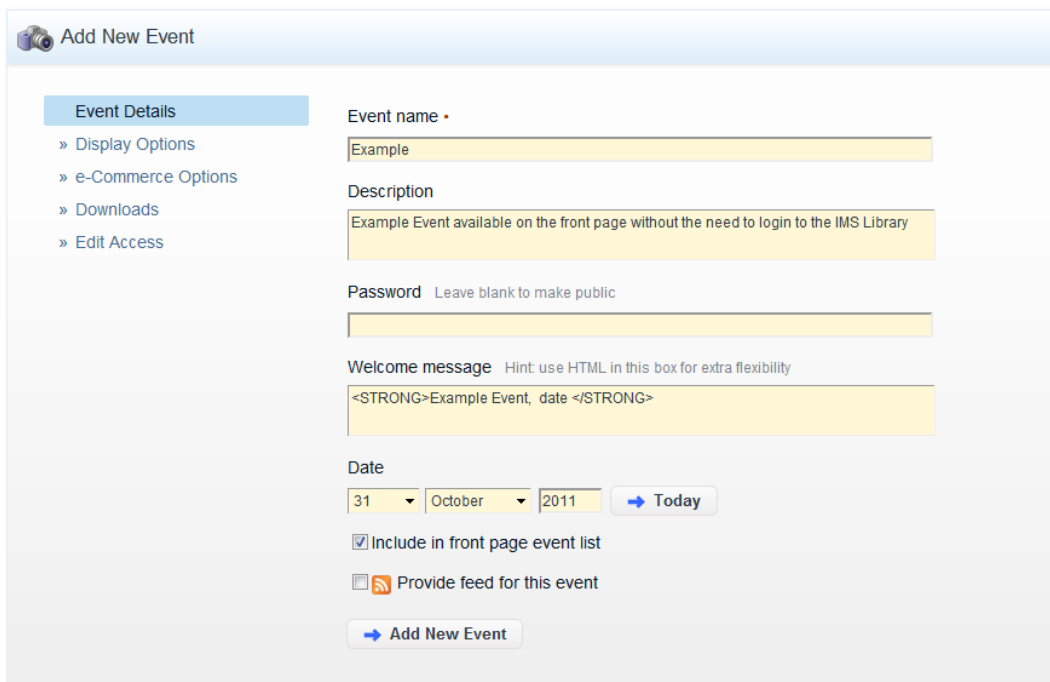
Files included in the Gallery must already exist in a Folder, Smart Folder or Collection - you cannot upload from external systems directly to the Gallery.

When accessed via the Gallery, Files are subject to the settings for the Gallery (such as the order in which it is displayed with other Files, the caption, availability of metadata etc.).

**Events**

Events enable you to make selected parts of your IMS Library public. An Event is a folder accessible on the front page of your IMS Library that visitors can open and browse without the need to login to the Library.

Files included in an Event must already exist in a Folder, Smart Folder or Collection - you cannot upload from external systems directly to an Event.

When accessed via the Event, Files are subject to the settings for the Event (such as the order in which it is displayed with other Files, the caption, availability of metadata etc.). You can create as many Events as you like and specify if assets can be downloaded, purchased, accessed only via a password and if an RSS news feed is available to notify users when new content is added to an Event.

The essential difference between the Gallery and Events (also designed to be viewed from the front page without the need to login) is that the there is no provision to limit access to it using password protection, no RSS news feeds and no downloading. It is designed to be public, and provides a simple way to make assets available to anyone who visits your IMS Library front page.