

# HAL user manual

Habitat for Humanity Asset Library



Version 1, 31<sup>st</sup> March 2011

## HAL at a glance

- Intuitive interface – a visually rich, user focused interface to support you in accessing and organising resources.
- Simple and advanced search – the main search panel is available on every page allowing quick access to the resources while the comprehensive *advanced search* lets you focus your search and find the exact resource you are looking for. Use the ‘search for similar’ panel to find other resources based on those you have already found.
- Resources – detailed resource information, thumbnails, stories, detailed visual previews and streaming video help you find the best and most relevant resources.
- Direct access to resources – resources can be downloaded to your computer in a variety of sizes from high quality print files to screen resolution files.
- Themes – groups of our very best resources selected by the HAL team, which focus on the latest themes or showcase projects and ideas.
- Organisation, collaboration and distribution – tools to organise your resources, share with colleagues on group projects and distribute to others.
- Archiving– access the archives.

## Quick guide

- 1) Log in – Navigate to [hal.habitatforhumanity.org.uk](http://hal.habitatforhumanity.org.uk) and enter your username and password (both are case-sensitive)
- 2) Search for resources using the Search Panel to the right of the work space, or select advanced search from the panel.
- 3) View resources you find using the search engine, themes, or browsing ‘recent’, and click on a thumbnail to see the resource details and download options.
- 4) Upload a resource by going to ‘upload’ in the main menu at the top of the screen.
- 5) View, edit or create new collections by using the panel at the bottom of every screen or the option on the home page.
- 6) Download a resource you have found through searching, and enter how you intend to use the resource into the empty boxes.
- 7) Log out using the ‘log out’ option in the main menu

## What’s in HAL?

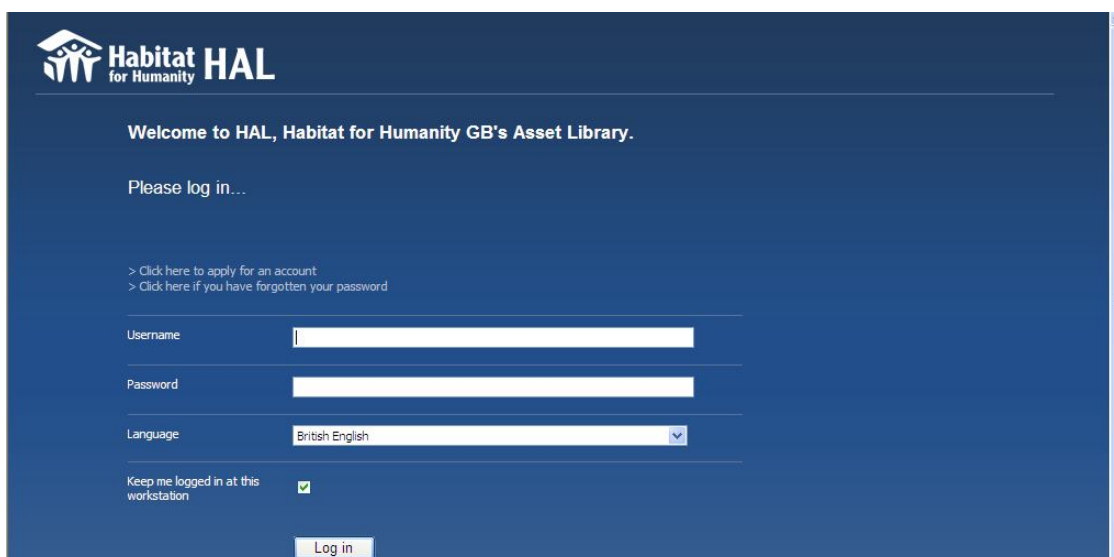
- Photographs from projects, homepartner stories, GV trips, GB fundraising events etc.
- Videos – footage sent in from the field, from GV trips, homepartner stories and GB fundraising events etc.
- Documents – stories and interviews with homepartners and volunteers etc
- Audio (coming soon!) – sound tracks, interviews etc.

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## How to access HAL

HAL is a web-based system available from any computer with internet access. Just go to [hal.habitatforhumanity.org.uk](http://hal.habitatforhumanity.org.uk)

- Log in – First you must log in to HAL. Every user has a unique username and password. This keeps the system secure and gives you access to your previously saved resource collections, shared projects, and any research work you may have requested from the team. Passwords and usernames are case sensitive.
- Password reminder – If you can't remember your password, you can ask for a reminder to be sent by email from this same screen. You will be instructed to enter your email address.
- Apply for an account - If you haven't been registered and haven't got a username and password, you can request an account from the login screen.
- Home – when you log in to HAL you will see the home page, from where you can start searching or access other tools
- Change password – after logging in, click on your name in the main menu and follow the instructions
- Log out – when you have finished using the system, remember to log out (in the top right hand corner), especially if others have access to your computer.

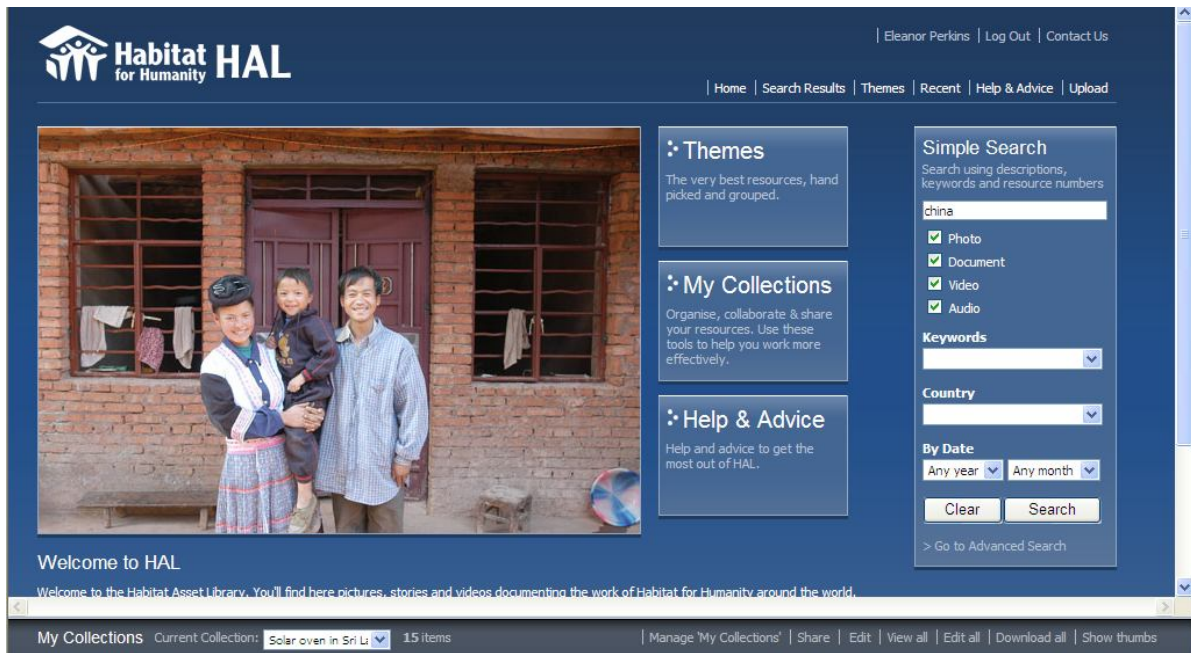
The image shows a screenshot of the HAL login page. At the top left is the Habitat for Humanity logo and the text 'Habitat HAL for Humanity'. Below this is a welcome message: 'Welcome to HAL, Habitat for Humanity GB's Asset Library.' The main heading is 'Please log in...'. There are two links: '> Click here to apply for an account' and '> Click here if you have forgotten your password'. The login form includes fields for 'Username', 'Password', and 'Language' (set to 'British English'). There is a checkbox for 'Keep me logged in at this workstation' which is checked. A 'Log in' button is at the bottom.

## HAL Workspace

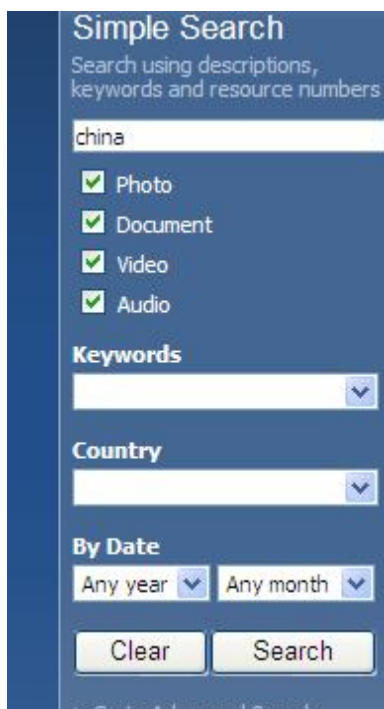
The *HAL* workspace is laid out to give access to all the tools and features of the system. It expands to fit the full width of your browser, so make sure you expand the window to fit your full screen in order to ensure you get the best out of HAL.

The workspace consists of:

- The main menu – access all the areas of resource space (i.e. Home, Search Results, Themes, Recent, Help & Advice, Upload), in the top right-hand corner
- The work area – this is the main area of the screen and changes depending on what you are doing.
- The Resource Search panel – quickly find resources or access the advanced search. The Search panel is always displayed along the right-hand side.
- The My Collections panel – at the bottom of the screen, and contains resources that you have bookmarked.



## How to find a resource



### The Resource Search panel

The Resource Search panel appears to the right of every screen and gives access to the HAL search engine. This is the main way that you will find the resources you need. You can enter text to quickly search by keywords, names, codes or ID numbers, as well as selecting other options such as resource type, country and date.

You can access the Advanced Search page from this panel.

The resources in HAL have been comprehensively categorised, and the search engine will search through *all* data attached to each resource. If you type more than one word in the search engine will find all the resources that match all of these resources. For example if you type in "Homepartner garden" into the search engine it will only resources that contain both these words.

You can choose other options to further refine your search and return more accurate results.

If HAL is unable to find any resources, it will suggest another word to help you.

Every single resource has a unique ID. If you know a particular resource ID you can go straight to it by typing that ID in the text box and clicking search.

You can use one or more of any of the fields to begin your search with.

- Text box – typing in this box will find the word wherever it appears, and will give you the broadest search.
- Resource type – select photo/document/video/audio to refine your search
- Keywords – select a keyword from the fixed list which the resources have been tagged with.

- Country – choose the country from the list.
- By date – you can use this to find photos from a particular date.

Example: If you want to find a photograph of a child, there are a number of ways you can do this. If you type 'child' into the top box, this will find all occurrences of the word 'child' in every single resource in HAL. This includes captions of photographs which do not necessarily have a child in them. If you select the keyword 'children' from the list of keywords, you will find only the resources which have 'children' in their list of keywords.

## Advanced Search

Access advanced search from the bottom of the Resource Search panel. Advanced Search allows you to search all the specific categories and data attached to every resource individually.

By using this form it is possible to carry out very detailed searches, targeting the specific data of each resource.

For example, you can search for 'construction' – area: 'AME' – country: 'Ethiopia' – keywords: 'smile' – includes homepartner: 'yes' and find just a few targeted resources.

Any section of the form that you leave blank or unticked will include all those terms in the search.

For example, if you leave all the country tick boxes empty, the search engine assumes you don't wish to target any particular country and leaves it out of the targeted search. The results will then come from all countries. If you select just 'Ethiopia' then the results will only contain resources linked with 'Ethiopia'

## Themes

Themes are handpicked groups of resources sharing similar topics. They highlight some of the best resources that HAL has to offer. They can be a good way to browse new resources, although they only represent a tiny percentage of the resources available.

## Working with search results

Search results are displayed as thumbnails or a list in the main work area sorted in order of relevance. Information about this search, sorting and resource browsing are shown across the top of the work area. They include:

- **You found** – how many resources have been found matching your request
- **Display** – click to change the way resources are displayed, either as large or small thumbnails or a list
- **Sort order** – click to change the order of resources, based on relevance, popularity, date or colour
  - **Relevance** – HAL ranks resources against keywords
  - **Popularity** – based on how many times the resource has been viewed
  - **Date** – date the resource was created
  - **Colour** – sorts the resources by hue.
- **Browse results** - navigate through the pages of results. This also shows which page you are currently viewing.
- **Archives** – if any of the archives match your search you can access them from a link under the results.
- **Save search query to collection** – if this is a search you may need again, you can save the criteria to your collection panel.

Each resource is shown in an individual resource box in the thumbnails display. The box shows a preview image, title, location, rating for the best resources, email resource icon and add to collection icon.

- **View resource details and download options** – click on the preview image or title
- **Email resource** – click on the envelope icon to bring up a form allowing you to email the resource link to another user. This is useful for quickly sharing resources with colleagues. If you email an external user, you must select 'Restricted' access and set the expiry date to a week ahead of the day you are sending it.
- **Add to current collection** – click on the add to current collection icon to add this resource to the collection shown in the *My Collections* panel. You can use this to bookmark particular resources for later use.



## Working with resources

The *Resource Details* page has everything you need to know about a particular resource such as title, date, caption, credits, copyright, recorded uses of the resource and all associated information. It also includes the *Resource Tools* panel with options on viewing previews, logs, streaming videos and downloading files in different sizes,

Access the *Resource Details* page by selecting a resource from a search, theme, collection or email sent from HAL. The workspace expands to fit the full width of your browser. If you have a smaller screen, the *Resource Tools* panel will appear under the preview image.

The screenshot shows a digital resource interface. At the top left, the title 'Solar oven in Sri Lanka' is displayed. Below it is a large preview image of a woman working on a solar oven. To the right of the image is the 'Resource Tools' panel, which contains a table of file options:

File Information	File Size	Options
<b>Original JPG File</b> 4256 x 2832 pixels (12.1 MP) 36 cm x 24 cm @ 300 PPI	4.9 MB	<b>Download</b>
<b>Low resolution print</b> 2000 x 1331 pixels (2.7 MP) 16.9 cm x 11.3 cm @ 300 PPI	502 KB	<b>Download</b>
<b>Screen</b> 850 x 566 pixels 7.2 cm x 4.8 cm @ 300 PPI	122 KB	<b>Download</b>
<b>Preview</b> Full screen preview	122 KB	<b>View</b>

Below the table are navigation links: '> Add to collection', '> E-mail', '> Link', '> Edit', '> Manage alternative files', and '> Log'. To the right of the main content is a 'Simple Search' sidebar with search filters for Photo, Document, Video, and Audio, and dropdown menus for Keywords, Country, and By Date. At the bottom of the page, there is a navigation bar with 'My Collections', 'Current Collection: Solar oven in Sri L', '15 items', and various utility links like 'Manage My Collections', 'Share', 'Print', 'View all', 'Download all', and 'Show thumbs'.

## Resource Details panel

For an image resource, the main panel shows a larger preview of the resource, its title and all the associated information, including country, date, caption and other information. For a video resource the preview shows a still representing the video while a document resource shows the content of the story.

## Resource tools panel

The *Resource tools* panel shows information regarding the different file versions of the resource. Depending on each resource there may be one or more options to select, along with exact technical details of the file, including pixel dimensions, image measurements, resolution and file size. Select the option most appropriate for your use:

- **Photo**
  - **Highest quality print / original file** – download the best resolution picture available, suitable for professional printing
  - **Low resolution print** - suitable for most everyday needs
  - **Screen** – download a low resolution file suitable for screen display such as web or PowerPoint
  - **Preview** – generates a full-screen preview without downloading the file.
- **Video**
  - **online preview** – streams a low resolution version of the video directly to your computer for viewing without downloading.
  - **download** – download the file
- **Document**
  - **Original file** – download the original file
  - **Screen** – download a low resolution file suitable for screen display such as web or PowerPoint
  - **Preview** – if the document is a PDF, read it online without downloading

Additionally this panel has 'add to collection' and 'email resource' options similar to those found on the main thumbnails screen:

- **Email resource** – click to bring up a form allowing you to email the resource to another user. If you email an external user (i.e. someone who doesn't work directly for HFHGB), you must select 'Restricted' access and set the expiry date to a week ahead of the day you are sending it.
- **Add to collection** – click to add this resource to the current collection shown in the *My Collections* panel
- **Log** – view the log of the resource to see when and where it was last used.

The screenshot shows the 'Resource Log' interface. At the top, there are navigation links: Home, Search Results, Themes, and Recent. Below this is a '< Back to resource view' link. The main content is a table with the following columns: Date, User, Action, Field, and Difference.

Date	User	Action	Field	Difference
29 March 11 @ 09:18	Eleanor Perkins	Created resource		
29 March 11 @ 09:18	Eleanor Perkins	Uploaded file		
29 March 11 @ 09:20	Eleanor Perkins	Edited resource field	Keywords	- construction + Finance + Happy + Home + Homepartner + Horizontal + Men + Smiling + Solution
29 March 11 @ 09:20	Eleanor Perkins	Edited resource field	Caption	- affiliates - or + for Humanity affiliates + for Humanity + our

On the right side, there is a sidebar with filters: 'Simple' search box, 'urban' filter, checkboxes for Photo, Document, Video, and Audio, 'Keyword' field, 'Country' field, 'By Date' dropdown (set to 'Any year'), and a 'Clear' button. At the bottom, there is a 'My Collections' panel showing the current collection 'Homepartner Scilathurai' and a row of thumbnails.

If you are a user with restricted permissions to accessing resources, you may need to select 'Request resource' instead of 'download'. When your request has been approved you will receive an email from HAL with a hyperlink to your resource.

## Related resources panel

The panel directly under the *Resource Details* panel shows thumbnails of all the resources related to the current one. These resources may be linked for a variety of reasons. Often there may be many resources linked to a particular story or project, including photos, videos and documents. An option allows all the related resources to be opened up in the thumbnail view as if they are the results of a search.

The screenshot shows the 'Related Resources' panel. At the top, there is a text block: 'Solar cookers manufactured at the Natural Resource Centre truly work - a meal of rice & curry can be cooked in three hours using the blazing sunlight. It is a product that will also save trees from being chopped down. With nearly 77% of Sri Lanka using firewood and 17% using costly LP Gas - the introduction of Solar Cookers is creating excitement and is an alternate energy product that does not induce global warming by emitting green house gases.'

Below this is a grid of thumbnails. Each thumbnail is labeled 'Solar oven ...'. There are two rows of thumbnails. At the bottom of the grid, there is a link: 'Click to view these resources as a result set'. Below the grid, there is a section for 'Related themes and public collections'.

## Search for similar resources panel

This panel shows keywords used by the current resource. By ticking the various words the search button dynamically changes to show you how many other resources also match. Click the button to show all those resources. This tool can allow you to refine your current search.

## Downloading resources

Download the most suitable file type using the *Resource Tools* panel as described above.

Copyright: If the copyright of a resource belongs to anyone other than HFHGB, a pop-up warning box will appear when you download the resource. You need to follow the instructions in the pop-up box in these cases.

When downloading the resource you should complete the **'intended use' form**. We need to keep a record in HAL of where and when each resource is used. Doing this when you download the resource will save a lot of time later.

Things to check when you're downloading:

- Has the subject given permission? If not, this resource may not be used. Consult admin for advice.
- Copyright – you will be warned if the copyright for the resource belongs to anyone other than Habitat for Humanity.
- Do you need to download? If you just want to save the resource for later reference, then add it to one of your *Collections*.

## Using resources

In general, all of the resources available to you on HAL should have been approved for use. However, you do need to be vigilant. In general you should not use for public distribution any images or videos that show:

- naked children or inappropriately dressed people
- unsafe construction practices and children on obviously active construction sites

**Remember that it's our duty to respect the dignity of our homepartners and volunteers, whatever the situation.**

## Working with collections

*Collections* are a way to manage the resources you find. By adding resources to a *collection* you can build up your own personal selection of images, stories, videos and saved searches. HAL manages and remembers your collections so they are available whenever you return and from any computer you access HAL from. *Collections* act in a similar way to the 'shopping basket' found on many e-commerce websites.

You are not restricted to a single collection. It is possible to create as many collections as you need. For example, you could set up a collection for each appeal or brochure you are working on, or make a collection of your favourite resources. Also, one resource can be in many different collections.

*Collections* also work as a tool for sharing resources and working collaboratively with others. You can make particular collections available to particular users or groups of users.

## The *My collections* panel

At the bottom of every screen is the *My Collections* panel. You can select 'show thumbs' or 'hide thumbs' to expand or hide the thumbnails in your active collection. By default, you will have a collection called *My Collection* to get you started. This cannot be deleted. You can add any resource to this by clicking the icon in the resource panels returned from a search or from within

the *Resource Details* screen. You can also save the search parameters to your collection by clicking the option at the bottom of the work area after a search.



The *Collections* panel consists of:

- **Current collection** – a dropdown menu allows you to switch between your collections if you have more than one.
- **Manage ‘My Collections’** – click to access the *Collection* management screen where you can create, edit and delete your *collections*.
- **Share** – click to bring up a form allowing you to email the whole *collection* to another user. This is useful for quickly sending resources to colleagues.
- **Edit** – edit the details of your collection.
- **View all** – Click to show all the resources in the main work area.
- **Hide thumbs** – click to hide the thumbnail previews and reduce the size of the collections panel. You will still have full access to all the functions of the collections panel.
- **Edit all** – Click to edit particular details of all the individual resources in your collection at once. Use with caution as this overwrites the existing details of the resources.
- **Download all** – downloads a zip file of the whole collection to your computer, together with a text file of the resource details.
- **Individual thumbnails and tiles** – Click to view the resource in detail.
- **x Remove** – Click to remove the resource from the collection. This does not delete the resource from the whole of HAL.

## Managing collections – ‘My Collections’ screen

Click on *My Collections* in the home page, or *Manage ‘My collections’* in the *Collections* panel to access the management screen. The screen shows a list of all your collections:

- **Collection name** – this is also shown in the *Collection* panel dropdown menu.
- **Owner** – the user who set up the *collection*.
- **ID** – unique number for the *collection*
- **Created** – the date the *collection* was initially created.
- **Items** – the number of resources in the *collection*.
- **Access** - whether it is a public or a private *collection*
- **Tools** - different options to manage your *collections*:
  - **View** – shows all the resources from the *collection* in the main work area
  - **Select** – changes the *collection* panel to show that particular *collection*
  - **Email** – click to bring up a form allowing you to email the whole *collection* to another user.
  - **Delete** – remove the *collection*
  - **Edit** – edit the main set-up parameters of the *collection*
  - **Log** - view list of activities
  - **Contact sheet** – produces a sheet of thumbnails of the items in the collection.

## Creating and editing a collection

You can create a new *collection* by typing a name under 'Create New Collection' and filling out the subsequent form. It is possible to edit these fields at any time so you can manage the *collection* to suit your need.

- **Name** – a name for the *collection*
- **ID** – a unique number generated by HAL
- **Access** – choose from *Private* or *Public* to control access to your *collection*. *Private* stops others seeing your collection without your approval, while *Public* opens up the collection to everyone.
- **Theme Category** – [admin only] link the collection with one of the theme categories to showcase some of the best available resources to other users.
- **Allow other users to add/remove resources** – by default only you can add and remove resources from your *collection* even if you have shared it with other users. Tick this option to allow those users to add and remove resources. You can block access at any time by deselecting this option.
- **Attached users** – add other users to your *collection* and it will appear in their own *collection* panel when they access HAL.
- **Relate all resources in collection** - click on this to indicate that all resources in the collection are related. This is useful if the collection includes resources about a specific homepartner story or project. If someone looks at one of these resources, then all of the other related resources will be listed below it.

## Shared and collaborative working using collections

You can quickly share your *collection* by selecting 'Share' in the 'Manage my collections' page. This is a way for teams to work together on a project using the same *collection* of resources. HAL brings all the resources into a single shared collection that the attached users can access. You may choose to restrict collections so the users can only view and download the resources, or you may choose full access for the team so they can add and remove them. You should restrict access if you are sharing the collection with an external agency (i.e. someone who does not work directly for HFHGB).

By making a *collection* public, you share your *collection* with anyone who has access to HAL. This is useful if you have a *collection* you feel other users may benefit from. It is possible to search all of the public *collections* from the 'Manage my collections' page.

## Recent

Clicking on the heading *Recent* in the main menu will bring up all of the recently added resources. You can browse these like you would browse the results of a search.

## Uploading resources

Uploading quality resources with good quality information attached is the key to the success of a system like HAL. The more information that is stored with each resource, the easier it is to find resources that fit your needs. If you save no information other than the title of the photo, the resource will be of little use and no user will be able to find it. For example, this picture is of widow Ineli Banda and her son Gift. They are homepartners in a programme in Zambia, and the photo was taken in 2009. If a user uploads this photo and then does not include this information, it will not appear in any searches. If the user enters saves the country name, but no other information, it will only appear in a search on 'Zambia', but not in searches for 'family', 'homepartner', 'widow' or any other words.

Access the 'Upload' page from the *Main Menu*.

From this page you can upload just one or multiple resources of the



same type (photos, documents, video or audio). For example, when you have many photos of the same subject in the same situation you can upload them in a batch. For uploading a batch of resources you only need to fill in the 'Upload' page once.

The 'Upload' page displays the fields available to complete. Many of these fields are required (indicated with an asterisk) and you will not be able to proceed until they have been completed. Once you have entered as much data as you can, click 'Next'.

- **Clear Form** – clears any data from the fields
- **Do not import embedded metadata for this upload** – many resources will already have electronic data attached to them, such as technical data and even captions and credits. Click this box if you do not wish to use this data. If you do not tick this box, HAL will transfer any data already attached to the resource and place it in the relevant fields. Sometimes this means it will overwrite data you have already put in that field in the form or clear other fields, so please check after upload. If you don't think that what you're uploading has any data attached to it, then it's best to click this box.
- **Resource type** - choose from Photo, Document, Video or Audio. Make sure you pick the correct type of resource, otherwise what you upload will be hard to find. This also will give you different fields to fill in.
- **Add to collection** – you can choose to add the resource to an existing collection, create a new collection to put the resource in, or add it to no collection. If you don't give the new collection a name, HAL will automatically generate a random number.
- **Title (required)** – give the resource a title which will appear on the *Resource Details* page.
- **Keywords (required)** – select as many keywords as are relevant to the resource.
- **Caption** – enter a short description of who/what is in the photograph, what is in the video, what the document is about or what the audio file is. Also include any background information such as the project or GV objectives. See the guidelines to caption writing below.
- **Area (required)** – select the correct HFH area for the country from the list

<b>AME</b> (Africa and Middle East)	Countries include: Angola, Botswana, Burundi, Cameroon, Central African Republic, Cote d'Ivoire Democratic, Republic of Congo, Egypt, Ethiopia, Ghana, Jordan, Kenya, Lebanon, Lesotho, Liberia, Madagascar, Malawi, Mozambique, Nigeria, Rwanda, Senegal, Sierra Leone, South Africa, Tanzania, Uganda, Zambia, Zimbabwe
<b>AP</b> (Asia Pacific)	Countries include: Afghanistan, Australia, Bangladesh, Cambodia, China, East Timor, Fiji Islands, Guam, India, Indonesia, Japan, Laos, Malaysia, Mongolia, Myanmar, Nepal, New Zealand, Papua New Guinea, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Thailand, Vietnam
<b>ECA</b> (Europe and Central Asia)	Countries include: Armenia, Bulgaria, France, Germany, Great Britain, Hungary, Kyrgyzstan, Macedonia, Netherlands, Northern Ireland, Poland, Portugal, Republic of Ireland, Romania, Russia, Slovakia, Switzerland, Tajikistan, Turkey, Ukraine
<b>LAC</b> (Latin America and Caribbean)	Countries include: Argentina, Bermuda, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Mexico, Nicaragua, Paraguay, Trinidad & Tobago
<b>USA &amp; Canada</b>	

- **Country (required)** – use the dropdown menu to select the country which is featured in the resource (i.e. you may have received a photo of a family in Russia but via the office in Slovakia. The country would be 'Russia').
- **Location** – enter the name of the village, district or province if you know it
- **Named persons** – list the names of any recognisable people in the resource and give their job title, e.g. 'Andrew Mace, British Ambassador to Cambodia'.
- **Project code** – if the resource is related to a PBF project or GV trip select the relevant code. If the code you need isn't there, contact admin.

- **Story code** – if the resource is related to one of the focus project homepartner stories, select the relevant story code from the dropdown list. If the code you need isn't there, contact admin.
- **Theme** – select the HFHGB theme(s) which best describes the resource. For GV or events, choose 'Community leadership and public mobilisation (developing active citizens for the cause)'. Try to avoid using 'other'. A resource can fit into more than one theme. For example a GV trip (Community leadership and public mobilisation (developing active citizens for the cause)) could also be serving OVC families (**Subsidised shelter programmes for targeted marginalised and vulnerable groups**)

<b>Accessible and affordable housing finance</b>	Includes microfinance, save and build
<b>Advocating sustainable secured housing tenure - property rights and improved affordable housing supply systems</b>	Advocacy projects, community training
<b>Disaster Risk Reduction - Shelter reconstruction and reducing the impact of climate change</b>	Includes disaster response projects and disaster mitigation.
<b>Innovative local shelter construction technology and sustainable development</b>	Includes projects using local building techniques (like chika, bamboo or mulberry twigs) or energy-efficient technology (e.g. solar ovens)
<b>Community leadership and public mobilisation (developing active citizens for the cause)</b>	Includes GV trips and GB fundraising events
<b>Liveable cities and urbanisation</b>	Includes urban regeneration and renovation projects
<b>Driving the house construction economy - construction enterprise and construction education</b>	Includes construction training courses
<b>Subsidised shelter programmes for targeted marginalised and vulnerable groups</b>	Most of the photos fit into this category.
<b>Other</b>	

- **Includes homepartner** – tick yes if the resource includes a homepartner
- **Includes volunteer** – tick yes if the resource includes a homepartner
- **H&S approved** – check that the practices displayed in the resource are in accordance with HFHGB's health and safety guidelines, particularly with regard to volunteers.
- **Permission to use** – tick no if the subject of the resource has removed their permission for us to use photos/videos/quotes of them. Generally if we have a photo, story or video of someone then we will already have gained permission.<sup>1</sup>
- **Copyright** – if the resource has been taken from an external source e.g. AlertNet, select the relevant copyright. Otherwise the default copyright is HFHGB.
- **Date** – the date the photo/video/document/audio file was created
- **Credit** – name the photographer/videographer/composer/author of the resource

Once you have entered all the data you have, click 'next'. You will be redirected to a page where you can browse for the files to upload.

When each file has been uploaded a new resource will have been created. By clicking on 'recent' in the main menu you can see the resources you have most recently uploaded.

## Writing a caption

Captions should read clearly and be laden with information about the asset. The following approach, by M. Wells, gives a sensible framework:

<sup>1</sup> GV volunteers and GB Hope Challenge participants give their permission through agreeing to the terms and conditions of the trip/event.

1. Name any people in the asset and state their roles
2. include the age group and gender of the subjects, but don't guess sensitive information about ethnicity or age.
3. Describe the subject and its attributes or layout, e.g. "Large oak tree against a sunny sky".
4. Location context "Team from NHBC laying foundations in Malawi"
5. Colours and visual attributes "Jenny's new latrine painted yellow"
6. Timing information, e.g. " Jones family at home in winter"
7. The meaning or purpose of the image, indicating its significance, e.g. "The first time Fred works from home".

## **System Admin**

There is more information on the *ResourceSpace* Wiki: <http://wiki.resourcespace.org>

### **Add more options to fixed lists**

Go to Team Centre > Manage Resources > Manage field options, and you can edit or add options to the fixed lists, including project codes, keywords, copyright options and story codes.

### **Approve pending resources** (weekly task)

Go to Team Centre > Manage Resources > View User Contributed Resources Pending Submission OR View User Contributed Resources Pending Review. This gives you a list of all the pending resources.

To approve these one by one, click on the resource to bring up the Resource View, click 'edit' and then change the status to 'Active'.

Alternatively, to change the status of more than one resource at the same time, create a new collection, add the resources pending to this new collection and then use 'edit all' to change the status to 'Active'.

### **Archive resources**

Go to Resource View > Edit > Change status to 'Archived'. Whole collections can be archived by going to 'edit all' and changing the status to 'Archived'.

### **Backup**

Every evening the contents of HAL will be backed up onto the 1&1 server space provided. In the event of a system failure HAL can be restored from this backup.

### **Check amount of space available**

Go to Team Centre > Disk Usage to view the amount of space currently being used and space available.

### **Edit wording**

Go to Team Centre > Manage Content to edit text fields such as the welcome message, the content of automatically generated emails, contact details or the Help and Advice page.

### **Export data**

This feature in Team Centre gives you the option to perform a mysqldump in either SQL or XMP. This is an optional backup programme, in addition to the regular automatic backups.

### **Installation check**

Go to Team Centre > Installation Check, to view the version details and statuses of the various components of HAL/ResourceSpace.

### **Manage plugins**

There are a number of plugins available which can extend the functionality of HAL/ResourceSpace. These are listed under Team Centre > Manage plugins.

## Reports

There are reports available under Team Centre > View Reports. You can then choose to view a variety of different reports showing how people are using the resources in HAL.

## Send bulk email

Use this option in Team Centre to send emails to one or more HAL users, or to particular user groups.

## System set-up (super-admin only)

This option in Team Centre allows you to:

- manage user groups and permissions
- manage resource types and fields
- create and edit reports using SQL
- set sizes for download and preview

## View statistics

Use this option in Team Centre to view numerical data on how HAL is being used. There is also an option to print the statistics.

## Appendix 1

HAL is powered by *ResourceSpace*: Open source digital asset management. *ResourceSpace* was developed for Oxfam GB by Neale Hall and Dan Huby. This guide is based on the *ResourceSpace* User Guide written by Neale Hall (2007).

## Appendix 2 – HAL in action

### 1. Preparing an appeal & working together with an agency

The DM manager is working together with an external agency to produce the next appeal. The DM manager needs to share a selection of images for the agency to use in the appeal without having to spend a lot of time uploading files to FTP or emailing large files. He/she can create a new Collection of suggested photos for the appeal and share this with the agency. The agency can then search through the suggestions and download any that are suitable.

### 2. Supporter request with minutes to go!

A supporter telephones on Friday late afternoon asking for photos to accompany a presentation they're doing on Sunday morning. They need images of a particular project, taken last year which include the homepartner. A member of staff can go straight to the *Search Panel* and enter the details they need. From the *Resources Details* page the staff member can choose a selection of images, create a collection and share this with the supporter without needing to email large files.