

# **NCompas Media User Manual**

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# 1 INTRODUCTION

## 1.1 About NCompas Media

NCompas Media makes it easy to take photos and collect data in the field and sync it to your computer. NCompas Media works in combination with the NCompas Photo Station Monitoring App, which installs on Android and iOS mobile devices and syncs with NCompas Media to allow photo uploads and downloads. In the field, you can add comments to describe your photos as well as record other types of data. NCompas Media and the NCompas Photo Station Monitoring App also makes it easy to take repeated photos in the field from the exact same location (also called photo stations) so you can compare changes in what you are photographing from season to season or year to year. In the office, you can edit photo comments, organize the photos, and create PDF photo reports. From the office, you can also export data that you collected using NCompas Media so that it can be opened easily in Excel or other types of statistical software for the purpose of data analysis. Since everything is stored on one server, changes to photos or data made by one user are available to all other users in real-time.

## 1.2 What you will learn here

The purpose of this manual is to walk you through the steps required to use the NCompas Media web interface effectively:

1. How to log into NCompas Media and create new user accounts
2. How to set up your NCompas Media project files before heading into the field to take photos and collect data
3. How to sync the photos and data you have collected to the server
4. How to edit and manage your photos and data using the NCompas Media web app
5. How to create photo reports and export data

# 2 LOGGING IN TO NCOMPAS MEDIA

## 2.1 Login

The first time you login, you will be asked to enter your username and password. When you first install the program, the username and password will be the same: **admin**

## 2.2 Create a new user account

Now that media has been configured to the correct IP address you can create individual user accounts. This can only be done by an NCompas Media Administrator.

There are three different types of user accounts within NCompas Media that provide different levels of access to the individual users. An “Administrator” has full access to all NCompas Media functions. Administrators are the only users that can create new user accounts. ‘Manager’ accounts are unable to access administrator tools such as media paths or create user accounts, but can import, sort, and retrieve photos. The ‘End User’ account is the most restricted account. “End User” accounts can access photos and data in the software database and generate photo reports.

The three different users and their associated permissions:

Task	Administrator	Manager	End User
Set up customized file structure level names	✓	X	X
Manage photo data options	✓	✓	X
Manage media paths	✓	X	X
Manage email settings	✓	✓	✓
Manage database server settings	✓	✓	✓

Manage sync settings	✓	✓	X
Set up accounts	✓	X	X
Add projects/site/phases	✓	X	X
Manage photos	✓	✓	X
Manage documents	✓	✓	X
Generate slide show	✓	✓	✓
Generate reports	✓	✓	✓

To create a new user account, select the **Administration** icon in the top NCompas Media toolbar, click **New User** and then fill in the requested information. Make sure to select the desired **User Type** and click **Save**.

[1-manage\_users.png]

## 2.3 Changing passwords

After logging in to NCompas Media for the first time, the **Username** and **Password** of the admin account should be changed. To change a username and password select **Administration** from the main NCompas Media toolbar. Select **Open User**. Double click on the username you want to open. Replace the **Username** and **Password** and click **Save**.

## 3 PRE-FIELD SET-UP

Before heading out into the field to take photos with NCompas Media, you will need to complete a series of setup steps.

### 3.1 Adding project information

Before collecting photos and data, you will want to add the necessary contact, client, location, and project information associated with your projects. To begin making these changes to the database, click on **Projects** in the top NCompas Media toolbar. From there, the side menu gives you the option to manage contacts, clients, locations, class names, and projects. The following sections walk you through these options.

#### 3.1.1 Manage Contacts

To add a new project client contact person:

- Select **Manage Contacts** from the side menu.
- Enter the contact information in the fields provided.
- Click **Save Contact**.

To view the list of existing contacts and edit or delete existing contacts:

- Select **Manage Contacts** from the side menu.
- Select **Open Contact** at the top of the **Manage Contacts** Screen.
- Scroll through the list for the name of your project contact. Click on the name and select **Open Contact**.
- You can edit the contact information in the fields and then click **Save Contact**. Or, you can click **Delete Contact** to delete the contact.

[2-manage\_contacts.png]

### 3.1.2 Manage Clients

After entering the client contact person, you will need to enter the client company. To associate a contact with a client company:

- Select **Manage Clients** from the side menu.
- Enter the client information in the fields provided and click on **General Contact** to select the client contact person from the pre-populated drop-down menu.
- Click **Save Client**.

To view the list of existing clients and edit or delete existing clients:

- Select **Manage Clients** from the side menu.
- Select the **Open Client** icon at the top of the **Manage Clients** screen.
- Scroll through the list for the name of your project client. Click on the name and select **Open Client**.
- You can edit the information in the fields and then click **Save Client**. Or, you can click **Delete Client** to delete the client.

[3-manage\_clients.png]

### 3.1.3 Manage Locations

Each project is associated with a location. Before a project can be created you must enter the location in NCompas Media.

To create a new location:

- Select **Manage Locations** from the side menu.
- Enter the general location of the project in the **Location Name** field.
- In the **Comments** field you have the option of writing a brief description of the location.
- Click **Save Location**.

To view the list of existing locations and edit or delete existing locations:

- Select **Manage Locations** from the side menu.
- Select **Open Location** icon at the top of the **Manage Locations** screen.
- Scroll through the list for the name of your location. Click on the name and select **Open Location**.
- You can edit the information in the fields and then click **Save Location**. Or, you can click **Delete Location** to delete it.

[4-manage\_locations.png]

### 3.1.4 Manage Class Name

To create a new project class name:

- Select **Manage Class Name** from the side menu.
- Enter a project class name in the Class Name field.
- In the Description box you have the option of providing more details about the project class.
- Click **Save Class Name**.

To view the list of existing class names and edit or delete existing class names:

- Select **Manage Class Names** from the side menu.
- Select the **Open Class Name** icon at the top of the **Manage Class Name** Screen.
- Select one class name and click **Open Class Name**.
- You can edit the information in the fields and then click **Save Class Name**. Or, you can click **Delete Class Name** to delete the class name.

[5-manage\_class\_name.png]

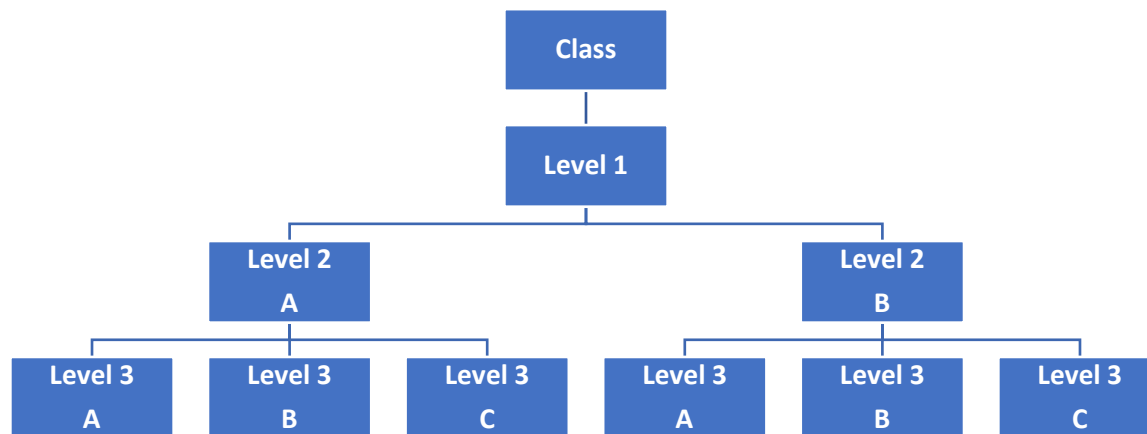
### 3.1.5 Manage Projects

An NCompas Media project file structure can be configured with up to three levels of information into which photos and data are stored: Level 1, Level 2, and Level 3. For field biologists, Level 1 is usually your project name. It is the coarsest filter by which you will be able to sort your photos later. Level 2 is typically your site name, and Level 3 is a project phase or date. See the example below:

You begin a rehabilitation project in the Alda Estuary that involves work at multiple sites within the estuary and that has multiple work phases at each site. You would specify in NCompas that the project name is “Alda Estuary Rehabilitation” (Level 1). Within this project there is a work site (Level 2) called “Intertidal Salt Marsh”. The three work phases (Level 3) at this site are “As-built (2000)”, “Bench Planting (2000)”, “Construction (2000)”, and “Monitoring (2003)”.

[6-levels.png]

A flow chart like the one below provides to see how the file structure for your photos and data should look.



To create a new project, follow the steps below (make sure that you have created a **class**, **location**, and **client** before you create a new project):

- Select **Manage Projects** from the side menu.
- Select the correct project **Class Name**, create a **Project** name, and enter the **Project Number**, **Project Manager**, **Location Name** and **Client Name** in the appropriate fields and drop-down menus.
- There is only one option for the **Path**, identifying the database location as specified during the database configuration.

- Select the correct **Start Date** for the project. If all phases of the project have been completed, enter the **End Date** as well. If the project is still active leave **End Date** blank.
- In the **Description** box, provide a summary of the project.
- Click **Save Project**.

To view the list of existing projects and edit or delete existing projects:

- Select **Manage Projects** from the side menu.
- Select the **Open Project** icon at the top of the **Manage Projects** screen.
- Scroll through the list for the name of your project.
- You can edit the information in the fields and then click **Save Project**. Or you can click **Delete Project** to delete the project.

[7-manage\_projects.png]

### 3.1.6 Manage Sites

Once a new project has been created in NCompas Media, new Site and Phase Types can be created under **Projects** in the top NCompas Media toolbar.

To create a new site:

- Select **Manage Sites** from the side menu.
- Select the **Project Name** from the drop-down menu and type the name of the site in the **Site Name** field.
- Select the appropriate location.
- In the **Comments** field you can add an additional description about the site.
- Click **Save Site**.

To view the list of existing sites and edit or delete existing sites:

- Select **Manage Sites** from the side menu.
- Select the **Open Site** icon at the top of the **Manage Sites** Screen.
- Select a site and click **Open Site** to open the existing profile.
- You can edit the information in the fields and then click **Save Site**. Or, you can click **Delete Site** to delete this contact.

[8-manage\_sites.png]

### 3.1.7 Manage Phase Types

After creating projects and sites, you can add project phases at each site. Before a phase can be applied, it must be created as a phase type and then assigned to a site. This 2-step process uses the **Manage Phase Types** and **Manage Phases** tools.

To create a new phase type:

- Select **Manage Phase Types** from the side menu.
- Enter the **Phase Type** in the field provided along with a description.
- Click **Save Phase Type**.

To view the list of existing phase types and edit or delete existing phase types:

- Select **Manage Phase Types** from the side menu.



- Select the **Open Phase Type** icon at the top of the **Manage Phase Types** Screen.
- Select a phase type and click **Open Phase Type** to open the existing profile.
- You can edit the information in the fields and then click **Save Phase Type**. Or, you can click **Delete Phase Type** to delete it.

[9-manage\_phase\_types.png]

### 3.1.8 Manage Phases

Once all the necessary information (project name, site name, and phase type) has been entered in the previous steps, the **Site** and **Phase Type** can be assigned to a project as a phase.

To create a new phase type:

- Select **Manage Phases** from the side menu.
- From the drop-down choose the correct **Project Name**, **Site Name** and **Phase Type** in the appropriate drop-down menus.
- Click **Save Phase**.
- Choose the correct **Start Date** for the phase. If the phase has been completed, enter an **End Date**. If the phase is still active, leave **End Date** empty.
- Enter a short description for the current phase **Status**: e.g. (Active, Pending, or Complete)
- Additional **Comments** about the phase may be added.

To view the list of existing phases and edit or delete existing phases:

- Select **Manage Phases** from the side menu.
- Select the **Open Phase** icon at the top of the **Manage Phases** Screen.
- Select a phase type and click **Open Phase** to open the existing profile.
- You can edit the information in the fields and then click **Save Phase**. Or, you can click **Delete Phase** to delete it.

## 3.2 Adding personnel information

You will want to add the names and contact information for the employees, subcontractors, and volunteers associated with your projects so you can keep track of who took photos or entered data. You can use this information later to filter and sort photos. To do this, click on **Photos** in the top NCompas Media toolbar. From there, follow the instructions below for each of the side menu options.

### 3.2.1 Manage Employees

To enter a new employee:

- Select **Manage Employees** from the side menu.
- Enter the employee information in the fields.
- Click **Save Employee**.

To view the list of existing employees and edit or delete existing employees:

- Select **Manage Employees** from the side menu.
- Select the **Open Employee** icon at the top of the **Manage Employee** screen.
- Select one employee and click **Open** button to open the existing employee profile.
- You can edit the information in the fields and then click **Save Class Name**. Or, you can click **Delete Class Name** to delete the class name.

[10-manage\_employees.png]

### 3.2.2 Manage Subcontractors

You may have subcontractors hired by the prime contractor working on your project. To add a new subcontractor:

- Select **Manage Subcontractors** from the side menu.
- Enter the subcontractor information in the fields – Selecting the Country and Province/State from the pre-populated drop-down menu if applicable.
- Click **Save Subcontractor**.

To view the list of existing employees and edit or delete existing employees:

- Select **Manage Subcontractors** from the side menu.
- Select the **Open Subcontractor** icon at the top of the **Manage Subcontractor** Screen.
- Select one subcontractor and click **Open Subcontractor** to open the existing profile.
- You can edit the information in the fields and then click **Save Subcontractor**. Or, you can click **Delete subcontractor** to delete it.

[11-manage\_subs.png]

### 3.2.3 Manage Volunteers

If you have volunteers performing voluntary work on your project, you can add their information to NCompas Media.

To add a new volunteer:

- Select **Manage Volunteers** from the side menu.
- Enter the volunteer information in the fields, selecting the **Country** and **Province/State** from the pre-populated drop-down menu if applicable.
- Click **Save Volunteer**.

To view the list of existing volunteers and edit or delete existing volunteers:

- Select **Manage Volunteers** from the side menu.
- Select the **Open Volunteer** icon at the top of the **Manage Volunteers** Screen.
- Select a volunteer and click **Open Volunteer** to open the existing profile.
- You can edit the information in the fields and then click **Save Volunteer**. Or, you can click **Delete Volunteer** to delete this contact.

[12-manage\_volunteers.png]

## 3.3 Setting camera and GPS settings

You will want to tag photos with the name of the specific device and GPS system used to take the photo. GPS and Camera types must be pre-populated before they can be assigned to a photo.

To add a new camera or GPS system:

- Select the **Photos** icon from the top NCompas Media toolbar.
- Select **Manage Cameras** or **Manage GPS Systems** from the side menu.
- Fill in the camera/GPS make and model in the field provided as well as a description of the equipment for easy identification (color, age, ownership, rental etc).

- Click **Save Camera/Save GPS System**. The devices will now be shown in the drop-down lists of **Camera** or **GPS System**.

To view the list of existing GPS systems or cameras and edit or delete them:

- Select the **Photos** icon from the top NCompas Media toolbar.
- Select **Manage Cameras** or **Manage GPS Systems** from the side menu.
- Select the **Open Camera** or **Open GPS System** icon at the top of the **Manage Cameras** or **Manage GPS Systems** window.
- Click **View Archived** to view all cameras or GPS systems including archived ones. Click **Hide Archived** to view unarchived cameras or GPS systems only. Note that unarchived cameras or GPS systems are displayed only by default.
- Scroll through the list for the name of cameras or GPS systems. Select the **Open Camera** or **Open GPS System** icon at the top of the **Manage Cameras** or **Manage GPS Systems** Station window.
- Edit the camera or GPS system information in the fields provided and click **Save Camera** or **Save GPS System**. Or, to delete information click **Delete Camera** or **Delete GPS System**.

[13-manage\_cams.png]

### 3.4 Customize fields

This option allows you to customize your new data information fields for specific projects. To customize fields, select **Customize Fields** under **Setup** from the top menu. Field options include checkboxes, date, dropdowns, or textboxes. Options such as Fish Species, Discharge, or Percent MAD are examples of additionally added fields. The added customized data fields are visible in the Additional Photo Information tab on Manage Photo Screen.

[14-customize\_fields.png]

### 3.5 Setting photo data options

NCompas Media allows you to select the data fields that will be associated with your photos when they are imported into NCompas Media.

Data field selection is done in the **Photo Data Options** menu:

- Select **Setup** from the top menu and then click **Photo Data Options**.
- A new **Photo Data Options** window will appear where you are able to select or deselect any **Standard** or **Tracking Options** data fields to display on the photo entry screen.
- Once you have made your selections, click **Save** and the data fields visible in the Manage Photo Screen will reflect your selection.

[15-photo\_options.png]

### 3.6 Creating permanent monitoring stations

Field biologists often need to take photos from the exact same location and same angle season after season or year after year to look at changes in environmental features over time. NCompas Media makes this simple by allowing you to set up Photo Stations—locations where a photo must be taken at a specified compass bearing (or series of bearings). In addition to Photo Stations, NCompas Media also allows you to create other types of permanent monitoring stations, depending on what you are trying to monitor: Flow Monitoring Station, Game Cams, hydrological severity Index (HSI), and Permanent Cams.

Below, we show you how to create a new Photo Station as an example. The process to create, edit, and delete the other types of permanent monitoring station is identical. There is only one difference between the steps to create a Photo Station vs other permanent monitoring stations: Azimuth is required for a photo station, but not for the other permanent monitoring stations.

### 3.6.1 Create a new Photo Station

- Select **Photos** in the top NCompas Media toolbar.
- Select **Manage Permanent Monitoring Stations** from the side menu.
- Select **Manage Photo Station** from the list.

[16-photo\_station.png]

- Select the appropriate **Project Name**, **Site Name** and **Phase Type** from the dropdown menus.
- Type the **Photo Station Name** in the field provided.
- Fill in all additional fields including **Date Established** and **GPS System** if applicable. These describe the date that the photo station was established and how the GPS coordinates were determined.
- The **Marker Number** is the number on the photo station tag which marks the physical location in the field or leave blank if not applicable.
- Fill in the appropriate **Latitude and Longitude** for the GPS coordinates of the physical photo station marker and the **Compass Declination** for the photo azimuths.
- Azimuths are the compass bearing(s) at which repeat photos are to be taken. A single photo station can have multiple photo azimuths. Fill in the appropriate **Azimuth** for the Photo Station. Click the “+” sign to add an azimuth and click **Save Photo Station**. To add multiple azimuths for a single photo station, enter the second azimuth and click the “+” sign, and enter the third and then click the “+” sign. If you need to delete an azimuth that has already been entered, select the azimuth from the azimuth box listing, click the “-” sign and then **Save Photo Station** and the azimuth will be deleted.
- The ☒ **Active** box is checked if a Photo Station is currently in use. The box is unchecked if the Photo Station has been removed or replaced. This enables you to filter photo stations by active or inactive status.
- You have the option of specifying the name of the crew member(s) who created the photo station. Pick the names from the **Crew** field list, which lets you pick from people who are already included on the **Employee**, **Volunteer**, and **Subcontractor** lists. The selected crew members will appear in the **Established By** field. To add multiple crew members, select the second crew member, and then select the third crew member. If the user needs to remove a crew member that has already been added to the **Established By** field, select the crew member’s name again from the drop-down list field and then **Save Photo Station** and the crew member will be deleted from the **Established By** field.
- In the **Comments** field you can fill in any additional information about the photo station.
- Once all information has been entered, click **Save Photo Station**.

### 3.6.2 View, edit, or delete existing photo stations

To see if a **Photo Station** has already been entered into NCompas or to update information about an existing **Photo Station**:

- Select **Photos** in the top NCompas Media toolbar.
- Select **Manage Permanent Monitoring Stations** from the side menu.
- Select **Manage Photo Station** from the list in the pane along the left side

- Select **Open Photo Station** at the top of the Manage Photo Station window.
- Select one photo station, click **Open** to open the existing photo station.
- Edit the photo station information in the fields provided and click **Save Photo Station**.
- To delete a photo station, click **Delete Photo Station**.

[17-edit\_photo\_station.png]

## 4 TRANSFERRING PHOTOS AND DATA BETWEEN DEVICE AND NCOMPAS MEDIA

Now that NCompas Media has been fully configured, you are ready to begin importing photos. Before importing photos, ensure the complete set up of all pre-populated data fields: Project, Site, Phase, Photo Station and so on. There are three different ways of importing photos into NCompas Media: direct transfer, dropbox transfer, and manual import.

### 4.1 Direct transfer

### 4.2 Dropbox transfer

#### 4.2.1 Downloading photos

To import photos from a Dropbox folder (sent by the NCompas Photo Station Monitoring app) into NCompas Media:

- Open NCompas Media.
- Select **Setup** from the top NCompas Media toolbar.
- Select **Sync with Device** button.
- Select **Download Photos/Information** to start downloading photos from the Dropbox.

#### 4.2.2 Uploading media onto your device Photo Station Monitoring app

To upload photos and data from NCompas Media to the Photo Station Monitoring app on your device, the next steps must be performed in the Photo Station Monitoring app on your device:

- In your device **Settings**, scroll to find the Photo Station Monitoring app and click to select.

[18-ipad\_sync\_setting.png]

- In the **Upload Settings** section, click on **File Transfer Method** to choose the **Dropbox** upload method.
- Open the Photo Station Monitoring app. Click **Sync Photo Info** button to start syncing the selected photos and data to the app.
- You must enter your Dropbox username and password the first time you upload. The Photo Station Monitoring folder must be allowed to be accessed by NCompas Photo Station Monitoring App.

#### 4.2.3 Manual import

Sometimes you may want to add photos to NCompas Media that were not taken using the mobile device Photo Station Monitoring app (e.g., the photos were taken on a different camera or they were emailed to you from someone else). You can add photos individually or batch import multiple photos at a time:

- Select **Photos** in the top NCompas Media toolbar.
- Select **Manage Photos** from the side menu.

- Select the appropriate **Project Name** for the photo you want to import from the drop-down menu.
- Click on the box to the right with the large arrow and browse for the location of the photo you wish to import and click **Open**. Or, drag and drop the photo onto this icon.
- In the bottom **Tracking Options** window select the **Site** that is associated with the project as well as the appropriate **Phase Type** if applicable. Both fields are optional.
- If the date was not auto-filled, in the **Date Taken** box click the drop-down arrow and select the date the photo was taken.
- Fill in remaining applicable data fields as required. (Please see Appendix I for detailed information about photo data options).
- If you are batch importing photos, fill in any data fields that are common to the selected photos. Any fields selected or filled in on the **Manage Photo** screen will apply to all batch imported photos. Photo-specific information must be entered into each photo individually after import.
- Click **Save Photo** button. There is a window pop up saying “Do you want to remove the original photo after it is saved?” If you want to delete the photo from its original place on the local drive, select **Yes**. Otherwise, select **No**. Check the box next to “Always perform this action” to do the same thing every time.

In the example screenshot below, all batch imported photos have the same information in the **Project Name**, **Site**, **Phase Type**, **Date Taken**, and **Comments** fields.

## 5 EDITING AND ORGANIZING YOUR PHOTOS

### 5.1.1 View and edit photos

To view a photo that has been imported into NCompas Media:

- Select **Photos** from the top NCompas Media toolbar.
- Select **Manage Photos** from the list in the pane along the left side of the screen.
- Select **Open Photo** to look through projects to locate photos.
- Click on the ➤ signs to see the next levels. Click once on the photo image number to bring up a preview in the window. To view the photo at a larger size, double click the photo in the photo box. You can edit the photo’s caption by clicking in the white text box under the photo. To keep your changes, click **Save**.
- Double click the photo to open it and edit the other data fields.
- You can scroll left and right to view different photos under the same Project/Site/Phase by clicking **Previous Photo** or **Next Photo** at the top of the Manage Photo Station window.

[19-view\_edit\_photos.png]

### 5.1.2 Drag-and-drop photos

You may need to move photos from one project or site or phase to another, for example, if photos were imported to the wrong place. You can do this by dragging and dropping photos to a new location:

- Click **Photos** on the top NCompas Media toolbar.
- Go to the **Manage Photos** screen.
- Select **Move Photos**.
- Select the photos that you would like to move under the **Source** column and drag and drop to the **Destination** column.
- The new location can be a project, a site, or a phase.

[20-drag\_drop\_photos.png]

## 6 EXPORTING PHOTOS AND DATA

### 6.1.1 Export tool

You can easily export photos and comments out of NCompas Media and into a folder that is easy to send or share. Photos are exported as individual .jpeg files and comments as .csv text files.

To export photos and/or data:

- Click **Photos** on the top NCompas Media toolbar.
- Select **Manage Photos** from the list in the pane along the left side of the screen.
- Select **Open Photo** to look through projects to locate photos. Select the photos or the photos whose data you want to export then click **Export**.
- Select whether to export just the data, just the photo (different sizes are available), or both photo and data.
- Browse to the location where you want the exported photos stored on your computer and click **Save**. A new folder will be created called **NCompas Media Export** containing the exported files.

## 7 CREATING REPORTS

After organizing your photos, a useful way to share a collection of photos, photo comments, and metadata is to create a PDF report. You can create Photo Reports to show photos collected for a given project or Monitoring Reports to show photos collected at permanent monitoring stations, such as Photo Stations. This section will show you how to create, edit, and export Photo Reports. Monitoring Reports can be created and edited in the same way.

Follow the steps below to create a new photo report:

- Click **Reports** on the top NCompas Media toolbar.
- Select **Photo Reports** from the list in the pane along the left side of the screen (if creating a Monitoring Report, select **Monitoring Reports** instead).
- Select **Photos by Project Media** from the displayed options (if making a Monitoring Report, select any report type that ends in “**By Project Media**”).
- Select **Report** from the screen toolbar and then click **New**.
- Select the Project Name from the list. A new report will appear that contains the photos that have been entered under that Project Name (all sites, all phases). By default, photos will be displayed by Site and Phase (alphabetically) and then by display order (the order in which the photos were entered unless otherwise specified at the time of photo entry).
- Organize and configure your report as detailed in the following sections.

[21-creating\_reports.png]

### 7.1 Organizing report layout

There are multiple ways to manage the ordering of photos in reports, using the functions along the top of the report toolbar: **Filter By**, **Order By**, **Photo Picker**, and **Reorder Photo Numbers**. You can also drag and drop photos into the order you want them. Below is a quick summary of their features and appropriate uses. Detailed step-by-step instructions for use follow this section.

**Filter By** — select only those photos with specific criteria, or filter out unwanted photos, using the photo data information fields. If you create a Photo Report but later import additional photos to the same

Project Name, Site Name, and Phase Type within NCompas Media, the new photos that meet the report's existing Filter By will be added to the report automatically.

**Order By** — sort the displayed photos by any of the data information fields (Azimuth, Camera, Chainage, Date Taken, Discharge, Project Name, Transect, etc.).

**Photo Picker** — select only the specific photos you would like displayed in the Photo Report. Using this tool creates a static report. Meaning that the photos you select in the photo picker are the only photos that will show up on that report even if additional photos are added to the database after the report is saved. You would have to manually select the new photos to add them to the report.

**Drag and Drop** — manually re-order photos in a photo report. You can also right-click on a photo to **Edit** or **Remove** the photo from the report. If you initially built the report with **Filter By** and you remove a photo a filter will be added to exclude this photo. If the report was initially built with **Photo Picker** the photo will be removed from the list of selected photos in the photo picker.

### 7.1.1 Filter By

If your project has multiple Phase Types or multiple Site Names, you may wish to make a report showing photos from only one Phase, Site, Date Taken, etc. This can be done by using **Filter By**.

[22-filter\_by\_1.png]

- Click Filter By
- To add a constraint, select the **+** button. A new filter constraint will be displayed. To change the attribute it is filtering by, click on the attribute (e.g., Azimuth) and select from the displayed list.
- By default, the filter will add the operator “Equals” after the attribute. Click on “Equals” and you can change the operator to Equals, Does not Equal, Is greater than, Begins with, etc.
- In the Value box select the values you want the photos to be filtered by.

[23-filter\_by\_2.png]

[24-filter\_by\_3.png]

- You can add multiple filters. But, *you must choose the highest level or coarsest filter first*. Then select the next filter, ensuring that the search criteria gradually become finer and finer.
- Once you have added your filters, select **Apply Filter**.

### 7.1.2 Order By

The order in which photos are displayed can be defined using the **Order By** function.

- Select **Order By**. Under the **Column Names** box you have the option to order your photos by any of the existing attributes (e.g. Camera, Date Taken, Photo Name, Photo Number, Chainage, etc.)
- You can order by several attributes by choosing and adding them one at a time. After selecting each one, click **Add Column** to apply it. Always ensure that you select the coarsest or highest level attribute first. Click **Apply Order By** to apply the criteria to the report.

[25-order\_by.png]



### 7.1.3 Photo Picker

The Photo Picker tool is used to select specific photos that you may not be able to select using the **Filter By** tool.

- Click **Photo Picker** and select or deselect the photos that you want to appear in the report.
- Clicking once on an individual photo will bring up the photo on the right and allow you to make any last changes to the photo captions.
- When you are ready to create the report, click **Apply Photo Picker**.

[26-photo\_picker.png]

#### 7.1.3.1 Drag and drop and photo reordering

You can quickly re-arrange the order of the photos in NCompas Media Photo. Click on the **square grid symbol** at the top of the Reports toolbar to enter the “**Drag and Drop Mode**”. From there, the screen will show you all the sites and phases for that project as individual squares. You can drag and drop the sites and phases into any order. If you double click on one of the project site/phases, you will see the photos taken at that location. You can drag and drop individual photos within a given site/phase.

### 7.2 Caption Builder

The Caption Builder tool allows the user to add captions beneath photos in Photo Reports.

- To create captions, click **Caption Builder** on the top toolbar.
- Select from the **Column Names** drop-down box the data fields that you want to include. Select a data field to add to the caption and then click **Add Column**.
- The order in which you select the data fields in the Select Photo Report Fields window is the order in which this data will be displayed in the caption. To remove a data field from the caption, click it and select **Remove Selected Column**. **Remove All Columns** will remove all data fields from the caption.
- Once you have selected all the elements you want to add to your caption, click **Apply Caption Builder**.

[27-caption\_builder.png]

#### 7.2.1 Photo Information

The **Photo Information** tool along the top of the Reports toolbar allows the user to toggle on and off the name of the person who entered the photo data and who took the photo. If you want to display this information on the report, click **Photo Information** on the top toolbar. Click it again and the information will not be displayed.

### 7.3 Configure reports

You can modify the caption text font and the number and size of photos displayed per page in the final PDF report. To change the font and number of photos per page in the photo report:

- Click the symbol with the three dots at the far right corner of the NCompas Media toolbar.
- Select **Report Settings**.
- Choose the font to be used in report captions from the **PDF Caption Font** dropdown menu.
- Identify the number of photos to be displayed per page in the **Photos Per Page** box. When an odd number of photos per page is chosen, the change will not be visible in the main “NCompas Media Photos By Projects Media” report view, but will be applied when the PDF report is generated.
- Click **Save**.

[28-configure\_report.png]

## 7.4 Hide/show page numbers

Page numbers on the bottom right corner of a “photos by project media” report can be turned on or off:

- In the **Tools** menu select **Manage**.
- Click on **Hide Page Number** if you do not want to display page numbers on the photo report. To show page numbers, click the **Hide Page Numbers** title again. The checkmark will not display to the left of Hide Page Numbers title.

[29-hide\_show\_pg\_no.png]

## 7.5 Manage photo borders

NCompas Media photo reports can be created with or without square borders around each photo. To toggle photo borders on and off:

- Open **Tools** from the main file menu and select **Manage Photo Borders** and select ‘**On**’ or ‘**Off**’.

## 7.6 Saving a report and opening a saved report

Photo Reports can be saved in NCompas Media, allowing you to pick up where you left off and continue making report edits later without having to start from scratch. Click **Report** and then **Save**. You will be prompted to name your report.

To re-open a previously saved report:

- Click **Reports** to access the reports toolbar.
- Select **Report** and then **Open**. Navigate to the Photo Report you want to continue editing.
- Select the report in the list and then click **Open Report**.

## 7.7 Convert a finished report to PDF

To export your report as a PDF click **Report** and then **Convert to PDF** and a preview of the PDF report will be generated. You can choose to save or print to a specific location.

## 7.8 Other types of summary reports

Some report types in the left side menu of the Reports screen below are not used to show photos but allow you to generate summary tables of different types of data.

- **Project Reports** provide a series of quick summary tables for Employees, Contacts, Clients, Project Classes, Locations, and Projects.
- **Photo Reports** can provide a series of quick summary tables for Employees, Subcontractors, Volunteers, Sites, Phase Types, and Phases

For these report types, click on a report name to generate a complete list of all data entries for that field type. Reports can be displayed in two different layouts (columns or rows).

The complete summary reports can be sorted, filtered, and re-ordered using **Filter By** function and **Order By** function. The Data Manager Tool allows you to alter the displayed column headings in any of the reports (See next section).

[30-summary\_reports.png]

## 8 APPENDIX I PHOTO DATA OPTIONS DEFINITIONS LIST

The standard option includes:

- **Camera:** the camera which was used to take the photo.
- **GPS Unit:** the appropriate GPS unit that was to collect for the photo location.
- **Latitude/Longitude:** the appropriate coordinates for the photo location.
- **Compass Declination:** either True or Magnetic north. If no compass reading was taken, Not Used would be selected.
- **Azimuth:** the compass bearing at which the photo was taken.
- **Display Order:** a value to each photo you enter under a particular Level 1, 2 and 3. (i.e. default display order is the order in when photos are imported)
- **Photo Station:** a marked, permanent location from which a photo is taken at a specific compass bearing (or series of bearings).
- **Comments:** any comments that were recorded at the time the photo was taken or a photo description.

The tracking option includes:

- **Site Name (Level 2):** The main “chapters” of your report and the second coarsest filter for sorting. These are sub-sections below Level 1 for photo sorting.
- **Phase Name (Level 3):** Third level headings used to organize photos in the media report. These are the second level sub-sections below Level 2 for photo sorting. (see tree figure on section 4.4)
- **Employee:** The name of an individual working for the company who is using NCompas Media to manage photos – no company name or address is attached to this individual in the database as the company is implied by the software ownership. Employee name is used to populate database fields such as: project manager, photographer, and writer which are associated with photos and can be used for tracking, sorting and filtering.
- **Volunteer:** A person who voluntarily takes and submits photos to the users of the NCompas Media database. This person is not considered to be a company employee and therefore their mailing address is included as an additional means of contacting this person. Volunteer name is used to populate database fields such as: photographer and writer which are associated with photos and can be used for tracking, sorting and filtering.
- **Subcontractor:** Subcontractors typically perform paid work for another company other than their own. For this reason, a company name is listed for each subcontractor along with relevant contact information. Subcontractor name is used to populate database fields such as: photographer and writer which are associated with photos and can be used for tracking, sorting and filtering.
- **Cross Section:** Cross sections are typically used in surveying. This field is intended to identify the cross section number associated with the photo.
- **Flow Taken:** identify if a flow measurement was taken with the photo
- **Discharge:** The volume rate of water flow. This field identifies the discharge of a waterway at the time the photo was taken.
- **Gauging Station:** Gauging stations are used during flow surveys. Gauging surveys typically include multiple photos. This field is intended to identify the gauging station name/identifier for where the photo was taken.

- **Orientation:** a short description of where the photo was taken.
- **Reach:** identify the stream reach in which the photo was taken.
- **Chainage:** appropriate stream length or transect from which the photo was taken.
- **Profile:** appropriate survey profile correlating to the photo.
- **Transect:** appropriate transect # correlating to the photo.
- **Target:** a short description of the photo's target.