

# GETTING STARTED 2

## Staff and Member Roles

This document will explain the different member roles in Mediagraph, and when and how to assign them.

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# 1

## About Staff and Member Roles

Roles determine what members can view and do in MediaGraph. There are staff roles designed for the management of users and content, and non-staff roles that give members access to the Library. There is also a “role” for people who are not members of the account, which we call Public.

In this section, we’re going to illustrate the access and capabilities of a role by looking at the MediaGraph interface. You will see that the items which are visible are directly tied to the roles capabilities and permissions.



### No limitation to the number of users in a role

Most DAM applications limit the number of members or staff users, and charge you more for additional “seats”. MediaGraph lets you have as many people in each role as you need.

But just because you can, does not mean you should, at least to start. We suggest that you limit the staff roles to a small number of people as you are getting up and running.

## ALL ROLES

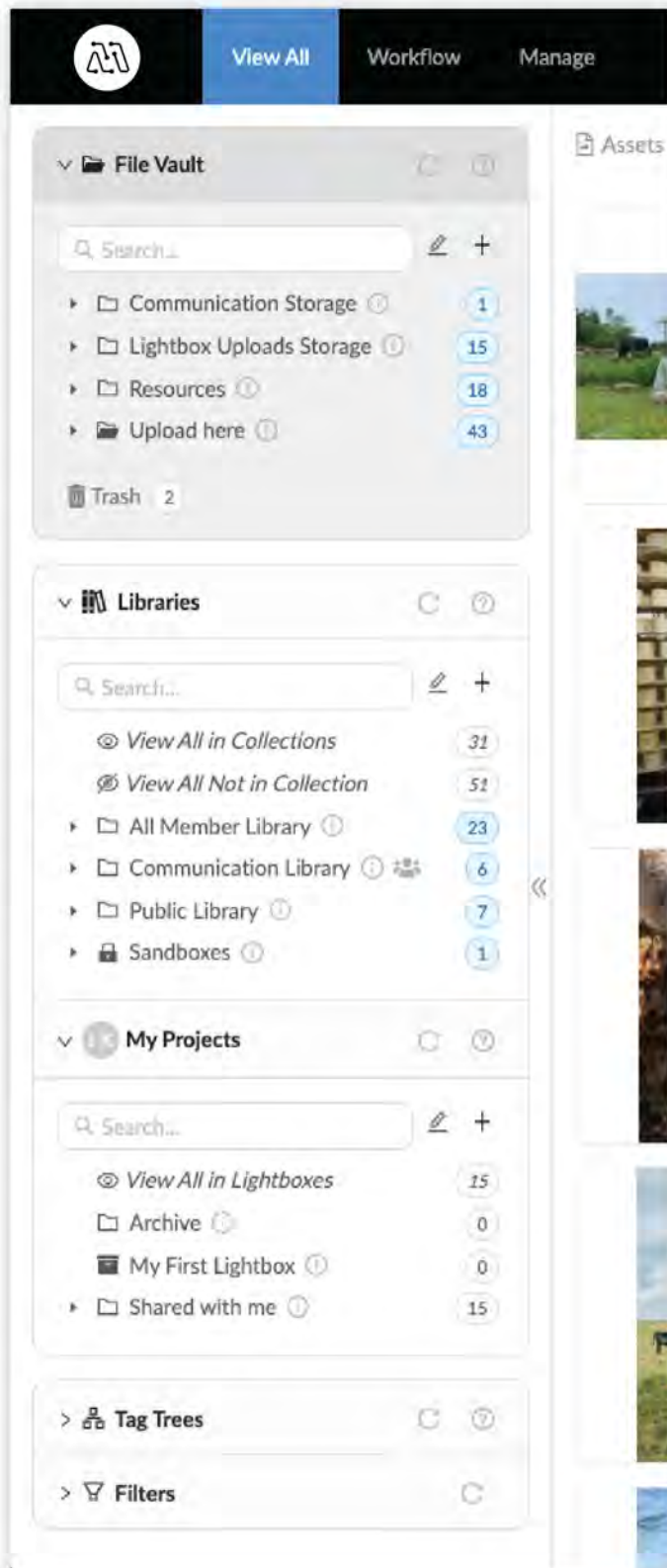
User roles are tightly integrated with what’s visible to you in the account. Let’s start by seeing how your role determines what you can see. In this section you’ll see a description of the role, and the different view each one has of the same account. This should help you to understand how to structure your account.

Here are the roles that exist in a MediaGraph account.

- **Owner** - Full control over the account, including billing/payment, and the ability to delete the account
- **Admin** - Full control over the account, including billing/payment.
- **Global Content Manager** - Control over all users, content and groups.
- **Global Library Manager** - Full control over the Library Collections.
- **Global Tagger** - Permission to add certain metadata to all files in the Libraries.
- **General Member** - Access to files in the Library per member permissions.
- **Restricted Member** - Access to a specific Lightbox, as well as public facing Collections.
- **Public** - Access to public facing Collections, if they exist.

## ADMIN VIEW OF MEDIAGRAPH FRONT END

As an **Admin** or **Owner**, you can see and edit all front-end components (File Vault, Libraries, Tag Tree etc.) and have full control over the account (accessed through the Manage tab). In the following pages, you'll see how many of the elements shown here are hidden from lesser privileged roles.



### File Vault

The File Vault is where you manage the storage of assets for the account. This is typically the best place for an Administrator or Content Manager to upload files into the account.

Only Admins and Content Managers can see the File Vault.

### My Projects

All members of your Mediagraph Organization, even restricted members, have their own personal Project Panel where they can create Lightboxes and collaborate with other members.

### Libraries

Libraries are the primary tool for making content available to your members. At the end of this document you will learn how to make an All-Member Library.

### Tag Tree & Filters

Apply keywords and use metadata to filter assets. What members see here is conditional on their role.

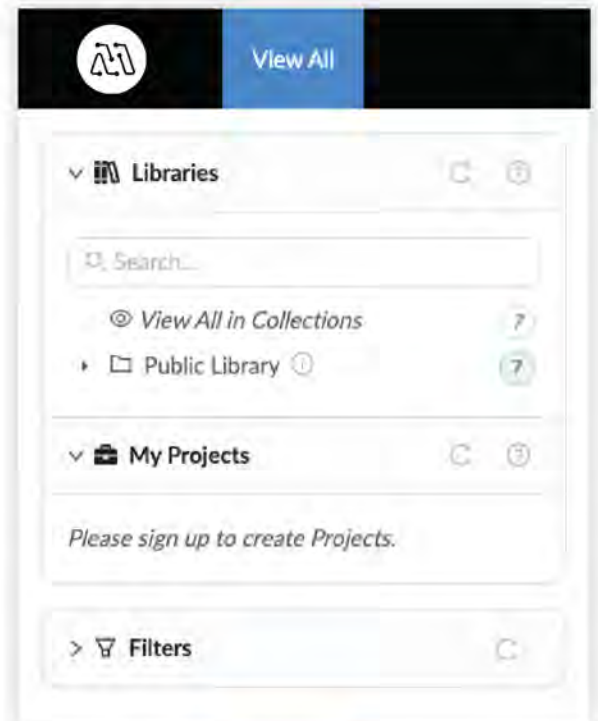




## PUBLIC / NOT LOGGED IN

A visitor to the site who does not have an account, or who is not logged in has very limited access to the material. For the purpose of this document, we will call them Public users, even though it also applies to people with an account who are not logged in at the moment.

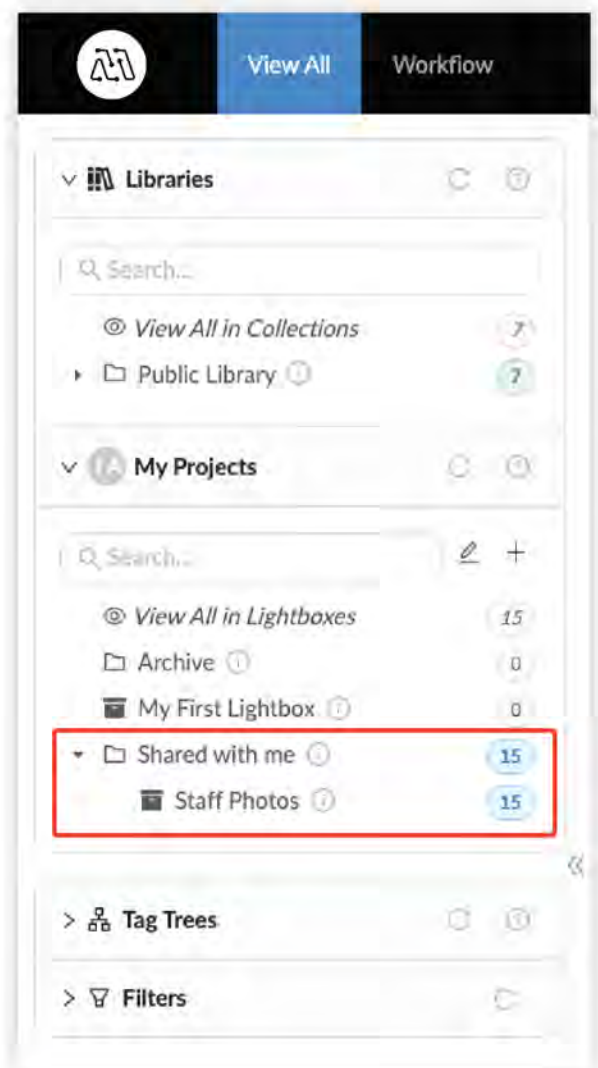
- They only see Collections which have Public permissions attached.
- Public Users cannot see the tag tree, or any of the metadata filter
- Public users cannot make Lightboxes.
- You have full control over what Public users see, and what their download access is.



## RESTRICTED MEMBER

When one of your members invites someone to collaborate in a Lightbox, they are granted a restricted membership to the account.

- A restricted member is essentially a Public user with specific Lightbox access.
- Restricted members can view Libraries and Collections that have public permissions.
- They can also see Lightboxes that have been shared with them.
- They can see a partial view of the Tag Tree. They only see tags which are applied to files they have permission to view.





## GENERAL MEMBER

For most accounts, the majority of users are General Members. This could include everyone from your organization. General Members have all the permissions of Restricted Members, plus access to an “All Member” Library if you have created one.

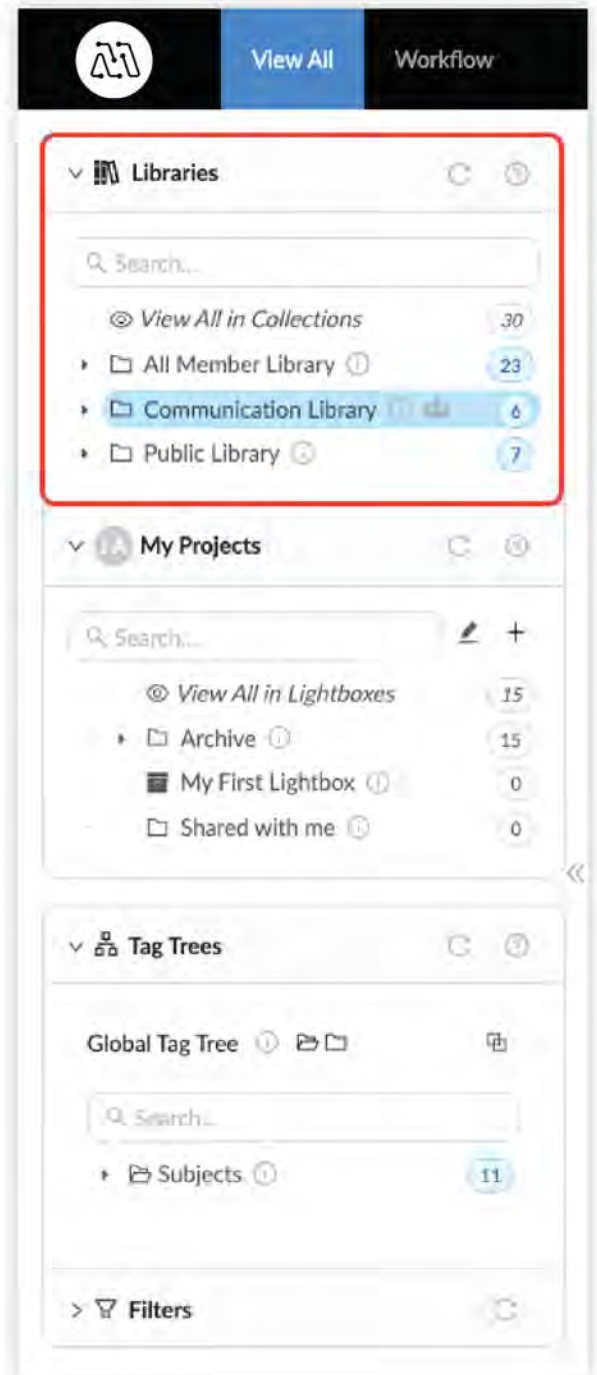
- They can access any Libraries which have “All Member” permissions.
- They may also be able to access other Libraries through specific Group membership.
- They have no access to Management functions or the File Vault.
- They can only tag files which they have personally uploaded, and they have limited upload paths (specific Lightboxes or Group contribution requests).



### Group Library

The All Member libraries are accessible to anyone who is a General Member of your account. You can also create group libraries which are accessible by members of the specific Group, and invisible to General Members.

You can read more about Groups in the Knowledge Base, and in a Getting Started Guide for Groups.





## GLOBAL TAGGER

The tagger role is built for junior staff. In this role, they can help with the time-consuming metadata work. They are limited to adding metadata to files.



### Staff Roles

All of the following roles have some level of “staff access.” This means they can add or modify content in some way. We will start with the least permissioned staff roles and work up to the account owner.

- Global Taggers can see the staff-only Sandbox Collections.
- They can create and assign tags on all assets in the Library Panel.
- They **cannot** edit any Collections or the Tag Tree.
- Taggers **cannot** access the Manage tab or the File Vault.



### Tag Mode

Taggers and above can enter Tag Mode by clicking on the tag icon in the upper right corner of the Tag Tree panel. When in Tag Mode you can see all keywords in the tag tree (including ones that have not yet been assigned) and quickly add/remove tags from assets.

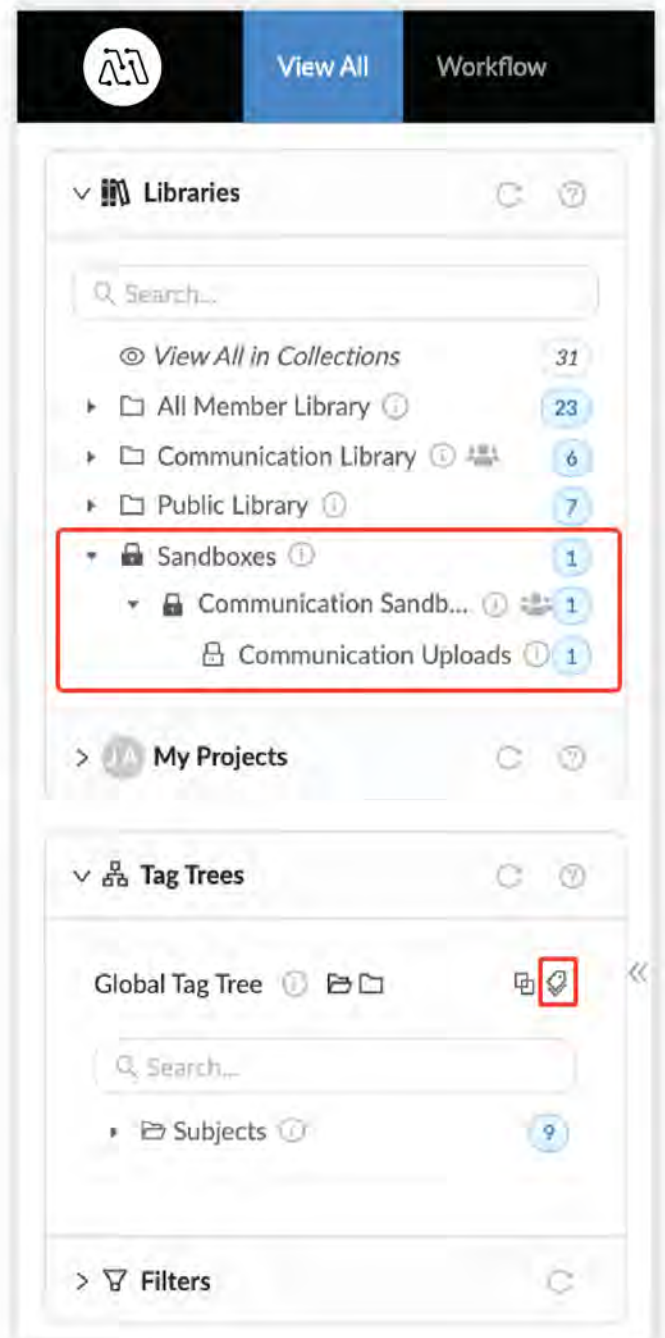
[Learn more about how to use Tag Mode](#)



### Sandboxes

The Sandboxes are a part of the Library that can **only be accessed by staff members**.


Sandbox Collections are useful for the preparation of files for inclusion in “regular” member-facing collections (i.e. sorting through member uploads, organizing into new Collection trees and tagging).

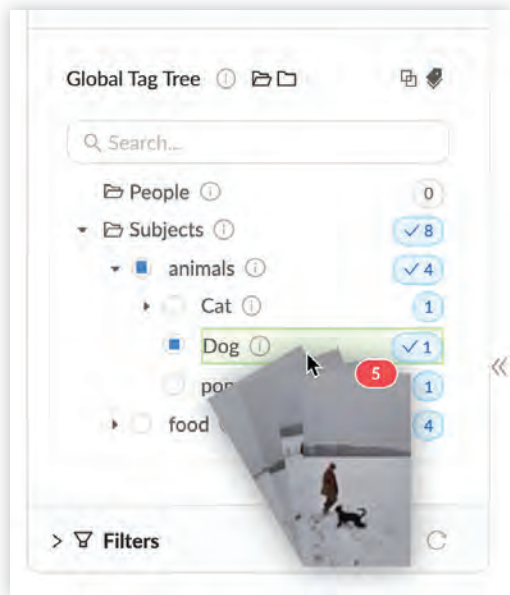




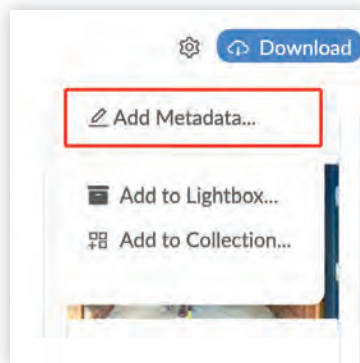
## Adding Metadata

There are several different ways to add metadata to assets:

1. Drag and drop one or more files onto a tag in the Tag Tree when in Tag Mode.
2. Tag multiple files using the  action menu.
3. Tag files individually in the asset detail view.
4. Tag files one at a time in table view.

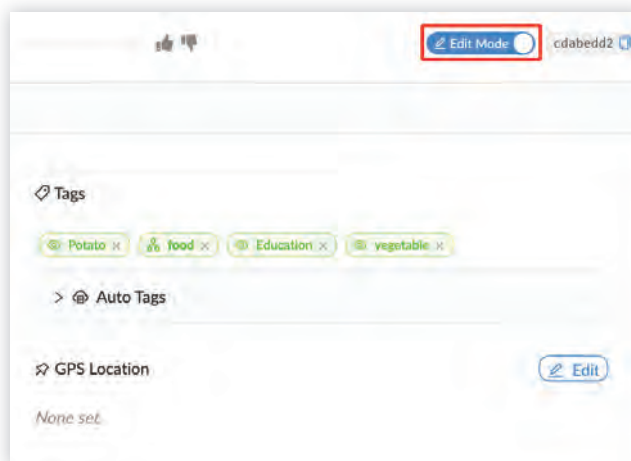


- 1 Drag and drop assets onto a tag or click the circle next to a tag to apply the tag to selected images.



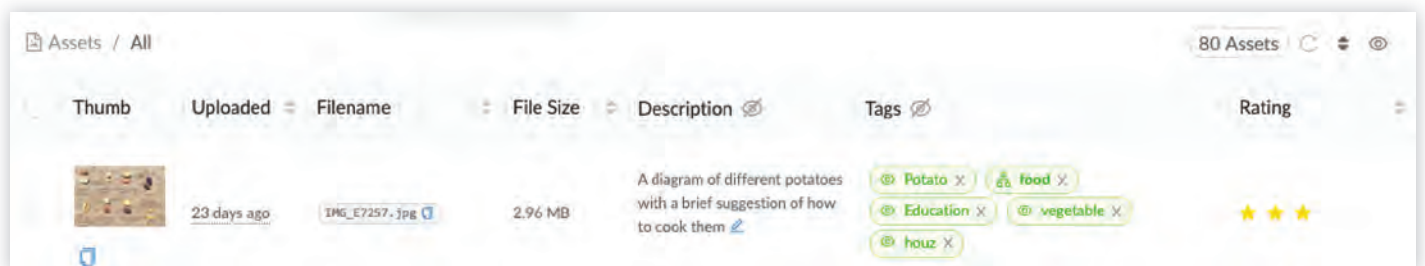
2

Use the action menu to tag all selected files.



3

Double click an image to enter asset detail view. Here you can enter “Edit Mode” and add metadata to assets one at a time.



- 4 Table view makes it easy to add descriptions, and lets you see searchable and blocked tags.

### Known Issues

General Members and Taggers will see “Add to Collection...” in the action menu even when they don’t have permission to add assets to a Collection.



## GLOBAL LIBRARY MANAGER



The Library Manager role is built for more senior staff. This staff role has complete control of the Library panel, but has limited control over the assets and management operations. Global Library Managers have all the permissions of a Tagger, and the ability to:

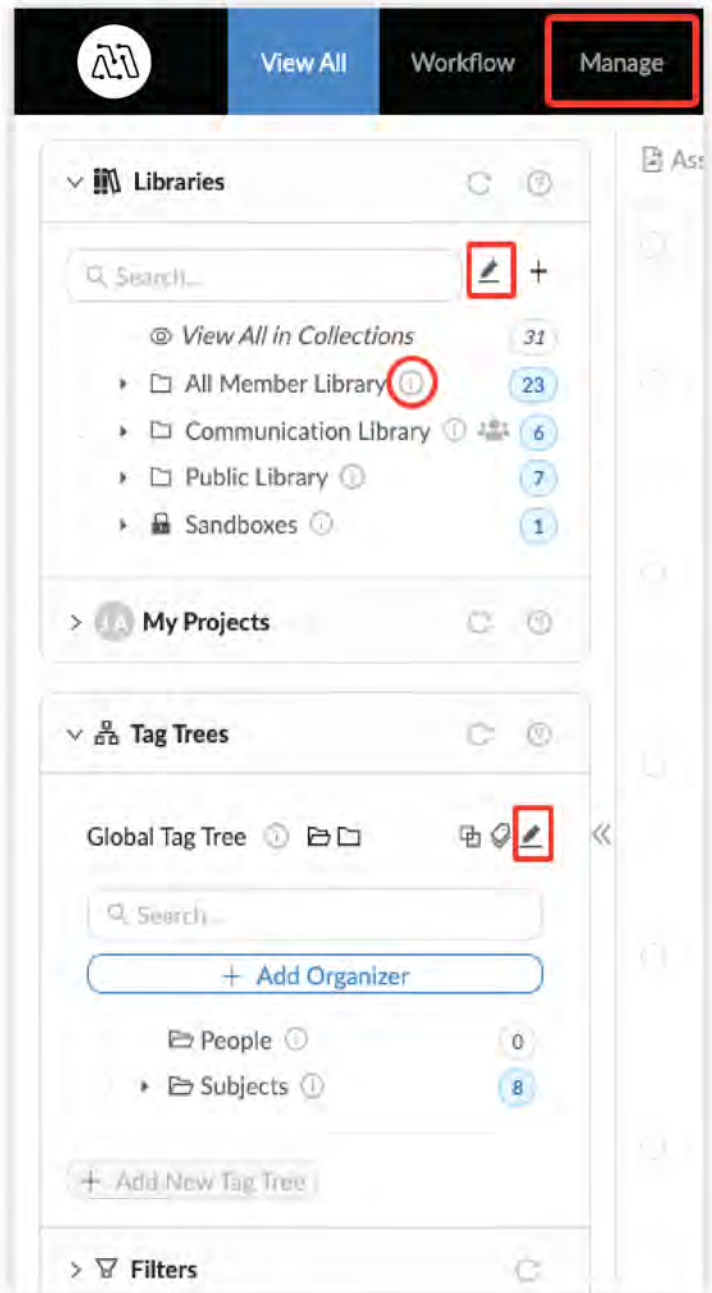
- [Create](#) and [edit](#) Library Collections (including permissions).
- [Remove assets from Collections](#), but **not** delete assets from the account.
- Invite and manage members.
- [Edit the Tag Tree](#).
- Can [switch to user](#) for general members and taggers.
- They can only upload assets when given permission by Content Managers.
- Create and manage assets and members of [Group Libraries](#).
- Access to sensitive content, can view images tagged as [NSFW](#).

### The Manage Tab

The Library Manager has access to the Manage tab, where they can invite members, create and edit Groups, manage Collections and the Taxonomy.


### Managing Libraries

- Enter  Rearrange Mode to move Collections around.
- Use the  info pop-over to edit basic Collection information and enter the manage panel to edit permissions.



### Building the Tag Tree

Library Managers and above are responsible for building your organization's Tag Tree.

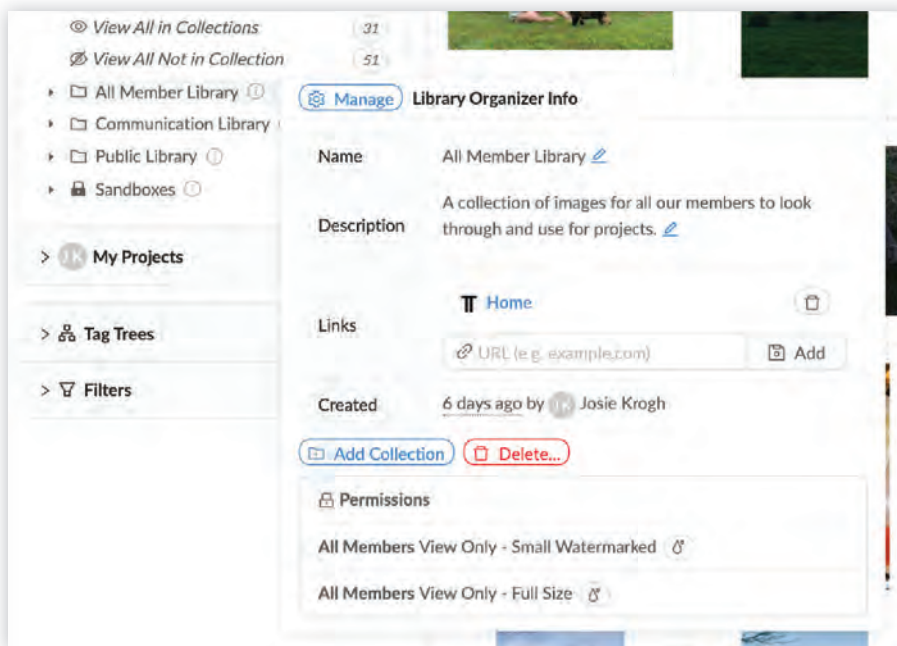
The Tag Tree is a way to visually organize and present tags that are important to your organization. They make it easy for members to explore and filter assets. Enter  edit mode to add, remove and rearrange tags in the Tag Tree.



## Management Functions

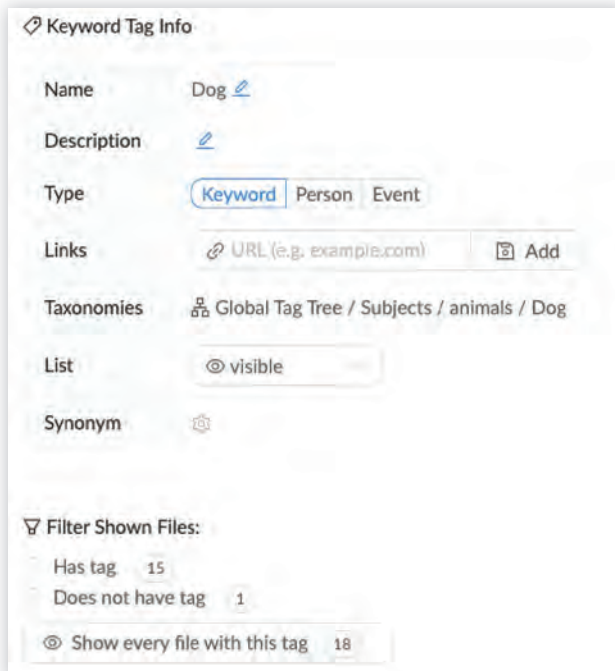
Library Managers and above have access to management elements not visible to general members or taggers.

1. Collections can be managed in the **i** info pop-over.
2. Tags can be managed in the **tag** pop-over.
3. Library Managers do have access to the **Manage** tab where they can edit Groups, invite members and perform other management functions.



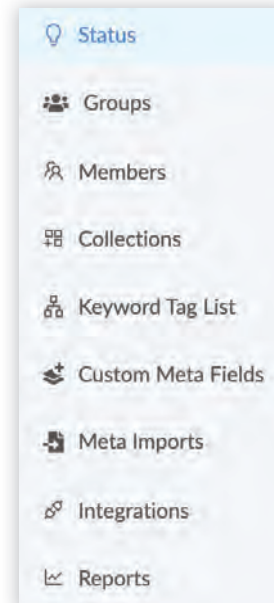
**1**

Library Manager can edit Collections in the info pop-over where they can edit name, description, add links or enter the manage panel to edit Group permissions.



**2**

Mouse over a tag anywhere in Mediagraph to open the tag pop-over. Here you can edit tag info and apply it as a filter.



**3**

These are the management functions Library Managers have access to.



## GLOBAL CONTENT MANAGER

This staff role is meant for someone who you trust to manage all your assets and members. Only Content Managers and above can upload assets directly to the File Vault and allow other members to upload assets.

Since Global Content Managers have the power to upload and delete assets as they see fit, it is important these individuals possess a deep understanding of your organization's DAM needs, and how to use the Mediagraph platform.

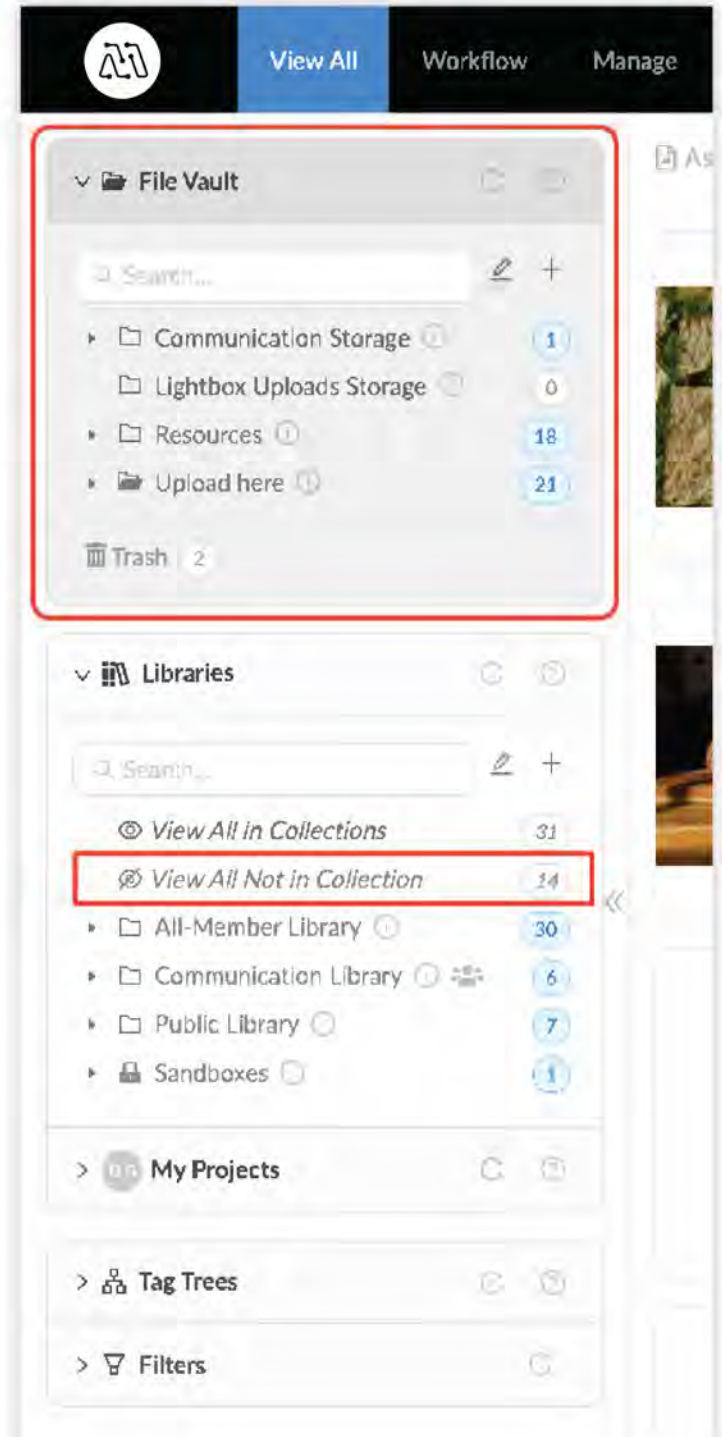
Global Content Managers have all the permissions of a Library Manager, plus the ability to:

- Upload files and edit the structure of the File Vault.
- Allow **any** other members to upload files.
- Delete assets and storage folders from the account.
- Move assets to the Library to make them accessible to members.
- Create a Group storage folder and enable Group contributions.

### The File Vault

The File Vault is where you manage the storage of assets for the account.

- Enter Rearrange Mode to move Folders around.
- Use the info pop-over to edit basic Folder information and duplicate to Collections.



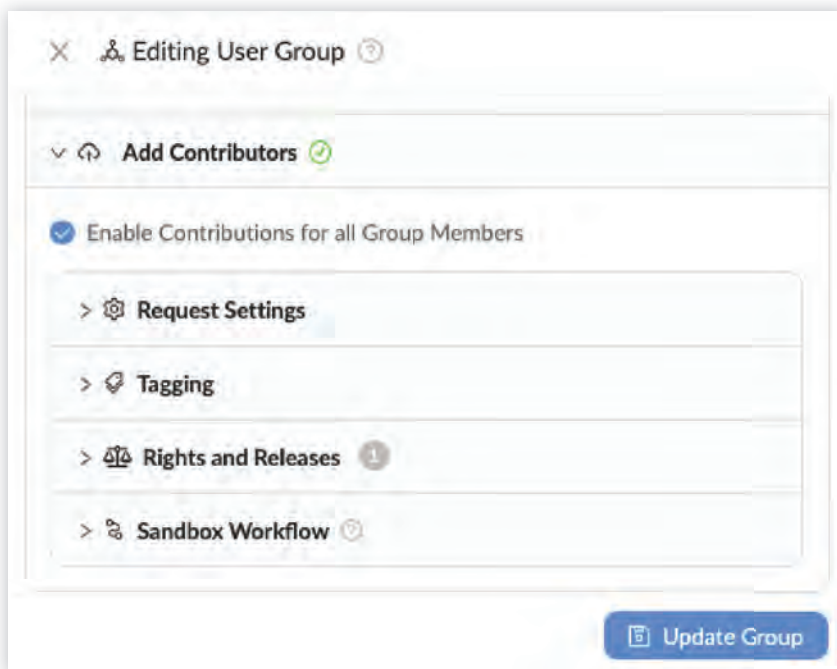
Notice Content Managers can see an item in the Libraries panel, "View All Not in Collections". This will show the Content Manager any files which are in the File Vault, but which have not been assigned to a Collection.



## Managing Uploads

Global Content Managers are responsible for managing all the assets in your account. Aside from uploading assets directly from their computer, they also have the ability to enable uploads from other members and link external accounts to streamline workflow.

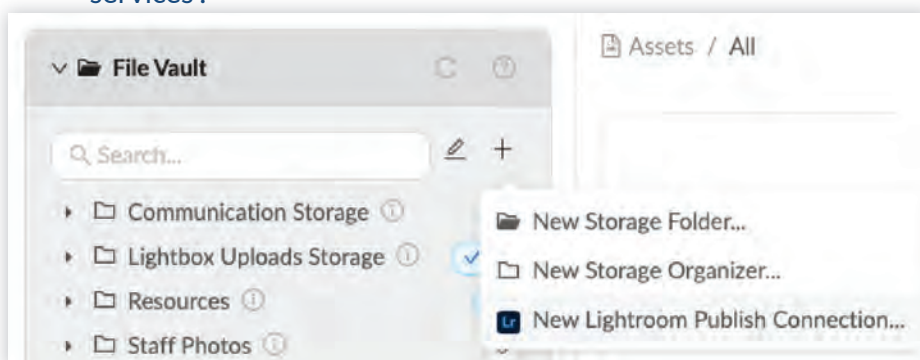
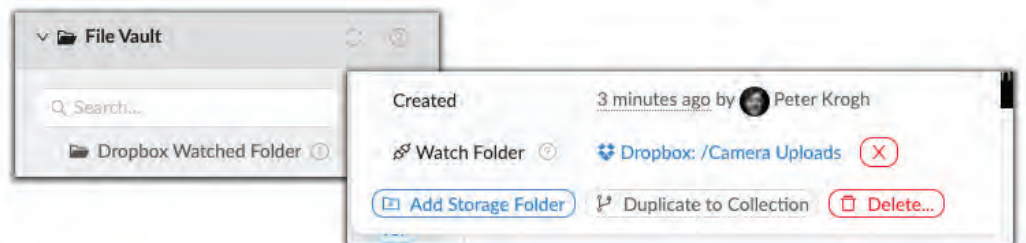
1. Create a **Group upload request** to allow uploads from general members.
2. Link “watched” folders on **Box and Dropbox** to Mediagraph storage folders.
3. **Connect a Lightroom Classic catalog** to your Mediagraph account through the **Publish Services Plugin**.



# 1

Group upload requests are an easy way to grant general members upload permissions. You can choose where Group uploads will be routed to in Mediagraph.

2 Assets in “watched” folders on Box and Dropbox are automatically downloaded to Mediagraph whenever files are added on those services.



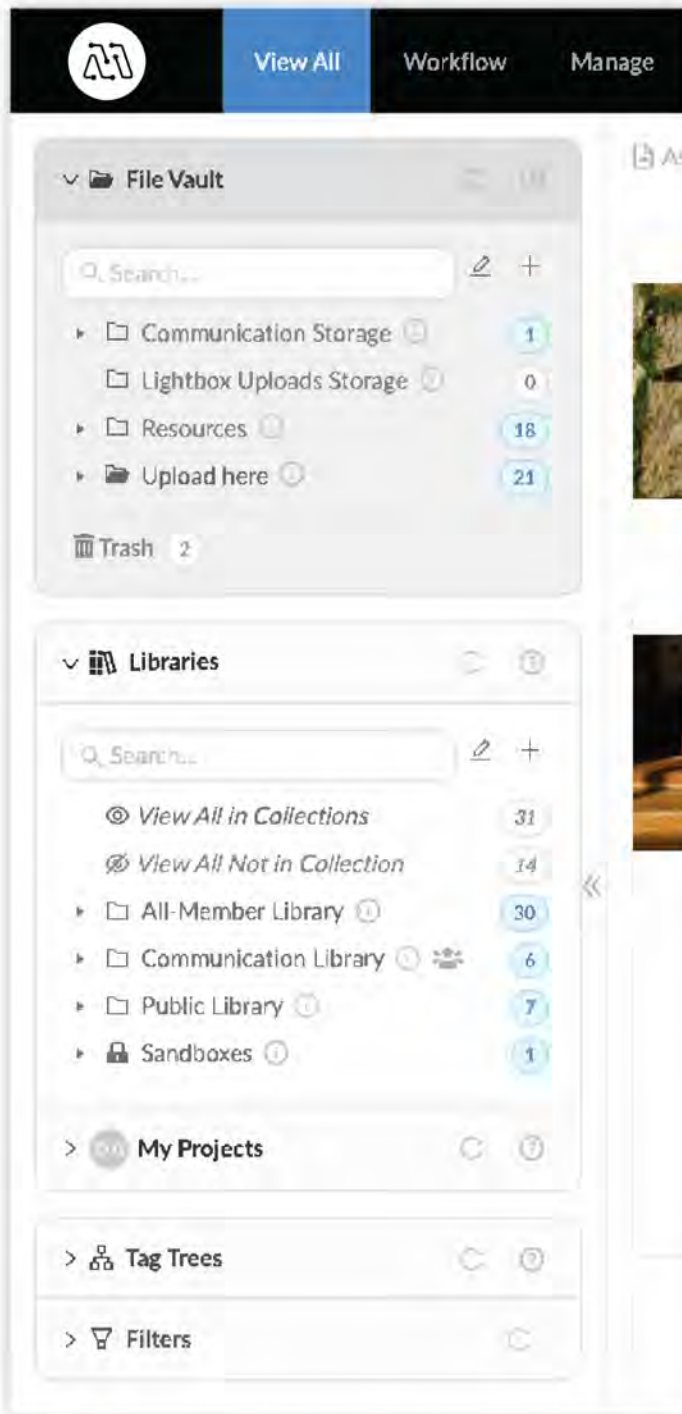
# 3

Create a new Lightroom Publish Connection to seamlessly integrate your Lightroom Classic catalog with Mediagraph.



## ADMIN/OWNER

Admins are the most senior staff role in Mediagraph. They have control over the entire Mediagraph account, including the File Vault and all Management functions. **The only difference between an Admin and an Owner is that there can only be one Owner, and that is the only person capable of deleting your Mediagraph account.**



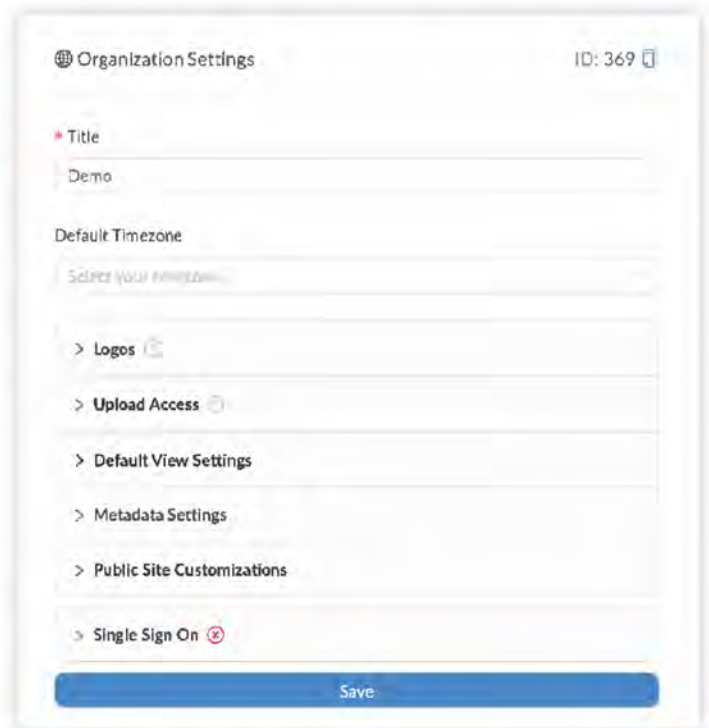
Admins and global content managers have the same view of the front-end of Mediagraph.

Admins have all the privileges of a Content Manager, plus the ability to:

- Edit and assign rights packages.
- Control subscription plan and billing.
- Edit site settings.

In Site Settings you can:

- Choose the minimum member role that can [upload directly to lightboxes](#).
- [Enable auto-tagging](#) and [NSFW detection](#).
- Edit the look of your site: logo, header, default view settings and login page.



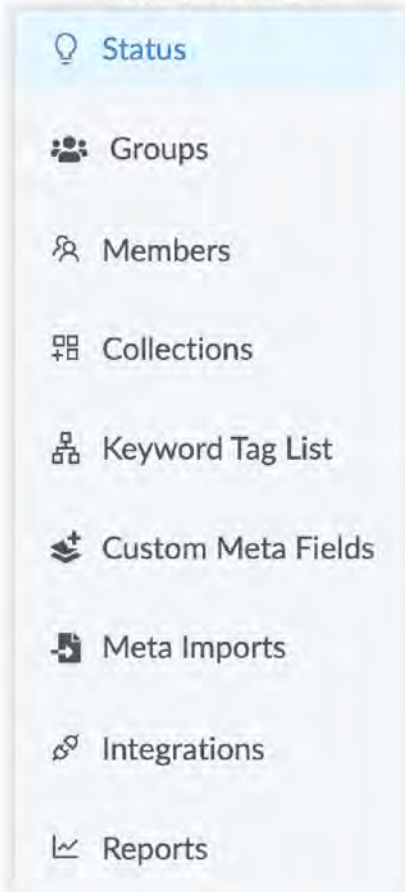
Only Admins and Owners have control over Site Settings.



## Account Management

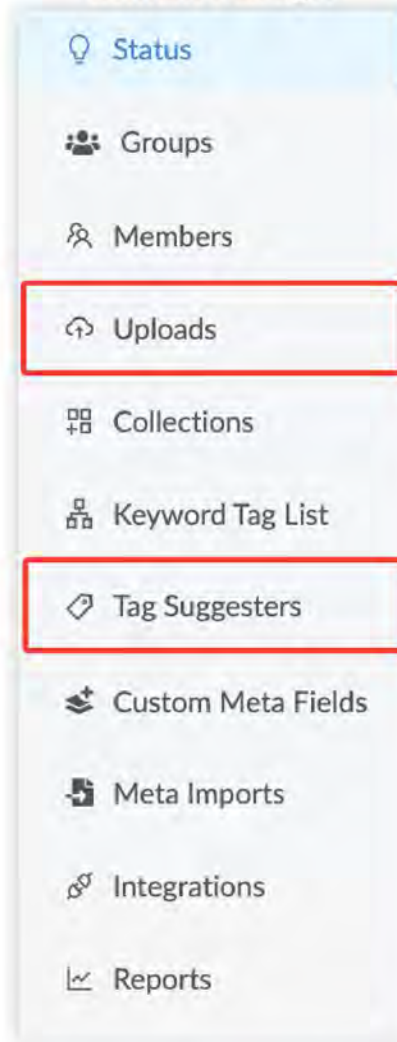
Library Managers, Content Managers and Admins all have access to the Manage tab, but what they have permission to see and edit is dependent on their role. Take a look at the three different views of the account management menu to see how access changes.

### Library Manager



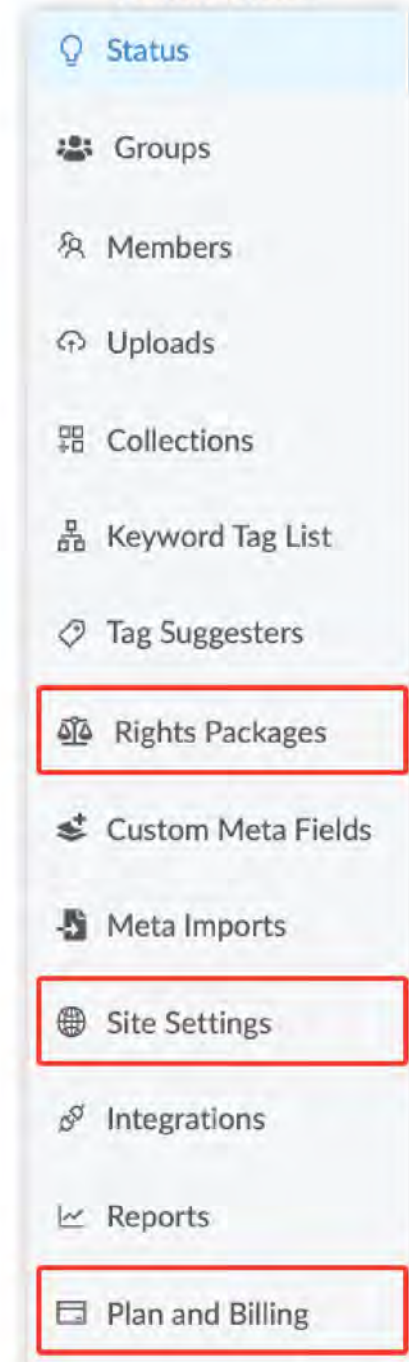
Library Managers can invite members, manage groups, edit Collection permissions and more in the Manage tab.

### Content Manager



Content Managers have the added ability to manage upload settings and tag suggesters.

### Admin/Owner



Admins and owners can control rights, site settings, and billing.



# 2

## Assigning Roles

Now we will show you how to assign roles. You can assign roles to members when you first invite them or go into your account management and edit existing member's roles.

Library Managers, Content Managers, Admins and Owners are all allowed to invite members and edit a member's role. However, a user can only assign as high as their role (i.e. A Library Manager can make a user a Tagger or Library Manager, but not a Content Manager).

### ASSIGN ROLE UPON INVITATION

Follow these steps to invite new members to your Mediagraph account.

1. Click **"Manage"** to enter the management area of your account.
2. On the left side menu, click **"Members"**.
3. Click the **"+ New Invite"** button.
4. Enter the email addresses of the people you would like to invite. (You can paste in multiple email addresses separated by commas or semicolons.)
5. Include a note to give them a little more context for the invite (optional).
6. Select a role for your new member.
7. Select a destination Collection for them to be taken to after they sign-up (optional).
8. Click **"Create Invite"**. Emails will be sent inviting these people to join your Mediagraph organization.

The Member invite dialog.



## EDIT AN EXISTING MEMBER'S ROLE

Follow these steps to change an existing member's role.

1. Click **"Manage"** to enter the management area of your account.
2. On the left side menu, click **"Members"**.
3. Locate the member whose role you'd like to change.  
Click the **Role** dropdown menu, select the desired role.
4. Membership is automatically saved.

The screenshot shows the TandemVault user interface. At the top, there is a navigation bar with 'View All', 'Workflow', and 'Manage' (highlighted with a red circle '1'). Below this is a search bar. On the left, a sidebar menu contains 'Status', 'Groups', 'Members' (highlighted with a red circle '2'), 'Uploads', 'Collections', 'Keyword Tag List', 'Tag Suggesters', and 'Rights Packages'. The main content area shows a table of members with columns for 'Avatar', 'First Name', 'Last Name', 'Email', and 'Role'. The 'Role' column for the first member is open, showing a dropdown menu with options: 'General' (selected), 'Restricted', 'General', 'Global Tagger', 'Global Library', 'Global Content', and 'Admin'. A red circle '3' highlights the dropdown menu.

Avatar	First Name	Last Name	Email	Role
	test	Test	tester+1d43ba84@tandemvault.com	General
	test	Test	tester+76b3fdc5@tandemvault.com	Library Manager
	test	Test	tester+55987cd1@tandemvault.com	Member
	Upload	Test Test	tester+756a952f@tandemvault.com	Member


In the Member management area you can edit a member's role using the dropdown menu.

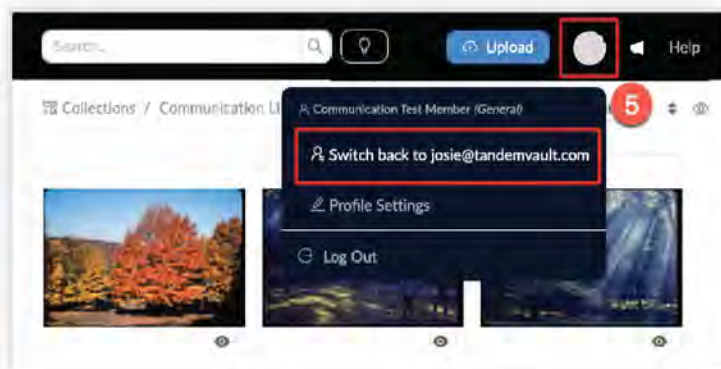
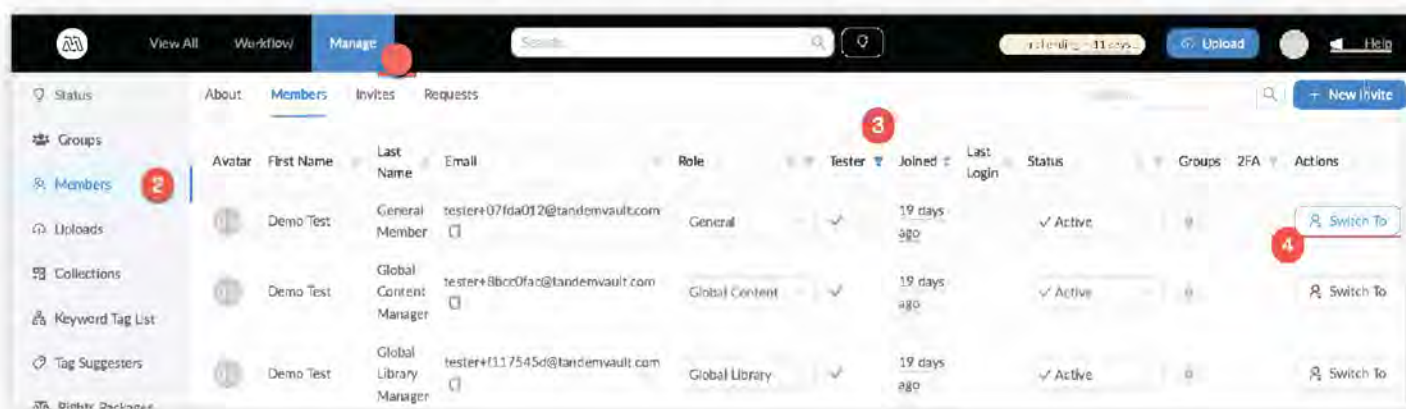


# 3 How to Preview Role Access

Now that you've learned about the different roles and how to assign them, take a minute to switch to each of the different roles in your account to see what they can access. Mediagraph lets you preview member access by using the "Switch To" command and has test accounts for each role in the account. It is useful to do this periodically to see what other users can preview.

## SWITCH TO A TEST USER

1. Click **"Manage"** to enter the management area of your account.
2. On the left side menu, click **"Members"**.
3. To display test accounts, click the filter  next to **Tester**. Select **"Tester"** from the dropdown. Click **OK**.
4. Locate the **Test General Member** and click the **"Switch To"** button at the far right. You are now viewing the account as a general member would.
5. After you have previewed a test member's access, switch back to your own identity. Mouse over the user profile menu in the top right corner and select **Switch back to yourname@email.com**.
6. Now that you're back in your main account, repeat steps 1-4 selecting a different role (Test Global Tagger, Test Library Manager and Test Content Manager). We suggest you switch in to each test user to confirm your understanding of the Role's access.







### Group Roles

In addition to the global roles outlined in this document, Mediagraph also supports group-based roles for members and staff. These are useful for partitioning access in the account for different departments or other groups. Roles include:

- Group Member - can access group libraries according to permissions
- Group Tagger - Can tag material in the group library
- Group Library Manager - Has control over the group library and membership
- Group Content Managers (Multi-department and Enterprise accounts only) - can access the group's partition in the File Vault.

You can read about groups in the Knowledge Base.  
And there will be a dedicated Getting Started Guide shortly.

## PREVIEWING PUBLIC ACCESS

There is no Public test user. Public access is equivalent to not being logged in. In order to preview public access, you can simply log out of Mediagraph in the user profile menu.

1. In your User Profile Menu, click Log Out
2. When you click View All in top navigation bar, you will see any Publicly visible files.