mediagraph

GETTING STARTED GUIDE

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MAY 2022

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MediaGraph Orientation

In this exercise, you will learn the basic structure of the TV3 account. You will see how files can be added to the account, and how members are given access to the files through the use of Libraries. You will also see how to verify access by switching to a member's view.

OBJECTIVES

- Upload files to the File Vault.
- Make files accessible to members through a Library.
- Preview member access.

About The File Vault

All the assets in your account are stored in the File Vault. As an Administrator or Content Manager, you can upload files directly into a folder in the File Vault. (There are several other ways to upload, which we will outline later).

TIP: Only Content Managers and Administrators can see the File Vault.

UPLOAD SOME FILES

In the first step, we will look at one method for upload - direct upload to the File Vault.

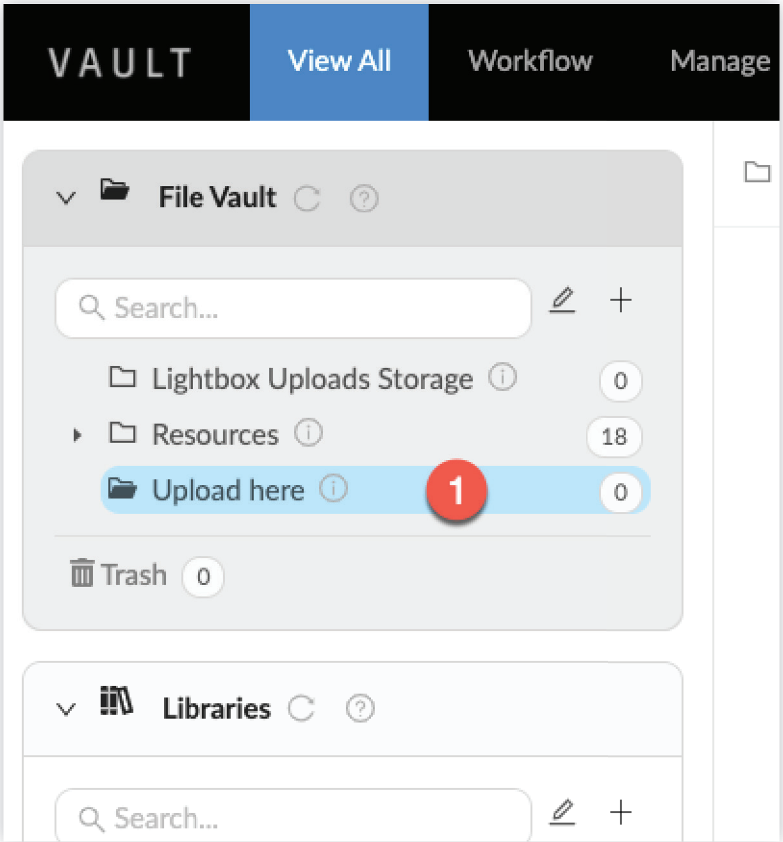
Upload files to a folder

We will start by uploading some files to see how the process works. Don't stress too much about what you will be uploading, or how it is organized. It can all be deleted or modified later. Remember, this is just a practice round.

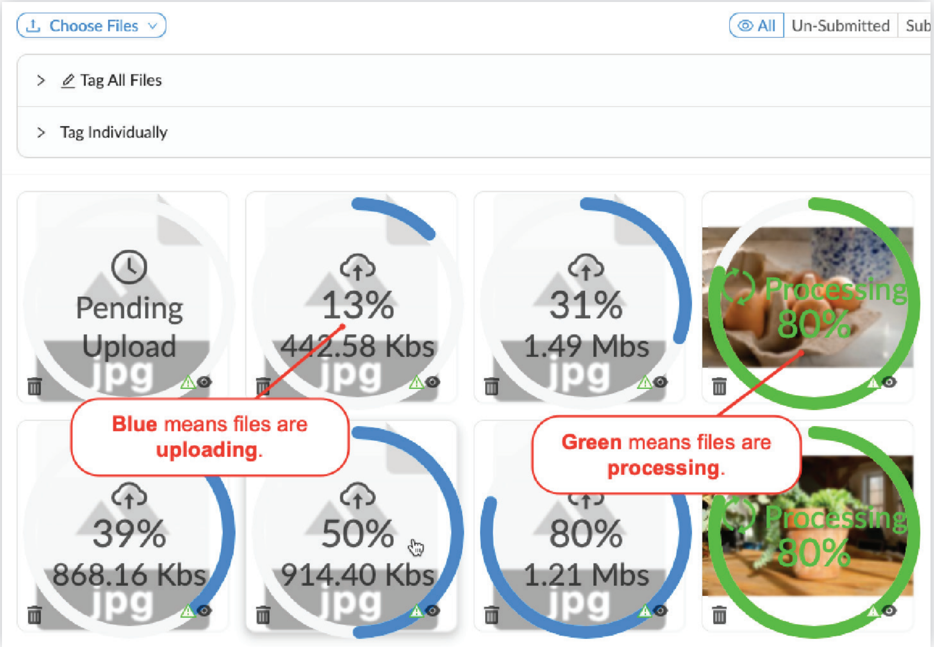
You should **gather a handful of files for this process.** Once you've done that, let's start the upload.

Here are the steps:

1. Open the File Vault panel **select the folder "Upload here".**
2. **Drag the files** into the MediaGraph window. The files will begin to upload.
3. **Very Important!** Don't navigate away from this page until the upload stage is finished.
4. After the files have uploaded, they will go through a processing stage.
5. **Congratulations!** You have completed your first Upload!



TIP: You must be selected on a Folder to upload assets. The icons are Organizers, which are used for organizing folders, not for storing assets.



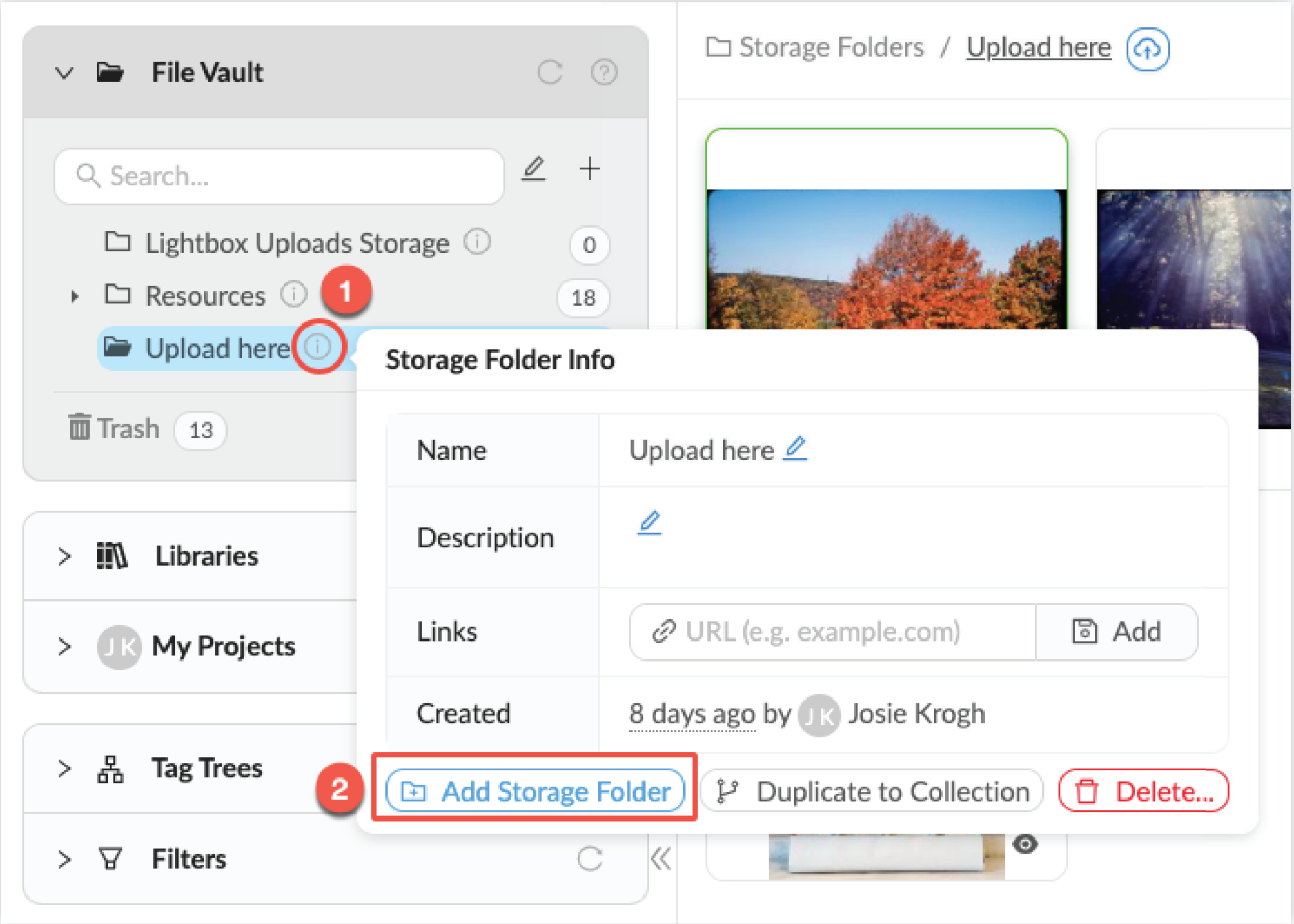
Do not navigate away from this page while files are uploading.
You can leave the page once all files are in the processing stage.

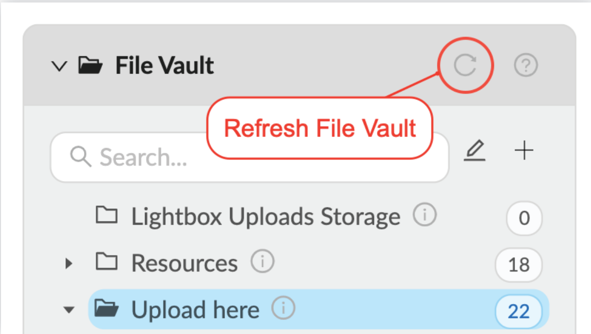
Organize Folders

While we're here, let's do a little clean-up. Let's make a subfolder just for these new items, and then add the files to the subfolder.

Here are the steps:

1. Mouse over the ⓘ next to the "Upload Here" folder.
2. **Click on "Add Storage Folder"** to make a new subfolder. Choose a name that is relevant to the files. Click **Create**.
3. **Select all the new files.** Click on the first file, hold the shift key, and click on the last file.
4. **Drag the files over to the new folder.** You will see the count in the new folder rise as the files are added. (You may need to click the Refresh icon to fully update the count).



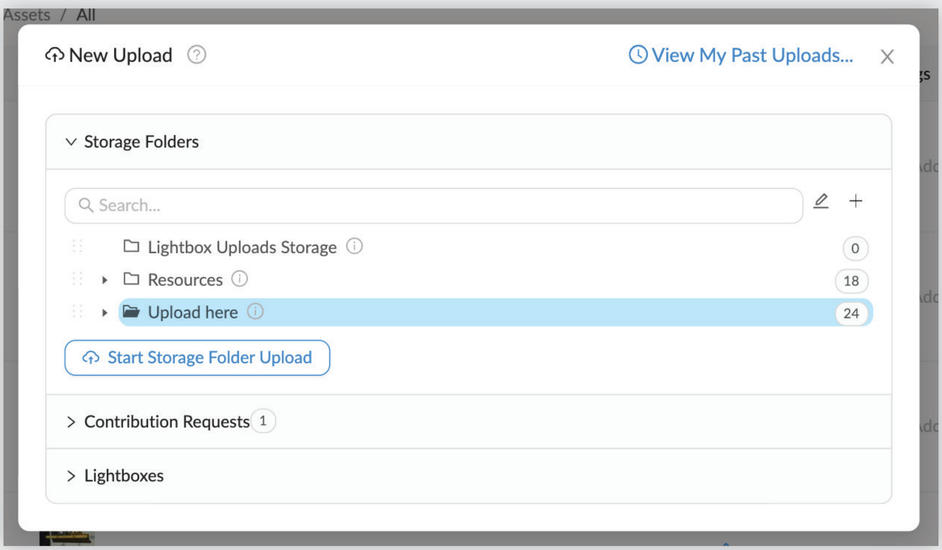


TIP: You will see Refresh icons in every panel. Use these to make sure the panels display up-to-date content.

Using the Upload Button

You can also start an upload by clicking the Upload Upload button. This will bring up a dialog box showing you all the upload methods that are available to you. This includes the File Vault, Group upload requests and Lightbox uploads.

Clicking on a storage folder in the upload dialog box will take you to the folder, and set it to upload mode. Click the links to read about other upload methods in our Knowledge Base.



Select the target folder for your upload and click Start Storage Folder Upload.

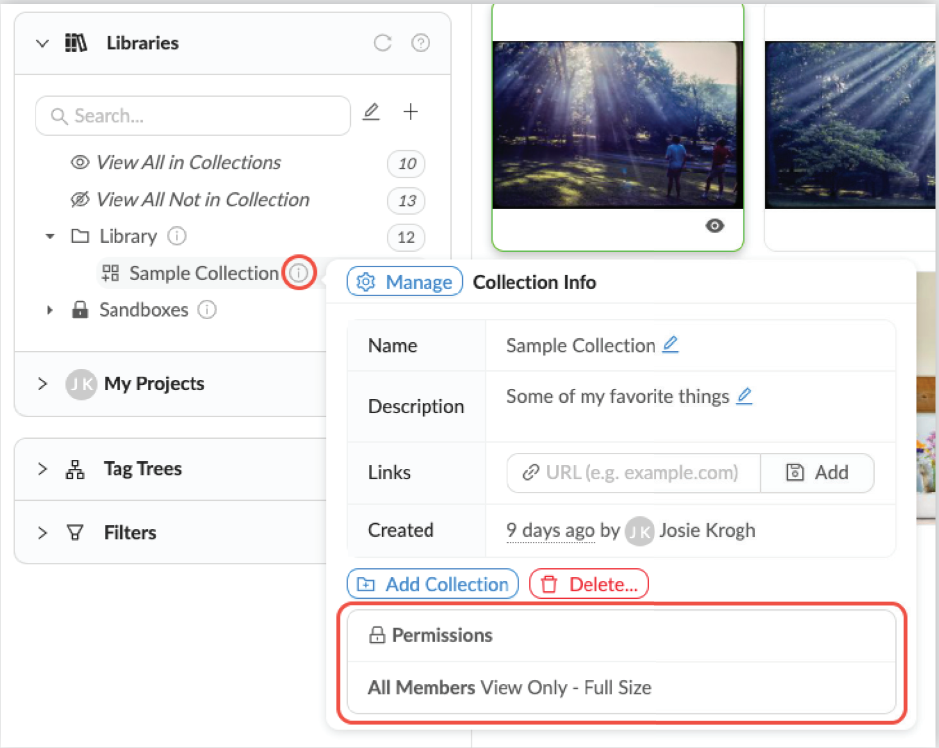
ADD FILES TO A LIBRARY COLLECTION

Now let's add some files to the all-members Library to make them accessible to general members.

About The Libraries
Libraries are used to make files available to regular members. Your MediaGraph account comes with a sample Library and Collection that have all-member permissions, meaning all account members can view assets in this Library.

Checking permissions in the Library

Mouse over the ⓘ info pop-over to see what permissions are applied to a Library or Collection.

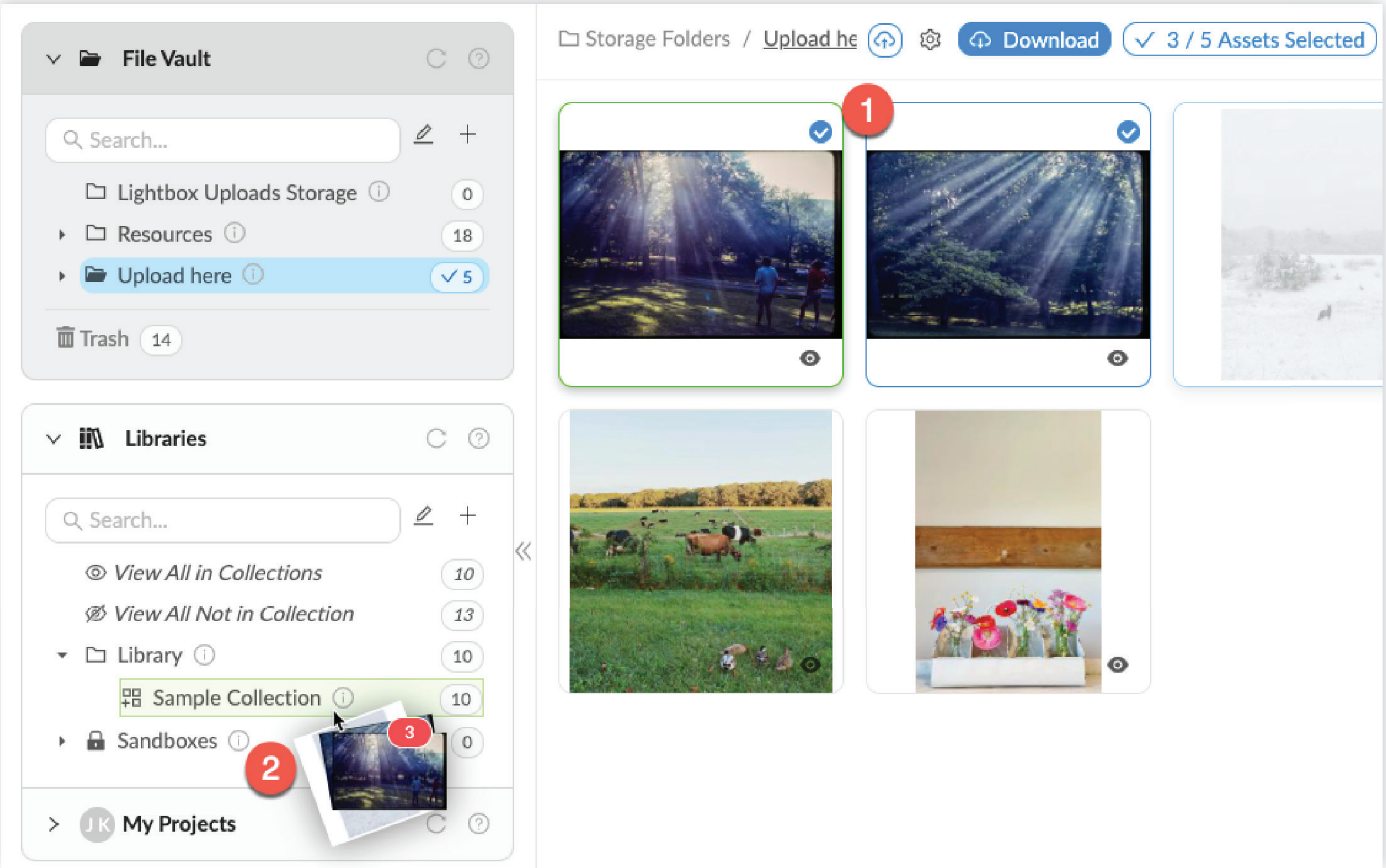


All members have permission to view full size files in this collection. You can add or change these permissions.

NOTE: Just like the Folder Organizers, Library Organizers do not contain assets. Collections contain assets.

Here are the steps:

1. **Select *some* of the files in the "Upload here" folder.**
   (Don't add all the files you uploaded, so we can see how permissions work.)
2. **Drag and drop selected files into the "Sample Collection".**
3. This will not remove the files from the storage folder or make a second copy. MediaGraph creates a "pointer" to the original files in the File Vault.



When dragging selected files to a Collection, you will see a count of the number of files selected, and the destination collection will be highlighted.

VIEW THE ACCOUNT AS A GENERAL MEMBER

As an account manager (owner, admin or global content manager), you have permission to view all files in the MediaGraph account, general users have much more restricted access to assets and functionality. For this exercise you will switch to the account of a test general member to see how they experience your MediaGraph account.

MediaGraph lets you preview member access by using the “Switch To” command. When you “switch to” another member’s account, you have control over their REAL account. For this exercise you will switch to a test user, a “fake” account MediaGraph automatically creates, to preview what a general member has access to in your account.

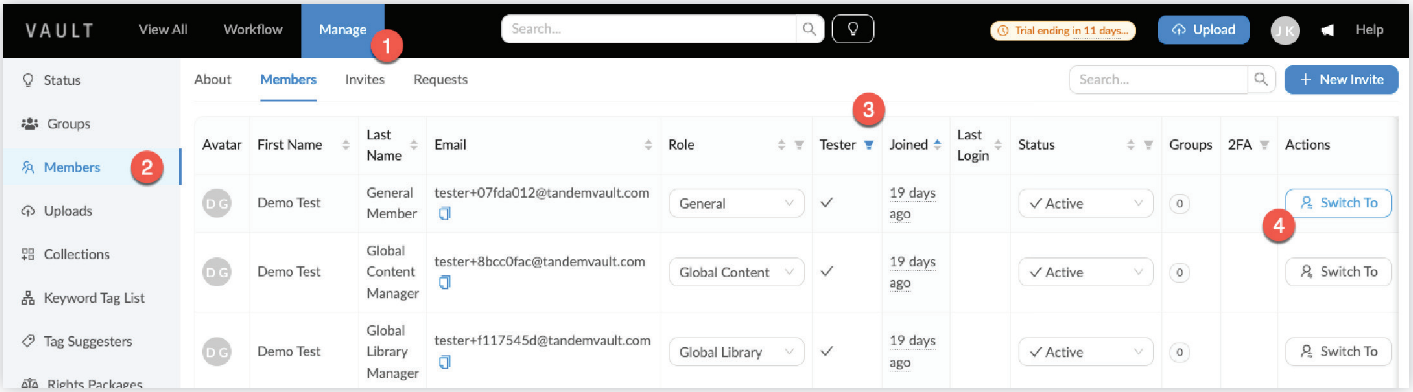
“Test” Members

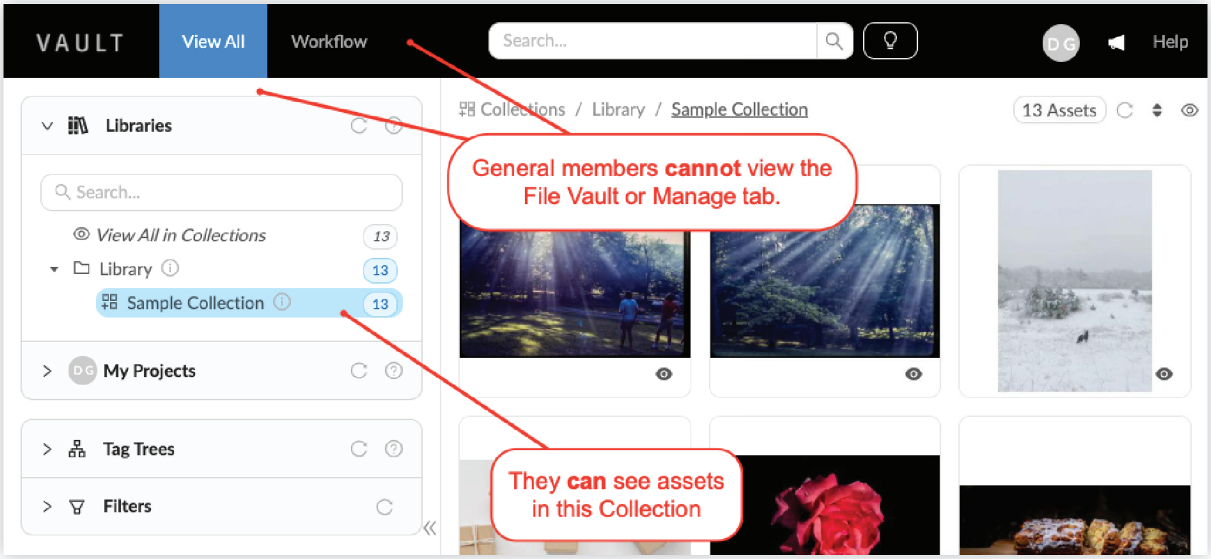
Your account comes with a test user for each member role:

- Global Content Manager
- Global Library Manager
- Global Tagger
- General Member

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 General Test Member and click the “Switch To” button at the far right.**
5. You are now viewing the account as a general member would. Notice, they have no access to the Manage tab, or the File Vault. They can see the All-Members Library, and the assets you added to the Sample Collection.



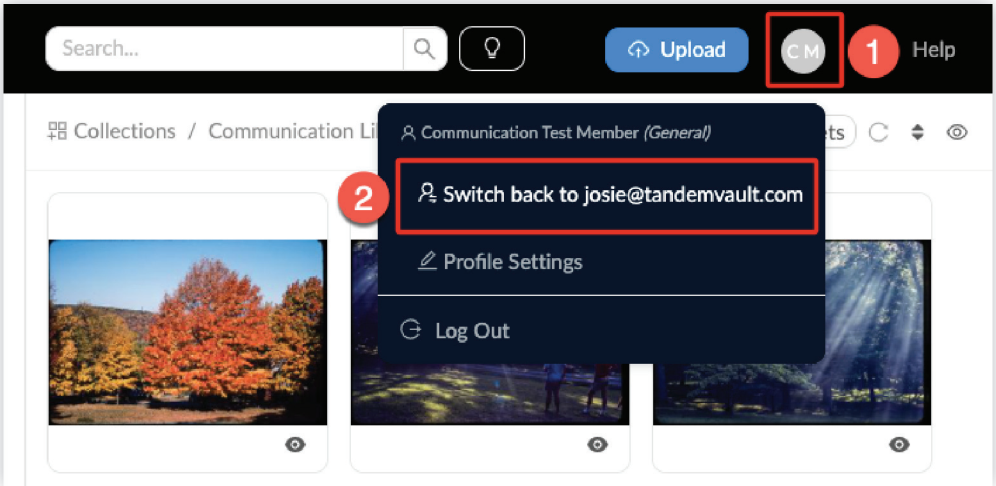


General group member's view of TV3.

Switch back to your main account

Once you're done viewing the account as a general member, follow these steps to switch back to your main account.

1. **Mouse over the user profile menu** in the top right corner.
2. **Click "Switch back to yourname@email.com".**
3. You are now back in your main account!



2 Upload and Share an Existing Folder Tree

In this exercise, you will learn how to upload and share existing folder trees with general members. This is very useful if your files are already organized into a good folder structure.

Let’s take a look at how we can preserve that folder organization and share it with members.

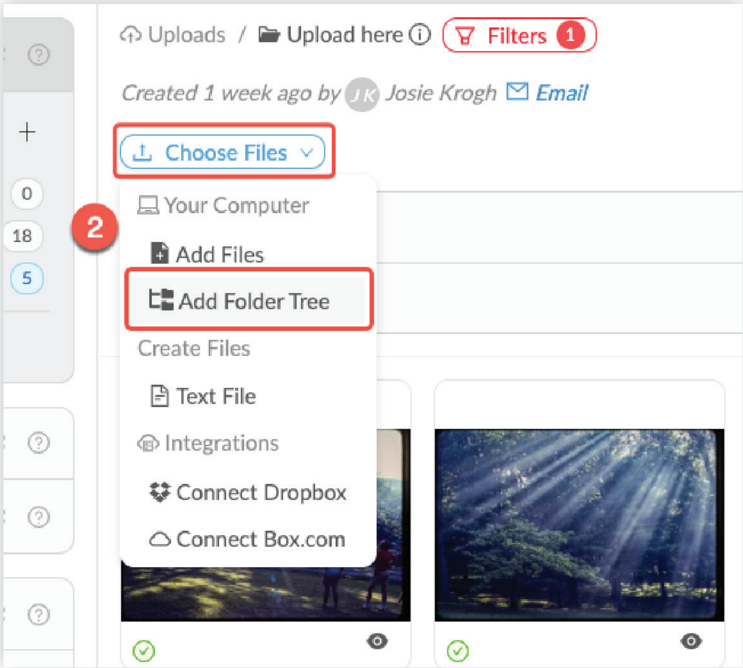
OBJECTIVES

- Upload a folder tree to the FIle Vault.
- Duplicate a folder tree to Collections.
- Share a Collection with general members.
- Edit a Collection’s permissions to remove a watermark.
- Edit a Collection’s permissions to enable members to download assets.

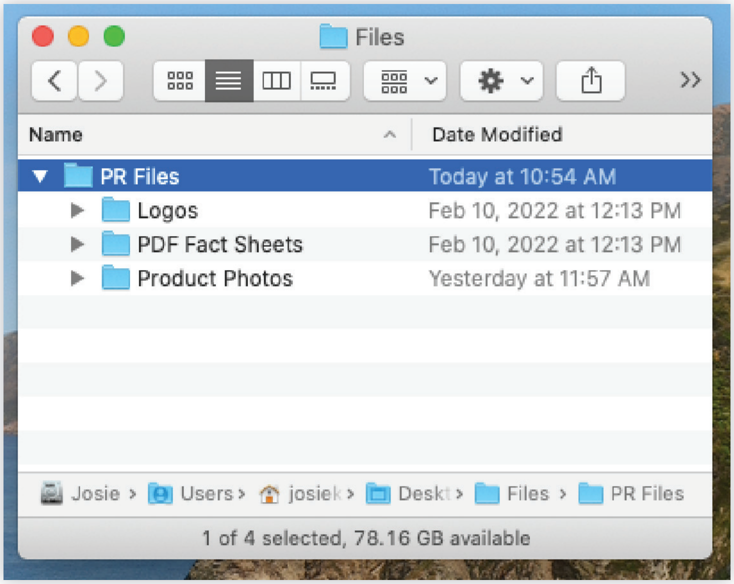
UPLOAD A FOLDER TREE

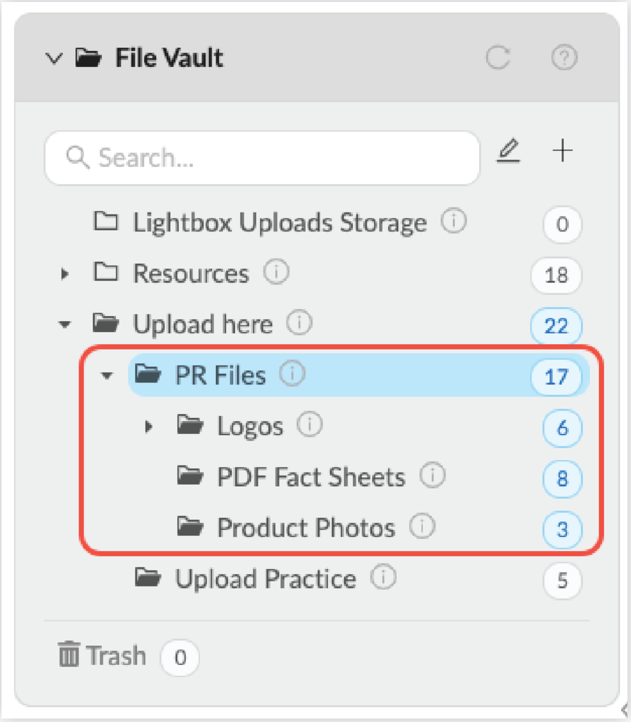
For this exercise you will upload an existing folder tree.
You should make a small folder tree like the one shown below. Make it a few levels deep, and add a few files to each folder. As with the first upload, this is just an exercise to show how MediaGraph works. Here are the steps:

1. **Select the Folder “Upload here” and click the Upload icon.**
2. Click the dropdown **“Choose Files”** and select the option **“Add Folder Tree”.**
3. **Navigate to the folder on your computer you want to upload and click “Upload”.**
4. Files will automatically start to upload.
   Important: Do not navigate away from this page until all files have finished uploading.
5. Once files have finished uploading, refresh the File Vault to see your new folder tree.
   Notice that the folder structure is completely intact.



Select Add Folder Tree from the Choose Files dropdown.





Here is our sample folder tree on the computer and the same folder tree after upload to MediaGraph. The file and folder structure will be exactly the same.

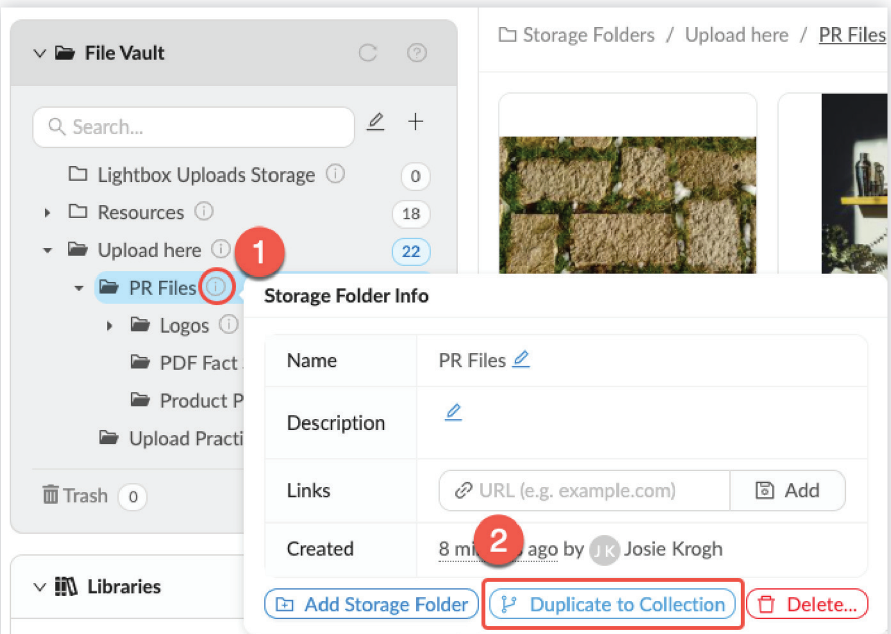
SHARE THE FOLDER TREE WITH ALL MEMBERS

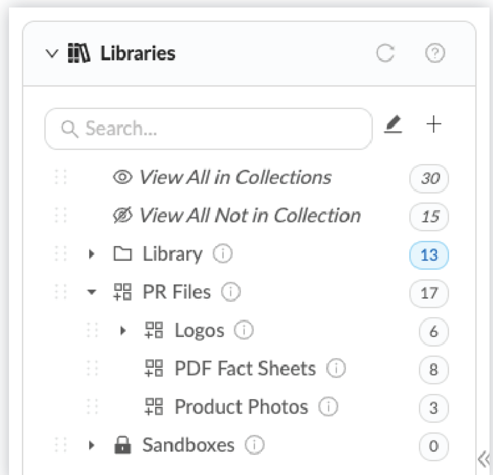
Remember, only Administrators and Content Managers can see the File Vault. Members access files through the Library Collections. In this step, we will duplicate the new folder tree into a Collection tree, and then add it to the All Member Library.

Duplicate the Folder Tree to Collections

Follow these steps to duplicate your folder tree to Collections with one simple click.

1. **Mouse over the ⓘ info pop-over** next to the top-level folder of the folder tree you just uploaded.
2. **Click "Duplicate to Collection". Click "OK".** This will create a new Collection tree based on the folder tree, and add all the files to the appropriate Collections.
3. Now look at the Libraries Panel to see your new Collection tree. You'll notice the original folder structure has been preserved.



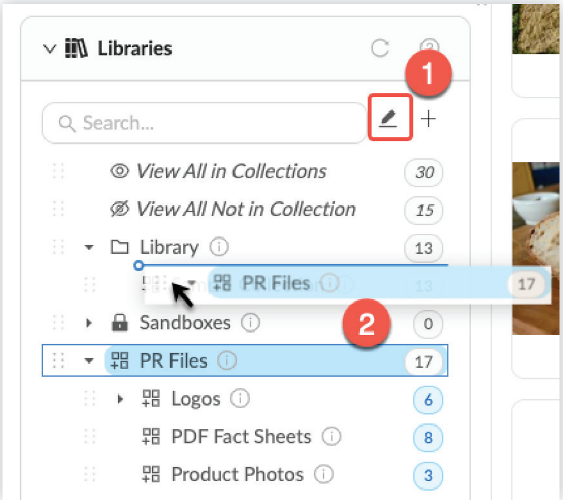


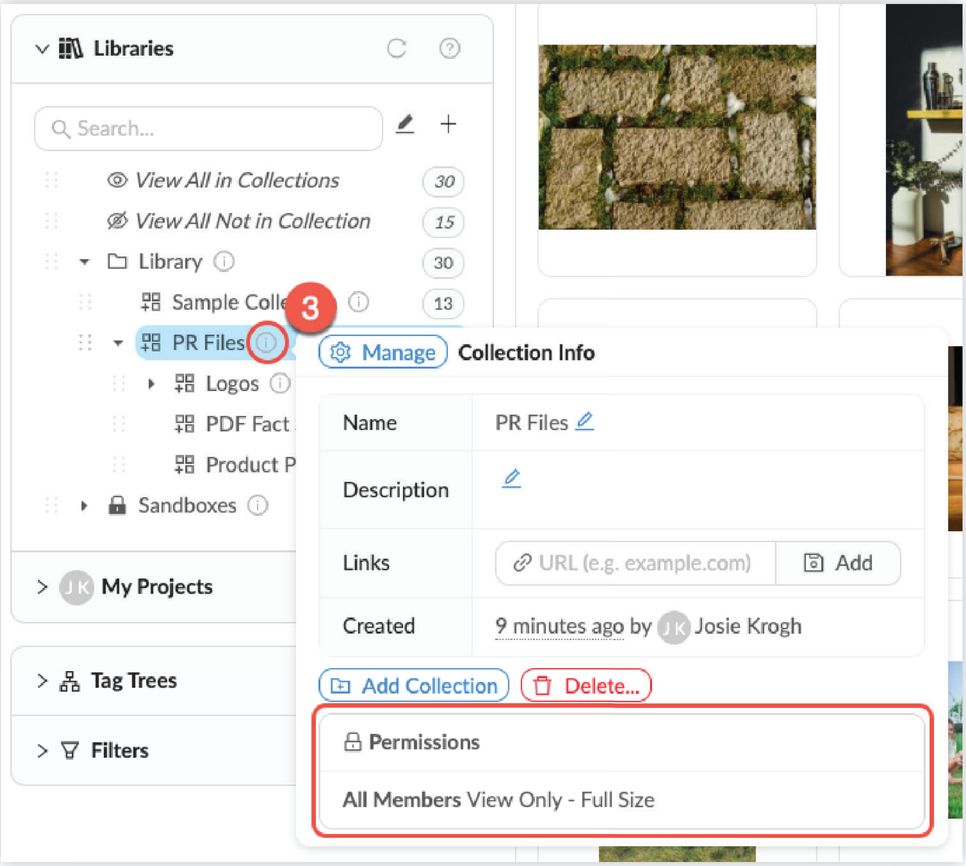
Move the Collection Tree to the all-member Library

When you duplicate a folder to a Collection it automatically comes in as a top level Collection with no permissions. In order to make it visible to regular members, you can add specific permissions, or drag it into an existing Library. In this case, we will add it to the general Library, and it will become visible to all members.

Follow these steps to make your Collection tree visible to all account members:

1. In the Libraries panel, **Click the pencil to enter Rearrange Mode.**
2. **Drag the Collection tree into the all-members Library.** A blue line will appear to show you where you are dragging the Collection to.
3. Success! Now mouse over the info pop-over to take a look at your Collection's permissions (you may need to refresh the Library panel to see the changes you made).
   You'll see it inherited "All Members View Only - Full Size".





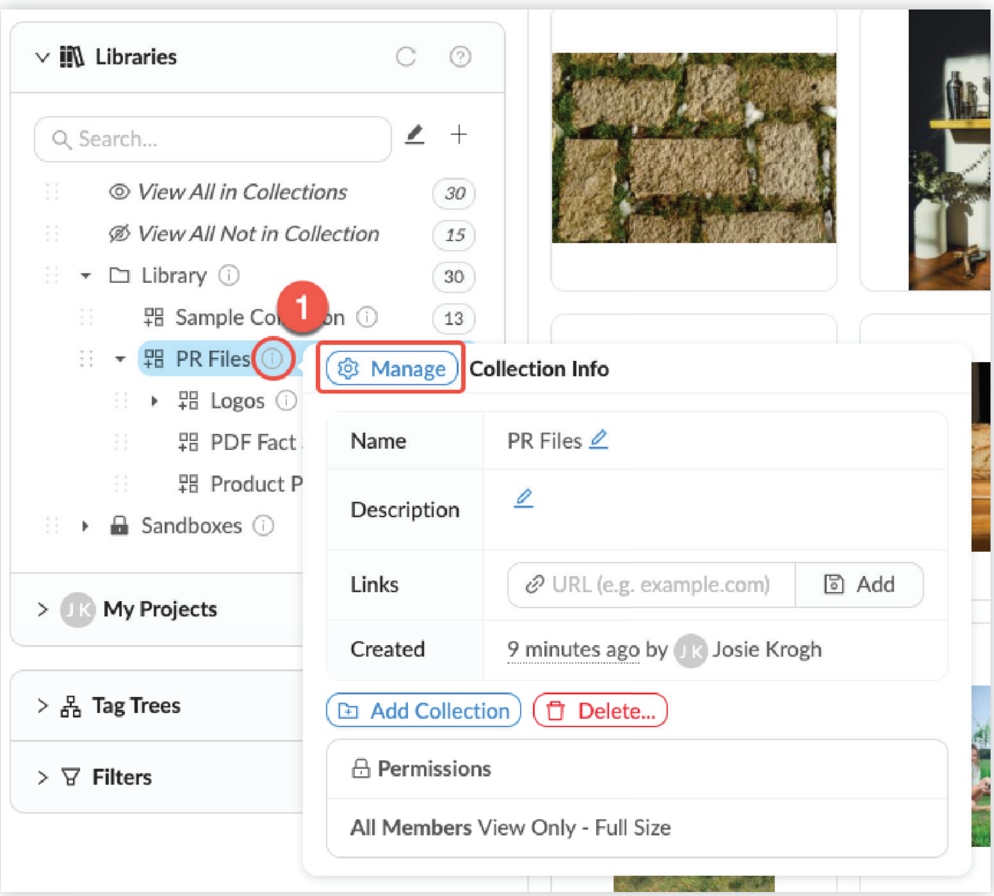
ALLOW MEMBERS TO DOWNLOAD ASSETS

Now that we've seen how to make files visible to members through the Library, let's see how we can give the members download access. We do this by assigning a different permission to the Library. In this case, we will give them permission to download the original files.

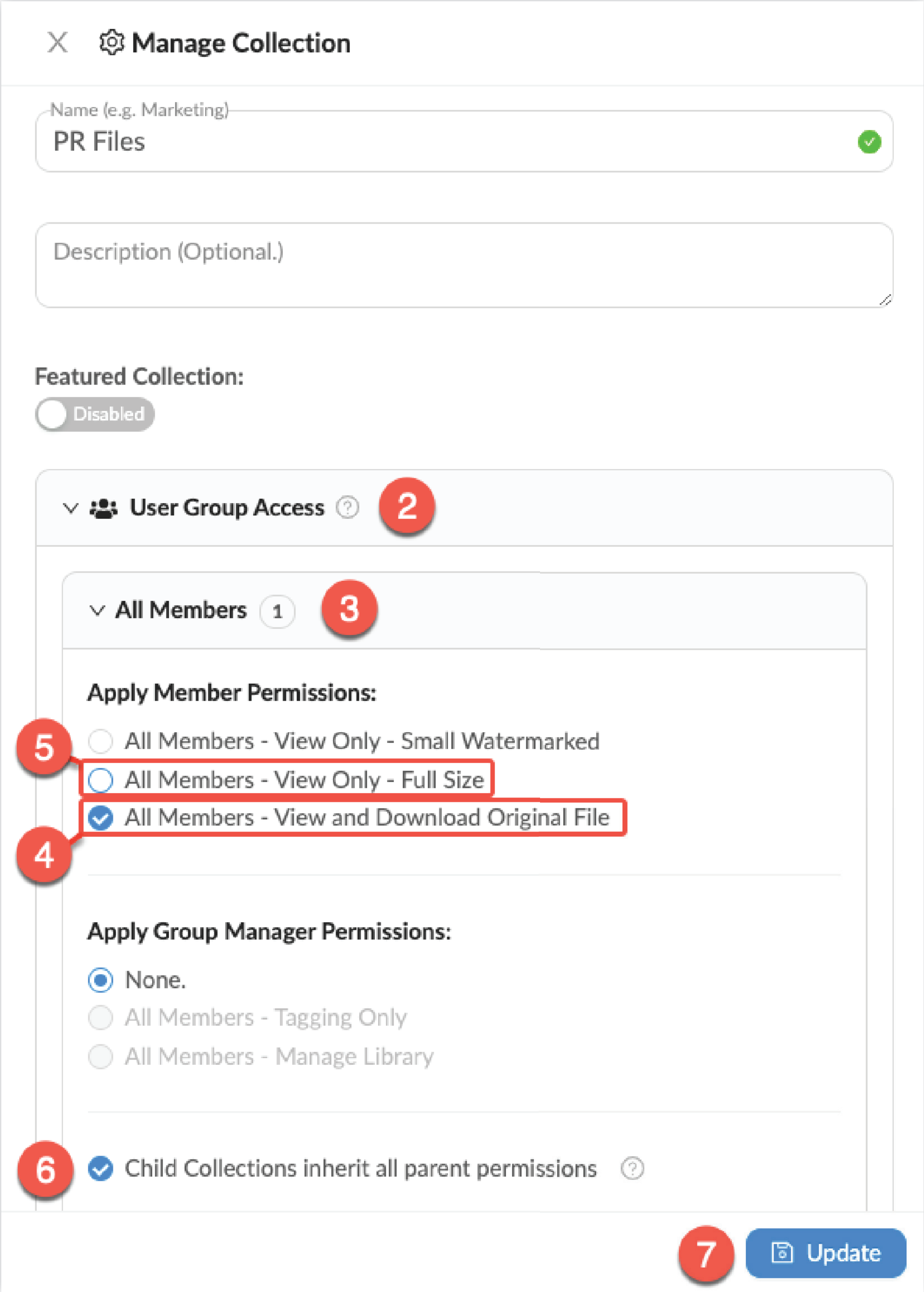
TIP: Once you've seen how to change the permission, you can always change it back if you prefer to block downloads by general members.

Here are the steps:

1. Mouse over the info pop-over next to your new collection tree. **Click the** Manage **button.**
2. Click the accordion labeled **"User Group Access"** (all groups within your organization are listed here).
3. Click the **"All Members"** tab.
4. **Click the checkbox next to "All Members - View and Download Original File".**
5. **Unclick "All Members - View Only Full Size"** (In nearly all cases, there is no need to select more than one permission per group.)
6. Confirm that "Child Collections inherit all parent permissions" is checked.
7. **Click "Update"** to save changes.
8. You can switch to the user view to confirm the access.



The info overlay for a Collection tells you what permissions have been assigned to the Collection.

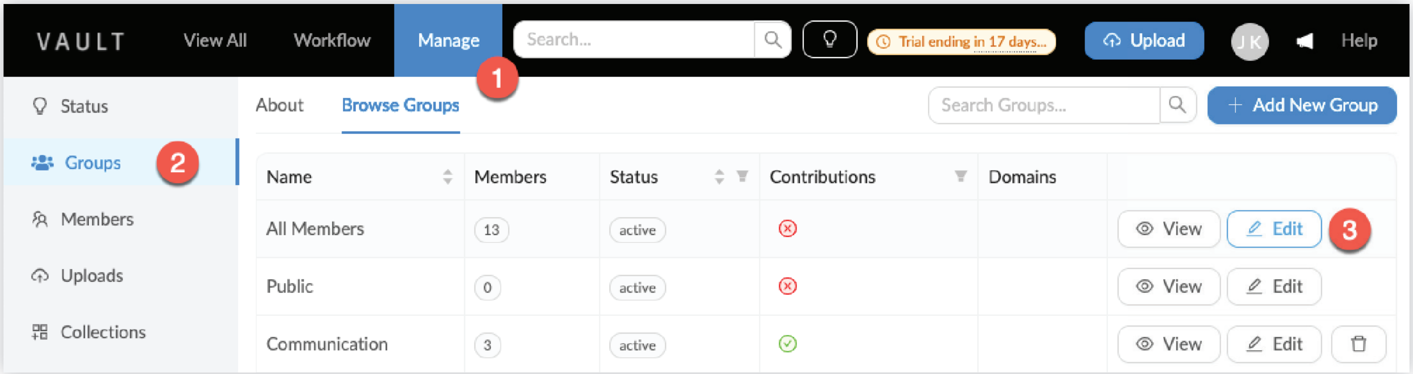


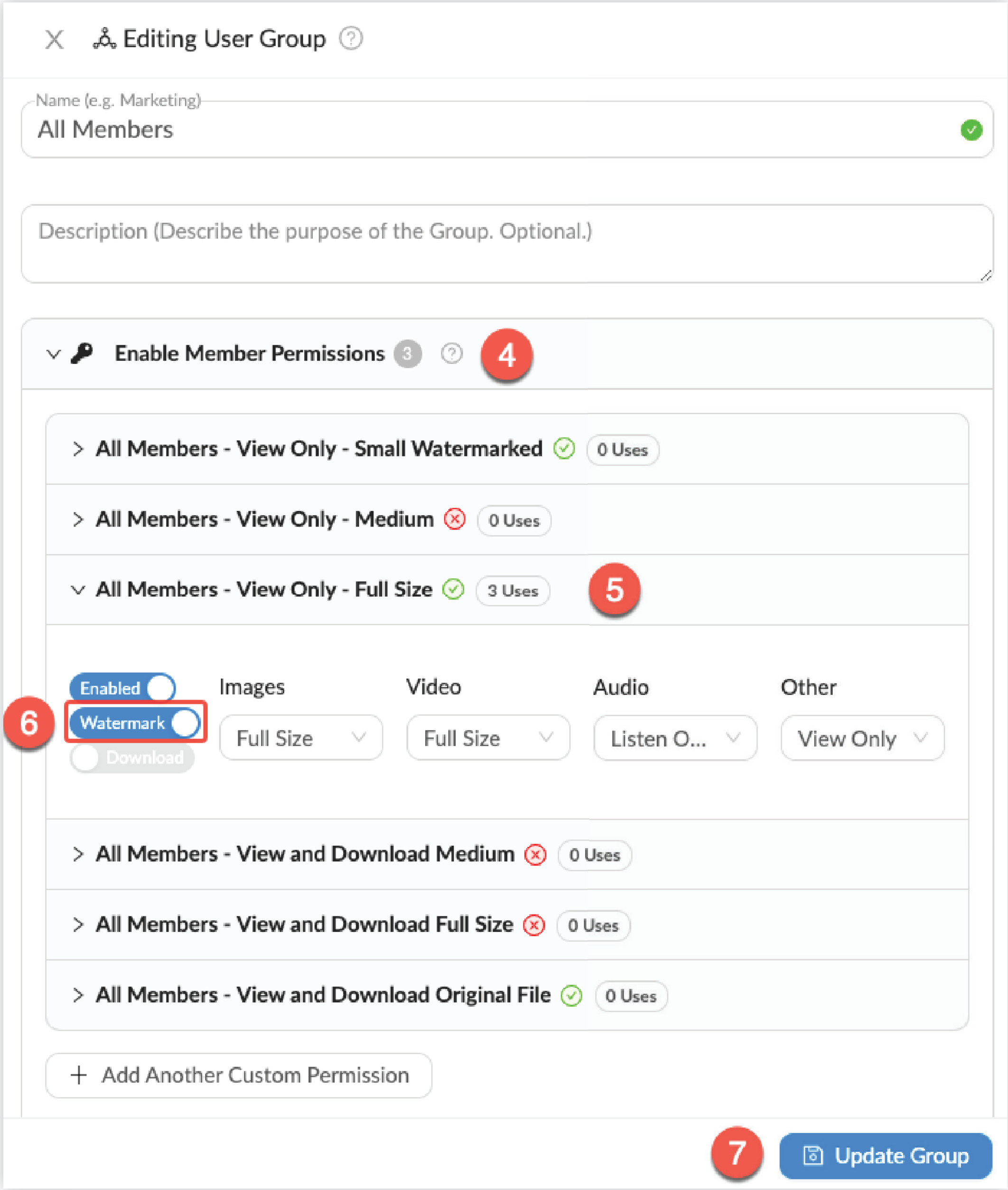
The Collection's manage panel allows you to modify which permissions are assigned to a Collection.

REMOVE WATERMARK

Now that we see how to add or remove a permission, let's go a little deeper and see how to configure a permission. In this case we will see how to remove the watermark from the "All Members View Only Full Size" permission.

1. Click **"Manage"** to enter the management area of your account.
2. On the left side menu, click **"Groups"**.
3. Locate the **"All Member"** Group. Click **"Edit"**.
4. Click the accordion labeled **"Enable Member Permissions".**
5. Click the accordion of the permissions level "All Members - View Only - Full Size". This is the permissions level that is automatically assigned to the all-member Library.
6. Click the **"Watermark"** toggle to disable it.
7. Click **"Update Group"** to save changes. The watermark is now removed from this permission.





As you see, there are a number of preset permissions you can enable, and you can create custom ones if you like.

Now that you see how to create and assign member permissions, select one that is most appropriate for your general Members and move onto the next step.

3 Invite Account Members

Congratulations! Now that you've got your account set-up and created an all-member Library, it's time to add your members.

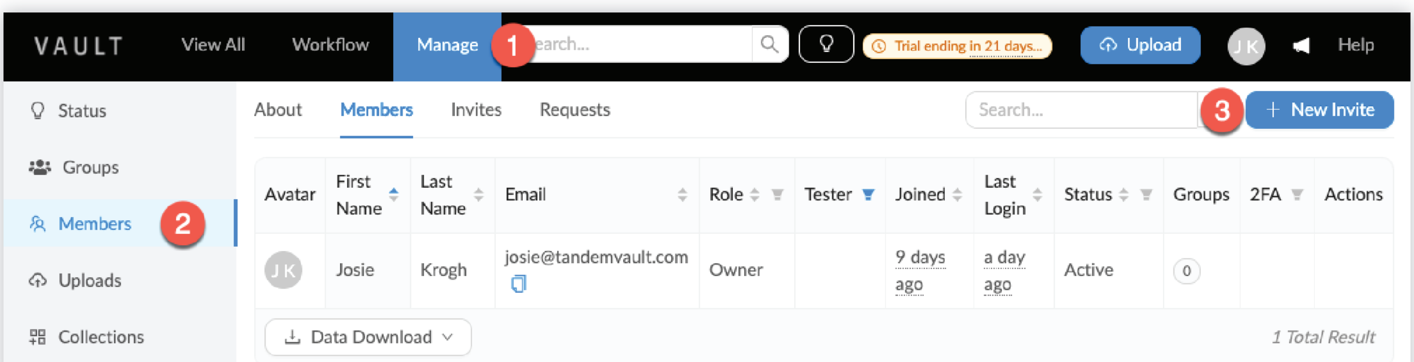
OBJECTIVES

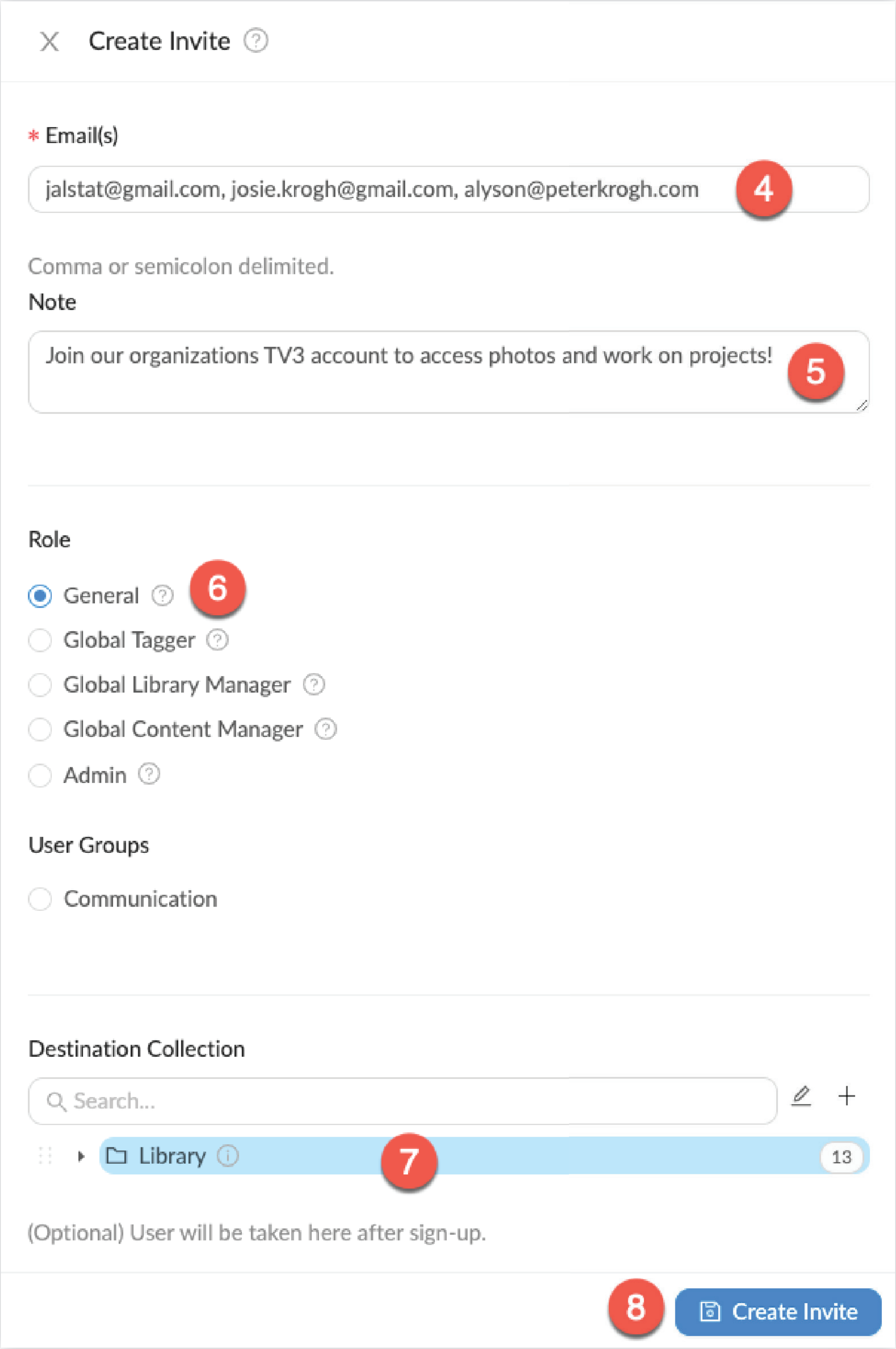
- Invite new Members
- Manage and track invitations

INVITE NEW MEMBERS

In this exercise you will learn how to invite new members to your MediaGraph account, and how to manage and track invites once they have been sent out.

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 **"General"** as their role. [Click here]() to learn more about the different user roles in MediaGraph.
7. Select a destination Collection for them to be taken to after they sign-up (optional).
8. Click **"Create Invite".**
9. Congratulations! You just invited your first MediaGraph account member!

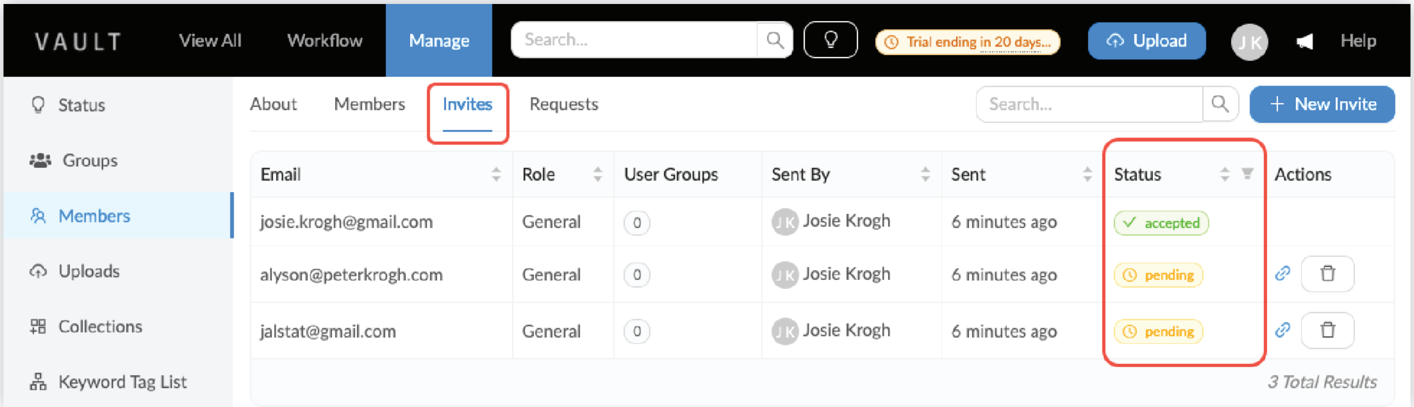




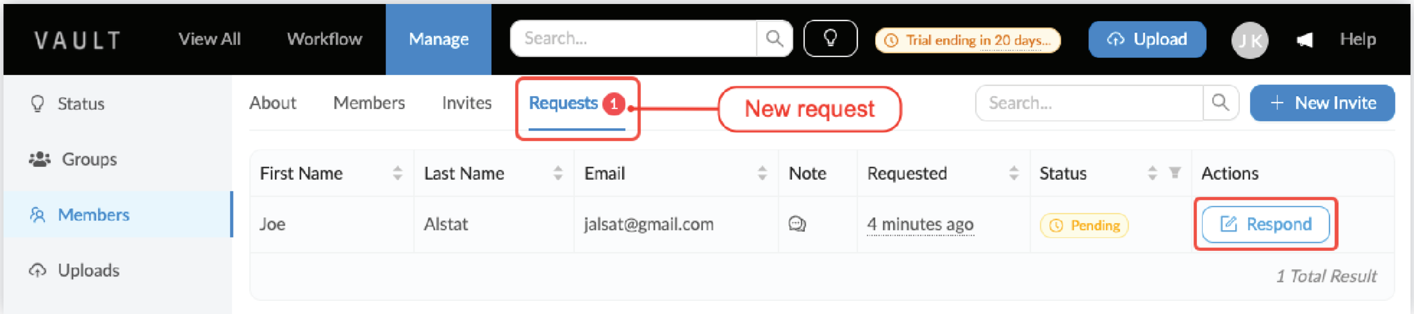
The Member invite dialog.

MANAGE AND KEEP TRACK OF INVITES

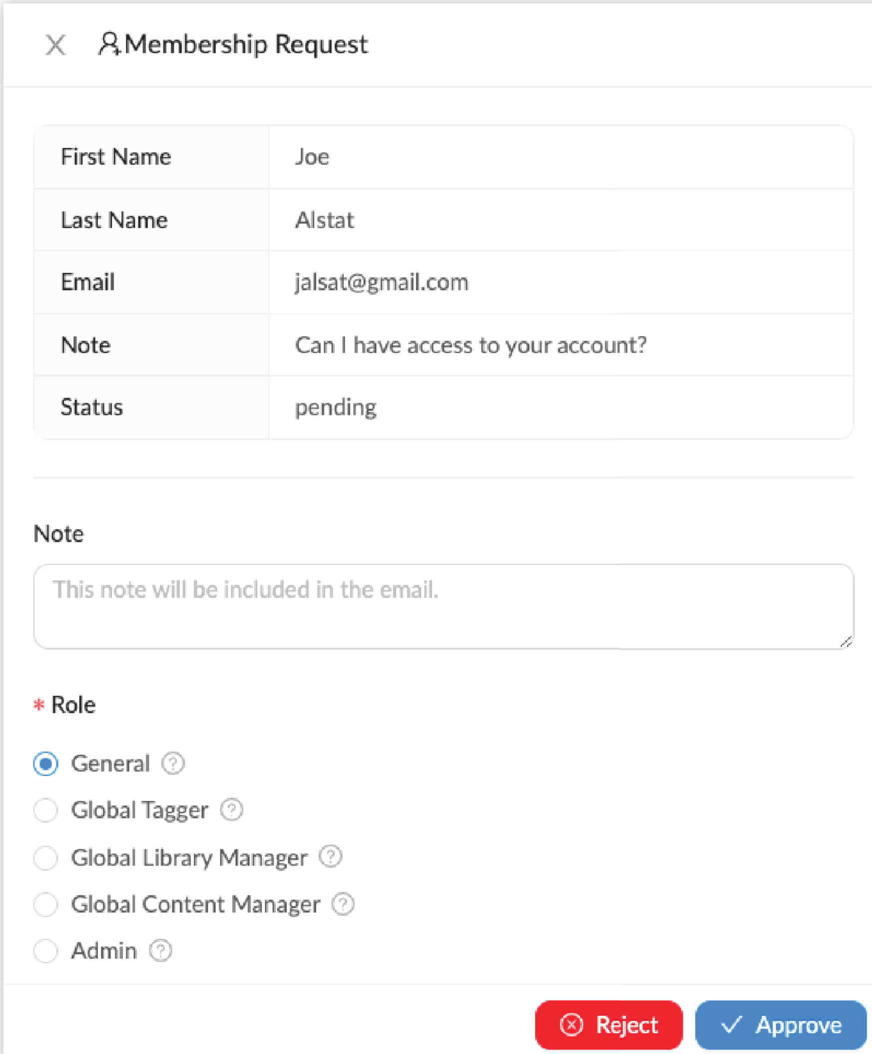
While you're in the member management area of your account, take a look at the other tabs: Invites and Requests. The Invites tab allows you to track the status of invites: accepted or pending. And the Requests tab is where you can approve or reject incoming requests to join your MediaGraph organization.



The **Invites** tab tracks the status of all invites (accepted or pending).



MediaGraph will send you an email when you have a new request to join.
You will also see an alert next to the Requests tab.
Click the **Requests** tab to approve or deny.



Here is the Request approval dialog.

4 Other Uploading Options

We've shown you the most basic ways to upload, but MediaGraph has lots of options for getting your files into the account. Here are two other popular upload options, importing files from a Dropbox or Box account.

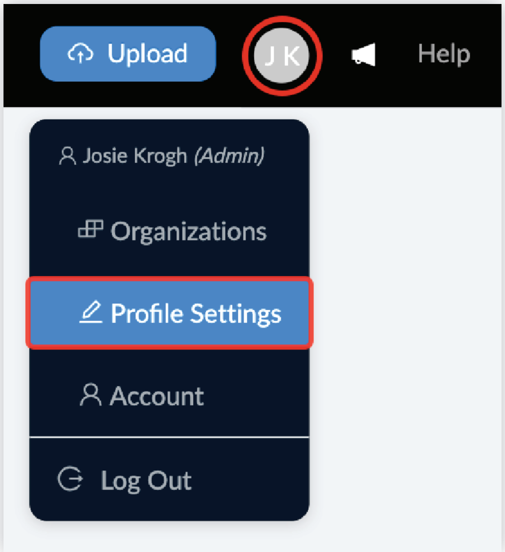
OBJECTIVES

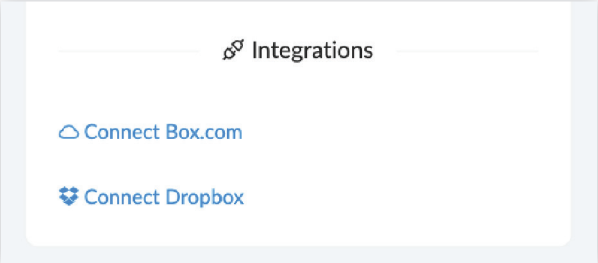
- Connect your MediaGraph account to your Box and/or Dropbox accounts.
- Upload files directly from your Box and/or Dropbox account.

CONNECTING BOX AND DROPBOX TO MEDIAGRAPH

MediaGraph makes it easy to import files directly from your Box or Dropbox account. You may have noticed these options when you "Choose Files" to upload.
Follow these steps to connect your MediaGraph account and your Box and/or Dropbox accounts.

1. **Make sure you are logged in to Dropbox and/or Box in your web browser.**
2. Go to your **profile settings** in the top navigation bar. (This is marked by your initials in a circle).
3. At the bottom of the window, click on **Connect Dropbox** or **Connect Box.com.**
   It should be able to connect automatically, but it may prompt you to authorize the connection. The link will change to a message telling you which account you are connected to.





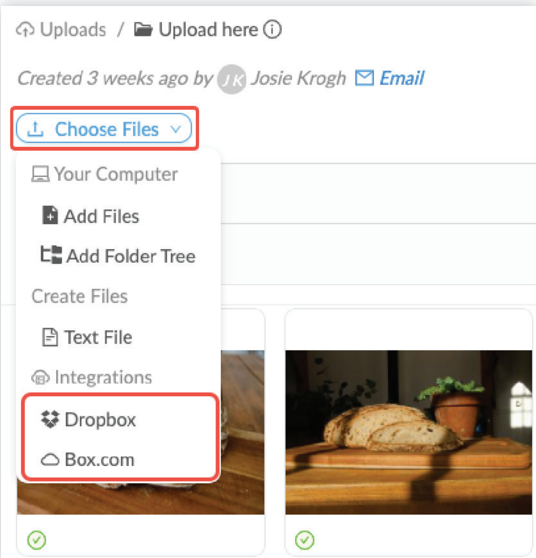
Click on these links to connect your external accounts to MediaGraph.

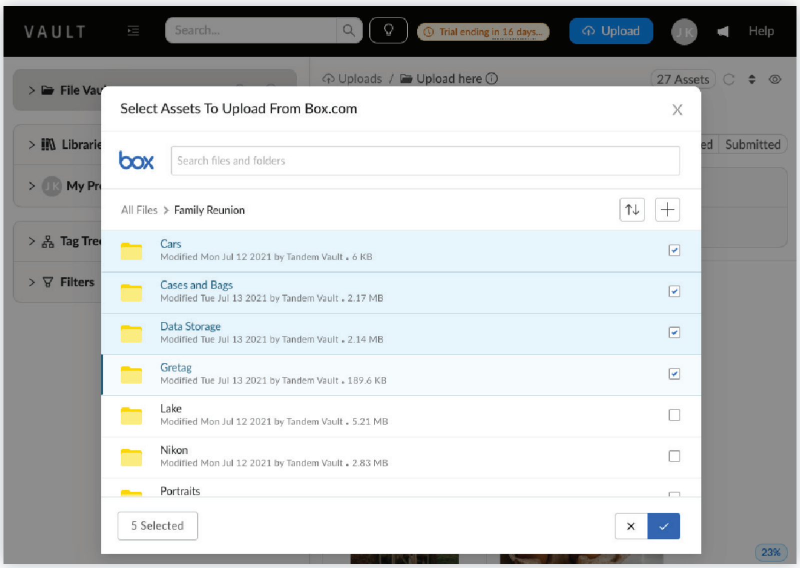
UPLOADING FROM BOX AND DROPBOX

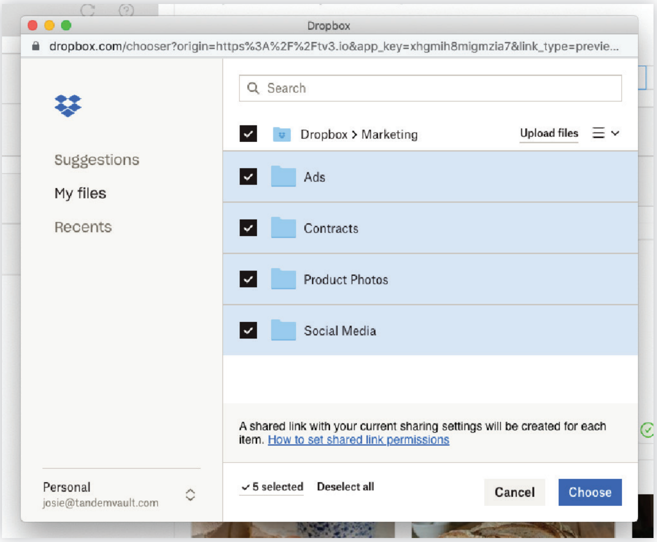
Now that your accounts are connected, you can import files from Box and Dropbox just like you would from your computer. Follow these steps to upload files, folders or folder trees to your MediaGraph account.

1. Click on a folder in the File Vault.
2. Click the **Upload button** 

3. Click the Dropdown **"Choose Files"** and under integrations, select the option **"Dropbox"** or **"Box.com"**.
4. In the pop up window, select the files, folders or folder tree to upload.
5. Click **choose**, and files will begin uploading.







You can upload an entire folder tree from Box.com or Dropbox and MediaGraph will duplicate the folder structure in the File Vault.