mediagraph™

GETTING STARTED 3
Groups

Groups are used to make certain content available to a set of users inside (or outside) of your organizations. The best way to understand how groups work is to make one. In this getting started guide we will show you how to make a practice Group and how to manage and use Group functions.

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1 About Groups

Groups are the primary tools for connecting members with assets. Groups allow you to control who can access files, including view and download. Group permissions are assigned to Collections, and members of the groups can access those collections.

PUBLIC VS. ALL-MEMBER VS. GROUPS

All accounts come populated with two "automatic" groups: **All Members** and **Public**. These are useful for providing general access to material. You have the option to create additional Groups to subdivide access for different teams or departments. The screenshot below shows how Group membership allows you to have special access to certain collections.

Use the **Public Group** to make assets accessible to anyone who finds your MediaGraph account
- Make files (such as press releases) available to anyone without requiring login.
- Make "how to sign-up" documents available to anyone.

Use the **All Member Group** to give everyone in your MediaGraph organization access to certain assets.
- Give access to a central Library through Collection permissions.

Use **Groups** to give a subset of your members expanded access to account assets.
- Give a group of users ongoing access to a set of files that should not be accessed by all account members.
- Grant additional download permissions.
- When you have a set of members that all have a unique email [domain](#).
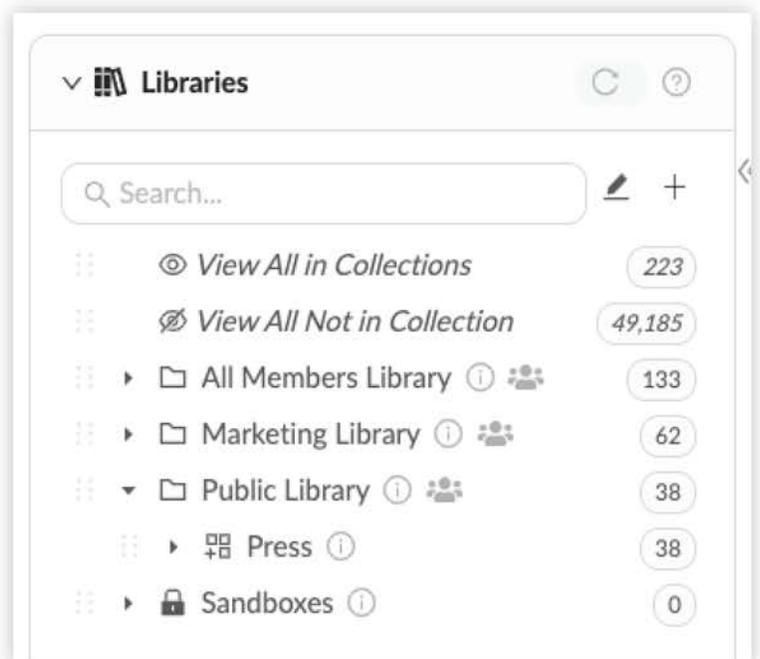
Group Libraries make files available to specific subsets of your members. These are marked with the Group icon as you can see here.

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Make a Practice Group

Groups are created in the Group management area. For this exercise we're going to make a practice Group for demonstration purposes. We will show you how to delete the group later, so don't stress too much on the details. Group functions: Make a new group, add files to the group folder and library & preview the group member access.

MAKE A NEW GROUP

We'll start by making a new group.

Here are the steps:

1. Go to **Manage > Groups** and click **+Add New Group.**

2. Give your group a **name** (we chose Practice) and select the **"Full-feature settings with Uploads"** quick setup option.

3. Click **Save Group.**

4. Congrats! You just made a group.

> **Tip:** We strongly recommend using one of the **Quick Setup** setting configurations to ensure you get the most functionality out of MediaGraph.

X &Add New User Group ?

Name (e.g. Marketing)
Practice   ✓

Description (Describe the purpose of the Group. Optional.)

♀ Quick Setup

Basic settings ?

Full-feature settings *without* Uploads ?

✓ Full-feature settings *with* Uploads ?

🖫 Save Group

Quick Setup Details

When you create a Group with "Full-feature settings with Uploads" MediaGraph automatically:

- Enables Group managers and creates test accounts for each role.
- Creates a Group Library and Group Storage Folder.
- Enables contributions so Group members can upload assets.
- Routes all Group uploads to the Group Sandbox so a Group staff member can review them before adding them to the Group Library.

Review Group elements

Now let's take a look at the elements that were created when you made the group.

1. Open the File Vault and see that a **Group Organizer** and **"Group Uploads" Folder** were created.
2. Open the Libraries panel and see that a **Group Library** and **"Home" Collection** were created.
3. Open the Sandbox Collection and see that a **Sandbox** has been made for the Group.
4. Mouse over the Group Library info icon and see that **Group permissions** have been made and assigned to the collection tree.
5. Open Manage > Members and show test members. You will see that Group **test members** and test staff have also been created.
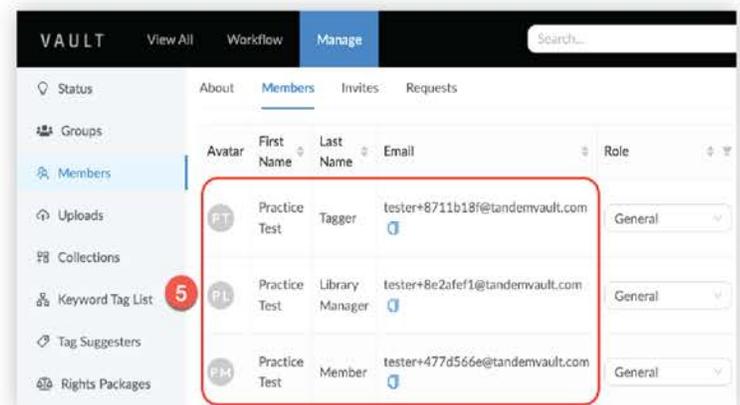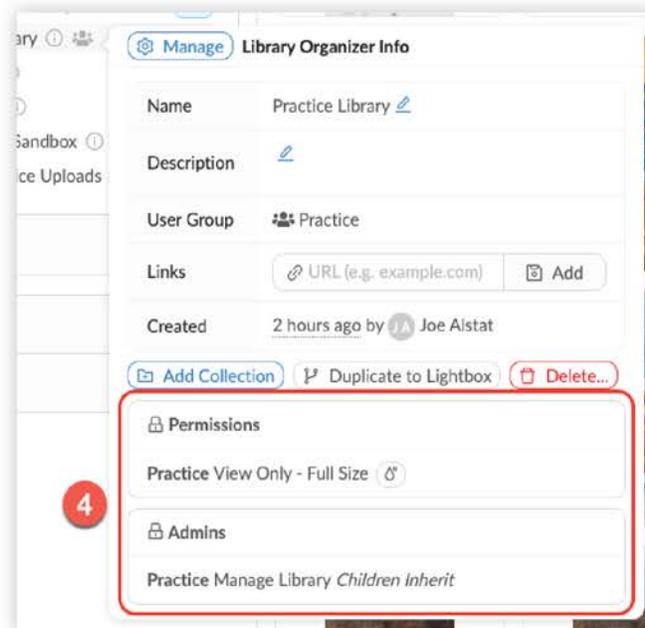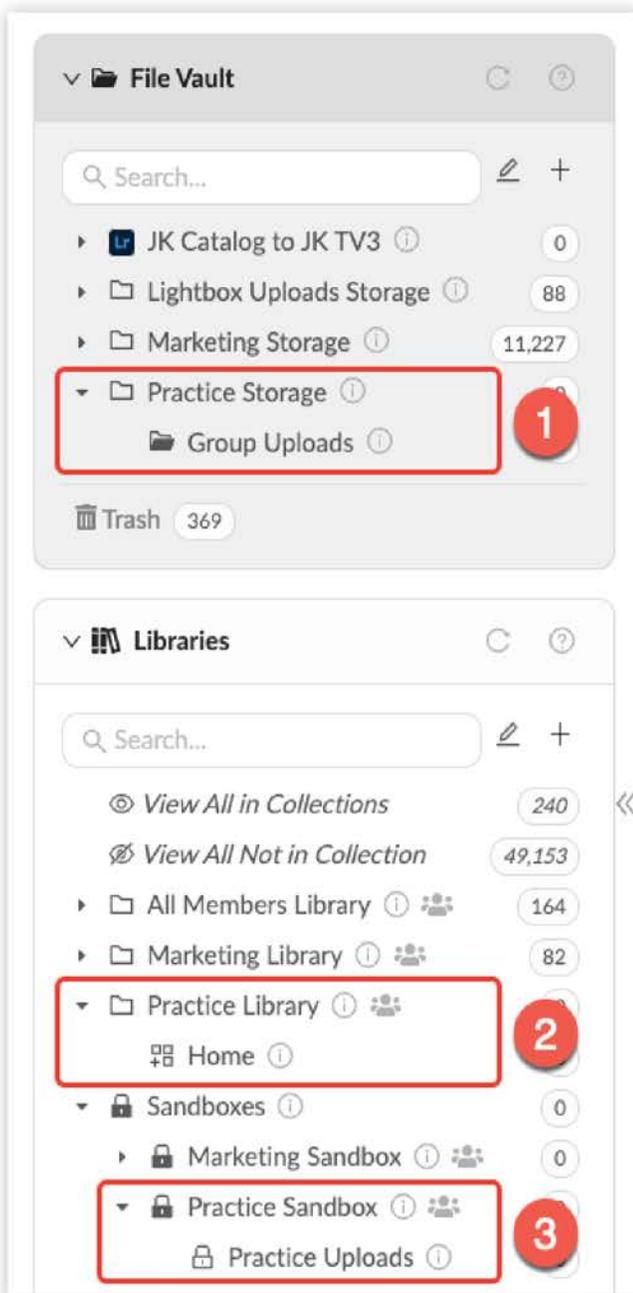
Note how the group name is incorporated to each of the above items. You'll want to take this into account when making your real groups.

ADD SOME FILES TO THE GROUP FOLDER AND LIBRARY

For this exercise you will add a few files to the Group Folder and Library to illustrate what different Group roles can view. Don't worry about what files you add, this is just for demonstration purposes.

Add files to the Group Folder

Follow these directions to upload files directly to the "Group Uploads" Folder:

1. **Select the "Group Uploads" Folder** associated with the Group you just made.
2. **Select files** on your computer and **drag and drop** them into the MediaGraph workspace.
3. Files will automatically begin to upload, do not leave this page until they have finished uploading.

Add files to the Group Library

Now let's add those files to the Group Library.

1. **Select all the assets** you just uploaded to the "Group Uploads" Folder.
2. **Drag and drop assets** into the Practice Group "Home" Collection in the Library.

In the next section, we will view the site as a Group member so that you can preview their user experience.

3 About Group Roles

In addition to the MediaGraph global roles we outlined in our previous Getting Started exercise, MediaGraph also supports Group based roles for members and staff. This allows the group's content and members to be managed by someone who does not have full control over the entire account.

Group roles include:

- **Group Member** - Can access Group Libraries according to permissions.
- **Group Tagger** - Can view and tag all assets in the Group Library and Sandbox.
- **Group Library Manager** - Has control over the Group Library, Sandbox and Membership.
- **Group Content Managers** (Multi-department and Enterprise accounts only) - Can access the Group storage folder in the File Vault.

SWITCH TO GROUP TEST MEMBERS

The easiest way to understand the Group capabilities is to switch into the tester view.

1. Go to **Manage > Members.**
2. You will see a list of all account members. To display test accounts, **click the filter ▼ next to Tester. Select "Tester" from the dropdown. Click OK.**
3. Start by switching to a general Group member. **Locate the "Group Test Member" and click the** ⟨ Switch To ⟩ **button at the far right.** (You may need to scroll to the right).
4. You are now viewing the account as a general Group member would (pictured right). Notice, they can only see the Group and All-Members Library, but not the Sandbox or anything in the File Vault.
5. Once you're done viewing the account as a general member: **mouse over the user profile menu** in the top right corner and click **"Switch back to yourname@email.com".** You are now back in your main account
6. Repeat steps 1-5 to switch to a **"Group Test Tagger"** and **"Group Test Library Manager"** to see how they experience MediaGraph.

Group Taggers can see the Group Library and the Group Sandbox. They can only apply metadata to assets in these Collections. Note they cannot see the File Vault or Manage tab.

Regular **Group members** can view the Group Library and any other assets that have all-Member or Public permissions.
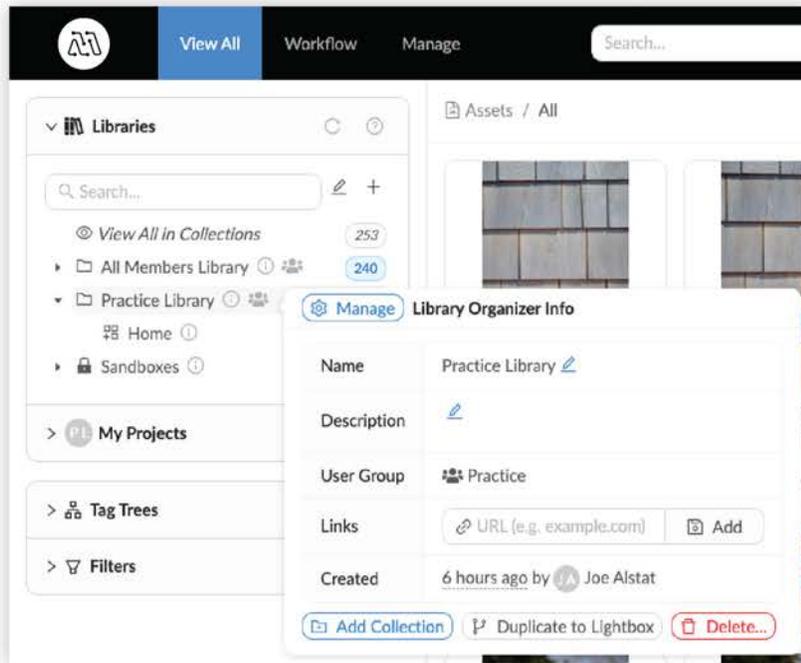
Group Library Managers can edit the Group Library and have access to the Manage tab where they can invite Group members and edit select Group settings.
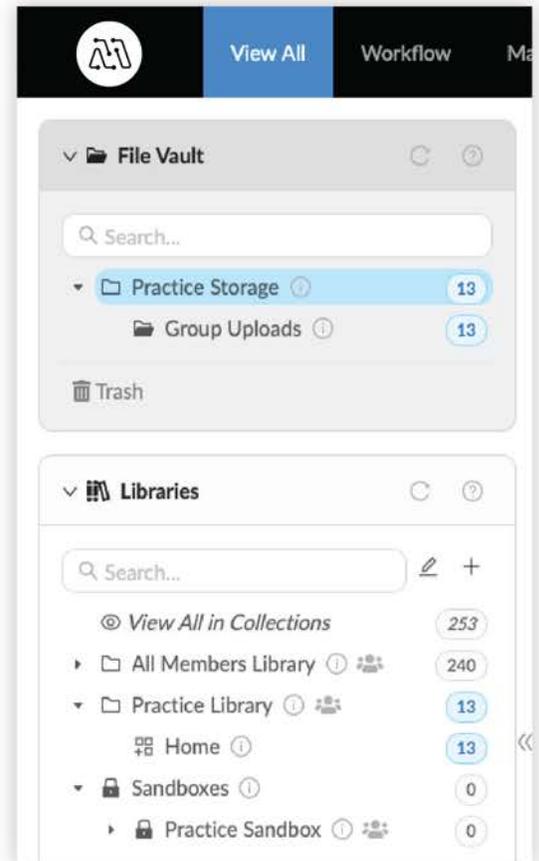
Group Content Managers have the permissions of a Group Library Manager and can access to the Group's storage folder in the File Vault.
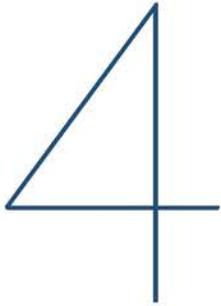
4 Adding Group Members

You can add members to a Group when you first create a Group or later in Group management. Adding a member to a Group will give them access to all Group Libraries and Group contribution requests.

There are several ways to add members to a Group:

- **Select Existing Members:** Choose from existing MediaGraph users.
- **Invite Non-Members:** If you invite non-members to join your Group, they will receive an email asking them to join your MediaGraph organization. They must create an account to join a Group.
- **Add by Domain:** You can add all existing MediaGraph members with a certain email domain to a Group.

ADD MEMBERS TO A GROUP

Follow these steps to add existing MediaGraph members to a Group.

1. Go to **Manage > Groups** and click **Edit** next to your new Group.
2. Click the tab **Edit Members.** Notice there are three ways to add members: Select from Existing, Invite New and Add by Domain.

3. Click the tab **Select from Existing.**
4. Use the filters to narrow down members to choose from.
5. **Select users** you would like to add to your Group.
6. Click the ⟩ blue arrow to add users to the Group.
7. Click **Save Group.**

ADD GROUP MANAGERS

To add Group managers follow the same steps listed above, except instead of selecting the "Edit Members" tab, scroll down to the **"Enable Group Managers"** tab.

From here you can enable, select and assign Group manager roles.
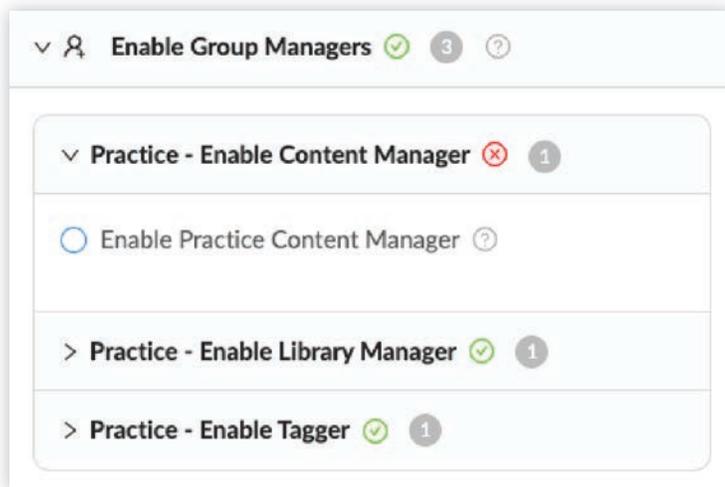
5 Understanding Group Permissions

Groups are the heart of permission control in MediaGraph. They connect members to assets through permissions that are applied to collections. Here we will explain how to create and apply Group permissions.

- Permissions are created in the Manage>Group>Edit Permissions panel.
- These permissions can be applied to collection trees.
- This will give Group members access to the Collection and its contents .
- You can control the specific access of the permissions (e.g. watermark, size of image/video, etc).

APPLYING PERMISSIONS

Once permissions have been created in the Group management panel, you can assign them in a Collection's management panel. Start with a **top-level Collection or Organizer** and assign permissions for a Group. This will allow the Group members to see or download the assets in the Collection.
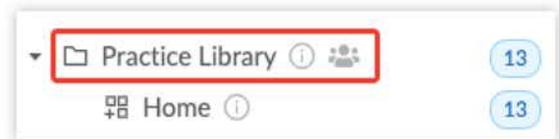
We recommend applying permissions on the top-level container.

Note: Enabling a Group permission level does not apply it to any Collections, you must go into the Collection management panel to apply enabled Group permissions.
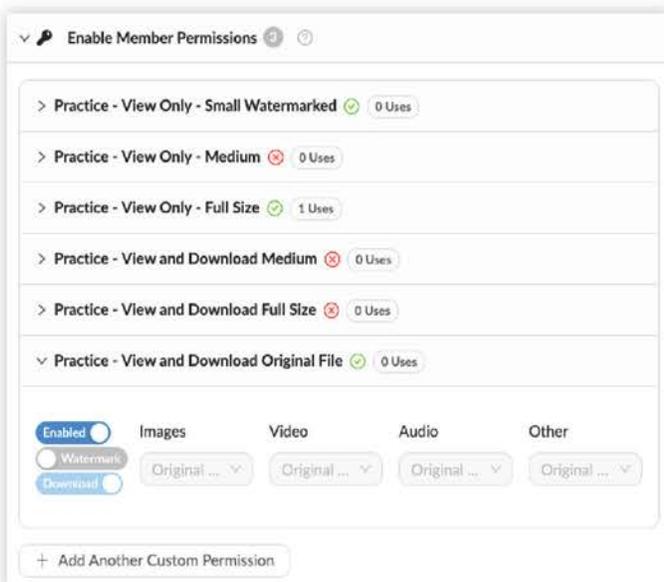
Enable Group permissions
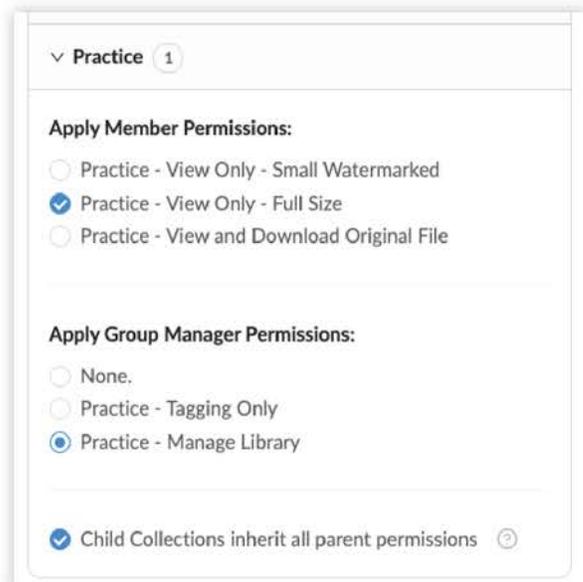
Apply permissions to Collections

Managing Group Uploads

You can also allow upload privileges according to Group membership. This creates an "upload pipeline" for members of the group. All Group uploads are automatically sent to the "Group Uploads" Folder and the Group Sandbox where they can be reviewed by a staff member.

Because this practice Group was created with the Quick Setup option "Full-feature settings with Uploads" you do not need to change any other settings. However, you have the option to make your Group upload request more robust:

- Add a request **description** to let members know what you want them to contribute.
- **Automatically tag** all uploaded files with preset keywords.
- Enable **tag suggesters** to request or require particular tags (this helps keep tagging consistent).
- Request or require specific **rights packages** to be attached to the files upon upload.

HOW TO EDIT A GROUP CONTRIBUTION REQUEST

1. Go to **Manage > Groups** and click **Edit** next to your new Group.
2. Click the tab **Add Contributors.** Make sure the box "Enable Contributions for all Group Members" is checked.
3. This is where you can edit your Group contribution request. Open each tab and explore what sorts of information and metadata you can add.
4. Close the manage panel and hit the Update Group button when you're done.

NOTE: Group members can access Group contribution requests by clicking on the "Upload" button. The Upload button displays all upload paths available to a member.

7 Clean-up

Now that you've learned how to create and manage Groups in MediaGraph, you may want to delete your practice Group and its elements. Deleting Groups, Folders and Libraries CANNOT be reversed, so if you created a Group you would like to keep please skip this final exercise.

DELETE THE PRACTICE GROUP

Deleting a Group will remove all applied permissions and contribution requests. It will NOT delete the Group Storage Folder, Library, any uploaded assets or members (test or real).

Follow these steps to delete your practice Group:

1. Go to **Manage > Groups** and locate the practice Group you made for this exercise.
2. **Click the** 🗑 **trash button. Click OK.**
3. The Group is now permanently deleted.

| Practice | 3 | active | ✓ | | 👁 View | ✎ Edit | 🗑 |

DELETE THE GROUP LIBRARY

Deleting a Library will not delete the assets themselves, only the Collection structure used to present them to Group members. If you would like to delete your practice Group Library, follow these steps:

1. In the Library Panel, mouse over the info pop-over next to the "Practice Library" Organizer.
2. **Click "Delete"** in the bottom right corner of the pop-up. **Click "OK".**
3. The Group Library and "Home" Collection will be automatically deleted.

DELETE THE GROUP STORAGE FOLDER

Important: Deleting a Folder cannot be reversed and all assets will be moved to the Trash (it is possible to restore assets from the Trash).

If you would like to delete your practice Group Folder, follow these steps:

1. In the File Vault, mouse over the ⓘ info pop-over next to the "Practice Storage" Organizer.
2. **Click "Delete"** in the bottom right corner of the pop-up. **Click "OK".**
3. The storage organizer and folder will be automatically deleted. All assets will be moved to the Trash.
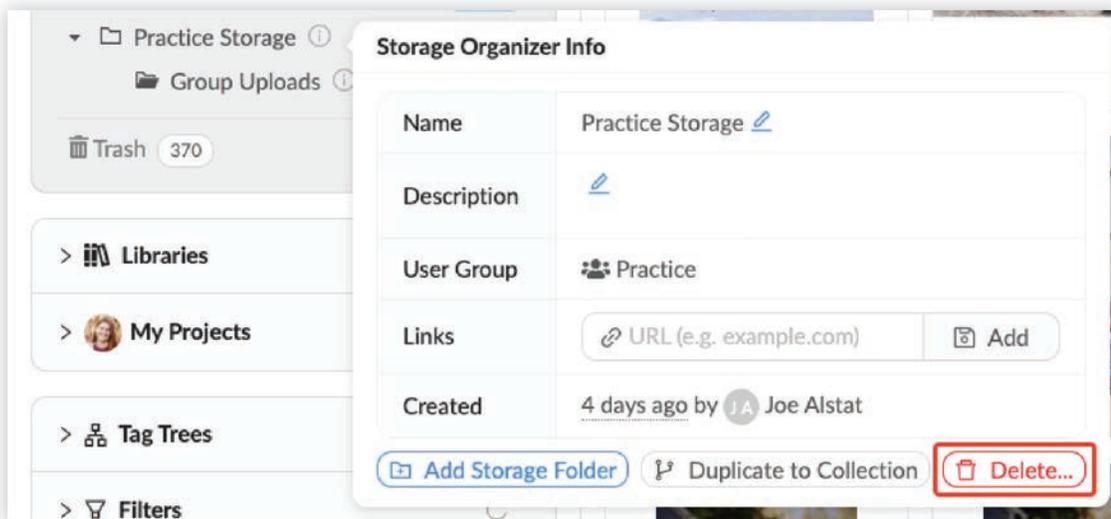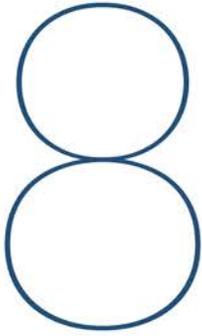
Group Strategies

Groups are most useful for your members who need ongoing access to some subset of the account's content. This could be a department, a permanent working group, outside contractors, or some other set of members. And adding Group staff allows these people to have a slice of your account that they can manage and configure themselves.

Should every department have a group?

It may be tempting to say that any department using the account should have its own group. This would be true if the department has a need for one of the group features: their own content, the need to manage their own users, their own upload needs, or simply the need to organize the material according to the departmental mission.

If none of those specific needs are present, however, it may be better to hold off on creating a departmental group, at least for the present time.

Using My Projects instead of Groups

It's common to have ongoing projects where a set of members need to collaborate. In many cases, it's better to use the My Projects panel instead of Groups. This is particularly true of projects with ad hoc membership, or where the project is "one-and-done."

Many of the features found in Groups are also available in Projects. This includes specific members, controlled permissions, upload capability, and multiple containers.

Group Naming Strategy

MediaGraph automatically names Group-based items (e.g. permissions, test members, Library, Folders, etc). This takes the busy work out of creating a Group, and helps to add clarity to Group-based access and workflow. As you consider the names of any Groups you make, please consider what these automatically created items will look like. While it's possible to rename some of the items, you can't rename all, which will make things confusing.

Listed below are all the items which pick up the Group name automatically. As you can see, this naming convention helps to add clarity in setup. Renaming a Group, and creating mismatched items would cause unnecessary confusion.

ITEM	EXAMPLE
Group Name	Marketing
Test Member Name	Marketing Test Member
Permission Name	Marketing - View Only - Full Size
Group Storage	Marketing Storage
Group Library	Marketing Library
Sandbox	Marketing Sandbox
Contribution Request	Marketing