

# **CLEARCAST**

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## **library**

**Teams**

20/05/2022

# Teams

Teams can be used as an effective way to manage the submissions you make and who can work on those submissions.

It is especially helpful if you create a lot of submissions for different clients. You can name a team after a particular client and assign users to the team who are submitting for that client. You can then select the team on the new submission page and this submission will only be accessible to users assigned under the team.

A team can be expanded by adding a 'collaborating team', which enables multiple selected organisations to both view, edit, create and upload content under the designated shared team.

With the teams function, you can:

- Manage workloads so you only see submissions that are relevant to you
- Share a team with a posthouse and assign them an 'uploader' role so they can just upload files for you
- Share a team with a trafficking/TV admin agency so they can handle the clearance/delivery process for you
- Share a team with a client/advertiser with no roles selected, this will provide them with a 'view only' access so they can monitor their content.

If you experience any issues setting up or sharing teams, please email [help@clearcast.co.uk](mailto:help@clearcast.co.uk) for assistance

# Teams

From the My Organisation' tab, select the 'Teams' option for this view, where you'll be able to view all Teams and their members.

Click on each team to go to their overview and look at their work/content in more detail.

Clearcast Agency Users

Agency

Teams Users Organisation settings

Team name	Members	Collaborating Teams
Default	7 members	0 collaborating teams
Dream Team	2 members	0 collaborating teams
Jo's cc team	0 members	0 collaborating teams
Danny CC team	1 member	0 collaborating teams

Displaying all 4 teams

# Teams Overview

Teams > Parent Team 2

## Parent Team 2

### Parent Team 2 campaigns

[View all](#)

1 campaigns

• No materials 1 (100%)

### Parent Team 2 orders


[View all](#)

1 orders

• Pending 1 (100%)


### Team Members

You will need to go to [Users](#) to manage user permissions

 Mitch The Tester	Creator, Uploader, and OrgAdmin	13 teams	⋮
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### Collaborating Teams

[Add new team](#)

 Child Team 2 (2 Mitch test organisation)	Creator and Uploader	⋮
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Here you can see all campaigns and orders that were created under the team, and their relevant statuses. Clicking 'view all' on either option will take you to the campaigns or orders this team has submitted.

You can add a team from another company or your own here.

Here you can edit the permissions or remove the collaboration.

Here is where you'll see a list of team members and their roles. You can also add new members and remove existing ones here.

# Create Teams

■ CLEARCAST LIBRARY

Search...

mark\_test\_exec2@clearcast.co.uk

Dashboard

Campaigns

Materials

Distribution Orders

Deliveries

### Clearcast Agency Users

Agency

[Teams](#) [Users](#) [Organisation settings](#)

[Create new team +](#)

Go back to your main Teams tab, and then click here to create a new Team.

Team name	Members	Collaborating Teams
Default	7 members	0 collaborating teams
Dream Team	2 members	0 collaborating teams
Jo's cc team	0 members	0 collaborating teams
Danny CC team	1 member	0 collaborating teams

Displaying all 4 teams

# Creating a Team

The screenshot shows the CLEARCAST user interface for creating a team. On the left is a dark sidebar with navigation items: Dashboard, Campaigns, Materials, Distribution Orders, Deliveries, and Teams (highlighted in blue). The main content area has a breadcrumb 'Teams > Create a team' and a heading 'Create a team'. Below the heading is a form with the following fields and options:

- Team name:** A text input field containing 'Team 1'.
- Invite members:** Two radio button options: 'Everyone at 1 Mitch Test Organisation can access this team' (unselected) and 'Add members individually' (selected).
- Only the following members can access this team:** A text input field containing 'x Baljit Sandhu'.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom right.

Four callout boxes provide additional information:

- Top-left callout:** 'The org admin can create a new team by clicking the team's tab and then 'Create a new team' which will also navigate to this page'.
- Top-right callout:** 'Choose your team name here.'
- Right callout:** 'You can choose everyone at your organization to have access to this team, including any new users added in the future. That means anyone can view/create/upload/edit content under that team (depending on individual user roles)'.
- Bottom-left callout:** 'Some settings are restricted. An OrgAdmin user will have complete view of all settings'.
- Bottom-center callout:** 'Alternatively, you can add specific members to the new team created so only they can view/create/upload/edit content under that team (dependent on individual user roles). You would have to add future members individually too.'

# Sharing a Team

The screenshot shows the 'Add Collaborating Team' page in the Clearcast application. The left sidebar contains navigation items: Dashboard, Campaigns, Materials, Distribution Orders, Deliveries, Teams (highlighted), and Registration Requests. The top right of the page shows the user 'mark\_test\_exec2@clearcast.co.uk' and a notification icon. The main content area is titled 'Add Collaborating Team' and includes a breadcrumb 'Teams > post Team > Add Collaborating Team'. The form contains the following elements:

- I would like to invite a team by:** Three radio button options: 'A Team code' (selected), 'Searching existing team', and 'Email address'.
- Invite team with a code:** A text input field.
- Role(s):** A text input field.
- Access Control:** A toggle switch labeled 'Grant access to all previous campaigns, materials and orders belonging to this team', which is currently turned off.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom.

Three callout boxes provide additional information:

- Top Left Callout:** 'Here you can select the method that you would like to invite a team by. The easiest one is via a team code that someone from that team provides you and then enter it below.'
- Top Right Callout:** 'You can also search for an existing team you already know is on Clearcast, or add a user via their direct email address they've used for Clearcast.'
- Bottom Right Callout:** 'Toggling this will allow this team to view all previous content created under the team'

Here you can select the method that you would like to invite a team by. The easiest one is via a team code that someone from that team provides you and then enter it below.

You can also search for an existing team you already know is on Clearcast, or add a user via their direct email address they've used for Clearcast.

Here you can select the role(s) you wish to assign to this collaborating team. The role will determine what that team can do under your existing team, whether they can create content (a creator) or just upload files (a uploader) or both.

Toggling this will allow this team to view all previous content created under the team

# Sharing a Team methods

**Sharing a Code:** The organisation that wants to have access to your team will need to firstly create their own team and then note the team code in the top right of the team's page. They will provide this to your organisation's admin. The code will only be visible to them if their team is not already in collaboration with another team.

**13cc7b51** Copy code

Share this code with an organisation admin to join their team

I would like to invite a team by

- A Team code
- Searching existing team
- Email address

Invite team by email address

**Using an Email Address:** Type in the email of the organisation or team admin for that particular team. They are then sent an email with a link to accept the collaboration.

**Inviting an Existing Team:** The only teams that will appear here are teams under your own organisation *or* teams that already have existing collaborations with you from other organisations.

Invite an existing team

Please select ▲

Please select ▲

- Default team (2 Mitch test organisation)
- Child Team 2 (2 Mitch test organisation)
- ORG B TEAM (2 Mitch test organisation)
- Child Team 1 (2 Mitch test organisation)
- test traffic team (2 Mitch test organisation)



# Sharing a Team's Code

- The org-admin from the other organisation will share the 'team code' with you.
- Go to the specific team you wish to share and click 'add new team' under collaborating teams.
- Click 'share via team code' then enter the code from the other organisation.
- Select the roles you wish for them to have under the shared team.
- Click share and then inform them directly that the team sharing scenario has been created.
- All done and connected! Now you can start collaborating.

If you need assistance in setting this up please contact [help@clearcast.co.uk](mailto:help@clearcast.co.uk)

# Users within a Team

The screenshot shows the 'Clearcast Agency Users' interface. On the left is a dark sidebar with navigation options: Dashboard, Campaigns, Materials, Distribution Orders, and Deliveries. The top header includes a search bar, the user email 'mark\_test\_exec2@clearcast.co.uk', and a notification icon. The main content area is titled 'Clearcast Agency Users' and includes a 'Create new team +' button. Below the title are tabs for 'Teams', 'Users', and 'Organisation settings'. A table lists the teams with columns for 'Team name', 'Members', and 'Collaborating Teams'. A pink callout box points to the 'Jo's cc team' row.

Team name	Members	Collaborating Teams
Default	7 members	0 collaborating teams
Dream Team	2 members	0 collaborating teams
Jo's cc team	0 members	0 collaborating teams
Danny CC team	1 member	0 collaborating teams

Displaying all 4 teams

Selecting a team will show you the users in that team who can see uploaded content

# Users in Teams

CLEARCAST LIBRARY

- Dashboard
- Campaigns
- Materials
- Distribution Orders
- Deliveries

Search...

mark\_test\_exec2@clearcast.co.uk


Teams > Default

In this selection you will be able to view all Members and their roles.

**c3fbn8r6** Copy code

Share this code with an organisation admin to join their team

Default campaigns View all



**7**  
campaigns

- QC failed 3 (42.9%)
- Awaiting upload 1 (14.3%)
- Performing QC 3 (42.9%)

**Team Members**  
You will have to go to Users to manage team permissions

	Justyna Shala	Creator and Uploader	1 team	⋮
	Elliot Lord	Creator and Uploader	1 team	⋮
	Barry Noone	Creator and Uploader	1 team	⋮
	Jan Cooper	Creator and Uploader	1 team	⋮
	Danny Turner	Creator, Uploader, and OrgAdmin	3 teams	⋮
	Baljit Sandhu	Creator, Uploader, and OrgAdmin	1 team	⋮
	Mark Exec	Creator, Uploader, and OrgAdmin	2 teams	⋮

**Collaborating Teams**  
[Add new team](#)

This team has no collaborating teams yet

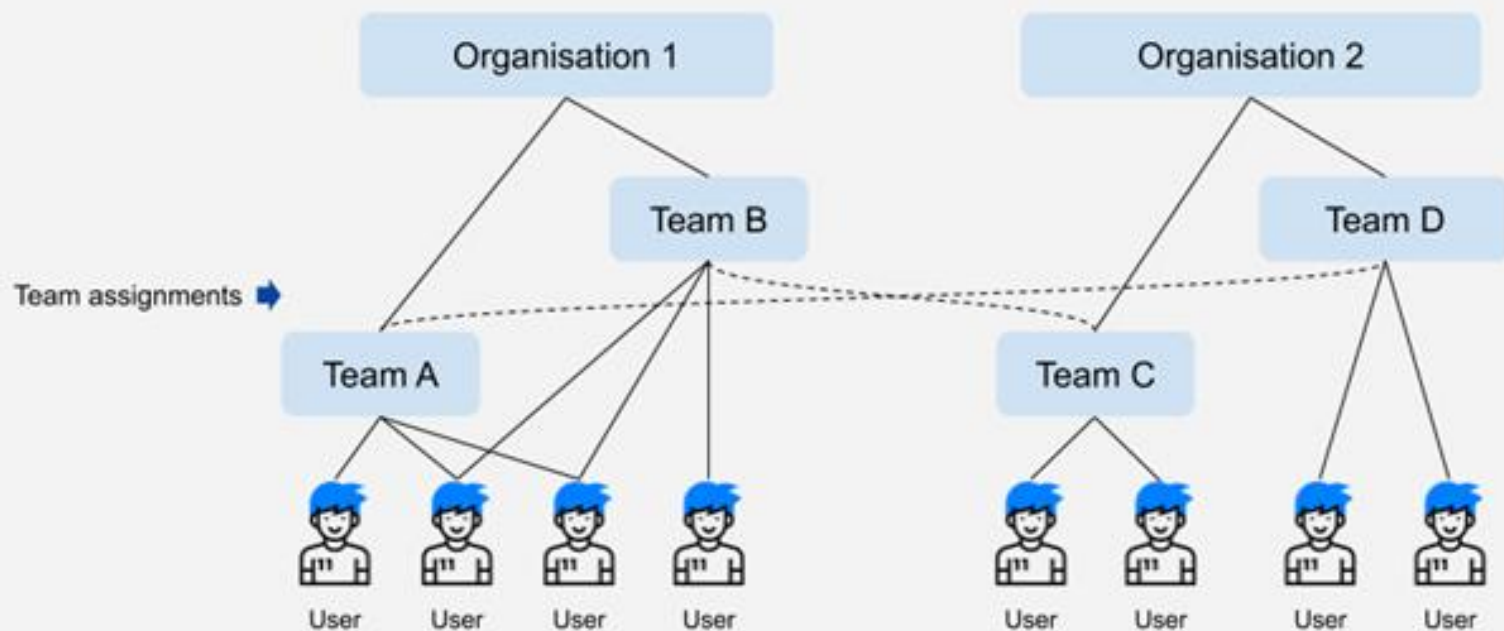
**TIP: Here's that code for sharing!**

# Team Functionality

The team's functionality can seem confusing at first, but once you create and share your first team, you'll realise it isn't that complicated!

Teams will primarily be useful to you if you submit a lot of content or need another organisation to manage uploads/clearance for you. If you do not have the need for multiple teams, you can just use the default team under your organisation which all your members will have default access to.

An Org has many teams. A team belongs to one org.  
 A team can only have members from its org.  
 A team can include **one** tier of sub-team(s)



**TIP: You must be an Organisation Admin or a Team Admin to add a collaborating team.**

The diagram shows the possible team scenarios under an organisation.

As you can see, a user can be assigned to specific teams so that they can manage their workload effectively.

The dotted line shows how teams can be shared from different organisations. Team A has added Team D from Organisation 2 as a collaborating team. This allows Team D to view/create/upload content (depending on their roles) for Organisation 1, but only for the projects Organisation 1 allows.

# **CLEARCAST**



**library**