

CLEARCAST

library

My Organisation

20/05/2022

Dashboard

CLEARCAST

mark_test_agency@clearcast.co.uk

Dashboard

Dashboard

Dashboard

Campaigns

Materials

Distribution Orders

Deliveries

Teams

Registration Requests

Welcome back, Mark TEST!

Create a new campaign here.

Create new campaign +

Materials Summary

Materials Campaigns Orders Deliveries

18 outstanding tasks

- QC failed 2 (5.6%)
- Awaiting upload 16 (44.4%)
- Performing QC 4 (11.1%)
- Complete 14 (38.9%)

ABC/AFTV004/049	Awaiting upload
ABC/AFTV003/030	Complete
ABC/AFTV002/030	Performing QC

Team Requests and Invitations

You have no team requests or invitations

View your teams

View your teams here, whether collaborators, suppliers, or internal teams of colleagues.

This is your dashboard! From here you can quickly navigate to view any of your content

My Organisation

CLEARCAST

The screenshot shows the CLEARCAST interface. On the left is a dark sidebar with the CLEARCAST logo and navigation items: Dashboard, Campaigns (highlighted), Materials, Distribution Orders, Deliveries, and Teams. The main content area is titled 'Campaigns' and features a search bar with the placeholder 'What are you looking for?' and a search input field containing 'Search for campaign name or product name...'. Below the search bar is a table of campaigns with columns for Campaign name, Owning team, and Campaign status. The table lists three campaigns: 'Teleshopping' (Awaiting upload), 'Marvel' (Complete), and 'First walk through' (Awaiting upload). At the bottom of the table, it says 'Displaying all 3 campaigns'. In the top right corner, the user's email 'mark_test_agency@clearcast.co.uk' is displayed with a dropdown menu containing 'My Organisation', 'Settings', 'Help and Support', 'Privacy Policy', 'Terms and Conditions', and 'Logout'. A pink callout box points to the 'My Organisation' option in the dropdown menu.

Some setting are restricted. An Org Admin user will have complete view of all settings.

To view your Organisation's settings, teams, and your users, please select 'My Organisation' using the little arrow beside your email.

Campaign name	Owning team	Campaign status
 Teleshopping	test team Owning team	Awaiting upload
 Marvel	FOUND IT Owning team	Complete
 First walk through	test team Owning team	Awaiting upload

Displaying all 3 campaigns

Users

CLEARCAST

- Dashboard
- Campaigns
- Materials
- Distribution Orders
- Deliveries
- Teams

mark_test_agency@clearcast.co.uk

Mark Test Agency
Agency

Teams **Users** Organisation settings

What are you looking for?
Search for first name or last name or email ...

Advanced Search ^

User's name	Roles	Teams	
 Mark TEST Agency	Creator, Uploader, and OrgAdmin	2 teams	⋮

Displaying 1 user

In this selection you will be able to view all users and their roles. You can also edit these details by selecting the specific user.

Here, you will be able to create a new user and assign their roles and authority.

Search here to find individual users

Some settings are restricted. An OrgAdmin user will have complete view of all settings.

A Creator is a person that can create, Campaigns, Materials and Orders

An Uploader is a person that can ONLY upload Material files.

An OrgAdmin is a person that can create Users and Teams.

Tip: Most users will be a Creator and/or an Uploader.

Create Users

CLEARCAST

- Dashboard
- Campaigns
- Materials
- Distribution Orders
- Deliveries
- Teams

Create new user

Mark Test Agency

First name

Last name

Email

Roles
If no roles are assigned the user will have view only access

Invitation message

Some settings are restricted. An Org Admin user will have complete view of all settings.

Assigning different roles allow you to control what user can do within your organisation user to

Creating a new user, will activate an email from The Library to the new user.

Tip : Most users will be a Creator & Uploader.

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 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.

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](#)



• No materials

1 (100%)

Parent Team 2 orders

[View all](#)



• 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



[Add new member](#)

Collaborating Teams

[Add new team](#)

Child Team 2 (2 Mitch test organisation)
Creator and Uploader



Here you can edit the permissions or remove the collaboration.

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

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.

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.

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 sections:

- 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 list box containing one member: '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' (points to the Teams sidebar item).
- Top-right callout:** 'Choose your team name here.' (points to the Team name input field).
- 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)' (points to the 'Everyone at 1 Mitch Test Organisation...' radio button).
- Bottom 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.' (points to the 'Add members individually' radio button).

A separate callout box on the left side of the main content area states: 'Some settings are restricted. An OrgAdmin user will have complete view of all settings'.

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:

- Invitation Method:** A section titled 'I would like to invite a team by' with three radio button options: 'A Team code' (selected), 'Searching existing team', and 'Email address'.
- Code Input:** A text input field labeled 'Invite team with a code'.
- Role Selection:** A text input field labeled 'Role(s)'.
- Access Note:** A note stating 'If no roles are assigned to the collaborating team this team will have view only access'.
- Access Toggle:** 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 of the form.

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

Users within a Team

■ CLEARCAST LIBRARY
Search...
mark_test_exec2@clearcast.co.uk

- Dashboard
- Campaigns
- Materials
- Distribution Orders
- Deliveries

Clearcast Agency Users

Agency Create new team +

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

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

Users in Teams

CLEARCAST LIBRARY
Search...
mark_test_exec2@clearcast.co.uk

- Dashboard
- Campaigns
- Materials
- Distribution Orders
- Deliveries

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

7
campaigns

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

[View all](#)

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

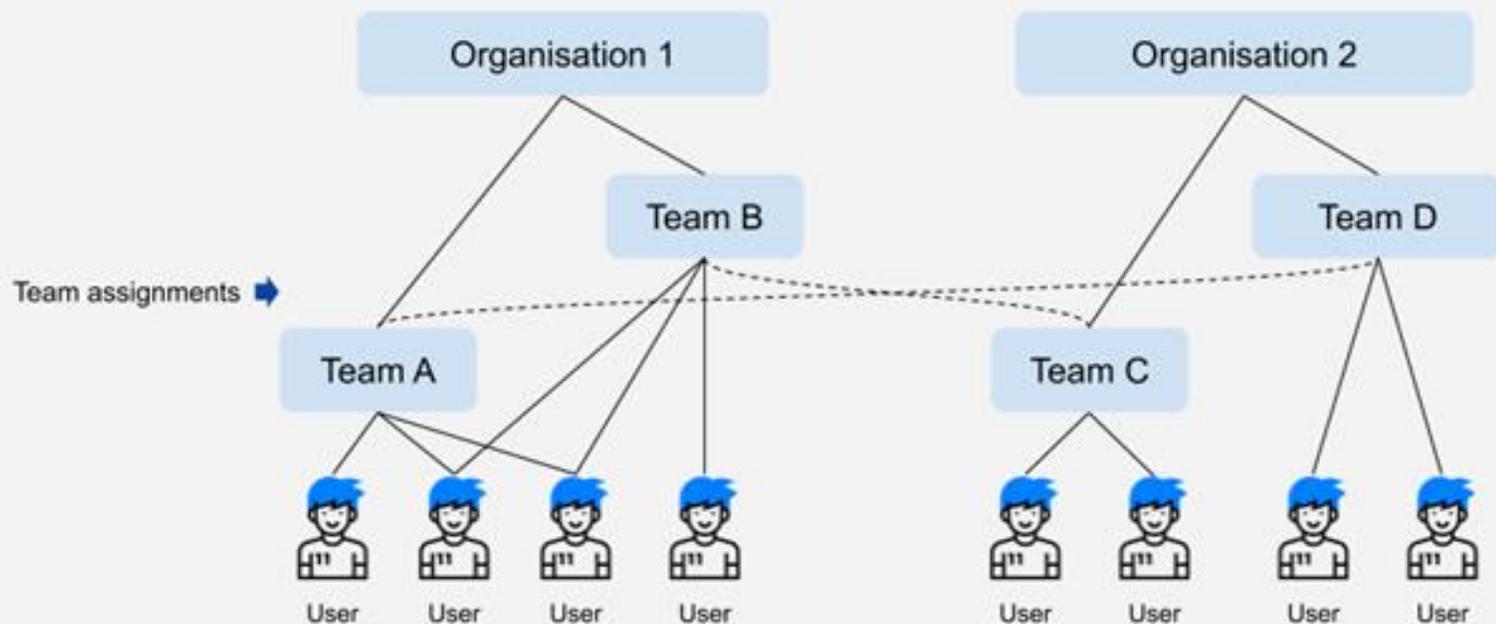
TIP: Here's that code for sharing!

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