

Welcome to your new Chorus site

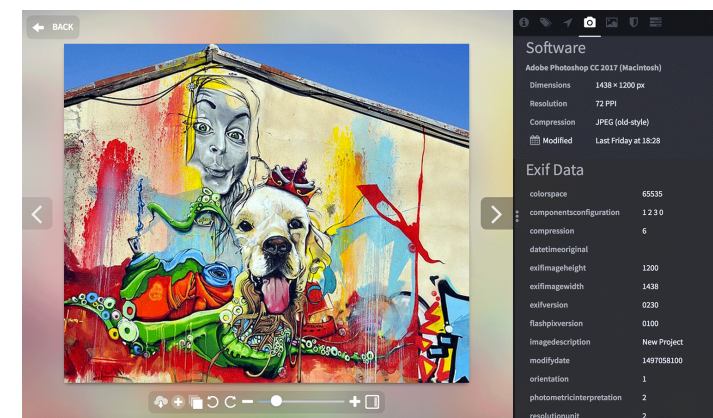
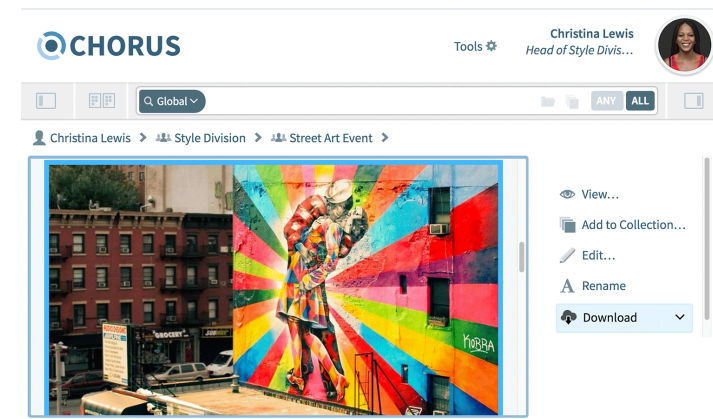
As the initial site admin, it is your responsibility to shape your Chorus site, and adjust its initial settings.

This document will guide you through how to:

1. Understand Chorus spaces
2. Understand cascading metadata
3. Plan and sketch your site
4. Sign in and edit your profile
5. 'Elevate' to access site admin tools
6. Edit basic site settings
7. Create your first top-level spaces
8. Create your first users
9. Appoint users to manage top-level spaces
10. Create users within top-level spaces
11. Set up the site metadata catalog
12. Practise user impersonation

Contact us for Chorus support

Third Light's Support Team and Training Manager are ready to help you with any stage of your site setup and user training. Email support is free for all Chorus customers. Just ask@thirdlight.com.



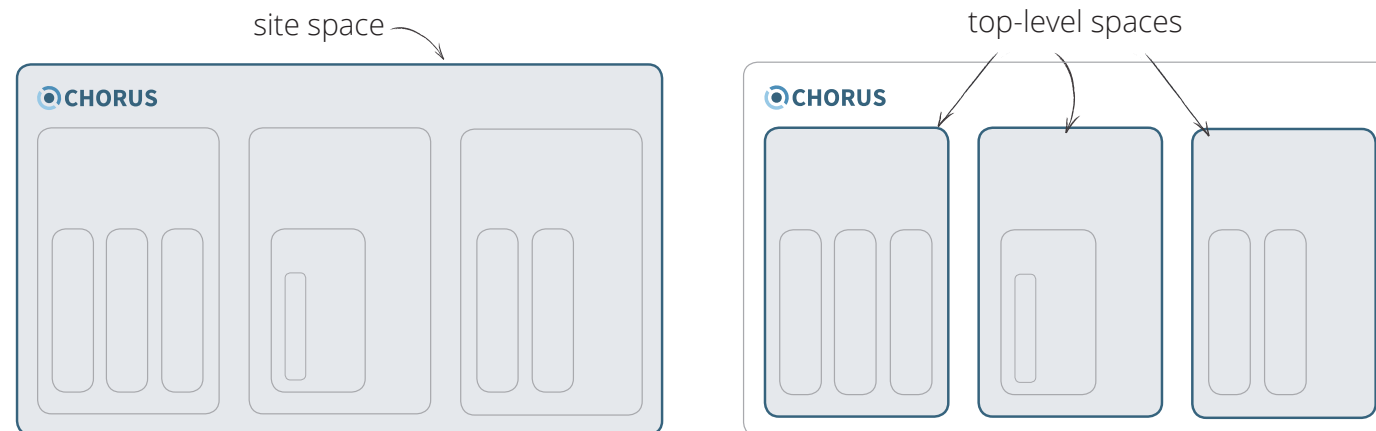
CHORUS SETUP

For the initial
site admin

1. Understand Chorus spaces

The whole of your Chorus site is built with spaces, nested inside one another.

The **site space** encompasses the entire global site, including all its users and files. This is the level which site admins control.



During initial setup, you will create the site's top-level spaces.

- Top-level spaces are located immediately beneath the global site in the hierarchy of your Chorus environment.
- Top-level spaces often mirror an organization's departments or divisions.
- All other work and library spaces, user home spaces, folders, and files created in your Chorus site will be nested inside these top-level spaces.
- There is no limit to the number of top-level spaces that can exist in a Chorus site.
- **To learn more about Chorus spaces, see the User Guide, Chapter A3.**

CHORUS SETUP

For the initial
site admin

2. Understand Chorus metadata

All Chorus metadata behaves in the same way: It ‘cascades’ down.

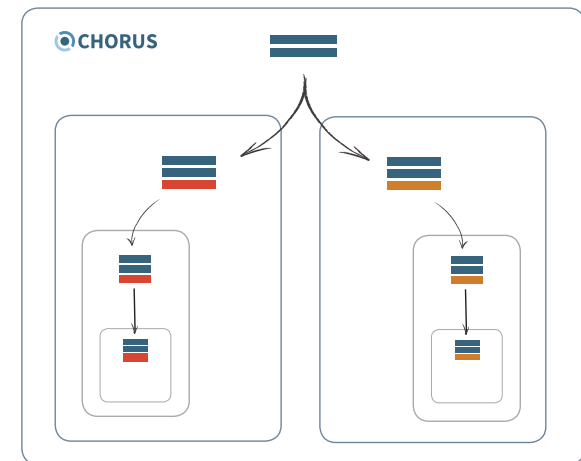
Where metadata is applied to a space or folder in Chorus, it will ‘cascade’ down onto the subspaces, child folders, and files located beneath it in the site’s hierarchy.

Cascading metadata makes it easy to strategically apply metadata to large numbers of files:

- Apply metadata to a space high in your site’s hierarchy, and you have quickly and efficiently applied that metadata to all the files that fall beneath its cascade.
- Apply metadata to a different space, and you have applied different metadata to all the files beneath its cascade.

During initial setup, you will shape the site metadata catalog.

It is the initial site admin’s role to set up the **site metadata catalog**. The catalog defines which metadata panels will be made available on files across the entire site. See more on this later in this document. For now, keep the cascading metadata behavior in mind for your site planning.



CHORUS SETUP

For the initial
site admin

3. Sketch your site

Before creating any spaces, it is worth sketching a rough visual plan for your Chorus site.

Changes to your site structure can be easily made at any stage, but starting with a visual 'mud-map' is a good idea.

Questions to consider in your plan are:

- Q. How many top-level spaces do I want?
- Q. What will they be named?
- Q. Who might manage these spaces once they are created?

Chorus is designed to make your site admin work easier! You can choose to manage all site-level spaces yourself, co-manage them with colleagues, or entirely delegate their management to other team-members. Managing spaces is not challenging and requires no site admin privileges. Keep this in mind.

Good to know: The Third Light team can help you sketch your site. Talk to us about your company structure and how you work with digital media. We have more than 15 years' experience in digital asset management – we know what works for a variety of businesses.



CHORUS SETUP

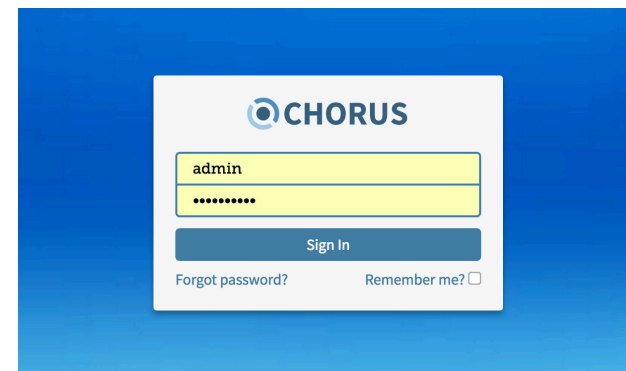
For the initial
site admin

4. Sign in and edit your profile

Like all Chorus users, your first task is to sign in and adjust your profile avatar.

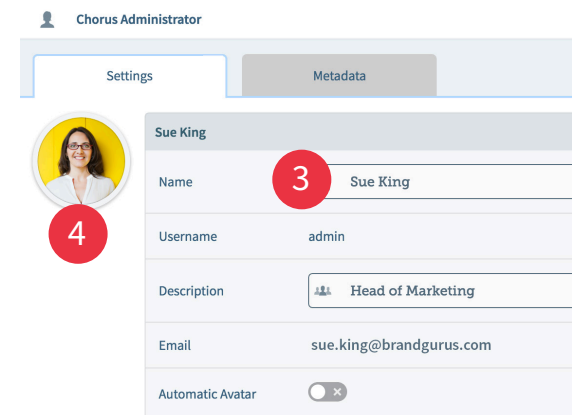
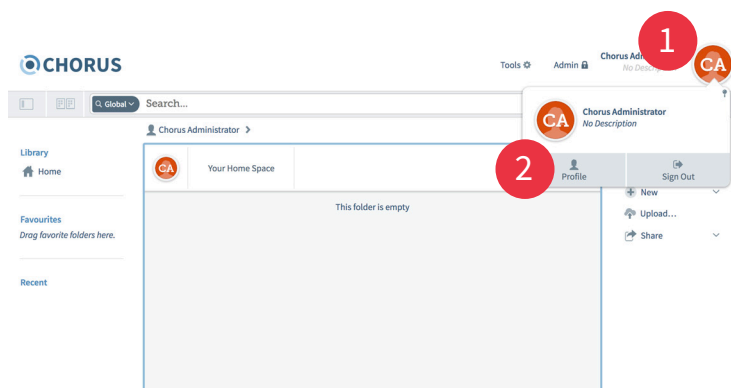
Sign in with your username and password

About your username: Your Chorus username was automatically generated when your account was first created. It can be found in the 'Please set your password' email that was sent to you when your account was created. Your username is not your email address, but a string of lowercase letters, such as 'admin'.



Change your profile avatar and details

1. Once signed in, click on your **profile avatar** in the top right-hand corner of your Chorus desk. This will appear as 'CA' (Chorus Administrator) until you change it.
2. Click **Profile**. Your profile modal will open.
3. Edit your name and description, if necessary.
4. Change your profile avatar. For help with this, see the Chorus User Guide.



5. 'Elevate' to access site admin tools

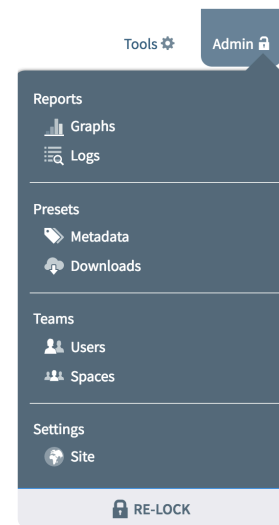
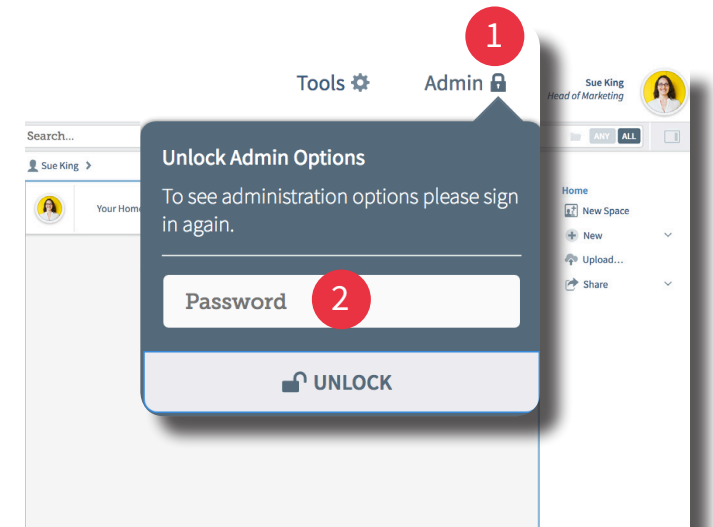
As a site admin, you have access to Admin tools that are hidden to other users.

To use these tools at any time:

1. Click the **Admin** lock at the top right-hand side of your desk.
2. Enter your Chorus password.

This is known as 'elevating'. You have elevated yourself from the position of user to site admin.

When you are elevated, your desk and home space will appear unchanged. Your site admin powers and tools however, are now unlocked and enabled.



Through your **Admin** tools, you can access:

- Graphs and logs of user activity and file status
- The site metadata catalog
- The site download catalog
- A list of all users in the site
- A list of all top-level spaces
- Site settings

To de-elevate and work as a regular user in your Chorus site, click the Re-Lock button.

6. Edit basic site settings

Go to the Site Settings modal to set the site logo, recycling bin, and password policy.

Site settings can be edited at any time. If preferred, skip this step and return to it later.

Access site settings

1. Click **Admin** at the top of your desk.
2. Choose **Settings > Site** from the Admin menu.
The Site Admin modal will open.
3. Go to **Site** settings.



Edit settings to suit your business

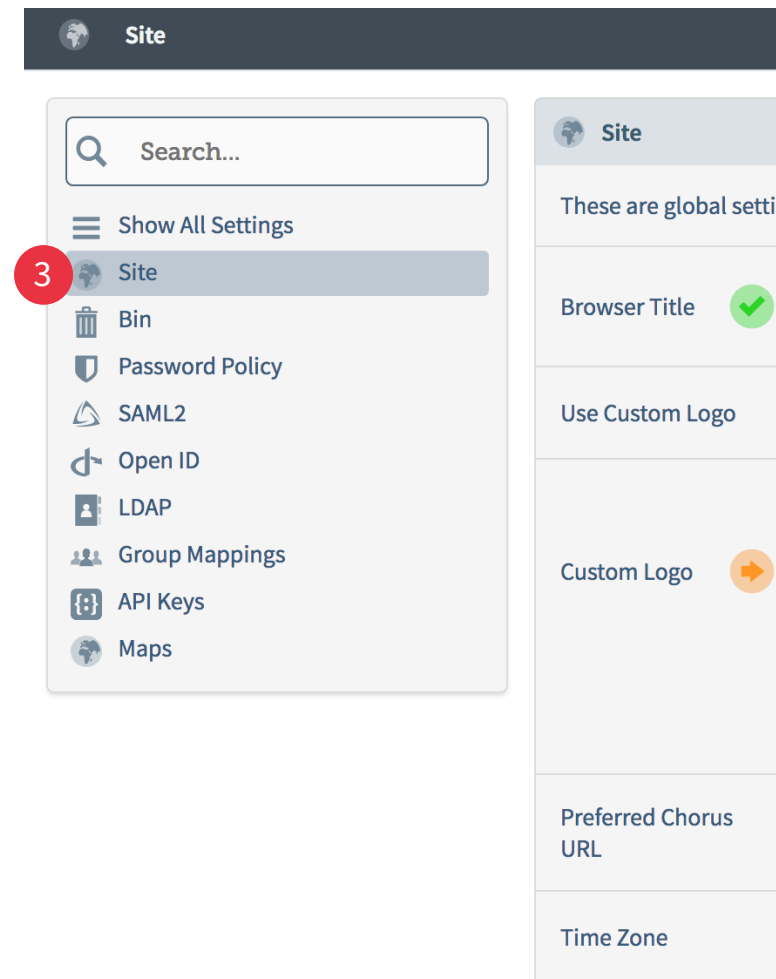
Consider editing the following settings:

Custom Logo: Drag an image file into the logo box and click **Save**.

Recycling Bin: Choose the frequency of automatic bin emptying for all users across the site. Choose **Empty manually** to enable users to empty their own bins.

Password Policy: The default password policy of a new Chorus site is seen in this tab. Adjust the available switch to **Use a custom password policy** to edit the policy.

- Details on all site settings, including external authentication, can be found in the Chorus User Guide.

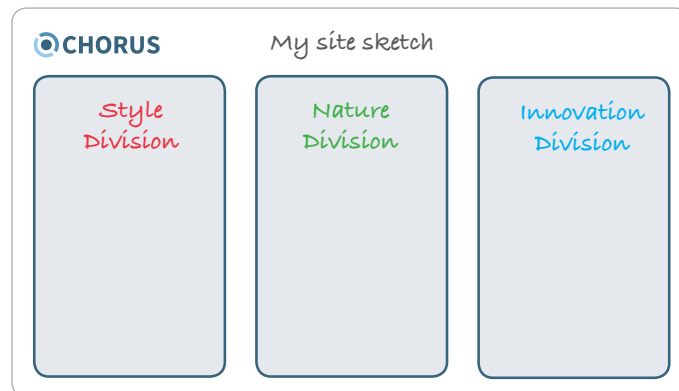


CHORUS SETUP

For the initial
site admin

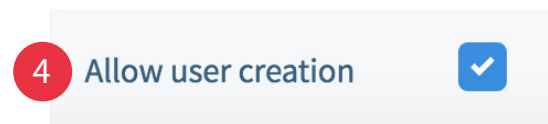
7. Create your first top-level space

Create your site's first spaces using the Admin tools



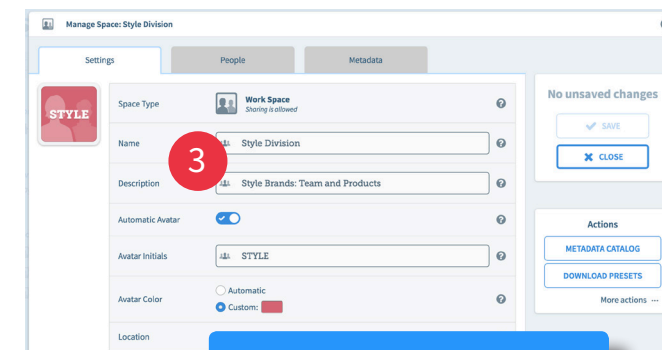
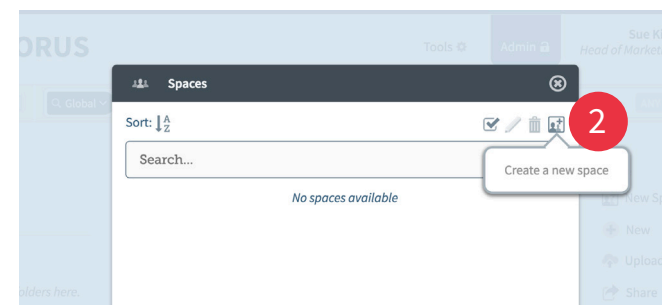
A Create New Space modal will open.

3. Enter a name, short description, and optional avatar for this space.
4. Check the **Allow user creation** box. This allows managers of this space to create new users inside it.



5. If not automatic, **Change Location** for this space to 'Site'. This makes it a top-level space.
6. Click **Save**.

1. Click **Admin > Settings > Teams > Spaces** from the Admin menu. The Site Spaces list will open.
2. Click the **Create New Space** symbol in the top right-hand corner of the list.



5 **CHANGE LOCATION**

CHORUS SETUP

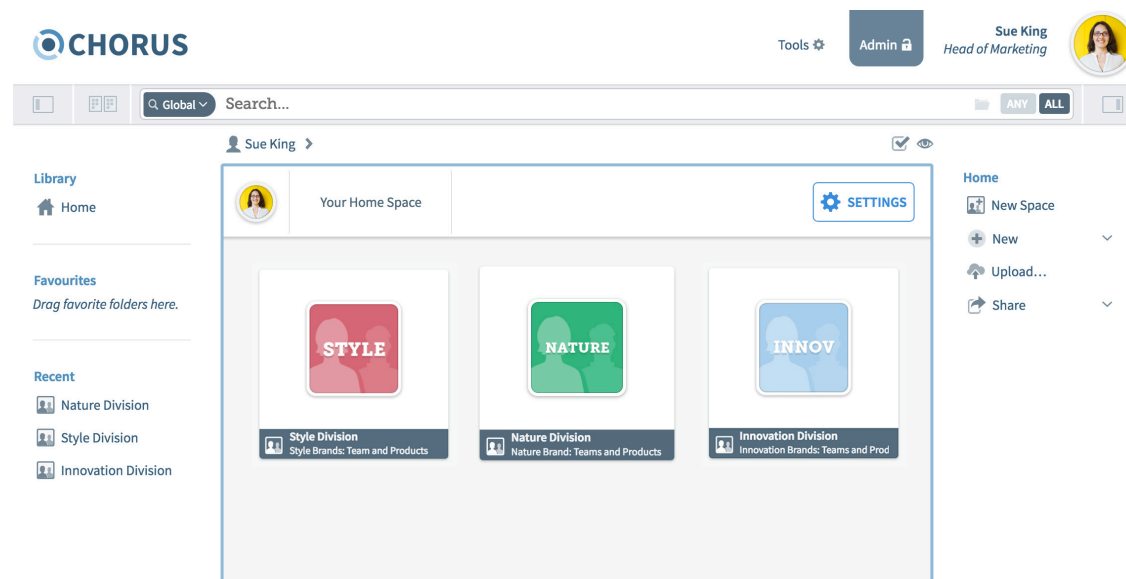
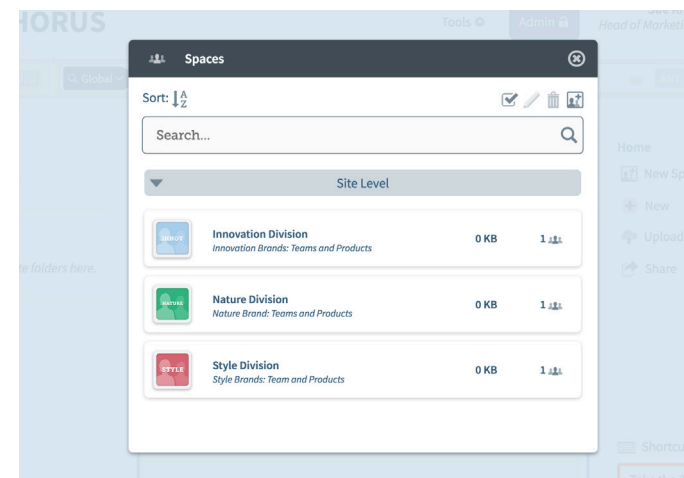
For the initial
site admin

Repeat this process to create all top-level spaces

Create all of your top-level spaces in the same way.

See your top-level spaces:

- All of your top-level spaces will appear in the Site Spaces list.
- Avatars for the new spaces will also appear in your home space.
- Double-click on an avatar to open the space in your central viewing pane.



8. Create your first users

As initial site admin, it is your task to create the first users of a Chorus site.

In the first instance, create five to 10 user accounts, for the people who will be most significant to the top-level spaces. More and many users and external users can be created at a later date.

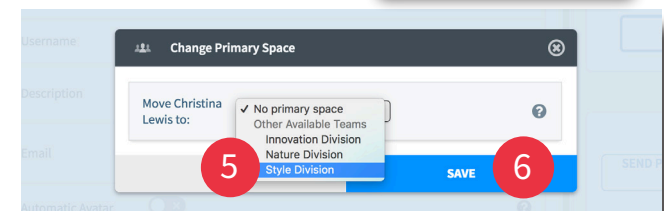
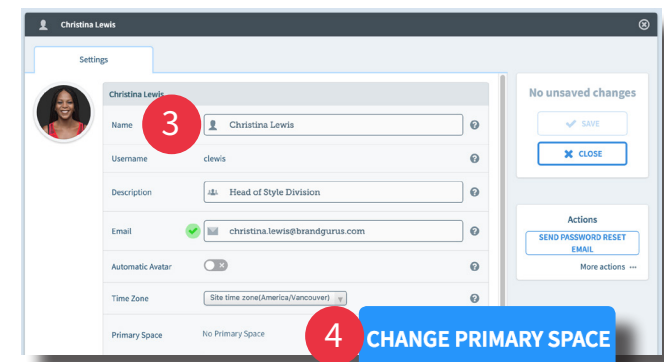
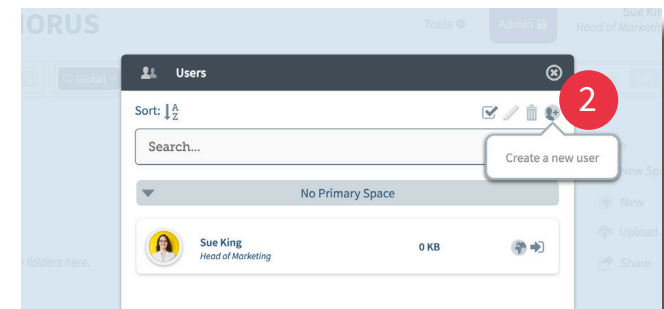
Create a user

1. Click **Admin > Settings > Teams > Users** from the Admin menu. The Users list will open.
2. Click the **Create New User person symbol** in the top right-hand corner of the list. A Create New User modal will open.
3. Enter a name, email, and optional job description for this user. Note that a user's username is automatically generated.

Assign this user to their primary space

A user's primary space is the highest-level space in which they belong. For more, see 'About: A user's primary space' in the Chorus User Guide.

4. Click the **Change Primary Space** button.
5. Select the top-level space that will become this user's primary space from the dropdown menu.
6. Click **Save**.

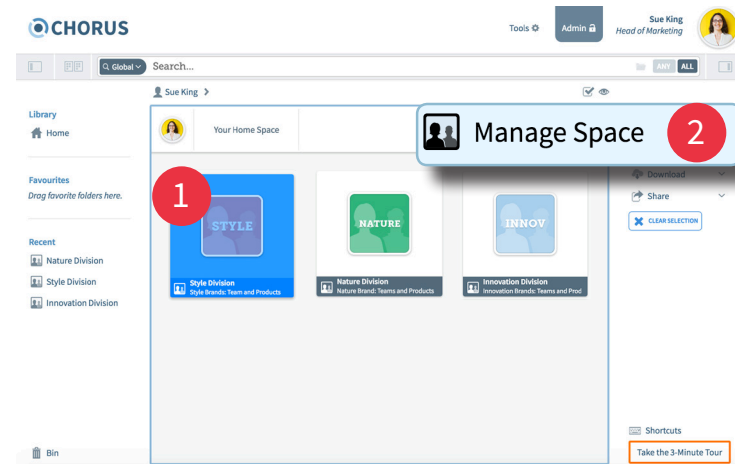


9. Appoint users to manage top-level spaces

Appoint managers to each of your top-level spaces, and share the workload of creating users and uploading files into these spaces.

As creator of the new top-level spaces, you are automatically a manager of those spaces. Appoint additional managers to share the workload of each space. Managers of any space are responsible for giving other users access to it (membership), and controlling the metadata catalog and download catalog of their space.

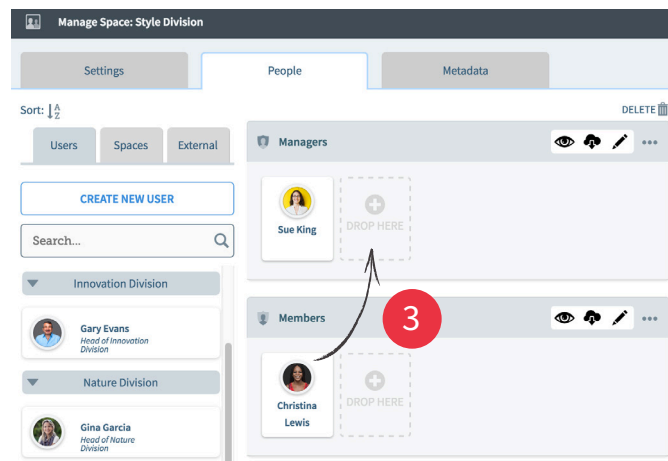
Good to know: There is no limit to the possible number of managers of a space. Once you have delegated management of a space, it is possible to then remove yourself from the managers role.



Appoint a user to co-manage a space

1. Select the space you want to manage.
 2. Click **Manage Space** in the right-hand sidebar.
- The Manage Space modal will open at the People tab.
3. **Drag and drop users** into the Managers carousel to appoint them managers of this space.
 4. Click **Save**.

- The new space manager/s will now see a 'Manage Space' button on their desk when this space is open.



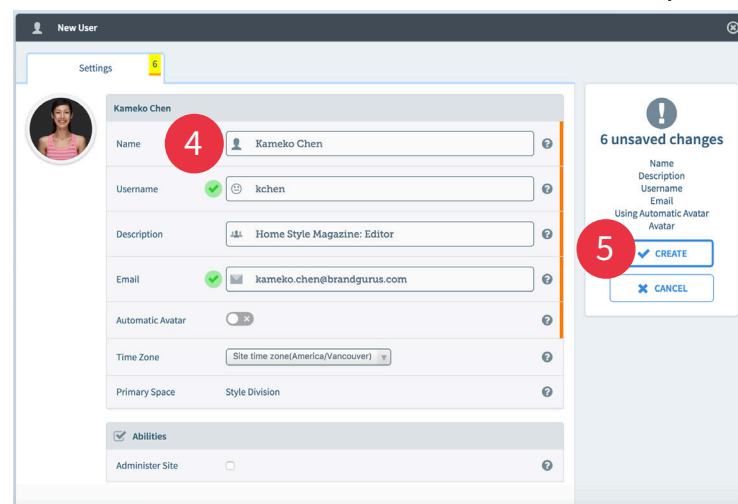
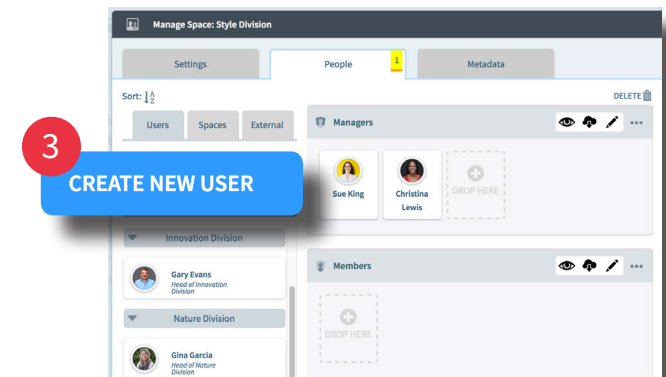
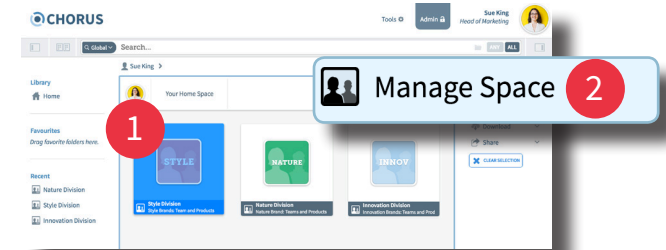
10. Create users within the top-level spaces

Create all of your Chorus users in the top-level spaces to which they belong organizationally.

Whether you are a site admin managing a space, or a regular user-manager of a top-level space, this task is achieved in the same way.

Create new users in a space

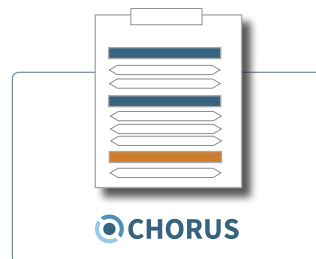
1. Select the space in which you want to create users.
2. Click **Manage Space** in the right-hand sidebar. The Manage Space modal will open at the People tab.
3. Click **Create New User** at the top of the people column of this modal. A New User modal will open:



4. Add the name and email for this user. They can add other details at a later time.
 - Notice that the Primary Space for this user is already filled. It is the top-level space in which the user is being created.
5. Click **Create**. This user will receive an email with sign in instructions.

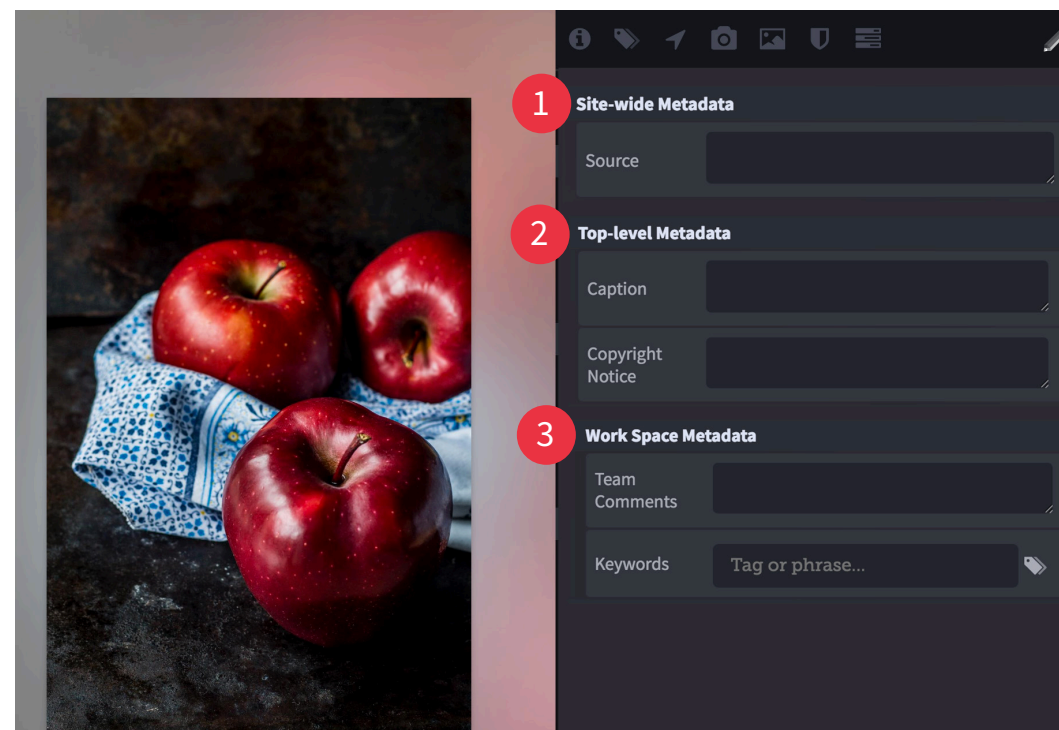
11. Set up the site metadata catalog

Add metadata panels and fields to the site metadata catalog to make these available on all files in the site.



Like every space in Chorus, the site has a **metadata catalog**. This is a menu of the metadata panels and fields that are applied to all files and folders in the site.

Note that the metadata itself – the text and data that will define and describe files – is *not* added to files at a site level. It is only the metadata catalog – or metadata framework – for the files that is created at this level.



1. Panels created in the **site** metadata catalog will appear on all files for users to edit.

2. Additional panels are created in the metadata catalog of the **top-level** spaces.

3. Yet more panels can be created in the metadata catalogs of all **subspaces**.

CHORUS SETUP

For the initial
site admin

Add a panel to the site metadata catalog

1. Click **Admin** at the top of your desk.
2. Choose **Presets > Metadata** from the Admin menu.
The Metadata Catalog for Site modal will open.
3. Click **Create Panel**.
4. Give the new panel a name.

Metadata Catalog for Site

Panels Fields

EDIT DELETE

PANELS FOR SITE

Site-wide Metadata 4

Share this panel Apply this panel to root folder 7

Fields

Source Text

Add a field

Site
By-line
By-line Title
Caption 5
Category
City
Company Division
Copyright Notice

CREATE PANEL

5. Add a field to the panel: Select a field type from the dropdown menu and click the **plus symbol**.
6. Add additional fields to the panel as above. To create custom fields for this list, choose the **Fields tab** of this modal.
7. Tick the **Apply this panel to root folder** (Apply panel to all subspaces) box to apply this panel to all of the subspaces within the site.

Tools ⚙️ Admin 1

Reports

- Graphs
- Logs

Presets

- Metadata 2
- Downloads

Teams

- Users
- Spaces

Settings

- Site

RE-LOCK

TIP:
Keep your site metadata
panels simple!

For more, see 'Administrating the site
metadata catalog' in the User Guide.

CHORUS SETUP

For the initial
site admin

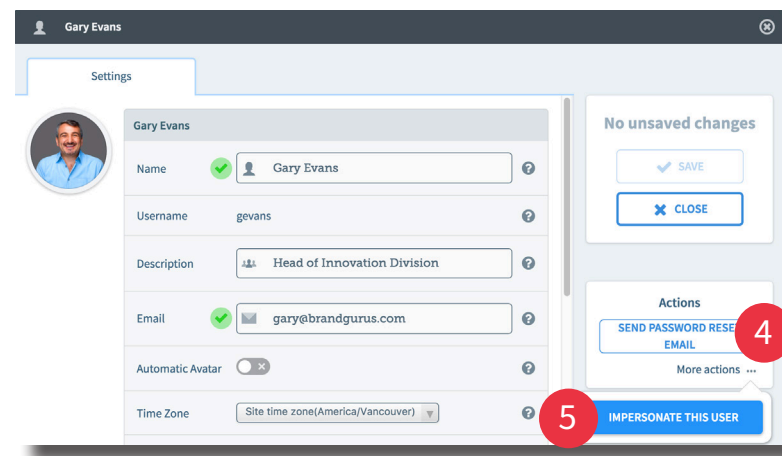
12. Practise user impersonation

In cases of troubleshooting and problem-solving, site admins can impersonate another user to access their home space, membership to other spaces, and recycling bin.

- User impersonation is a powerful site admin tool.
- It should be used infrequently and with respect.
- Only site admins can impersonate other Chorus users.

Impersonate a user

1. Click **Admin** at the top of your desk.
2. Choose **Teams > Users** from the Admin menu.
The Users list will open.
3. Double-click a user's name.
Their profile modal will open.



Good to know:

When you impersonate a user, they will receive an automated email notification of the event.

4. Click the **ellipsis** in the Actions box at the right of the modal to reveal a hidden button.
5. Click the **Impersonate This User** button.
The home space of this user will open. You are now impersonating this user and all of your actions will be attributed to their account.
6. Click the user's **profile avatar** in the top right-hand corner of their desk to reveal a de-impersonate button.
7. Click **de-impersonate** to return to your own profile and home space. Continue to work as yourself.

CHORUS SETUP

For the initial
site admin

Your site is ready to go!

Congratulations on getting your Chorus site up and running.

What are the next steps?

The skeleton for your site is in place. See the Chorus User Guide to achieve the next tasks:

- **Appoint more site admins.** We recommend sharing site admin responsibilities with a small team.
- **Guide the managers of your top-level spaces** in configuring the metadata catalogs for their spaces. All Chorus metadata catalogs work in the same way.
- **Adminstrate the site download catalog.** Like metadata catalogs, download catalogs offer download presets that are available to all site users.
- **Upload files into the top-level spaces.** There are many ways to upload files into Chorus, and large uploads are catered for with the Chorus Uploader and FTP capabilities.
- **Apply metadata to all files in the top-level spaces.** Even minimal tagging at an all-space level can have a big impact on organizing your files.

Where can you get help?

- **Get in touch** with any question. We're here to make Chorus work for you.
- **Join a Chorus webinar** for live, free instruction.
- **Book Chorus training** for yourself or your team.

We'll talk you through important digital media workflow and 'digital asset management' (DAM) principles that include:

Defining your metadata structure
Uploading your files
Downloading and reformatting files
Sharing files with others
Managing user permissions.

ask@thirdlight.com